HCM User Guide 17-01

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1 Introduction to the HCMUG



State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

1.1 How To Use This Guide

Introduction
Icons
Video Demonstrations (Demos)
How To Use This Guide

Introduction

Welcome to the Human Capital Management User Guide (HCMUG). This guide is intended for State of Wisconsin Human Resources (HR) staff using STAR HCM. It is a process guide. In general, it will list step-by-step instructions for how to complete a task in STAR HCM.

The STAR Job Aids are being phased out and incorporated into this handbook.

- Once a Job Aid is made obsolete, a redirect link will be made from the old Job Aid to the new section of this handbook.
- If the Job Aid has not been incorporated yet, a redirect link will be made from this handbook to the Job Aid.
- See the Job Aids at STAR HR, Payroll, and Benefits Job Aids

Icons

Several icons are used consistently throughout the Guide.



Remember - An item you should take note of



Tip - A helpful hint



Warning - An error-prone or important process



Watch Video - Screen capture demonstrations of a process.

Video Demonstrations (Demos)

Throughout the Guide, you may see the icon below. This is a link to a screen capture demonstration of how to do a task. Process steps will always be written out and include screenshots. But demos can be a quicker and easier way to teach process steps. They will be phased in and added in subsequent releases. Many will have audio, so use a PC headset when watching demos.



How To Use This Guide

The link below is a brief interactive overview to explain the functionality of the HCMUG. Click on the icon to begin.



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2 Top Processes

2.1 Hire/Rehire

2.1.1 Adding An Employee (New Hire/Rehire)

Ensure_Position_Date_Is_Updated
HR_-_Search_For_An_Existing_Person
HR_-_Enter_Job_Data
HR_-_Enter_or_Update_Personal_Biographical_Data__New_Hire_or_POI_Contingent_Worker_to_Employee_Only
HR_-_Add_A_Person_Profile
    Add_a_Probation
    Enter_a_Veteran_Disability
    Enter_a_Severe_Disability
Time_And_Labor_-_Enter_Time_And_Labor_Data
Time_And_Labor_-_Assign_A_Schedule
Payroll_-_Verify_Update_Federal_And_State_Tax_Data
Payroll_-_Set_Up_General_Deductions
Payroll_-_Enroll_In_Direct_Deposit
Benefits_-_Enter_ABBR_For_Life__ICI__And_AD_D
Benefits_-_Open_Events_Query
    Run_the_Open_Events_Query
    Sample_of_Query_Output
Benefits_-_EBenefits_For_New_Hire__Not_Hire_From_Affiliate_
Benefits_-_Paper_Application_Entry
Benefits_-_HIR_Event_-_What_Does_It_Do_
Benefits_-_HFA_Event_-_What_Does_It_Do_
Checklist:_Entering_A_New_Hire/Rehire
Resources

Ensure Position Date Is Updated

Role: Position Management Specialist
Prior to entering a new hire/rehire into PeopleSoft, including LTEs, the Agency Position Management Specialist will request updates to the position. This is done through the Position Request form. More information is available in the Viewing Position Data Job Aid and 3.5.3 Position Updates.

Employees should not be hired into positions that have not been evaluated by the Agency Position Management Specialist.

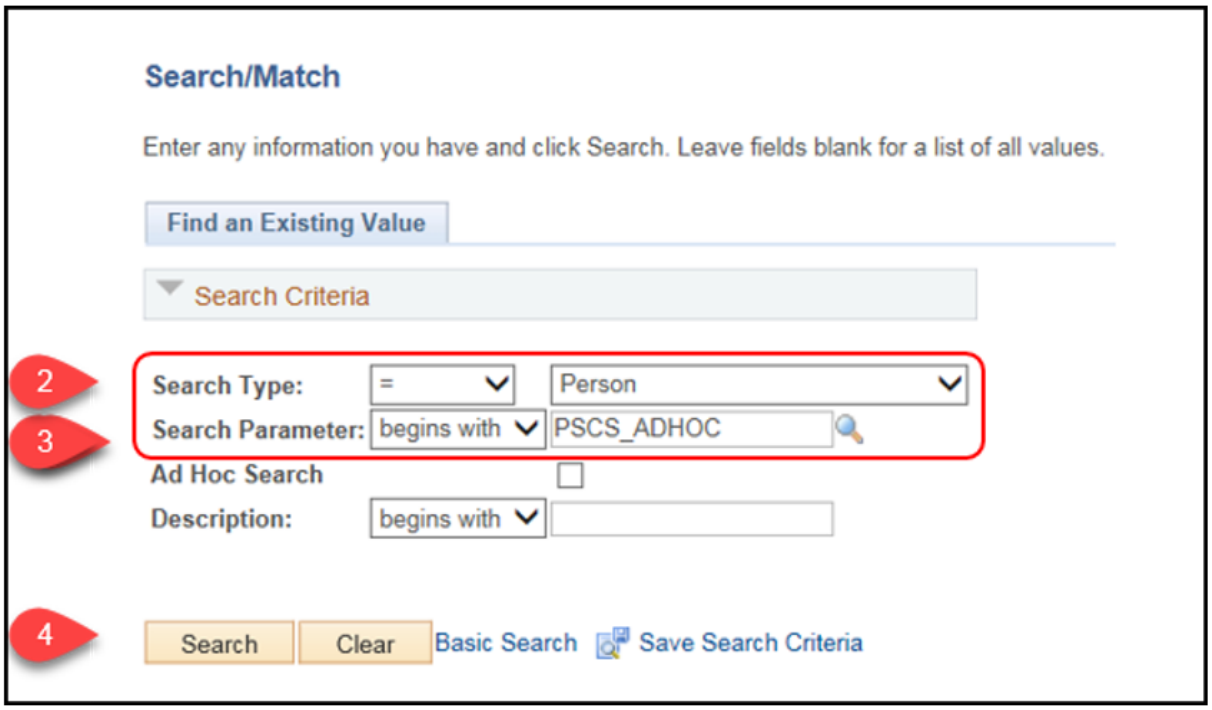
Ensure information such as reports to, classification, FLSA, department ID, location, funding, etc. are all updated on the position prior to filling it. If updates are not made prior to filling it you must submit a STAR Support Ticket to have the position updates made. Do not add position data rows to make corrections to a position that should have been made prior to filling it.

HR – Search For An Existing Person

Role: HR Personnel Roster Role
It is important to look up employee names in PeopleSoft prior to entering a hire to ensure that they aren't already in the system. Search for People is one way that an agency can view data about employees who are in other agencies.

STEP 1: Navigate to the Search for People page

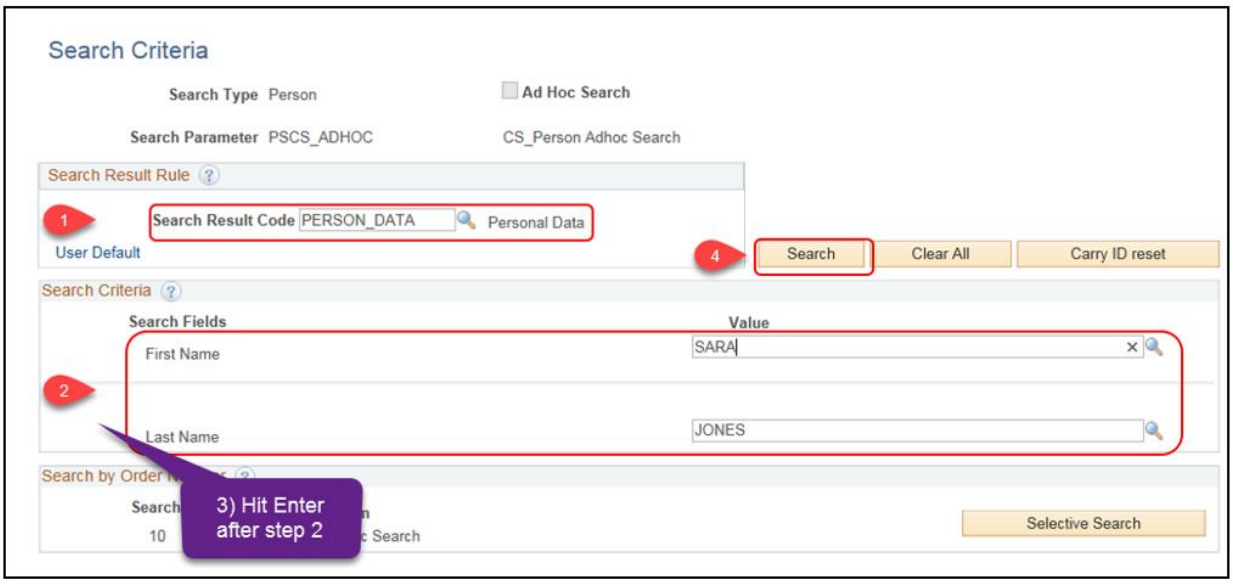
1. Navigation: **Main Menu > Workforce Administration > Personal Information > Search for People**
2. Select Search Type of Person
3. Enter Search Parameter of PSCS_ADHOC
4. Click Search



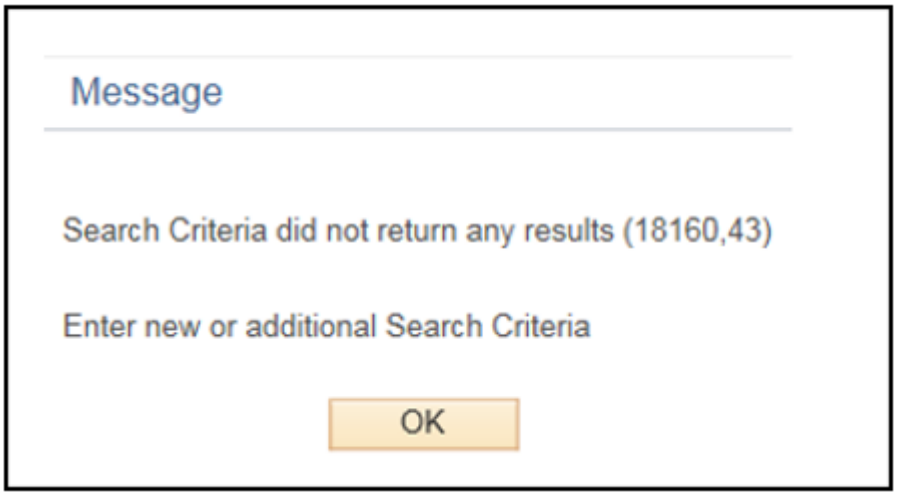
STEP 2: Enter the criteria to search for the desired person

1. Enter or select Search Result Code of PERSON_DATA. Additional options are available to return various data for purposes other than determining if a person exists. Refer to 3.3.1.1 Search for People for details.

2. Enter the desired person's first and last name into First Name Search and Last Name Search respectively
3. Press [Enter] on your keyboard to activate the Search button. (**Note**: Search values change to all caps)
4. Click Search



RESULTS: If the person does not exist in the system, the below message window displays. You should also search for the person in the Personnel Roster to ensure they have never been employed with the State before continuing with the new hire process. See 4.5 State Employee Roster Query for instructions on how to search for people in the Personnel Roster. The Enterprise Personnel Report allows searching for people who are in PeopleSoft but not within your agencies security, and are either active or inactive. This helps to avoid duplicating employee records for employees who already have an Empl ID in the system. If accurate results display, stop the new hire process and use a rehire or transfer process instead.



If a person is in PeopleSoft as a Contingent Worker or Person of Interest they may not have all the information needed to search for them and avoid duplication.

Please use all available search options to ensure the person is not already in the system before adding them. If you realize you've duplicated a person submit a STAR Support Ticket as soon as possible.

HR – Enter or Update Personal/Biographical Data (New Hire or POI/Contingent Worker to Employee Only)

Role: Agency HR Specialist

If the employee does not exist in PeopleSoft, add the person.

Also, if hiring an employee (adding an employment instance) who was previously a POI or Contingent Worker, be sure to go back and update the information for all fields listed below, do not add a new/duplicate person. This MUST be done before Job Data is entered or a benefits event will not open and the employee will not be enrolled in WRS or benefits programs.

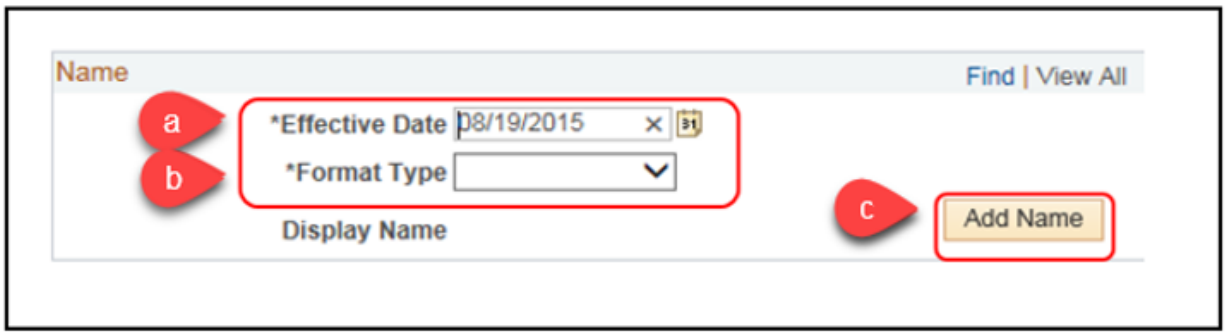
STEP 1: Navigate to the Add a Person page

1. Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Add a Person**
2. Click Add Person

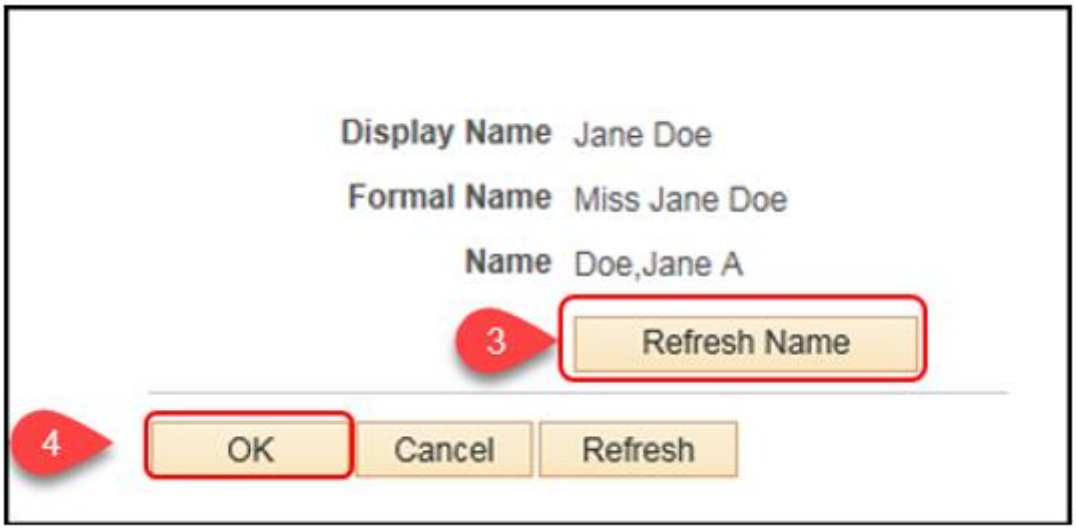

Do not change or add to the value of NEW in the Person ID field. PeopleSoft generates the Person ID.

STEP 2: Add Biographical Details. Required fields are indicated with an asterisk in this job aid.

1. Enter the following information in the Name section of the Biographical Details tab:
    a. *Effective Date: The date that the hire is effective, or today's date – whichever is earlier. The person data has to have an effective date on or before the hire effective date in order for job data to be created.
    b. *Format Type: English
    c. Click Add Name to enter the employee's name



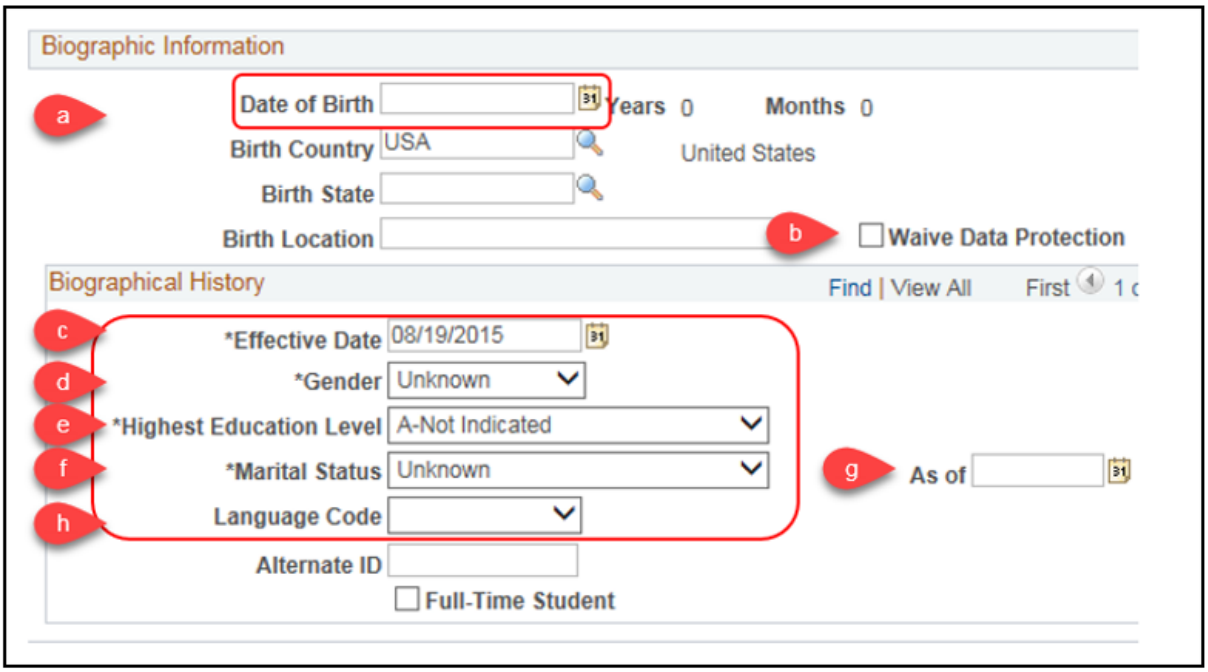
2. Enter the following information:
    a. Prefix: Preferred prefix of the employee (optional)
    b. *First Name: The employee's legal first name as it appears on their Social Security Card
    c. Middle Name: The employee's middle name or middle initial as it appears on their Social Security Card
    d. *Last Name: The employee's legal last name as it appears on their Social Security Card
    e. Suffix: The employee's suffix, if applicable
3. Click Refresh Name. Information in the Display Name, Formal Name, and Name populates.
4. Click OK



5. Enter the following information in the Biographical Information and History sections:

    a. *Date of Birth: This data is required for benefits and WRS purposes

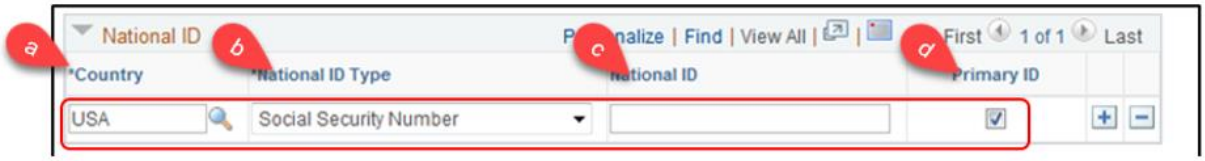
b. Waive Data Protection: This box should be UNCHECKED for most employees. Used as an indicator for employees who have personal situations that make it necessary for their data to be excluded from external systems (only check if the employee needs to have their data protected).
c. *Effective date: For new hires/rehires, this will be the hire date or today's date, whichever is sooner. This date should be the same as the other person effective dates.
d. *Gender: This data is required for EEO reporting and WRS purposes
e. Highest Education Level (optional)
f. *Marital Status. If an employee plans to enroll in insurance, this field is required. If unknown at time of entry, update as soon as information is known.
g. *As of date: date the marital status became effective
    - This is not required if Marital Status = Single
    - This date is required if Marital Status is anything except Single
    - If married or in a domestic partnership, the date must match the date list for the spouse or domestic partner on the Update Dependent/Beneficiary page.
h. Language Code: Preferred language (optional)



6. Enter the following information in the National ID section:

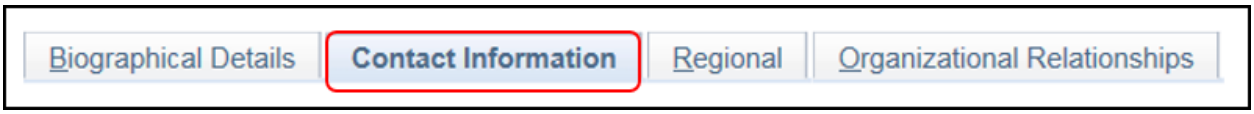
a. *Country: USA
b. *National ID Type: Select 1 - Social Security Number
c. *National ID: Enter the employee's Social Security Number

d. *Primary ID: Keep selected

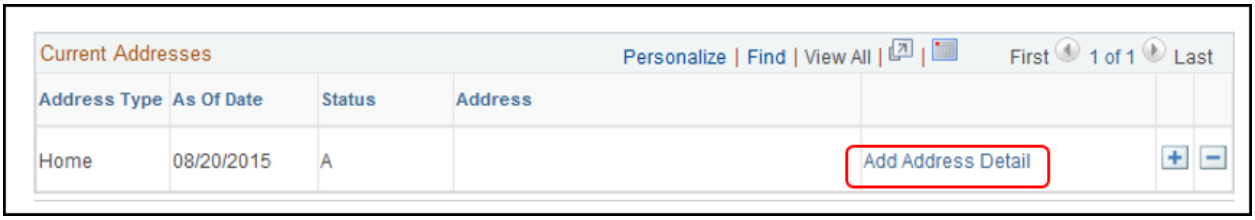


STEP 3: Add Contact Information

1. Click the Contact Information tab



2. Click Add Address Detail to add the employee's home address



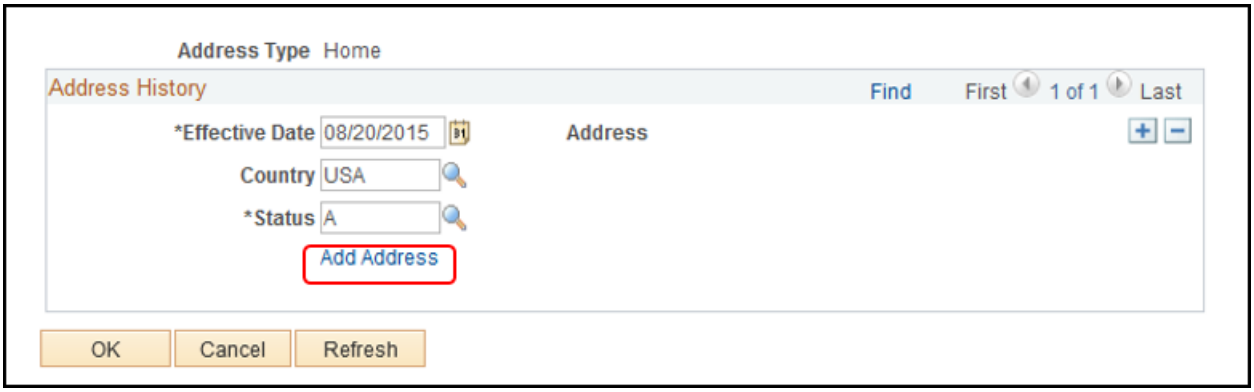
3. Enter the following information:

a. *Effective Date: for new hires/rehires, this will be the hire date or today's date, whichever is sooner. This date should be the same as the other person effective dates.

b. *Country: Defaults to USA

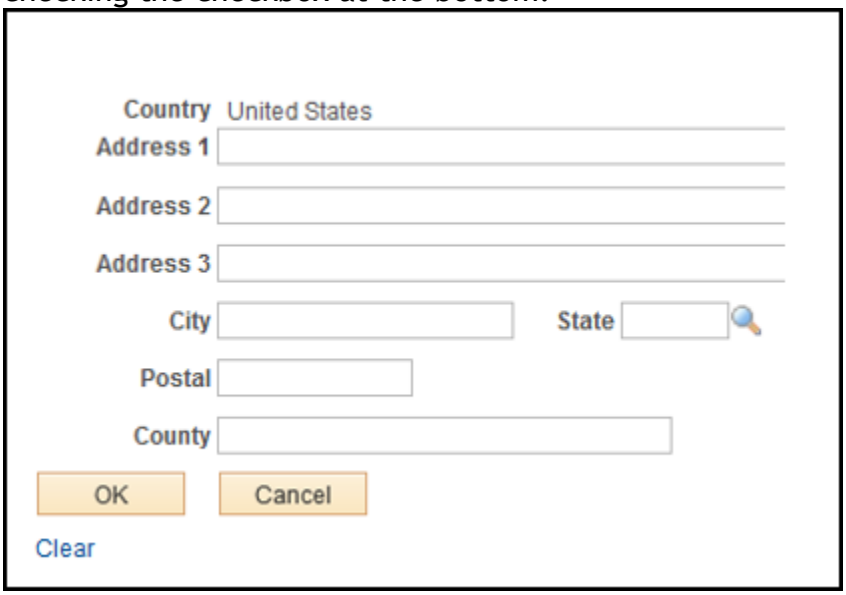
c. *Status: Defaults to A (for Active)

4. Click Add Address

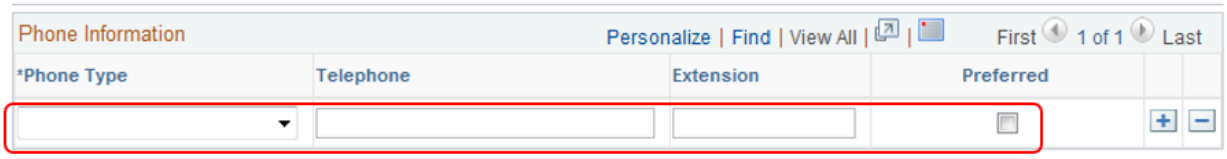


5. Enter applicable address information

PeopleSoft populates the Postal and County, and may correct address errors. If the address is auto-populating incorrectly, you can override the address validation by checking the checkbox at the bottom.



6. Click OK and OK again
7. Select a value from the Phone Type list
    a. Employee's Fax Phone: Work fax number
    b. Employee's Home Phone: Home phone number
    c. Employee's Other Phone: Any other phone number
    d. Employee's Personal Mobile Phone: Personal cell phone number
    e. Employee's Work Mobile Phone: Work cell phone number
    f. Employee's Work Phone: Work landline number. Can only be entered/modified by Agency HR Specialist.
8. Enter the Telephone number, Extension (if applicable), and select the Preferred checkbox where appropriate



9. Select a value from the Email Type list

a. Business: Work email. Can only be entered/modified by Agency HR Specialist. Remember to verify the business email address when transferring a person between agencies to ensure its accurate.
    b. Home: Personal email address
    c. Other: Any additional email address
10. Enter the Email Address and select the Preferred checkbox next to the Business Email Address

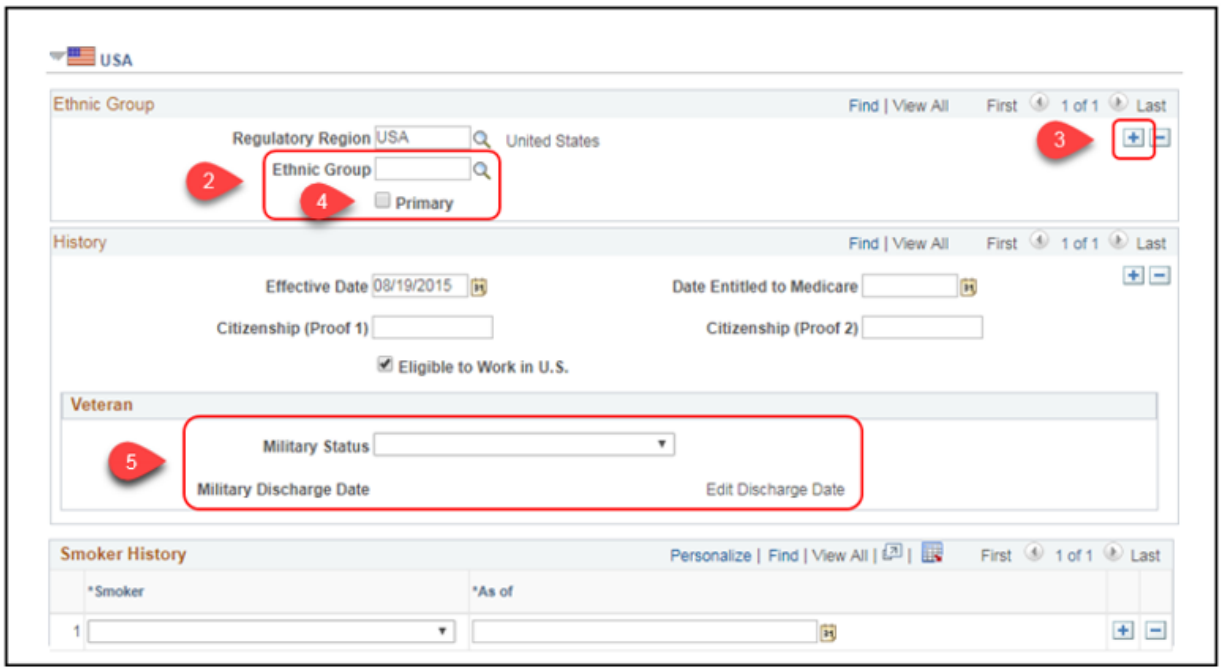


STEP 4: Enter Ethnicity and Veteran Status

1. Click the Regional tab



2. Enter or select *Ethnic Group
3. The employee may identify as more than one ethnic group. Select plus sign (+) to add additional Ethnic Groups.
4. Select the *Primary checkbox for the ethnic group that is considered primary.
5. Select an appropriate value from the Military Status list. Use the Edit Discharge Date link, if applicable.

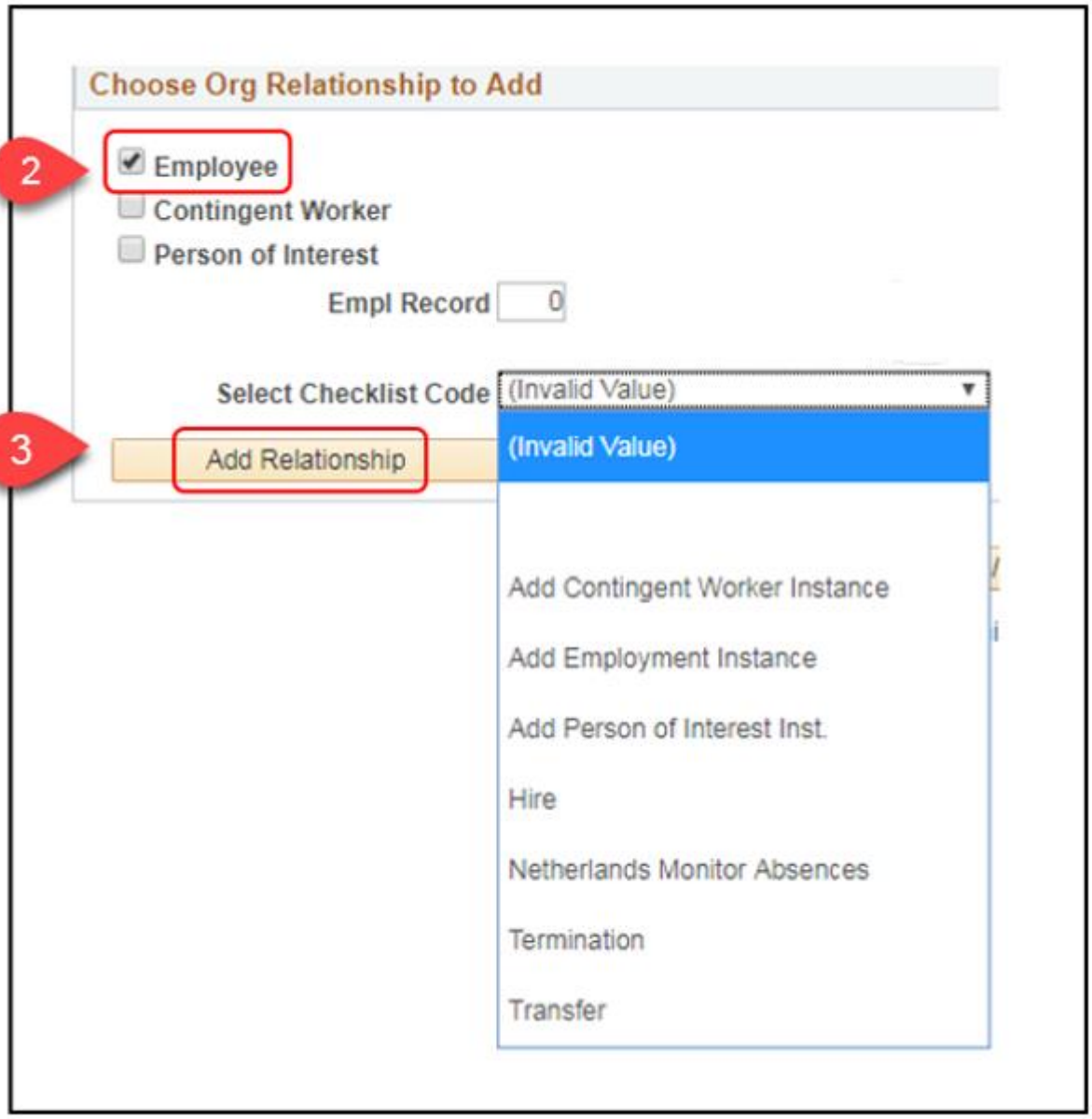


STEP 5: Assign an Organizational Relationship

1. Click the *Organizational Relationships tab



2. Select the Employee checkbox
3. Click Add Relationship



RESULTS: At this point, Personal Data is complete. You will automatically be redirected to the Job Data page at the Work Location tab to continue the new hire process. If you do not complete Job Data at this time you will nee to Add Employment Instance to complete the new hire process.

HR - Enter Job Data

Citation: http://docs.legis.wisconsin.gov/code/admin_code/er/18
Role: Agency HR Specialist



DO NOT CLICK SAVE UNTIL ALL FIELDS IN ALL OF THE TABS AND SECTIONS HAVE BEEN ENTERED

STEP 1: Enter Work Location data. (If entering a Rehire, begin here by first navigating to the Job Data page: **Main Menu > Workforce Administration > Job Information > Job Data**)

1. On the Work Location tab, enter the *Effective Date. This is the effective date of the hire/rehire.
2. The *Action list option defaults to Hire (use Rehire, if appropriate)



The Action of Hire should only be used in two situations. (1) The first time a person is entered into PeopleSoft; or (2) when an employee is hired into additional employment instances (i.e. a secondary position). Even if the person is a long-time state employee, you would still use this action to add/hire the employee in PeopleSoft for the 1st time. A "Rehire" Action/Action Reason is used for employees who were previously employees in PeopleSoft.

3. Select an appropriate value from the Reason list
    a. The reason is used to identify the type of hire. There are three (3) Hire Action Reasons: The below table displays the available new hire or rehire Action/Action Reason options and status results of each.
    b. If an employee is hired from another state payroll center (ex. UW, UWHC, WHEDA…), a Hire from Affiliate action reason should be used.



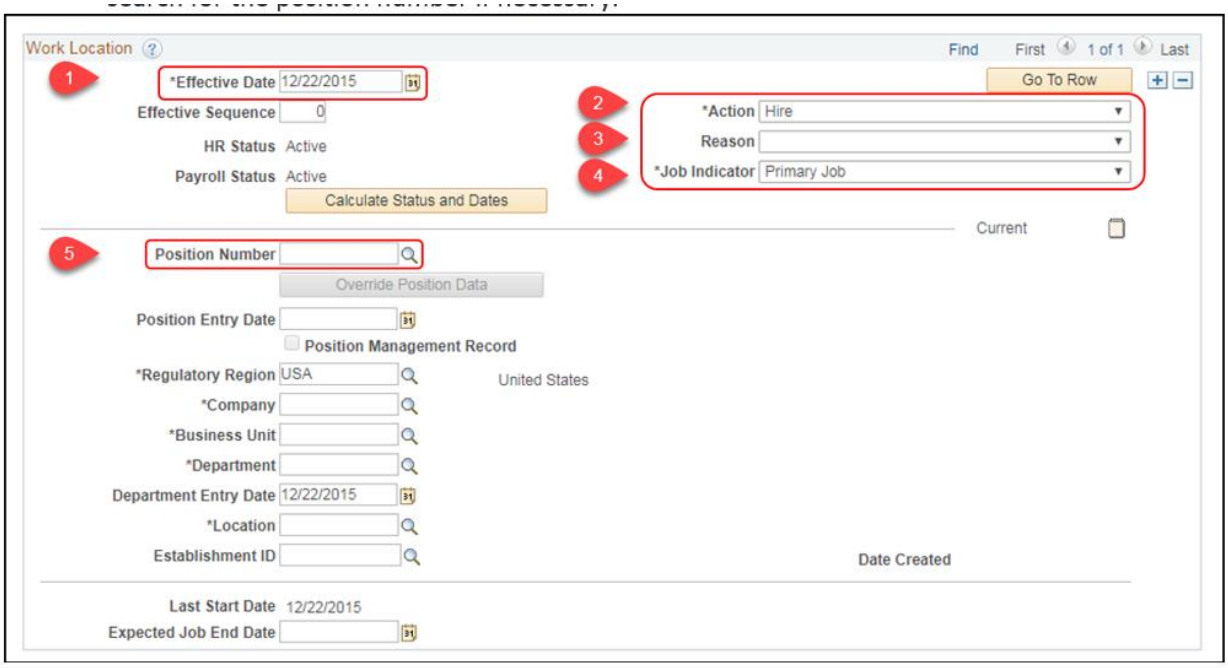
Action and Action reason drive the population of HR Status, Payroll Status and Benefit Employee Status. You must enter both an Action AND Reason.
For a full list of Action/Reasons, see 5.2 Action/Reason .

4. Select the *Job Indicator



If an employee only has one job, that job will default to the primary job. If an employee has two (2) or more jobs, you need to indicate which is primary and which is secondary job. This is in addition to the empl record number.

5. Enter *Position Number (required field for employees in position numbers). Use the Lookup Icon to the right to search for the position number if necessary.



6. Once the position number is entered, the following job data fields auto populate from position data : *Position Entry Date, *Regulatory Region, *Company, *Business Unit, *Department, *Department Entry Date, *Location

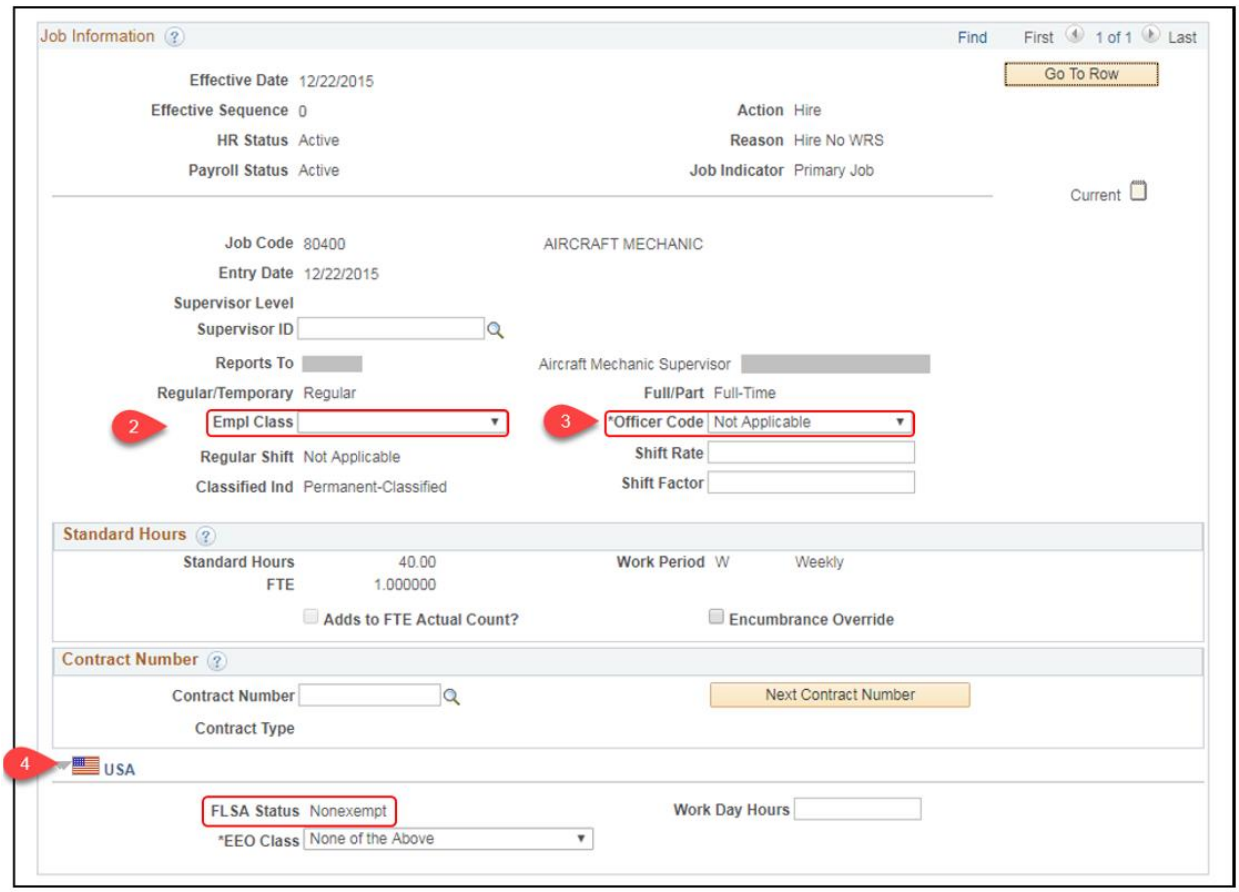
STEP 2: Enter Job Information data

1. Click on the Job Information tab



2. Select the employee type from the *Empl Class list
3. Select a value from the *Officer Code list. This is only used for employees with Career Executive Status.

4. Click on the USA Flag to view the *FLSA Status that populated from the position data. If this information is incorrect, it must be updated on the position (submit a STAR Support Ticket).



5. The following fields default from position data and should not be updated on job data: *Job Code, Supervisor Level (if a supervisor position), *Reports to, *Regular/Temporary, *Full/Part, *Regular Shift, *Classified Indicator, *FTE (zero for LTE), and *FLSA Status. If any of the information that came in from the position is incorrect, do NOT update the information on Job Data. You must submit a STAR Support Ticket to request corrections to the position once it's filled.

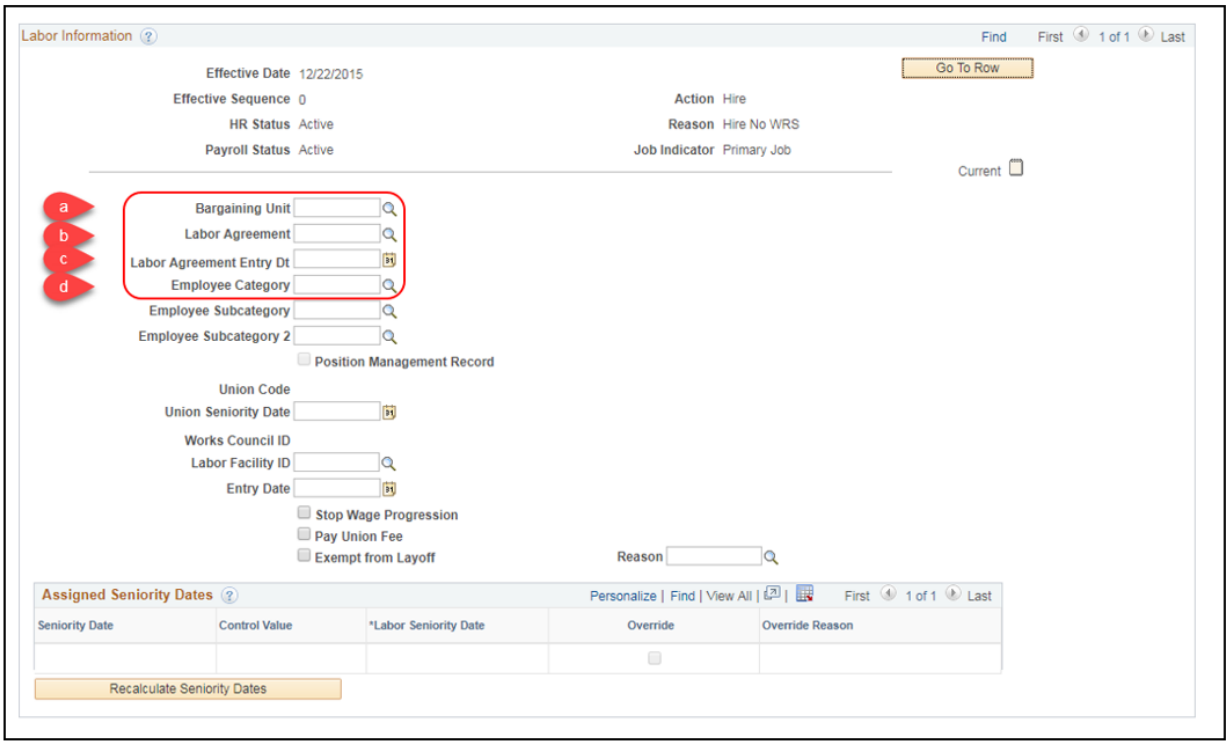
STEP 3: Enter Job Labor data

1. Click on the Job Labor tab



2. Enter the following information:
   a. *Bargaining Unit: Use the pay schedule

b. *Labor Agreement: Use the pay schedule
c. *Labor Agreement Entry Dt: Use the hire date (this date is not used but must be completed)
d. *Employee Category: Enter the Employing Unit

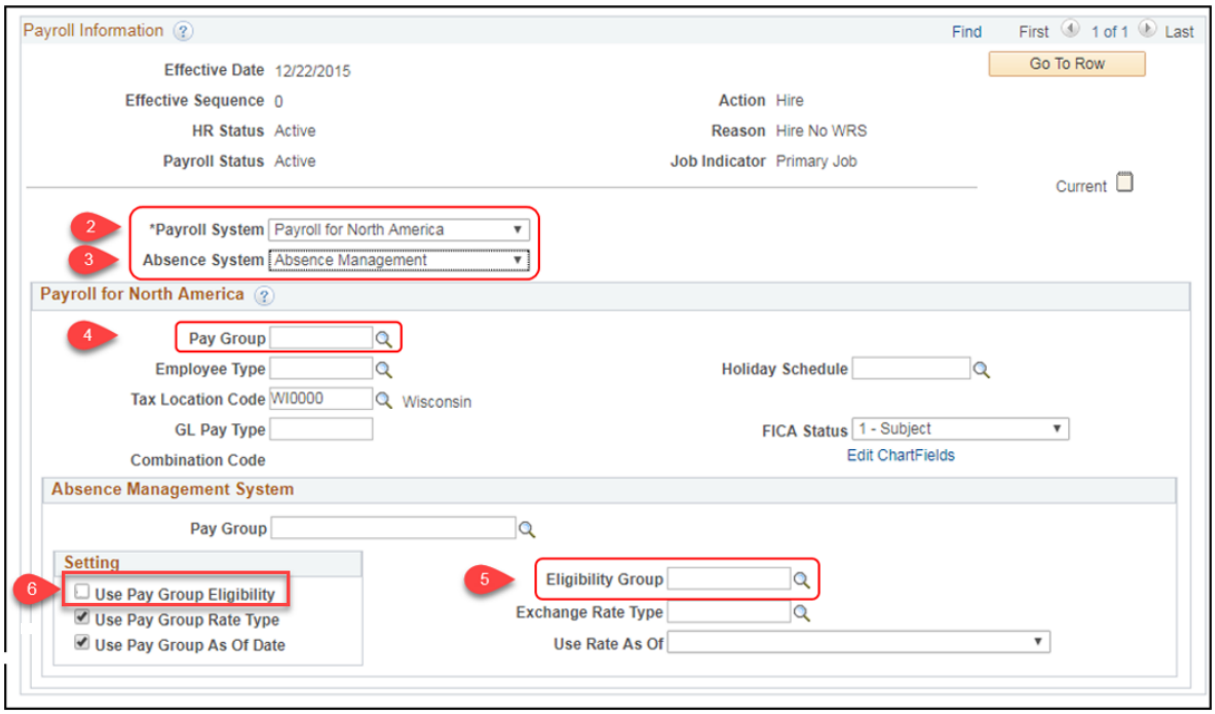


STEP 4: Enter Payroll data

1. Click on the Payroll tab



2. Select Payroll for North America from the *Payroll System list
3. Select Absence Management from the *Absence System list



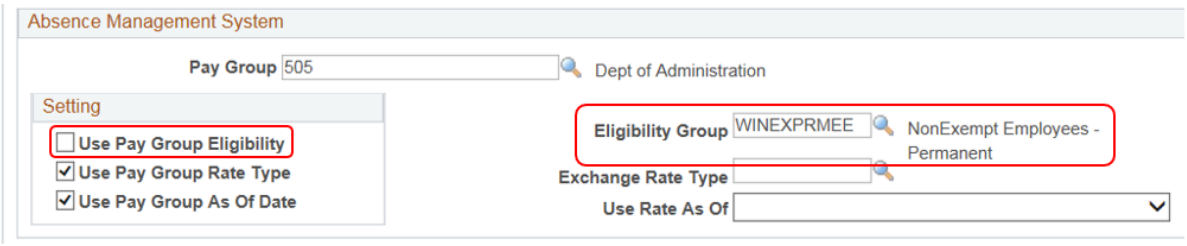
4. In the Payroll for North America section, enter your agency 3-digit code into the *Pay Group field
    a. *Employee Type and *Holiday Schedule populate when you tab out of the completed Pay Group field
    b. *Tax Location Code: populates from position data

5. In the Absence Management System section, enter or select the employee's *Eligibility Group for absence eligibility. The below table indicates the available Eligibility Group values.

Eligibility Group	Leave Program	Affected Employees
WICONOFFEE	Constitutional Office Leave Program	Constitutional Office Employees
WICRAFT100	CRAFT100 Employee Leave Program	CRAFT Employees (Pay Schedule 04)
WICRAFT140	CRAFT140 Employee Leave Program	CRAFT Employees who purchase add'l 40 hours of vacation (Pay Schedule 04)
WICRAFT180	CRAFT180 Employee Leave Program	CRAFT Employees who purchase add'l 80 hours of vacation (Pay Schedule 04)

WIDOTLETI	DOT Law Enforcement Program	State Patrol Troopers (65900) & Inspectors (65960) ONLY
WIEXPRJEE	Exempt Leave Project Program	Exempt Employees that have never obtained Permanent Status
WIEXPRMEE	Exempt Leave Perm Program	Exempt Permanent Employees
WIFCRS112	DMA FCRS112 Program	Fire/Crash Rescue Specialists (Class Codes: 66901/66902/66903) & Supervisors (66920) ONLY
WIFCRS96	DMA FCRS96 Program	Fire/Crash Rescue Specialists (Class Codes: 66901/66902/66903) & Supervisors (66920) ONLY
WINEXPRJEE	Non-Exempt Project Leave Program	Non-Exempt Employees that have never obtained Permanent Status
WINEXPRMEE	Non-Exempt Permanent Leave Program	Non-Exempt Permanent employees
WINOTELIG	Ineligible Leave Program	LTE's (Classified & Unclassified), Elective, National Guard, Board/Commission Members, VISTA Service Corps and other Non-Employee groups
WISEASONAL	SEASONAL Employee Leave Program	SEASONAL Employees
WIUCEXEE	Unclassified Exempt Leave Program	Unclassified Exempt Employees
WIUCNEXEE	Unclassified Non-Exempt Leave Program	Unclassified Non-Exempt Employees
WIWKNDNRS	Weekend Nurse Program	Nurse Clinician 2-Weekend (38303) and Nurse Clinician 3-Weekend (38863) ONLY
WITERMSICK	Layoff Sick Leave Program	Employees who are laid off and are eligible to use Sick Leave Credits to pay for Health Insurance Premiums

6. In the Setting sub-section, uncheck the Use Pay Group Eligibility checkbox

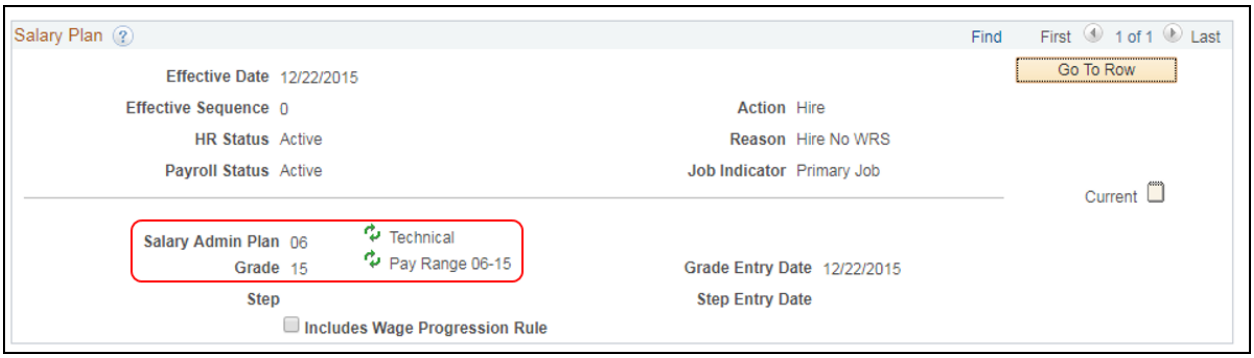


STEP 5: Review Salary Plan data

1. Click on the Salary Plan tab

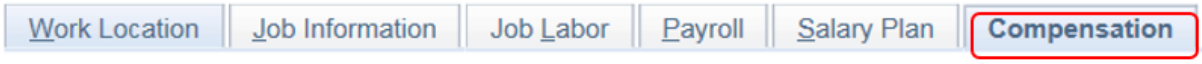


2. Validate the Salary Admin Plan and the Grade that defaults from the position. If this data is incorrect submit a STAR Support ticket requesting the correction.

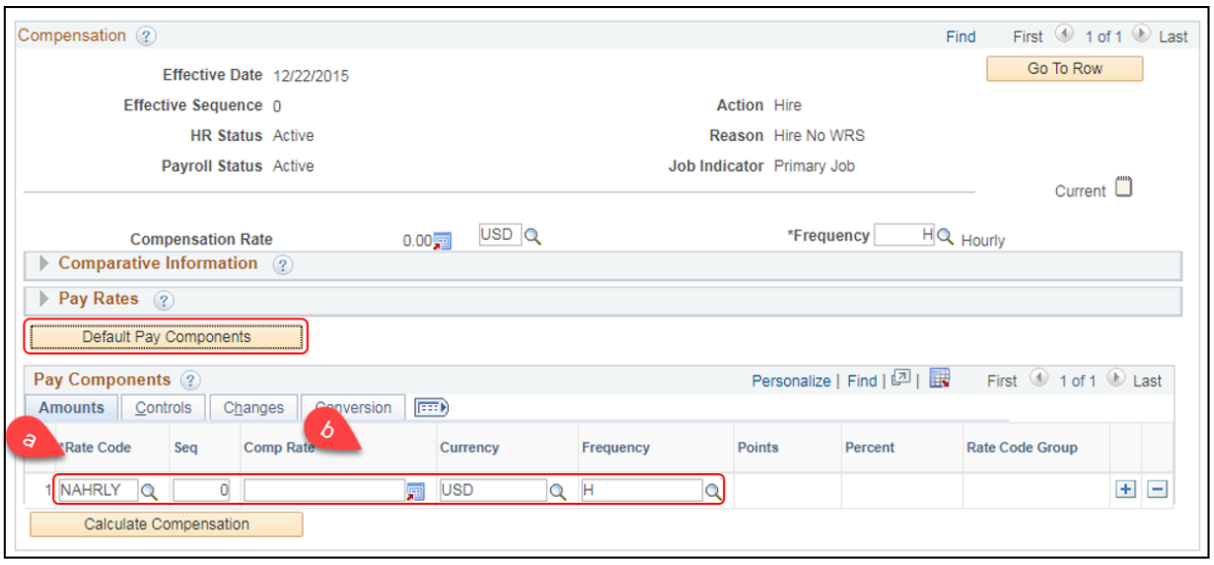


STEP 6: Enter Compensation data

1. Click on the Compensation tab

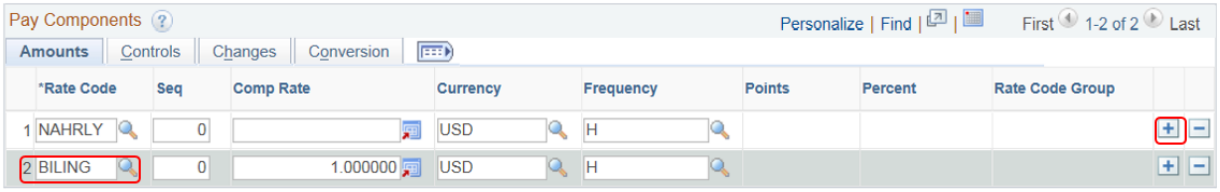


2. Click Default Pay Components
   a. This auto-populates the *Comp Rate Code of NAHRLY. This is the employee's base rate.
   b. Enter the employee's base rate in to the Comp Rate box.

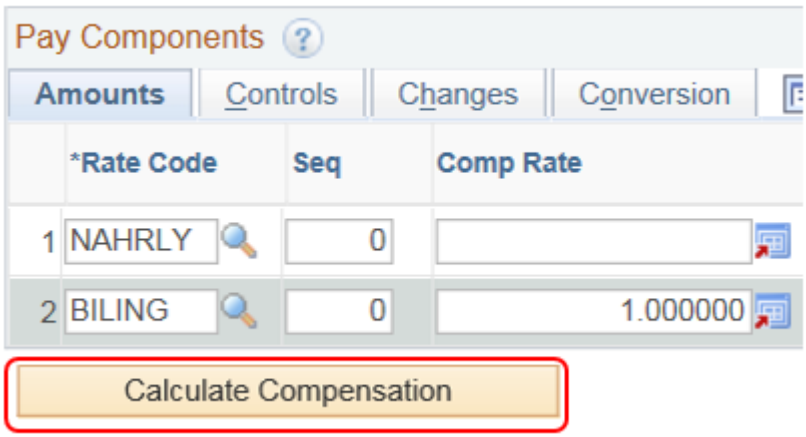


3. If the employee has any hourly add-ons, click Add a Row(+) to add additional rate codes

The Comp Rate auto populates based on the selected add-on Rate Code



4. Click Calculate Compensation



STEP 7: Enter Employment data

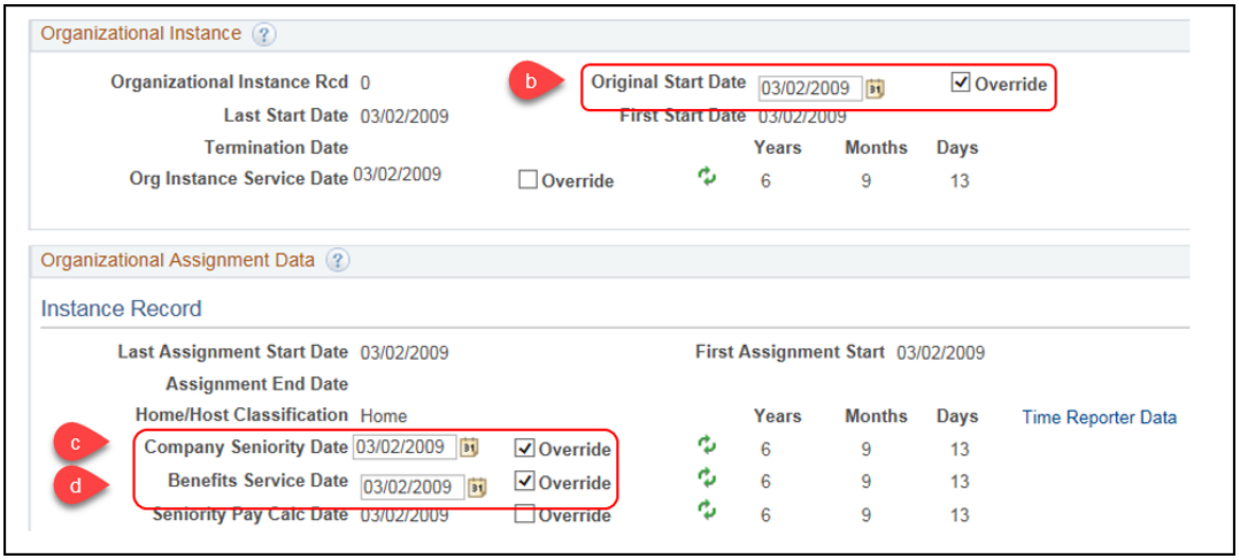
1. Click the Employment Data link at the bottom of the page



2. If necessary, click the Override checkbox for the following date fields and update appropriately
    a. Do NOT enter a Probation Date on this page. Probation is tracked in the Person Profile.
    b. *Original Start Date: The first date the employee began in a permanent position (State service)
        - Override for a Hire from Affiliate
    c. *Company Seniority Date: Synonymous with Adjusted Continuous Service Date. This date, in combination with the employee's FLSA status and FTE, drive the employee's vacation accrual rate. If this date needs to be overridden, check the override box and enter the correct date.
    d. *Benefits Service Date: Synonymous with WRS Begin Date (State WRS service only). Drives eligibility for employer contribution towards health insurance premium.
        - This date should be overridden for anyone who has prior WRS state service. You will typically override for a Hire or Rehire with Prior WRS and a Hire from Affiliate. The Agency Benefits Specialist should be able to provide this date to the person with the HR Specialist security role.
        - Verify this matches the hire date for Hire or Rehire No WRS
        - If prior WRS service is not accurately reflected and the system thinks that the employee has less than 2 months of WRS state service (6 months for an LTE), the employee's health insurance enrollment options will NOT be correct in eBenefits
        - This date must be correct when the HIR event is created. If it's updated at any time AFTER the date of initial entry, submit an SSO ticket so the HIR event can be reprocessed.



Seniority Pay Calc Date: This field is not used by the State



3. If entering Time and Labor data via Employment Data page on behalf of the time and labor role, refer to the next topic section: Enter Time and Labor Data.

STEP 8: Enter Benefits Program Participation data

1. Click the Benefits Program Participation Data link at the bottom of the screen



2. In the Benefits System field, select Benefits Administration
   a. Do NOT enter the ABBR on this page
   b. Do NOT change the Benefit Record number on this page
   c. Note the Benefits Employee Status displays here



3. Enter the appropriate values in the Elig Flds (Benefit Eligibility Fields)



a. The information on this page must be completed when the new Hire is entered to ensure that benefits eligibility is determined correctly. Work with the Agency Benefits Specialist to determine what values should be in these fields.
b. If the fields are not correct when the initial hire entry is done, NEVER add a new job row to correct the values. The values must be correct on the hire row in order for the HIR benefit event to prepare correctly. Submit an SSO ticket if any of the fields must be corrected after the initial hire entry is done.

- **A value must be entered in this field for ALL employees.**

- Enter the employee's Wisconsin Retirement System (WRS) Category or the code associated with why the employee is NOT eligible for the WRS.

Values if Eligible for the WRS		Values if NOT Eligible for the WRS	
Elig Field 1	**WRS Category**	**Elig Field 1**	**Definition**
30_GENERAL	30 - General	NOTELIG	Not Eligible Default – NEVER use for anyone with an employee relationship
31_COURTRP	31 – Court Reporter	NOTELIGLEG	For use by Legislature Only - Legislature-Annuitant Elected
32_EXECRET	32 - Executive	NOTELIG_90	Not WRS eligible - No WRS service before 7/1/11
33_PROTECT	33 - Protective (all except DNR, DOA, Justice, Military Affairs, DOT)	NOTELIG_91	Not WRS Eligible - Has WRS service before 7/1/11
33_PRTCTXO	Protective Justice, Military Affairs and DOA (as of 12-11-16)	NOTELIG_92	Rehired Annuitant termed before 7/2/13
33_PRTCTXX	33 – Protective (DNR, DOT – non-grandfathered)	NOTELIG_93	Rehired Annuitant termed after 7/1/13 and had WRS service prior to 7/1/11
33_DOTGRDF	33 – Protective (DOT Grandfathered)	NOTELIG_94	Rehired Annuitant termed after 7/1/13 and had NO WRS service prior to 7/1/11
40_TEACHER	40 - Teacher	BENELIG_95	In Milwaukee Retirement System – eligible for benefits but not covered by the WRS
41_EXECTEA	41 – Executive Teacher	*Note: If not eligible for WRS, must put correct "Not Eligible" code in Elg Fld 1 so the WRS Lookback Report works correctly.*	
42_EDUCSUP	42 – Educational Support Personnel		
46_EXECLEG	46 – Legislative Officers, Const Officers, DAs		

Note on Protectives: Agencies may change Protective Categories from year to year based on contribution rates. In 2016, DOA was covered by 33_PRTCTXX but moved to 33_PRTCTXO for 2017.

- **If the employee is eligible for the WRS, a value must be entered in this field at hire/rehire.**
- Enter the employee's Income Continuation Insurance (ICI) category and the plan for which the employee is eligible
- The value in Elg Fld 2 drives was ICI options are available for enrollment.
  - Eligible for Standard ICI if annual earnings < $64,000
  - Eligible for Supplemental ICI if annual earnings > $64,000
  - If the employee is new to state government, eligible for ICI Category 1.
  - If the employee is transferring from another state agency (transfer from affiliate), enter the Elg Fld value associated with the employee's ICI enrollment on the transfer record. If not enrolled in ICI, leave this field blank because the employee is not eligible to enroll in ICI at hire.
  - If the employee is returning to state government and reinstating sick leave balance, need to review sick leave balance and last ICI enrollment to determine correct value.

□□□□□□ If no value entered in this field, the option to enroll in ICI will NOT be available on the HIR event.

Elg Fld 2 Values

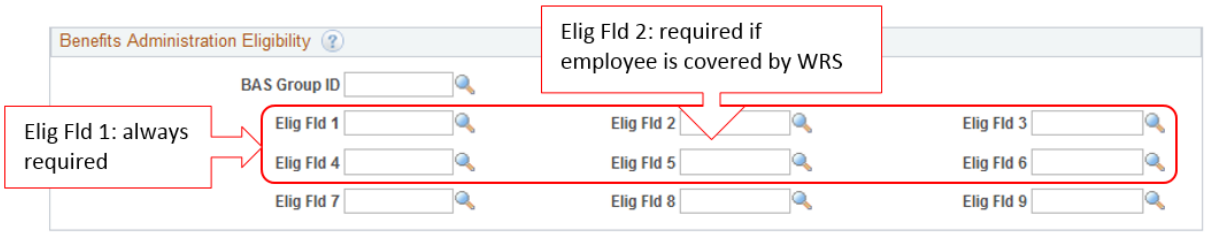
Standard ICI Only	Standard + Supplemental ICI
ICICATGRY1 - ICI Category 1	ICIBASSUP1 - ICI Category 1
ICICATGRY2 - ICI Category 2	ICIBASSUP2 – ICI Category 2
ICICATGRY3 - ICI Category 3	ICIBASSUP3 – ICI Category 3
ICICATGRY4 - ICI Category 4	ICIBASSUP4 – ICI Category 4
ICICATGRY5 - ICI Category 5	ICIBASSUP5 – ICI Category 5
ICICATGRY6 - ICI Category 6	ICIBASSUP6 – ICI Category 6

□□□□□□ This field is used for a variety of reasons. This field must be completed if:

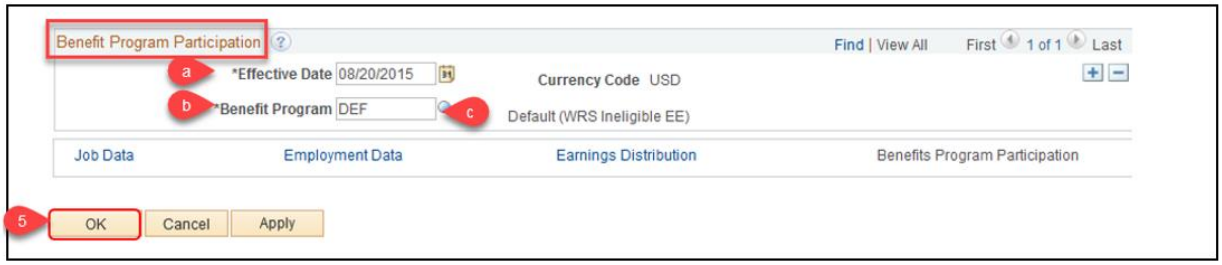
- The employee is a WRS-covered LTE; or
- The employee has a pre-tax premium waiver on file; or
- The employee is required to pay the full cost of health insurance because they are a craftsworker or have lost the employer contribution towards the premium due to leave of absence or layoff, or
- The employee is required to pay the less than half time rates health insurance premium

Elig Field 3	Definition
100EMPPAID	Employee pays 100% of health insurance premium – this must be entered for craftsworkers or employees no longer eligible for the employer contribution towards health insurance due to leave of absence or layoff. NOTE – **Do NOT use this for employees who elect early health insurance** before eligible for the employer contribution towards health insurance.
ALLPOSTTAX	This should ONLY be used for employees who file a pre-tax premium waiver (ET-2340). **This should NOT be entered for LTEs or for employees who cover a non-tax dependent**. If an employee is an LTE, insurance premiums will automatically be taken post-tax. If an employee covers a non-tax dependent on optional plans, the premium will automatically be taken post-tax.
LESSTHAN50	Use when employee must pay the less than half time rates for health insurance. You will need to enter this for all WRS-covered LTEs who have only 1 appointment or non-LTE employees who work less than 50%.
LTEFULLSGH	Use when WRS-covered LTE is eligible for the full employer contribution towards health insurance (employee has 2 or more concurrent LTE appointments and works at least 50%)

□□□ This field will typically remain blank for a new hire □□□□□ Used to track when employee offered coverage through ICI deferred enrollment.
□□□This field will typically remain blank for a new hire □□□□•□ Used to identify grandfathered employees enrolled in 50% SGL Supplemental Plan and/or have State Group Life or ICI disability premium waivers in effect



4. In the Benefit Program Participation section:
a. Effective Date: Do NOT enter a date in this field. It will default to the hire date.
   b. Benefit Program: Do NOT enter anything in this field
   c. For a new hire, when you are entering the job information for the first time, the employee will be in the DEF (default) benefit program
   d. Once all job data is entered and Benefits Administration analyzes all benefits eligibility information on the job record, the system will assign the employee to the correct benefit program
5. Click OK

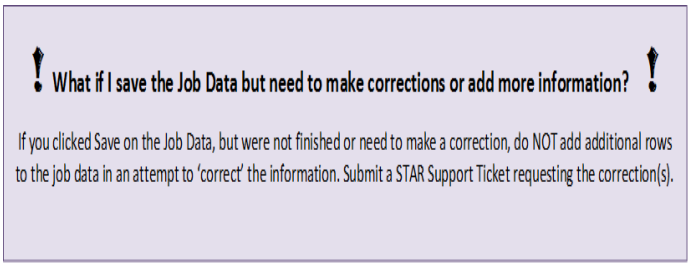


Note: At this point, you are taken back to the Organizational Relationship page. This indicates the Personal Data and Job Data for the employment instance is complete. Be sure to write down the employee ID number.

6. Click Save
7. Be sure to record the Empl ID created by PeopleSoft

RESULT: The new hire now has Personal and Job Data in PeopleSoft and is assigned an Empl ID

1. Federal and State Tax records and a Tax distribution record are automatically added to the employee's records. These need to be verified and updated.
2. Overnight batch processes run
    a. The Hire/Rehire Action creates a HIR benefits event. If a Hire from Affiliate action reason is used, a HFA benefits event is created.
    b. If the employee is eligible for the WRS, employee will be automatically enrolled in the WRS (based on the value in Elg Fld 1). If the job entry is done before the hire date, the WRS enrollment will automatically occur the night of the hire date.
    c. On the day after you enter a hire or rehire, the employee's eBenefits New Hire event will open in employee self-service. The HIR event is also open to the agency if paper application entry is necessary.
    d. Note: If a Hire from Affiliate Action/Action reason is used, a self-service benefits event will NOT open because the employee is limited to the benefits that the employee had at the former state payroll center (plus any benefits that weren't offered at the former payroll center). In this case, the employee will be required to submit paper benefit applications that will need to be entered by the Benefits Specialist on the HFA event.



HR - Add A Person Profile

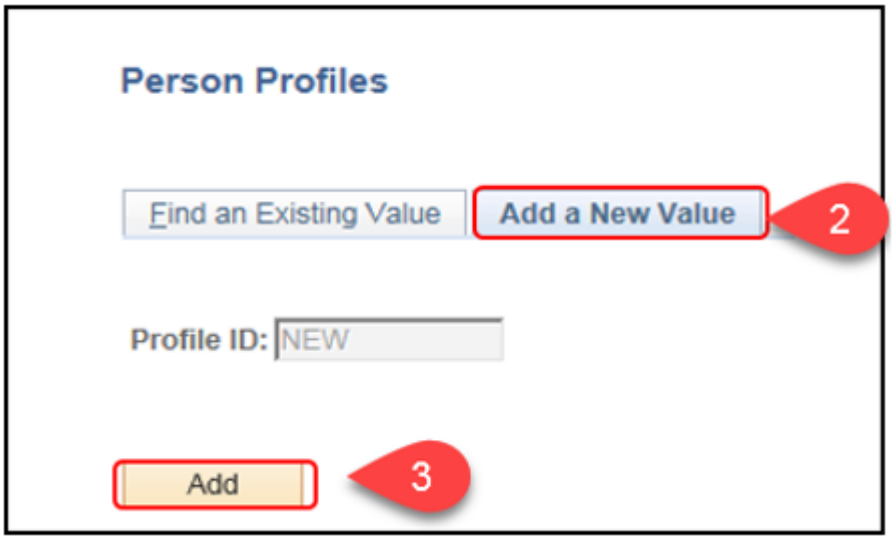
Role: Agency HR Specialist

Although the person profile is not part of the Person or Job Data, it is important the Probation, Veteran Disability Status, and Disability/Severe Disability be entered at the time of hire.

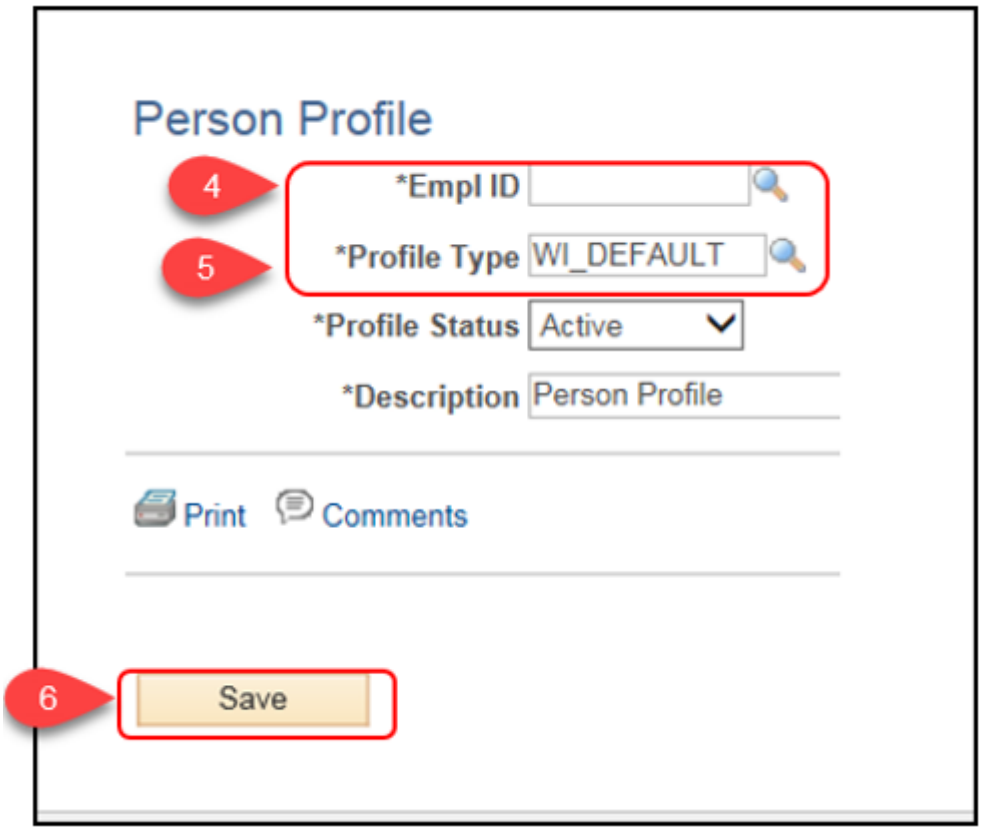
Note that information on Tests, Exam and Assessment, Background Check, Vaccinations, License, Certification, and Registration are at the discretion of the individual agency.

STEP 1: Navigate to and create a new Person Profile page for the new hire employee

1. Navigation: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
2. Click the Add a New Value tab
3. Click Add



4. Enter or select the Empl ID of the new hire
5. Enter or select Profile Type of WI_DEFAULT
6. Click Save



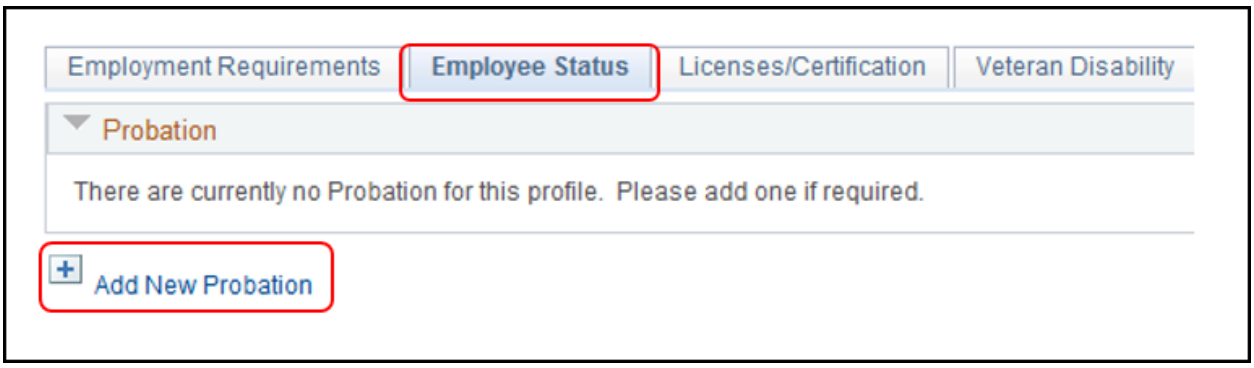
7. Continue with Step 2 for the appropriate situation below – Add a Probation, Enter a Veteran Disability, or Enter a Disability/Severe Disability

Add a Probation

Citation: http://docs.legis.wisconsin.gov/code/admin_code/er_mrs/13

STEP 2: Enter Probation data

1. Click the Employee Status tab
2. Click (+) Add New Probation



3. Enter the following fields:
    a. Effective Date: Probation start date

b. Probation: WIPROBATION

c. Position: Position number associated with the probationary period. Some employees may have more than one employment instance, so this ties the position to the probationary period

d. Probation Type: Select the appropriate type of probation

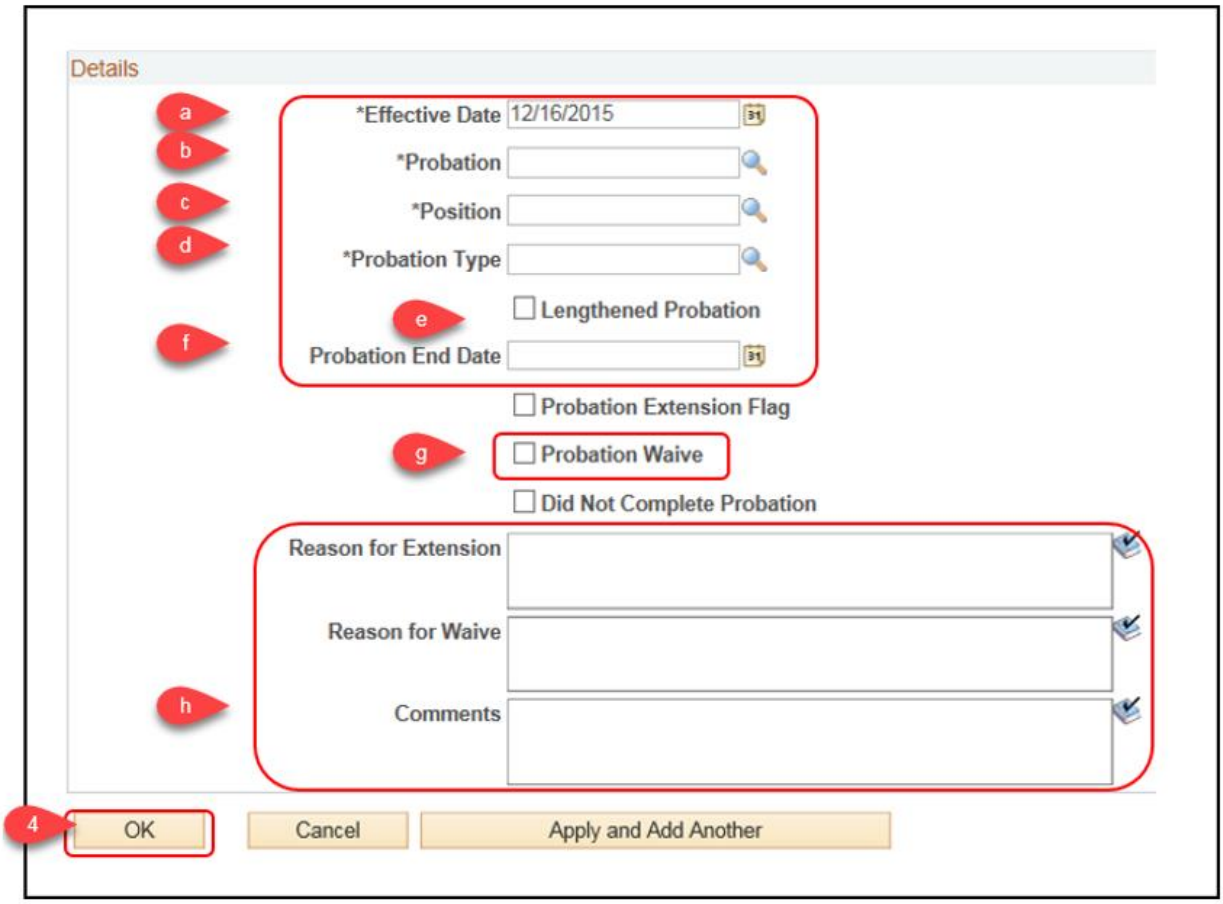
e. Lengthened Probation: Use this check box if the probationary period has been approved to be a lengthened probationary period through DPM

f. Probation End Date: Date of the last day of the probationary period

g. Select Probation Waive if applicable, and enter Reason for Waive

h. Comments: Enter comments related to the probationary period

4. Click OK



Enter a Veteran Disability

STEP 3: Enter Veteran Disability data

1. Click the Veteran Disability tab
2. Click (+) Add New Veteran Disability



3. Enter or select the appropriate Disabled Veteran or Spouse value

4. Enter or select the appropriate Disability Type
5. Click OK



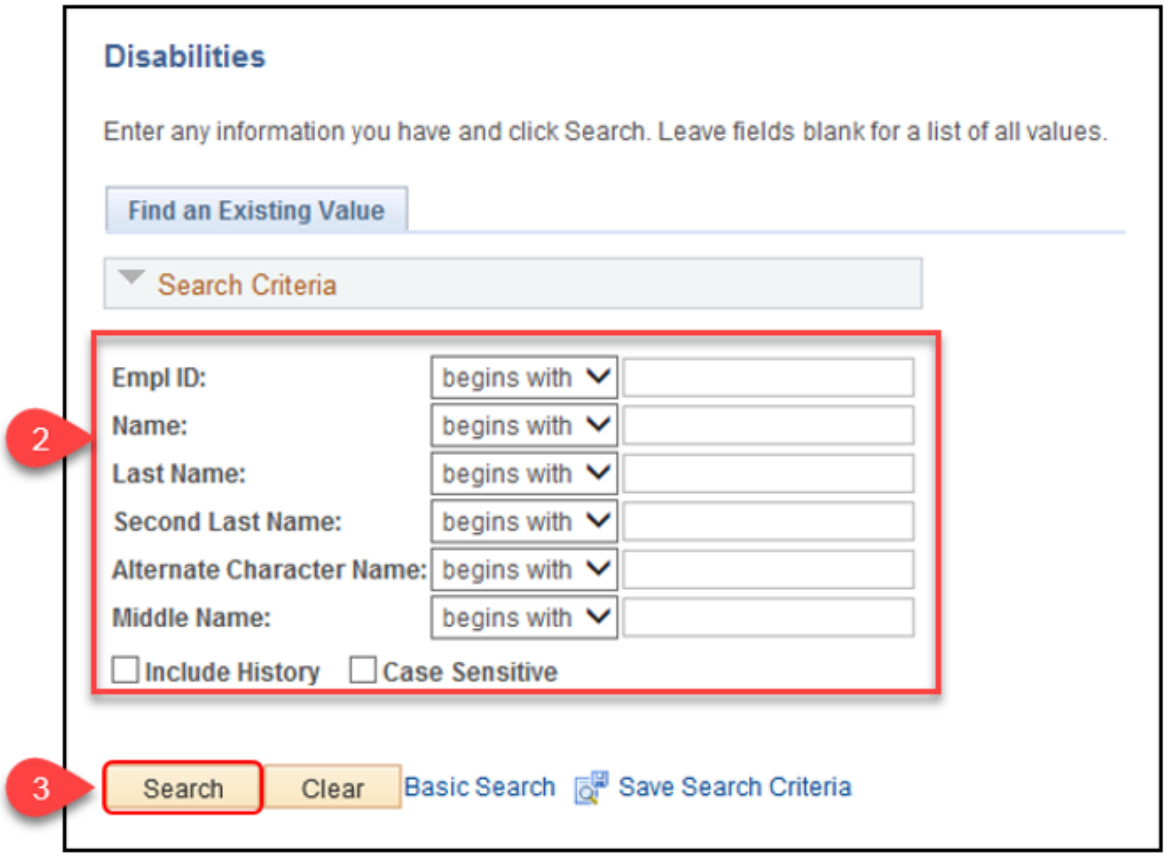
Enter a Severe Disability

The Disability flag needs to be checked if disabled. If severely disabled, disability flag needs to be checked before inputting information about severe disability.

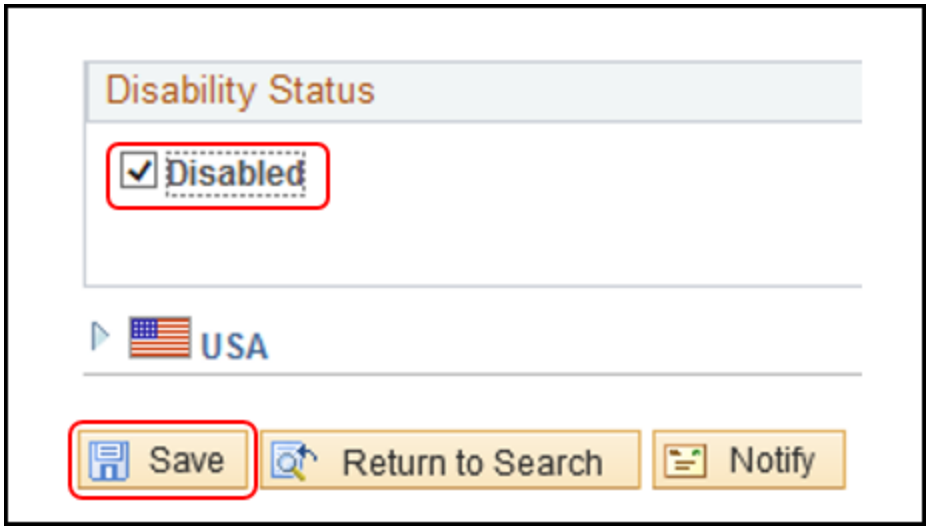
Note: The Disability flag is set outside of the Person Profile pages

STEP 4: Select the Disability flag

1. Navigation: Main Menu > Workforce Administration > Personal Information > Disability > Disabilities
2. Enter the desired search criteria
3. Click Search

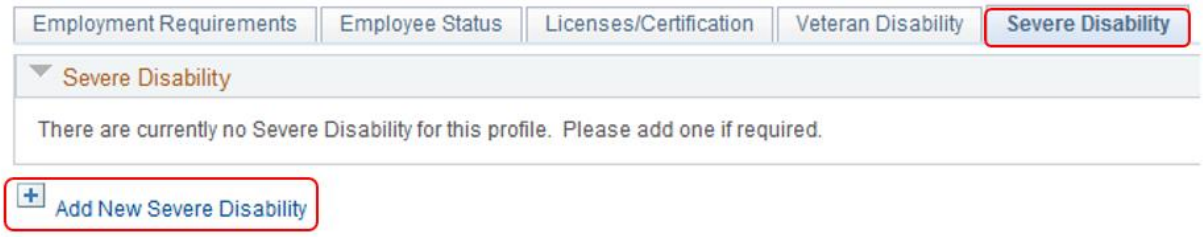


4. If multiple employees result, click the desired employee from the Search Results list
5. Select the Disabled checkbox
6. Click Save



STEP 5: Enter Severe Disability data

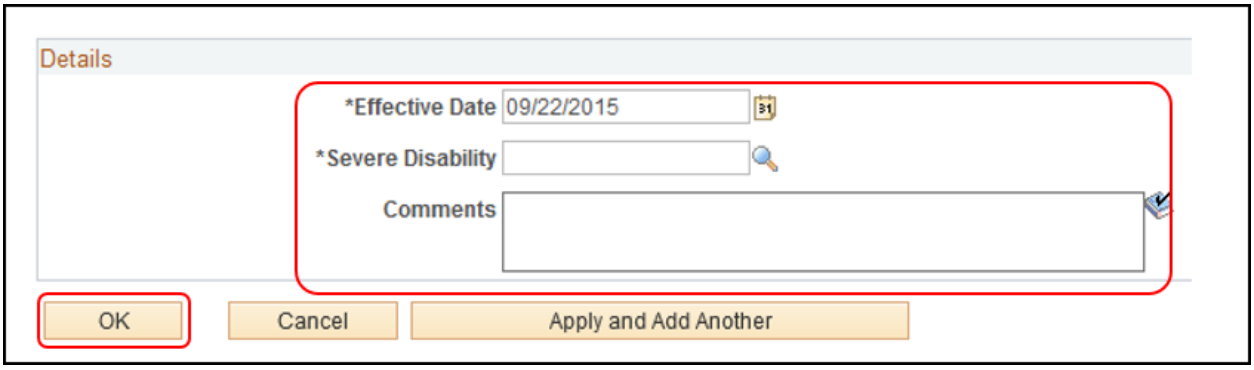
1. Navigation: **Main Menu > Workforce Administration > Profile Management > Profiles > Person Profiles**
2. Click the Severe Disability tab
3. Click (+) Add New Severe Disability



4. Enter the following fields:
    a. Enter the Effective Date

b. Severe Disability: Enter or select 2
c. Enter any Comments

5. Click OK
6. Click Save



Time And Labor - Enter Time And Labor Data

Role: Time and Labor Specialist
Alternate Role: Agency HR Specialist
Trigger for Time and Labor Specialist Role: Wild card search on the Create Time Reporter Data page (discussed below)
Trigger for HR Specialist Role: New hire process – part of the Employment Data page

Time and Labor Data can be entered at by the Time and Labor Specialist role after the employee's Personal and Job Data have been established. Or the Time and Labor Data can be input by the HR Specialist Role during Job Data entry via the Employment Data page. If entered by the HR Specialist, be sure to obtain the proper values from the Time and Labor Specialist. The employee will not be able to enter time until Time & Labor data is entered.

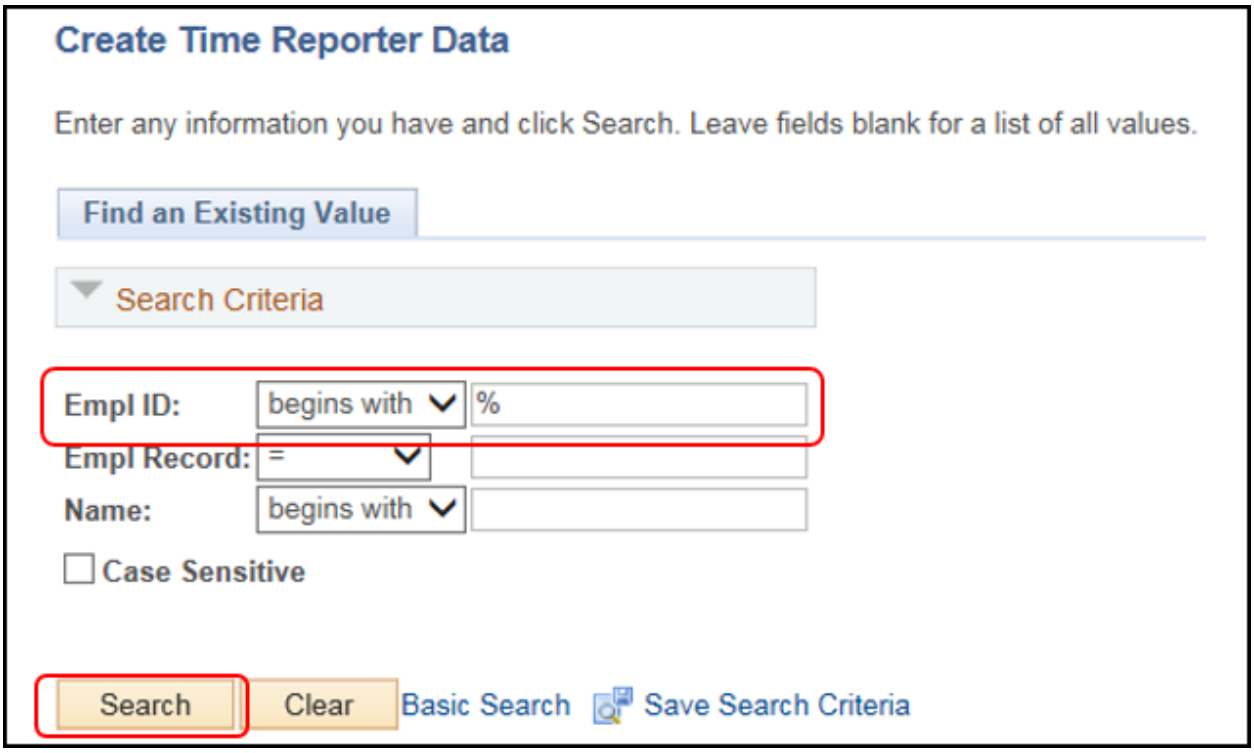
STEP 1: **Time and Labor Specialist:** Navigate to the Create Time Reporter Data page and locate the new hire/rehire employee

1. Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Create Time Reporter Data**
2. Enter the desired search criteria



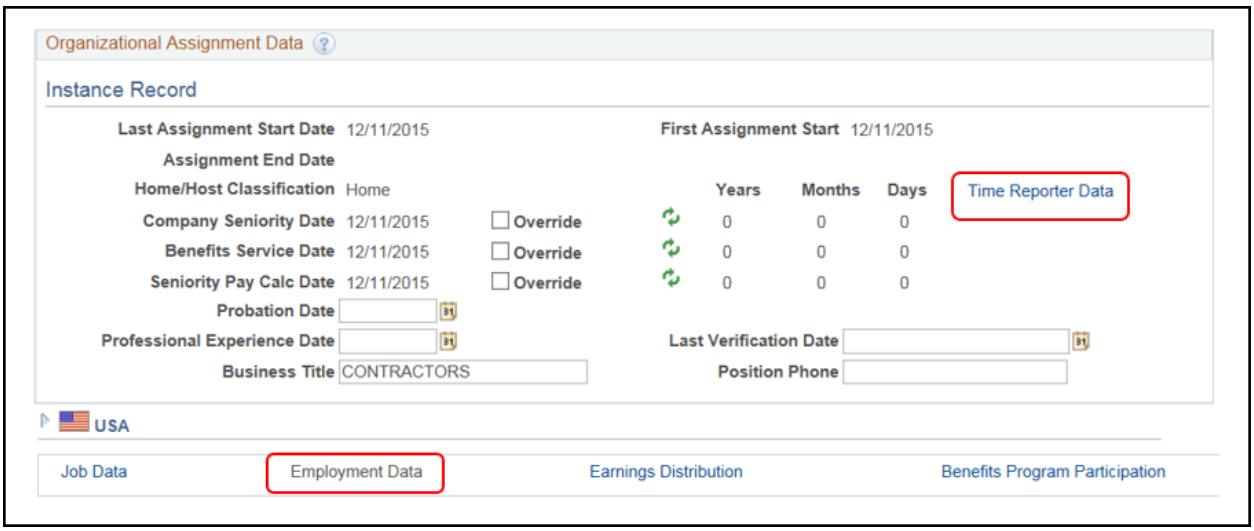
To search for all employees who have not been set up with Time and Labor data, enter a wild card (%) into the Empl ID field

3. Click Search



If multiple employees result, click the desired employee from the Search Results list

STEP 2: If entered by the Agency HR Specialist: Click the Time Reporter Data link on the Employment Data page



STEP 3: (Both roles follow the same steps at this point) Enter the Time Reporter Data

1. Enter the following fields: (For more information on Time Reporter Data, reference R2 Configuration Data SharePoint documents)

a. Effective Date: The date the time reporter data and associated plans are effective. For a new hire/rehire, this should ALWAYS be the hire date.

b. Status: When an employee is enrolled, the time reporting status is Active by default

c. Time Reporter Type: Select either Elapsed Time Reporter or Punch Time Reporter
   - Select Elapsed Time Reporters for Exception Reporters

d. Elapsed Time Template or Punch Time Template: Enter whichever field is appropriate based on the Time Reporter Type

e. Time Period ID: Select PSDAY for Positive Time Reporters; Select WISBIWEEK for Exception Time Reporters

f. Workgroup: Identifies the default TRC program, rule program, holiday schedule, time reporting period, and other information PeopleSoft uses when processing reported time
   - For Exception Reporters, select WISEXCEPT (Approval Required) or WISEXCEPT1 (Approval Not Required)

g. Taskgroup: Identifies the default task template, task profile and time reporting templates that PeopleSoft uses when collecting and processing reported time

h. Rule Element 1-4: Assign up to four rule elements as needed
   - Rule Element 1: Used to indicate how Overtime is compensated

   Available Values:

    - CASH – Cash Payout for Overtime
    - COMBO – Combination of Cash and Comp Time for Overtime
    - COMP – Comp Time for Overtime
- Rule Element 2: D – Gives exempt employees and LTEs differential pay
- Rule Element 3: Responsibilities pay

  Available Values:

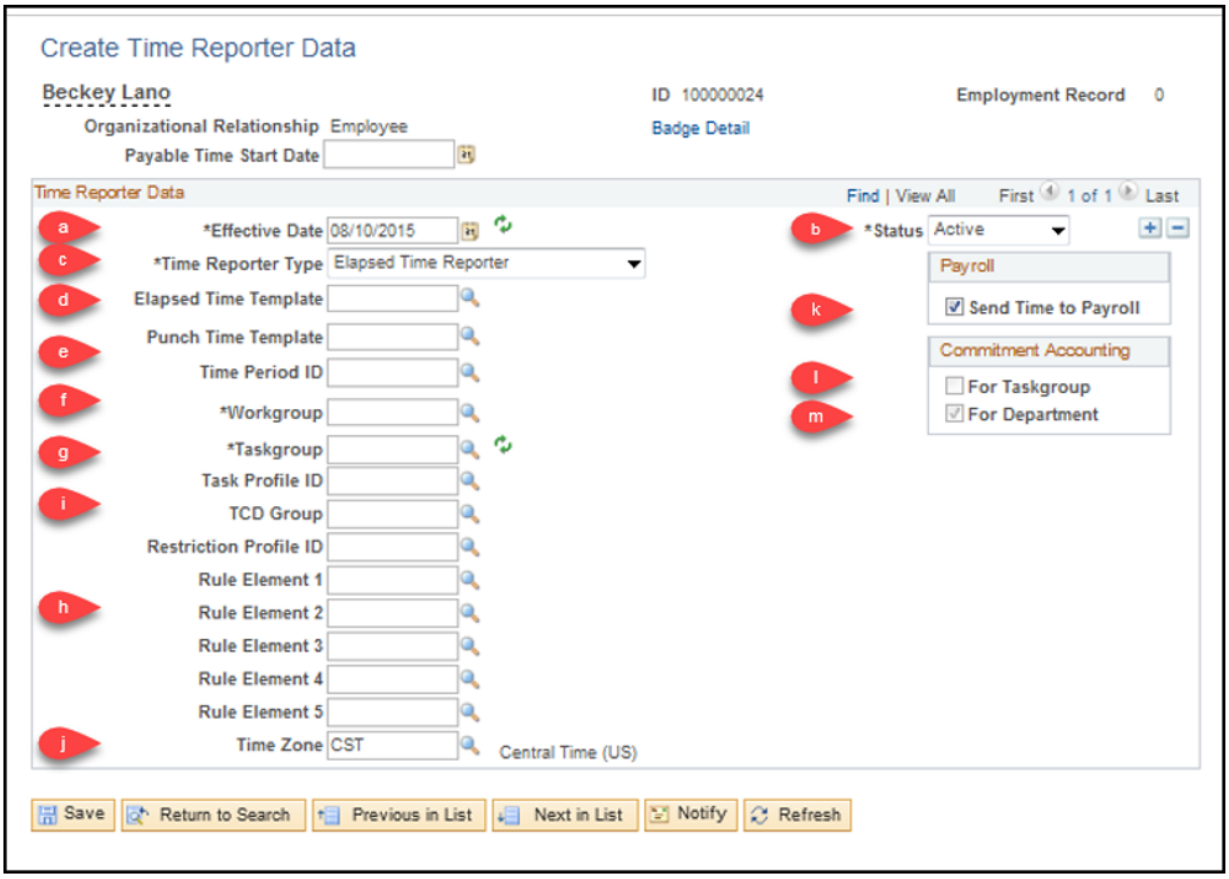
    - P – Permanent PM Shift Responsibility
    - T – Temporary PM Shift Responsibility
- Rule Element 4: Used to indicate how Holiday Overtime is compensated

  Available Values:

    - CASH – Cash Payout for Holiday Overtime
    - COMBO – Combination of Cash and Comp Time for Holiday Overtime
    - COMP – Comp Time for Holiday Overtime

a. TCD Group: If the employee uses a TCD, such as a time clock or badge scanner to report time, select the appropriate TCD group
b. Time Zone: CST
c. Send Time to Payroll: Check
d. For Taskgroup: Indicates the employee's Taskgroup is defined for commitment accounting
e. For Department: Indicates the employee's department is defined for commitment accounting

2. Click Save



RESULTS: The employee is now enrolled as a time reporter and is immediately effective. An overnight batch runs prior to the employee being assigned a schedule.

Time And Labor - Assign A Schedule

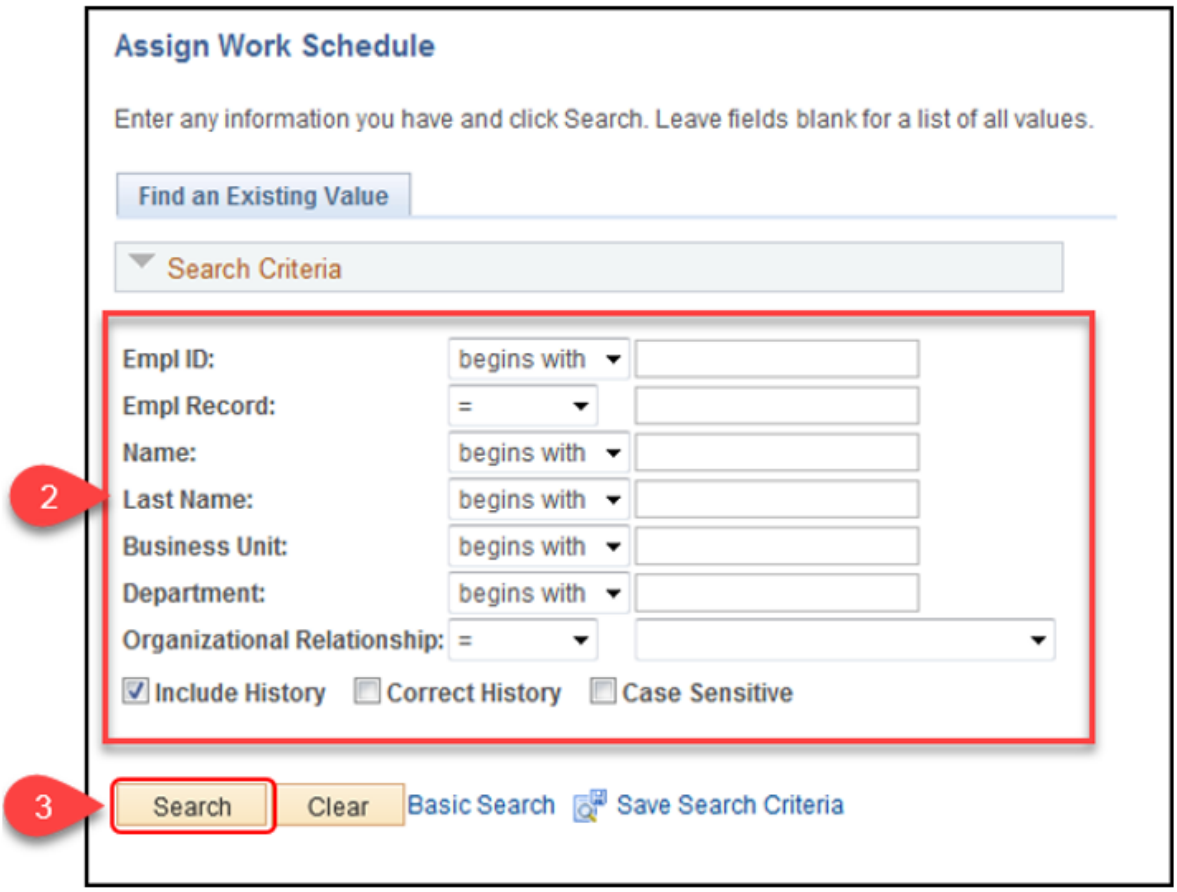
Role: Time and Labor Specialist
Trigger: Notification of a new hire/rehire from HR

The employee should be assigned a schedule the day after Time and Labor data was entered and the nightly batch process was run. The employee will NOT be able to enter any absences until assigned a schedule.

Note: Schedules assigned in Time and Labor are for the purpose of tracking absences only.

STEP 1: Navigate to the Assign Work Schedule page and locate the desired new hire/rehire employee

1. Navigation: Main Menu > Time and Labor > Enroll Time Reporters > Assign Work Schedule
2. Enter the desired search criteria



3. Click Search
4. If multiple employees result, click the desired employee from the Search Results list

STEP 2: Enter schedule data

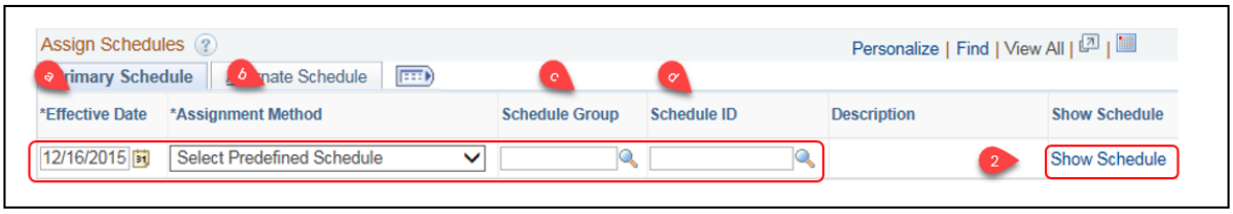
1. Enter the following fields:
    a. Effective Date: The effective date of the assigned schedule. Cannot be older than today's date. For a new hire/rehire, the effective date MUST be the date of hire.
    b. Assignment Method: Select Predefined Schedule

        - After Select Predefined Schedule is selected, the Schedule Group and Schedule ID fields activate

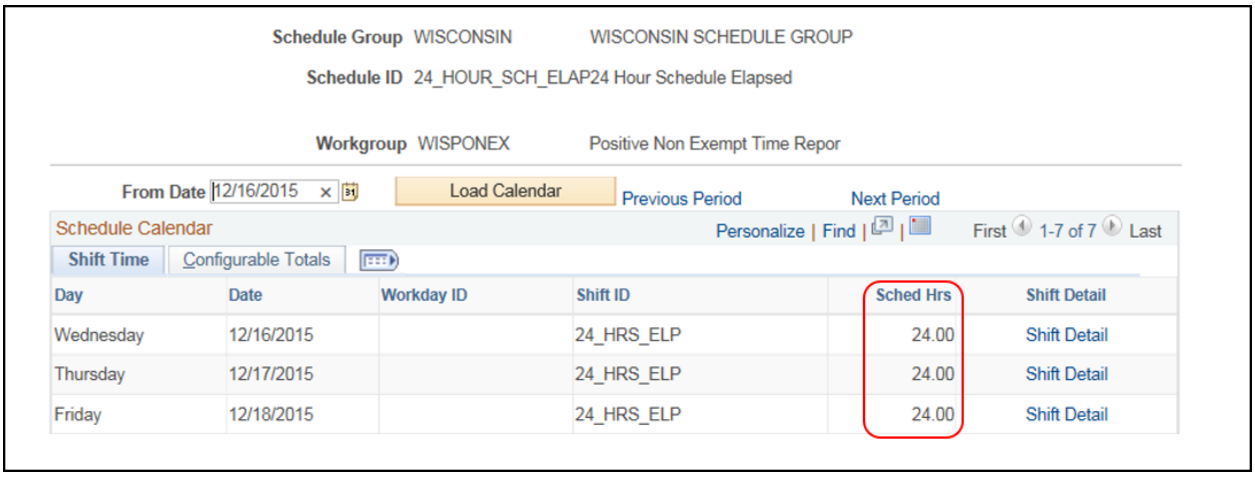
- Refer to the SCHEDULES spreadsheet on STAR Connection for details

c. Schedule Group. Select the appropriate value
d. Schedule ID: Select the appropriate value

2. Click Show Schedule to open the Schedule Calendar window



3. Review the employee's Sched Hrs



4. Click OK
5. Click Save

RESULTS: The employee is now assigned a schedule for tracking absences.

Payroll - Verify/Update Federal And State Tax Data

Role: Agency Payroll Specialist

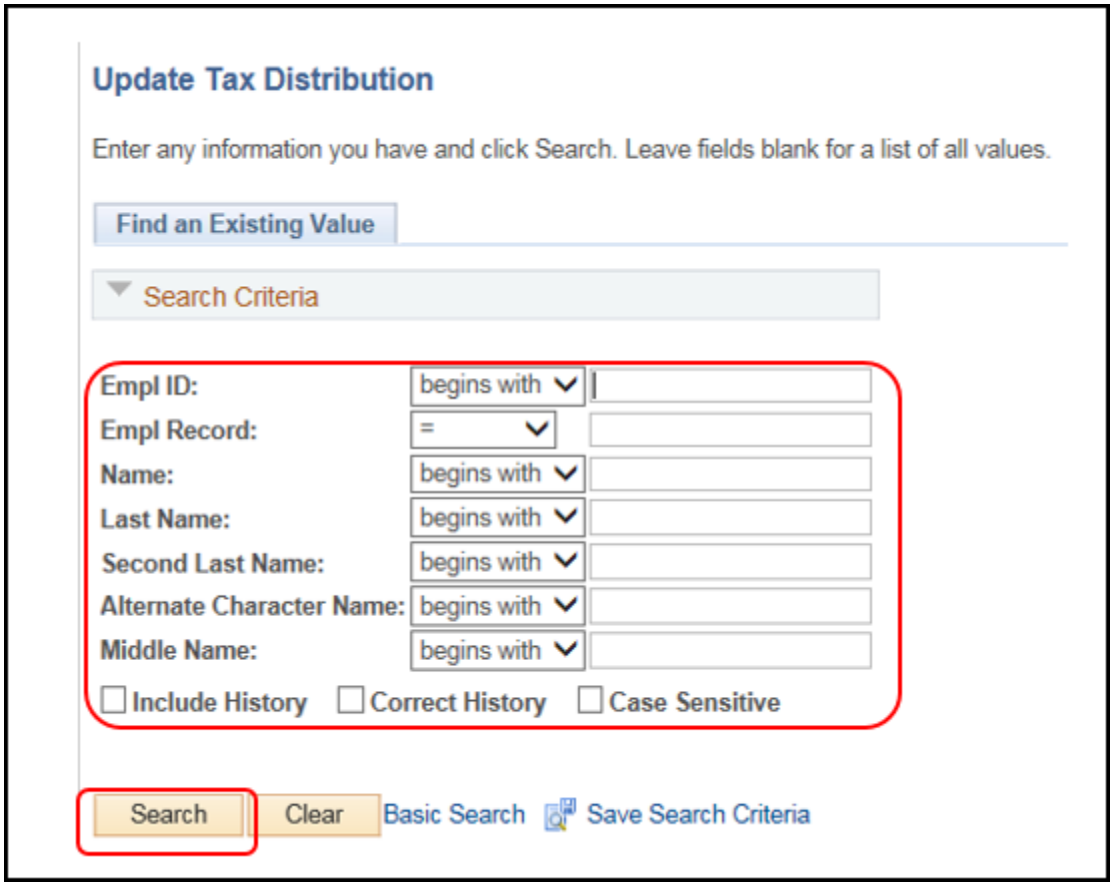
PeopleSoft automatically sets up an employee's tax data after the Personal and Job Data are completed. The Federal and State Tax data rows are added as a default

Marital Status of Single and Withholding Allowances of 0. The payroll specialist should verify the records were created and update to the appropriate values.

Federal tax data is available for the employee to manage through ePay Self Service. Best practice is to have the employee input the proper updates.
State tax data can only be updated by the Agency Payroll Specialist and should be completed at time of hire. Note that multiple state tax records are supported.

STEP 1: Navigate to the Tax Data pages and locate the desired new hire/rehire employee

1. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data**
2. Enter the desired search criteria in the Find an Existing Value tab
3. Select Search



4. If multiple employees result, click the desired employee from the Search Results list

STEP 2: Make required updates to the Federal Tax Data

1. Click Add a Row (+)

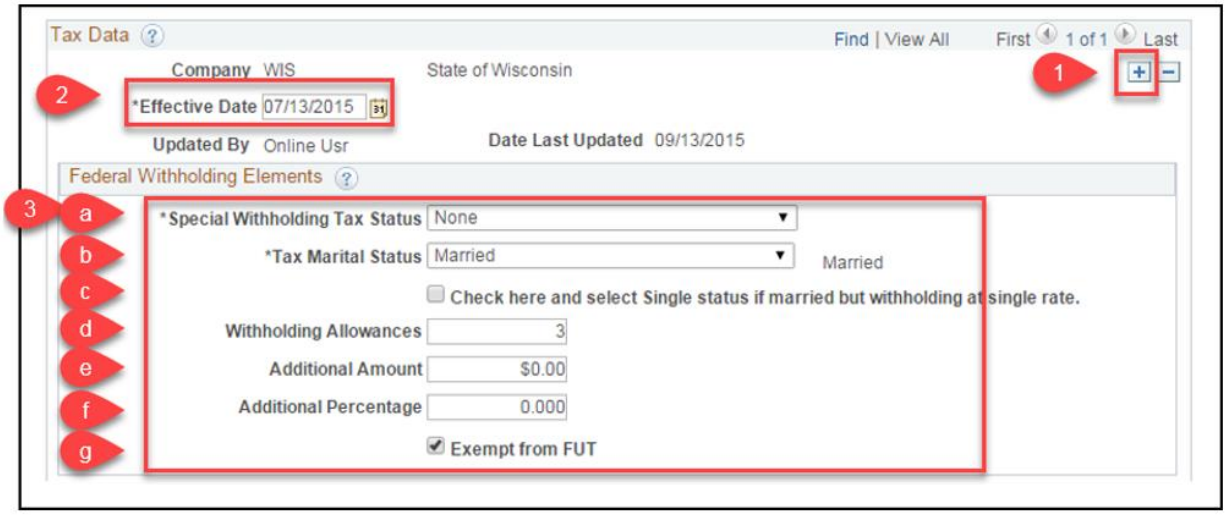
   Note: Regardless if federal tax data needs to be updated or not, a new effective dated row for any tax change must be added on the Federal Tax Data tab first

2. Enter an Effective Date which reflects the date that the data was entered

   Note: Retroactive dates do not recalculate tax data for the previous periods

3. Review the following fields and update as needed:

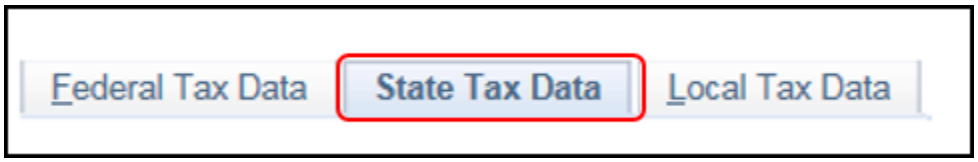
a. Special Withholding Tax Status: Select the appropriate value
b. Tax Marital Status: Select the appropriate value
c. Married withholding at the single rate checkbox: This selection is informational only
d. Withholding Allowances: Number of allowances claimed for withholding adjustments
e. Additional Amount: Additional flat dollar amount to be withheld from the employee for state taxes
f. Additional Percentage: Additional percentage of pay to be withheld from the employee for state taxes
g. Exempt from FUT: Select



4. Complete the Lock-In Letter Details only if notification has been received from a taxing authority requiring a limit on the employee's allowances. Note: When this selection is used, employees are blocked in ePay from entering allowances over the Limit on Allowances.
   a. Letter Received checkbox: Select
   b. Limit on Allowances: Enter the maximum number of allowances the employee is allowed to claim

STEP 3: Make required updates to the State Tax Data

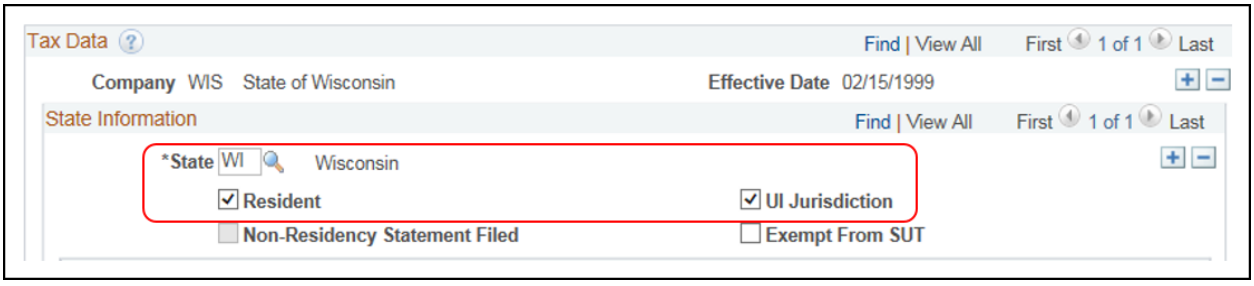
1. Select the State Tax Data tab



2. Verify the state record created is accurate for the employee
3. If the employee lives and works in separate states, add a state by selecting the Add a Row (+) in the State Information section. Then make updates for both states as specified in the following steps.
4. Enter or select the employee's work state or resident state, as applicable, in the State field
5. Use the Resident and UI Jurisdiction checkboxes to specify working state record versus living state record for the employee. For employees who live and work in the same state, both boxes should be checked on their single tax record.

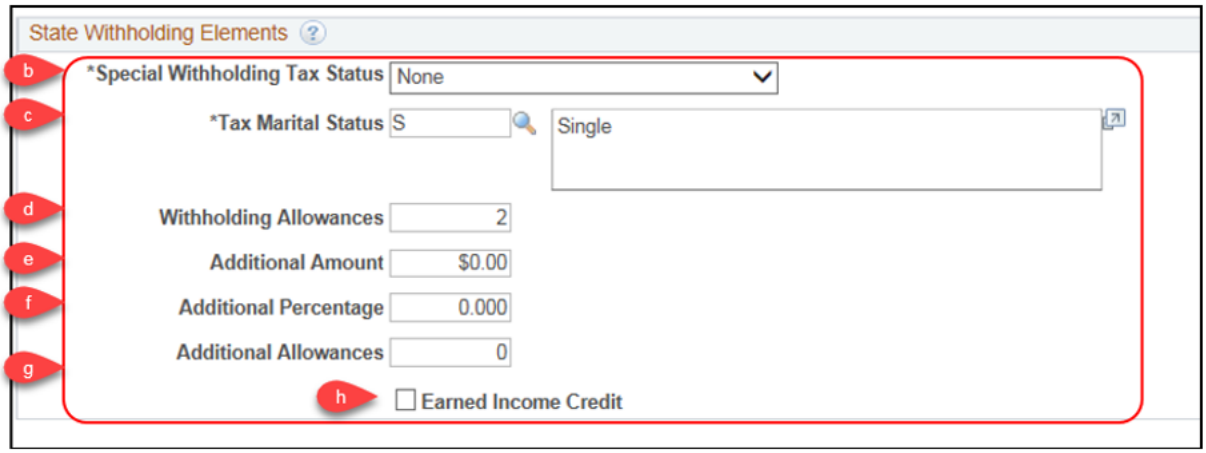
a. Resident checkbox: This should be selected for the state tax record that corresponds to the employee's state of residence

b. UI Jurisdiction checkbox: This should be selected for the state tax record that corresponds to the employee's work state location (typically WI)



6. Review the following fields and update as needed:
    a. Exempt From SUT: Select for employees claiming exempt from state unemployment taxes
    b. Special Withholding Tax Status: Select the appropriate value
    c. Tax Marital Status: Select the appropriate value
    d. Withholding Allowances: Number of allowances claimed for withholding adjustments
    e. Additional Amount: Additional flat dollar amount to be withheld from the employee for state taxes
    f. Additional Percentage: Additional percentage of pay to be withheld from the employee for state taxes

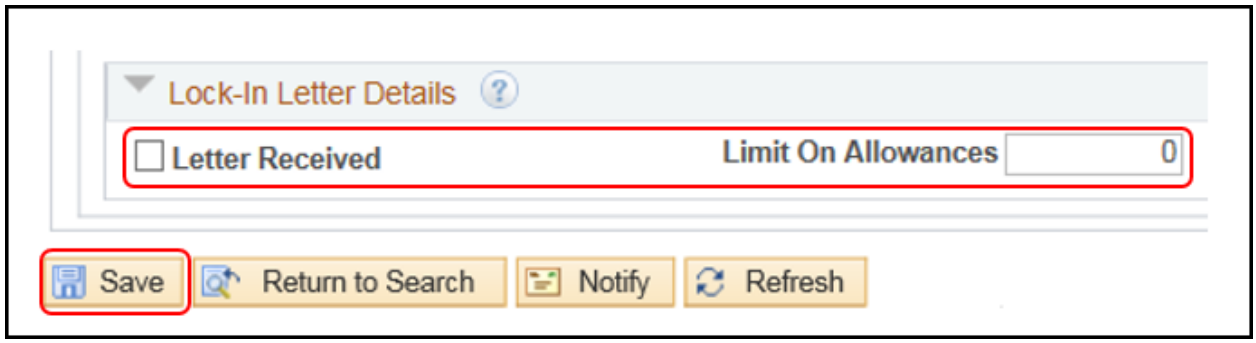
g. Additional Allowances: Any additional allowances claimed for withholding adjustments
h. Earned Income Credit: Select for employees qualifying low or moderate-income employees



7. Complete the Lock-In Letter Details only if notification has been received from a taxing authority requiring a limit on the employee's allowances. Note: When this selection is used, employees are blocked in ePay from entering allowances over the Limit on Allowances.

   - Letter Received checkbox: Select
   - Limit on Allowances: Enter the maximum number of allowances the employee is allowed to claim

8. Click Save



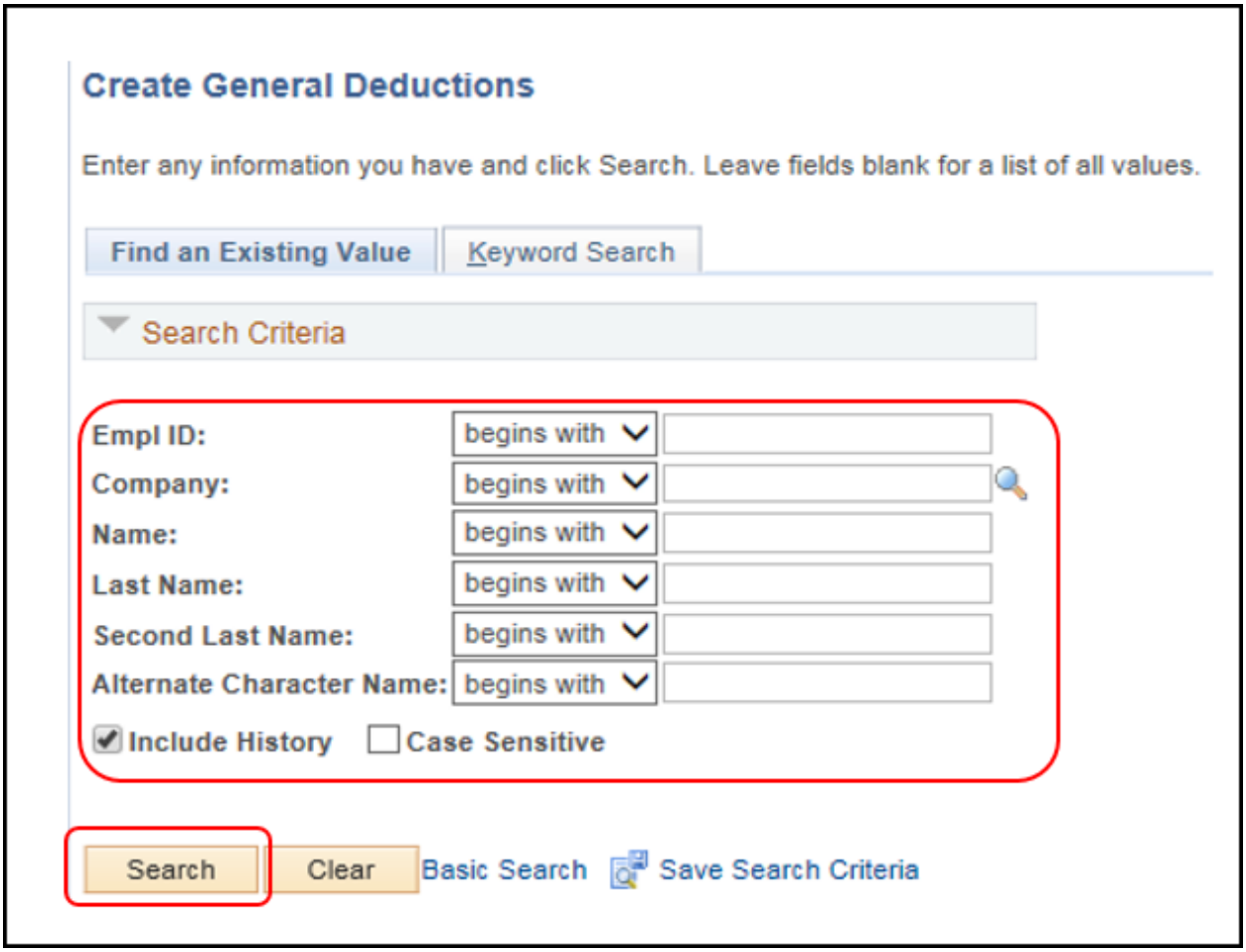
Payroll - Set Up General Deductions

Role: Agency Payroll Specialist

General deductions refer broadly to non-benefit deductions. While these are entered at many times throughout a person's employment, at time of hire, a few such as parking or van pool may be entered.

STEP 1: Navigate to the Create General Deductions page and locate the desired new hire/rehire employee

1. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions**
2. Enter the desired search criteria in the Find an Existing Value tab
3. Select Search



4. If multiple employees result, click the desired employee from the Search Results list

STEP 2: Enter the appropriate General Deductions

1. Enter or select deduction type/name in the Deduction Code field

2. In the Deduction Details section, enter the following information for the deduction code selected above:

a. Effective Date: The date the deduction is effective. As a best practice, use the 1st day of the 1st pay period in which the deduction should be effective. Note that PeopleSoft will take the entire deduction for the pay period the effective date falls within.

b. Calculation Routine: Flat Amount. This is the only value used at the State and thus should always be the selection.

c. Take on all Paygroups: Uncheck. *This is very important to uncheck so that the deduction is not taken on all pay checks an employee with multiple appointments receives.

d. Flat/Add'l Amount: Specify the dollar amount taken for the deduction

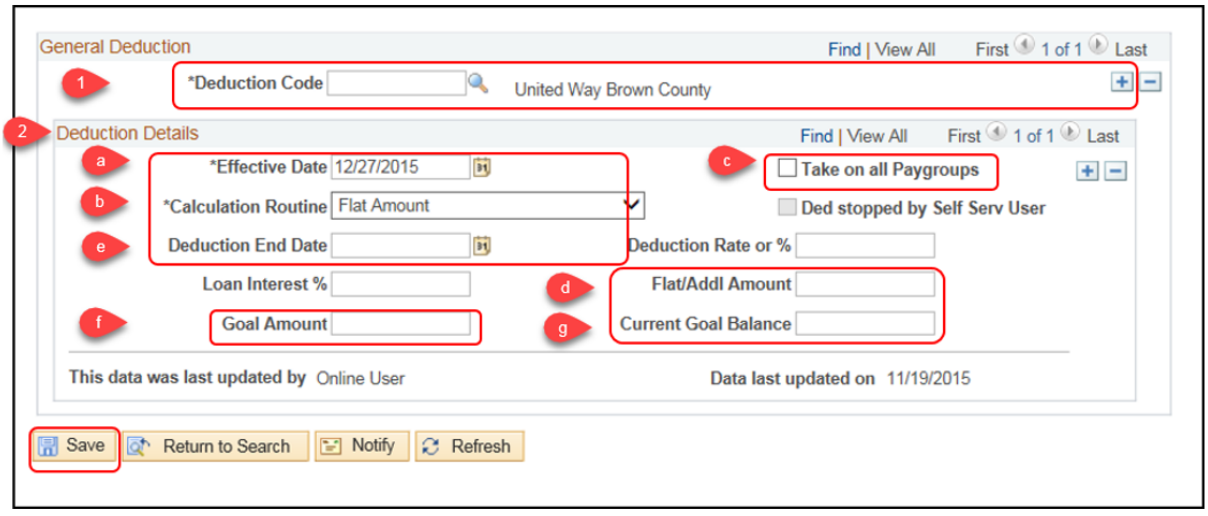
e. Deduction End Date: (if required) the date the deduction should discontinue

f. Goal Amount: (if required) establishes the deduction cap

Note: Deductions stop when the Goal Amount is reached or the Deduction End Date, whichever comes first

g. Current Goal Balance: (no entry) This field automatically updates as period deductions are taken when a Goal Amount has been set

2. If additional deductions are required:
   g. Select Add a Row (+) in the General Deduction section
   h. Enter or select the next deduction type/name in the Deduction Code field
   i. Continue updating the Deduction Details same as above
3. When all deductions are entered, click Save



Payroll - Enroll In Direct Deposit

Role: Agency Payroll Specialist

Enrolling in Direct Deposit is available for the employee to perform through ePay Self Service. While best practice is to encourage employees to use ePay, there will be

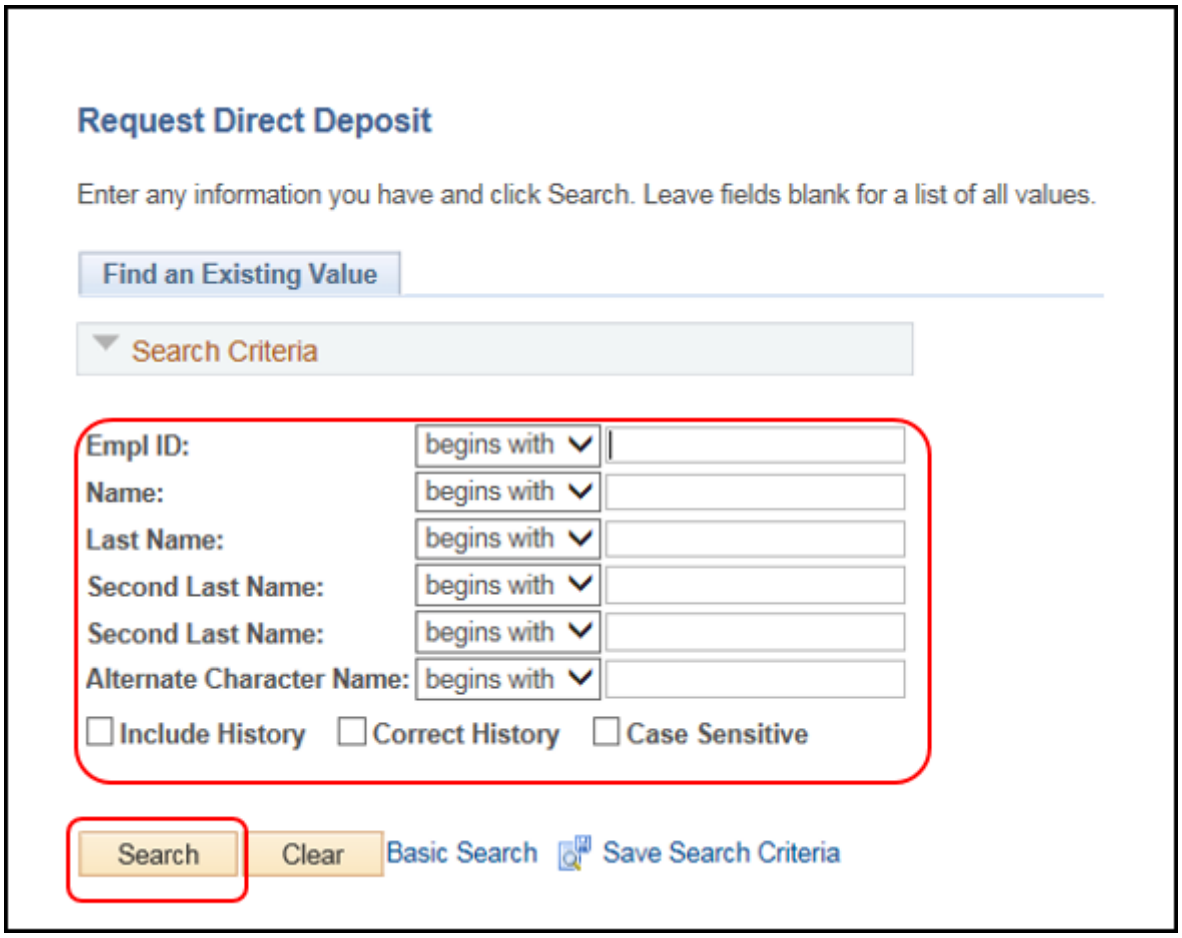
situations when the Agency Payroll Specialist will need to enter the information on behalf of the employee.

Direct Deposit is mandated by the State. All employees must have at least one Balance of Net Pay direct deposit set up. This is the last priority account where funds will be distributed after any additional, higher priority direct deposits have been taken. Employees are allowed to have an unlimited number of direct deposits.

STEP 1: Navigate to the Request Direct Deposit page and locate the desired new hire/rehire employee.

1. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**

2. Enter the desired search criteria in the Find an Existing Value tab
3. Select Search



4. If multiple employees result, click the desired employee from the Search Results list

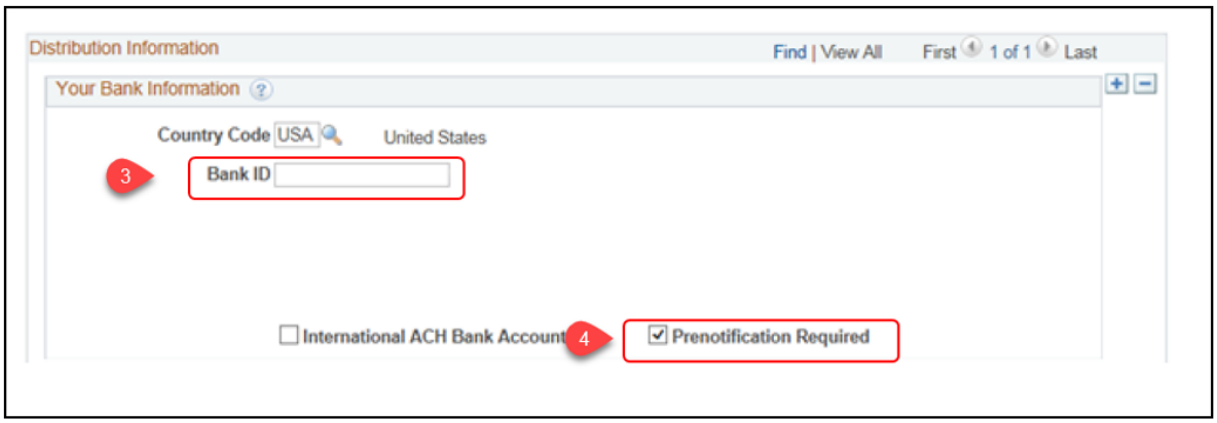
STEP 2: Enter the employee's Balance of Net Pay direct deposit. If the employee has only one account, this will be attached to that account. If the employee has multiple direct deposit accounts, this is the account where the remainder of the check will go after all other direct deposits are distributed.

1. Enter the Effective Date and select Active from the Status list
2. The Suppress DDP Advice Print option is selected by default indicating the employee will receive an electronic advice only. If the employee needs a paper advice printed, uncheck this option



3. Enter the Bank ID which is the routing number
4. Select Prenotification Required

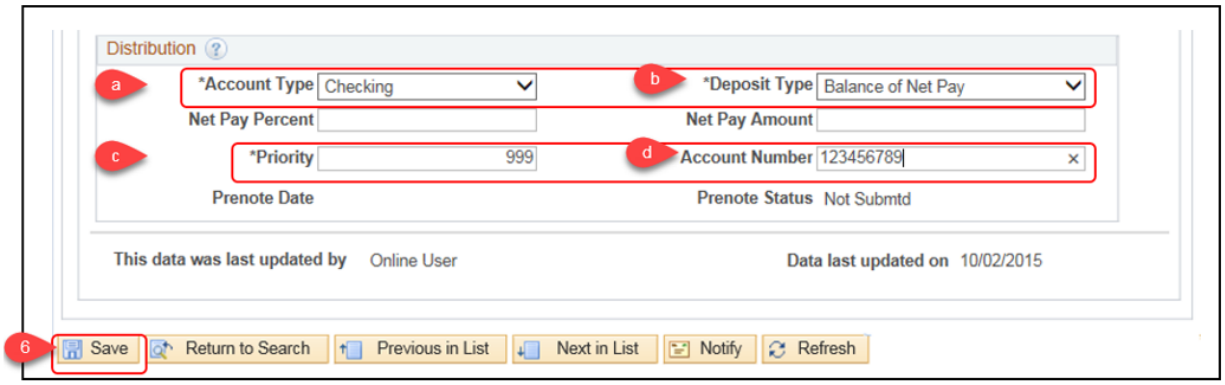
a. Prenotifications go out daily and have a 10-day waiting period. During that time, the employee may still receive a paper check.



5. Enter the following data:

a. Account Type: Select the appropriate value
b. Deposit Type: Balance of Net Pay
c. Priority: 999
d. Account Number: Enter the employee's bank account number

6. If no additional Direct Deposit accounts are required, click Save
7. If additional Direct Deposits need to be entered for the employee, do not save. Continue to Step 3



STEP 3: (Optional) Enter any additional direct deposits

1. Click Add a Row (+) in the Distribution Information section
2. Enter the following data:

a. Bank ID: Routing Number
b. Prenotification Required: Select
c. Account Type: Select the appropriate value
d. Deposit Type: Select Amount or Percent
e. Net Pay Percent: Enter percentage if Deposit Type was selected as Percent
- Note: Percentages are accepted but discouraged. They may not function as expected when multiple percent direct deposits are used. The first priority percent will be taken from the employee's net pay. The second percent will be taken from the remaining net pay amount after the first priority is deducted.

f. Net Pay Amount: Enter flat amount if Deposit Type was selected as Amount
g. Priority: Enter the priority order in which the direct deposit should be taken, with 1 being the first priority
h. Account Number: Enter the employee's bank account number

3. After all required Direct Deposits have been entered, click Save

Benefits - Enter ABBR For Life, ICI, And AD&D

Role: Agency Benefits Specialist

The Annual Benefits Base Rate (ABBR) is used to calculate premium and coverage level for ICI, State Group Life and AD&D. At hire, the Benefits Specialist will enter all three ABBRs for all WRS-covered employees as soon as the employee's job data entry is complete – preferably on the same day.

It is recommended that the Benefits Specialist enter the ABBR amounts into PeopleSoft. If the amount is not entered on the same day that the hire is entered, the system will automatically populate the employee's ABBR fields, using the calculation logic below. Given all of the nuances related to an employee's projected salary, the automated calculation may not always be accurate.

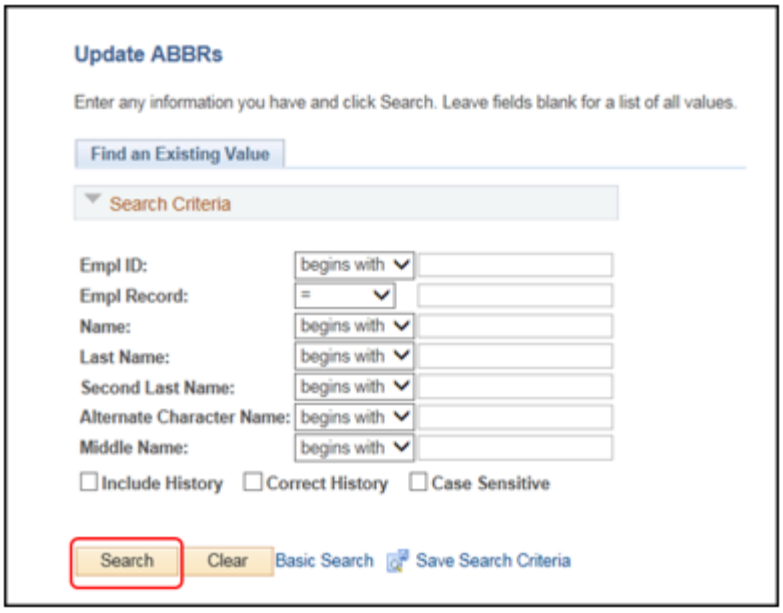
ABBR Calculation Used at Hire (see Life and ICI manuals for full details)

- State Group Life and ICI – Take the employee's annual projected salary and round to the next $1000
    - If paid hourly rate: (Hourly Rate) x (2080) x (FTE – if less than full-time)
        - Take result and round to next highest $1000
    - If paid monthly rate: (Monthly Rate) x (12) x (FTE – if less than full-time)
        - Take result and round to the next highest $1000
- **For ICI, do NOT enter an ABBR greater than $120,000**, even if the employee's salary exceeds this amount.
- AD&D – (Hourly Rate) x (174) x (12)
    - Do NOT round or adjust if less than full-time

Note: The ABBR for all plans will be updated centrally during the annual update period(s).

STEP 1: Navigate to the Update ABBRs page and locate the desired new hire/rehire employee

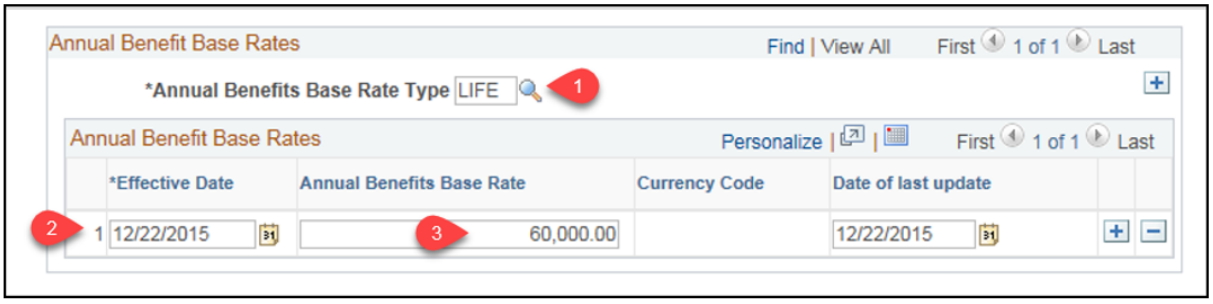
1. Navigation: **Main Menu > Benefits > Employee/Dependent Information > Update ABBRs**
2. Enter the desired search criteria in the Find an Existing Value tab
3. Select Search



4. If multiple employees result, click the desired employee from the Search Results list

STEP 2: Enter the calculated rates for the three ABBR types

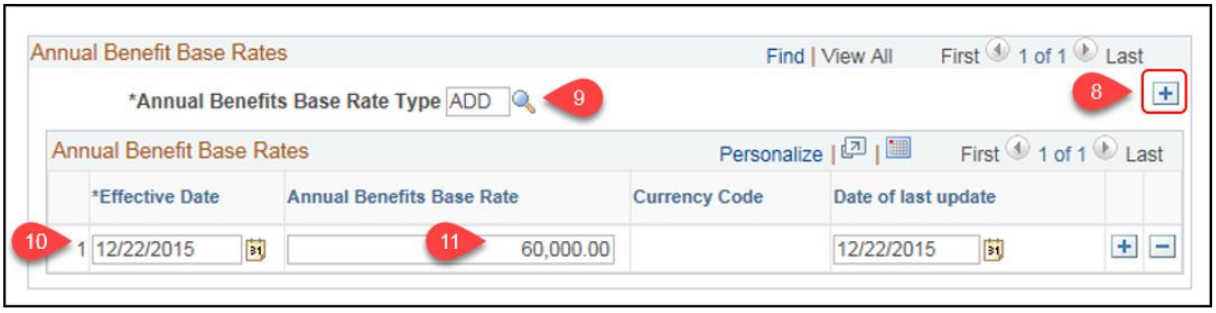
1. Enter or select LIFE in the Annual Benefits Base Rate Type field
2. Enter or select the Effective Date which is the hire date for a new hire/rehire
3. Enter the calculated Annual Benefits Base Rate for State Group Life



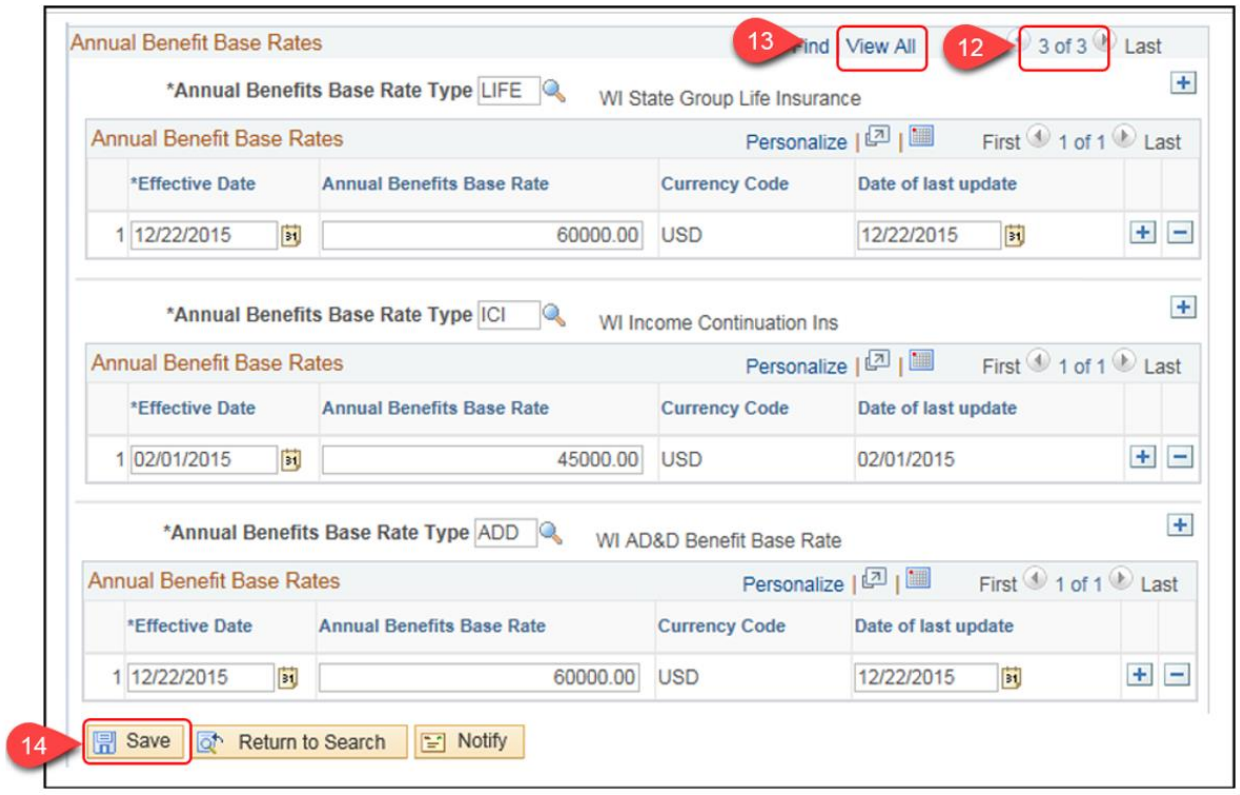
4. Click Add a Row (+) to the right of the Annual Benefits Base Rate Type field.
5. Enter or select ICI in the Annual Benefits Base Rate Type field.
6. Enter or select the Effective Date which is the hire date for a new hire/rehire.
7. Enter the calculated Annual Benefits Base Rate for Income Continuation Insurance. Never enter a value greater than $120,000.



8. Click Add a Row (+) to the right of the Annual Benefits Base Rate Type field.
9. Enter or select ADD in the Annual Benefits Base Rate Type field.
10. 1Enter or select the Effective Date which is the hire date for a new hire/rehire.
11. Enter the calculated Annual Benefits Base Rate for Accidental Death & Dismemberment.



12. Notice your page count should now say 3 of 3.
13. Click View All to see all three entries on one page and verify they were added correctly.
14. Click Save.



Benefits - Open Events Query

Role: Agency Benefits Specialist
Trigger: Open Event Query

Once a Hire action is entered on Job, a HIR event is added to the BAS Activity Table. The overnight Benefits Administration batch process opens the HIR event for entry.

It is recommended that the agency benefits specialist runs the Open Event query once per day to review all open events to see if any actions need to be taken or if any employees need to be contacted.

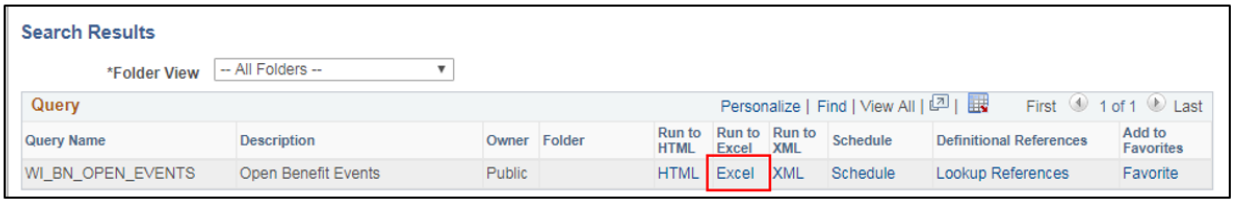
Run the Open Events Query

STEP 1: Navigate to the Query View page and run the query.

1. Navigation: **Main Menu > Reporting Tools > Query > Query Viewer**
2. Enter the following:
    a. Search By: Query Name
    b. Begins With: WI_BN_OPEN_EVENTS
    c. Click Search.



3. Under the Search Results, click the file format in which to receive the results of the query. This is typically Excel. Note: Ensure the pop-up blocker is disabled.



4. On the resulting page, enter the following:
    a. Agency Number: Enter the five-digit agency number.
    b. Dept ID: Enter a department ID. If left blank, all departments within the agency entered will be on the query.
    c. Sched ID: A schedule ID is required. For everyday maintenance, enter EM2017 (this value changes on an annual basis). During open enrollment, the schedule ID will be a different value.

5. Click View Results.



6. Open the Excel spreadsheet that is created.

STEP 2: Review the query results and open benefits actions.
This report provides the Agency Benefits Specialist with all of the employee's identifying information, as well as the benefit action, benefit event date and how long the event will be open.

Look for any Benefits Actions related to new hires or rehires. Depending on the situation, this could be HFA or HIR. For HFA, benefits will have to be manually

entered against the HFA event. For HIR, notify the employee to complete their benefits in eBenefits.

Most new hire (HIR) events will have one of two event statuses:

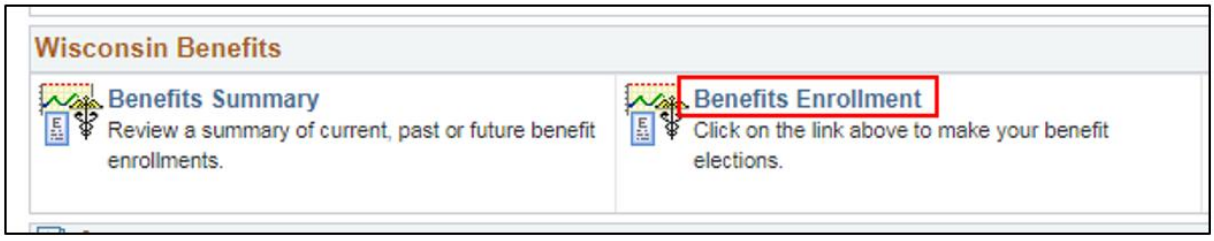
- Open for Processing – event is open for entry and the employee hasn't made any eBenefit elections
- Notified – event is open and the employee has logged in to their eBenefits HIR event but hasn't submitted their elections yet. Watch out for this group and be sure to send reminders to employees who are in Notified status and are close to the end of the 30-day enrollment period.

Sample of Query Output

Benefit Program	Benefit Action	Benefit Event Date	Benefit Event Due Date	Event Status	Process Status	Event ID
FTB	HIR	8/7/2017	2017-09-06	Open for Processing	Prepared	1
FTB	HIR	8/7/2017	2017-09-06	Open for Processing	Prepared	1
FTB	HIR	7/24/2017	2017-08-23	Open for Processing	Prepared	2
FTB	HIR	8/7/2017	2017-09-06	Open for Processing	Prepared	1
FTB	HFA	8/6/2017	2017-09-05	Open for Processing	Prepared	1
DEF	HIR	8/7/2017	2017-09-06	Open for Processing	Prepared	1
DEF	HIR	8/7/2017	2017-09-06	Open for Processing	Prepared	1
FTB	HIR	8/7/2017	2017-09-06	Open for Processing	Prepared	1
P50	SHR	8/11/2017	2017-09-10	Open for Processing	Prepared	5
FTB	HFA	7/24/2017	2017-08-23	Open for Processing	Prepared	4

Benefits - EBenefits For New Hire (Not Hire From Affiliate)

Role: Agency Benefits Specialist
Once the employee's HIR event is open, you should direct the employee to Employee Self-Service to enroll in benefits. The employee can access eBenefits by clicking on the Benefits Enrollment link in the Wisconsin Benefits Section of the ESS landing page.



Agencies should provide the eBenefits Quick Guide Job Aid to employees at hire.

Benefits - Paper Application Entry

Role: Agency Benefits Specialist
Agencies should always encourage employees to use eBenefits to make their new hire elections. However, agencies can enter paper applications on the HIR event if eBenefits is not used. Paper application entry is also required when an employee is hired from another payroll center (ex. UW, UWHC, WHEDA…) and a Hire from Affiliate action reason is used on the job. This will create a Hire from Affiliate (HFA) benefit event.

When someone is hired from an affiliate, a benefits transfer record will be received. The Agency Benefits Specialist will review the benefits from the transfer record and then manually enter any paper applications received by the employee. These employees can enroll only in the benefits that they previously carried, as well as any new benefits offered by the state. An eBenefits event does NOT open for a Hire from Affiliate and thus elections cannot be done by the employee.
Refer to the Entering a Benefits Election on Behalf of an Employee Job Aid for details on how to enter paper applications.

Benefits - HIR Event - What Does It Do?

Role: Agency Benefits Specialist

A HIR event will:

- Open in eBenefits to employees
- Auto-close 30 days after the hire date if no elections are made

Below is the logic (event rules) behind the HIR event:

Benefit Plan	Effective Date	Required to Make Election	Comments
Health	1st of month on or following event date	Yes	Health option that appears if employee has least 2 months of WRS state service (6 months if LTE) based on benefits service date.
Health (early coverage – no ER contribution)	1st of month on or following event date	No	Health option that appears if employee does not have at least 2 months of WRS state service (6 months if LTE) based on benefits service date. If elected, employee pays full cost of health insurance until eligible for employer contribution.
Health (wait until eligible for ER contribution)	1st of the month on or following the completion of 2 months of state	Yes	Health option that appears if employee does not have at least 2 months of WRS state service (6 months of LTE) based on

	service		benefits service date.
Life -Basic & Supplemental -Additional -Spouse &Dependent	1st of the month following the 30-day enrollment period that begins on the hire/rehire date	Yes	The employee must enroll in Basic Life before enrolling in any other coverage level
ICI -Standard -Supplemental	1st of month on or following event date	Yes	Supplemental enrollment will only be available if the employee's annual salary is > $64,000 and the supplemental ICI code is used in Elg Fld 2.
Anthem Dental Dental Wisconsin EPIC Benefits+ VSP Vision	1st of month on or following event date	No	
AD&D	1st of the month on or following the 30-day enrollment period that begins on the hire/rehire date	No	
Health Savings Account (HSA)	1st of month on or following event date	No	Must be enrolled in HDHP. Will be required to make an election if HDHP is elected. Central Benefits will manually change the effective date of the health insurance coverage effective date if it's not the 1st of the month on or following the HIR date.
Healthcare FSA/LPFSA	1st of month on or following event date	No	Both options will open to employees. If enrolled in HDHP, employee should enroll in LPFSA. Central Benefits audits enrollments to ensure employees are in the correct plan.
Dependent Care FSA	1st of month on or following event date	No	
Pre-Tax Parking Pre-Tax Transit	1st of month on or following event date	No	

Benefits - HFA Event - What Does It Do?

Role: Agency Benefits Specialist

A HFA event will:

- Open to agency for entry (Perform Election Entry). Will NOT open in eBenefits to employees
- Auto-close 30 days after the hire date if no elections are made

- All benefits are effective the 1st of the month on or following the hire from affiliate date except:
    - AD&D – effective 1st of the month on or following the 30-day enrollment period that begins on the hire date

HR - Add An Employment Instance

Role: Agency HR Specialist

When to add an employment instance:

- When an employee is in two consecutive positions at the same time (two part time permanent positions, a permanent position and an LTE/Project/POI/Contingent Worker position, multiple LTE positions)
- When you're putting an employee on an LOA to serve in an unclassified position
- Hiring into a permanent position when the person is already in PeopleSoft as a POI or Contingent Worker (or the other way around)
- If you don't flow directly to job data when entering a new person into the system

 **IMPORTANT:** When adding the new employment instance, regardless if the position is with a different agency, do NOT "steal" the employee using the Request Job Change functionality. This is not necessary; simply add the new employment instance.

Create a new employment instance for the new position. This instance is assigned a new Empl Record number which is used to track transactions and records associated to the position.

STEP 1: Navigate to the Employment Instance page and find the employee.

1. Navigation: **Main Menu > Workforce Administration >Job Information > Job Data > Add Employment Instance** (or Add Contingent Worker Instance if adding a contingent worker employment instance or Other Payee if adding a POI instance)
2. Enter or select the desired Empl ID.
3. Enter the new Empl Record #
4. Click Add Relationship.

STEP 2: Add a row with a Hire Action and appropriate Action Reason to the employee's Job Data record.

1. Notice the Empl Record for this employment instance has been incremented
2. Enter or select the desired Effective Date for the start of the position.
3. Select the appropriate Reason from the list.
4. Select the most appropriate Job Indicator.



STEP 3: Complete all required Job Data pages fields. Continue entering complete job data for the position as a hire.

CHECKLIST: ENTERING A NEW HIRE/REHIRE

Name: _____ Empl ID: _____

☐ ENSURE POSITION DATA IS UPDATED

Role: Position Management Specialist

☐ SEARCH FOR AN EXISTING PERSON

Role: HR Personnel Roster

Search for People, Personnel Roster, Enterprise Personnel Report

Check to see if the person is already in PeopleSoft. If no, continue with the next step. If yes, skip to Enter Job Data.

☐ ENTER PERSONAL/BIOGRAPHICAL DATA (NEW HIRE ONLY)

Role: Agency HR Specialist

Navigation: **Main Menu** > **Workforce Administration** >**Personal Information** > **Add a Person**

☐ ENTER JOB DATA

Role: Agency HR Specialist

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data**

Confirm employment service dates and benefits eligibility prior to entry.

☐ ADD A PERSON PROFILE

Role: Agency HR Specialist

Navigation: **Main Menu** > **Workforce Development** >**Profile Management** > **Profiles** > **Person Profiles**

Enter Probation, Veteran Disability, and Severe Disability (3 mandatory). All other sections are optional.

ENTER TIME AND LABOR DATA

Role: Time and Labor Specialist or Agency HR Specialist

Agency HR Specialist – Enter this during Job Data entry via Time Reporter Data link on the Employment Data page.
Time and Labor Specialist – Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Create Time Reporter Data**

ASSIGN A SCHEDULE

Role: Time and Labor Specialist

Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Assign Work Schedule**
Schedules can be assigned only after overnight processes run. Enter this the day following new hire entry.
The assigned work schedule is only used for managing absences. This is not their actual daily work schedule.

VERIFY/UPDATE TAX DATA

Role: Agency Payroll Specialist

Verify/Update Federal and State Tax Data – Navigation: **Main Menu** > **Payroll for North America** > **Employee Pay Data USA** > **Tax Information** > **Update Employee Tax Data**

Verify/Update Tax Distribution – Navigation: **Main Menu** > **Payroll for North America** > **Employee Pay Data USA** > **Tax Information** > **Update Tax Distribution**

SET UP GENERAL DEDUCTIONS

Role: Agency Payroll Specialist

Navigation: **Main Menu** > **Payroll for North America** >**Employee Pay Data USA** > **Deductions** > **Create General**

ENROLL IN DIRECT DEPOSIT

Role: Agency Payroll Specialist

Navigation: **Main Menu** > **Payroll for North America** > **Employee Pay Data USA** > **Request Direct Deposit**
Set up the Balance of Net Pay direct deposit account.

ENTER ABBR FOR LIFE, ICI AND AD&D

Role: Agency Benefits Specialist

Navigation: **Main Menu** > **Benefits** > **Employee/Dependent Information** > **Update ABBRs**

ENROLL IN BENEFITS

Role: Agency Benefits Specialist

Encourage employees to enroll via eBenefits (provide Job Aid to employees); enter paper applications as needed.

Resources

- State of Wisconsin Compensation Plan
- Calculating Company Seniority Date: s. ER 18.02(2), Wis. Adm. Code; Calculation Worksheet
- Probation: s. 230.28, Wis. Stats. & Ch. ER-MRS 13, Wis. Adm. Code

- Reinstatement and Restoration – s. 230.31, Wis. Stats.; s. 230.32, Wis. Stats.; s. 230.33, Wis. Stats.; & Ch. ER-MRS 16, Wis. Adm. Code; s. 230.33, Wis. Stats. Restoration Bulletin
- Limitations on concurrent appointments: s. 16.417, Wis. Stats.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.1.2 Adding A Contingent Worker

Purpose
Adding A Contingent Worker
Entering Time And Labor Data
Time and Labor Setup - TAPFIN Conractors

Purpose

This document explains the key topics involved in adding a contingent worker to PeopleSoft. It provides context and step-by-step procedural guidance to perform the activities.

Adding A Contingent Worker

IT contractors must be entered into PeopleSoft and set up as time reporters to allow their time to be interfaced to Tapfin/Fieldglass. Entry into PeopleSoft for all other types of contractors is optional.

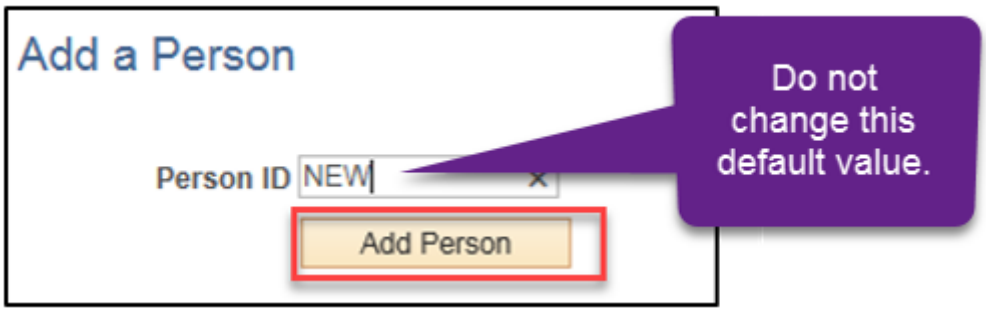
This is the minimum amount of data required for entry. Items with an asterisk (*) are required for entry. Entering additional information is highly recommended but at the discretion of your agency.

1. After ensuring the person is not already in the system by using the Person Search functionality, navigate to the Add a Person page.

Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Add a Person**

2. Click **Add Person**.

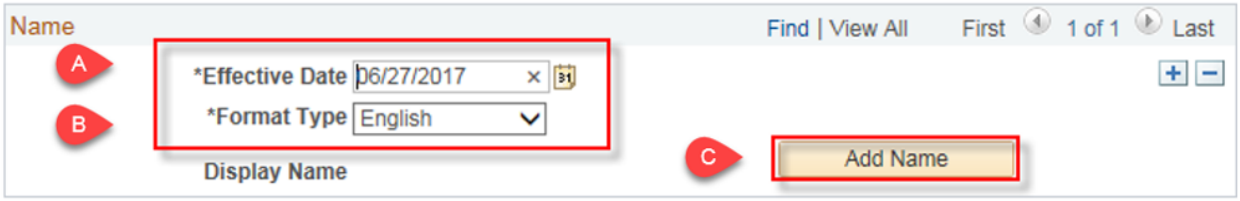
Do not change or add to the value of NEW in the Person ID field.



3. Input the following information in the Name section of the Biographical Details tab:

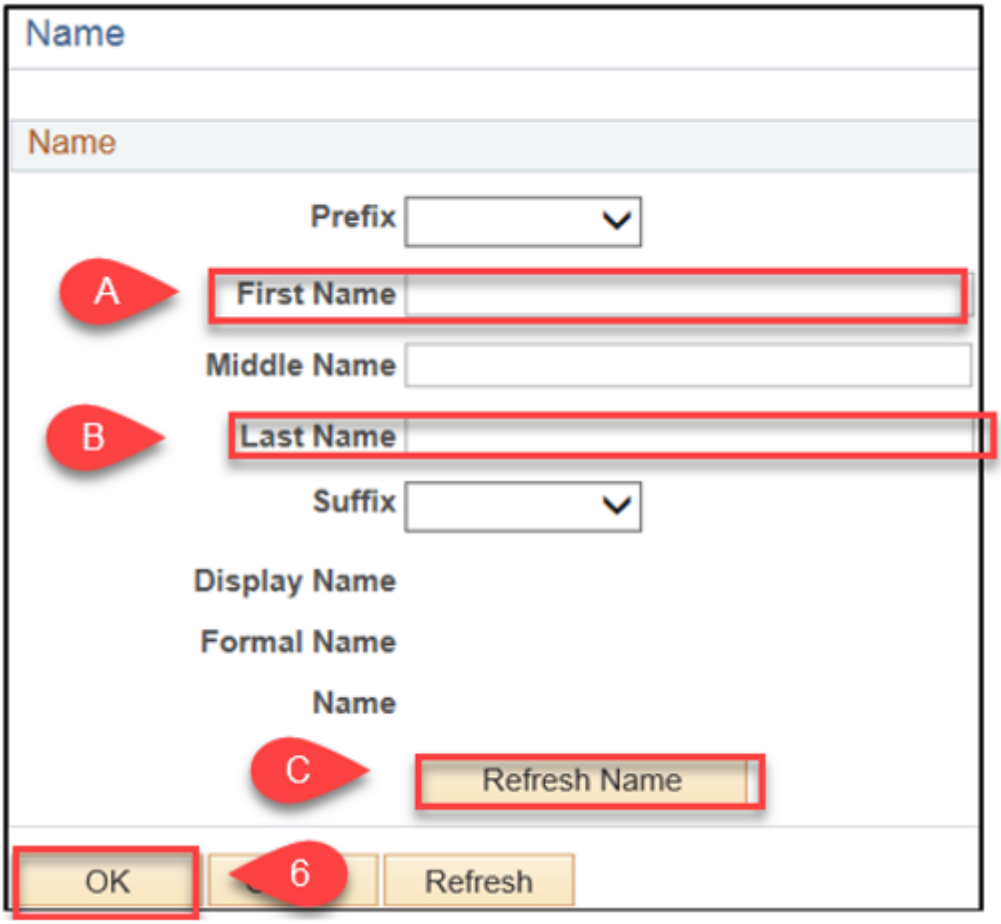


A. *Effective Date: The date the hire is effective.
B. *Format Type: English
C. Click Add Name to enter the contractor's nam



4. *Enter the contractor's name:
    A. **First Name:** The contractor's legal first name
    B. **Last Name:** The contractor's legal last name

5. Click **Refresh Name**



Note: The information in the **Display Name, Formal Name,** and **Name** will populate.

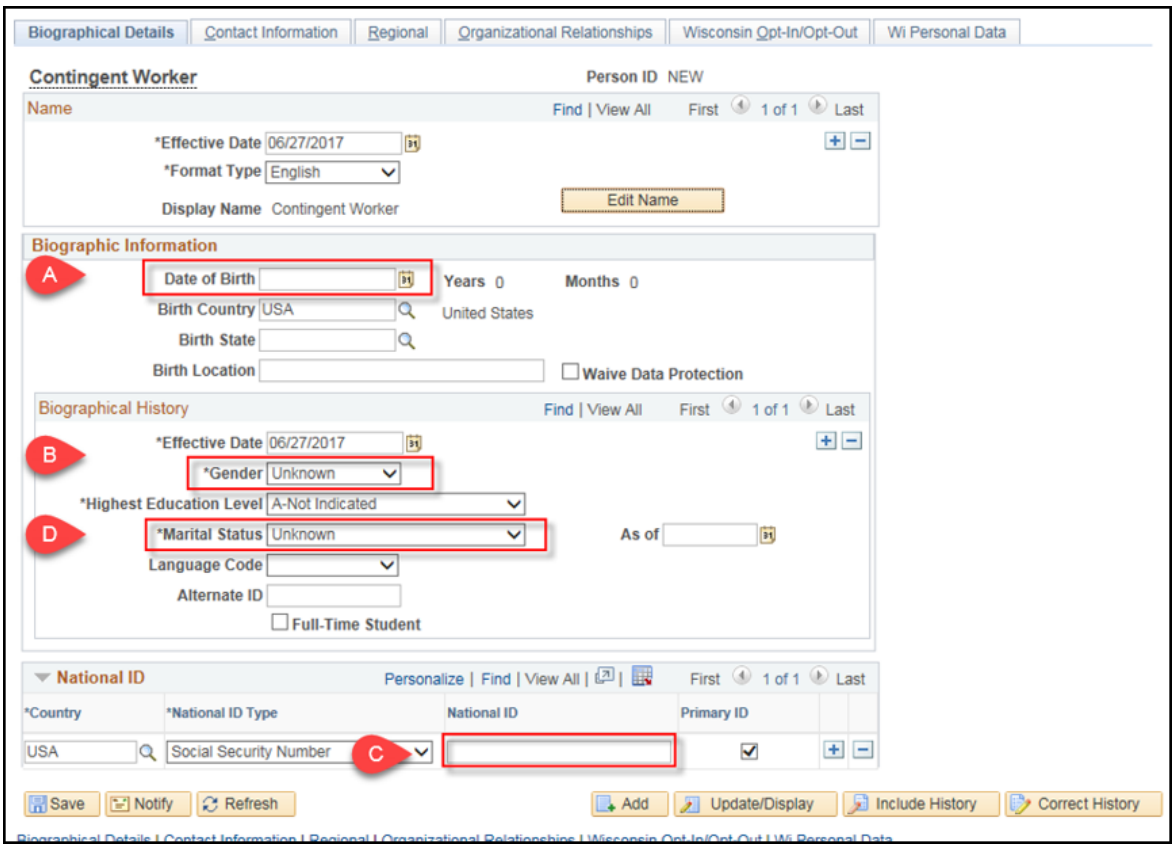
6. Click **OK.**

7. If at all possible enter the contractor's:
    A. **DOB**,
    B. ***Gender** and/or

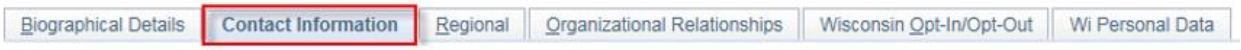
C. **SSN**

to avoid duplication now and in the future. *Gender is a required field and Not Specified is an option.

D. ***Marital Status** should remain Unknown with no "As of" date



8. Click on the **Contact Information** tab.

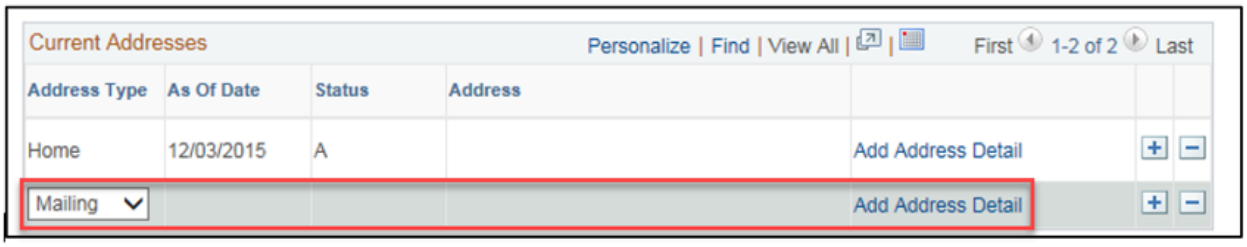


9. Most agencies will input the mailing address of the company the contractor is contracted through, rather than a home address.

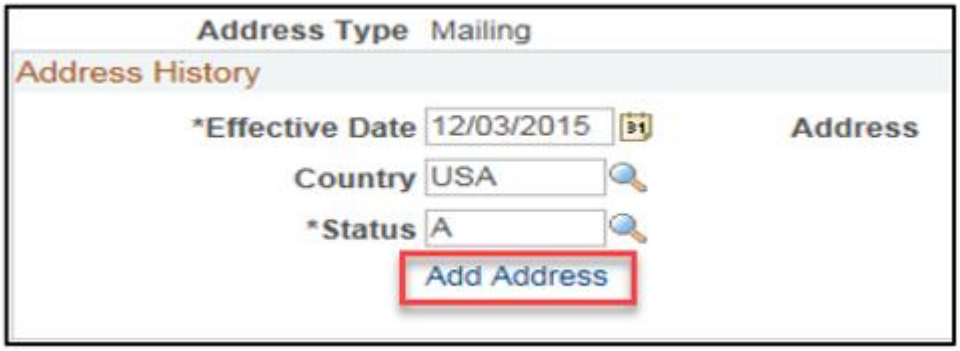
   Click **Add a Row (+)** on the first line of the Current Addresses section to add a new address type.



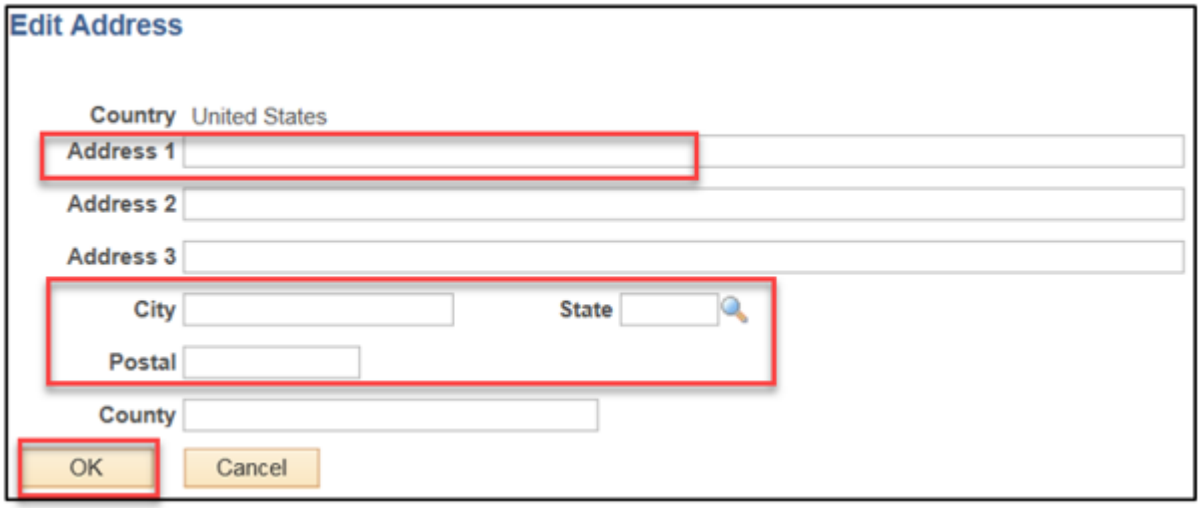
10. On the new row, select **Mailing** from the **Address Type** list.
11. Click **Add Address Detail**.



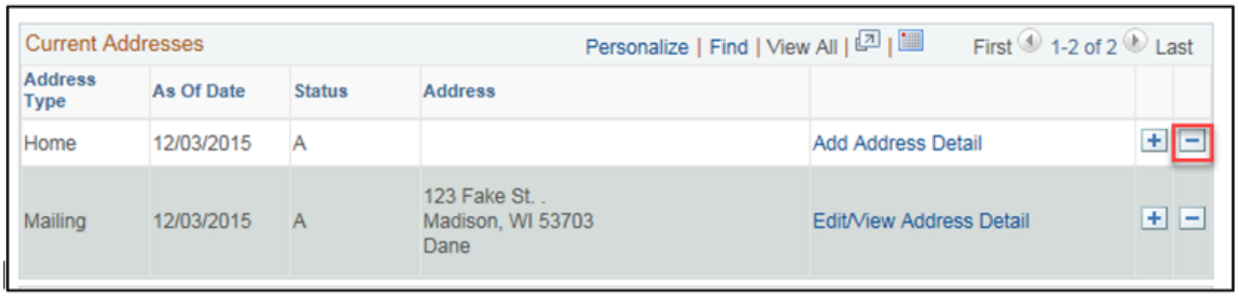
12. Click **Add Address**.



13. Enter **Address 1**, **City**, **State**, and **Postal** (Zip Code).



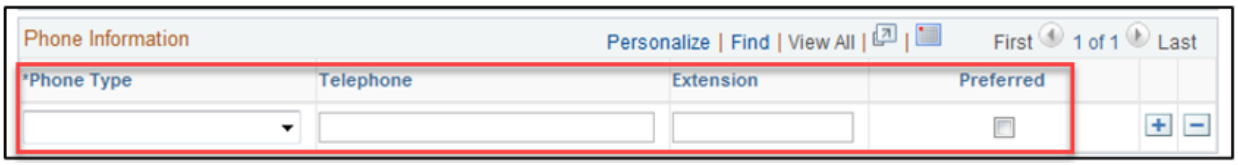
14. Click **OK** and **OK** again.
15. Click **Remove Row (-)** to remove the Home Address type.



16. Select a value from the **Phone Type** list.

- **Employee's FAX:** Work fax number
- **Employee's Home:** Home phone number
- **Employee's Other:** Any other phone number
- **Employee's Personal Mobile Ph:** Personal cell phone number
- **Employee's Work Mobile:** Work cell phone number
- **Employee's Work Phone:** Work landline number

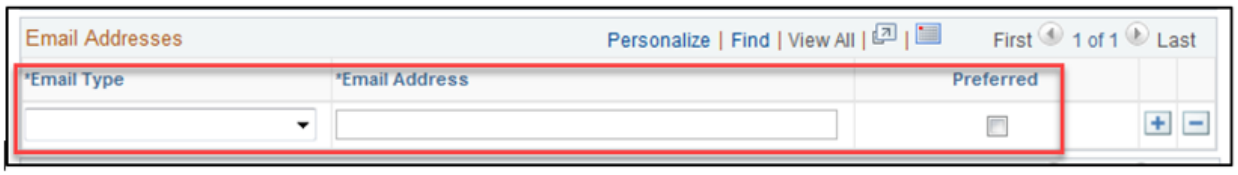
Enter the **Telephone** number, **Extension** (if applicable), and select the **Preferred** checkbox where appropriate.



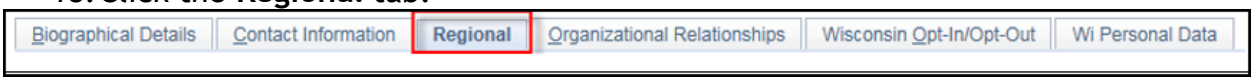
17. Select a value from the **Email Type** list.

- **Business:** Work email. Can only be entered/modified by Agency HR Specialist
- **Home:** Personal email address
- **Other:** Any additional email address

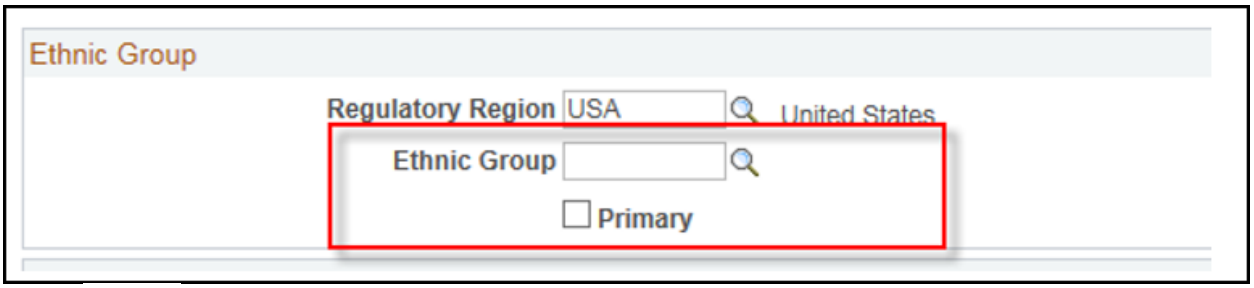
Enter the **Email Address** and select the **Preferred** checkbox where appropriate.



18. Click the **Regional** tab.

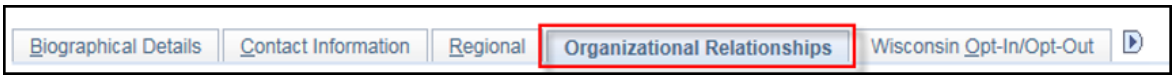


19. At least one ***Ethnic Group** must be selected and one must be indicated as ***Primary**

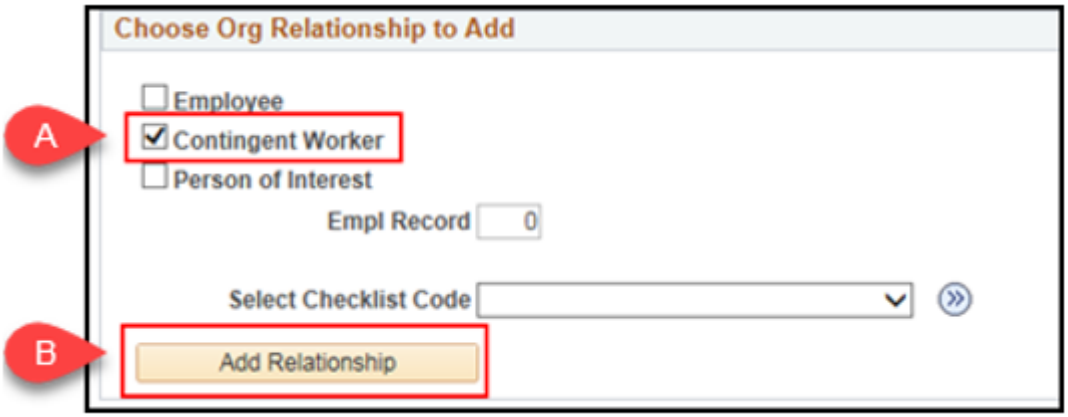


If the person's ethnic group is unknown select the option of **Not Specified**. The **Primary** indicator must be checked.

20. Click the **Organizational Relationships** tab.



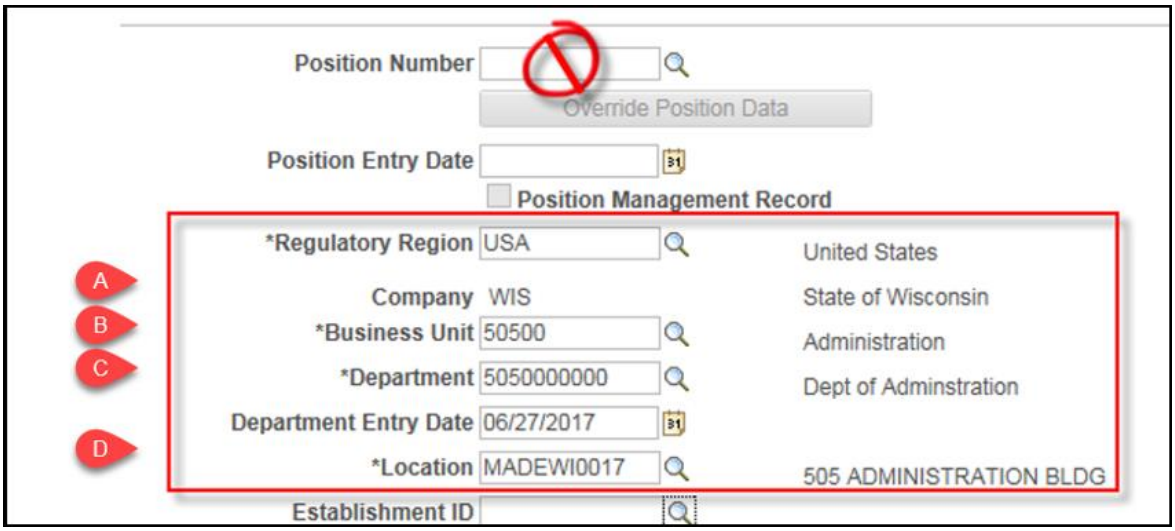
21. Do the following?
    A. Select the Contingent Worker checkbox.
    B. Click the Add Relationship button.



22. Verify the **Effective Date.** PeopleSoft should pass through the effective date of the hire you entered in the Add a Person page.
23. *Add Contingent Worker* should populate in the **Action** list. Select *Contingent Worker* from the **Reason** list.

24. Contingent workers do not have a position number. Enter or select:
    A. ***Company**
    B. ***Business Unit**

C. ***Department**
D. ***Location**



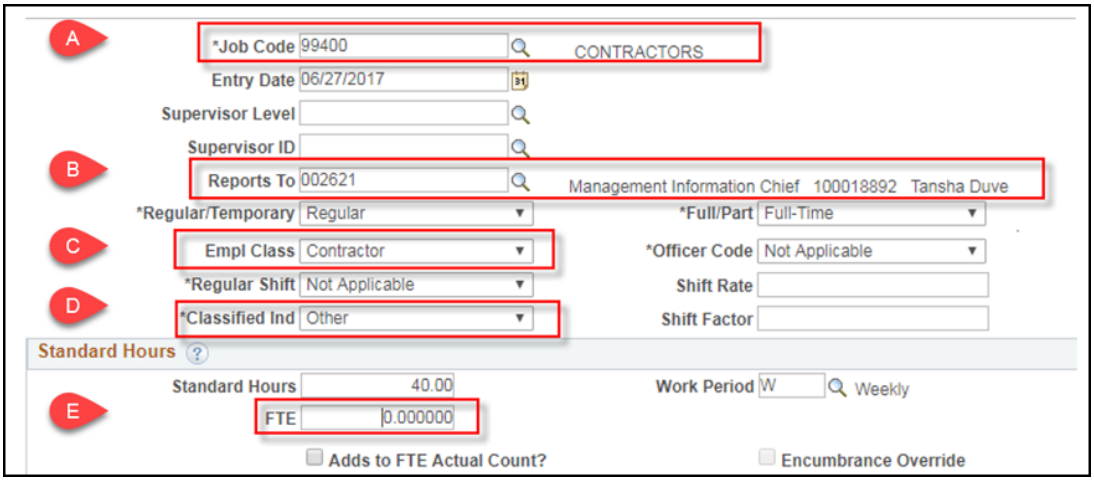
Department Entry Date defaults to the **Effective Date.**

25. Click the **Job Information** tab.

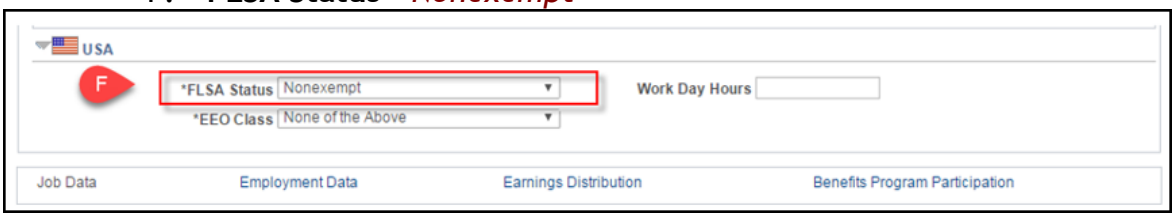


25. Enter the following data into the listed fields:

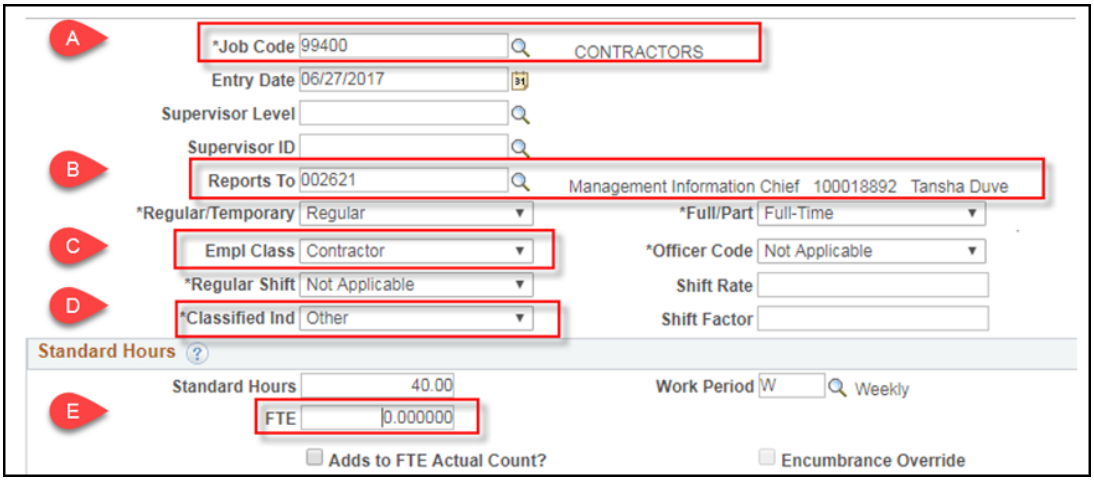
A. *Job Code: 99400 – Contractors
B. ***Reports To:** The position number of the contingent's supervisor
C. ***Empl Class:** Contractor
D. ***Classified Ind**: Other
E. ***FTE:** 0



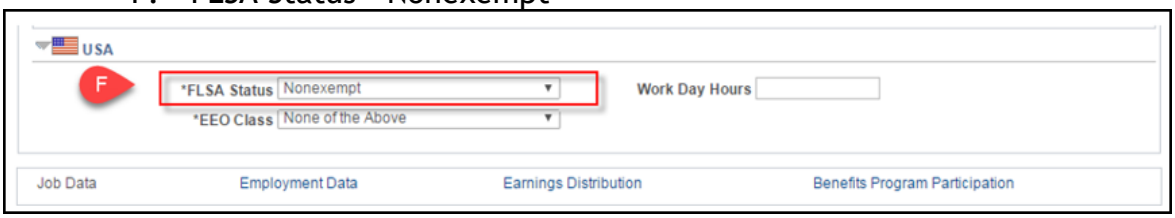
F. ***FLSA Status** - *Nonexempt*



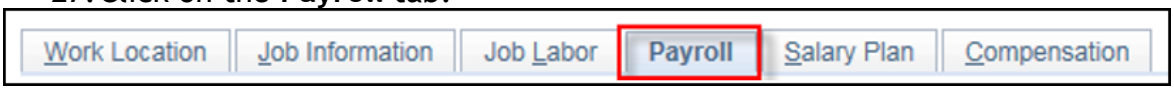
26. Enter the following data into the listed fields:
    A. ***Job Code:** 99400 – Contractors
    B. ***Reports To**: The position number of the contingent's supervisor
    C. ***Empl Class:** Contractor
    D. *Classified Ind: Other
    E. ***FTE**: 0



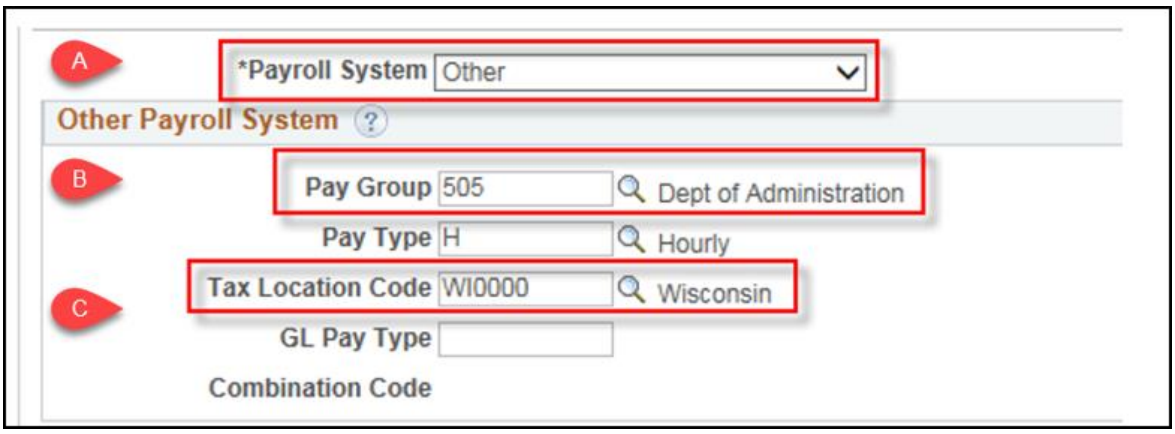
F. *FLSA Status - Nonexempt



27. Click on the **Payroll** tab.



28. Do the following:
    A. Select Other from the Payroll System list.
    B. Enter your Agency 3-digit number in the Pay Group field.
    C. Review and update the Tax Location Code as needed.

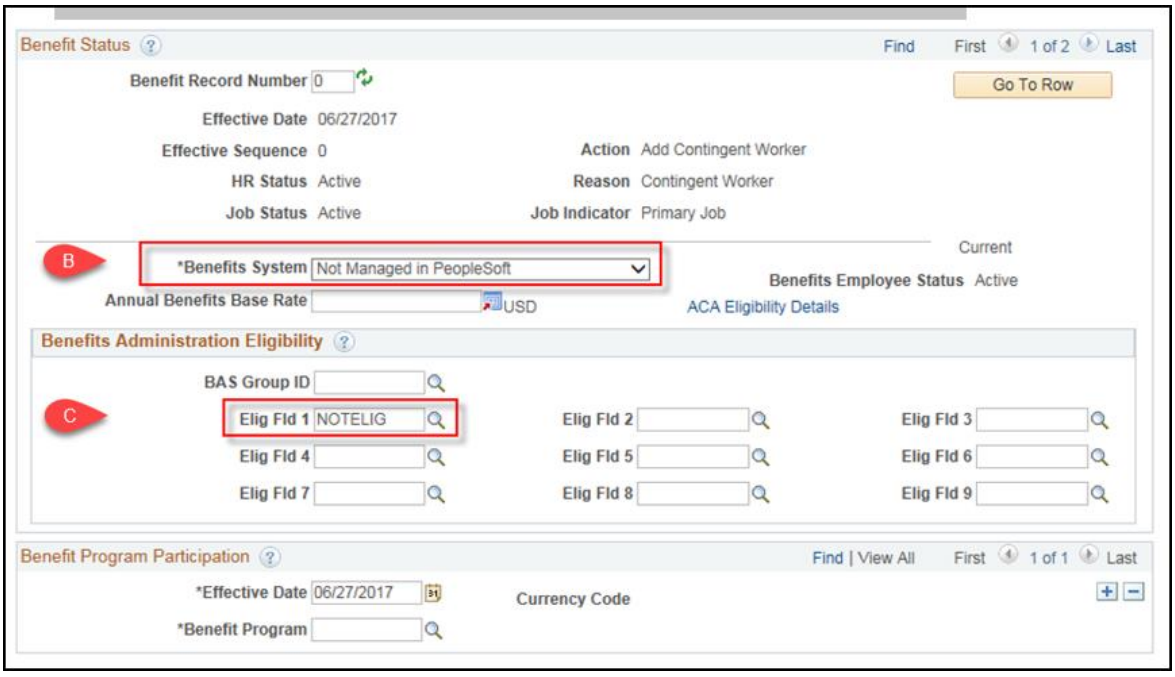


29. Click the Compensation tab.



30. Do the following:
    A. Enter NAHRLY into the first **Rate Code** and, if needed,
    B. Enter the **Comp Rate**. This is the base rate.
    Note: Compensation is only required for TAPFIN/Fieldglass contractors.

31. Click Calculate Compensation.
32. Click OK.
33. Do the following:
    A. Go to the **Benefit Program** Participation
    B. Select the ***Benefits System**: Not Managed in PeopleSoft
    C. Enter NOTELIG (Not Eligible Default) into the ***Elig Fld 1** field

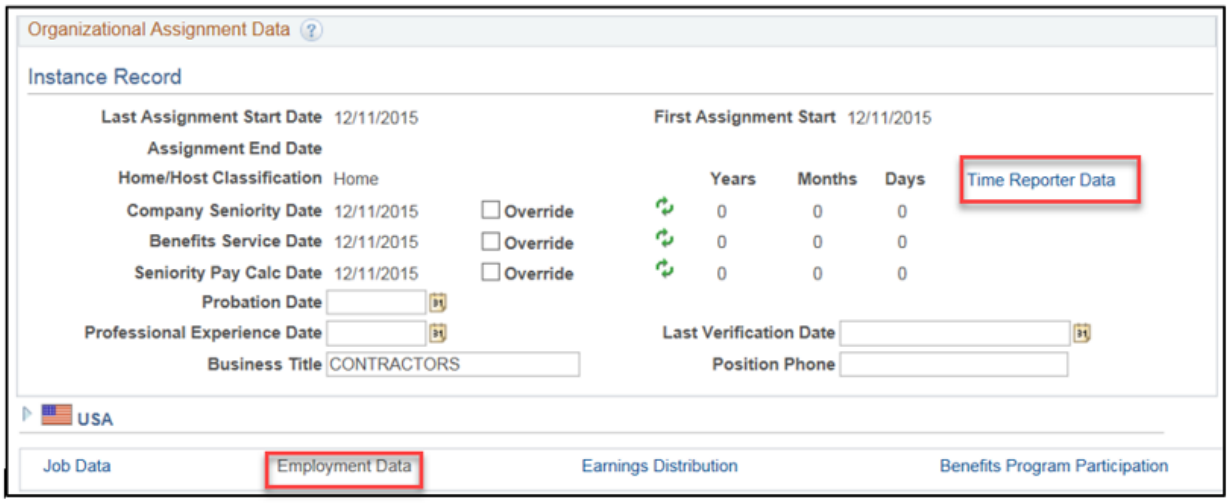


34. Click **Save**.

Entering Time And Labor Data

If The Contractor Will Be Entering Time, Time And Labor Data Is Required. Continue With The Steps Below.

1. Begin by navigating to the Time and Labor Data page.
    A. From within the contractor's Job Data page (with the Agency HR Specialist Role): Click the Employment Data link at the bottom of the page.
    B. Click the Time Reporter Data link on the right side of the page.

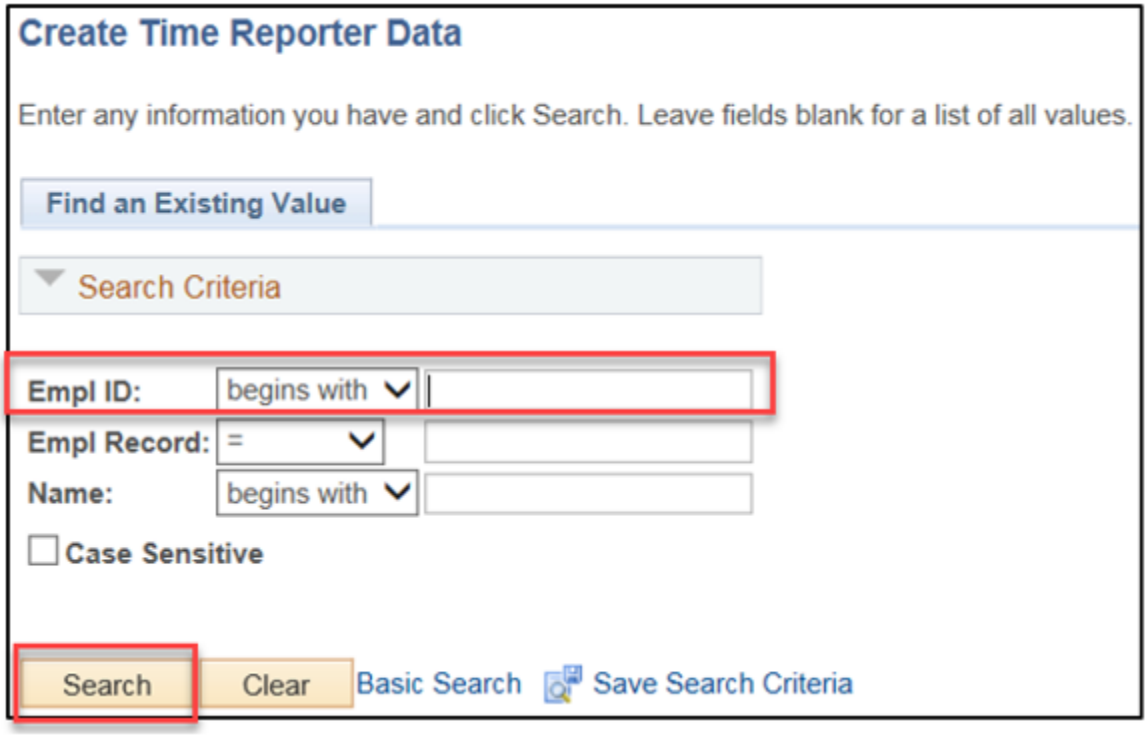


Or

2. From the PeopleSoft Main Menu (with the Time and Labor Specialist Role):

A. Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Create Time Reporter Data**

B. Enter the **Empl ID** and click **Search**

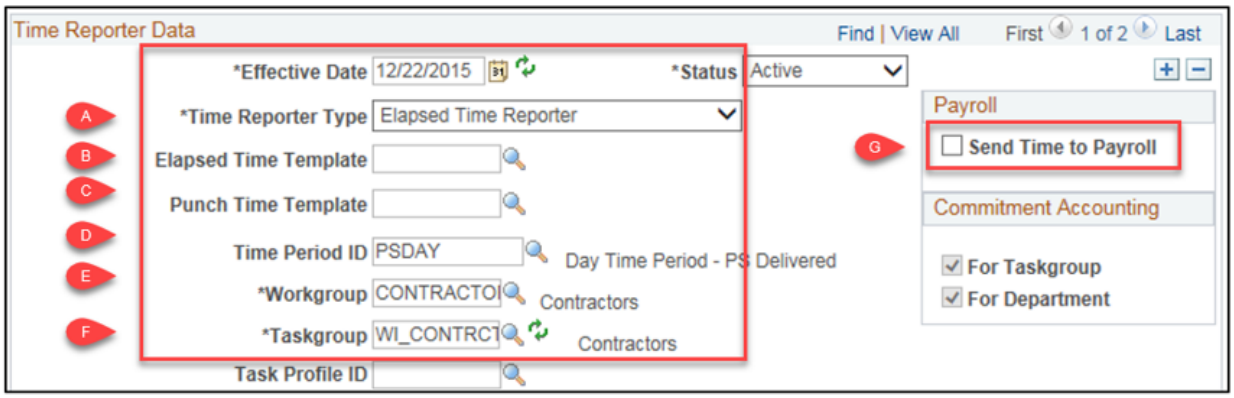


3. Enter the following:

A. **Time Reporter Type**: Select an appropriate value.

B. **Elapsed Time Template**: Enter if Elapsed Time Reporter was selected for Time Reporter Type.

C. **Punch Time Template**: Enter if Punch Time Reporter was selected for Time Reporter Type.
D. **Time Period ID:** PSDAY
E. **Workgroup:** Varies depending on type of contractor – See TAPFIN instructions below.
F. **Taskgroup**: Varies depending on type of contractor – See TAPFIN instructions below.
G. **Send Time to Payroll check box:** Unchecked



D. Click Save.

***Non-TAPFIN Contractors may have time reporter data set up smilar to regular employees. Certain values must be entered for TAPFIN Contractors.**

Time and Labor Setup - TAPFIN Contractors

For TAPFIN contractors, they must enter UserField 3 on the timesheet. UserField 3 presents their candidate ID, which is linked to a purchase order. TAPFIN provides a full list of candidate IDs on a regular basis. Only **APPROVED** time for a pay period will be send to TAPFIN during payroll processing week. TAPFIN cannot accept prior period adjustments or future time.

TAPFIN Contractors cannot be Task Profile reporters. TAPFIN contractors can be punch or elapsed time reporters. TAPFIN contractors can have task distribution required or optional on timesheet (but can only use speed types/combo codes) based on the taskgroup assignment.

Workgroup: ***CONTRACTOR***

Taskgroup options:
- WI_CONTRCT – combocode reporting optional
- WI_CTSPEED – combocode reporting required

- 505CTUSR35 – DOA TAPFIN Contractrors only


UserField 3 is required for the above taskgroups. Non-TAPFIN contractors should be assigned a different taskgroup as they will not have a candidate ID available in UserField 3.

There are 2 different time reporting templates for TAPFIN contractors:
- WI_PNCH3C
- WI_ELPS2C

EXAMPLES of TAPFIN Time Reporter Data

❖ **Punch time** -combocode **not required**:

1. Time Reporter Type = Punch Time Reporter
2. Punch Time Template = WI_PNCH3C
3. Time Period ID: PSDAY
4. Workgroup = CONTRACTOR
5. Taskgroup = WI_CONTRCT
6. Send to Payroll = Unchecked

❖ **Punch time** -combocode **required**:

1. Time Reporter Type = Punch Time Reporter
2. Punch Time Template = WI_PNCH3C
3. Time Period ID: PSDAY
4. Workgroup = CONTRACTOR
5. Taskgroup = WI_CTSPEED
6. Send to Payroll = Unchecked

❖ **Elapsed time** - combocode **not required**:

1. Time Reporter Type = Elapsed Time Reporter
2. Elapsed Time Template = WI_ELPS2C
3. Time Period ID: PSDAY
4. Workgroup = CONTRACTOR
5. Taskgroup = WI_CONTRCT
6. Send to Payroll = Unchecked

❖ **Elapsed time** -combocode **required**:

1. Time Reporter Type = Elapsed Time Reporter
2. Elapsed Time Template = WI_ELPS2C
3. Time Period ID: PSDAY

4. Workgroup = CONTRACTOR
5. Taskgroup = WI_CTSPEED
6. Send to Payroll = Unchecked

❖ **All DOA-DET TapFIN Contractors (except STAR)** will have the following Time Reporter Data:

1. Time Reporter Type = Elapsed Time Reporter
2. Elapsed Time Template = WI_ELPS2C
3. Time Period ID: PSDAY
4. Workgroup = CONTRACTOR
5. Taskgroup = 505CTUSR35
6. Send to Payroll = Unchecked

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.1.3 Adding a Person of Interest (POI)

Purpose
Definition
Adding A Person Of Interest

Purpose

This document explains the key topics involved in adding a person of interest into PeopleSoft. It provides context and step-by-step procedural guidance to perform the activities.

Definition

Person of Interest (POI): A person who is not an employee or contingent worker, but is of interest to the organization is a POI. An example of this type of organizational relationship is a volunteer.

Adding A Person Of Interest

Items with an asterisk (*) are required for entry. Entering additional information is highly recommended but at the discretion of your agency.

1. After ensuring the person is not already in the system by using the Person Search functionality, navigate to the Add a Person page.

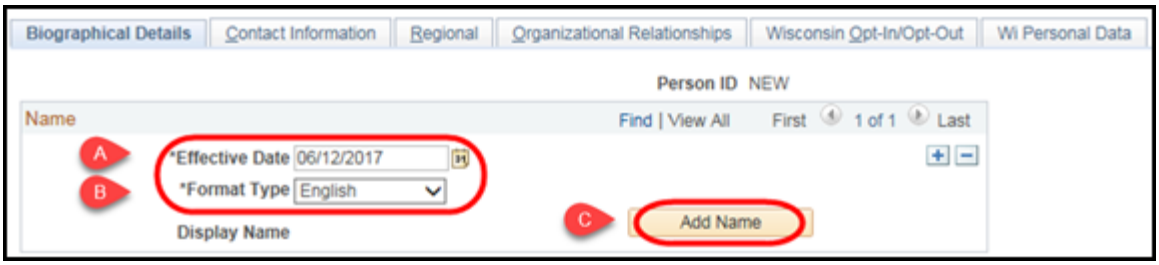
   Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Add a Person**

2. Click Add Person

   Do not change or add to the value of "NEW" in the Person ID field.

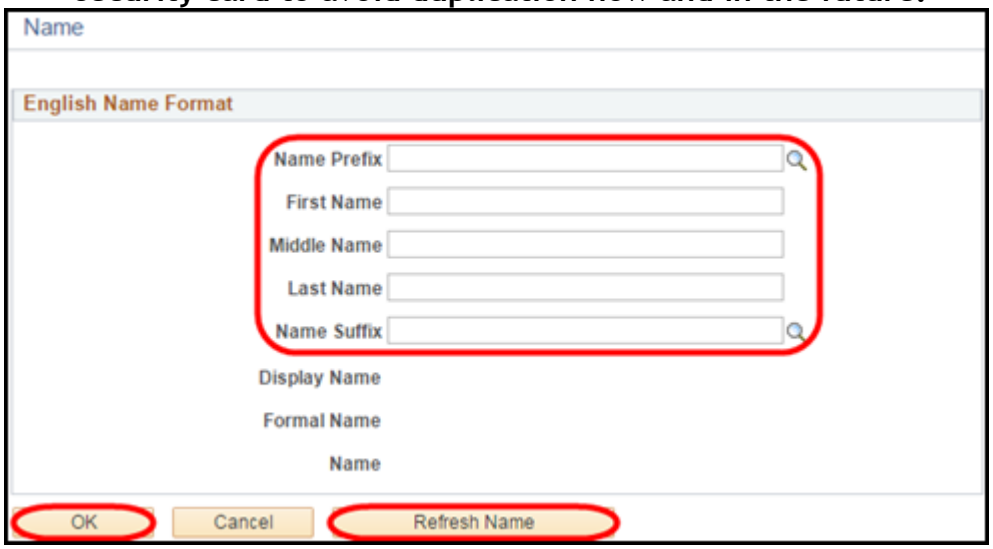


3. Input the following information in the Name section of the Biographical Details tab:
   A. ***Effective Date:** The date the POI relationship is effective
   B. ***Format Type:** English
   C. Click **Add Name** to enter the person's name



4. *Enter the person's name.

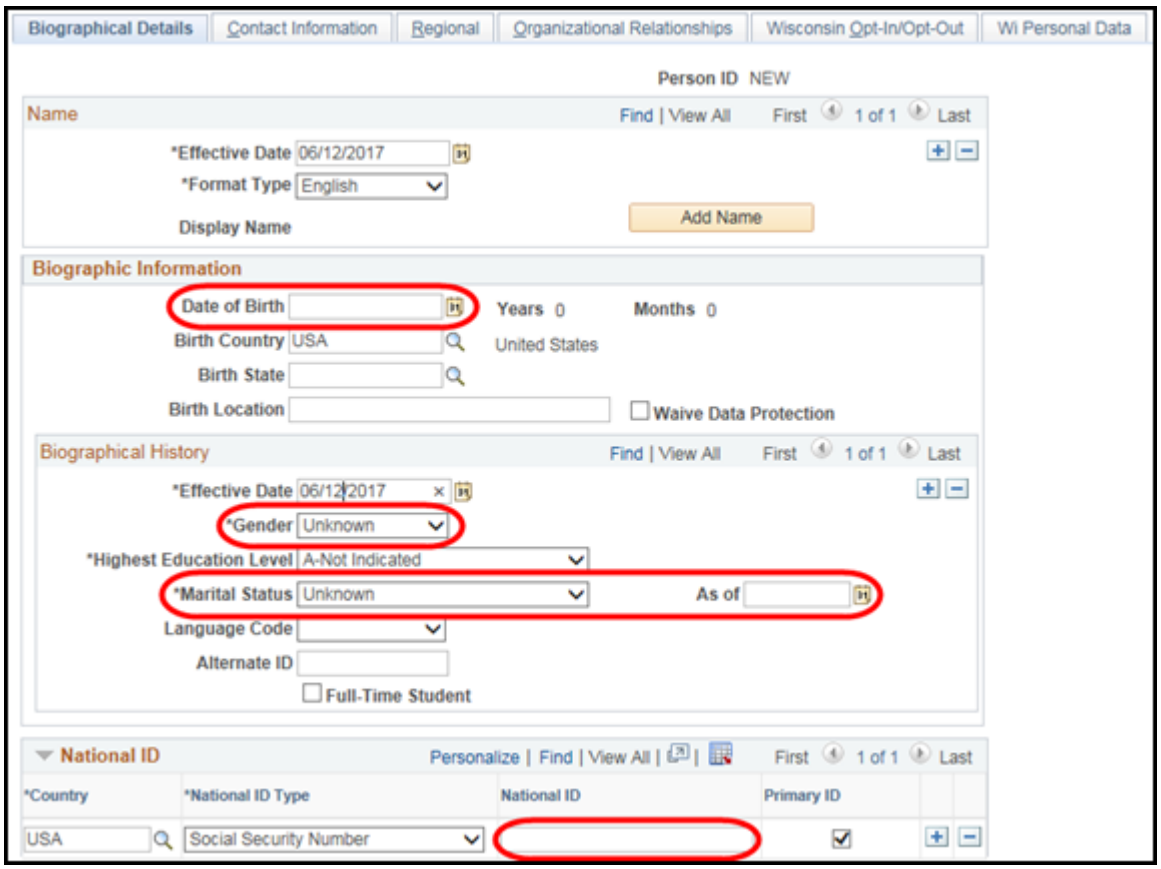
   If at all possible use the persons legal name as it appears on their social security card to avoid duplication now and in the future.



Click **Refresh Name**. **Note**: The information in the Display Name, Formal Name, and Name will populate.
Click OK.

5. If at all possible enter the persons DOB, Gender, and/or SSN to avoid duplication now and in the future.

   - ***Gender** is a required field and Unknown is an option.
   - ***Marital Status** should remain **Unknown** with no As of date.



6. Click on the Contact Information tab.



7. To add **Home Address** click **Add Address** on the Home Address Type Line.



To add a different Address Type click **Add a Row (+)** on the Home address line, select the Address Type from the drop down and click **Add Address Detail.**

8. Click **Add Address.**

9. Enter:

A. **Address**,

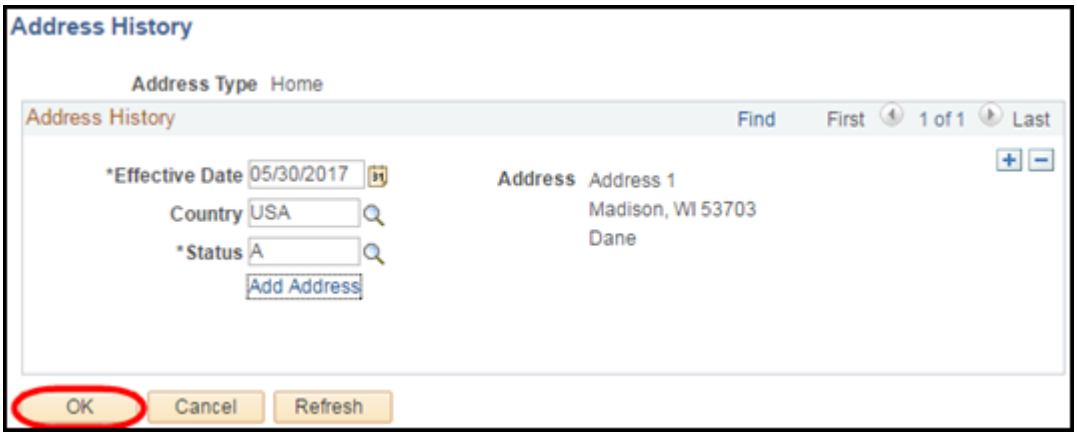
B. **City, State,** and

C. **Postal** (Zip Code)

D. Click **OK**



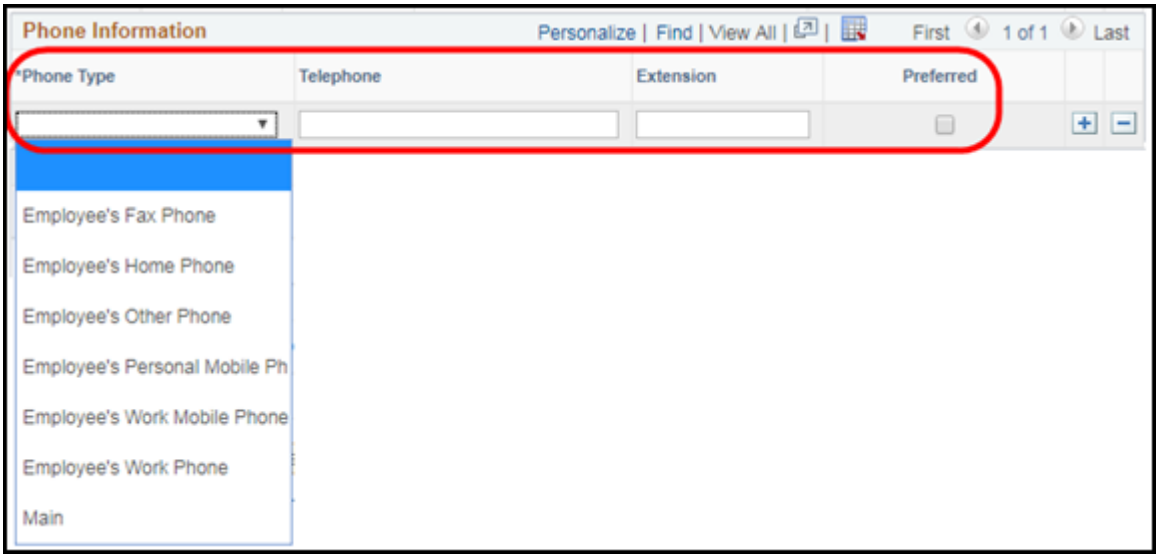
10. Click OK again.



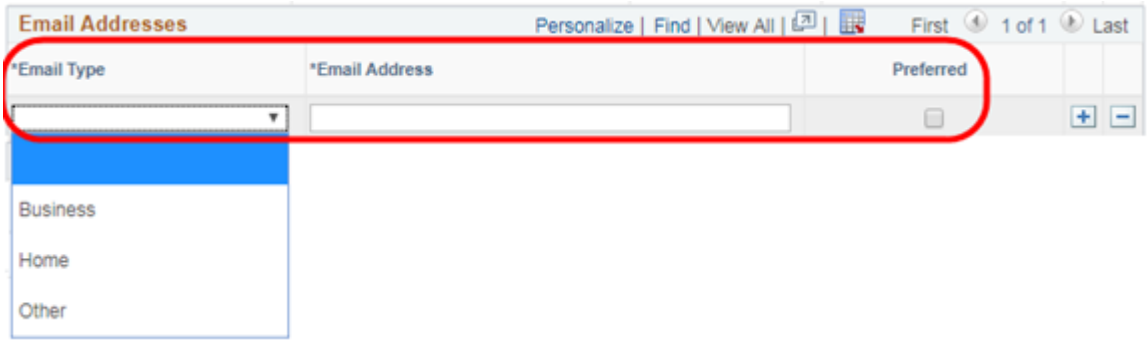
11. Click **Add Row (+)** to add another the Address Type if needed or **Delete Row (-)** to remove an unneeded address type.



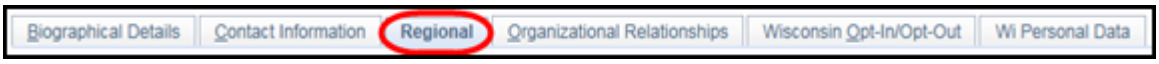
12. Select a value from the **Phone Type** list, enter the **Telephone** number, **Extension** (if applicable), and select the **Preferred** checkbox where appropriate.



13. Select a value from the **Email Type** list, enter the **Email Address,** and select the **Preferred** checkbox where appropriate.



14. Click the **Regional** tab.



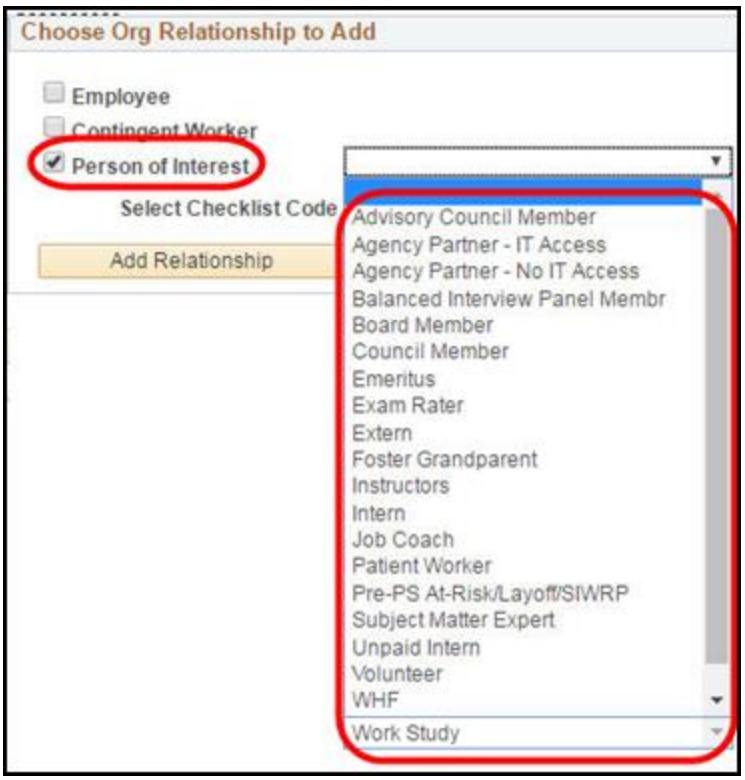
15. At least one ***Ethnic Group** must be selected and one must be indicated as ***Primary**.

If the person's ethnic group is unknown select the option of **Not Specified**. The **Primary** indicator must be checked.

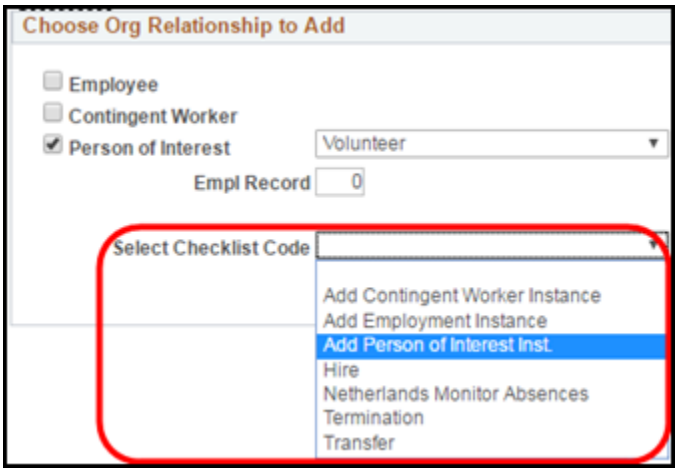
16. Click the ***Organizational Relationships** tab.



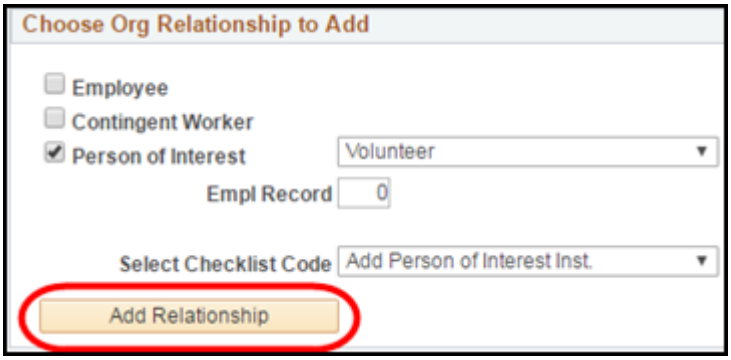
17. Select the **Person of Interest** checkbox. Select the **POI type.**



18. *Select **Checklist Code**: Add Person of Interest Inst.



19. Click **Add Relationship**.

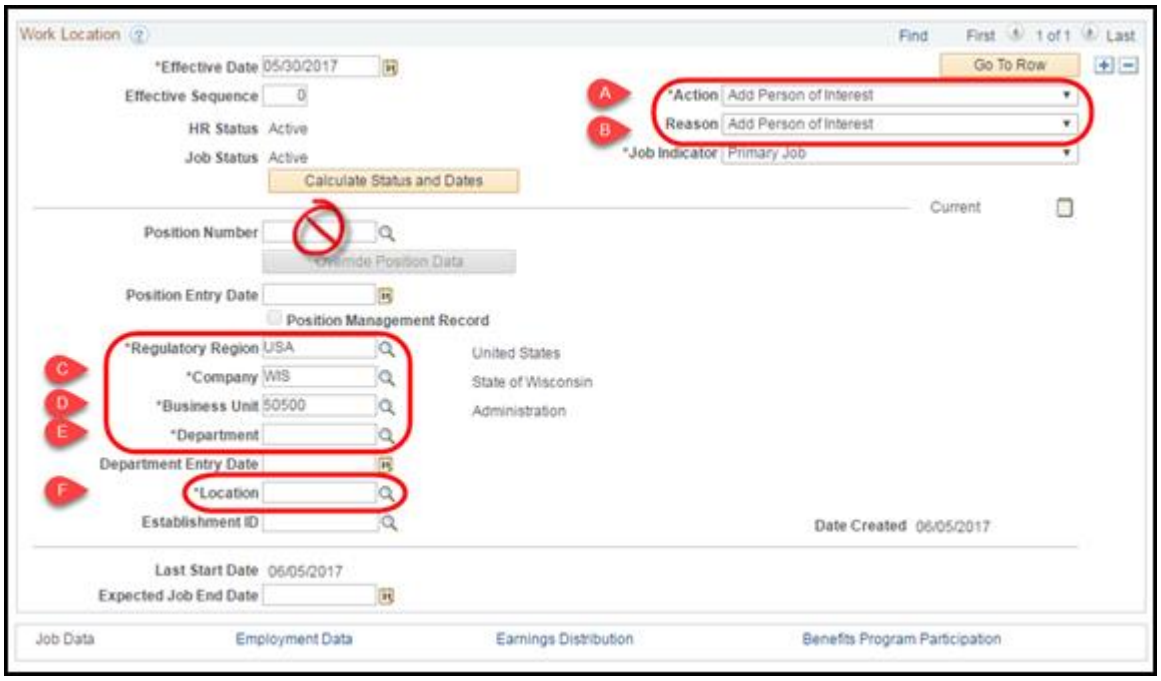


20. Verify the **Effective Date**, PeopleSoft should pass through the effective date of the POI you entered in the "Add a Person" page.
    A. Select Add Person of Interest from the ***Action** list
    B. Select Add Person of Interest from the ***Reason** list

POI's do not have a position number so the fields below must be entered manually.

Enter or select:

C. ***Company** (WIS),
D. ***Business Unit** (this will auto populate with 50500 so don't forget to change it to the appropriate business unit),
E. ***Department**, and
F. ***Location**

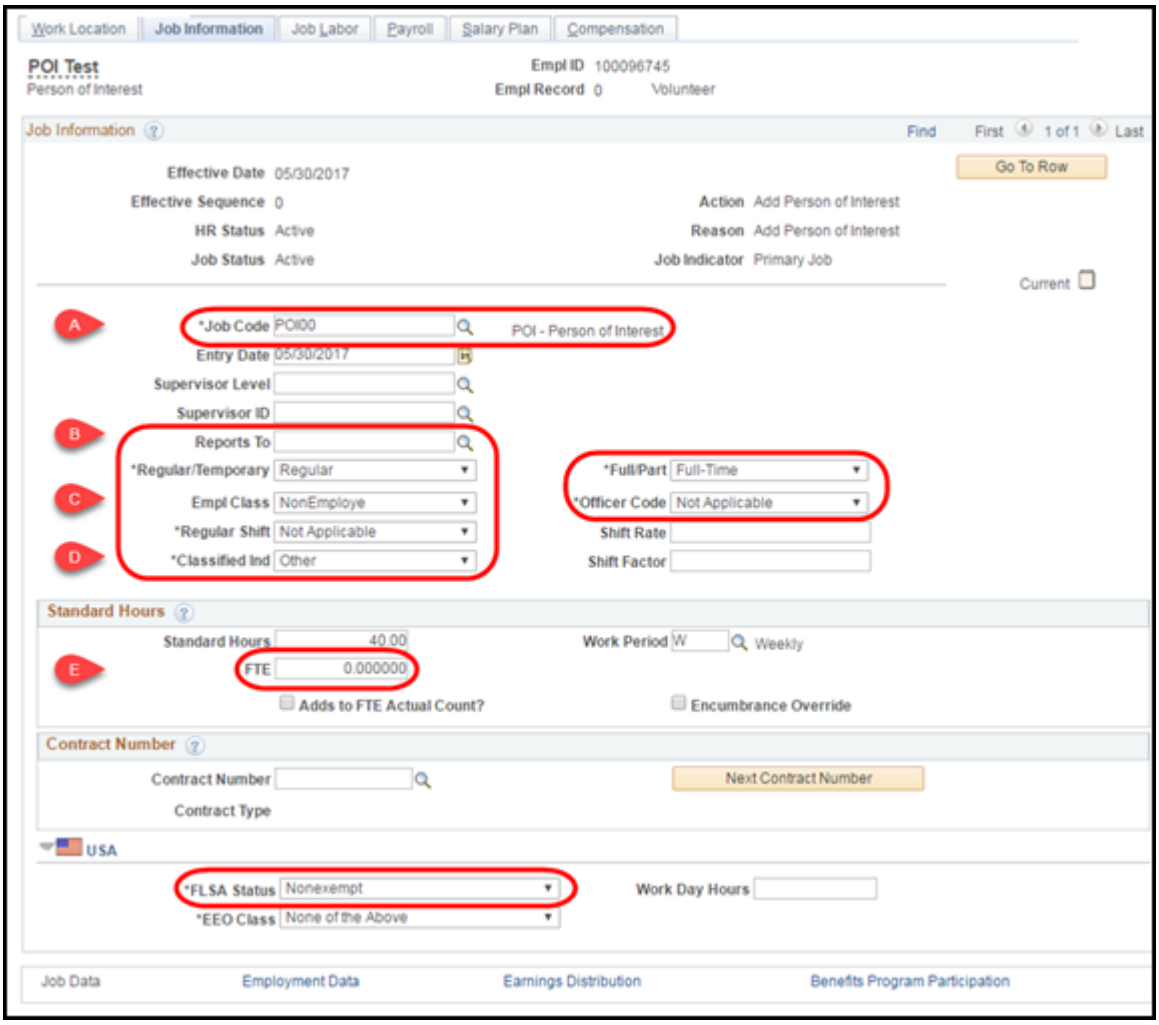


The **Department Entry Date** defaults to the **Effective Date.**

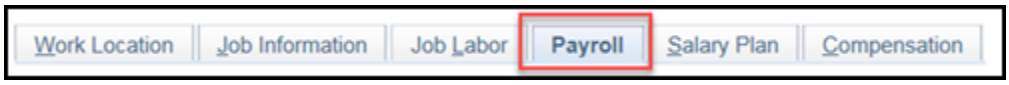
21. Click the **Job Information** tab.



22. Enter the following data into the listed fields:
    A. ***Job Code:** POI00
    B. **Reports To**: The position number of the POI's supervisor
    C. ***Empl Class**: NonEmployee
    D. ***Classified Ind:** Other
    E. ***FTE**: 0



23. Click on the **Payroll** tab.



24. Select Other from the ***Payroll System** list.



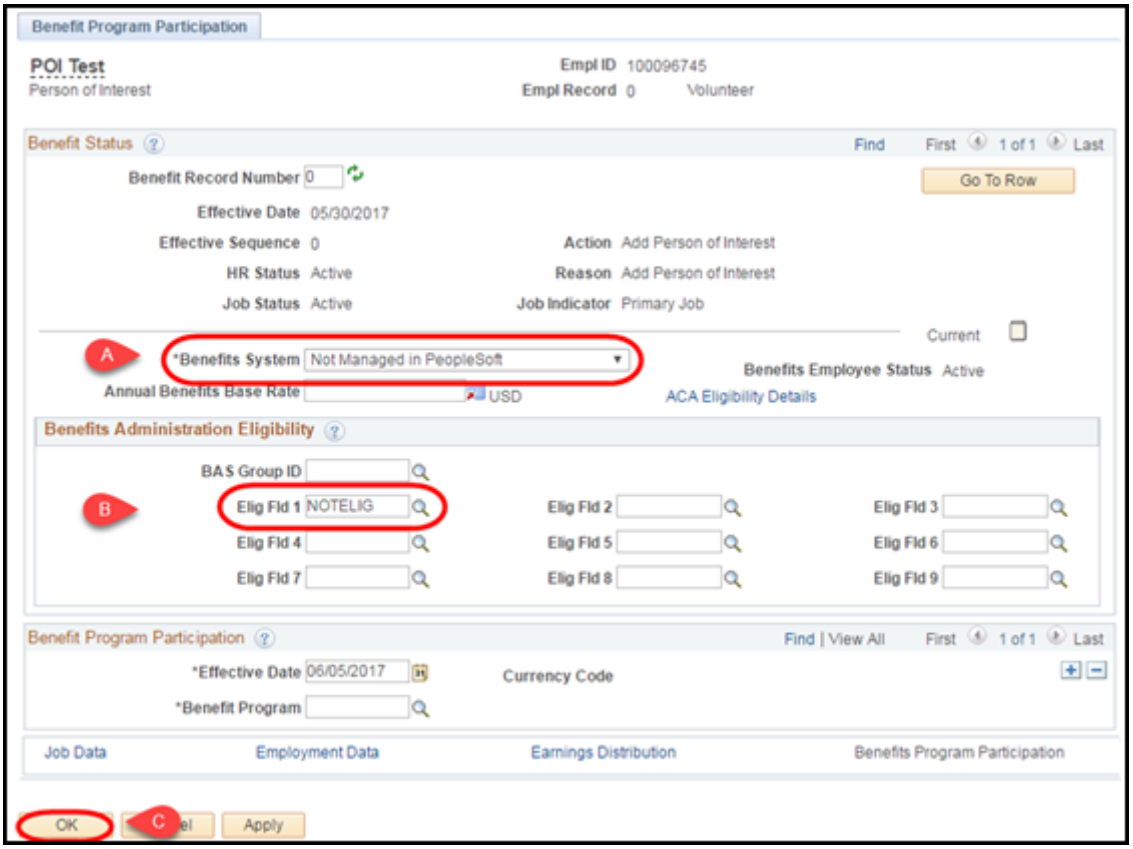
25. Enter your Agency 3-digit number in the ***Pay Group** field. Review and update the ***Tax Location Code** as needed.



26. Go to the **Benefit Program Participation** link.
    A. Select the ***Benefits System**: Not Managed in PeopleSoft.
    B. Enter NOTELIG (Not Eligible Default) into the ***Elig Fld 1** field.

    Verify all job data before finalizing

    C. Click **OK**.



27. Make note of the **Empl ID** for the new Person of Interest as needed.

Effective Date: 10/02/17

2.2 Employee Movement



State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

2.2.1 Transfer/Promotion/Demotion

Introduction
HR – Movements Within an Agency
    Update Job Data
    Compensation Change
HR – Movements Between Agencies
    Search for the Employee's Current Job Information
    Job Change Request ("People Stealer") – Transfer the Employee's Data to the "Receiving" Agency
    Update Job Data
    Compensation Change
HR – Compensation Changes (If Applicable)
HR – Update Person Profile – Probation
Time and Labor – Updating Time Reporter Data
Absence – Update Assigned Schedule
Benefits
Checklist: Transfer, Promotion, Demotion Within Agencies
Checklist: Transfer, Promotion, Demotion Between Agencies
Resources

Introduction

- The scope of the guide only covers those processes directly related to employee transfers
- Fields, icons, and buttons not addressed are either not being used by the State or are not applicable to the topic

- At the start of each process, the associated PeopleSoft security role is identified

HR - Movements Within An Agency

Role: Agency HR Specialist
Prior to entering a transaction moving an employee into a different position, the Agency Position Management Specialist may request updates to the position. This is done through the Position Request form. More information is available in the Viewing Position Data and the Position Updates job aids.

Employees should not be put into positions that have not been evaluated by the Agency Position Management Specialist.

Ensure information such as reports to, classification, FLSA, department ID, location, funding, etc. are all updated on the position prior to filling it. If updates are not made prior to filling it you must submit a STAR Support Ticket to have the position updates made. Do not add position data rows to make corrections to a position that should have been made prior to filling it.

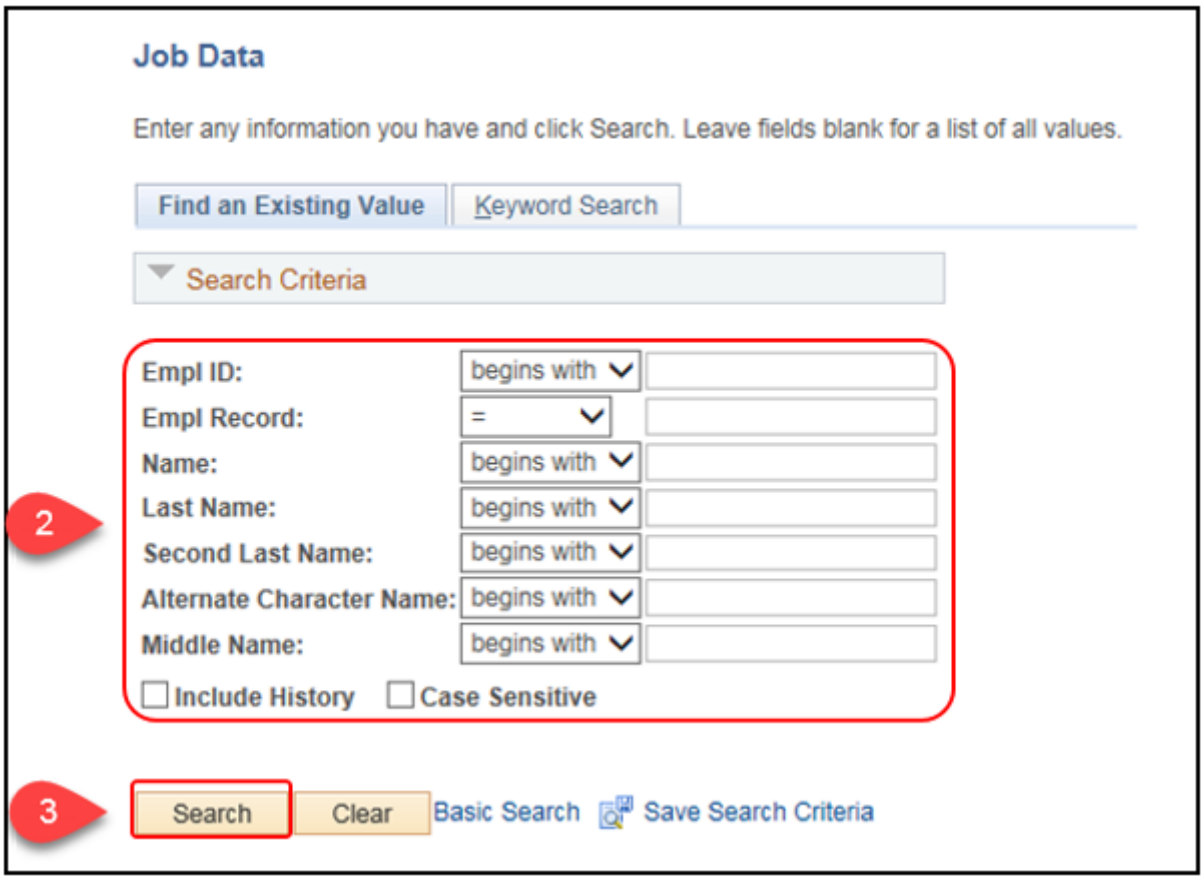
In addition to ensuring the position is updated, the agency must ensure the employees person data is updated prior to moving them into a different position. Employee movements can result in their business phone and email changing. This data should be updated in Person Data using the same effective date as the transaction.

Employees with an employee class of Permanent, who move into a different position number within the same Business Unit require a *transfer*, *promotion*, or *demotion* transaction on their job data.

Employees who move from one position to another when the employee class is different (Permanent Classified to Unclassified, Permanent Classified to *LTE*, etc.) cannot be transferred, promoted or demoted. A termination then rehire must be entered for these types of movements. See the scenarios and instructions for each type of movement in the 5.2 Action/Action Reason.

`Update Job Data`
STEP 1: Navigate to the Job Data page and locate the employee

1. Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**
2. Enter the desired search criteria in the **Find an Existing Value** tab
3. Click **Search**



4. If multiple employees result, click the desired employee from the **Search Results** list.

STEP 2: Add a row with the appropriate Action/Action Reason to the employee's Job Data record.

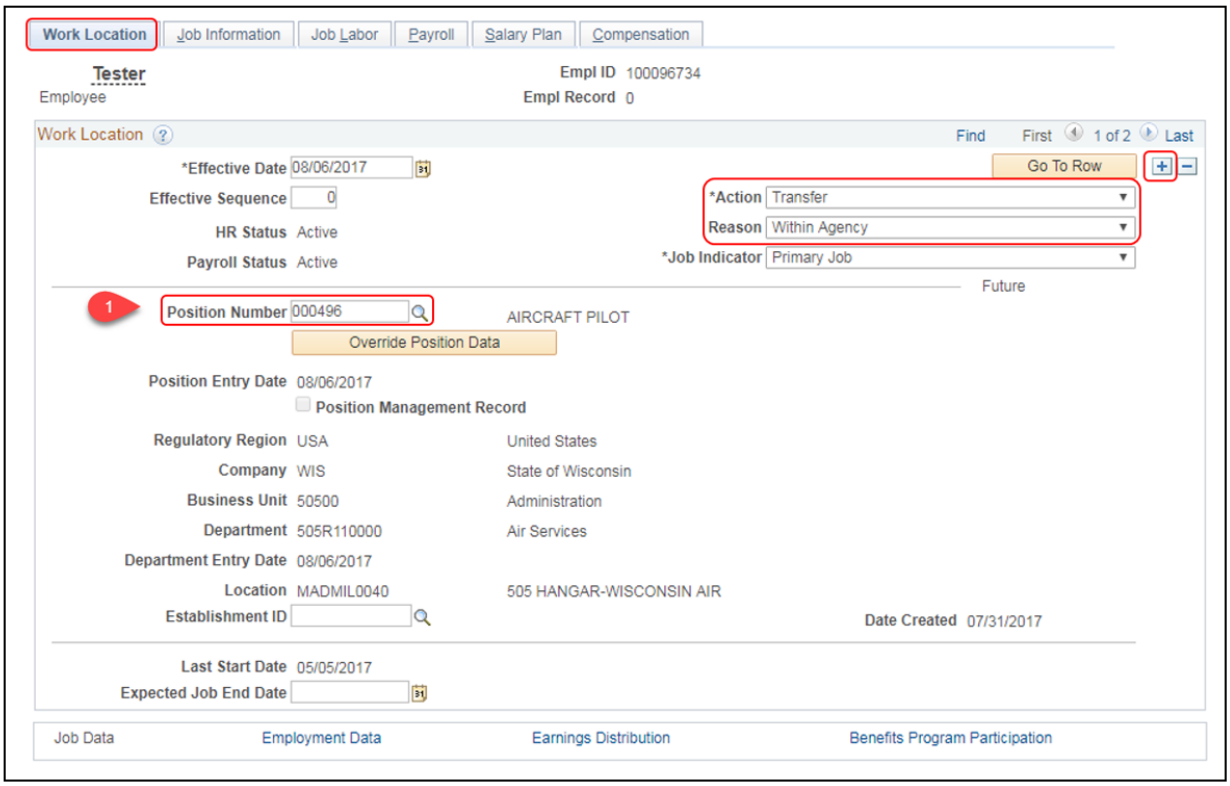
1. On the **Work Location** tab, click **Add a Row (+)**.
2. Enter or select the desired ***Effective Date** of the transfer.
3. Select *Transfer, Promotion, or Demotion* from the ***Action list** and select the appropriate reason from the ***Reason** list. See 5.2 Action/Action Reason for all available Actions and Reasons.

LTE and Project employee transfers may require multiple transactions.

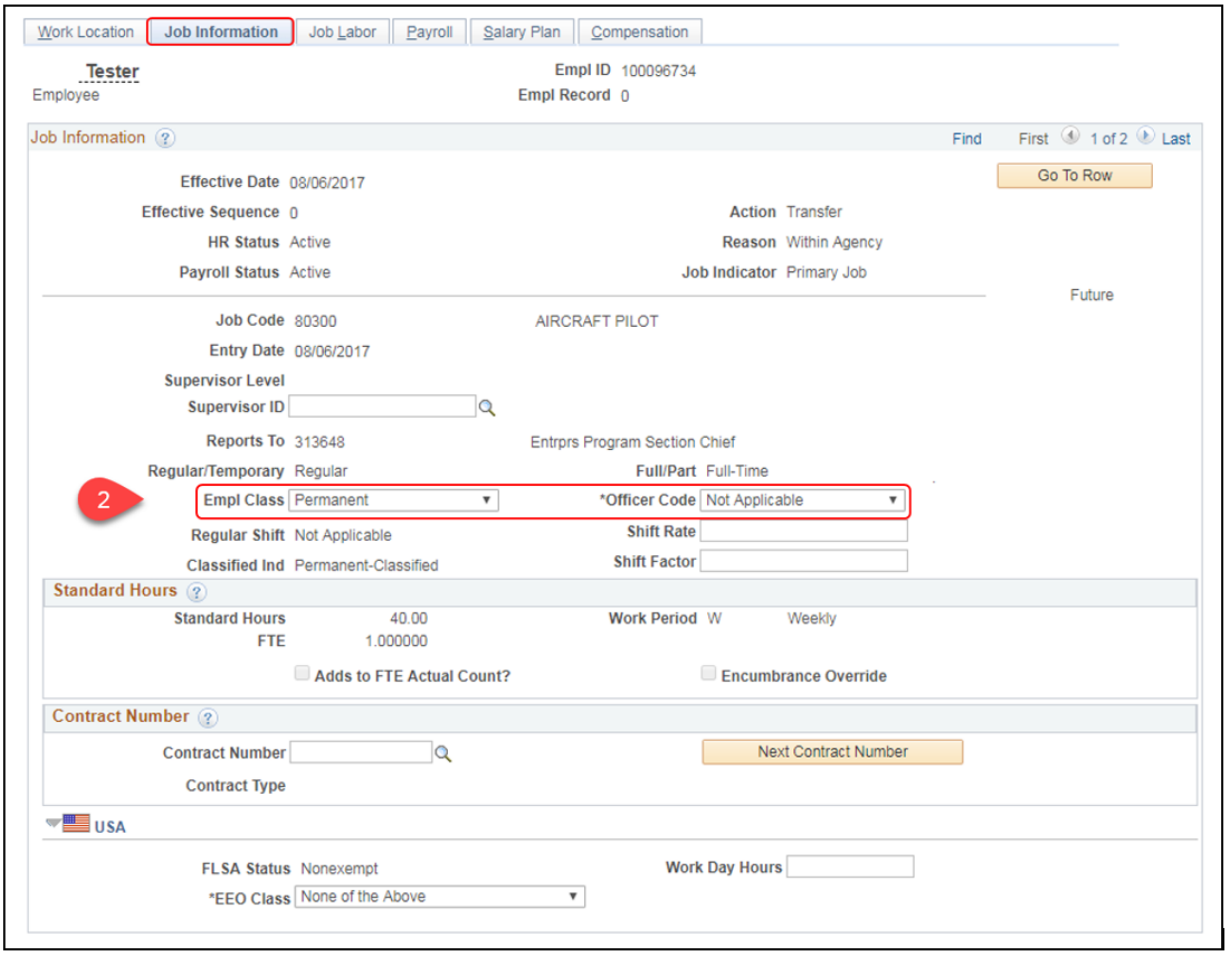
STEP 3: Update all necessary data on the employees Job Data pages to reflect the new position.

1. Enter the new position number in the ***Position Number** field. Corresponding position information updates when you tab out of the field.

If there are errors in any of the position data that populates, corrections need to be made on the position. Positions should be updated prior to putting an employee into them. If corrections are needed after putting an employee in a position a STAR Support Ticket is required. Do not add rows to correct job or position data.

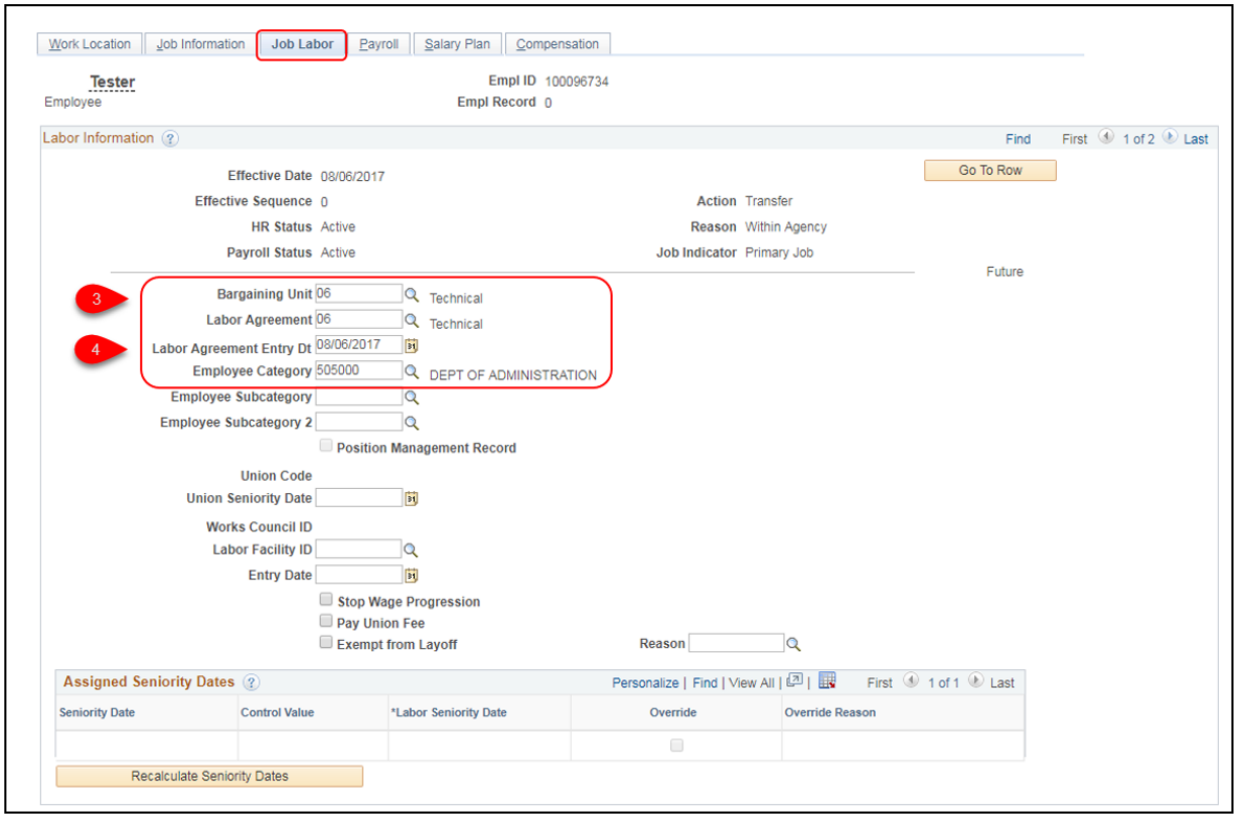


2. On the **Job Information** tab, review the ***Empl Class** and ***Officer Code** and update, if necessary.

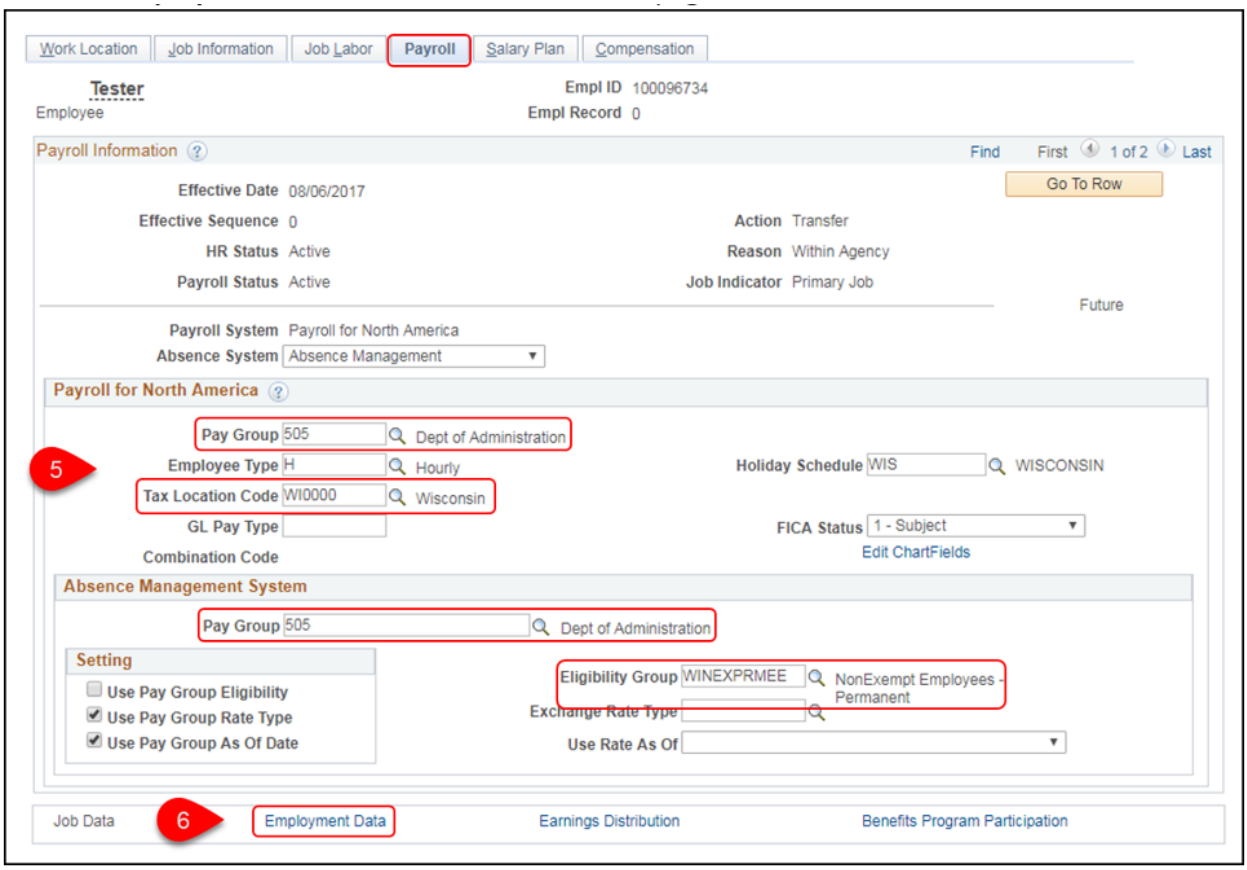


If there are errors in any of the position data that populates, corrections need to be made on the position. Positions should be updated prior to putting an employee into them. If corrections are needed after putting an employee in a position a STAR Support Ticket is required. Do not add rows to correct job or position data.

3. On the **Job Labor** tab, review the ***Bargaining Unit, *Labor Agreement,** and ***Employee Category** and update, if necessary.
4. Update the ***Labor Agreement Entry Dt** to the date of the promotion, demotion, or transfer.

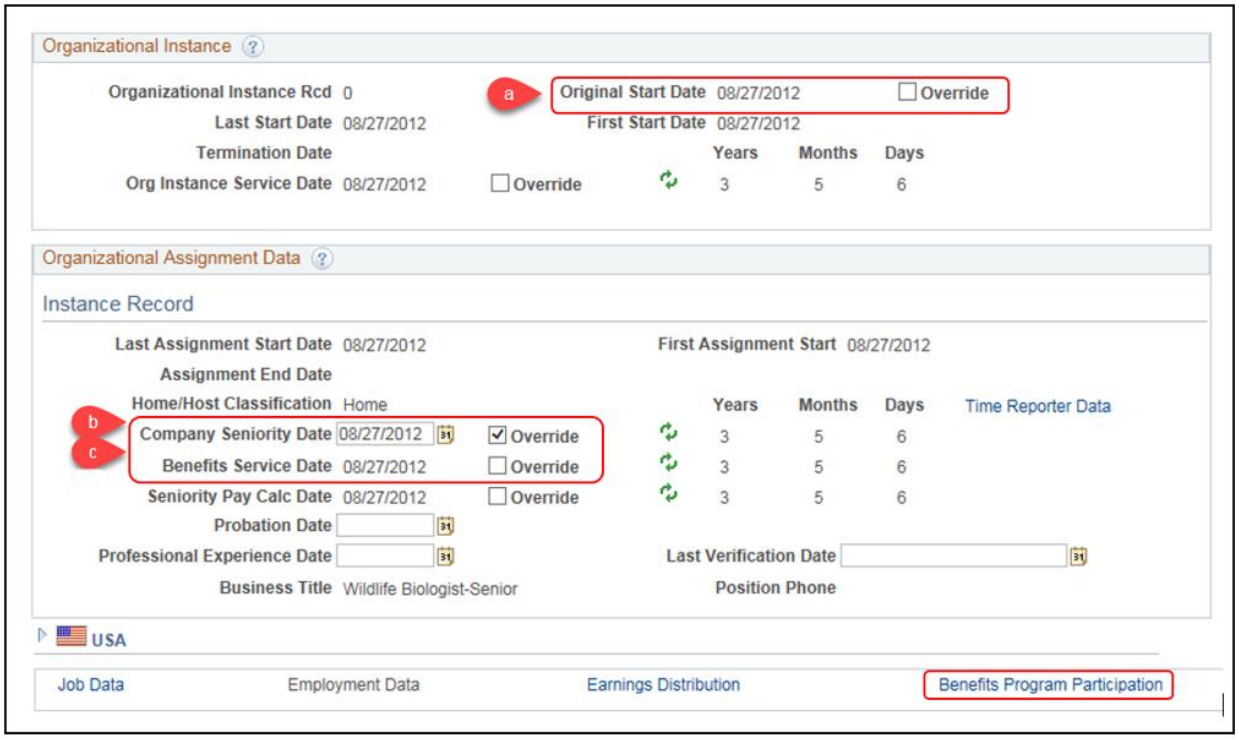


5. On the **Payroll** tab, review the ***Pay Group, *Tax Location Code,** and **Absence *Eligibility Group** fields and update, if necessary. Remember if the FLSA status changed the Eligibility Group must match the new status.
6. Click the **Employment Data** link at the bottom of the page.

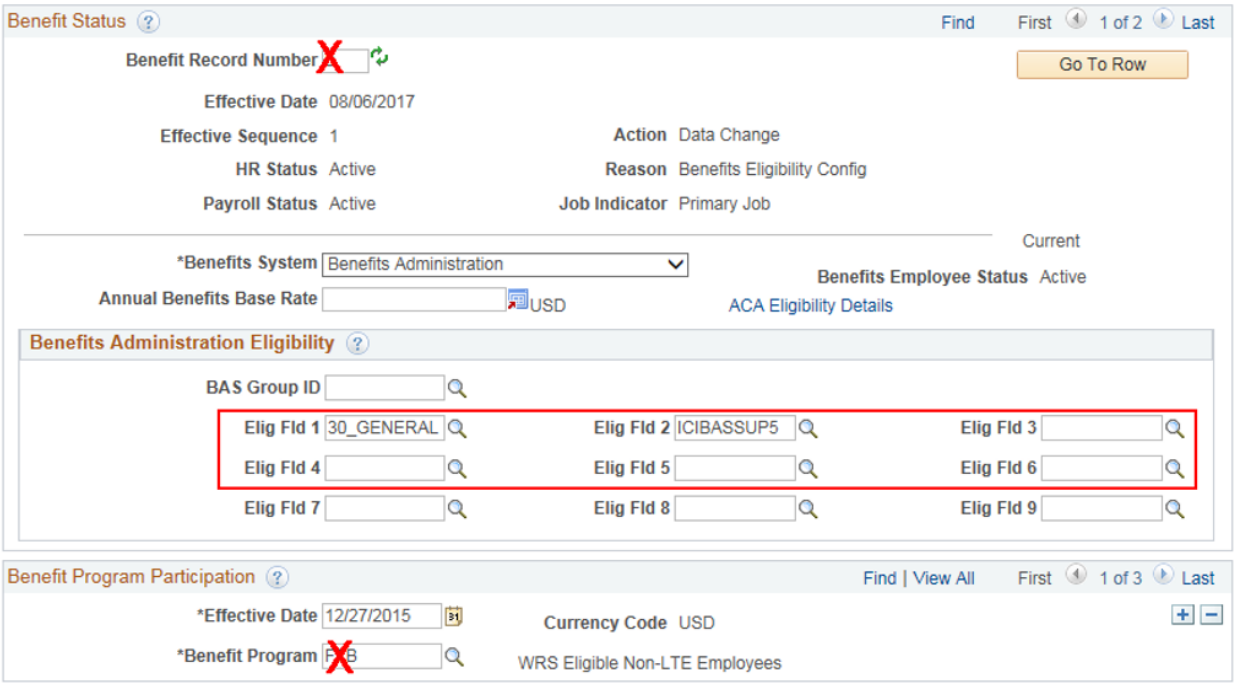


7. Review the following fields and update, if necessary, by clicking the **Override** checkbox to access the date fields.
    a. ***Original Start Date:** Identifies the date the employee began in unclassified service, or as a permanent employee in classified service. This is State-wide service, not single Agency service.
    b. ***Company Seniority Date:** Identifies the adjusted *continuous service* date and drives an employee's vacation accrual rate
    c. ***Benefits Service Date**: Usually identifies the employee's WRS start date and is used to calculate eligibility for employer contribution towards health insurance. **NEVER** update this value if the employee was already covered by the WRS prior to the transfer, promotion, or demotion.

Seniority Pay Calc Date: This field is not used by the State.



8. Click the **Benefits Program Participation** link at the bottom of the page.
9. DO NOT update the benefit record or the Benefit Program.
10. Review the **Elig Fld** fields. Work with your agency benefits specialist to determine if any updates are needed.



a. If no updates are needed, move on to next step

b. If updates are needed, **DO NOT update the fields on the transaction row.** Add a sequenced row to job data with an Action = Data Change and Reason = Benefits Eligibility Config. Update Elg Fld values on the Data Change row. This will create an ELG event so if changes are needed to any benefits, this event can be used to make the updates.



Elg Fld Descriptions

11. ***Elig Fld 1**: (Required) Enter a WRS Category, or code for why the employee is NOT eligible for WRS
    a. If the WRS category is changed, the WRS Auto-Enroll process will enroll the employee in the correct WRS benefit plan.
    b. If the employee is moving between non-Protective and Protective WRS categories and is enrolled in AD&D, the AD&D enrollment must be corrected. Create an SSO ticket in this situation.
12. **Elig Fld 2:** (Required field if the employee is WRS eligible) ICI category and eligibility
    a. Do not update this field upon movement unless the employee was previously not eligible for the WRS.
13. **Elig Fld 3:** There must be a value in this field for all WRS-covered LTEs indicating their eligibility for the employer contribution towards health insurance. This field is also used for employees who have pre-tax premium waiver on file.
14. **Elig Fld 4:** The value entered here tracks the first time an employee was offered ICI coverage through deferred enrollment - NEVER update this field
15. **Elig Fld 5:** The value entered here identifies grandfathered employees enrolled in 50%SGL Supplemental Plan and/or employees who have State Group Life or ICI *disability* premium waivers in effect
    - This field should not be updated upon movement

Compensation Change

If the transfer, promotion, or demotion includes a pay rate change, continue to the HR – Compensation Changes section.

HR - Movements Between Agencies

Search for the Employee's Current Job Information

Important

- All steps of the Transferring Between Agencies process are completed by the "receiving" Agency
- The "sending" agency has no PeopleSoft process to complete
- Both agencies, however, should communicate outside of PeopleSoft on the timing of the transfer
    - Prior to the transfer, the employee needs to have all time for their old job entered
    - Employee's data should not be transferred to the new agency until the sending agency has confirmed that there are no issues with the employee's timesheet
- Employees should not be stolen until the Wednesday of the week they start unless another date is agreed upon by the "sending" agency

Role: Agency HR Specialist

Prior to entering a transaction moving an employee into a different position, the Agency Position Management Specialist may request updates to the position. This is done through the Position Request form. More information is available in the Viewing Position Data Job Aid and 3.5.3 Position Updates.

Employees should not be put into positions that have not been evaluated by the Agency Position Management Specialist.

Ensure information such as reports to, classification, FLSA, department ID, location, funding, etc. are all updated on the position prior to filling it. If updates are not made prior to filling it you must submit a STAR Support Ticket to have the position updates made. Do not add position data rows to make corrections to a position that should have been made prior to filling it.

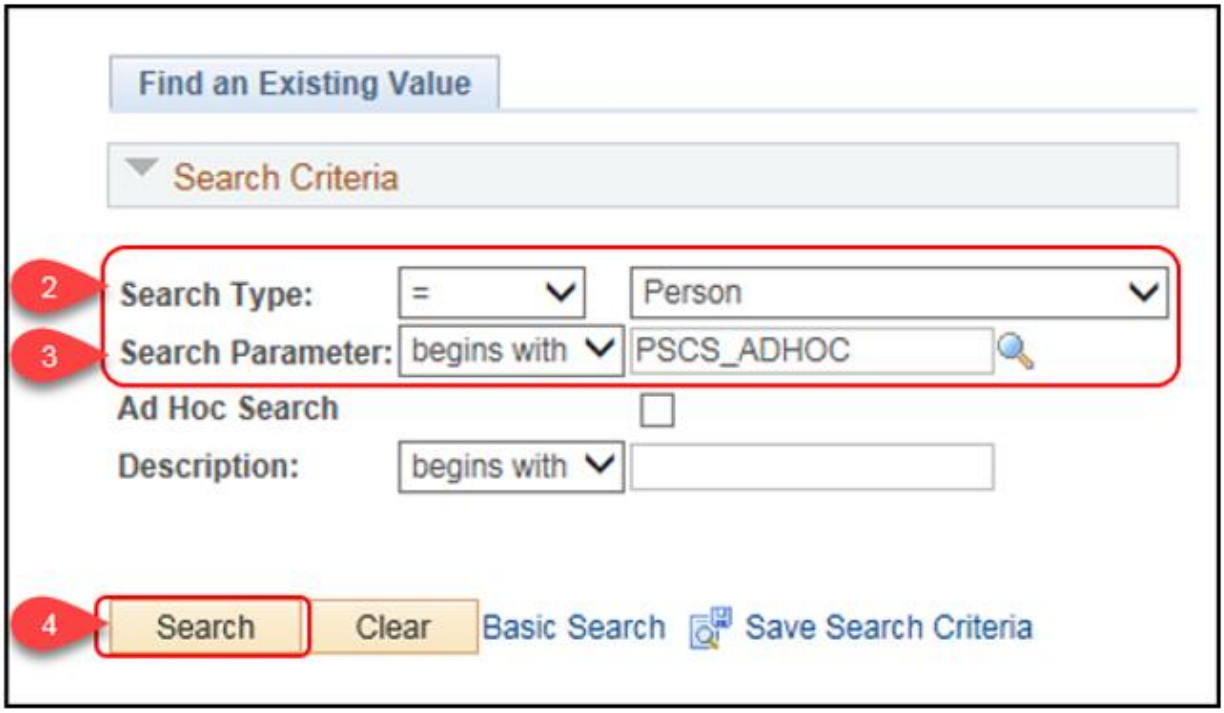
In addition to ensuring the position is updated, the agency must ensure the employees person data is updated prior to moving them into a different position. Employee movements can result in their business phone and email changing. This data should be updated in Person Data using the same effective date as the transaction.

Employees with an employee class of Permanent, who move into a different position number in a different Business Unit require a transfer, promotion, or demotion transaction on their job data.

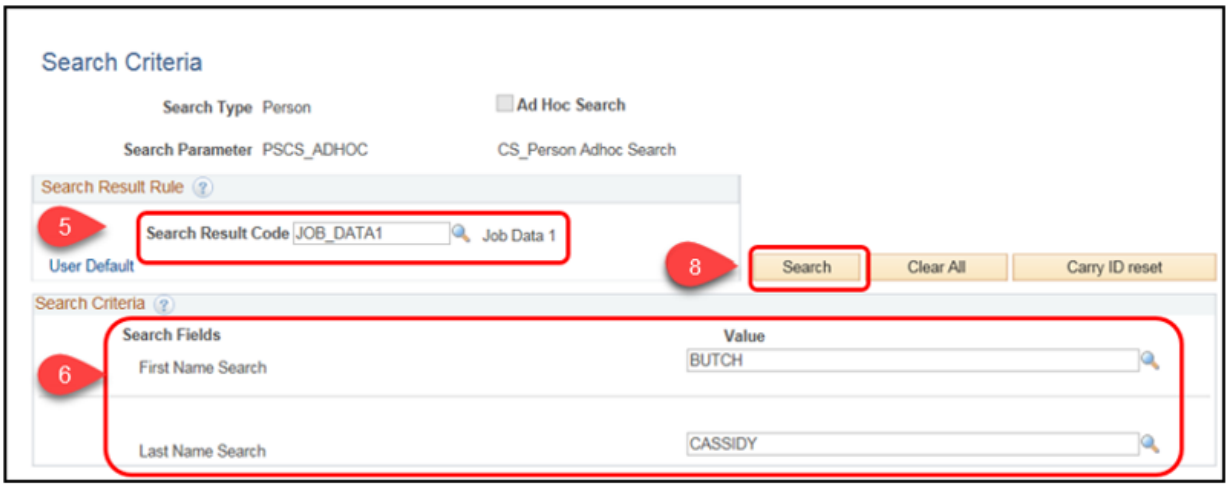
Employees who move from one position to another when the employee class is different (Permanent Classified to Unclassified, Permanent Classified to LTE, etc.) cannot be transferred, promoted or demoted. A termination then rehire must be entered for these types of movements. See the scenarios and instructions for each type of movement in 5.2 Action/Action Reason.

STEP 1: Navigate to the Search for People page and locate the transferring employee

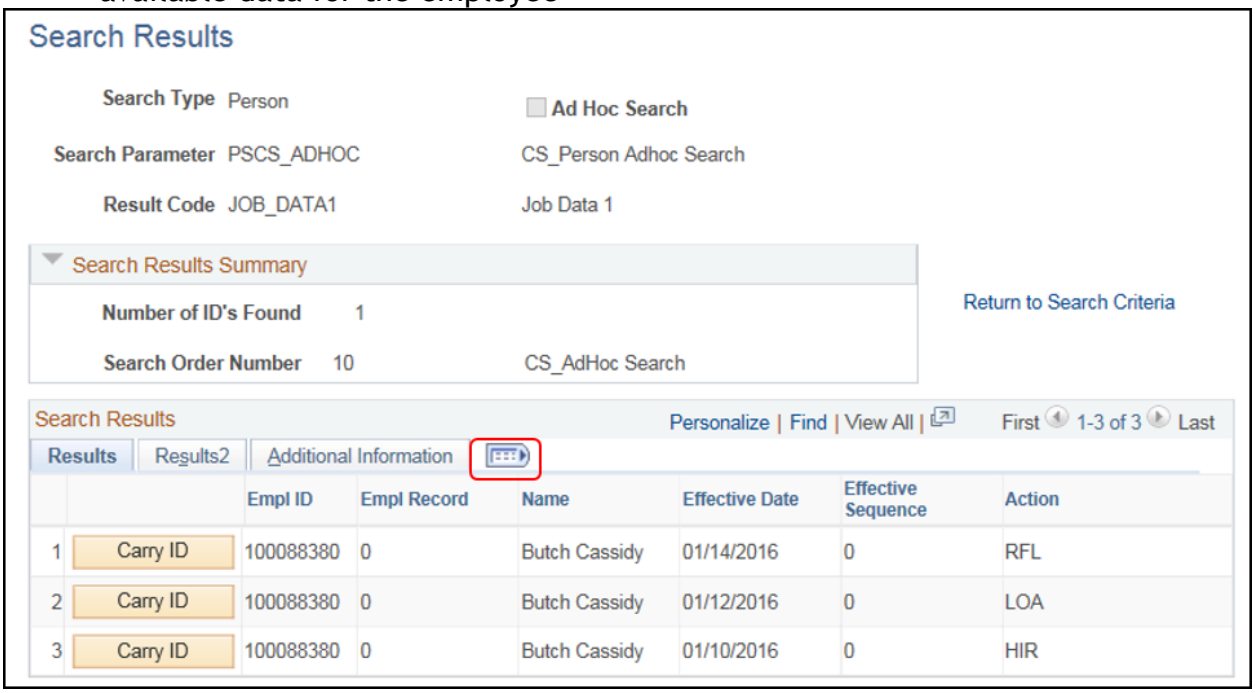
1. Navigation: **Main Menu > Workforce Administration > Personal Information > Search for People**
2. Select Person from the **Search Type** list
3. Select or enter PSCS_ADHOC for the **Search Parameter**
4. Click **Search**



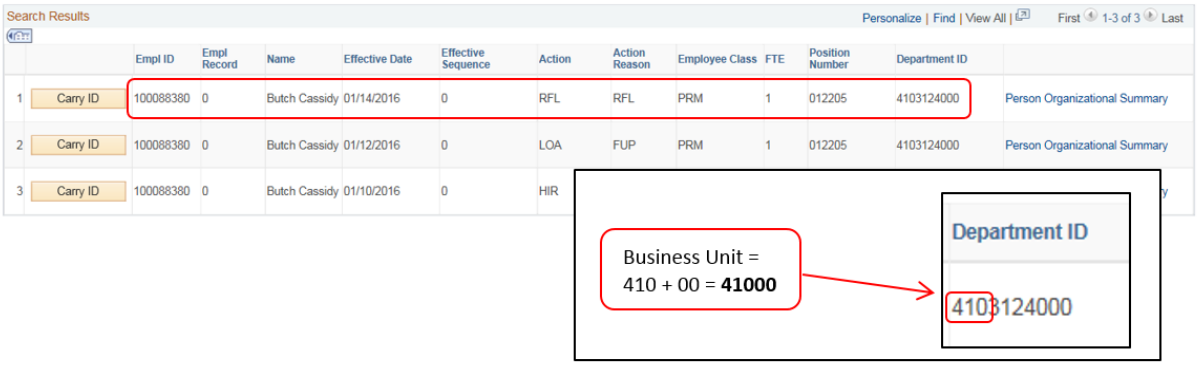
5. Enter or Select *JOB_DATA1* for the Search Result Code
6. Enter **First Name** and Last Name. The name must be entered as it was entered in PeopleSoft originally, but is not case sensitive
7. Press **[Enter]** on the keyboard to activate the Search button
8. Click **Search**



9. Search Results displays any matching names. If multiple employees are listed, be certain to locate the desired employee by **Empl ID** or other identifying data.
10. In the Search Results section, click the **Show All Columns** button to view all available data for the employee



11. Look at the most recent row, which has the most recent Effective Date and highest Effective Sequence
12. Document the following:
    a. **Empl ID**
    b. **Business Unit:** In most cases this is determined by the first thee (3) digits of the Department ID, plus two zeros. Verify the Business Unit with the "sending" agency if needed.
    c. **Department ID**



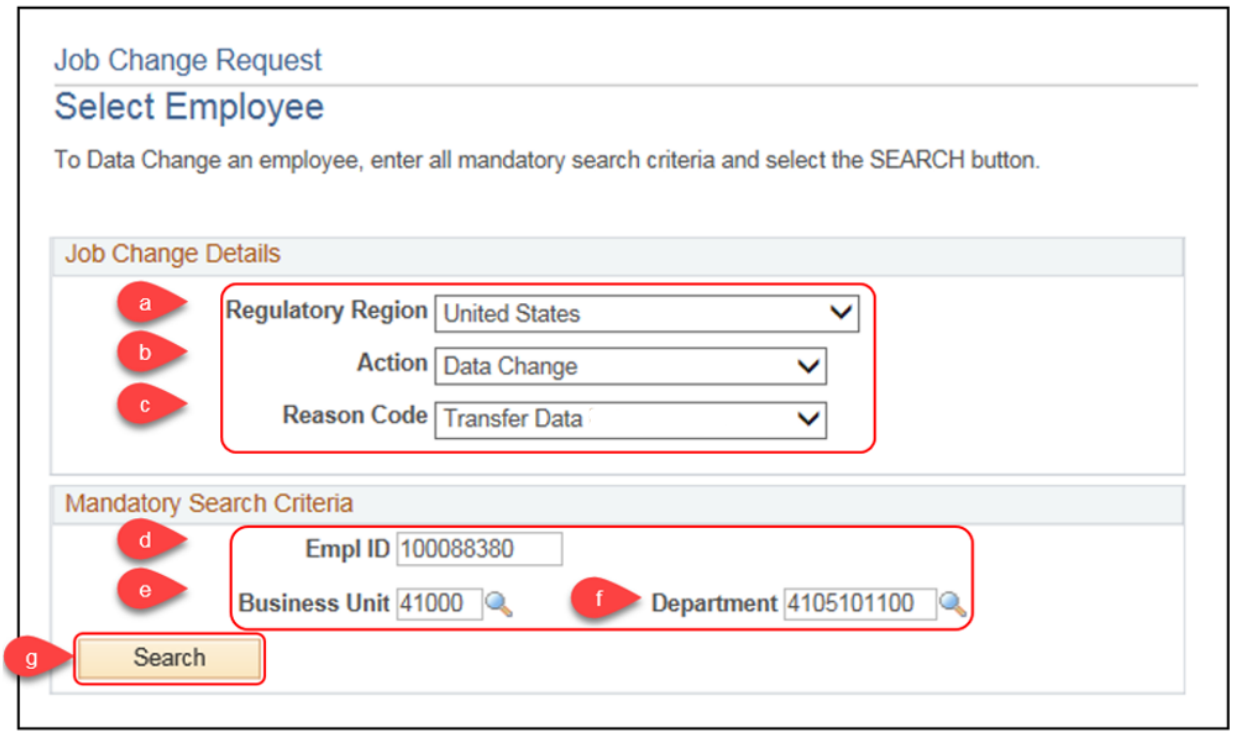
Job Change Request ("People Stealer") – Transfer the Employee's Data to the "Receiving" Agency

IMPORTANT: The functionality of the Job Change Request, is only to move the employee's data into your agency/departmental security. This is NOT the personnel transaction. Additional steps are required to enter the personnel transaction of transfer, promotion, or demotion.

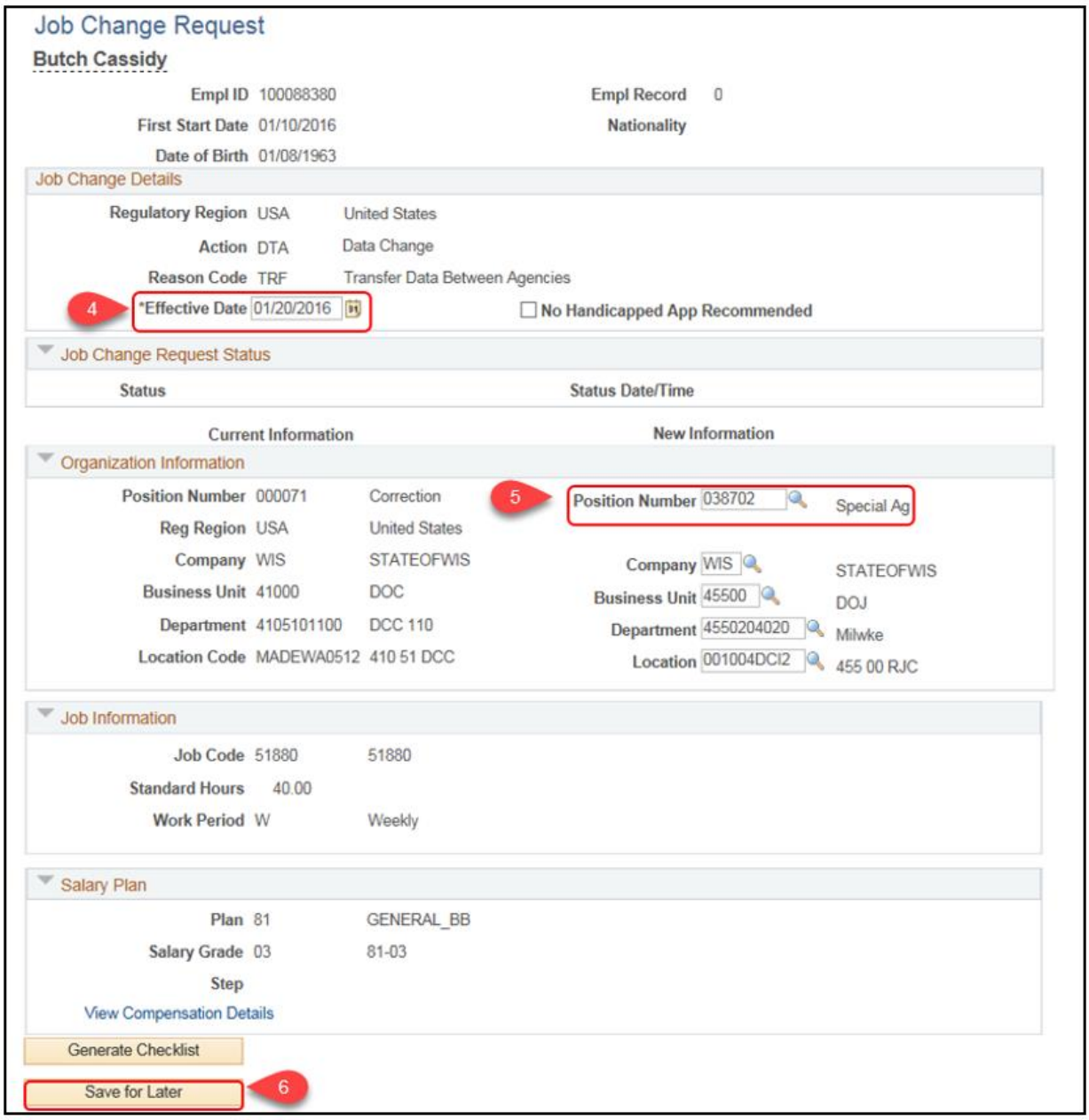
Role: HR Personnel Roster Role

STEP 1: Navigate to the Job Change Request page and enter criteria for the data transfer.

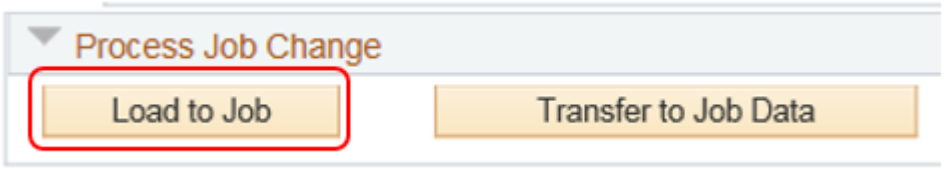
1. Navigation: **Main Menu > Workforce Administration > Job Information > Request Job Change**
2. Enter the following:
    a. **Regulatory Region**: United States
    b. **Action**: Data Change
    c. **Reason Code**: Transfer Data
    d. Enter the transferring employee's **Empl ID** noted from the Search page
    e. Enter or select the employee's current **Business Unit** noted from the Search page
    f. Enter or select the employee's current **Department** noted from the Search page
3. Click **Search**



4. Enter the ***Effective Date** of the data transfer
5. In the **Organization information** section, enter the NEW position number in the ***Position Number** field on the right hand side. The left hand side shows the current (old) position number for reference. The ***Company, *Business Unit, *Department** and ***Location** for the new position will autofill.
    a. If any of the information that populates is incorrect, do NOT alter the information. Abort the Job Change Request and update the position to the correct information. Refer to 3.5.2 Creating Position Data for assistance. After the position is corrected, then perform the Job Change Request.
6. Click Save for Later



7. Click **Load to Job**



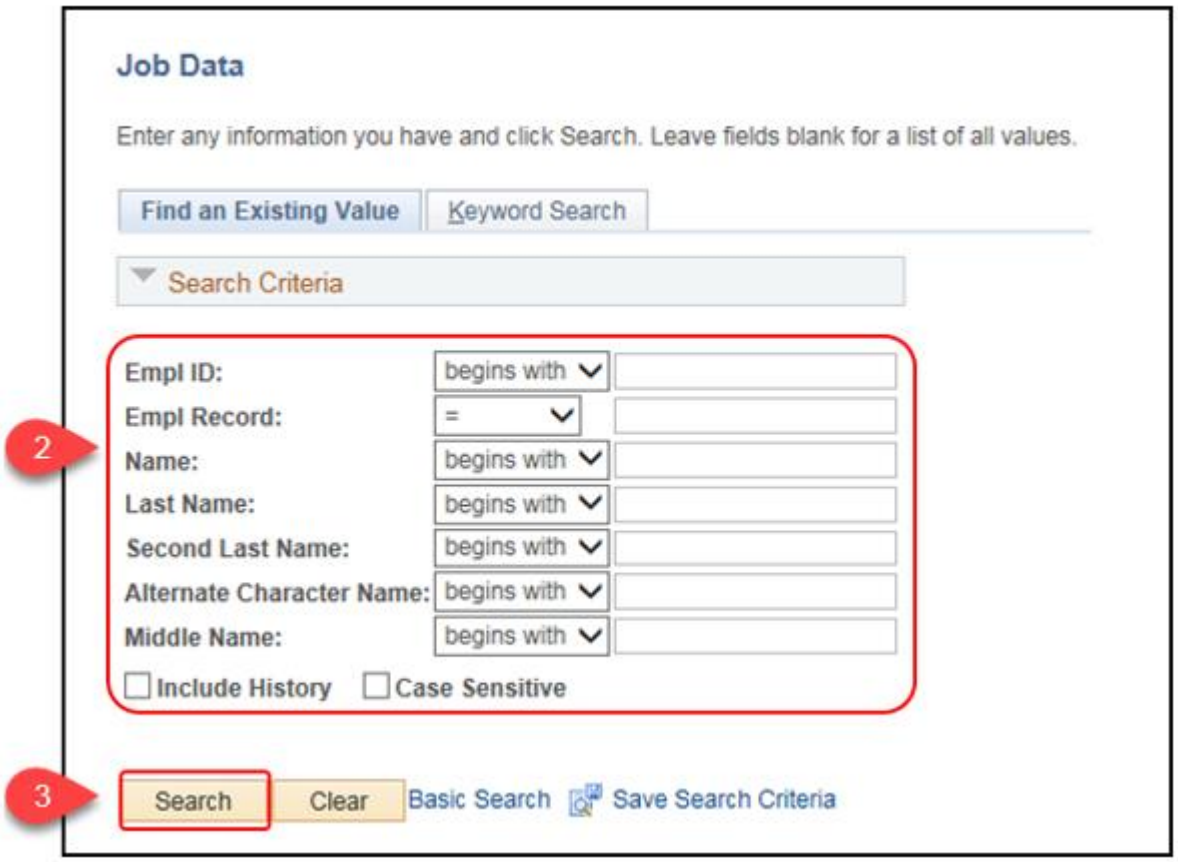
Load to Job places a new row with the Action of Data Change and the Reason of Transfer Data on the employee's job record along with updating the employee's position number (and the information associated with it.) Ultimately, this step moves an employee from one agency's security into the receiving agency's security on the effective date.

`Update Job Data`
Role: Agency HR Specialist

After the data transfer has been entered via the Job Change Request ("People Stealer"), a transfer/promotion/demotion row needs to be entered on the employee's job data.

STEP 1: Navigate to the Job Data page and locate the transferring employee

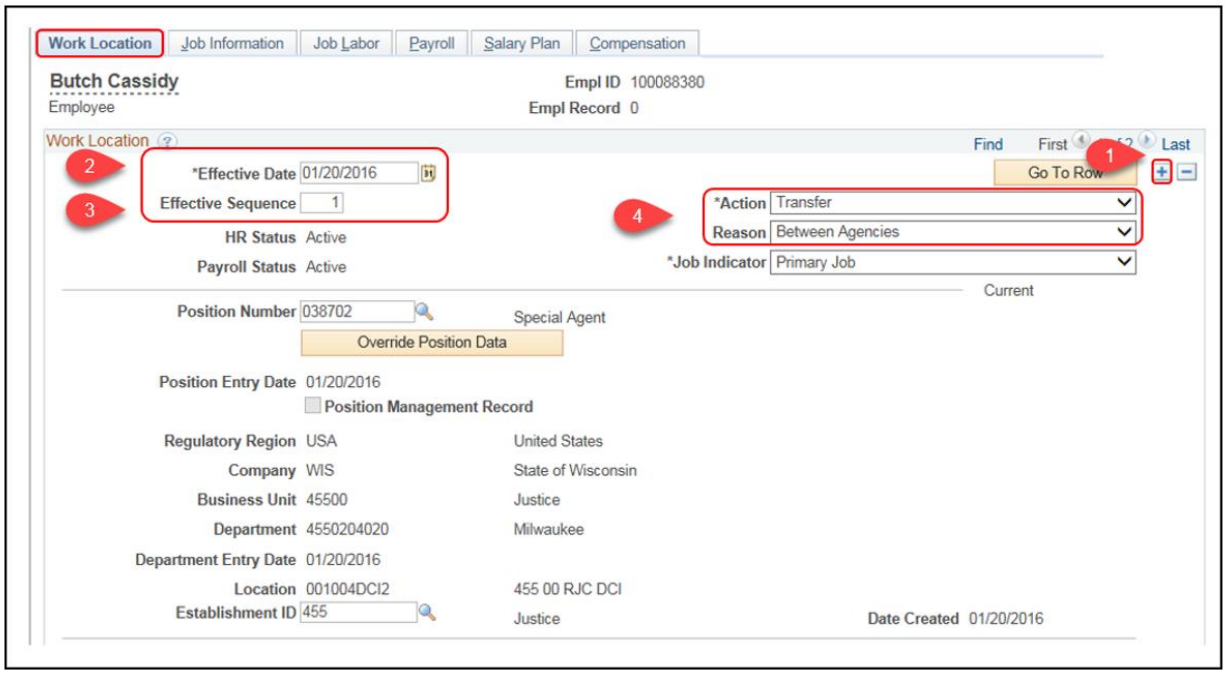
1. Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**
2. Enter the desired search criteria in the Find an Existing Value tab
3. Click **Search**



4. If multiple employees result, click the desired employee from the **Search Results** list

STEP 2: Add a row with the appropriate Action/Action Reason to the employee's Job Data record. This will be after the "People Stealer" row has been added.

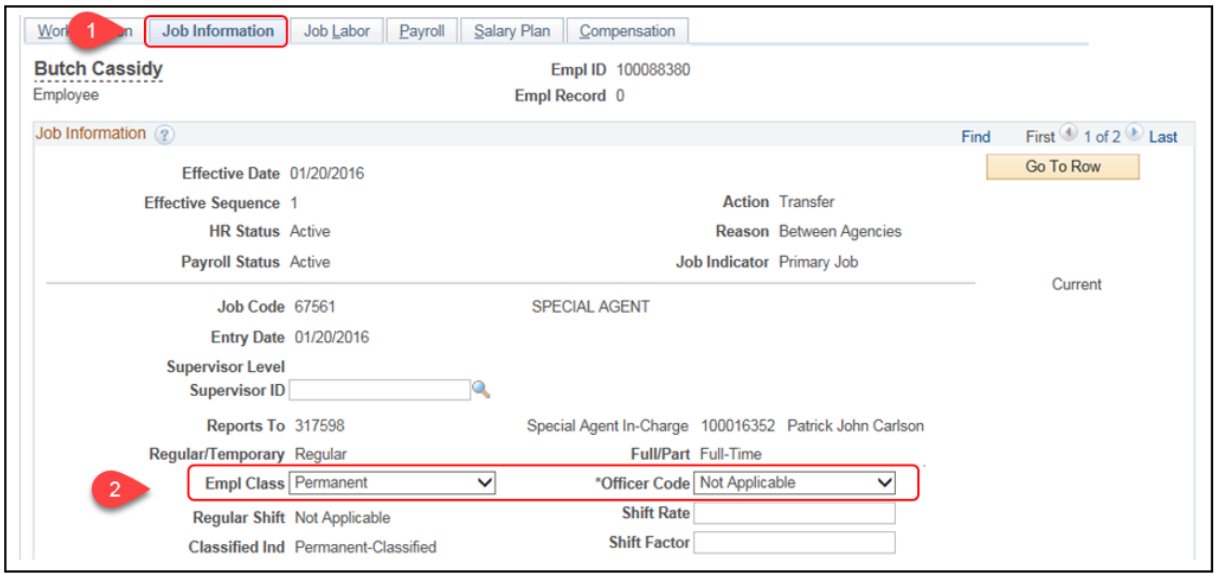
1. On the **Work Location** tab, click **Add a Row (+)**
2. Enter or select the desired ***Effective Date** of the transfer. This will be the same effective date as the "People Stealer" row.
3. ***Effective Sequence:** Enter the appropriate value. This field must be incremented up to allow multiple rows of entry on the same Effective Date. Remember the "People Stealer" entered a job data row with a sequence of 0.
4. Select Transfer, Promotion, or Demotion from the *Action list and select the appropriate reason from the ***Reason** list. See 5.2 Action/Action Reason for details.



If there are errors in any of the position data that populates, corrections need to be made on the position. Positions should be updated prior to putting an employee into them. If corrections are needed after putting an employee in a position a STAR Support Ticket is required. Do not add rows to correct job or position data.

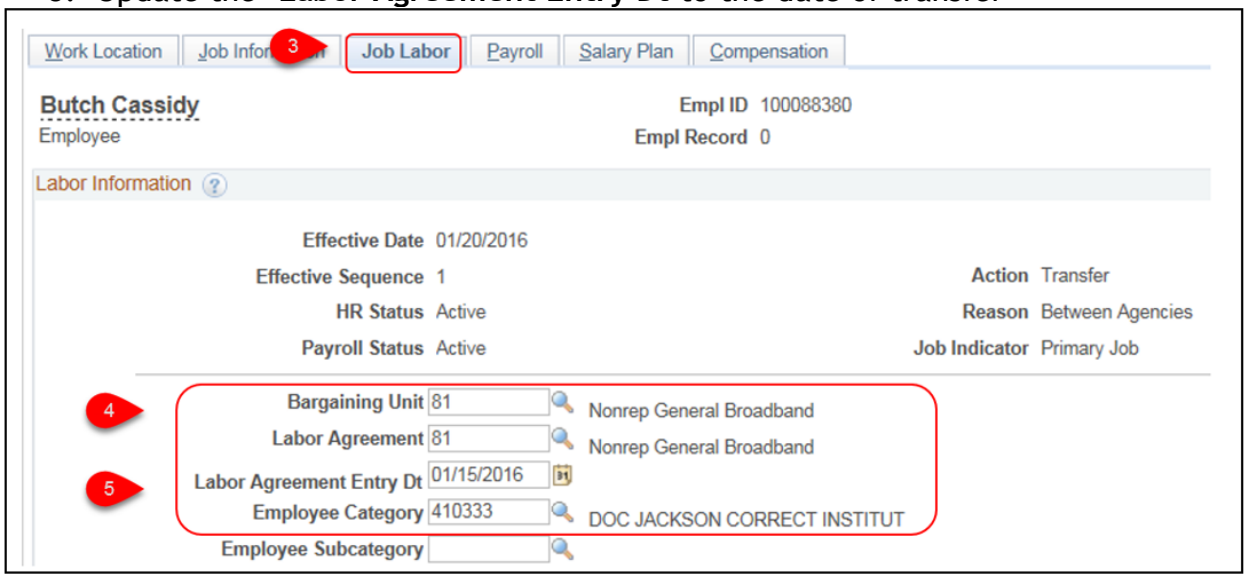
STEP 3: Update all necessary data on the employees Job Data pages to reflect the new position

1. Click the **Job Information** tab
2. Review the ***Empl Class** and ***Officer Code** and update, if necessary



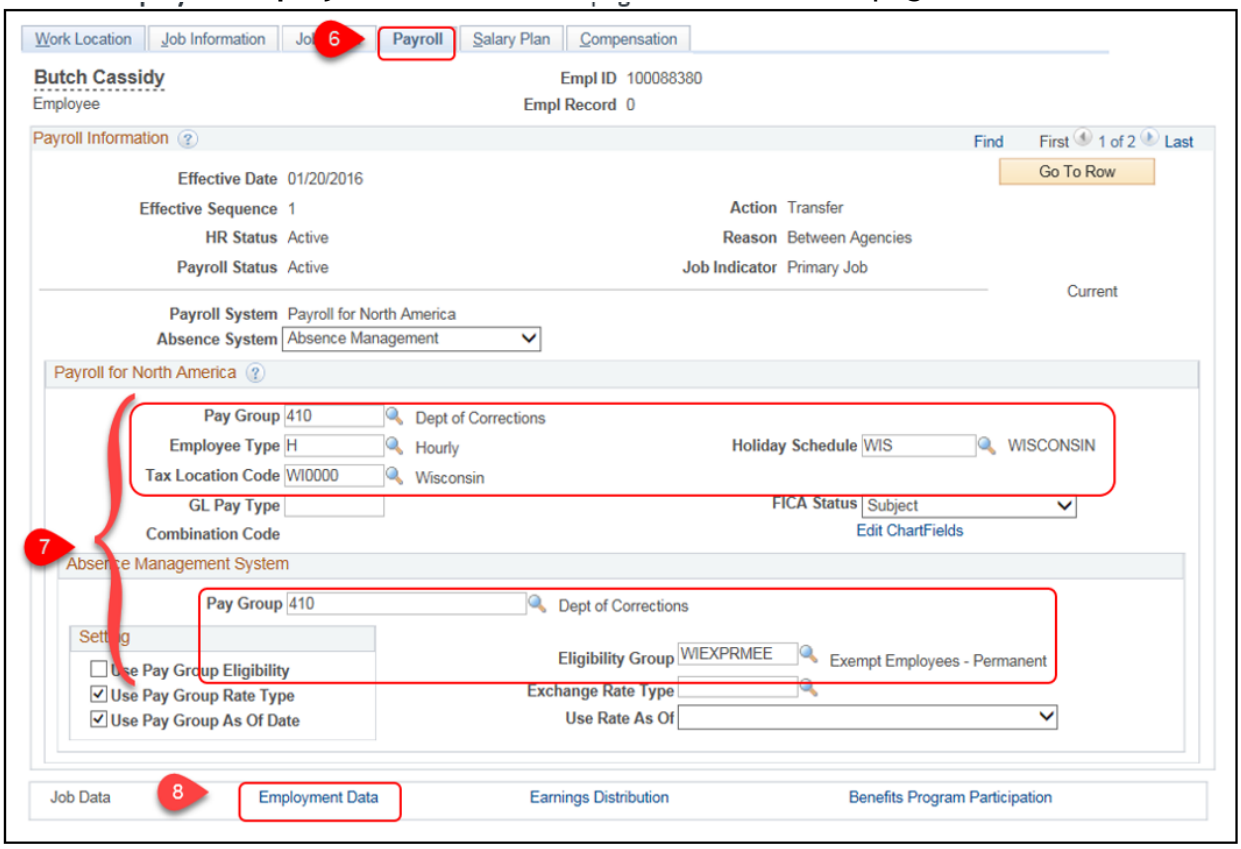
If there are errors in any of the position data that populates, corrections need to be made on the position. Positions should be updated prior to putting an employee into them. If corrections are needed after putting an employee in a position a STAR Support Ticket is required. Do not add rows to correct job or position data.

3. Click the **Job Labor** tab
4. Review the ***Bargaining Unit, *Labor Agreement, and *Employee Category** and update, if necessary
5. Update the ***Labor Agreement Entry Dt** to the date of transfer



6. Click the **Payroll** tab

7. Review the ***Pay Group, *Tax Location Code,** and Absence ***Eligibility Group** fields and update, if necessary. Remember if the FLSA status changed the Eligibility Group must match the new status.
8. Click the **Employment Data** link at the bottom of the page



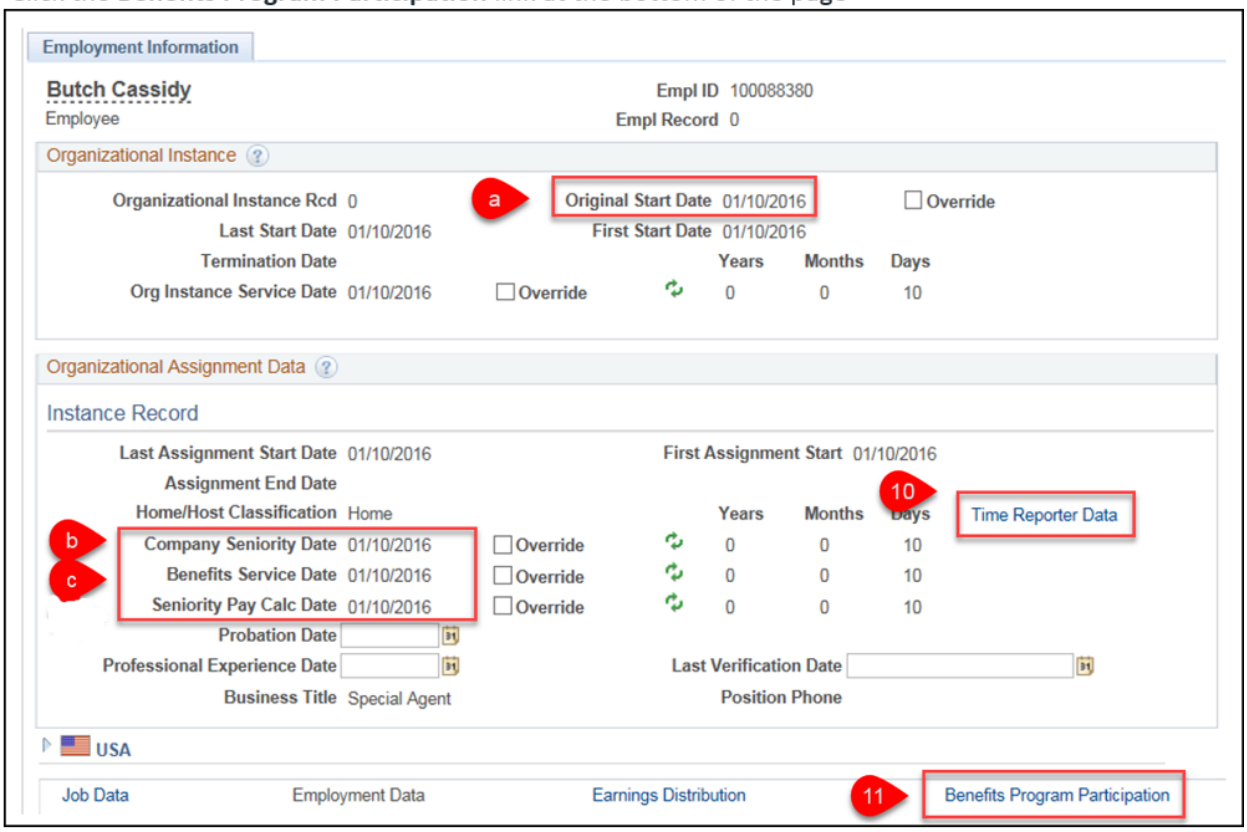
9. Review the following fields and update, if necessary, by clicking the Override checkbox to access the date fields
    a. ***Original Start Date:** Identifies the date the employee began in unclassified service, or as a permanent employee in classified service. This is State-wide service, not single Agency service.
    b. ***Company Seniority Date:** Identifies the adjusted continuous service date and drives an employee's vacation accrual rate
    c. ***Benefits Service Date:** Usually identifies the employee's WRS start date and is used to calculate eligibility for employer contribution towards health insurance. **NEVER** update this value if the employee was already covered by the WRS prior to the transfer, promotion, or demotion.



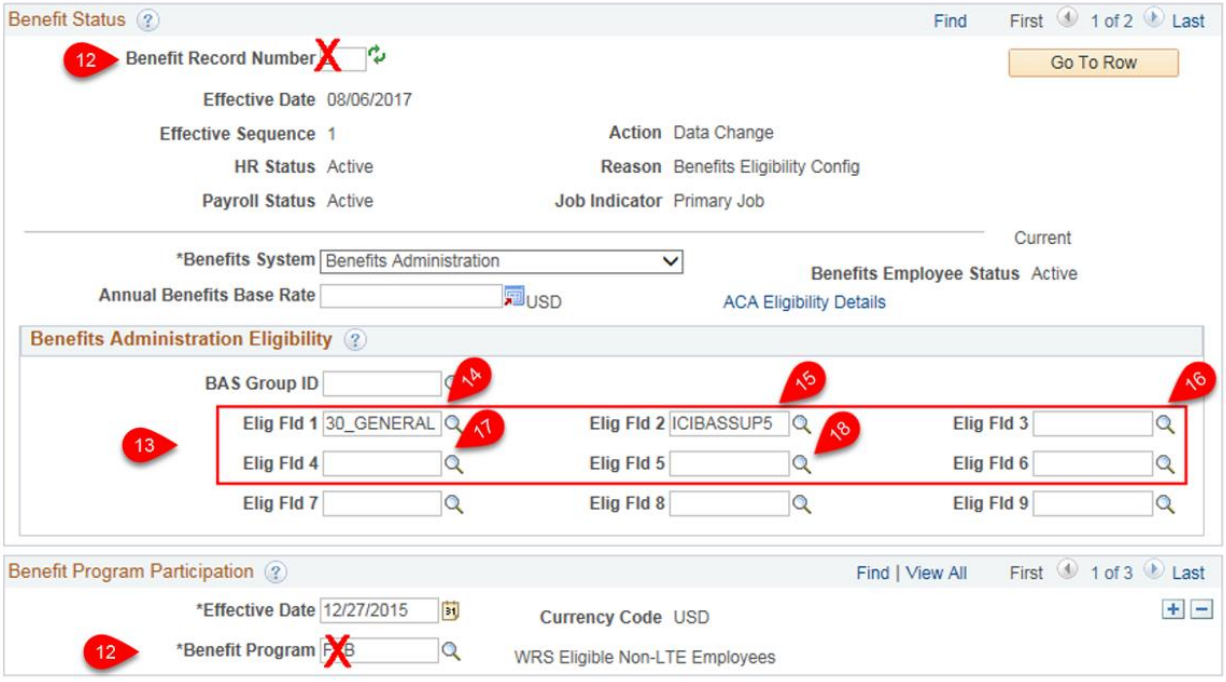
Seniority Pay Calc Date: This field is not used by the State

10. If updating the Time and Labor data as the HR Specialist, click the **Time Reporter Data** link and refer to the Time and Labor – Updating Time Reporter Data section of this job aid, then return to the following step

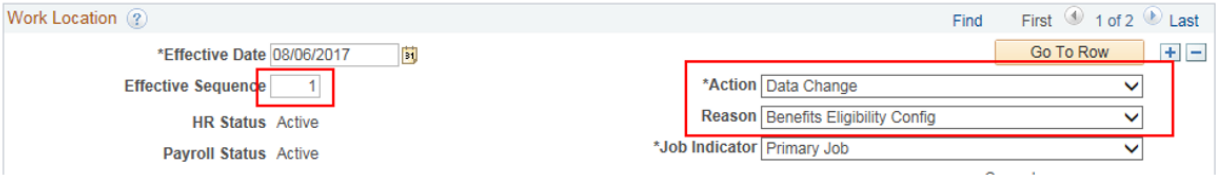
11. Click the **Benefits Program Participation** link at the bottom of the page



12. DO NOT update the benefit record or the Benefit Program
13. Review the **Elig Fld** fields. Work with your agency benefits specialist to determine if any updates are needed.



a. If no updates are needed, move on to next step
b. If updates are needed, **DO NOT update the fields on the transaction row.** You should add a sequenced row to job data with an Action = Data Change and Reason = Benefits Eligibility Config. Update Elg Fld values on the Data Change row. This will create an ELG event so if changes are needed to any benefits, this event can be used to make the updates.



Elg Fld Descriptions

14. ***Elig Fld 1**: (Required) Enter a WRS Category, or code for why the employee is NOT eligible for WRS
    a. If the WRS category is changed, the WRS Auto-Enroll process will enroll the employee in the correct WRS benefit plan
    b. If the employee is moving between non-Protective and Protective WRS categories and is enrolled in AD&D, the AD&D enrollment must be corrected. Create an SSO ticket in this situation.
15. **Elig Fld 2:** (Required field if the employee is WRS eligible) ICI category and eligibility
    a. Do not update this field upon movement unless the employee was previously not eligible for the WRS.
16. **Elig Fld 3:** There must be a value in this field for all WRS-covered LTEs indicating their eligibility for the employer contribution towards health insurance. This field is also used for employees who have pre-tax premium waiver on file.
17. **Elig Fld 4:** The value entered here tracks the first time an employee was offered ICI coverage through deferred enrollment - NEVER update this field
18. **Elig Fld 5:** The value entered here identifies grandfathered employees enrolled in 50%SGL Supplemental Plan and/or employees who have State Group Life or ICI disability premium waivers in effect
    a. This field should not be updated upon movement

Compensation Change

If the transfer, promotion, or demotion includes a pay rate change, continue to the HR – Compensation Changes section.

HR - Compensation Changes (If Applicable)

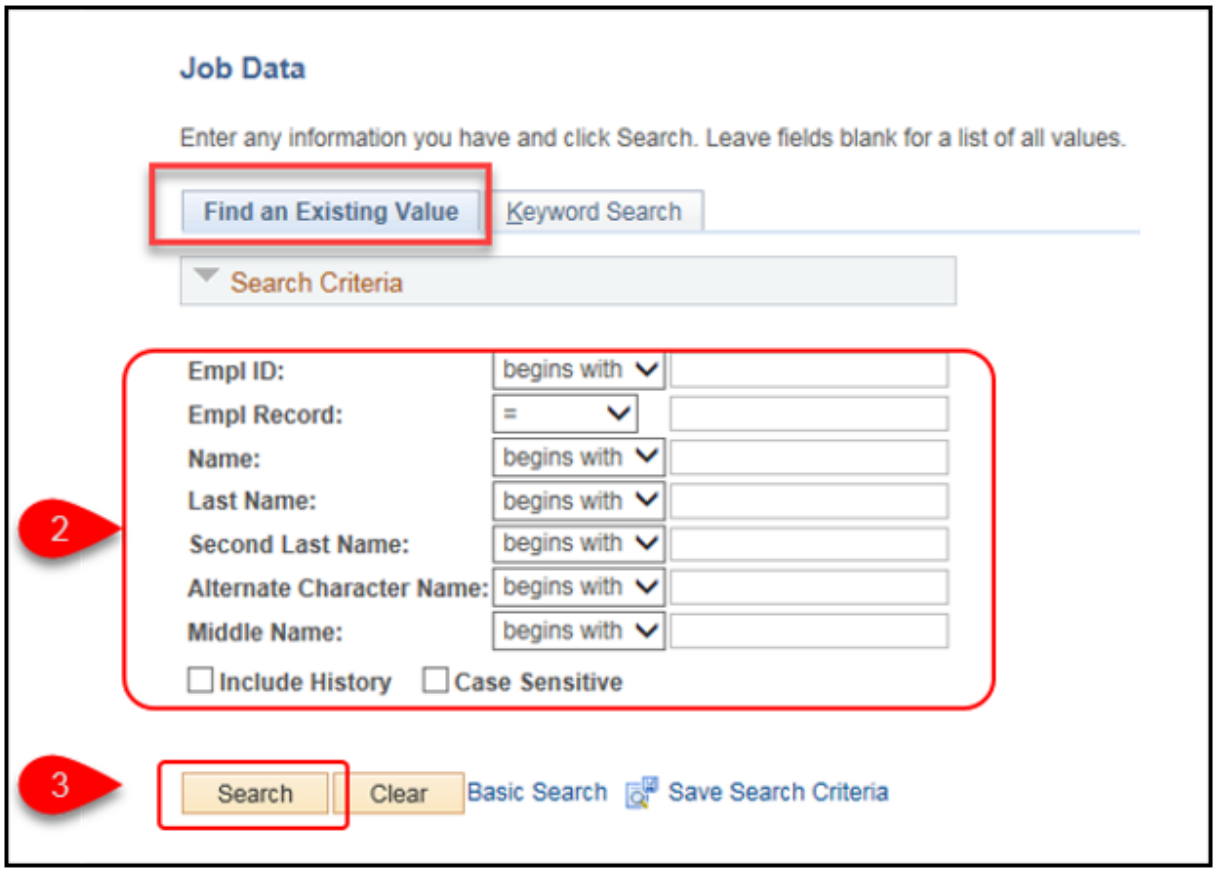
Role: Agency HR Specialist

Compensation changes must be added to an employee's job data as a separate row for tracking and reporting purposes. (The only exceptions to this are hires and rehires).

If any retroactive pay is due, PeopleSoft calculates the amount based on the Pay Rate Change row entered on the employee's Job Data. If retroactive pay crosses calendar or fiscal years, create an SSO ticket PRIOR to the first confirmed payroll with the new pay rate so any necessary adjustments can be made.

STEP 1: Navigate to the Job Data page and locate the employee

1. Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**
2. Enter the desired search criteria in the **Find an Existing Value** tab
3. Click **Search**



4. If multiple employees result, click the desired employee from the **Search Results** list

STEP 2: Add a row with the Pay Rate Change Action/Action Reason to the employee's Job Data record and update their compensation

1. On the Work Location tab, click **Add a Row (+)**
2. Enter the following:

a. *Effective Date: Select the effective date of the pay rate change. This should be the same effective date as the transfer/demotion/promotion row.

b. *Effective Sequence: Enter the appropriate value. If the pay rate change occurs on the same day as another transaction (a transfer, for example) this field must be incremented up to allow multiple rows of entry on the same Effective Date. (example – if the first effective sequence for that effective date was 0 and the pay rate change is the second row on that effective date, the sequence should be 1).

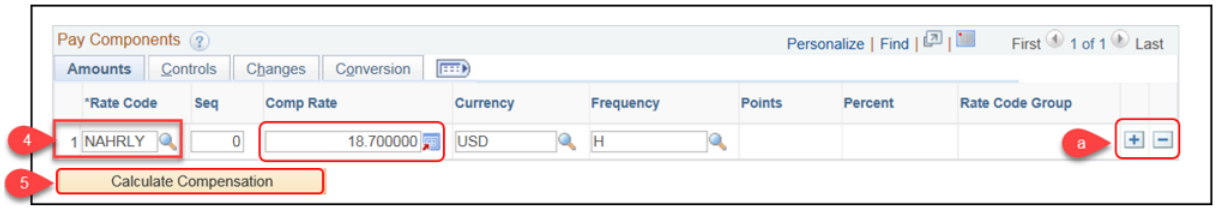
c. *Action: Select Pay Rate Change

d. *Reason: Select the appropriate value. The Action used for the personnel transaction should coordinate with the Reason used for the pay rate change. For instance:

- Correct example: Transaction 1 = Transfer (Action) / Within Agency (Reason); Transaction 2 – Pay Rate Change (Action) / Transfer (Reason)
- Incorrect example: Transaction 1 = Transfer (Action) / Within Agency (Reason); Transaction 2 – Pay Rate Change (Action) / Promotion (Reason)
- Refer to 5.2 Action/Action Reason for options



3. Click the Compensation tab.
4. Update the *Rate Code and *Comp Rate as needed.
   a. Use Add a Row (+) and Delete Row (-) in the Pay Components section to remove or add additional Pay Component rows as needed for Add-Ons.

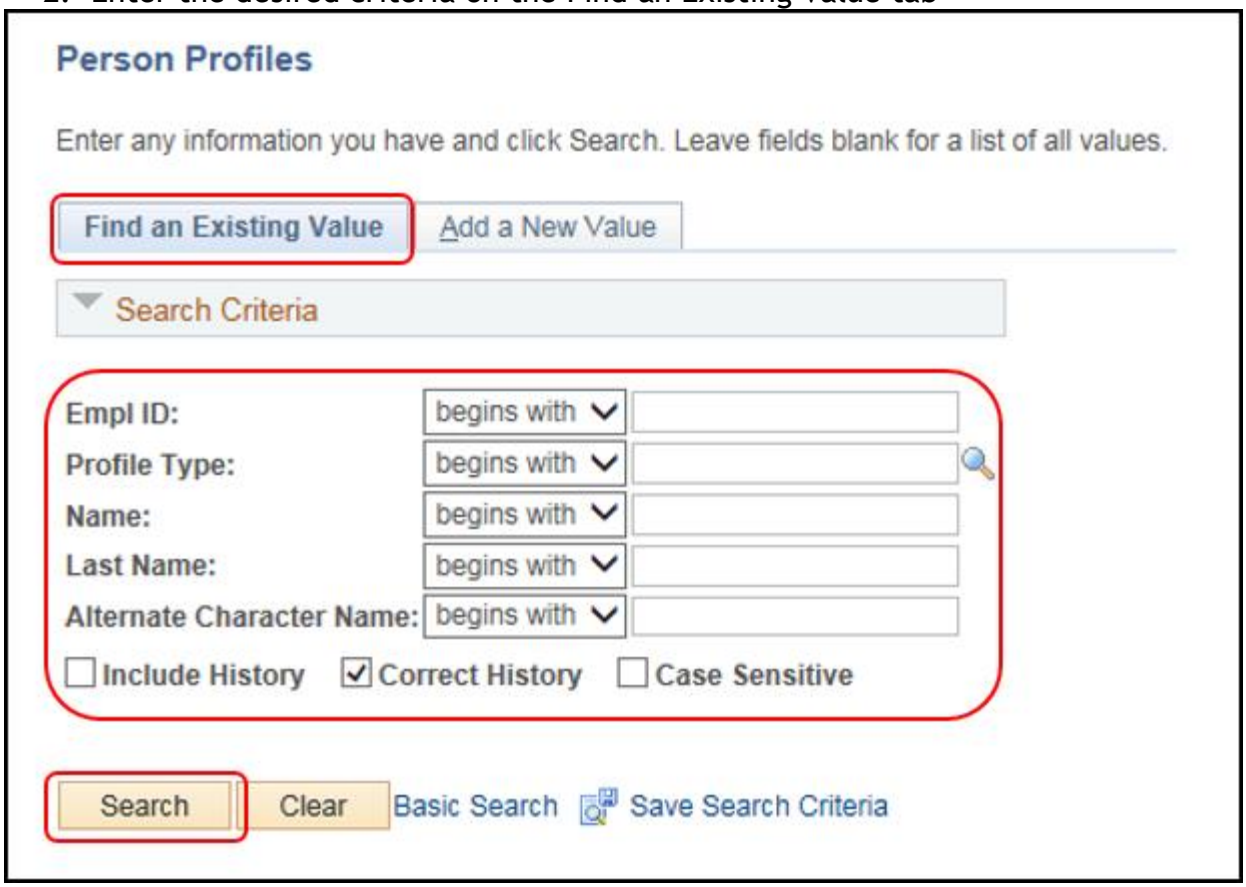


5. Click *Calculate Compensation
6. Click Save

HR - Update Personal Profile - Probation

Role: Agency HR Specialist
STEP 1: Navigate to and update the Person Profile page

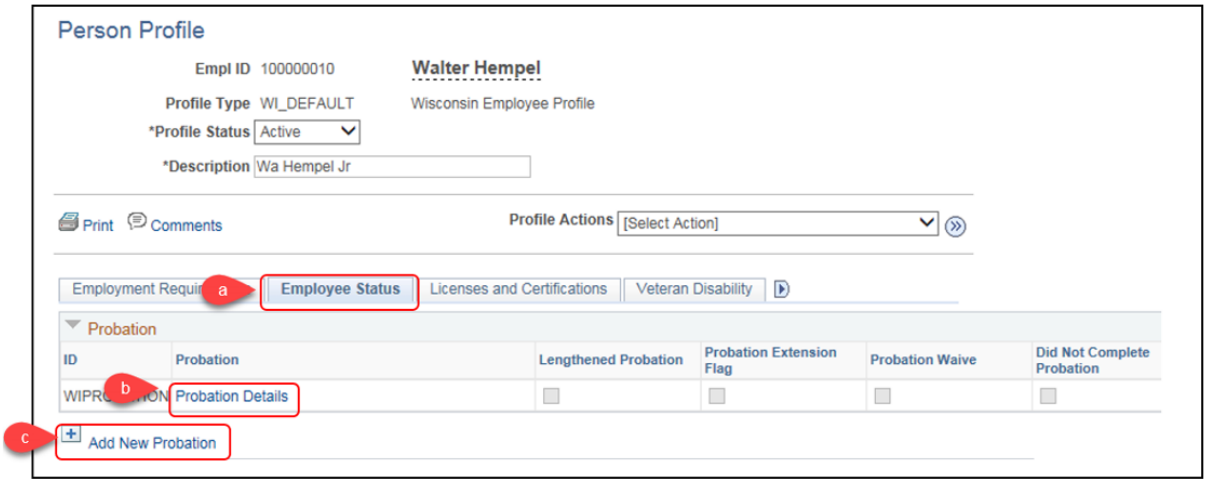
1. Navigation: **Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles**
2. Enter the desired criteria on the Find an Existing Value tab



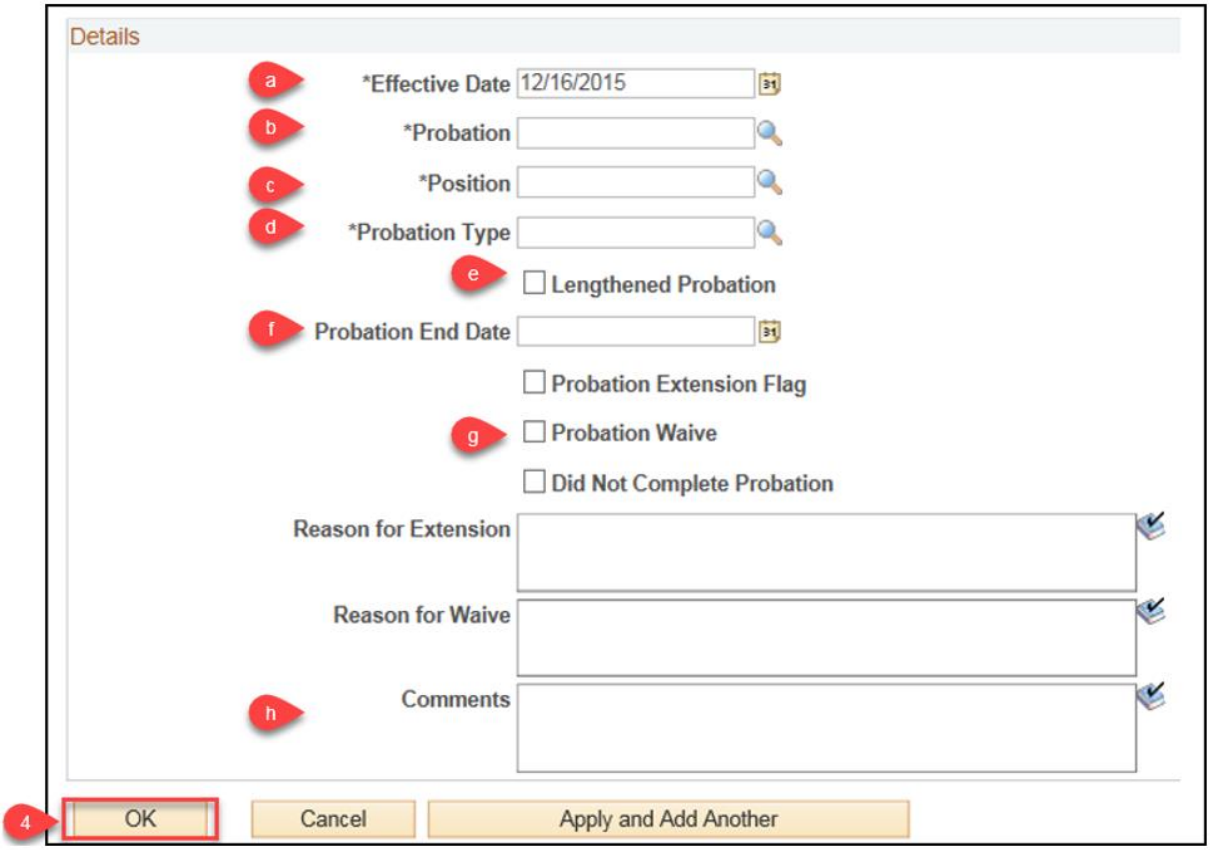
a. Click the Employee Status tab
b. Review the most recent probation details. If the transfer/promotion/demotion date is prior to the current probation end date, verify the Did Not Complete Probation checkbox is selected. If it is not, click the Probation Details link and select it. This removes the unfinished probation from reports.


Do not delete any existing probation

c. Click (+) Add New Probation to enter probation for the new transfer/promotion/demotion



3. Enter the following fields:
    a. *Effective Date: Probation start date
    b. *Probation: WIPROBATION
    c. *Position: Position number associated with the *probationary period*
    d. Some employees may have more than one employment instance, so this ties the position to the probationary period
    e. *Probation Type: Select the appropriate type of probation
    f. Lengthened Probation: Use this check box if the probationary period has been approved to be a lengthened probationary period through DPM
    g. *Probation End Date: Date of the last day of the probationary period
    h. Select Probation Waive if applicable, and enter Reason for Waive
    i. Comments: Enter comments related to the probationary period
4. Click OK



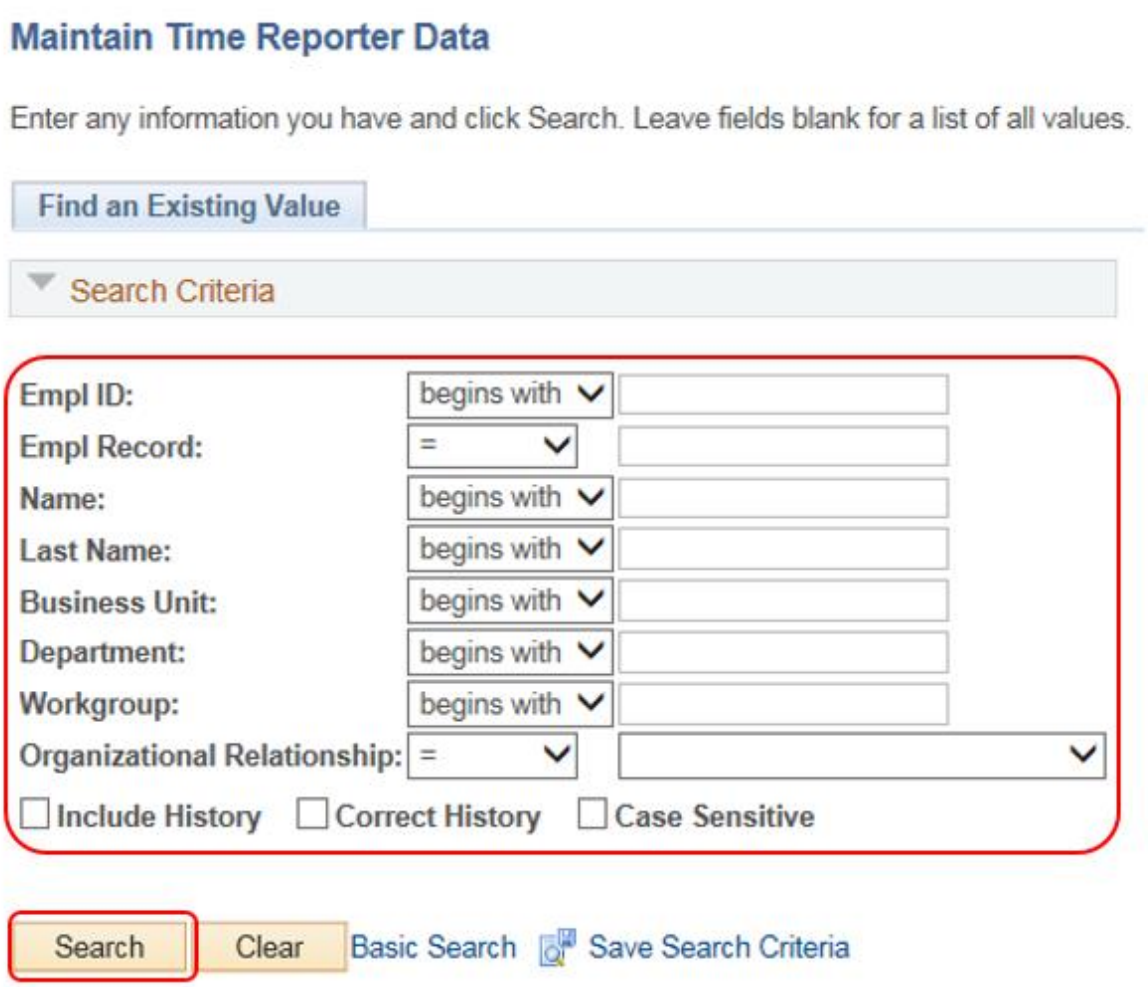
Time and Labor - Updating The Time Reporter Data

Role: Time and Labor Specialist
Alternate Role: Agency HR Specialist

Time and Labor Data can be updated by the Time and Labor Specialist role after the employee's Personal and Job Data have been updated. Or the Time and Labor Data can be updated by the HR Specialist Role during Job Data review/update via the Employment Data page. If updated by the HR Specialist, be sure to obtain the proper values from the Time and Labor Specialist.

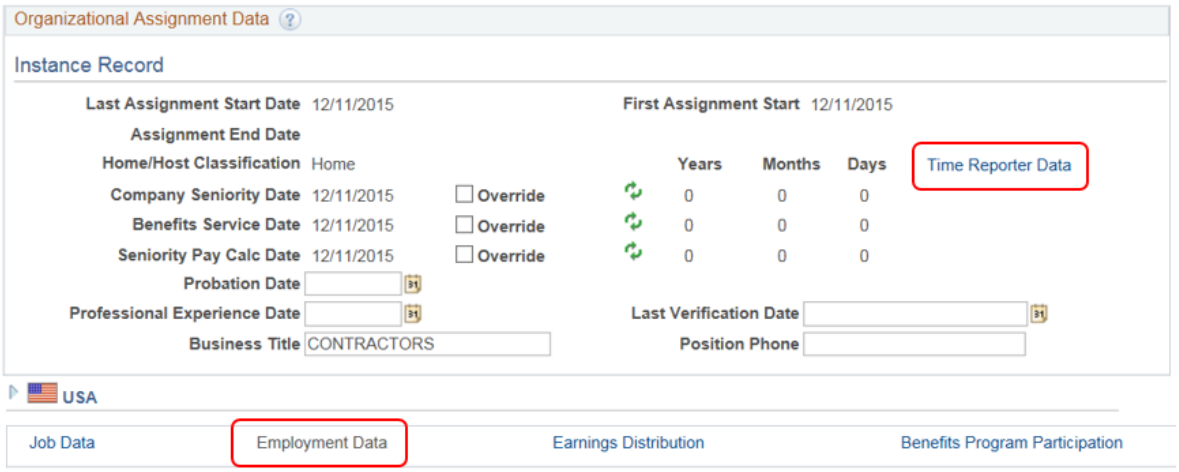
STEP 1 - Time and Labor Specialist: Navigate to the Maintain Time Reporter Data page and locate the transferred employee

1. Navigation: Main Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data
2. Enter the desired search criteria
3. Click Search



4. If multiple employees result, click the desired employee from the Search Results list

STEP 1 – If updated by the Agency HR Specialist: Click the Time Reporter Data link on the Employment Data page



STEP 2: (Both roles follow the same steps at this point) Update the Time Reporter Data

1. Click **Add a Row** (+)
2. Enter or select the ***Effective Date** for when the updated time reporter data should be active. This should fall on the first day of a pay period.
3. Update the following fields as needed: (For more information on Time Reporter Data, reference R2 Configuration Data SharePoint documents)
    a. ***Time Reporter Type**: Select either Elapsed Time Reporter or Punch Time Reporter
        - Select Elapsed Time Reporters for Exception Reporters
    b. ***Elapsed Time Template** or **Punch Time Template**: Enter whichever field is appropriate based on the **Time Reporter Type**
    c. ***Time Period ID**: Select PSDAY for Positive Time Reporters; Select WISBIWEEK for Exception Time Reporters
    d. ***Workgroup**: Identifies the default TRC program, rule program, holiday schedule, time reporting period, and other information PeopleSoft uses when processing reported time
        - For Exception Reporters, select WISEXCEPT (Approval Required) or WISEXCEPT1 (Approval Not Required)
    e. ***Taskgroup**: Identifies the default task template, task profile and time reporting templates that PeopleSoft uses when collecting and processing reported time
        - ***Rule Element 1-4:** Assign up to four rule elements as needed
        - **Rule Element 1:** Used to indicate how Overtime is compensated
            - Available Values:
                - CASH – Cash Payout for Overtime
                - COMBO – Combination of Cash and Comp Time for Overtime
                - COMP – Comp Time for Overtime
        - **Rule Element 2: D – Gives *exempt* employees and LTEs differential pay for nights AND weekends**

- **Rule Element 3**: Responsibilities pay
  - Available Values:
    - P – Permanent PM Shift Responsibility
    - T – Temporary PM Shift Responsibility
- **Rule Element 4:** Used to indicate how Holiday Premium is compensated
  - Available Values:
    - CASH – Cash Payout for Holiday Premium Hours
    - COMBO – Comp Time earned for Holiday Premium Hours

f. **TCD Group**: If the agency uses a TCD, such as a time clock or badge scanner to report time, and/or sends the reported time in to Time and Labor with an interface, select the appropriate TCD group
g. ***Send Time to Payroll**: Check
h. **For Taskgroup**: Indicates the employee's Taskgroup is defined for commitment accounting
i. **For Department:** Indicates the employee's department is defined for commitment accounting

4. Click **OK**

RESULTS: The employee's time reporter data is updated. Prior to being able to assign the employee a schedule, a batch process must run. This occurs midmorning, midafternoon, and evening.

Absence - Update Assigned Schedule

Role: Absence Specialist

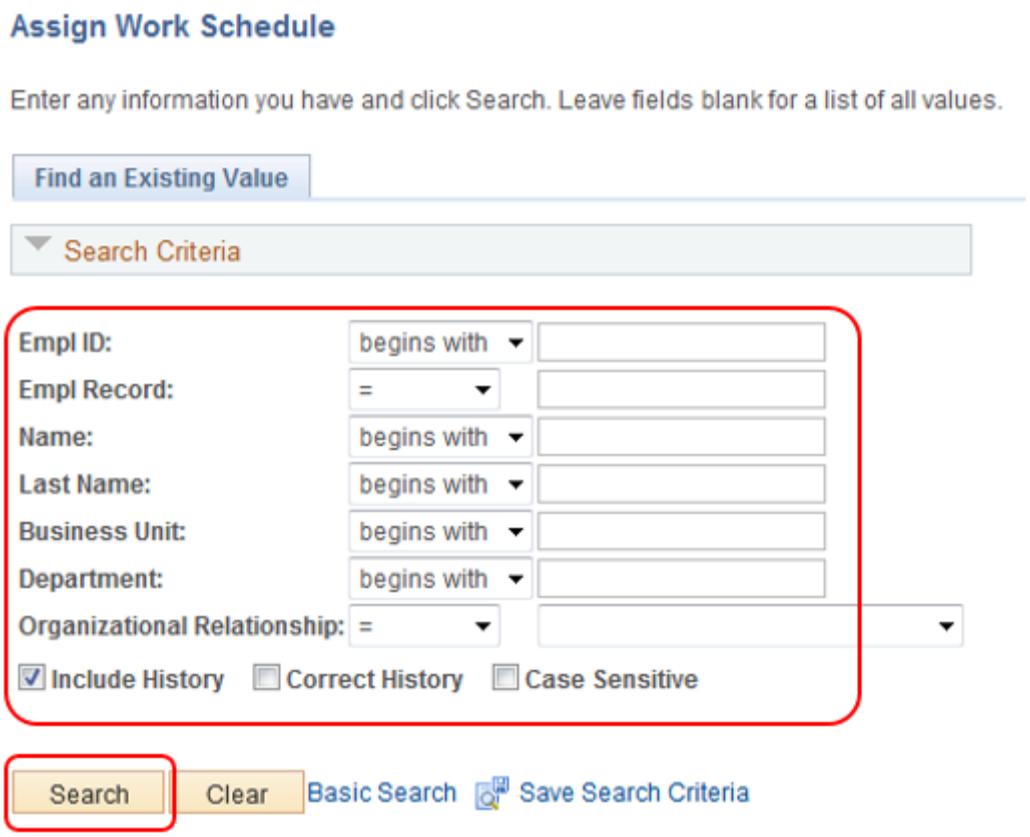
The employee should be assigned a schedule the day after Time and Labor data was updated and the nightly batch process was run. The employee will NOT be able to enter any absences until assigned a schedule.



Schedules assigned in Time and Labor are for the purpose of tracking absences only.

STEP 1: Navigate to the Assign Work Schedule page and locate the transferred employee

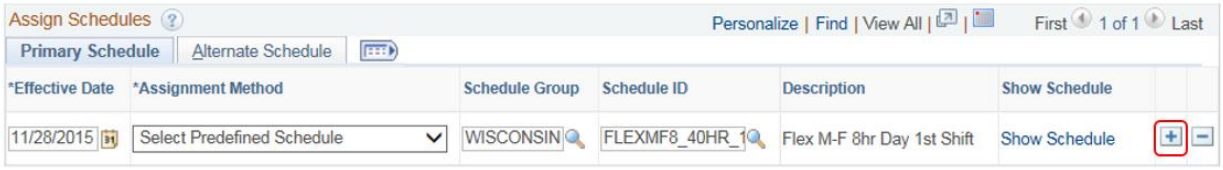
1. Navigation: Main Menu > Time and Labor > Enroll Time Reporters > Assign Work Schedule
2. Enter the desired search criteria
3. Click Search



4. If multiple employees result, click the desired employee from the **Search Results** list

STEP 2: Update schedule data

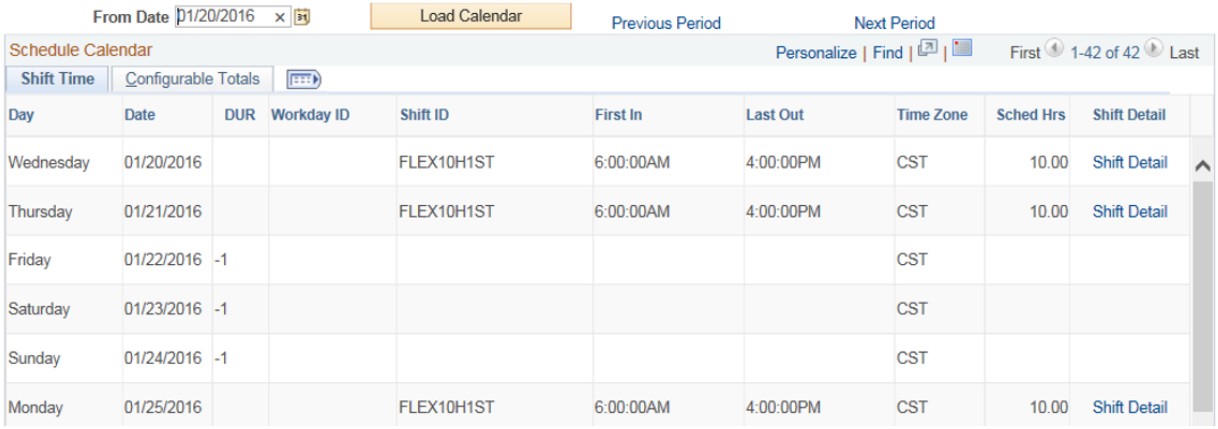
1. Click **Add a Row (+).** The previous row is copied for easy updating



2. Enter or select the ***Effective Date** of the new assigned schedule. Cannot be older than today's date
3. Update the ***Schedule Group** and ***Schedule ID** fields as needed
    - Refer to the SCHEDULES spreadsheet on STAR Connection for details. This is a download file.
4. Click ***Show Schedule** to open the Schedule Calendar window



5. Review the employee's **Sched Hrs**



6. Click **OK**
7. Click **Save**

RESULTS: The employee is now assigned a schedule for tracking absences

Benefits

Role: Agency Benefits Specialist

When any type of Transfer action is entered on an employee's job record, a Transfer (XFR) benefits event is created. This can be a transfer within an agency or a transfer between agencies.
The XFR event is automatically added to the BAS Activity Table, and when the Benefits Administration process runs over night, the event will be evaluated. No benefit eligibility should be changed on the transaction job row so the transfer event will automatically close the night of the XFR event date.



If any benefit eligibility update is needed upon movement (WRS category change, health insurance premium eligibility change… and one of the Elg Flds on the Benefits Program Participation page needs to be updated), a separate row needs to be

added to the Job Data page with an Action/Reason of Data Change/Benefits Eligibility Configuration. Once this is entered on the Job Data page, the system will create an ELG event to analyze any changes and open up benefit enrollments if applicable.

Action Description *(Code)*	Reason Description *(Code)*	Explanation	Payroll Status	HR Status	Benefit Employee Status	BAS Action
Data Change *(DTA)*	**Benefits Eligibility Configuration** *(BEC)*	Used when any data element affecting benefit eligibility needs to be updated (Employee Class, ELIG CONFIG fields, Service Date). This is also used when an employee becomes eligible for the WRS through lookback.	Active	Active	Active	ELG



Download and print these checklists if necessary by clicking on the icon. Or, review the checklists below.

Checklist: Transfer, Promotion, Demotion Within Agencies

Name: _____ Empl ID: _____

UPDATE JOB DATA

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data**

a) Enter the transfer, promotion, or demotion row

b) Review and update all fields to reflect the new position at the new agency.

- **Note:** do NOT enter compensation changes on this row. A new row specifically for the compensation change is required.
- **Note:** do NOT enter any change to the Elg Flds on the Benefits Program Participation page on this row. A separate row is needed when updating these fields (Action = Data Change, Reason = Benefits Eligibility Config).

COMPENSATION CHANGE (IF APPLICABLE)

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data (Compensation Tab)**

UPDATE PERSON PROFILE – PROBATION

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Development** > **Profile Management** > **Profiles** > **Person Profiles**

REVIEW/UPDATE TIME REPORTER DATA

Role: *Time and Labor Specialist or Agency HR Specialist*

Agency HR Specialist – Update this during Job Data entry via Time Reporter Data link on the Employment Data page.

Time and Labor Specialist – Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Manage Time Reporter Data**

REVIEW/UPDATE ASSIGNED SCHEDULE

Role: *Time and Labor Specialist*

Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Assign Work Schedule**

The assigned work schedule is only used for managing absences. This is not their actual daily work schedule.

BENEFITS

Role: *Agency Payroll Specialist*

For transfers, a XFR event is added to the BAS Activity table. This auto closes if there are no changes.

If the movement changes the employee's eligibility (e.g. WRS category change), add a separate row the Job Data page with an Action/Reason of *Data Change/Benefits Eligibility Configuration.* PeopleSoft then creates an Eligibility event to analyze any changes and open up benefit enrollments if applicable.

- All steps of the Movements between Agencies process are completed by the "receiving" Agency.
- The "sending" agency has no PeopleSoft process to complete.
- Both agencies, however, should communicate outside of PeopleSoft on the timing of the movement.
    - Prior to the movement, the employee needs to have all time for their old job entered.
- It is highly recommended that an employee's data not be transferred to the new agency prior to the Friday before the employee's start date.

Checklist: Transfer, Promotion, Demotion Between Agencies

Name: _____ Empl ID: _____

SEARCH FOR EMPLOYEE'S CURRENT JOB INFORMATION

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** > **Personal Information** > **Search for People**

Use Search Result Code: *JOB_DATA1*

Document the employee's current job information which will be used to transfer their data to your agency

Empl ID: _____ Current (old) Department: _____

Current (old) Business Unit: *(first 3 digits of Department, plus two zeros*) _____

JOB CHANGE REQUEST ("PEOPLE STEALER") – TRANSFER THE EMPLOYEE'S DATA

Role: *HR Personnel Roster*

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Request Job Change**

This step only moves the employee's data to your agency/department security. This is not the personnel transaction.

UPDATE JOB DATA

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data**

c) Enter the transfer, promotion, or demotion row

d) Review and update all fields to reflect the new position at the new agency

- **Note:** do NOT enter any compensation changes on this row. A new row specifically for the compensation change is required.
- **Note:** do NOT enter any change to the Elg Flds on the Benefits Program Participation page on this row. A separate row is needed when updating these fields (Action = Data Change, Reason = Benefits Eligibility Config).

COMPENSATION CHANGE (IF APPLICABLE)

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data (Compensation Tab)**

UPDATE PERSON PROFILE – PROBATION

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Development** > **Profile Management** > **Profiles** > **Person Profiles**

REVIEW/UPDATE TIME REPORTER DATA

Role: *Time and Labor Specialist or Agency HR Specialist*

Agency HR Specialist – Update this during Job Data entry via Time Reporter Data link on the Employment Data page

Time and Labor Specialist – Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Manage Time Reporter Data**

REVIEW/UPDATE ASSIGNED SCHEDULE

Role: *Time and Labor Specialist*

Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Assign Work Schedule**

The assigned work schedule is only used for managing absences. This is not their actual daily work schedule.

BENEFITS

Role: *Agency Payroll Specialist*

For transfers, a XFR event is added to the BAS Activity table. This auto closes if there are no changes.

If the movement changes the employee's eligibility (e.g. WRS category change), add a separate row the Job Data page with an Action/Reason of *Data Change/Benefits Eligibility Configuration.* PeopleSoft then creates an Eligibility event to analyze any changes and open up benefit enrollments if applicable.

Resources

- State of Wisconsin Compensation Plan
- Promotion: Ch. ER-MRS 14, Wis. Adm. Code
- Transfer: Ch. ER-MRS 15, Wis. Adm. Code
- Demotion: Ch. ER-MRS 17, Wis. Adm. Code
- Reinstatement and Restoration – s. 230.31, Wis. Stats.; s. 230.32, Wis. Stats.; s. 230.33, Wis. Stats.; & Ch. ER-MRS 16, Wis. Adm. Code; s. 230.33, Wis. Stats. Restoration Bulletin
- Probation: s. 230.28, Wis. Stats. & Ch. ER-MRS 13, Wis. Adm. Code
- Alphabetical Listing of Classifications

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.2.2 Termination /Rehire Within 30 Days

Under Construction



Resources

- Reinstatement and Restoration – s. 230.31, Wis. Stats.; s. 230.32, Wis. Stats.; s. 230.33, Wis. Stats.; & Ch. ER-MRS 16, Wis. Adm. Code; s. 230.33, Wis. Stats. Restoration Bulletin
- Calculating Company Seniority Date: s. ER 18.02(2), Wis. Adm. Code; Calculation Worksheet

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.3 Leave of Absence

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

2.3.1 Leave of Absence

Under Construction



Resources

Leave of absence – s. 230.35(2), Wis. Stats.; s. ER 18.14, Wis. Adm. Code; WHRH 740

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.3.2 FMLA (Family Medical Leave Act)

Under Construction



Resources

- Department of Labor FMLA: https://www.dol.gov/whd/fmla/
- Wisconsin FMLA: s. 103.10, Wis. Stats. WHRH 724

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
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2.3.3 Entering an Unpaid Leave of Absence To Fill an Unclassified or Project Position

Position – Create Surplus Position (Optional)
HR – Update Job Data for the Unpaid Leave of Absence
HR – Add an Employment Instance for the Unclassified or Project Position
HR – Update Biographical Data
Time and Labor – Update Time Reporter Data
    Inactivate Time and Labor on the Initial Employment Instance
    Set Up Time and Labor Data on the Unclassified or Project Employment Instance
Time and Labor – Assign a Schedule
Absences - Transferring Absence Balances
Benefits___Unclassified_Project_Position_Is_In_STAR
Benefits___Unclassified_Project_Position_Is_External_To_STAR
Benefits - One Scenario (Within STAR)
Benefits - Second Scenario (External)
Checklist: Entering Unpaid Leave of Absence to Fill an Unclassified or Project Position
Resources

Position – Create Surplus Position (Optional)

Role: Agency Position Management Specialist
Agencies often use surplus positions for employees who are out on a *leave of absence* because they want to backfill the vacancy. For details on creating positions, refer to the Creating and Updating Position Data Job Aid.

HR – Update Job Data for the Unpaid Leave of Absence

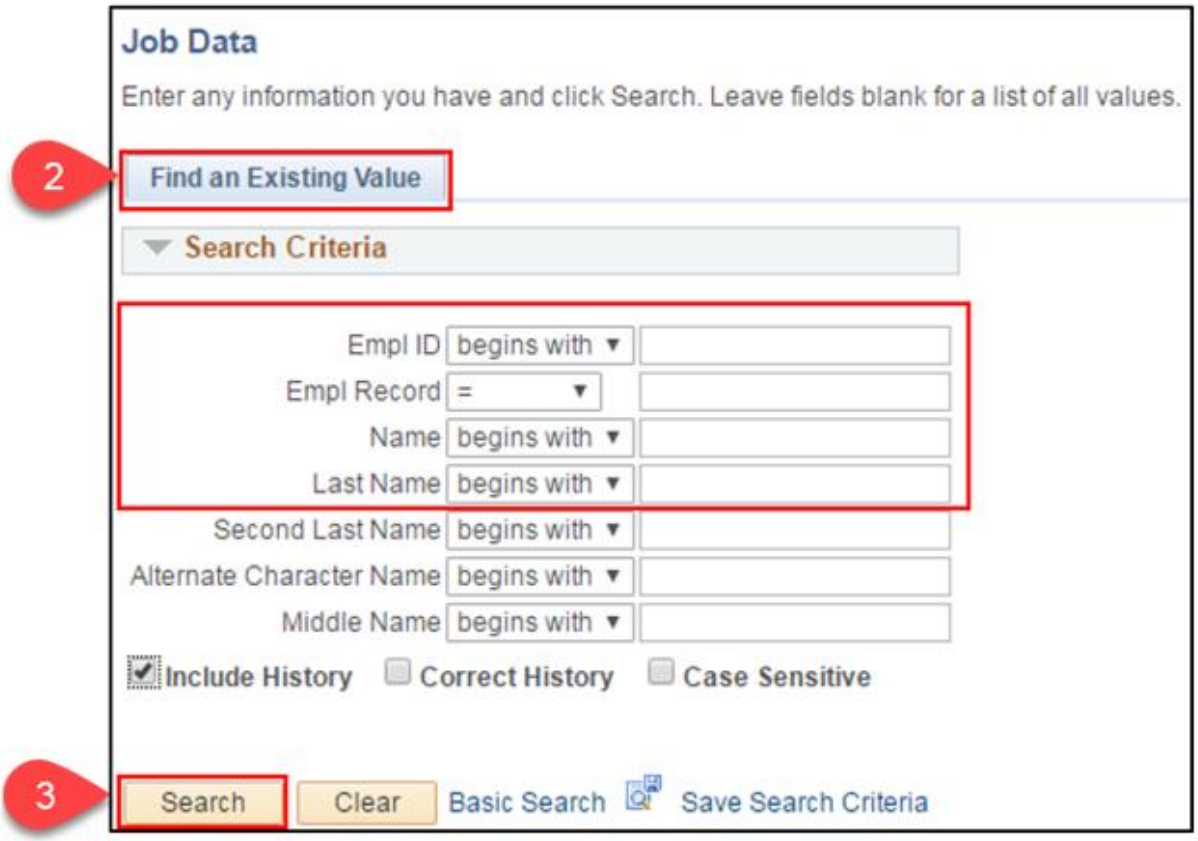
Role: Agency HR Specialist

2.3.3 Entering an Unpaid Leave of Absence To Fill an Unclassified or Project Position

Employees must be on a formal leave of absence to retain their classified position while filling an unclassified or project position. See Wisconsin Human Resources Handbook chapter 740 for additional information.

STEP 1: Navigate to the Job Data page and find the employee going on an unpaid leave of absence.

1. Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**
2. Enter the desired search criteria in the Find an Existing Value tab.
3. Click Search.



4. If multiple employees result, click the desired employee from the search results.

STEP 2: Add a row with the unpaid leave of absence Action/Action Reason to the employee's Job Data record.

1. On the Work Location tab, click Add a Row (+).
2. Enter or select the desired Effective Date for the start of the unpaid leave of absence.

It is most typical that the effective date is the Sunday of the new pay period.

3. Select the Action of Unpaid Leave of Absence
4. Select the appropriate Reason
5. Select Secondary Job as the Job Indicator

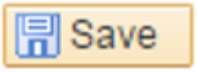
A warning may produce. You will be adding a primary job next, so there is no need to be concerned with the warning.

6. Enter the surplus position number in the Position Number field, if applicable.



Action Description *(Code)*	Reason Description *(Code)*	Explanation	Payroll Status	HR Status	Benefit Employee Status
Unpaid Leave of Absence *(LOA)*	**Filling Unclassified Position** *(FUP)*	Used when an employee is on a leave of absence to fill an unclassified position. They will not be paid for their classified position while on leave. *Note: A new employment instance will need to be added for the unclassified appointment if the position is in PeopleSoft.*	Leave of Absence	Active	Leave with Benefits
Unpaid Leave of Absence *(LOA)*	**Filling a Project Position** *(FPP)*	Used when an employee is on a leave of absence to fill a project position. They will not be paid for their permanent position while on leave. *Note: A new employment instance will need to be added for the project appointment.*	Leave of Absence	Active	Leave with Benefits

7. Click Save



RESULT: The employee's Job Data is updated and when Benefits Administration runs overnight, an LOA benefits event opens.

- If the unclassified/project position is external to STAR, all insurances will need to be waived by the benefit administrator on the LOA event that is created. This can be done through the perform election entry (Main Menu>Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry). Benefits will be waived effective the 1st of the month on or following the date of the leave of absence. The employee will be eligible for insurances in their new position.

- If the unclassified/project position is within STAR, the benefit administrator will need to finalize the LOA event without making any elections within the event. This can be done through the perform election entry (Main Menu>Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry).

HR – Add an Employment Instance for the Unclassified or Project Position

Role: Agency HR Specialist



If the unclassified position (additional employment instance) is at a different agency, this process is performed by the agency where the employee holds the unclassified or project position.

Create a new employment instance for the employee's unclassified/project position. This instance is assigned a new empl record number which is used to track transactions and records associated with the unclassified/project position.

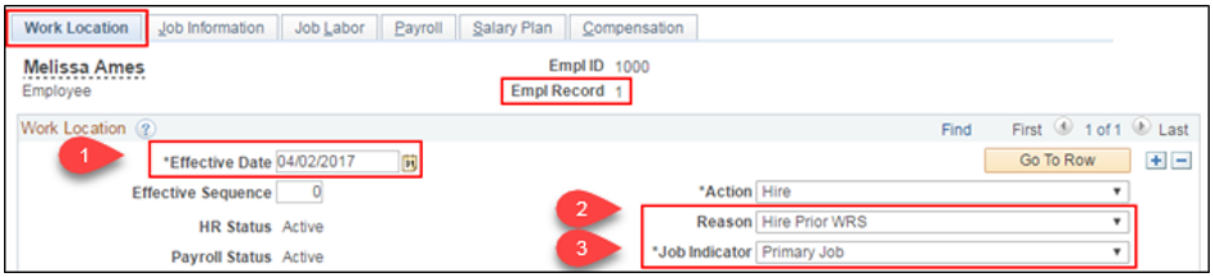
STEP 1: Navigate to the Employment Instance page and find the employee.

1. Navigation: Main Menu > Workforce Administration >Job Information > Add Employment Instance
2. Enter or select the desired Empl ID.
    - Notice the Empl Record for this employment instance has been incremented
3. Click Add Relationship.



STEP 2: Enter job data associated with the employee's unclassified/project position

1. Enter or select the desired Effective Date for the start of the unclassified/project position.
2. Select the appropriate Reason from the list.
3. Update Job Indicator to Primary Job.

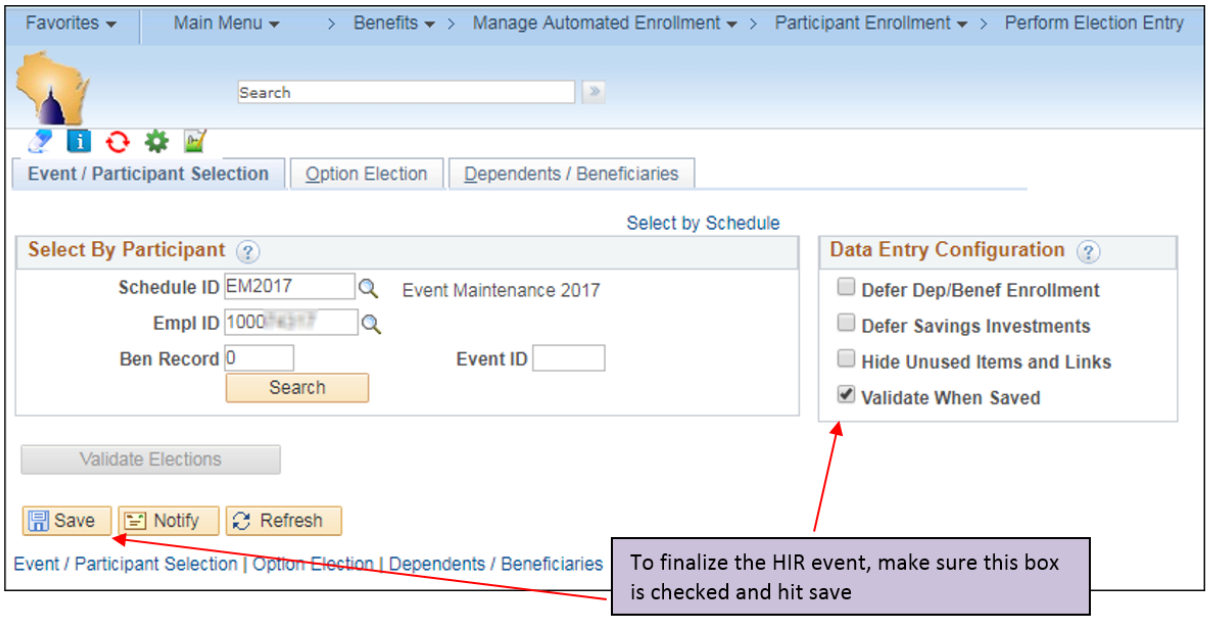


STEP 3: Complete all required Job Data pages fields.

- Continue entering complete job data for the unclassified/project position as a hire. For complete details on the process, refer to HR – Enter Job Data section of the Entering a New Hire Job Aid.

Considerations:

- All service dates MUST match on the two employment records.
- Review elig fld 1; often times the employee is now going to be a new WRS category
- Ensure elig fld 2 for both records match
- Do NOT change the benefit rcd number or the benefit program
- When you enter the hire, this will create a HIR event which will open to the employee in eBenefits. Teh agency will need t finalize the HIR event.



HR - Update Biographical Data

Role: Agency HR Specialist

If the unclassified position (additional employment instance) is at a different agency, this process is performed by the agency where the employee holds the unclassified or project position.

Oftentimes when an employee is filling an unclassified or project position, their work-related contact information needs to be updated.

Biographical data can be updated at the following navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person**

Time and Labor - Update Time Reporter Data

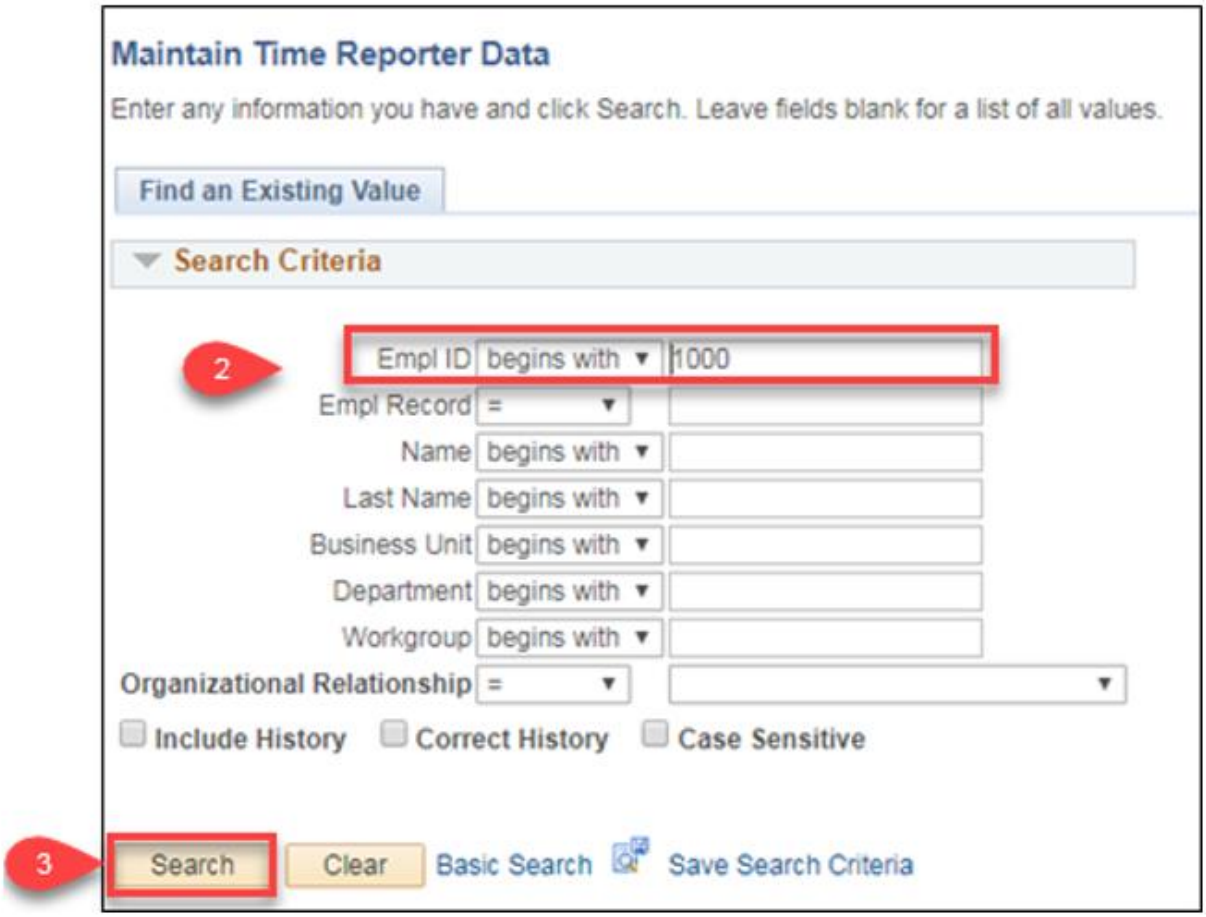
Role: Agency Time and Labor Specialist

Inactivate Time and Labor on the Initial Employment Instance

STEP 1: Navigate to the Maintain Time Reporter Data page and locate the employee.

1. Navigation: Main Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data
2. Enter the desired Empl ID.

3. Click Search.

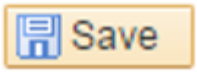


STEP 2: Inactivate the Time Reporter Data.

1. Click Add a Row (+)
2. Enter or select the Effective Date when the Time and Labor will be inactive.
3. Select Inactive from the Status list



4. Click Save



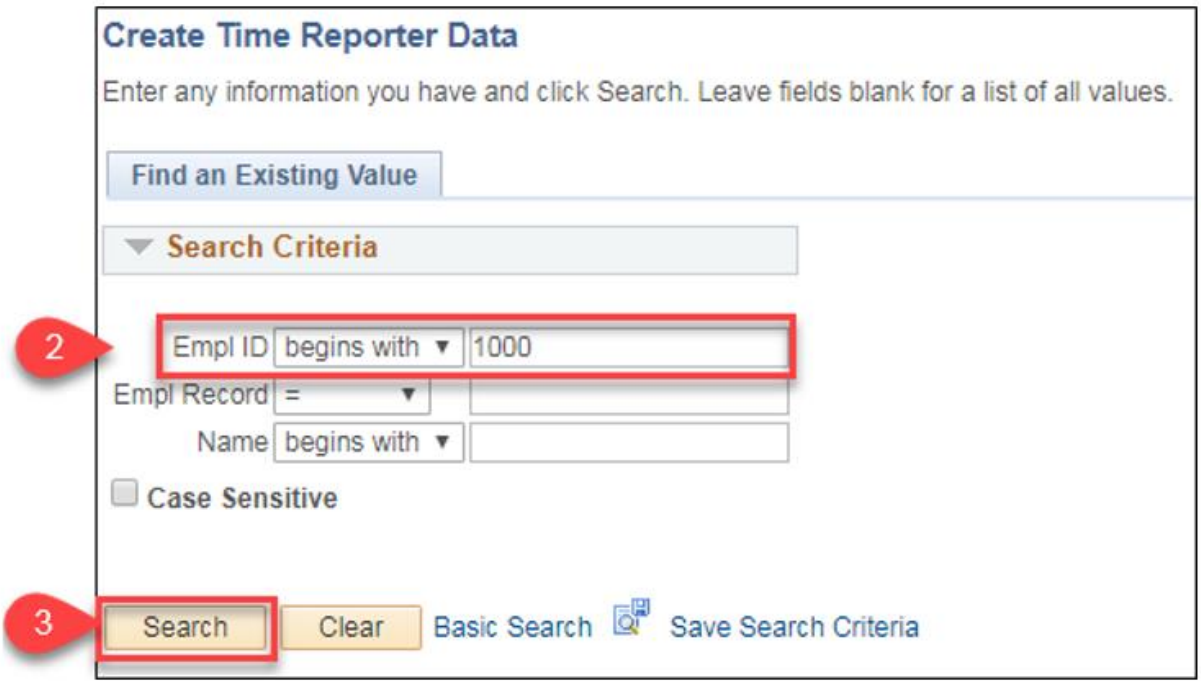
Set Up Time and Labor Data on the Unclassified or Project Employment Instance

2.3.3 Entering an Unpaid Leave of Absence To Fill an Unclassified or Project Position

If the unclassified position (additional employment instance) is at a different agency, this process is performed by the agency where the employee holds the unclassified or project position.

STEP 1: Navigate to the Create Time Reporter Data page and locate the employee.

1. Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Create Time Reporter Data**
2. Enter the desired Empl ID.
3. Click Search.

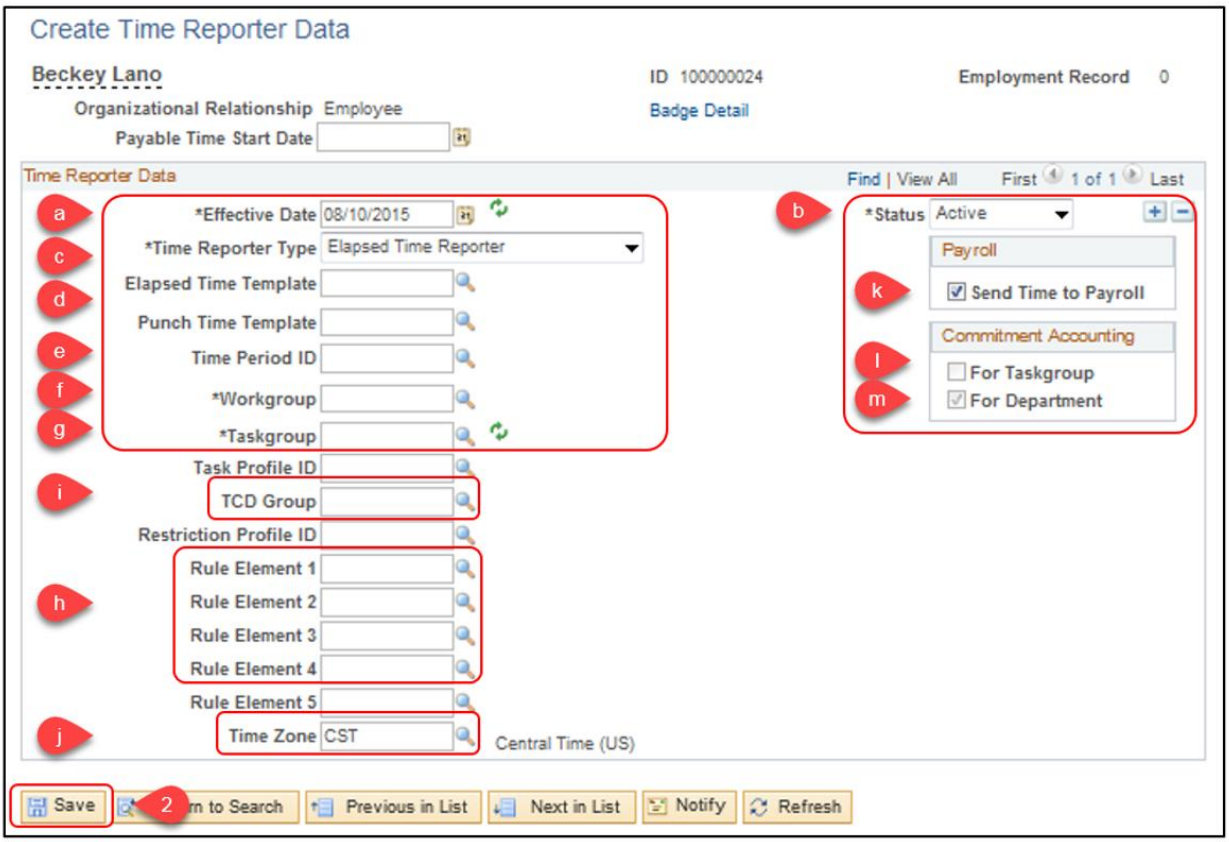


STEP 2: Enter the Time Reporter Data.

1. Enter the following fields:
    a. Effective Date: The date the time reporter data for the unclassified position is effective. This should be the hire date.
    b. Status: When an employee is enrolled, the time reporting status is Active by default
    c. Time Reporter Type: Select either Elapsed Time Reporter or Punch Time Reporter
        i. Select Elapsed Time Reporters for Exception Reporters
    d. Elapsed Time Template or Punch Time Template: Enter whichever field is appropriate based on the Time Reporter Type.
    e. Time Period ID: Select PSDAY for Positive Time Reporters; Select WISBIWEEK for Exception Time Reporters.

f. Workgroup: Identifies the default TRC program, rule program, holiday schedule, time reporting period, and other information PeopleSoft uses when processing reported time.
    i. For Exception Reporters, select WISEXCEPT (Approval Required) or WISEXCEPT1 (Approval Not Required)
g. Taskgroup: Identifies the default task template, task profile and time reporting templates that PeopleSoft uses when collecting and processing reported time
h. Rule Element 1-4: Assign up to four rule elements as needed
    i. Rule Element 1: Used to indicate how Overtime is compensated
        - Available Values:
            - CASH – Cash Payout for Overtime
            - COMBO – Combination of Cash and Comp Time for Overtime
            - COMP – Comp Time for Overtime
    ii. Rule Element 2: D – Gives *exempt* employees and LTEs differential pay
    iii. Rule Element 3: Responsibilities pay
        - Available Values:
            - P – Permanent PM Shift Responsibility
            - T – Temporary PM Shift Responsibility
    ii. Rule Element 4: Used to indicate how Holiday Overtime is compensated
        - Available Values:
            - CASH – Cash Payout for Holiday Overtime
            - COMBO – Combination of Cash and Comp Time for Holiday Overtime
            - COMP – Comp Time for Holiday Overtime
b. TCD Group: If the employee uses a TCD, such as a time clock or badge scanner to report time, select the appropriate TCD group
c. Time Zone: CST
d. Send Time to Payroll: Check
e. For Taskgroup: Indicates the employee's Taskgroup is defined for commitment accounting
f. For Department: Indicates the employee's department is defined for commitment accounting

2. Click Save.



RESULT: The employee is now enrolled as a time reporter for their unclassified position and is immediately effective. An overnight batch runs prior to the employee being assigned a schedule.

Time and Labor - Assign a Schedule

Role: Time and Labor Specialist

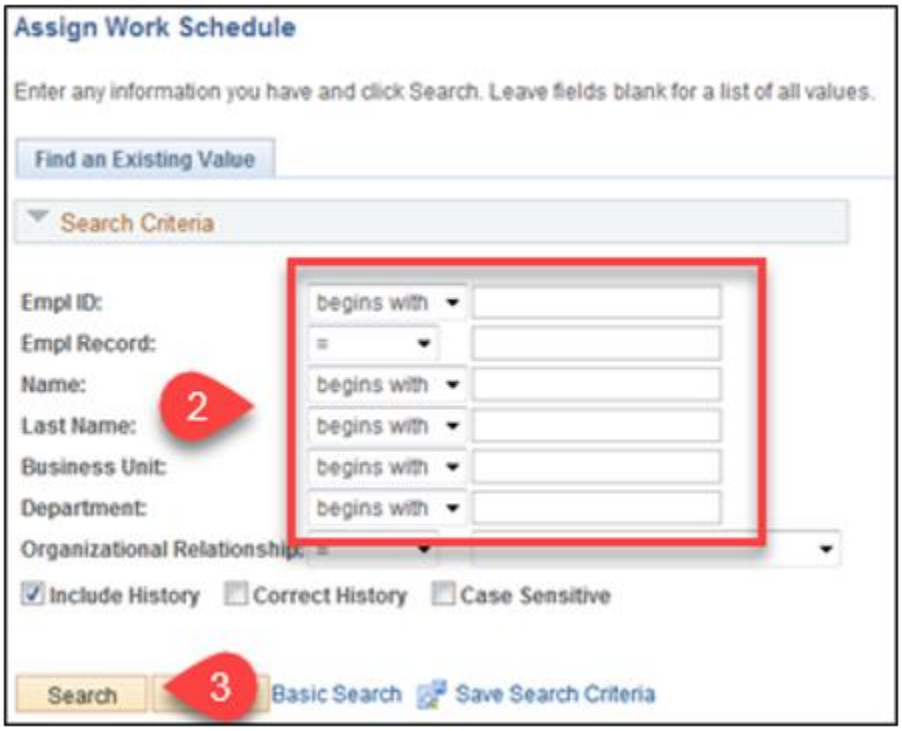
The employee should be assigned a schedule the day after Time and Labor data was entered and the nightly batch process was run. The employee will NOT be able to enter any absences until assigned a schedule.

Schedules assigned in Time and Labor are for the purpose of tracking absences only.

STEP 1: Navigate to the Assign Work Schedule page and locate the desired new hire/rehire employee.

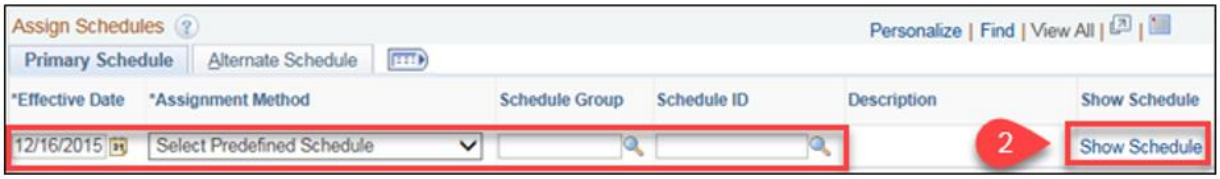
1. Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Assign Work Schedule**
2. Enter the desired search criteria.

3. Click Search.
4. If multiple employees result, click the desired employee from the Search Results list.

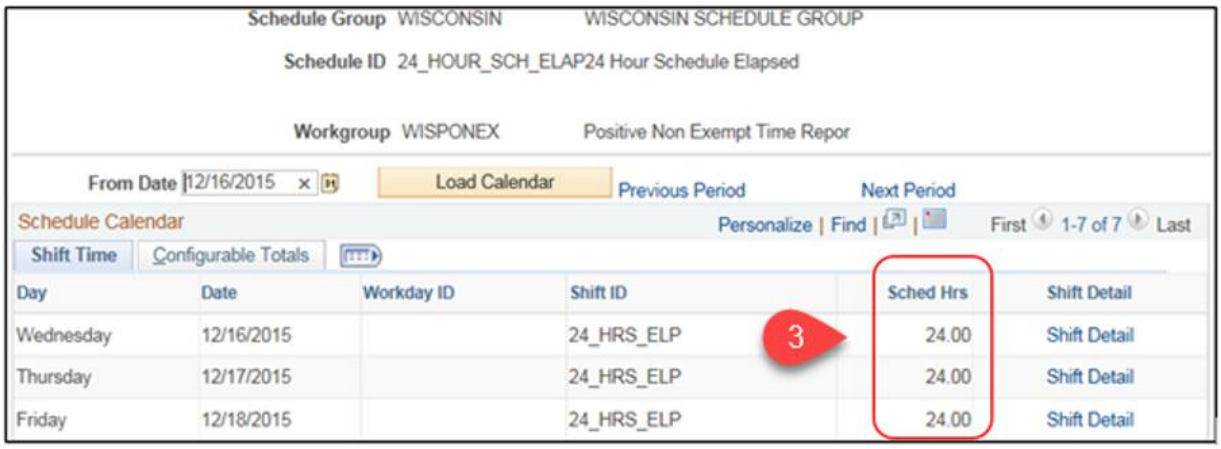


STEP 2: Enter schedule data.

1. Enter the following fields:
    1. Effective Date: The effective date of the assigned schedule. Cannot be older than today's date. For a new hire/rehire, the effective date MUST be the date of hire.
    2. Assignment Method: Select Predefined Schedule
        i. After Select Predefined Schedule is selected, the Schedule Group and Schedule ID fields activate
        ii. Refer to the SCHEDULES spreadsheet on Star Connection for details.
    3. Schedule Group. Select the appropriate value
    4. Schedule ID: Select the appropriate value
2. Click Show Schedule to open the Schedule Calendar window.



3. Review the employee's Sched Hrs.



4. Click OK.
5. Click Save.

RESULT: The employee is now assigned a schedule for tracking absences.

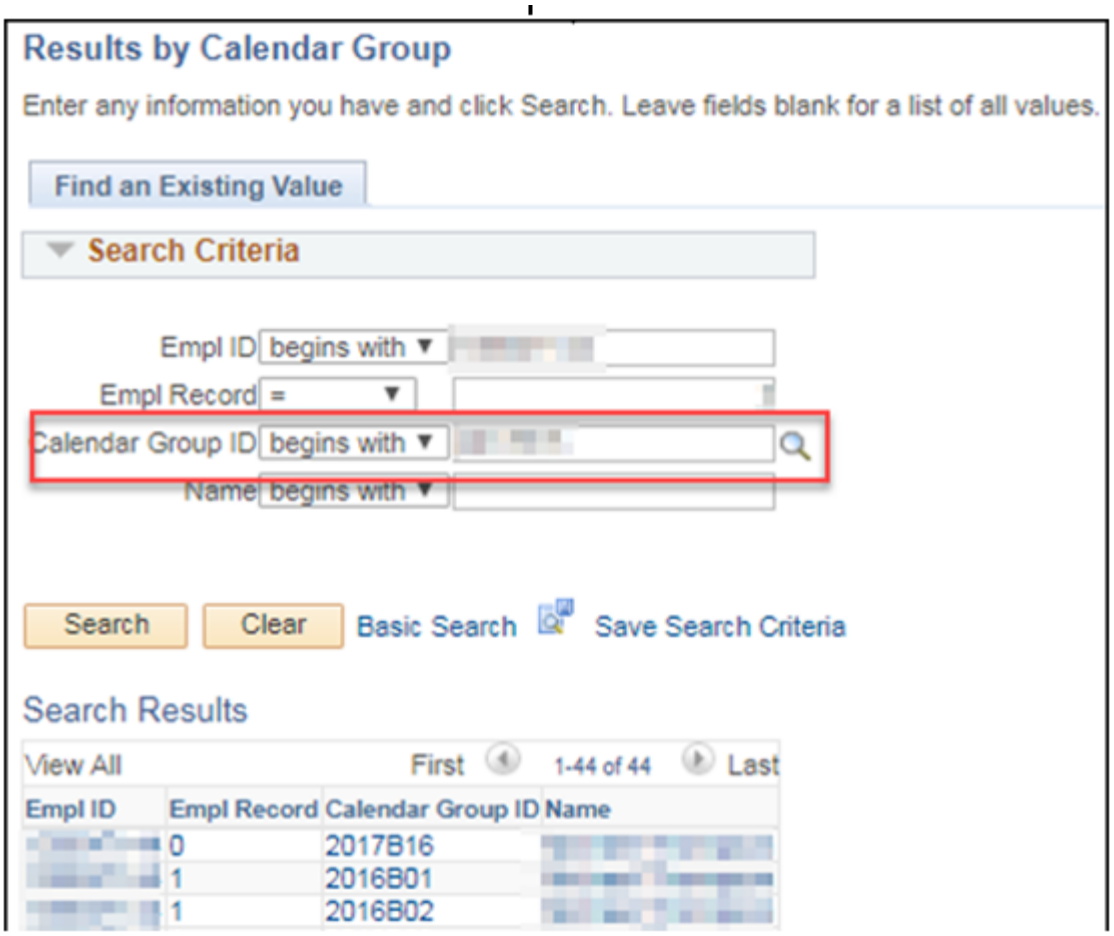
Absences - Transferring Absence Balances

Role: Absence Specialist
STEP 1: Absence balances will automatically *transfer* with the employee. However, all Hire/Rehire rows on Job Data create new absence entitlements.

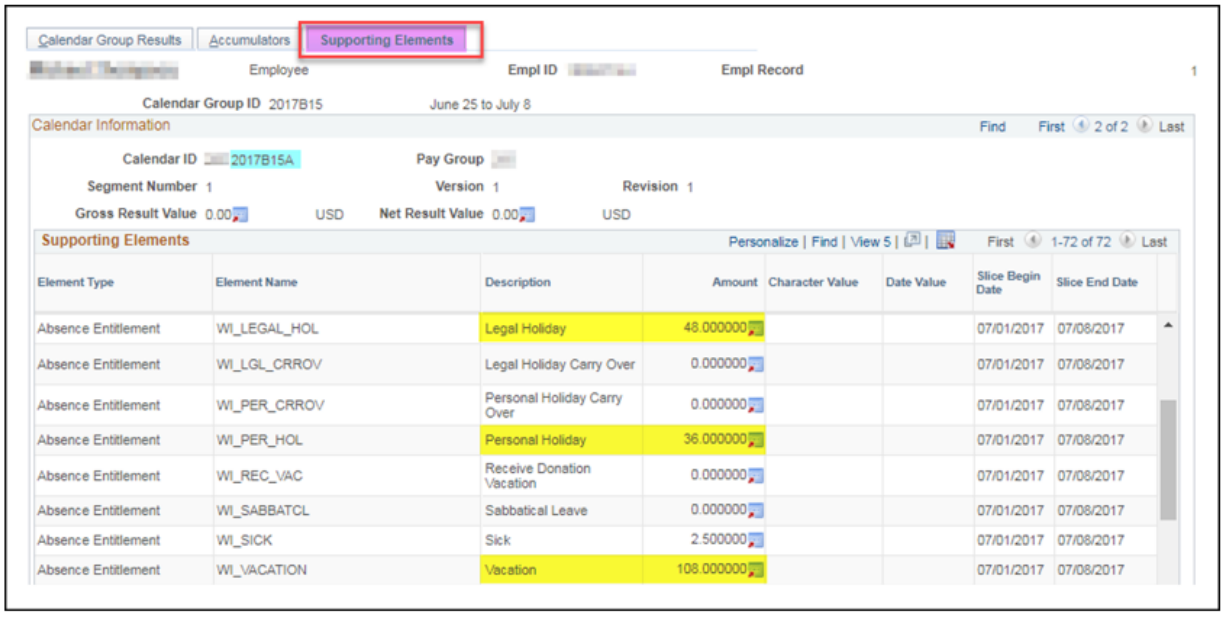
If the employee is keeping their balances from their previous position then the new entitlements are erroneous and need to be deleted.

To identify the erroneous entitlements:

1. Navigation: **Main Menu > Global Payroll & Absence Mgmt> Absence and Payroll Processing> Review Absence/Payroll Info> Results by Calendar Group**
2. Select the Calendar Group ID that coincides with the effective date of the Hire/Rehire row.



3. Go to the Supporting Elements Tab to identify the erroneous amounts

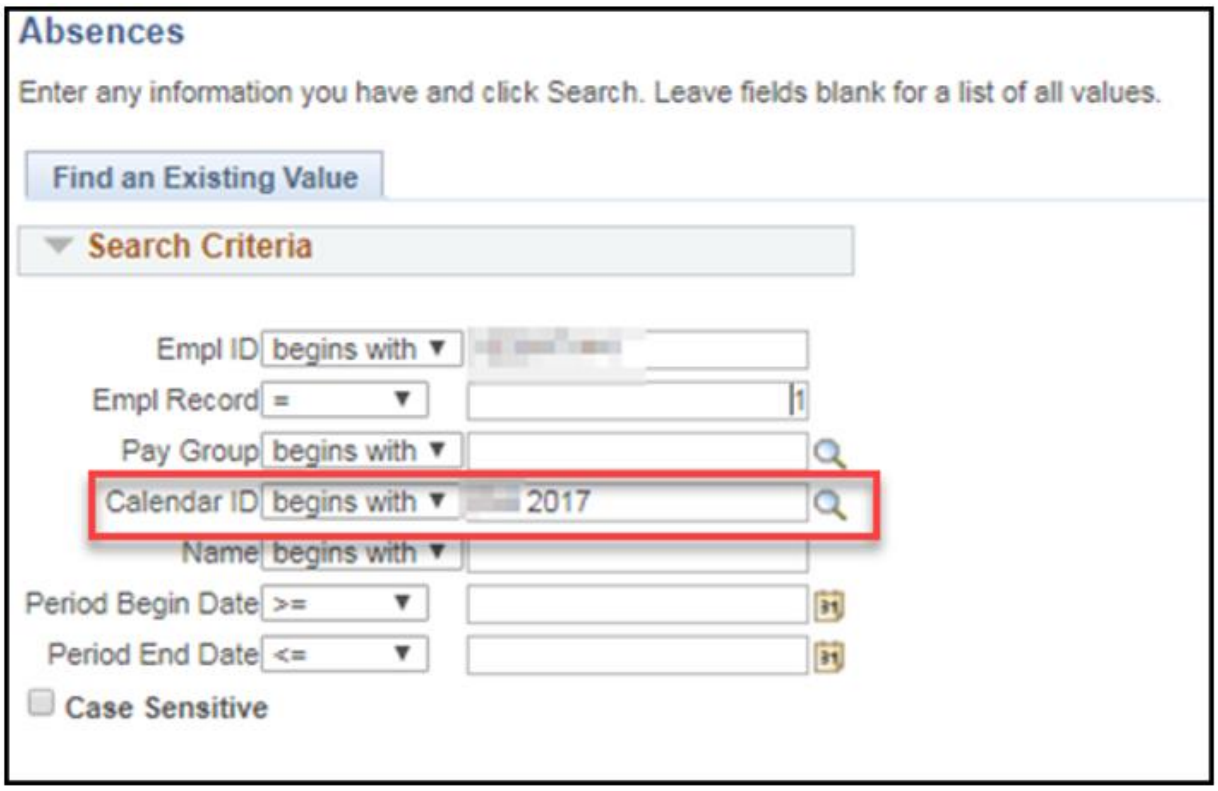


STEP 2: To make the manual adjustment:

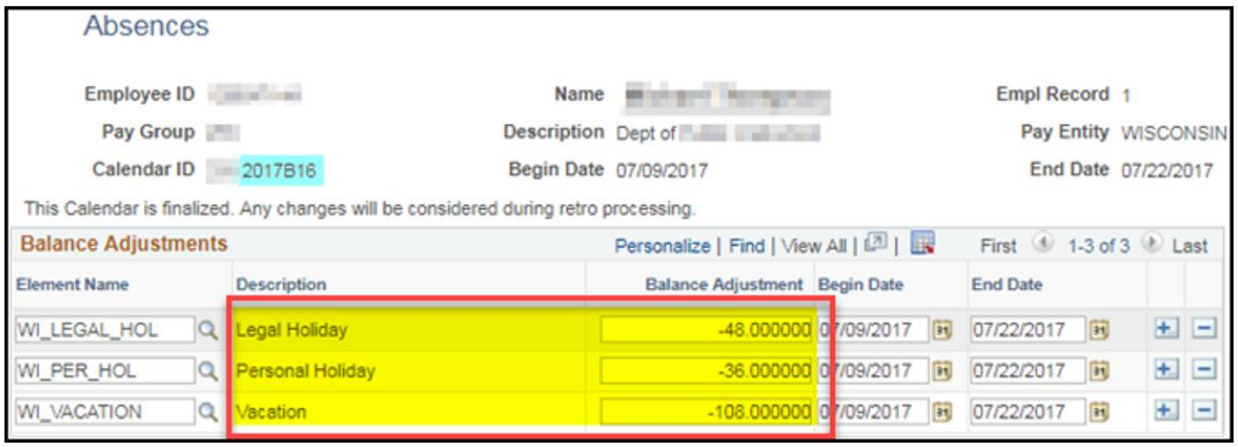
2.3.3 Entering an Unpaid Leave of Absence To Fill an Unclassified or Project Position

1. Go to the Absences page
   Navigation: **Main Menu > Global Payroll & Absence Mgmt> Payee Data> Adjust Balances> Absences**

2. Select the Calendar ID that is one pay period AFTER the effective date of the Hire/Rehire row

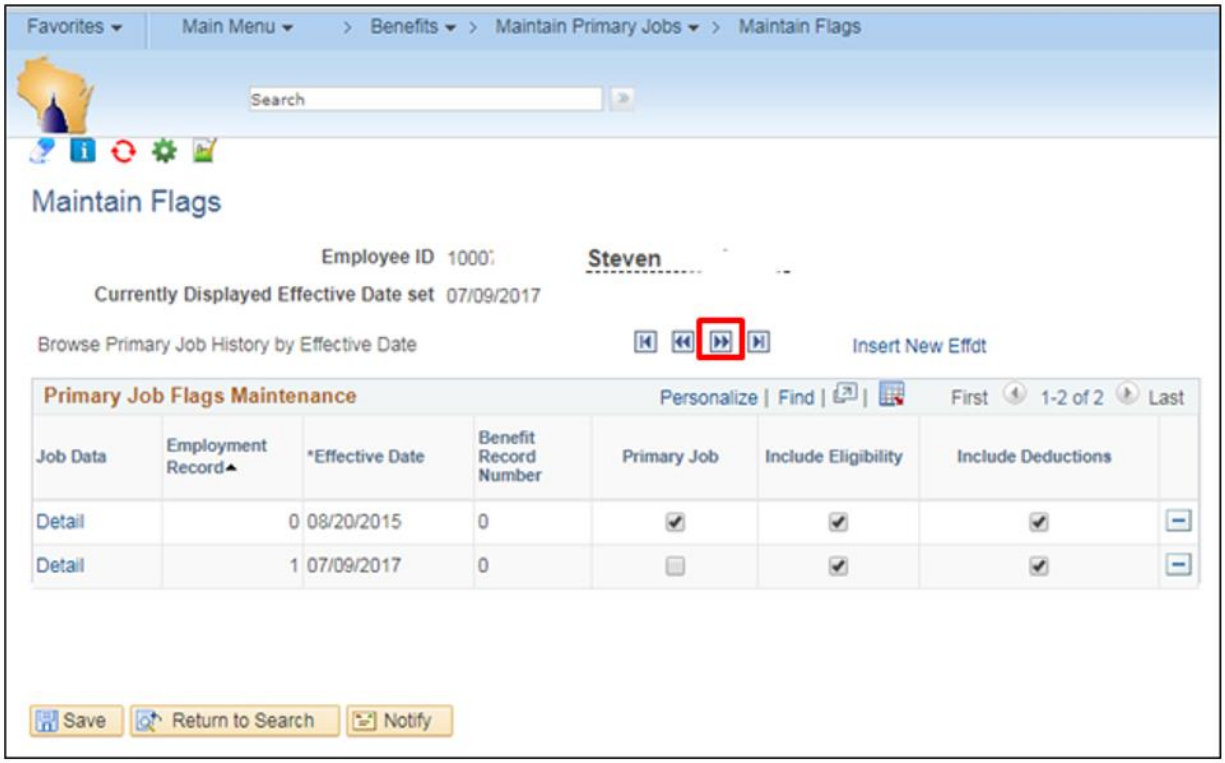


3. Enter the deductions for the erroneous amounts



Benefits – Unclassified/Project Position Is In STAR

STEP 1: The first scenario is the employee is currently a classified employee and is taking an unpaid leave of absence to fill an unclassified position or project position within the STAR system. You will need to switch the benefit flag over to the now active unclassified/project position effective the day the new position starts.

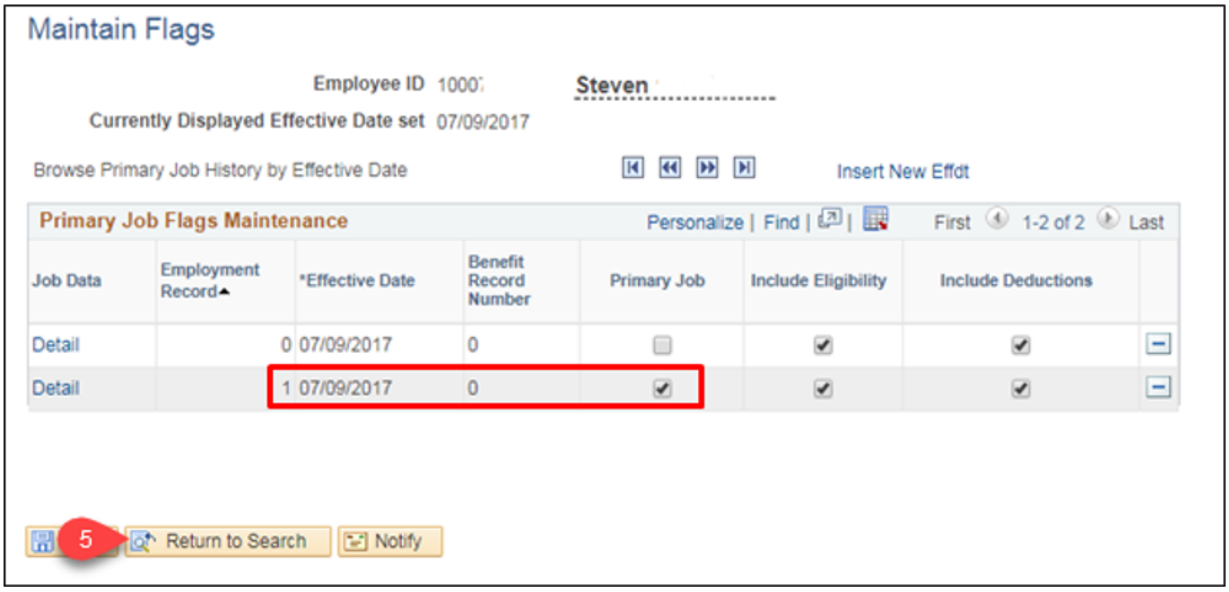


1. **Navigate** to the Maintain Flags screen and pull up the employee
   Navigation: **Main Menu>Benefits>Maintain Primary Jobs>Maintain Flags**
2. Click the arrow to get to the page with the most recent dates
3. Click the check box under the primary job next to the new empl rcd you created for the unclassified position (the effective date should be the same date that the unclassified position begins).

2.3.3 Entering an Unpaid Leave of Absence To Fill an Unclassified or Project Position



4. Click Save.
5. Click Return to Search and then go back into the employee. You should see that the effective dates for each empl rcd are the same, but the checkbox next to the empl rcd that has the unclassified position is checked. Make a note to verify on the next payroll that the benefits have appropriately moved over to unclassified/project position. If this isn't complete prior to the first check, benefit deductions will not take.



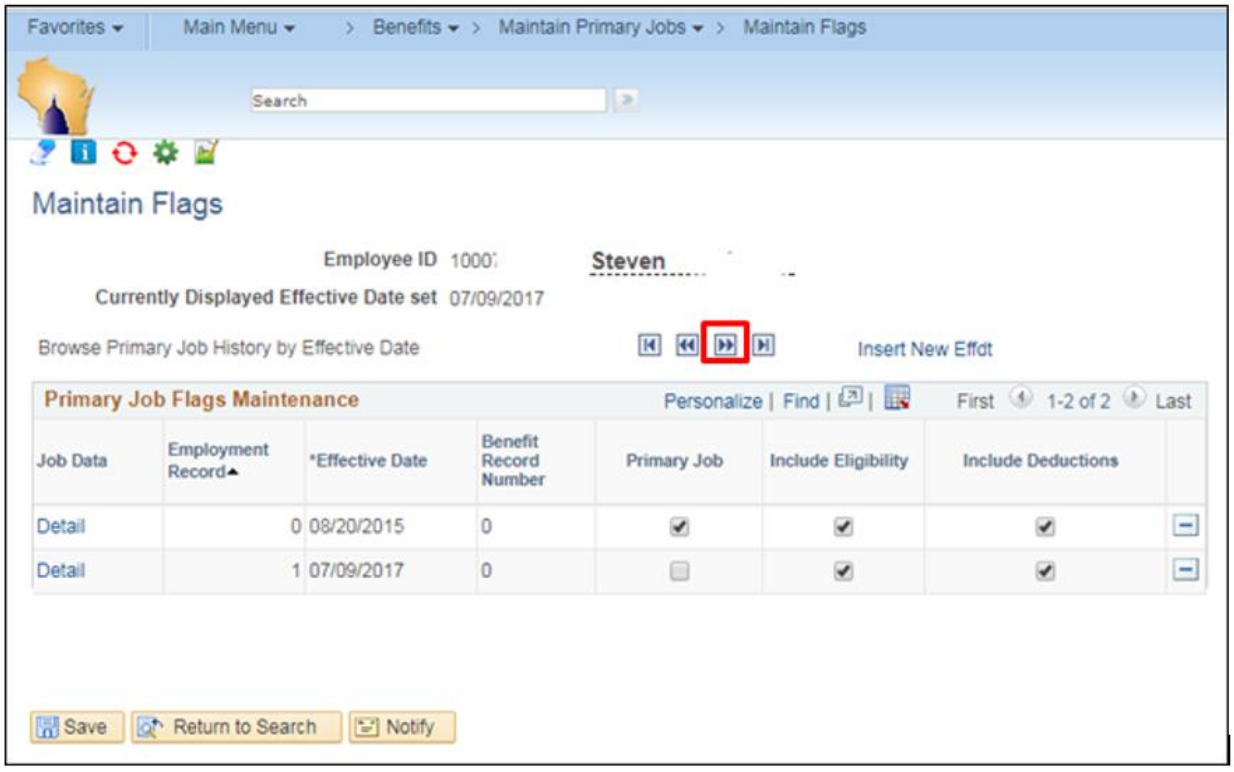
Benefits – Unclassified/Project Position Is External To STAR

The second scenario is that the employee is a classified employee within STAR, but is filling an unclassified position at another payroll center outside of the STAR system.

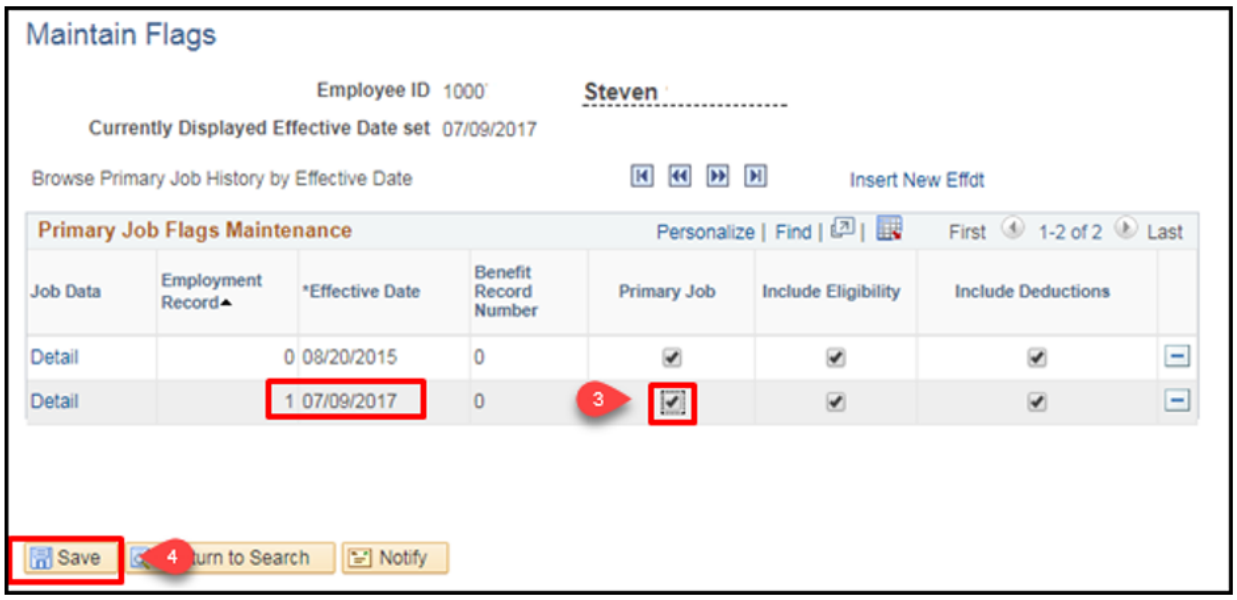
Once the job data entry for the leave of absence has been entered for the classified position, that will create an LOA event. All of the insurances will need to be waived on the LOA event by the benefit administrator. This can be done through the perform election entry (**Main Menu>Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry**). Benefits will be waived effective the 1st of the month on or following the date of the leave of absence. The employee will be eligible for insurances in their new position.

Benefits - One Scenario (Within STAR)

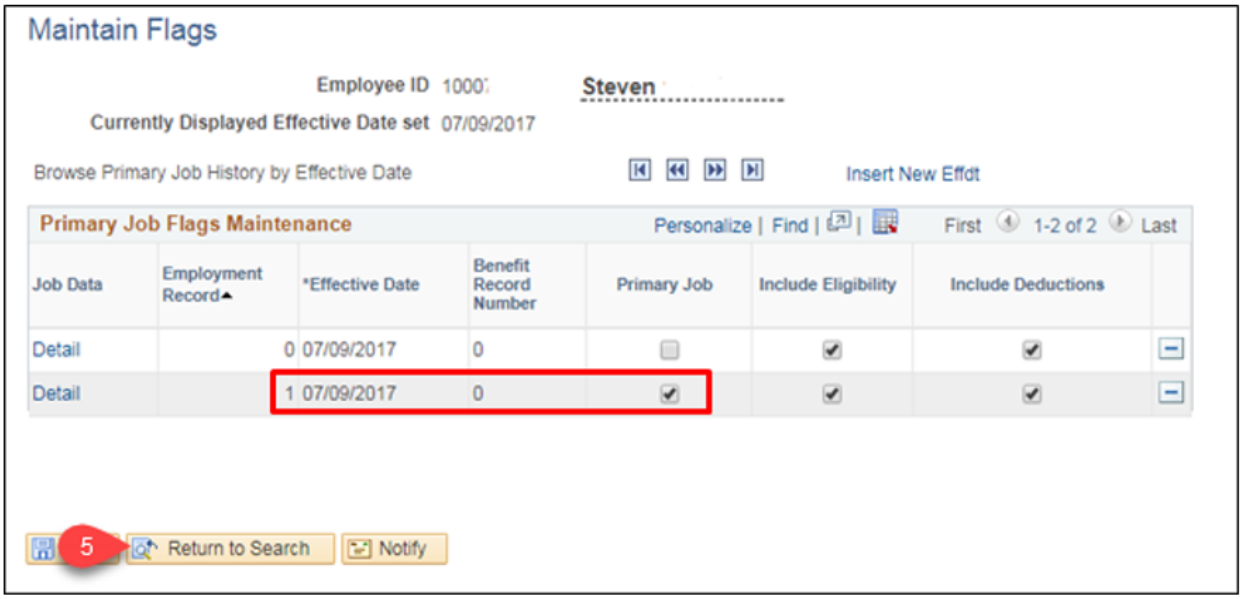
STEP 1: The first scenario is the employee is currently a classified employee and is taking an unpaid leave of absence to fill an unclassified position or project position within the STAR system. You will need to switch the benefit flag over to the now active unclassified/project position effective the day the new position starts.



1. Navigate to the Maintain Flags screen and pull up the employee
   Navigation: **Main Menu>Benefits>Maintain Primary Jobs>Maintain Flags**
2. Click the arrow to get to the page with the most recent dates
3. Click the check box under the primary job next to the new empl rcd you created for the unclassified position (the effective date should be the same date that the unclassified position begins).
4. Click save.



5. Click return to search and then go back into the employee. You should see that the effective dates for each empl rcd are the same, but the checkbox next to the empl rcd that has the unclassified position is checked. Make a note to verify on the next payroll that the benefits have appropriately moved over to unclassified/project position.



Benefits - Second Scenario (External)

The second scenario is that the employee is a *classified employee* within STAR, but is filling an unclassified position at another payroll center outside of the STAR system.

Once the job data entry for the leave of absence has been entered for the classified position, that will create an LOA event. All of the insurances will need to be waived on the LOA event by the benefit administrator. This can be done through the perform election entry (Main Menu>Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry). The employee will be eligible for insurances in their new position.

Checklist: Entering Unpaid Leave of Absence to Fill an Unclassified or Project Position



Download and print this checklist if necessary by clicking on the icon. Or, review the checklist below.

Checklist: Entering Unpaid Leave of Absence to Fill an Unclassified or Project Position

Name: _____ Empl ID:

_____

☐ **CREATE A SURPLUS POSITION (Optional)**

Role: *Agency Position Management Specialist*

Create a surplus position to be applied to the employee's job data while they are on unpaid leave from their primary position. Refer to the Creating and Updating Position Data Job Aid.

☐ **UPDATE JOB DATA FOR THE UNPAID LEAVE OF ABSENCE**

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** >**Job Information** > **Job Data**

☐ **ADD AN EMPLOYMENT INSTANCE FOR THE UNCLASSIFIED OR PROJECT POSITION**

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** >**Job Information** > **Job Data** > **Add Employment Instance**

☐ **UPDATE BIOGRAPHICAL DATA**

Role: *Agency HR Specialist*

Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person**

UPDATE TIME REPORTER DATA

Role: *Agency Time and Labor Specialist or Agency HR Specialist*

INACTIVATE TIME AND LABOR ON THE INITIAL EMPLOYMENT INSTANCE

- *If entered by the Agency Time and Labor Specialist* – Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Maintain Time Reporter Data**

ENTER TIME AND LABOR ON THE UNCLASSIFIED/ PROJECT EMPLOYMENT INSTANCE

- *If entered by the Agency Time and Labor Specialist* – Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Create Time Reporter Data**

ASSIGN A SCHEDULE

Role: *Agency Time and Labor Specialist*

Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Assign Work Schedule**

TRANSFER ABSENCE BALANCES

Role:*Agency Absence Specialist*

Navigation: **Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar Group**

Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences**

ADJUST BENEFITS

Role: *Agency Benefits Specialist*

SCENARIO ONE: UNCLASSIFIED/PROJECT POSITION IS IN STAR

Navigation: **Main Menu > Benefits > Maintain Primary Jobs > Maintain Flags**

SCENARIO TWO: UNCLASSIFIED/PROJECT POSITION IS EXTERNAL TO STAR

Navigation: **Main Menu > Benefits > Manage Automated Enrollment > Participant Enrollment > Perform Election Entry**

Resources

1. Filling an Unclassified Appointment: .; s. 230.33, Wis. Stats.; & Ch. ER-MRS 16, Wis. Adm. Code s. 230.33, Wis. Stats. Restoration Bulletin; State of Wisconsin Compensation Plan
2. Leave of absence - s. ER 18.14, Wis. Adm. Code; WHRH 740

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
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2.3.4 Military Leave

Under Construction



Resources

- Restoration after military leave: s. 230.32, Wis. Stats.
- Military Service: s. ER 18.08, Wis. Adm. Code

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.4 Termination/Retirement/Completion

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2.4.1 Termination/Retirement

Notes On This Chapter
HR – Update Job Data
Time and Labor - Adjust And Inactivate Time
Identify Time Reporters with Time after Term Date
    Adjust Timesheet Entries
    Update Time Reporter Data
    Calculate Comp Time Payout Balances
Absence - Review And Adjust Leave Balances
Absence - Delete Future Dated Leave Entries
Payroll - Pay Out/Collect Leave (If Applicable)
Payroll - Set Final Advice Statement To Print
Payroll - End General Deductions
Payroll - End Additional Pay
Payroll - Verify Pay For Exception Time Reporters
Payroll – Inactivate Direct Deposit (After Last Payroll Has Been Confirmed By Central Payroll)
Payroll - Request Garnishment Suspension
Benefits - Termination/Retirement Event
    Finalize the Benefits Event
    Reconcile the Employee's Benefit Deductions
Benefits - Terminations Processed In A Month That Has A "C: Pa Period or Employees Who Terminate Prior To Paying For A Full Month Of Coverage
Benefits - Verify Benefits Termination
Checklist: Termination-Retirement

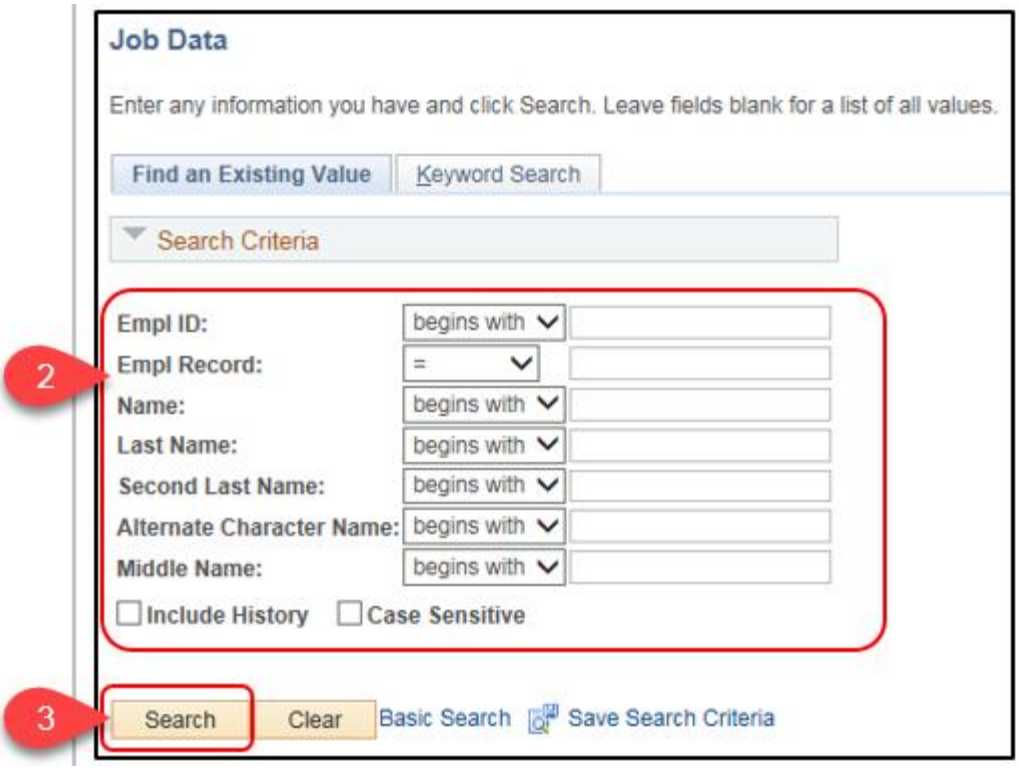
Notes On This Chapter

- The scope of the chapter only covers those processes directly related to terminating or retiring an employee or completing their appointment.
- Fields, icons, and buttons not addressed are either not being used by the State or are not applicable to the topic.
- At the start of each process, the associated PeopleSoft security role is identified.
- See the Employee Movement job aid for information on Terming and Rehiring employees.

HR – Update Job Data

Role: Agency HR Specialist
STEP 1: Navigate to the Job Data page and locate the employee.

1. Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**
2. Enter the desired search criteria in the Find an Existing Value tab.
3. Click **Search**.

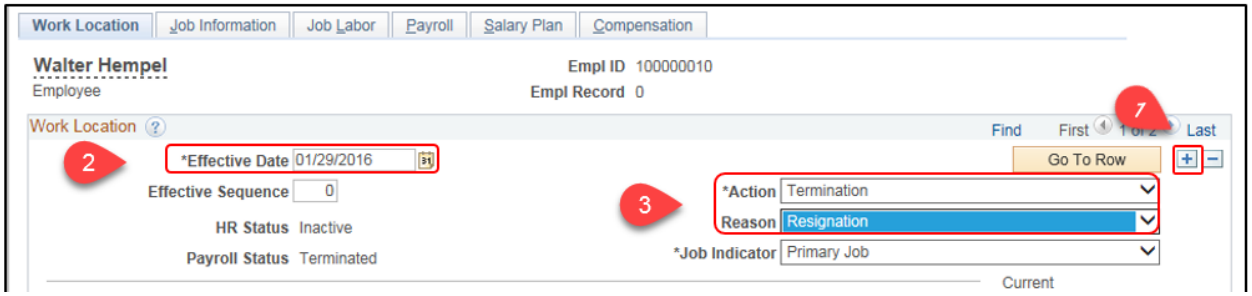


4. If multiple employees result, click the desired employee from the search results list.

STEP 2: Add a row with the termination/retirement/completion Action/Action Reason to the employee's Job Data record.

1. On the **Work Location** tab, click **Add a Row (+)**.
2. Enter or select the desired **Effective Date** of the termination. This should be first day the person is no longer an employee.
   For example, if a person's last day as an employee is November 12th, the effective date on the termination row on the Job Data page is November 13th. This also applies when an employee passes away. The termination due to death should be the day after the employee passed away.
3. Select the appropriate Action and Reason. See the Action/Action Reason chapter for additional information.

If entering a Retirement, do not enter the retirement transaction until after all paid time is used and the employee is no longer on the State payroll in any form.



4. Click **Save**.

Time and Labor - Adjust And Inactivate Time

Role: Time and Labor Specialist

Identify Time Reporters with Time after Term Date

Run the **WI_TERM_W_TIME** query.

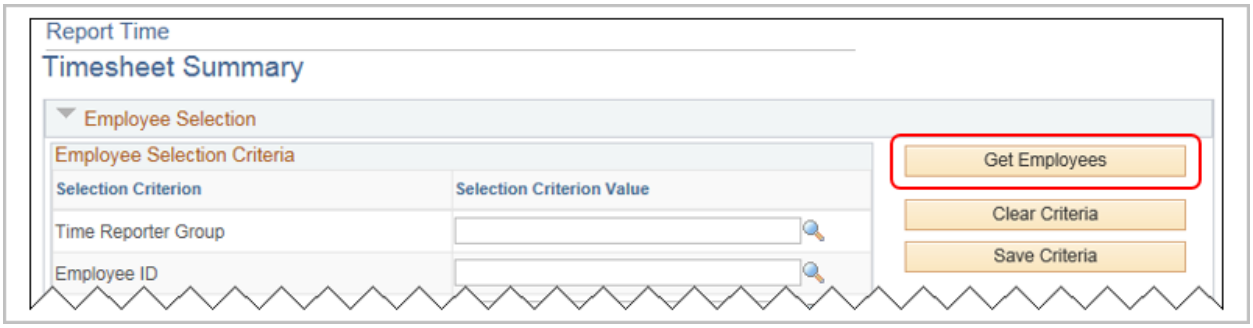
1. Navigation: **Main Menu > Reporting Tools > Query > Query Manager**
   For complete instructions on running a query, refer to the How to Run Reports and Queries Job Aid.
2. Take note of any positive time reporters with time after their term/retirement date.
3. If an employee is showing on this report in error, contact HR to correct their termination data.

	Unit	ID	Empl Record	Last	First Name	Pay Status	Org Relation	Dept ID	Workgroup	Term Date	Rpt Dt	TRC	Quantity	Status	Frozen	Frozen Date
1	50500	1000	0			Terminated	EMP	505S200000	WISEXCEPT	01/04/2016	01/05/2016	REGLR	8.000000	Closed	Y	01/12/2016
2	50500	1000	0			Terminated	EMP	505S200000	WISEXCEPT	01/04/2016	01/06/2016	REGLR	8.000000	Closed	Y	01/12/2016
3	50500	1000	0			Terminated	EMP	505S200000	WISEXCEPT	01/04/2016	01/07/2016	REGLR	8.000000	Closed	Y	01/12/2016
4	50500	1000	0			Terminated	EMP	505S200000	WISEXCEPT	01/04/2016	01/08/2016	REGLR	8.000000	Closed	Y	01/12/2016

Adjust Timesheet Entries

Adjust timesheet entries present after termination/retirement/completion date.

1. Navigation: **Main Menu > Manager Self Service > Report Time > Timesheet**
2. Enter or select the desired selection criteria.
3. Click **Get Employees.**

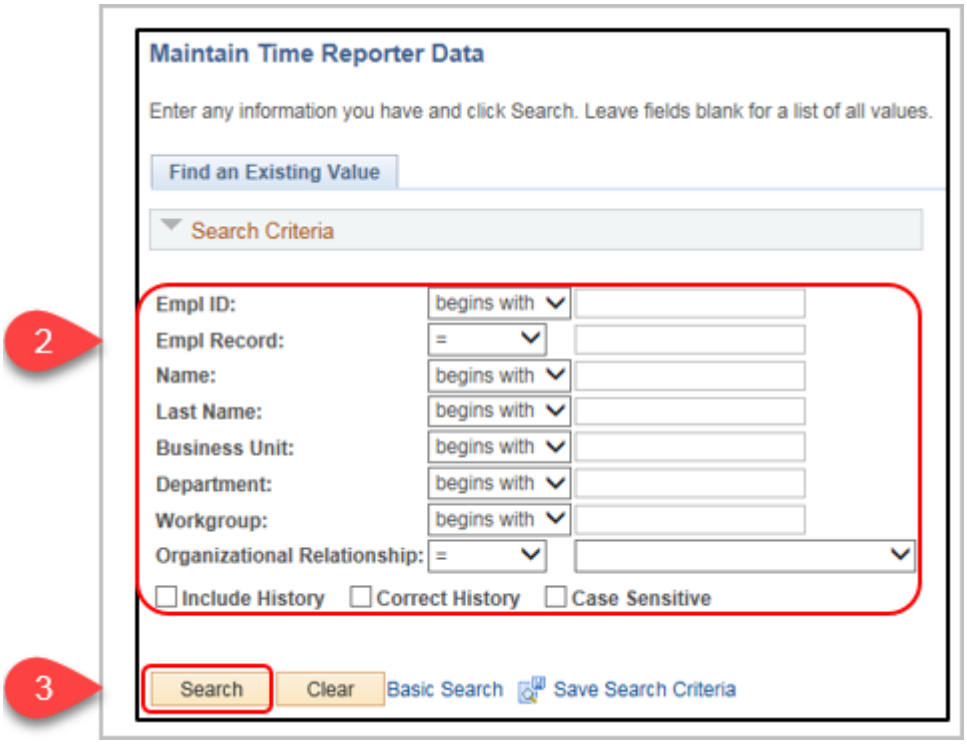


4. From the results listed at the bottom of the page, click the Last Name of the desired employee.
5. Clear any time entries after the employee's last day.
    - For a Positive Time Reporter: Remove the entries on days the employee did not work.
    - For an Exception Time Reporter: Enter a zero (0) for the days the employee did not work. This effectively overrides the automatic assignment of daily hours.
6. Click **Submit**.

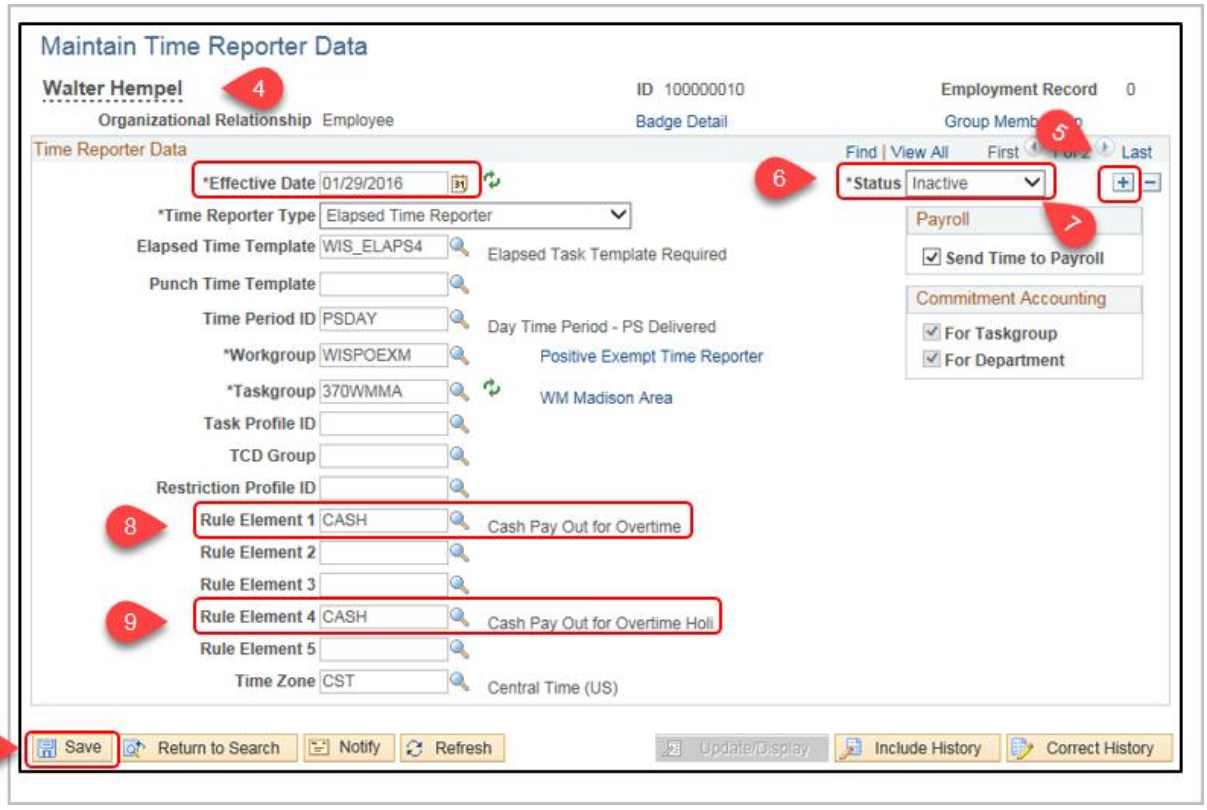
Update Time Reporter Data

Inactivate the employee's time reporter data (shutting down their timesheet) as of their effective date of termination/retirement and set any overtime to be paid out in cash.

1. Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporters**
2. Enter the desired search criteria.
3. Click **Search**.



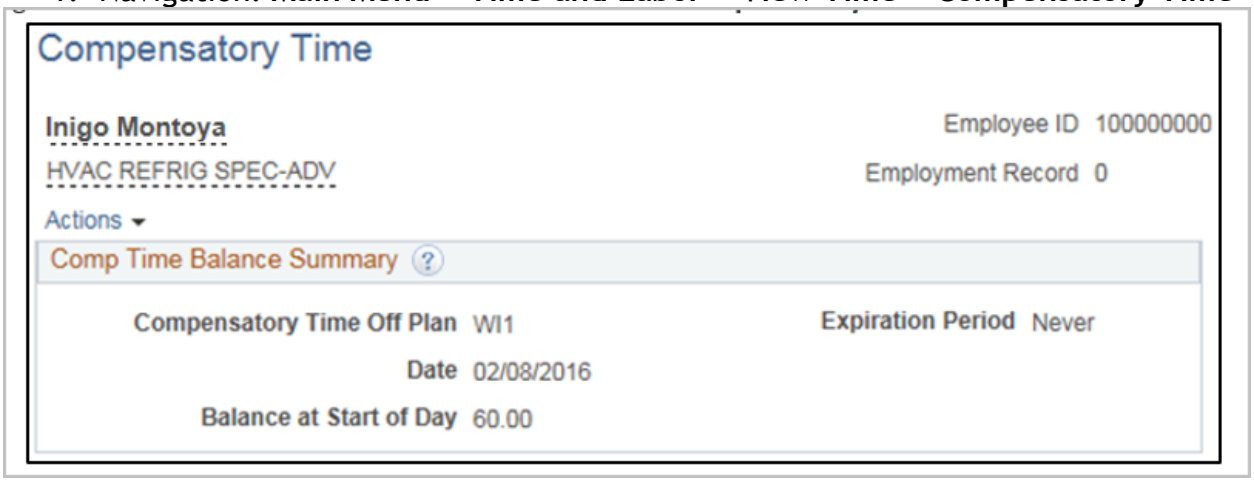
4. If multiple employees result, click the desired employee from the Search Results list.
5. On the Maintain Time Reporter Data page, click **Add a Row (+)**.
6. Enter or select the Effective Date.
   This should match the effective date of the termination/retirement – the first day the employee no longer works at the State.
7. Select Inactive from the Status list.
8. Enter or select **CASH** in Rule Element 1.
9. Enter or select **CASH** in Rule Element 4.
10. Click **Save**.



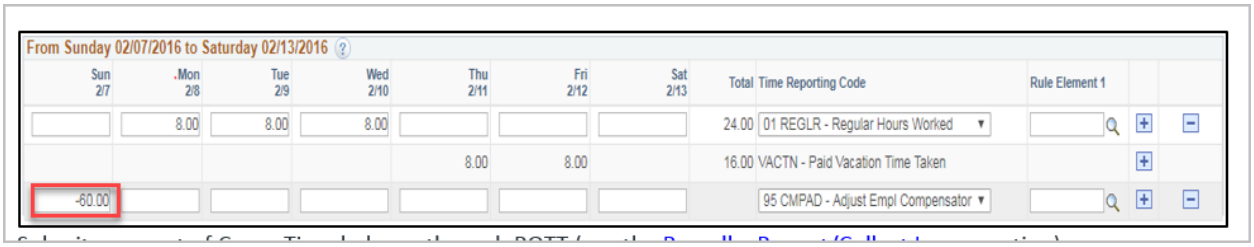
Calculate Comp Time Payout Balances

Locate and review the employee's Comp Time balances.

1. Navigation: **Main Menu > Time and Labor > View Time > Compensatory Time**



2. Zero out Comp Time balance on timesheet by entering a negative quantity of **TRC CMPAD** on a non-working day of last week in pay status.



3. Submit a payout of Comp Time balance through POTT (see the Payroll – Payout/Collect Leave section)

Absence - Review And Adjust Leave Balances

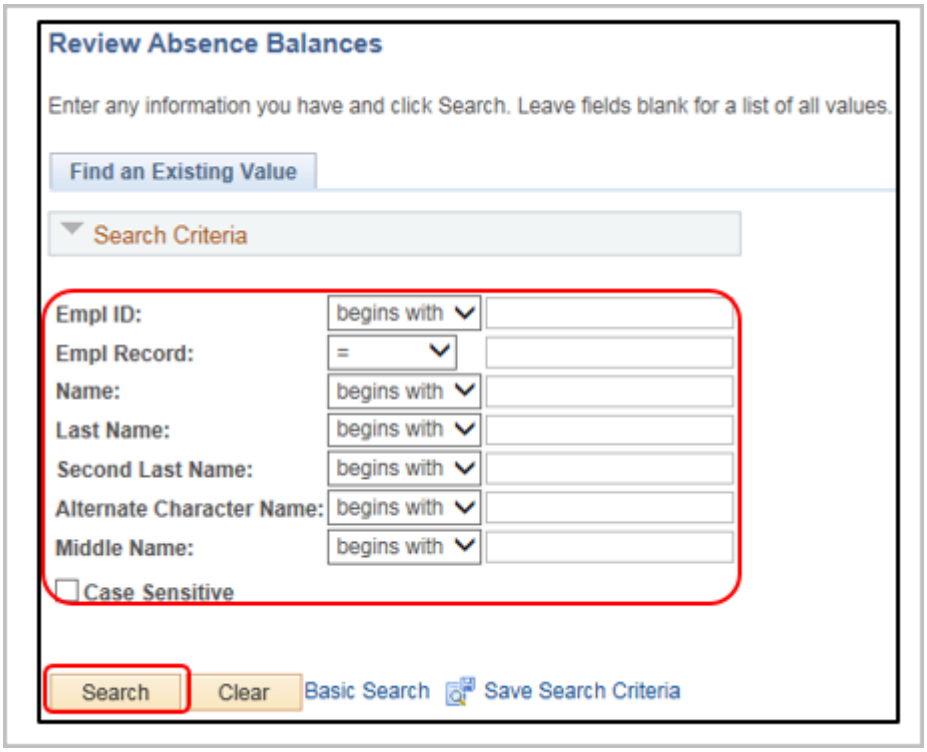
Role: Agency Absence Specialist
Identify leave balances and note whether to payout unused earned leave or collect overdrawn leave. If paying out unused leave or collecting overdrawn leave, create a POTT and then zero out all balances as outlined in Step 5 below.

STEP 1: Review full details of an employee's current balances, used year-to-date balances, and any balance adjustments, by navigating to the Results by Calendar Group page.

1. Navigation: **Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Process > Review Absence/Payroll Info > Results by Calendar Group**
2. When selecting an employee's information from the search results, be certain to select the calendar group for the last pay period that was finalized. Calendar ID format is Year, Biweekly indicator, Pay Period number. [YYYY][B][##]

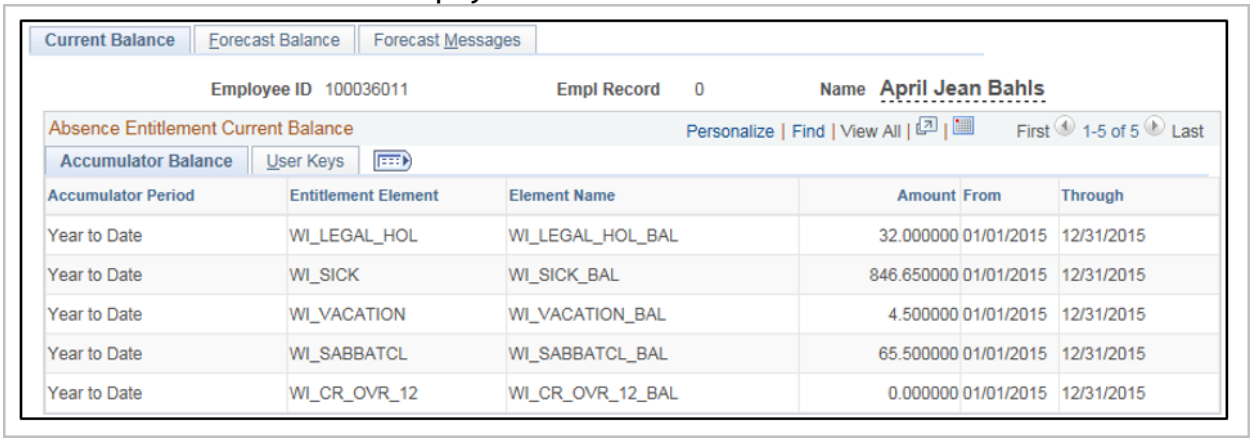
STEP 2: Navigate to the Absence Balances page and find the affected employee

1. Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances**
2. Enter the desired search criteria in the Find an Existing Value tab.
3. Click **Search**.



4. If multiple employees result, click the desired employee from the Search Results list.

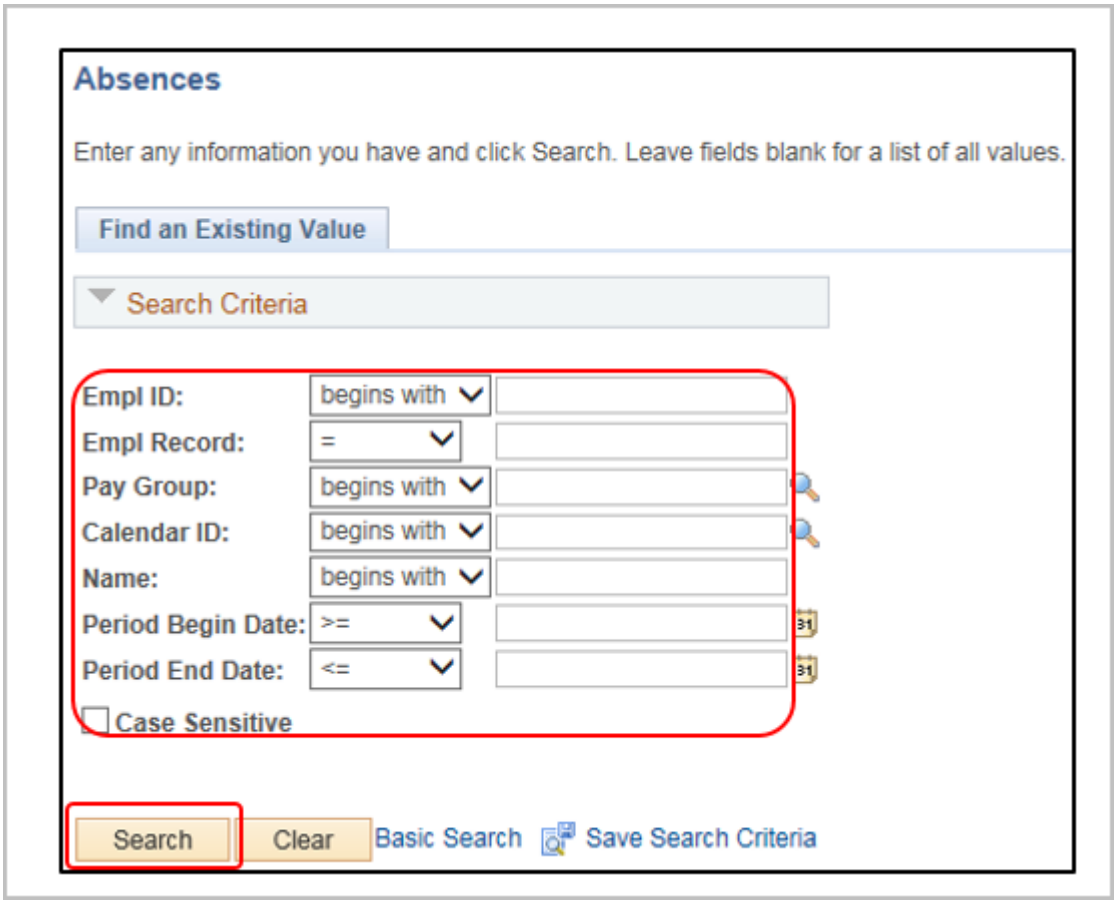
STEP 3: Review and note the employee's current available leave balance and calculate earned amounts for payouts.



Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Year to Date	WI_LEGAL_HOL	WI_LEGAL_HOL_BAL	32.000000	01/01/2015	12/31/2015
Year to Date	WI_SICK	WI_SICK_BAL	846.650000	01/01/2015	12/31/2015
Year to Date	WI_VACATION	WI_VACATION_BAL	4.500000	01/01/2015	12/31/2015
Year to Date	WI_SABBATCL	WI_SABBATCL_BAL	65.500000	01/01/2015	12/31/2015
Year to Date	WI_CR_OVR_12	WI_CR_OVR_12_BAL	0.000000	01/01/2015	12/31/2015

STEP 4: Navigate to the Absences page.

1. Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences**
2. Enter the employee's **Empl ID**.
3. Click **Search**.



4. Select the desired Calendar ID for the employee from the Search Results list.

STEP 5: Remove the appropriate entitlement balances.

1. On the Absences page, select the desired Element Name.
2. Based on the transaction, balances should be cleared as follows:
    - Termination (most reasons, except those listed below):
        - Zero out vacation, personal holiday, legal holiday, and sabbatical
        - Sick leave remains on their record
    - Termination with Transfer to Affiliate:
        - Zero out all balances and complete a personnel transfer record (PTR)
    - Termination due to Misconduct:
        - Zero out all balances
    - Termination when Leaving State Service:
        - Zero out vacation, personal holiday, legal holiday, and sabbatical
        - If sick leave is eligible to be certified to ETF, zero out the balance (sick leave remains with ETF until the employee reaches retirement age)
        - If sick leave is NOT eligible to be certified, do nothing; remains on their record
    - Retirement:

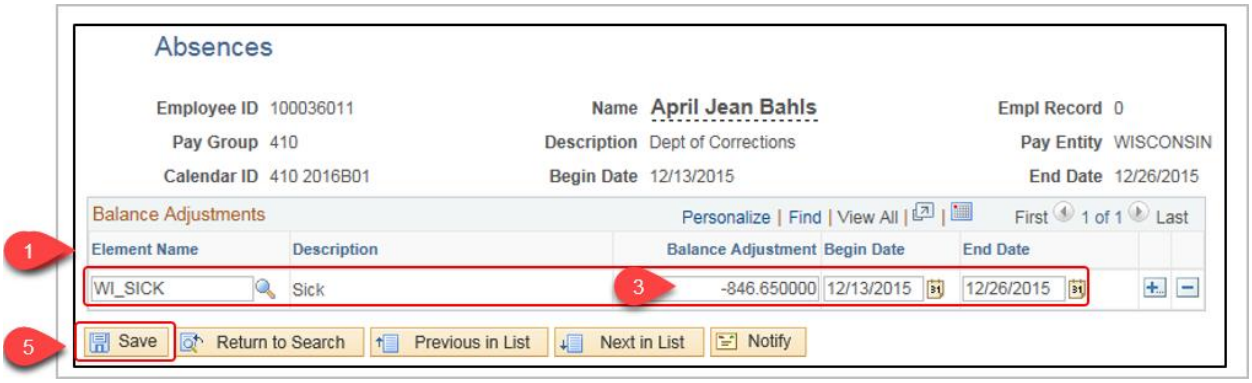
- Zero out vacation, personal holiday, legal holiday, and sabbatical
- If sick leave is eligible to be certified to ETF, zero out the balance
- If sick leave is NOT eligible to be certified, sick leave remains on their record

- Completion:
  - For Project employees – zero out all balances

3. Enter the appropriate amount in the Balance Adjustment field to remove all of the entitlement balance.

When removing balance, make sure the adjustment is entered as a negative number to deplete the balance. Without the negative symbol, the balance would increase.

4. Repeat the steps for each balance that should be zeroed out.
5. Click **Save**.



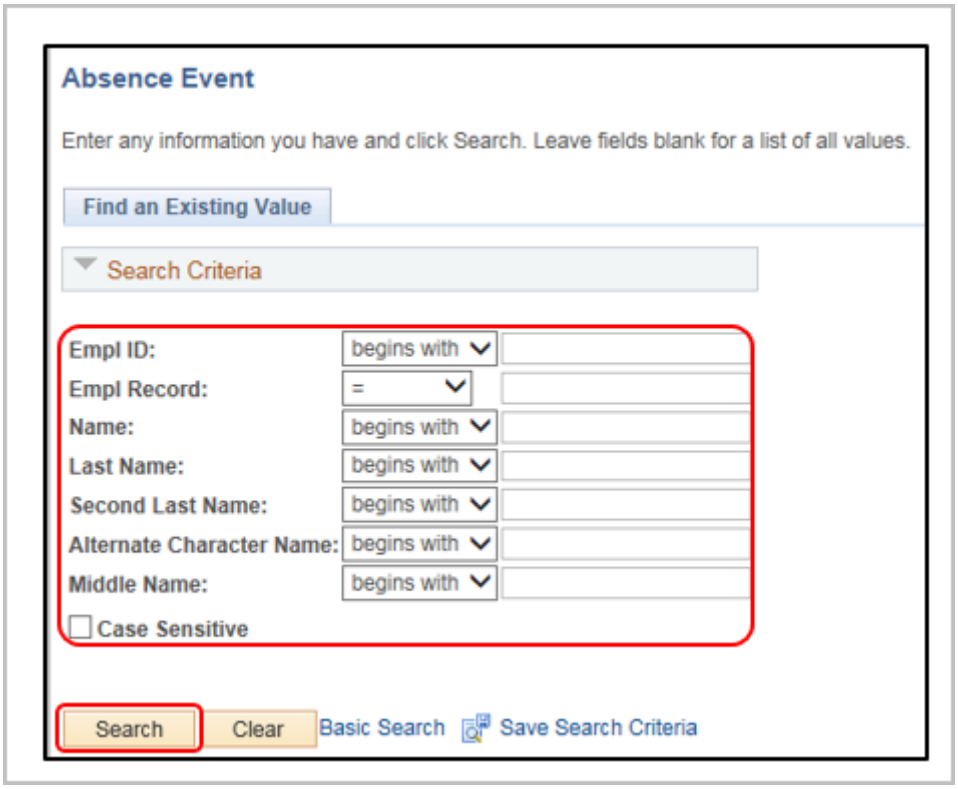
Absence - Delete Future Dated Leave Entries

Role: Agency Absence Specialist

Check for absence events dated after the termination date and delete those events. This can be done by searching the **Absence Event** page (any time after receiving notification of the termination) or by running the **WI_TERMINATED_WITH_ABSENCE** query after the termination has been entered.

STEP 1: Search for future dated absence.

1. Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event**
2. Enter the desired search criteria in the Find an Existing Value tab.
3. Click **Search**.

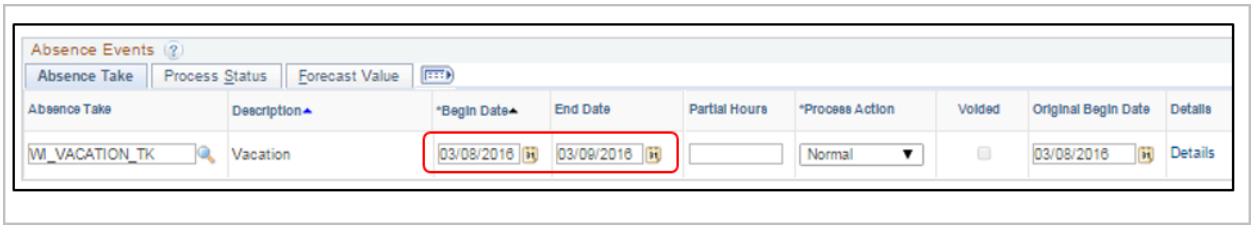


4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Adjust the **From** and **Through** Dates to be after the employee's last day of employment.

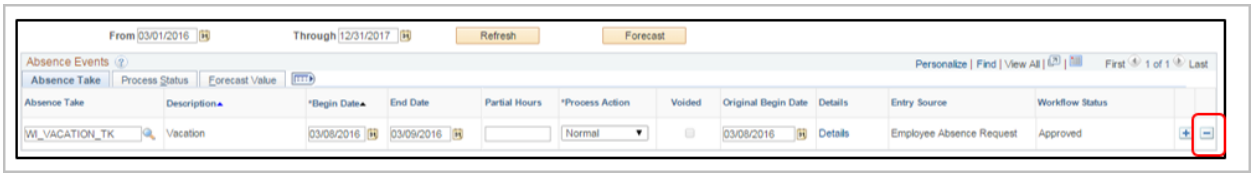


1. Click **Refresh**.
   - If no dates are displayed, there isn't anything further that needs done.
   - If dates are returned, they need to be deleted (Assume a termination of 2/28/2016 for the displayed examples). Continue to the next step.

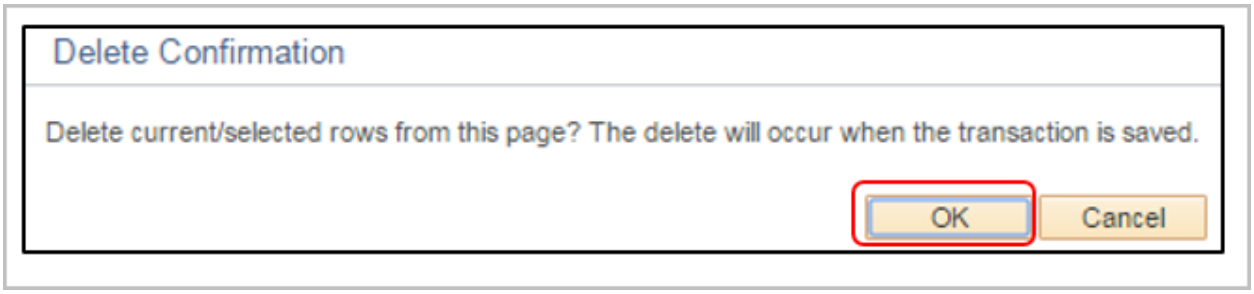


STEP 3: Delete the future dated entries.

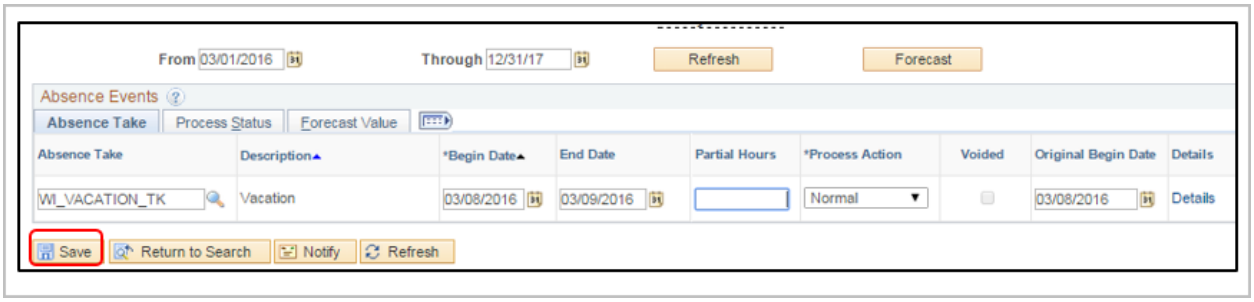
1. Click **Delete a Row (-)** next to the rows with the future dated entries



2. Click **OK** to confirm the deletion. The row deletes when the page is saved.



3. Click **Save**.



STEP 4: Run **WI_TERMINATED_WITH_ABSENCE** query to validate no further future dated absences are entered (this can only be ran after the term has been entered into the system).

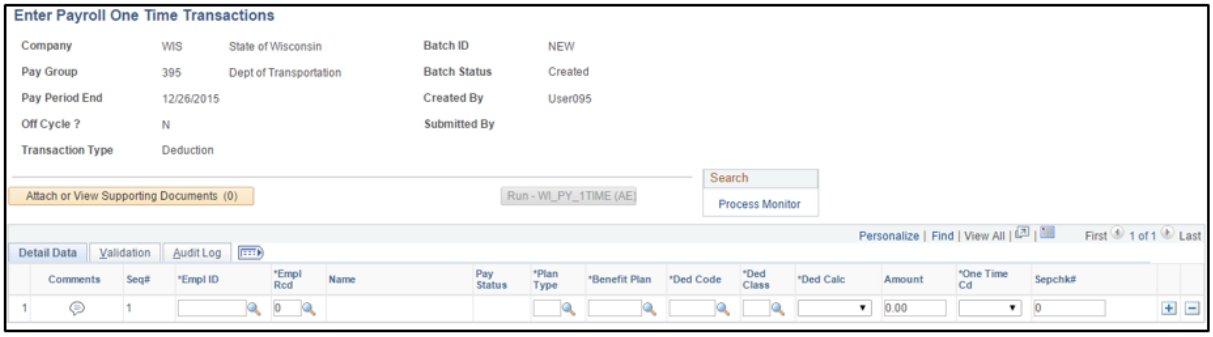
1. Navigation: **Main Menu > Reporting Tools > Query > Query Manager**
2. For complete instructions on running a query, refer to the How to Run Reports and Queries job aid.

Payroll - Pay Out/Collect Leave (If Applicable)

Role: Agency Payroll Specialist

1. Navigation: **Main Menu > State of Wisconsin (STAR) > Payroll > Process > Enter Payroll One Time Trans**
2. Process leave pay outs through the Pay One Time Transaction (POTT).
3. Process any general or benefit deduction refunds or additions through the POTT.

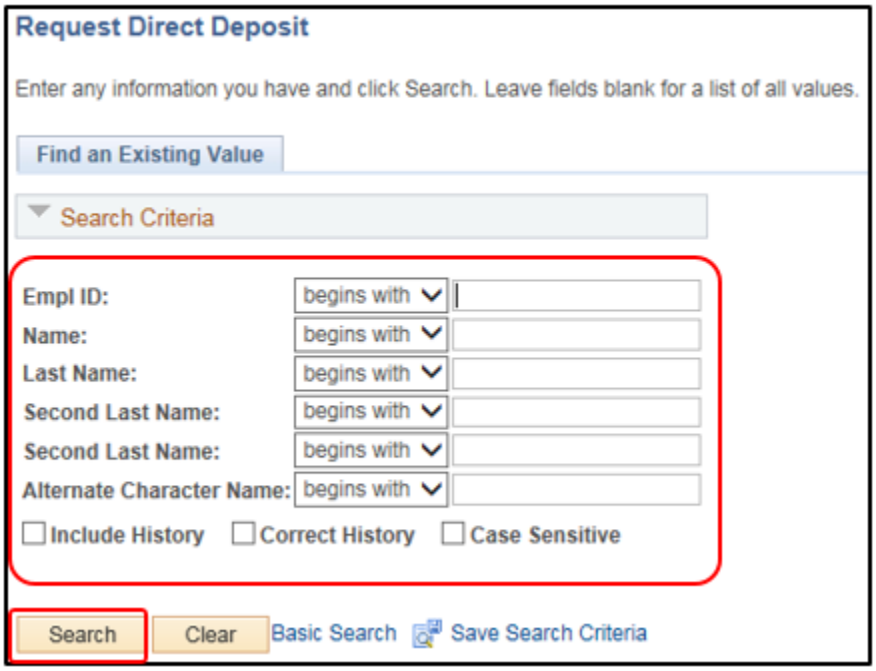
4. Refer to the Pay One Time Transactions Job Aid for complete details on the POTT process.



Payroll - Set Final Advice Statement To Print

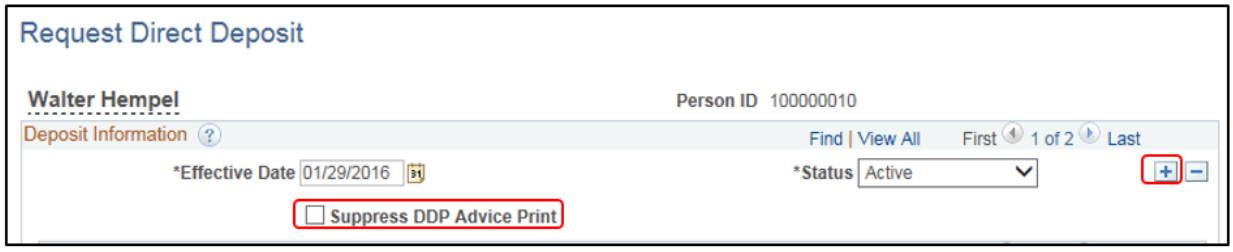
Role: Payroll Specialist Role

1. Turn off Suppress DDP Advice Print on Request Direct Deposit page. During the last Payroll, set the employee's final advice statement to print.
2. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**
3. Enter the desired search criteria.
4. Click **Search**.



5. If multiple employees result, click the desired employee from the Search Results list.
6. Click **Add a Row (+)**

7. Uncheck the Suppress DDP Advice Print checkbox.

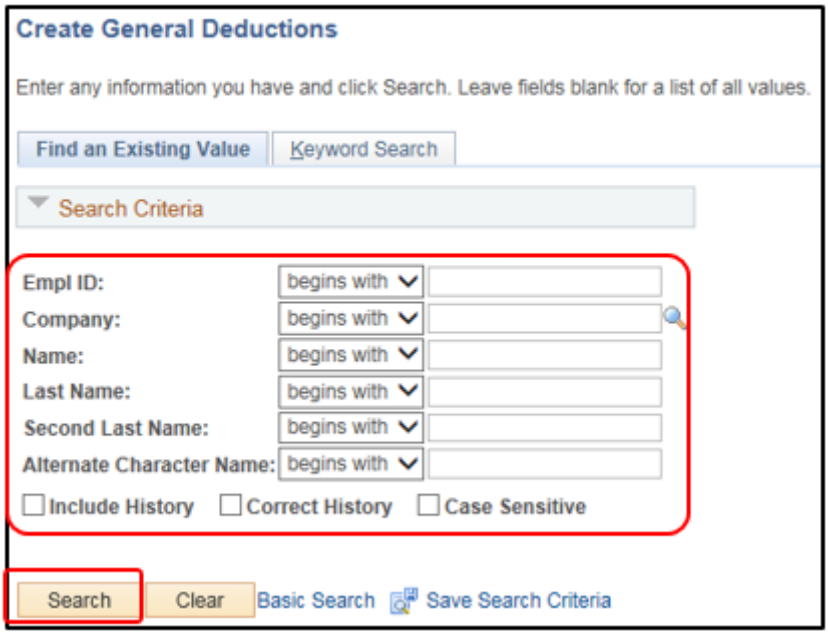


8. Click **Save**.

Payroll - End General Deductions

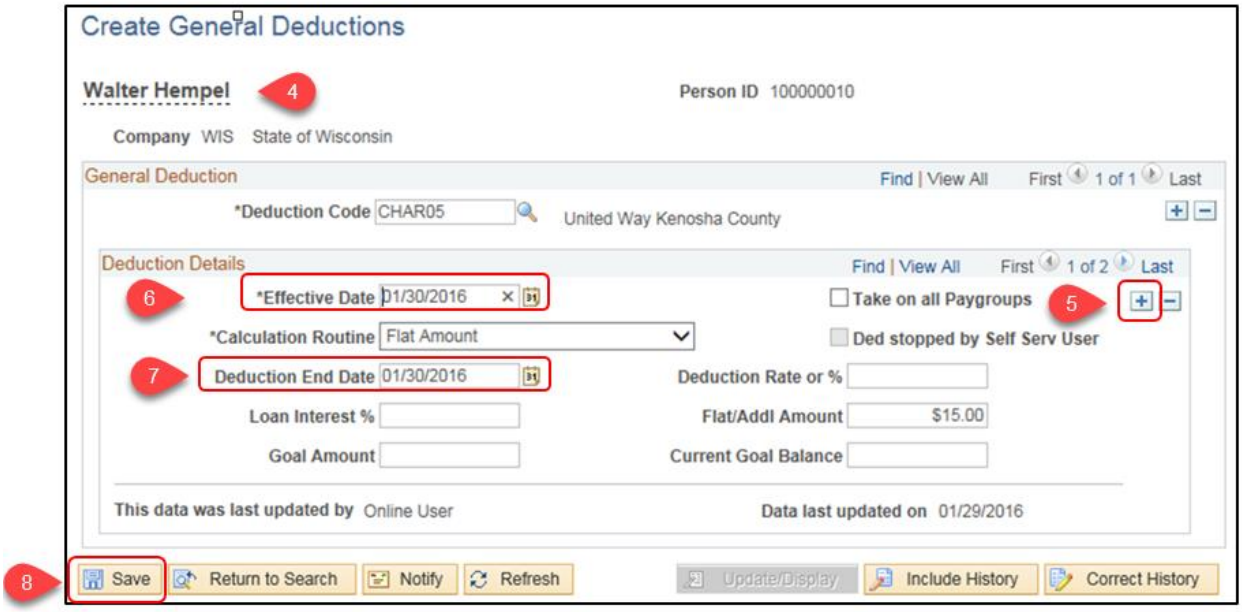
Role: Payroll Specialist Role
End all General Deductions by setting the effective date and end date to the last day of the last pay period the deduction should be taken.

1. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions**
2. Enter the desired search criteria.
3. Click **Search**.

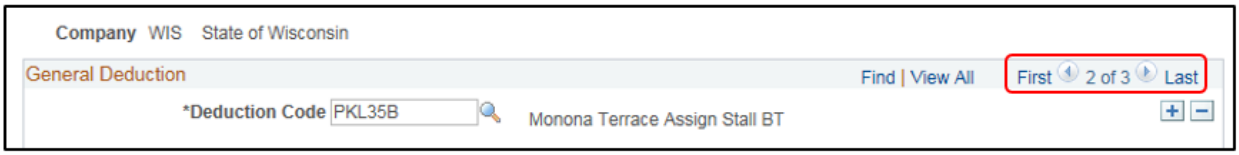


4. If multiple employees result, click the desired employee from the **Search Results** list.
5. Click **Add a Row (+)** in the Deduction Details section.
6. Enter or select an **Effective Date**. This should be the last day of the last pay period the deduction should be taken.

7. Enter or select a **Deduction End Date**. This should be the last day of the last pay period the deduction should be taken.
8. Click **Save**.



9. If the employee has multiple deductions, navigate through all deductions by selecting the Previous or Next arrows in the General Deductions section and perform the previous steps for each deduction.

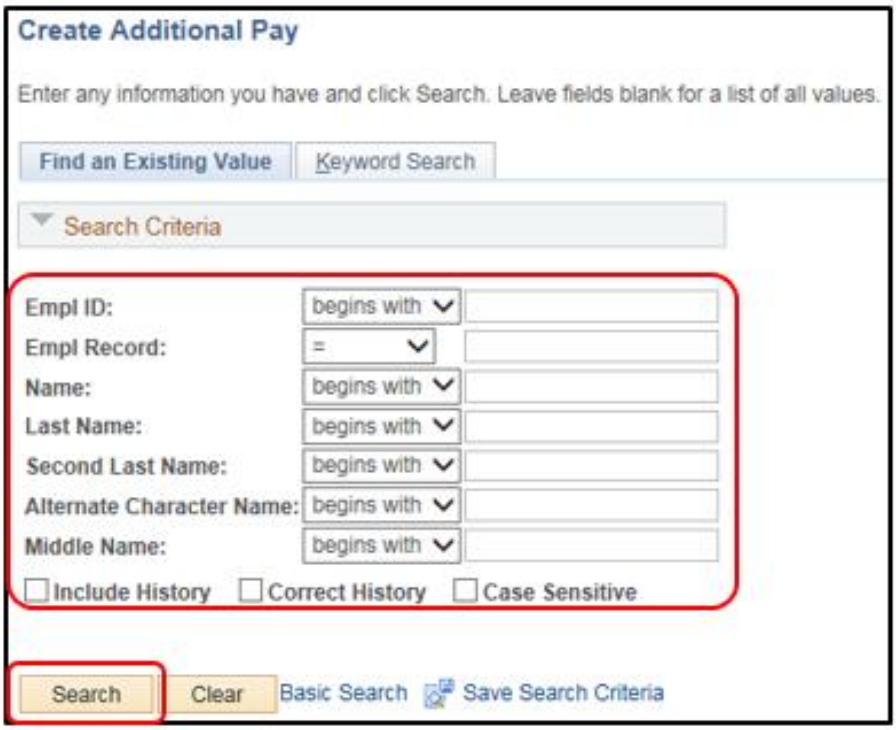


Payroll - End Additional Pay

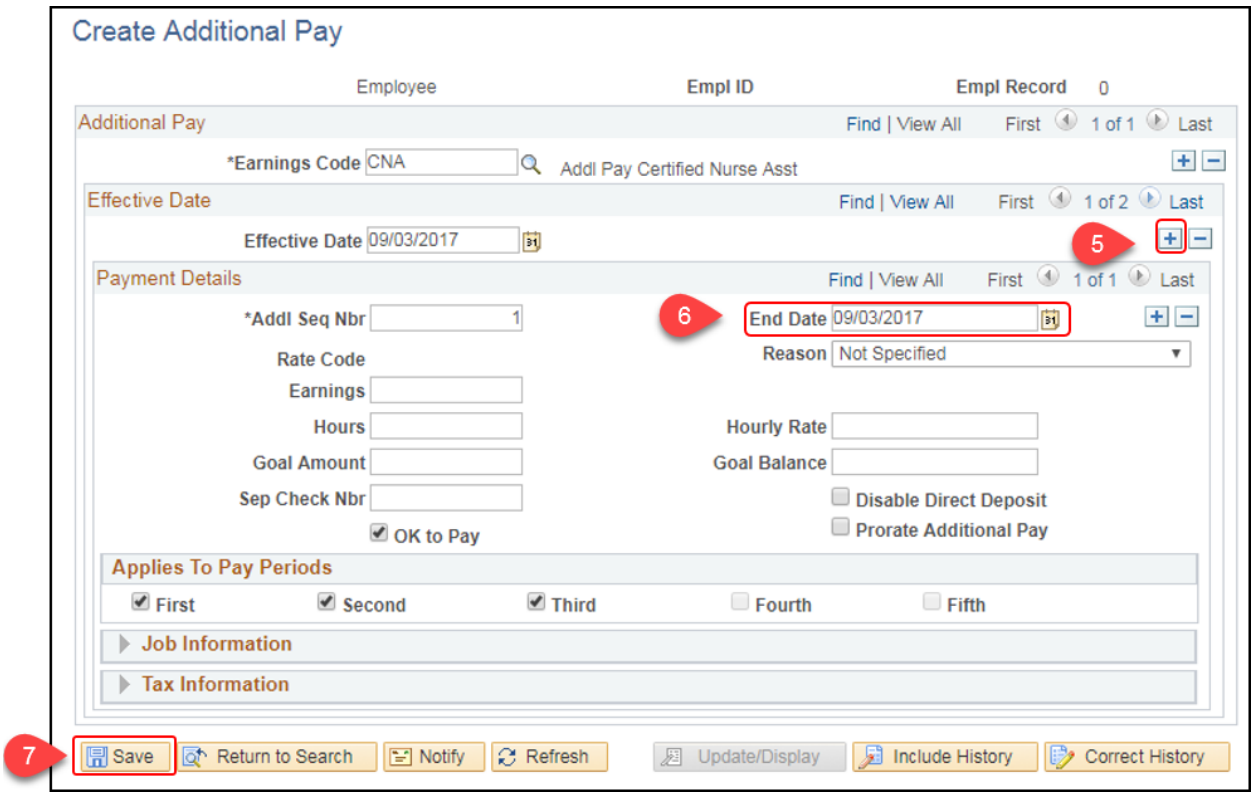
Role: Payroll Specialist Role

End all Additional Pay by setting the effective date and end date to the first day of the pay period following the termination.

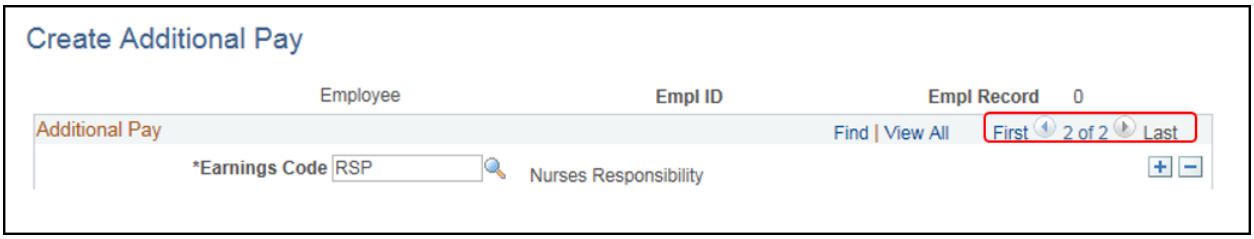
1. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay**
2. Enter the desired search criteria.
3. Click **Search**.



4. If multiple employees result, click the desired employee from the **Search Results** list.
5. Click **Add a Row (+)** in the Effective Date section.
6. Enter or select the **End Date** in the Payment Details section. This should be the first day of the pay period following the termination or retirement.
7. Click **Save**.



8. If the employee has multiple Additional Pay records, navigate through each by selecting the Previous or Next arrows in the Additional Pay section and perform the previous steps for each type of Add'l Pay.



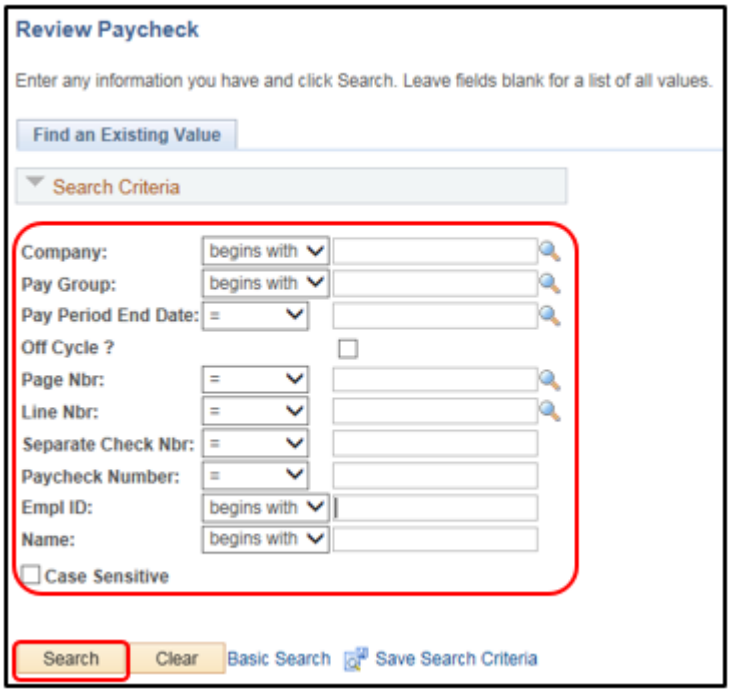
Payroll - Verify Pay For Exception Time Reporters

Role: Payroll Specialist Role

For exception time reporters, once the last payroll has been calculated, verify that time entry for the last pay period was completed correctly and that the appropriate amount due (no overpayment of days not worked) is displayed on the employee's final check.

1. Navigation: **Main Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck**
2. Enter the desired search criteria.

3. Click **Search**.



4. If multiple checks result, click the desired check from the Search Results list.
5. In the Paycheck Earnings tab, review the Hours listed in the Other Earnings section to ensure they are accurate for the employee's actual hours worked in their last pay period.

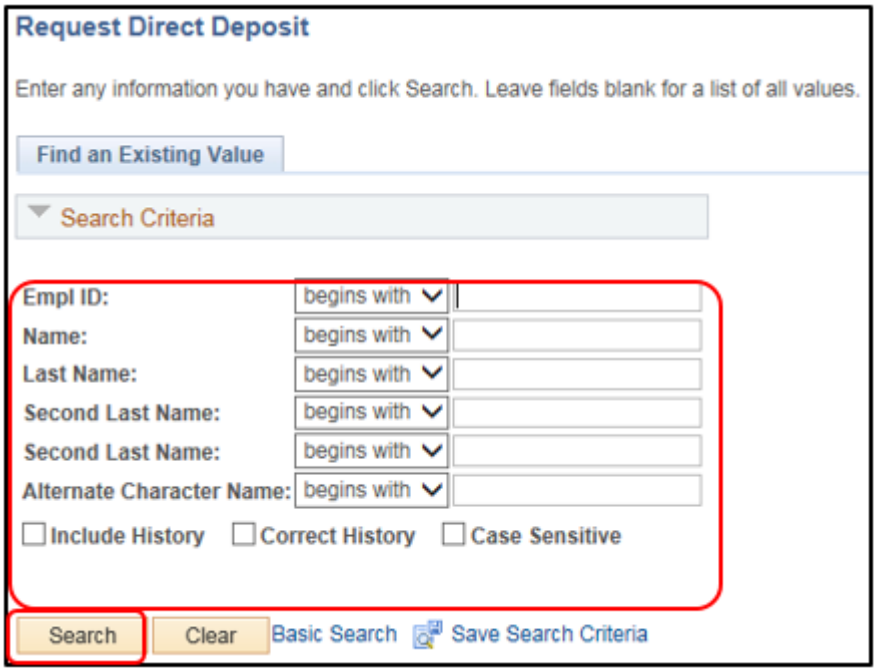


6. If hours are incorrect, review and adjust the timesheet appropriately. (See the Adjust Timesheet Entries section of this document)

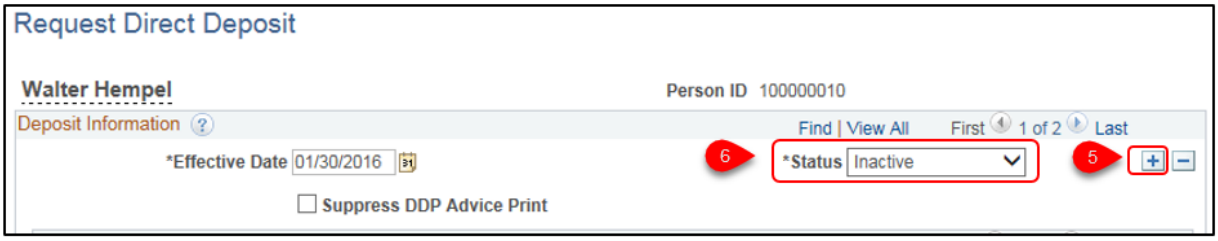
Payroll – Inactivate Direct Deposit (After Last Payroll Has Been Confirmed By Central Payroll)

Role: Agency Payroll Specialist

1. Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**
2. Enter the desired search criteria.
3. Click **Search**.



4. If multiple employees result, click the desired employee from the **Search Results** list.
5. Click **Add a Row (+)**
6. Select Inactive from the **Status** list.



7. Click **Save**.

Payroll - Request Garnishment Suspension

Role: Payroll Specialist Role

After the last payroll, notify the Garnishment Team to suspend any active garnishments.

Benefits - Termination/Retirement Event

Role: Agency Benefits Specialist

When a termination/retirement/completion action is entered on an employee's job record, a termination-related Benefits Event row is added to the BAS Activity Table immediately after the termination is entered on the Job Data Row. Overnight, the termination-related benefits event will be created.

The following Action/Action Reasons create a benefit event for termination or retirement:

Action Description *(Code)*	Reason Description *(Code)*	BAS Action
Completion *(COM)*	**Completion** *(COM)*	TER
Retirement *(RET)*	**Disability Retirement** *(DIS)*	RET
Retirement *(RET)*	**In Lieu of Layoff** *(ILL)*	TWB
Retirement *(RET)*	**Retirement** *(RET)*	RET
Terminated with Benefits *(TWB)*	**Appeal** *(APP)*	TWB
Terminated with Benefits *(TWB)*	**Layoff** *(LAY)*	TWB
Terminated with Benefits *(TWB)*	**Terminated with Benefits** *(TWB)*	TWB
Termination *(TER)*	**Accepted Offer – Did Not Start** *(DNS)*	TER
Termination *(TER)*	**Death** *(DEA)*	DEA
Termination *(TER)*	**Discharge – Probation** *(DPR)*	TER
Termination *(TER)*	**End Benefits** *(EBN)*	TER

Action Description *(Code)*	Reason Description *(Code)*	BAS Action
Termination *(TER)*	**End LTE Appointment** *(ELA)*	TER
Termination *(TER)*	**End project appointment** *(EPA)*	TER
Termination *(TER)*	**Job Abandonment** *(JOB)*	TER
Termination *(TER)*	**Misconduct** *(CON)*	TER
Termination *(TER)*	**Other work private** *(OWP)*	TER
Termination *(TER)*	**Release LTE** *(RLT)*	TER
Termination *(TER)*	**Resignation** *(RES)*	TER
Termination *(TER)*	**Staff Reduction** *(RES)*	TER
Termination *(TER)*	**Transfer to Affiliate** *(TAF)*	TRA
Termination *(TER)*	**Unable to Perform Job Duties** *(PJD)*	TER
Termination *(TER)*	**Unsatisfactory Performance** *(UNS)*	TER

Finalize the Benefits Event

After the termination Benefits Event is finalized, PeopleSoft terminates the employee's benefits. If the event is not finalized by the agency Benefits Specialist, the event will auto-finalize after five calendar days.

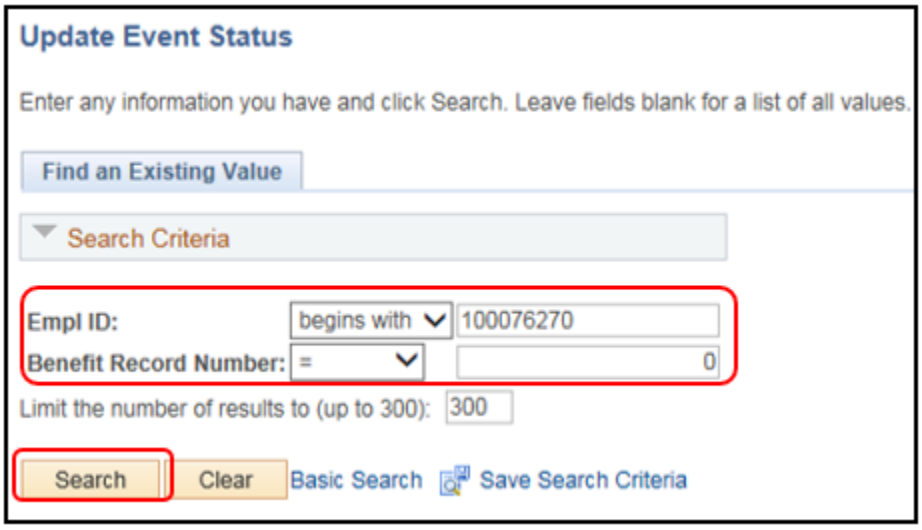
Note: It is highly recommended that the event is finalized the day after the termination/retirement is entered in job data. No benefit terminations will be sent to ETF and benefit vendors until the termination is finalized. Also, the retro benefit process will not refund any premiums already paid for future coverage until the termination event is finalized.

IMPORTANT REMINDERS:

1. Do NOT use the POTT process to request insurance refunds or deduction overrides of benefits if the termination benefit event is not finalized. The finalization of the termination event will stop deductions correctly and the retro benefits process will refund deductions automatically (see life insurance exception on following page).
2. Do NOT use an ADM or other event to manipulate the benefit termination date – the termination event will set the coverage end date correctly.
3. If an employee is enrolled in an HSA and will not be on payroll to receive the full employer contribution for the last coverage month, you will need to request a POTT to override the HSA employer contribution to make the employee whole.

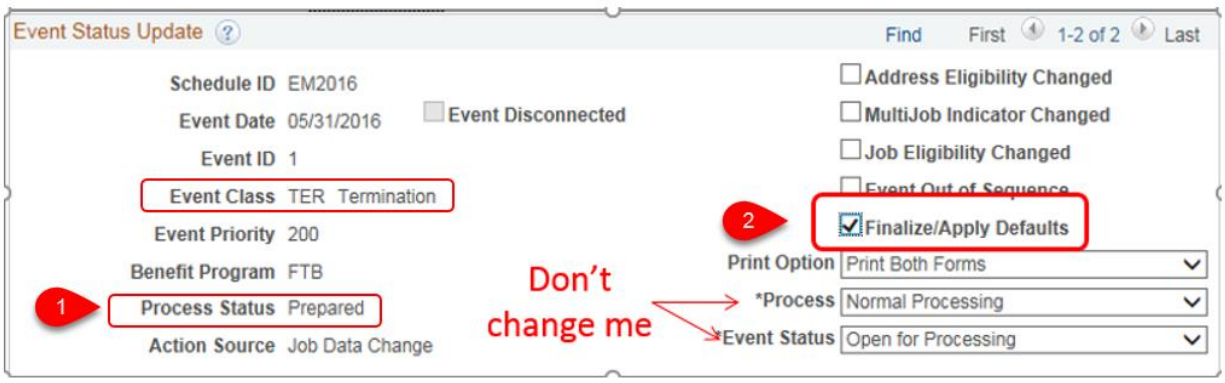
STEP 1: Navigate to the update Event Status page and locate the affected employee.

1. Navigation: **Main Menu > Benefits > Manage Automated Enrollment > Events > Update Event Status**
2. Enter the employee's **Empl ID**
3. Click **Search**.



STEP 2: Finalize the Benefits Event.

1. Verify the Termination event's Event Status displays Open for Processing. Process Status should be Prepared.
2. Select the Finalize/Apply Defaults option.
3. Click **Save**.



- An overnight Benefits Administration process will finalize the event, add termination rows to the benefit plans, and send the termination information to the benefit plan vendor via interface. All benefits end at the end of the month of termination.
- As long as the benefits termination event is finalized prior to payroll confirm, benefit deductions will stop based on the employee's termination date.
- If the employee overpaid for benefit because the termination event was not finalized timely, retro benefits will generate the appropriate refund. In order for the refund to appear on the employee's final check, the termination must be finalized prior to Tuesday morning of payroll calc week – this is when retro benefits is loaded to the paycheck.

   if the deadline is missed, retro benefits will still generate the refund but it will be payable in the following pay period. If the employee already terminated employment and is not scheduled to receive another paycheck, the retro benefit process will automatically create a paycheck for the employee to refund the amount due to the employee.

Special Note on State Group Life Insurance – State Group Life Insurance is paid one month in advance, but PeopleSoft registers it as paying for current month. This means that the employee is often due a refund of one half to a whole month of life insurance premiums at termination (depending on the timing of the termination).

Central Benefits does the following to generate any life insurance refund due (or stop deductions from coming out):

- Query for life insurance termination rows on the Enroll in Benefits pages (the termination event must be finalized in order for the life insurance termination row to be on these pages)
  - Central Benefits will look for termination rows that are up to 90 days old. If you retroactively enter a job termination that terminates life insurance more than 90 days in the past, you will need to create an SSO ticket to request any life insurance refund due.

- Back up the deduction begin date on the termination row by one month (to reflect the fact that we pay for life insurance one month in advance)
- Use retro benefits to generate any life insurance refund owed and/or stop the deduction from ever coming out in the first place (depends on timing)

If an employee should NOT receive a refund for State Group Life Insurance for any reason (ex. employee recently started and is not owed a refund), create an SSO ticket to stop a refund from generating.

Agencies should not use the Pay One Time Transaction (POTT) process to request life insurance refunds due to termination.

Reconcile the Employee's Benefit Deductions



Recommendation: For all terminating employees, run the query WI_PY_DED_HIST on them to verify that all deductions have been paid over the course of their employment. If they need to pay additional for missed deductions, you can do this through POTT. Additionally, run the query WI_WRS_XXXX_TRANS (where XXXX is the current year) to ensure that the employee has paid all contributions on their WRS eligible earnings.

If any payroll adjustments are made after they terminate, submit an SSO ticket so the additional WRS eligible earnings and contributions can be reported to ETF prior to the WRS Annual Reconciliation.

You should see if the employee has any outstanding arrears (Navigation: **Main Men>Payroll for North America>Periodic Payroll Events USA>Balance Reviews>Arrears)**. You may need these zeroed out or increased, depending on the reconciliation you did on their benefit deductions.

Benefits - Terminations Processed In A Month That Has A "C: Pa Period or Employees Who Terminate Prior To Paying For A Full Month Of Coverage

Role: Agency Benefits Specialist



Pay Period "C" happens a few times a year.

Benefits end at the end of the month in the month in which an employee terminates and benefit deductions are taken from the first two checks payable each month. If a

terminating employee will not be receiving earnings or any other type of pay for the pay period in which the second half of benefit deductions are taken, the agency will need to request a POTT for the 2nd half of the premium.

Example: Termination is effective April 2 or April 3, 2016 (last day worked of April 1 or April 2), their benefits will end at the end of the month of April but their last paycheck will be in PP8 which will pay for the 1st half of April premiums only. In order to collect the full premium for April coverage, you will need to request POTTs for the 2nd half of the April premium for PP8.

When requesting the POTT, you will need to include the following:

- Health insurance – employee and employer (non-taxable) contribution. If the person is subject to imputed income, you will also need to include the taxable portion of the premium
- ICI – employee and employer contribution
- Supplemental Benefits – employee contribution
- FSA – work with employee to determine if final contribution should be increased
- HSA – employee is eligible for full employer contribution towards HSA for final month of coverage - Submit POTT to provide 2nd half of employer contribution towards HSA for the final coverage month.

POTT requests will NOT be processed unless there is a termination on the job record. You also need to add comments or attach documentation to all POTT requests for benefits. They will NOT be processed without comments or documentation.


If the employee receives a check for any earnings (including a leave payout) AFTER their "final" check and it is payable for the pay period in which the 2nd half of benefit deductions for that month would otherwise be payable, benefit deductions WILL come out of that check and you won't need to do a POTT to collect the premiums in advance.

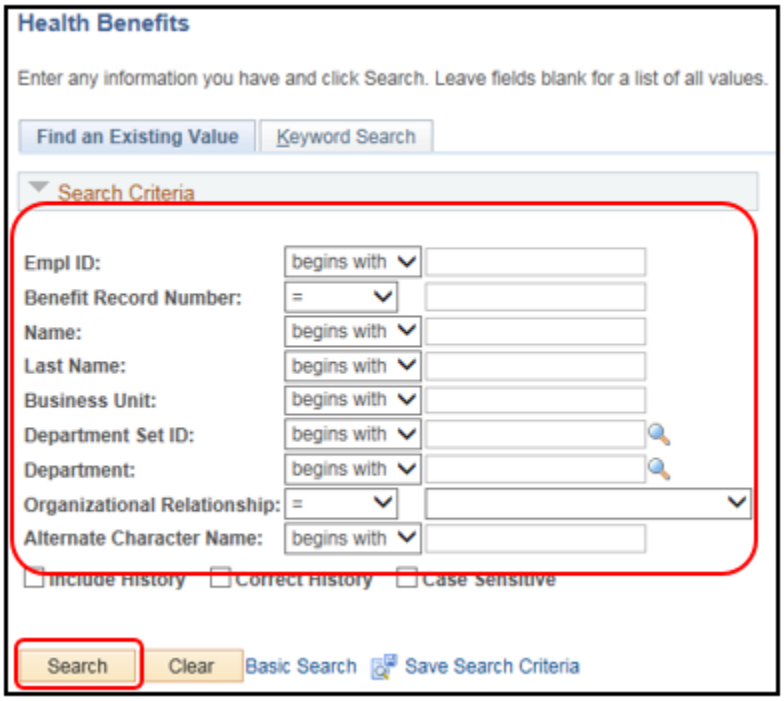
Example: Employee's last day worked is 4-2-16 so the final regular paycheck is for PP8, which pays for the first half of April premiums. The agency is going to generate a leave payout check in PP9. The second half of April premiums WILL come out of the check generated for PP9 and the agency would not need to request a POTT in this situation.

Benefits - Verify Benefits Termination

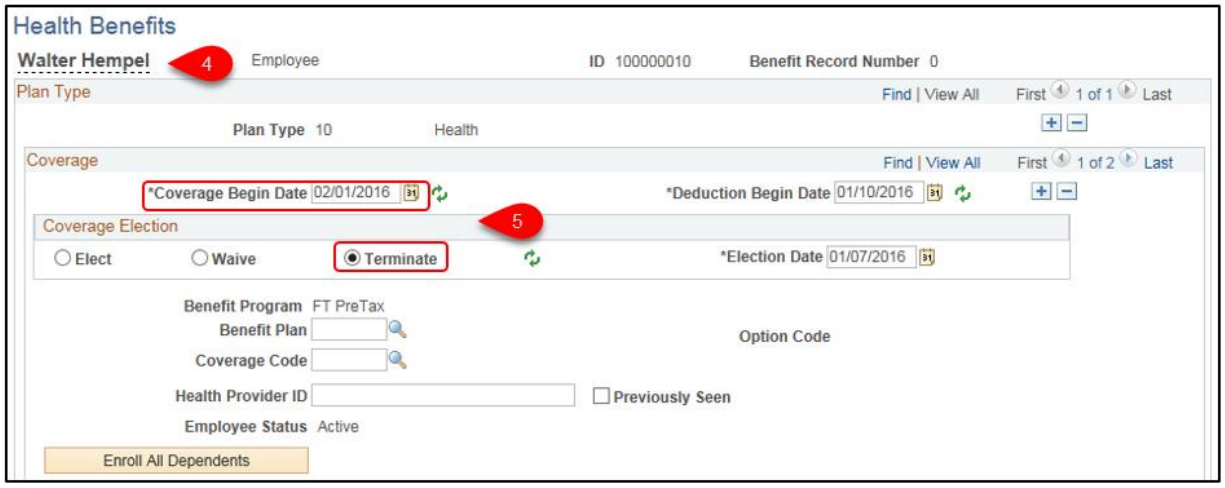
Role: Agency Benefits Specialist

STEP 1: Verify Health Benefits have terminated.

1. Navigation: **Main Menu > Benefits > Enroll in Benefits > Health Benefits.**
2. Enter the desired search criteria.
3. Click **Search**.



4. If multiple employees result, click the desired employee from the Search Results list.
5. In the Coverage Election section, you will see that the coverage election is set to **Terminate** and the **Coverage Begin Date** will be the 1st of the month after the employee's termination date. This is the first day that coverage is officially terminated.
    - For example, if someone terminated on 2-15-16, insurance benefits will be terminated effective 3-1-16.



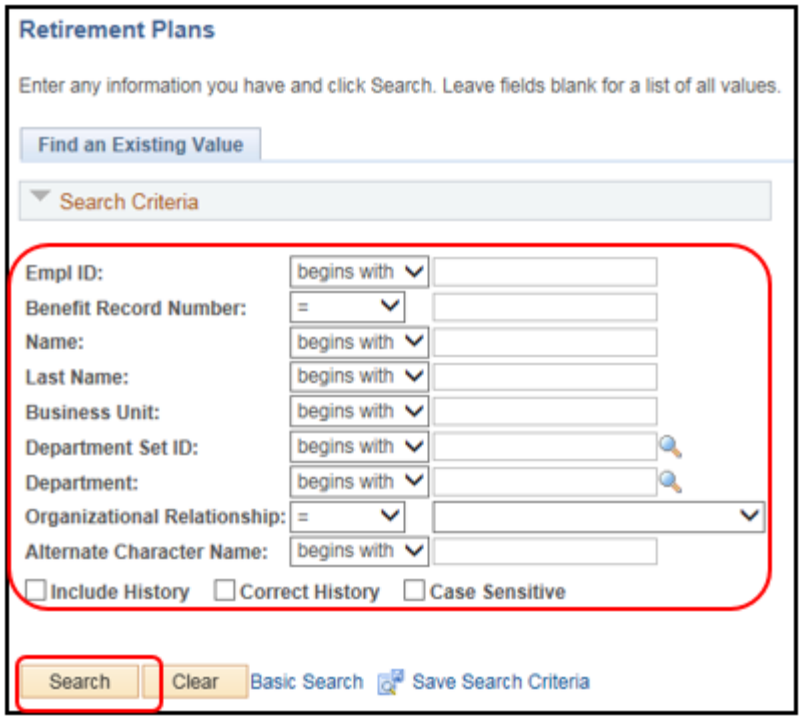
6. If the employee has multiple health benefits navigate through all health benefits by selecting the Previous or Next arrows in the Plan Type section and perform the previous verification steps for each plan type.

STEP 2: Verify all other benefits have terminated.
Use the same verification steps just applied to health benefits for all other applicable benefits.

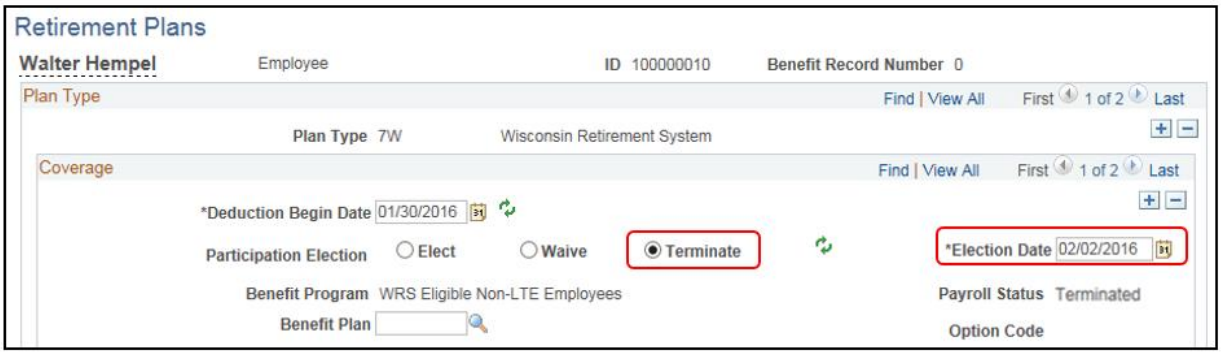
- Life, AD&D – Navigation: **Main Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits.**
- Disability – Navigation: **Main Menu > Benefits > Enroll in Benefits > Disability Benefits**

STEP 3: Verify Retirement (WRS) elections have terminated.

1. Navigation: **Main Menu > Benefits > Enroll in Benefits > Retirement Plans**
2. Enter the desired search criteria.
3. Click **Search**.



4. If multiple employees result, click the desired employee from the Search Results list.
5. Verify the Participation Election selection is Terminate.
    - In order to collect the employee's last WRS contribution from the final paycheck, the termination of the WRS benefit plan is the first day of the first pay period following the employee's termination date. This is NOT the WRS end date that is submitted to ETF. The termination date submitted to ETF is based on termination date on the employee's job record.



Checklist: Termination/Retirement

 Download and print this checklist if necessary by clicking on the icon. Or, review the checklist below.

Name: _____ Empl ID:

_____

Termination/Retirement Effective Date: _____

☐ **UPDATE JOB DATA**

Role: *Agency HR Specialist*

Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data**
Enter Termination/Retirement/Completion Action/Action Reason job row.

☐ **ADJUST AND INACTIVATE TIME**

Role: *Time and Labor Specialist*

☐ ***Identify Time Reporters with Time after Termination/Retirement Date***

Navigation: **Main Menu** > **Reporting Tools** > **Query** > **Query Manager**
Query: **WI_TERM_W_TIME**

☐ ***Adjust Timesheet Entries***

Navigation: **Main Menu** > **Manager Self Service** > **Report Time** > **Timesheet**

☐ ***Update Time Reporter Data***

Navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Maintain Time Reporters**
Set Rule Element 1 and Rule Element 4 to CASH and in activate Time Reporter Data.

☐ ***Calculate Comp Time Payout Balances***

Navigation: **Main Menu** > **Time and Labor** > **View Time** > **Compensatory Time**
Calculate Comp Time payout and send to Payroll.

☐ **REVIEW AND ADJUST LEAVE BALANCES**

Role: *Agency Absence Specialist*

Navigation: **Main Menu** > **Global Payroll & Absence Mgmt** > **Payee Data** > **Maintain Absences** > **Review Absence Balances**

Identify leave balances and note whether to payout unused earned leave or if the leave is overdrawn.

DELETE FUTURE DATED LEAVE ENTRIES

Role: *Agency Absence Specialist*

- ***Search for and delete future dated entries***

  Navigation: **Main Menu** > **Global Payroll & Absence Mgmt** > **Payee Data** > **Maintain Absences** > **Absence Event**

- ***Verify no entries exist after termination***

Navigation: **Main Menu** > **Reporting Tools** > **Query** > **Query Manager**

Query: **WI_TERMINATED_WITH_ABSENCE**

PAYOUT/COLLECT LEAVE (IF APPLICABLE)

Role: *Agency Payroll Specialist*

Navigation: **Main Menu** > **State of Wisconsin (STAR)** > **Payroll** > **Process** > **Enter Payroll One Time Trans**

Process leave payouts or collections.

SET FINAL PAYCHECK TO PRINT

Role: *Agency Payroll Specialist*

Navigation: **Main Menu** > **Payroll for North America** > **Employee Pay Data USA** > **Request Direct Deposit**

END GENERAL DEDUCTIONS

Role: *Agency Payroll Specialist*

Navigation: **Main Menu** > **Payroll for North America** > **Employee Pay Data USA** > **Deductions** > **Create General Deductions**

END ADDITIONAL PAY

Role: *Agency Payroll Specialist*

Navigation: **Main Menu** > **Payroll for North America** > **Employee Pay Data USA** > **Create Additional Pay**

VERIFY PAY FOR EXCEPTION TIME REPORTERS

Role: *Agency Payroll Specialist*

Navigation: **Main Menu** > **Payroll for North America** >**Payroll Processing USA** > **Produce Payroll** > **Review Paycheck**

Verify pay calculated appropriately for time worked in last pay period.

INACTIVATE DIRECT DEPOSIT (AFTER LAST PAYROLL CONFIRMED BY CP)

Role: *Agency Payroll Specialist*

Navigation: **Main Menu** > **Payroll for North America** >**Employee Pay Data USA** > **Request Direct Deposit**

REQUEST GARNISHMENT SUSPENSION

Role: *Agency Payroll Specialist*

Notify Garnishment team.

FINALIZE TERMINATION-RELATED BENEFITS EVENT

Role: *Agency Benefits Specialist*

Navigation: **Main Menu** > **Benefits** > **Manage Automated Enrollment** > **Events** > **Update Event Status**

Reminders:

- Any life insurance refund will be automatically generated if termination within the past 90 days
- Confirm that the employee is going to be on payroll long enough to collect the full month of premiums for the employee's last month of coverage – request POTTs as needed
- Reconcile benefit deductions and WRS contributions for the current year – request POTTS as needed
- Evaluate any arrears for the employee and if they need to be zeroed out or changed for the final payroll

VERIFY BENEFITS TERMINATION

Role: *Agency Benefits Specialist*

Health – Navigation: **Main Menu** > **Benefits** > **Enroll in Benefits** > **Health Benefits**.

Life, AD&D – Navigation: **Main Menu** > **Benefits** > **Enroll in Benefits** >**Life and AD/D Benefits**.

Disability – Navigation: **Main Menu** > **Benefits** > **Enroll in Benefits** > **Disability Benefits**

Retirement – Navigation: **Main Menu** > **Benefits** > **Enroll in Benefits** > **Retirement Plans**

SEND COBRA/CONTINUATION NOTICES AS APPLICABLE

Role: *Agency Benefits Specialist*

Resources

- Demotion, suspension, discharge and layoff: s. 230.34, Wis. Stats.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.4.2 Completion

Under Construction



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.5 Bi-Weekly Payroll Processing

State of Wisconsin
HCM User Guide

2.5.1 Bi-Weekly Payroll Calendar

Under Construction



Please refer to the BiWeekly Payroll Calendar STAR Job Aid for this topic.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.5.2 Payroll/Benefits Processing Calendar

Under Construction



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.6 Annual Processes

2.6.1 Open Enrollment

Under Construction



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
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2.6.2 Term/Sabbatical

Under Construction



Resources

- Earning Termination or Sabbatical Leave: s. 230.35(1p), Wis. Stats.; s. ER 18.02(5)(a), (b), and (bm), Wis. Adm. Code
- Annual Leave Options – Termination/Sabbatical Leave & Cash Payments: WHRH 704

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

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2.6.3 W-2

Under Construction



Please refer to the W-2/ W-2c Electronic Consent STAR Job Aid for this topic.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.6.4 ACA (1095)

Under Construction



Please refer to the 1095-C Electronic Consent STAR Job Aid for this topic.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.6.5 Crafts Workers Annual Leave/Pay Election

Crafts workers have the option to change their leave hours and compensation rate each year. In accordance with Wisconsin Compensation Plan Section A, 2.09, crafts workers in *pay schedule* 04 will be paid based according to the adjusted rate schedule published on the DPM website, based on the vacation schedule selected for the calendar year. The Building Trades Rate Booklet can be found at the following link:

http://doa.wi.gov/Divisions/Personnel-Management/Bureau-of-Compensation-and-Labor-Relations/Building-Trades-Rate-Booklet/

The leave rate changes for craft employees are effective January 1st of each year. Unlike the legacy system PeopleSoft will calculate the leave at the rate employee has selected. If the employee is not making a change, no changes need to be made in STAR PeopleSoft as the employee's wage rate will stay the same and leave will be calculated based on the absence eligibility group the employee was in for the prior year.

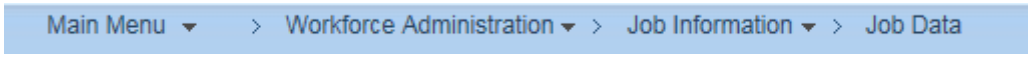
If you have a craft employee who elects to make a change for the new year, the following changes must be made prior to the beginning of processing for the pay period that includes January 1st:

Entering The Vacation/Pay Election

Role: Agency HR Specialist

STEP 1: Log into STARHCM.wi.gov using your IAM Username and Password

STEP 2: Navigate Main Menu > Workforce Administration > Job Information > Job Data



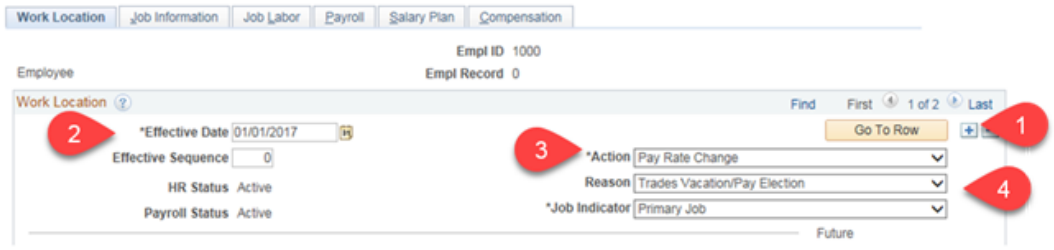


STEP 3: Search for the employee by entering their Empl ID or name, and click Search

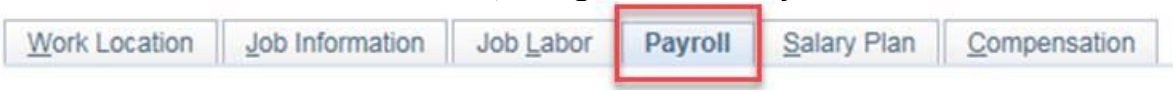
STEP 4:

1. On the Work Location tab, click the plus (+) button to add a row

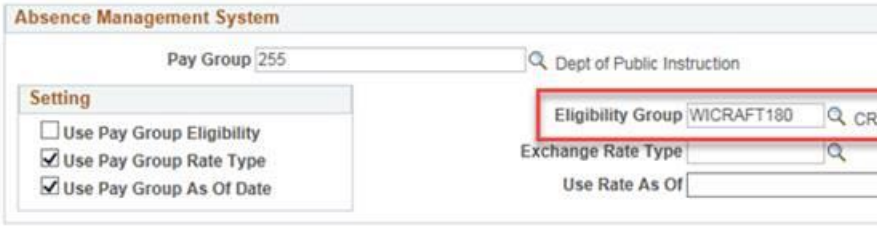
2. Update the effective date to 01/01/2017
3. Change the Action to "Pay Rate Change"
4. Change the Reason to "Trades Vacation/Pay Election"



STEP 5: To enter the vacation election, navigate to the **Payroll** tab



STEP 6: Select the applicable vacation election in the **Eligibility Group** field



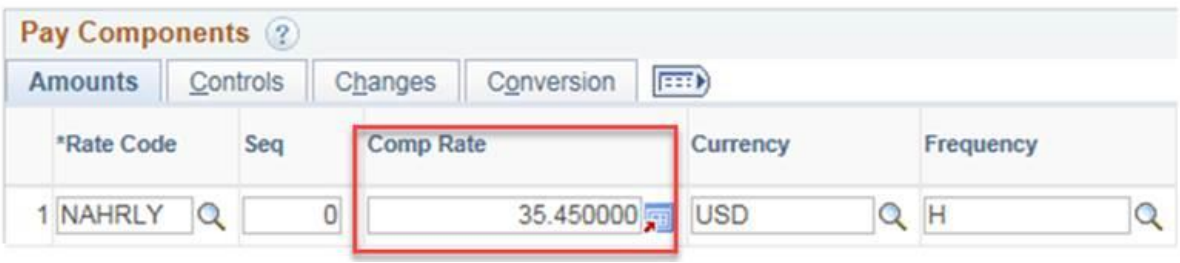
WICRAFT100	CRAFT Employees - 100 hrs
WICRAFT140	CRAFT Employees - 140 hrs
WICRAFT180	CRAFT Employees - 180 hrs

Options Include:

STEP 7: To enter the employee's wage rate, navigate to the **Compensation** tab



STEP 8: Enter the employee's hourly rate in the **Comp Rate** field. Write over the existing hourly rate.



STEP 9: Click **Calculate Compensation**



STEP 10: Click **Save** at the bottom of the page



If you should happen to click on the "Save" button prior to this last step, you need to submit a STAR support ticket to have the information corrected. Do not add a row.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

2.6.6 ICI Annual Update & ICI Deferred Enrollment

Under Construction



Please refer to the ICI Annual Update and the ICI Deferred Enrollment Job Aid (2017) – Reports 2 and 3 Job Aids for this topic.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3 Functional Areas

3.1 Absence Management

3.1.1 Bi-Weekly Payroll Processing

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This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.2 Benefits

3.2.1 Benefits

Under Construction



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3 Human Resources

3.3.1 Search For An Existing Person

3.3.1.1 Search For People

Purpose
Required Security Role
How To Search For People
Search Result Code Selection Guide

Purpose

The purpose for Search for People functionality is to allow agencies to find employee information for employees who are not in their row-level security. This information can be used to gather the information needed to perform a Request Job Change ("People Stealer"), and it can also be used to ensure employees are not duplicated within the system.

Required Security Role

The Person Search functionality requires the HR Roster security role.

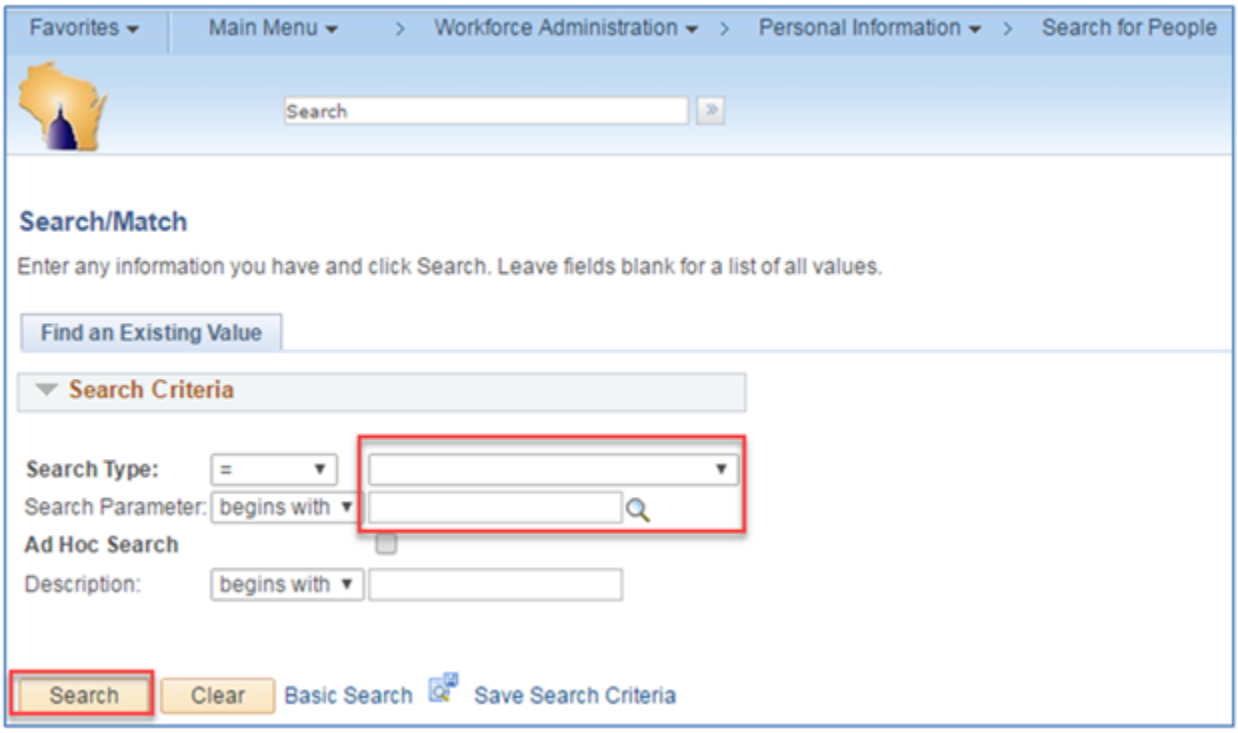


Legislature employees are not viewable through the Person Search functionality. If you think the employee is already in the system, but you are unable to view their details, please submit a Support Ticket. DPM will need to assist you with moving the Legislature employee into your row-level security.

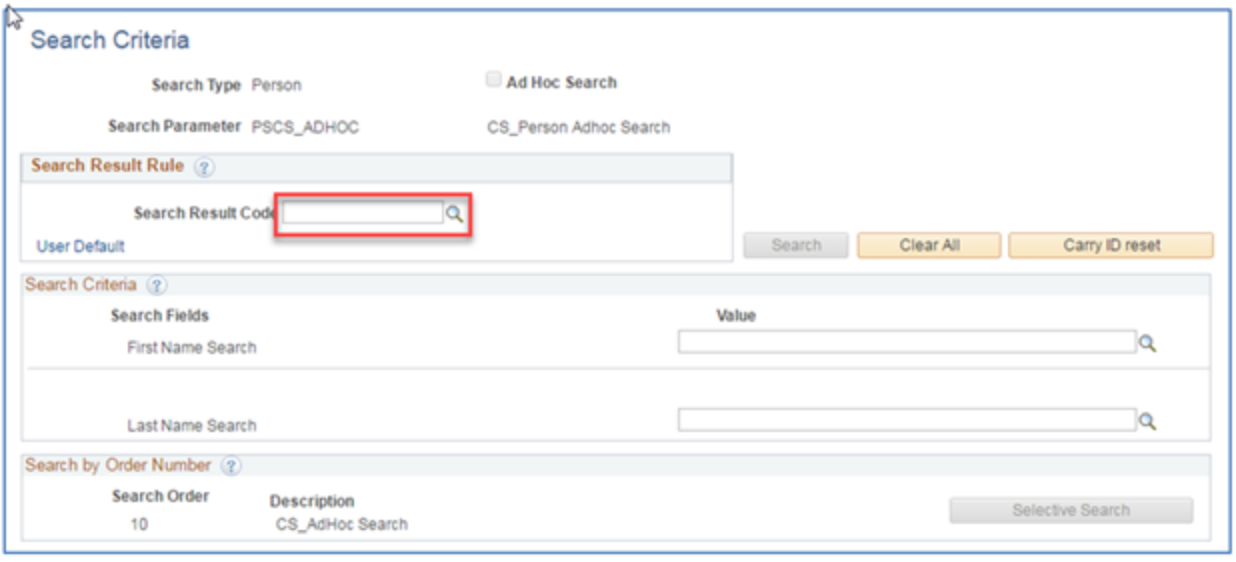
How To Search For People

Begin by navigating to the **Search for People** page.

Navigation: **Main Menu** > **Workforce Administration** >**Personal Information** > **Search for People**



1. Select Person from the Search Type list.
2. Enter or Select PSCS_ADHOC in the Search Parameter field.
3. Click Search



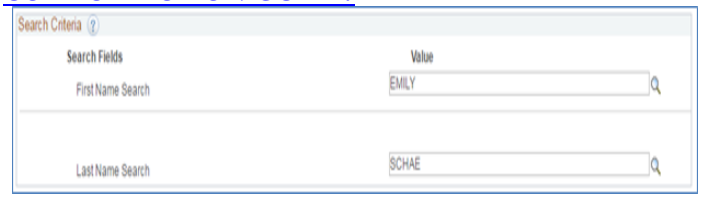
Enter the desired **Search Result Code**

- COMPENSATION
- JOB_DATA1
- JOB_DATA2
- JOB_DATA3

- PERSON_DATA
- PROFILE_DATA

-

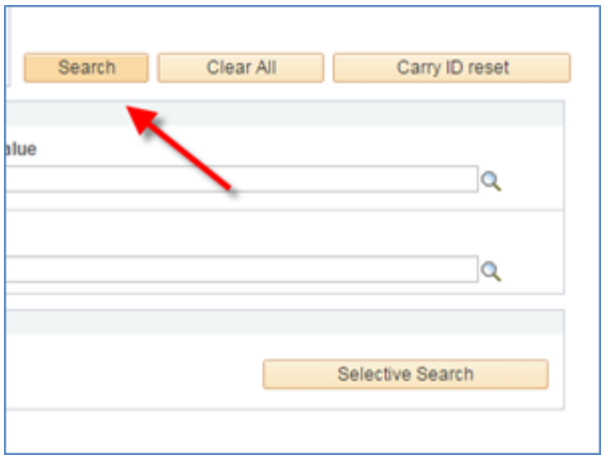
If using the Request Job Change functionality, JOB_DATA1 is the appropriate selection. For a list of fields associated with the Result Code, see SEARCH RESULT CODE SELECTION GUIDE.



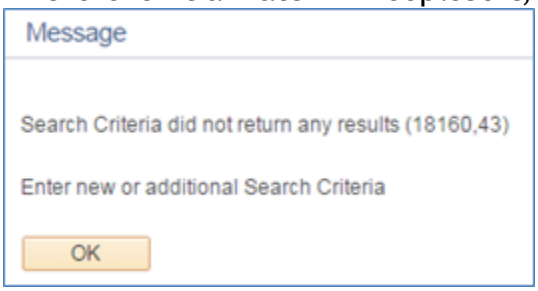
1. Enter the employee's first name, hit Tab on your keyboard
2. Enter the employee's last name, hit Tab on your keyboard

The name must be entered exactly how it is in PeopleSoft

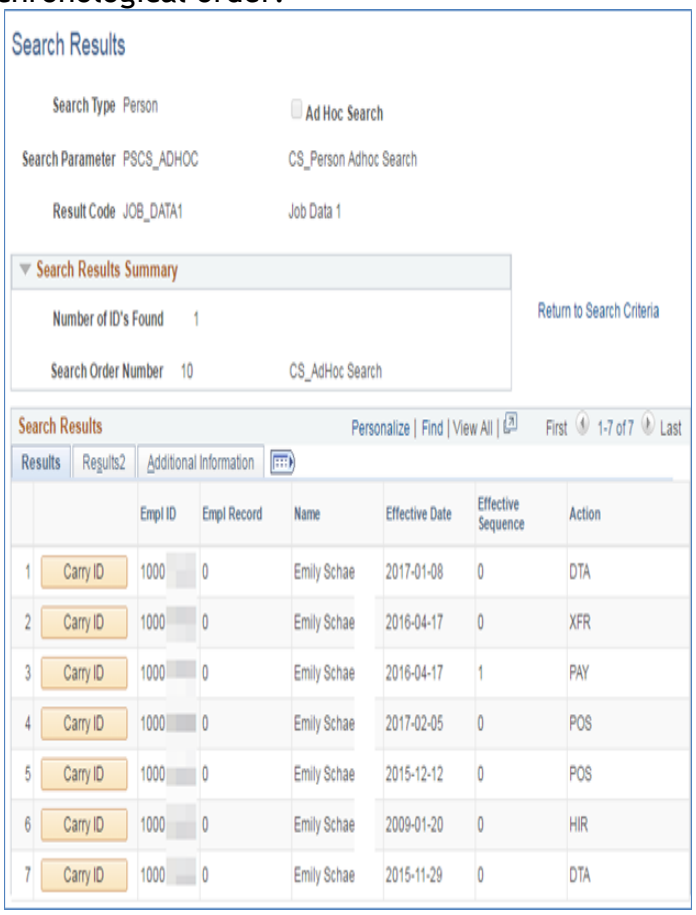
3. Click Search



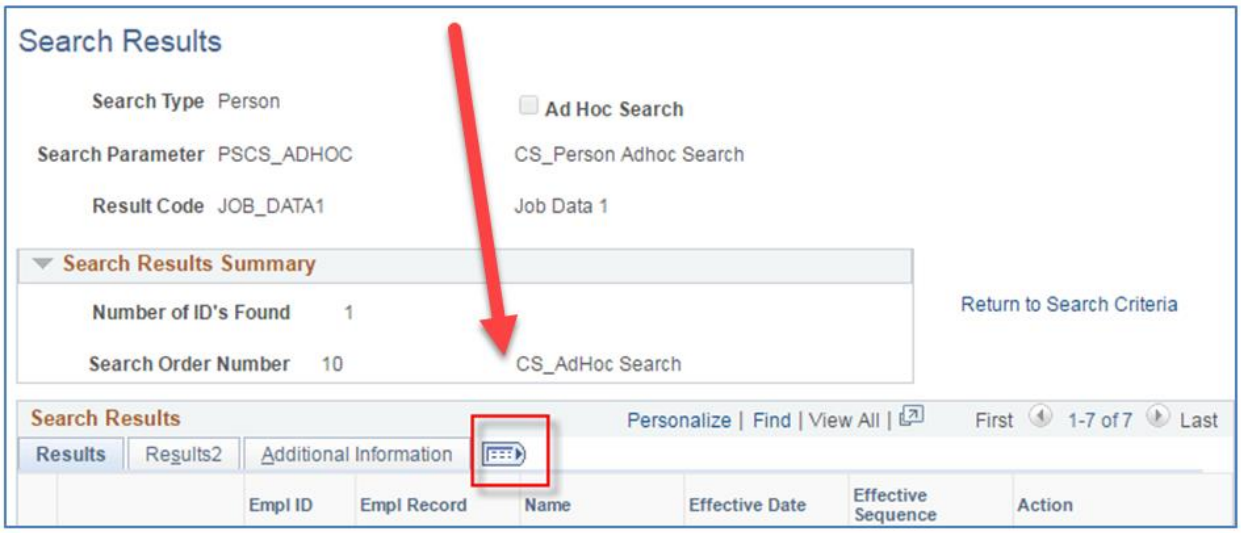
If there isn't a match in PeopleSoft, an error message will appear:



If there is a match, the Search Results display. The job data rows display in reverse-chronological order.

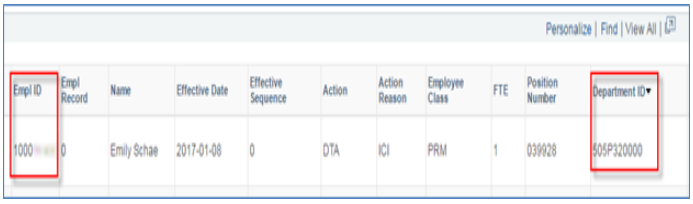


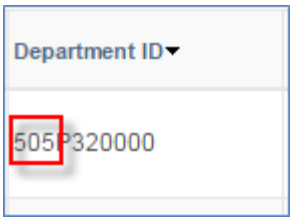
To display all columns, click the **show all columns icon.**

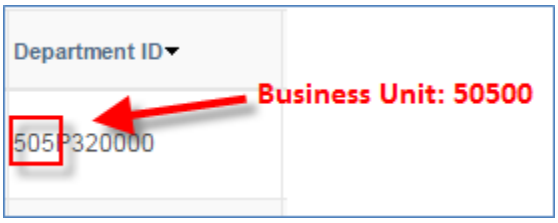


If you are using the Request Job Change functionality, be sure to document the **Employee ID**, the **Business Unit,** and the **Department ID**.

The Business Unit will not be a separate column. It is determined by using the first three digits of the Department ID, plus two zeros. DOT's business unit (39500) is the exception to this.







SEARCH RESULT CODE SELECTION GUIDE

This table is intended to assist you in deciding which Search Result Code to use in the Search for People process by displaying what data points are returned based on the Search Result Code used. Code definitions are also provided where appropriate.

Search Result Code: **COMPENSATION**

Returned Data Point	Code Definitions (if applicable)
Empl ID	
Employee Record Number	
Name	
EFFDT	Effective Date

Compensation Rate Code	AIRMEC – Aircraft Mechanic ATTYSM – Attorney Super/Manager BCEPHY – Board Cert Elig – Physician BCEPSY – Board Cert Elig – Psychiatrist BCPHYS – Board Cert – Physician BCPSYC – Board Cert – Psychiatrist BILING – Bilingual CONCOS – Construction Coord. Super CPAPOS – CPA-Post Certification CPAPRE – CPA Pre Certification CSUBAC – Clinical Subst Abuse Couns DENMAN – Dentist Management DENSUP – Dentist Supervisor DEPADM – SBO Deputy Admin DEBF DIGPRO – DOT Dignitary Prot Unit ENGIN1 – Engineer 1 ENGIN2 – Engineer 2 EPBAAD – SBO Exec Pol & Bud An – Adv EPBAEN – SBO Exec Pol & Bud An –Entry EPBAJR – SBO Exec Pol & Bud An – Jrny EPBASR – SBO Exec Pol & Bud An – Senr EPBMAN – SBO Exec Pol & Bud Manager FINEX1 – Financial Examiner – Level 1 FINEX2 – Financial Examiner – Level 2 FINEX3 – Financial Examiner – Level 3 FINEX4 – Financial Examiner – Level 4 FIREAR – Firearm GENAPP – General Appraiser, Certified	NAHRLY – Default NA Hourly ORALSU – Oral Surgery PHYMAN – Physician Management PHYSUP – Physician Supervisor PLUMBI – Plumbing PPDOAC – Power Plant – DOA PROSUP – Procurement Supervisor PRSPAD – Procurement Spec – Adv PRSPEC – Procurement Specialist PRSPOB – Procurement Spec – Obj PRSPSR – Procurement Spec – Senr PSYCHL – Psychologist PSYMAN – Psychiatric Management PSYSUP – Psychiatric Supervisor SACINT – Subs Abuse Couns Training SCIENC – Science Related SPAINC – Special Agent in Charge SUBABC – Substance Abuse Couns TCHR06 – Teachers – 06 Credits TCHR12 – Teachers – 12 Credits TCHR18 – Teachers – 18 Credits TCHR24 – Teachers – 24 Credits TCHR30 – Teachers – 30 Credits TCHR36 – Teachers – 36 Credits TCHR42 – Teachers –

Compensation Rate	

Search Result Code: **JOB_DATA_1**

Returned Data Point	Code Definitions (if applicable)	
Empl ID		
Empl Record		
Name		
Effective Date		
Effective Sequence		
Action	ADD – Add Contingent Worker COM – Completion DEM – *Demotion* DTA – Data Change HIR – Hire LOA – Unpaid Leave of Absence LOF – Layoff PAY – Pay Rate Change PLA – Leave of Absence	POI – Add Person of Interest POS – Position Change REC – Recall from Layoff REH – Rehire RET – Retirement RFL – Return from Leave TER – Terminated TWB – Terminated w/ Benefits XFR – *Transfer*
Action Reason		
Employee Class	AMC – Ameri Corps ELC – Elected NGD – National Guard - Emergency PAW – Patient Worker PRM – Permanent TRN – Trainee UNC – Unclassified BDM – Board Member CTR – Contractor	*LTE* – Limited Term Employee NON – Non-Employee OFW – Offender Worker PPR – Project – Permanent PRJ – Project-Project SNL – Seasonal ULE – Unclassified *LTE* VSC – VISTA Service Corps TBC – Teacher Board Certification
FTE		
Position Number		
Department ID		

Search Result Code: **JOB_DATA_2**

Returned Data Point	Code Definitions (if applicable)

Empl ID	
Empl Record	
Name	
Effective Date	
Effective Sequence	
Action	See JOB_DATA_1 listing.
Action Reason	
Job Code	
Job Code Description	
Salary Plan	
Salary Grade	

Search Result Code: **JOB_DATA_3**

Returned Data Point	Code Definitions (if applicable)
Empl ID	
Employee Record Number	
Name	
Company Seniority Date	
Benefits Service Date	

Search Result Code: **PERSON_DATA**

Returned Data Point	Code Definitions (if applicable)
Empl ID	
Name	
Date of Birth	
Ethnicity	
Gender	
Veteran Status	X – Not a Veteran 1 – Not Indicated 4 – Veteran

Search Result Code: **PROFILE_DATA**

Returned Data Point	Code Definitions (if applicable)

Probation Type	00 – Not on Probation 01 – Original 02 – Promotional 03 – Permissive 04 – Original *Career Executive*	05 – Promotional Career Executive 06 – Permissive Career Executive 07 – Trainee 08 – Proj Appt. – Six Month Increase Period
At-Risk Expiration Date		
Date of Layoff		
Restoration Expiration Date		
Date Employee Restored		
Disability Type	A – Vet with less than 30% service connected disability B – Vet with at least 30% but less than 70% service connected disability C – Vet with a 70% or greater service connected disability D – Spouse of a disabled vet whose service connected disability is at least 70% E – Disabled spouse of a disabled vet whose service connected disability is at least 70% F – Severely disabled spouse of a disabled vet whose service connected disability is at least 70% G – Unremarried spouse of a vet killed in action or a vet who died of a service connected disability H – disabled unremarried spouse of a vet KIA or a vet who died of a service connected disability I – Severely disabled unremarried spouse of a vet KIA or a vet who died of a service disability	

This page last updated in Release Number: 17-01
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3.3.1.2 Personnel Roster

See the Appendix Chapter for the State Employee Roster Query.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3.2 Maintain Employee Information

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

3.3.2.1 Managing Employee Names

Updating An Employee Name (Optional)
Entering Additional Employee Names
Updating Additional Employee Names (Optional)

Updating An Employee Name (Optional)

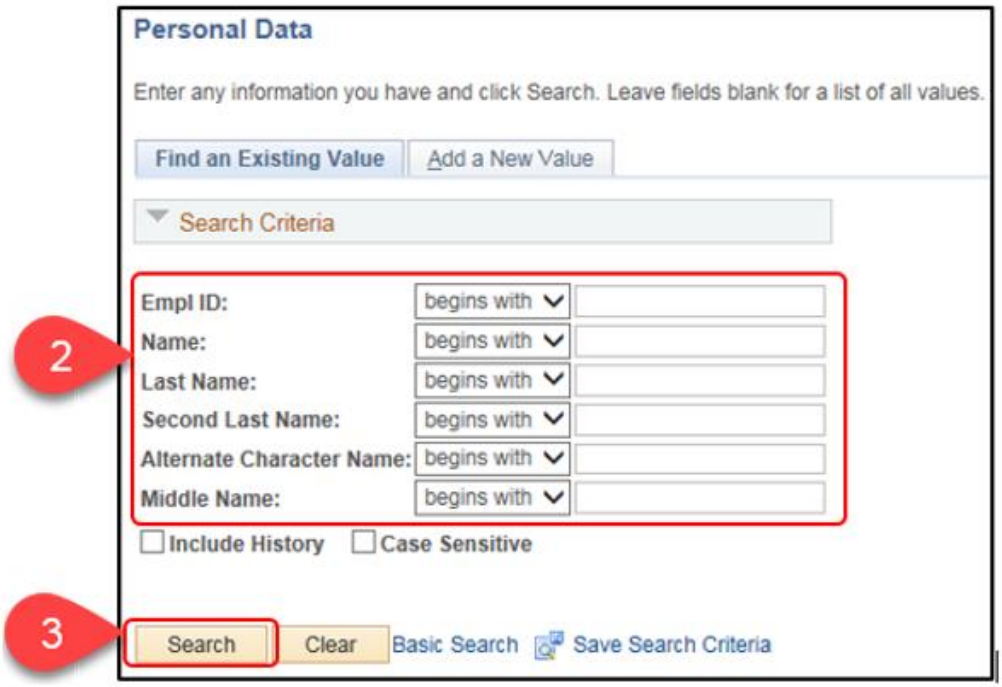
Role: Agency HR Specialist

The name entered in the Personal Data pages must be the employee's LEGAL name.

If a name was entered into PeopleSoft incorrectly, submit a STAR support ticket to have it corrected

STEP 1: Navigate to the Personal Data pages and locate the desired employee

1. Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person**
2. Enter the desired search criteria.
3. Click Search.



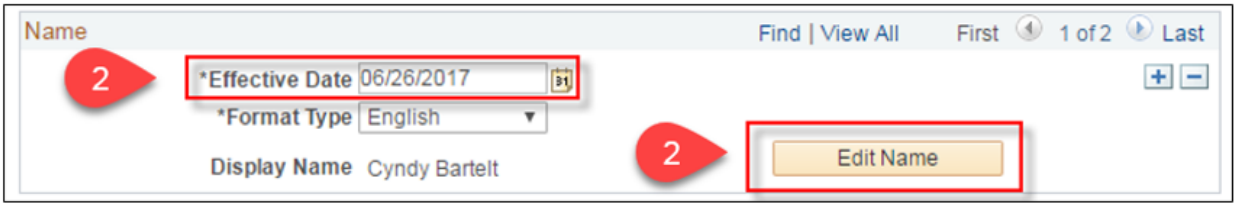
4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Update the name on the Biographical Details tab.

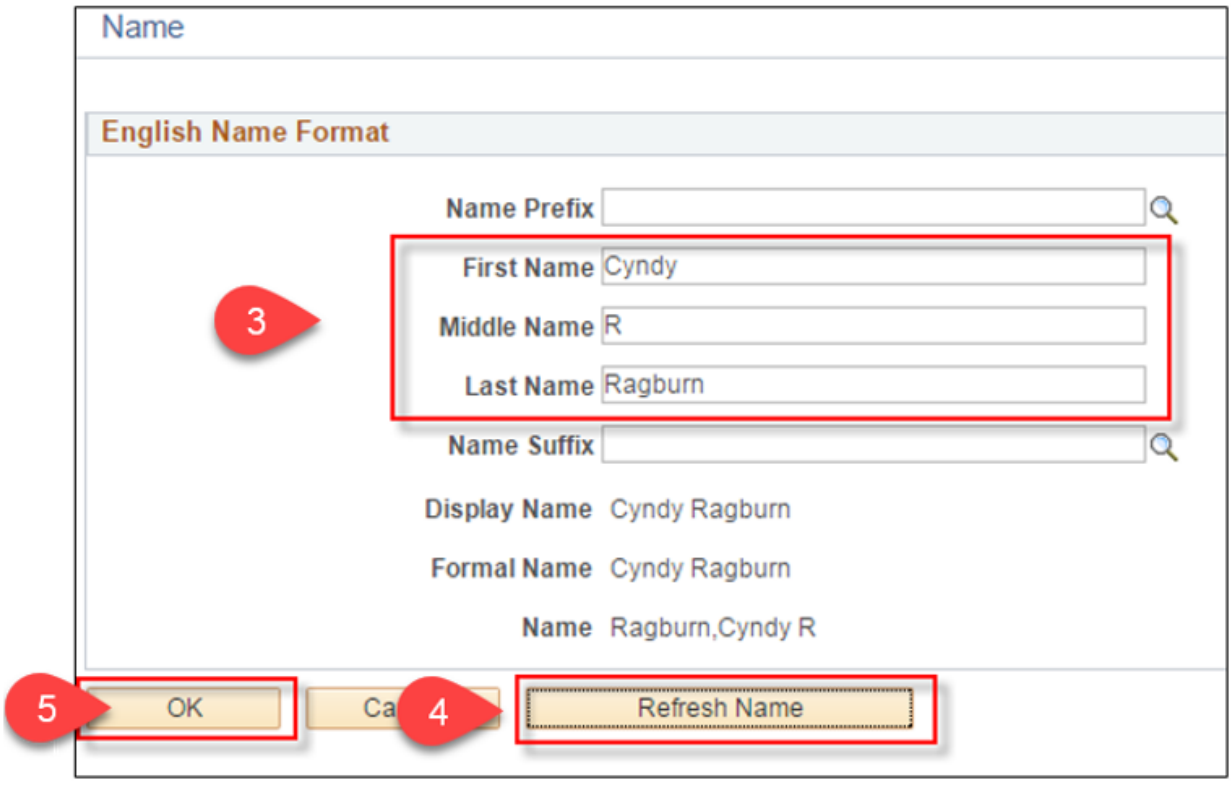
1. Click Add a Row (+) in the Name section.



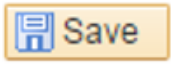
2. Enter the Effective Date and Click Edit Name.



3. Make all necessary updates to the name fields.
4. Click Refresh Name to display the new name formats and verify correct entry.
5. Click OK.



6. Click Save.



RESULT: The employee's updated names displays in the Name section.

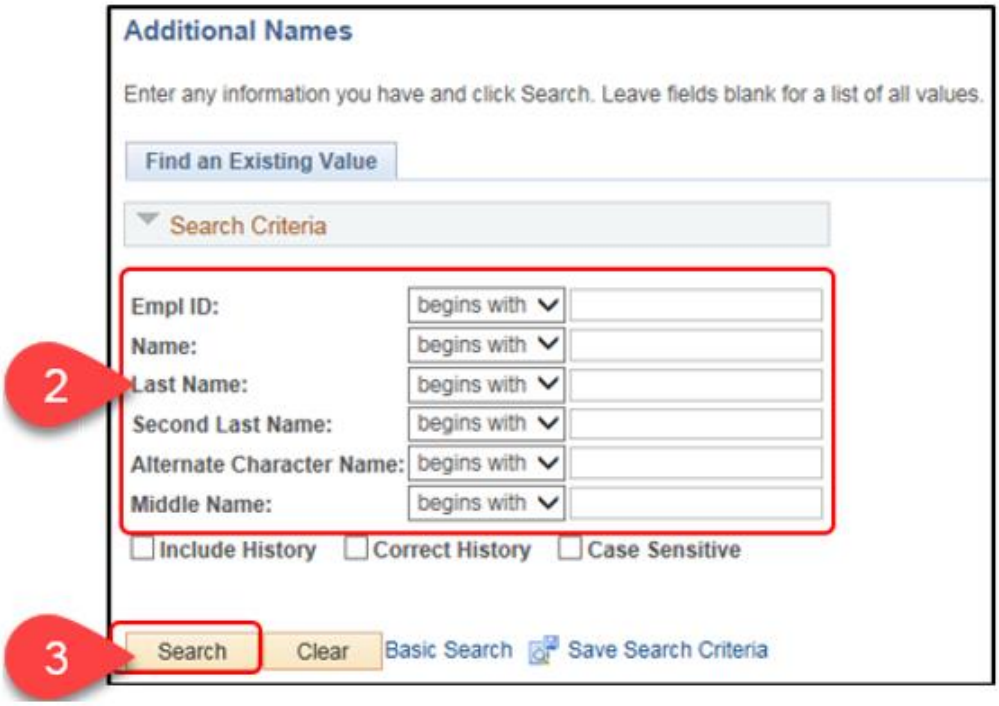
Entering Additional Employee Names

Role: Agency HR Specialist

The Additional Names functionality can be used track other name types such as preferred or maiden name for an employee. The primary name on the page populates from the employee's Personal Data.

STEP 1: Navigate to the Additional Names page and locate the desired employee.

1. Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names**
2. Enter the desired search criteria.
3. Click Search.



4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Add additional name types and details.

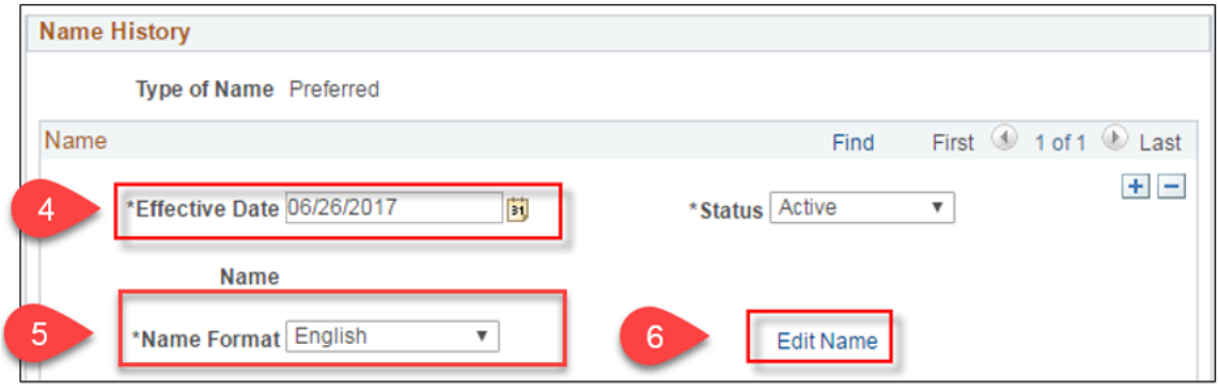
1. Click Add a Row (+).



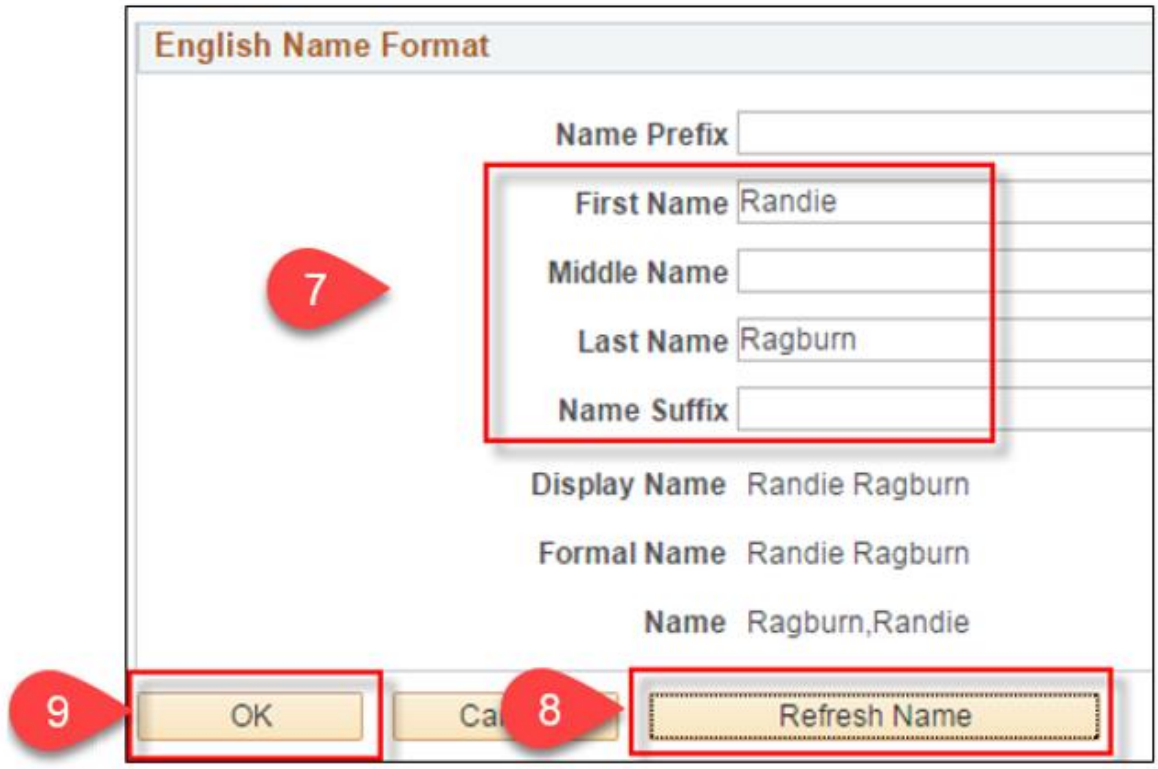
2. Select the desired Type of Name from the list.
3. Click Add Name Data.



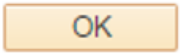
4. Enter or select the desired Effective Date.
5. Select English for Name Format.
6. Click Edit Name.



7. Enter the desired name field information for the selected name type.
8. Click Refresh Name to display the new name formats and verify correct entry.
9. Click OK.



10. Click OK again



11. Click Save

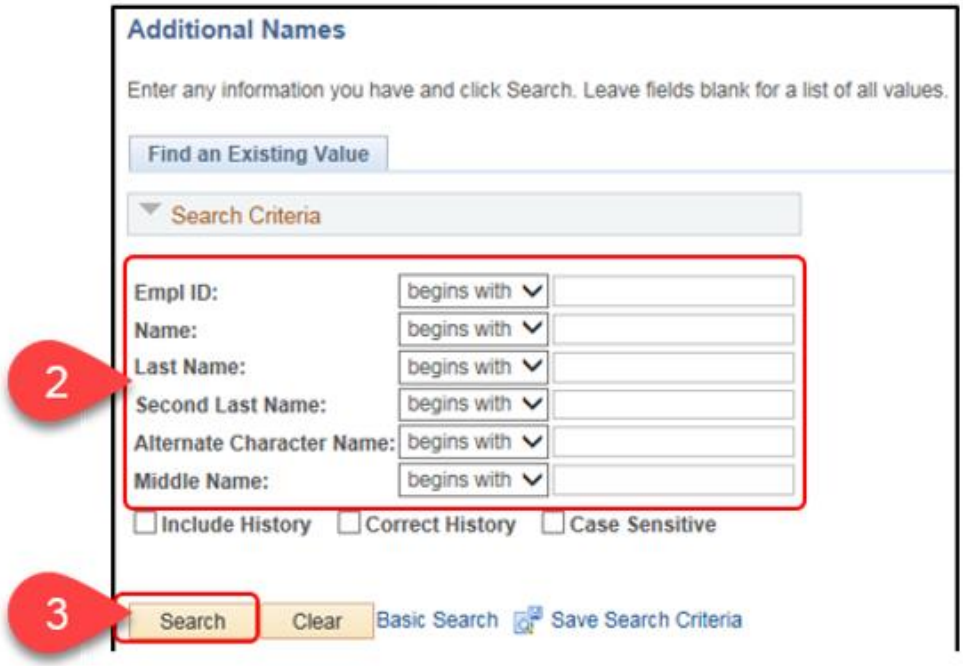


Updating Additional Employee Names (Optional)

Role: Agency HR Specialist

STEP 1: Navigate to the Additional Names page and locate the desired employee

1. Navigation: **Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names**
2. Enter the desired search criteria.
3. Click Search.



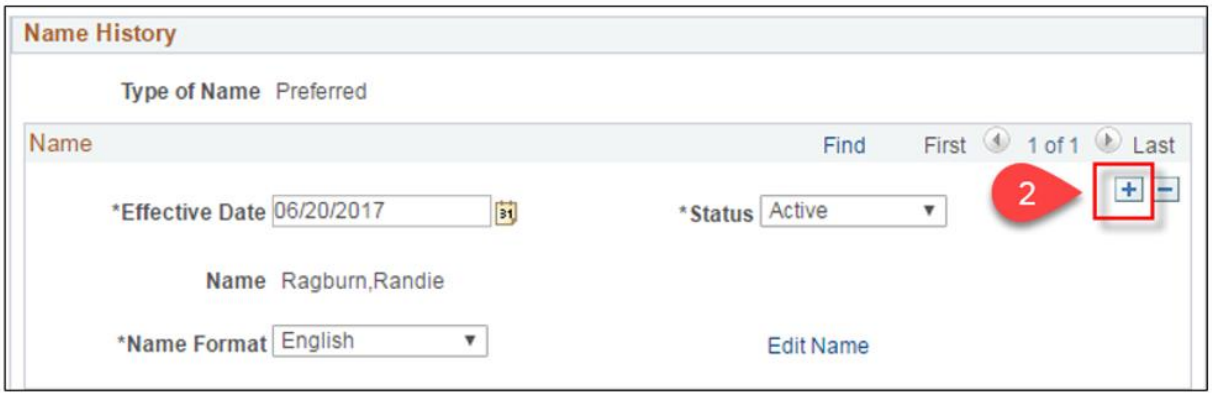
4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Update the desired name.

1. Click View Name History on the desired Type of Name row.

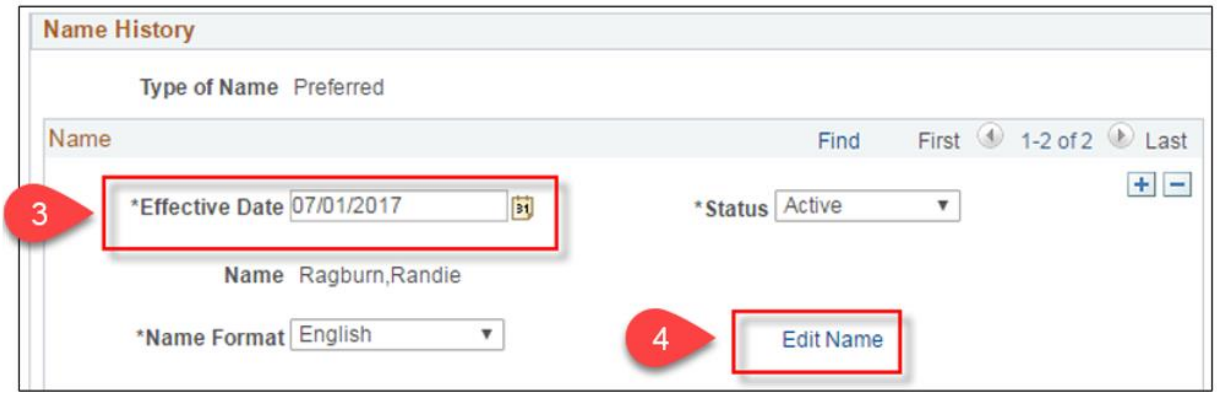


2. Click Add a Row (+).

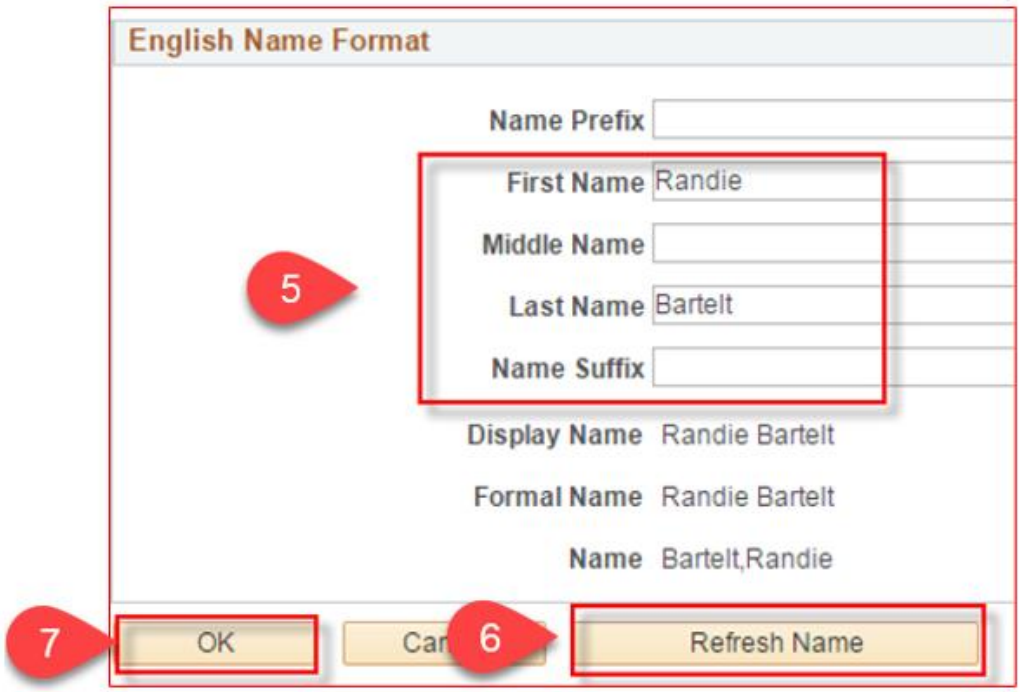


3. For the newest/top row, enter or select the desired Effective Date.

4. Click Edit Name.



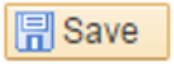
5. Enter the desired name field information for the selected name type.
6. Click Refresh Name to display the new name formats and verify correct entry.
7. Click OK



8. Click OK again



8. Click Save



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Effective Date: 10/02/17

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

3.3.2.2 Managing Employee Addresses

Updating an Employee Address
Adding An Additional Employee Address Type
Inactivating An Employee Address

Updating an Employee Address

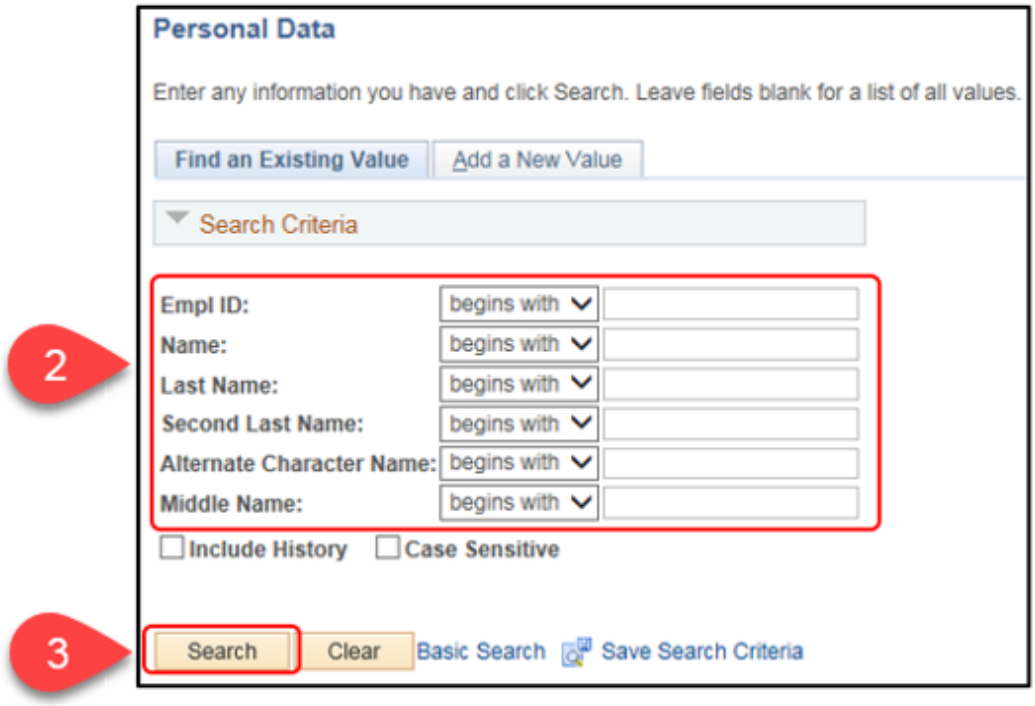
Role: Agency HR Specialist



Employees should be encouraged to update their home and mailing address through ESS, but there may be circumstances where the HR Specialist needs to make updates on behalf of the employee.

STEP 1: Navigate to the Personal Data pages and locate the desired employee.

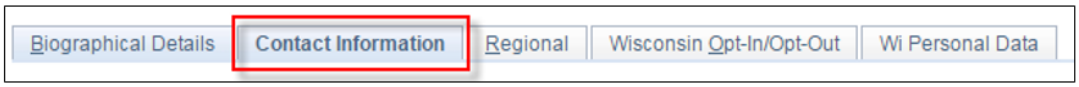
1. Navigation: Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person
2. Enter the desired search criteria.
3. Click Search.



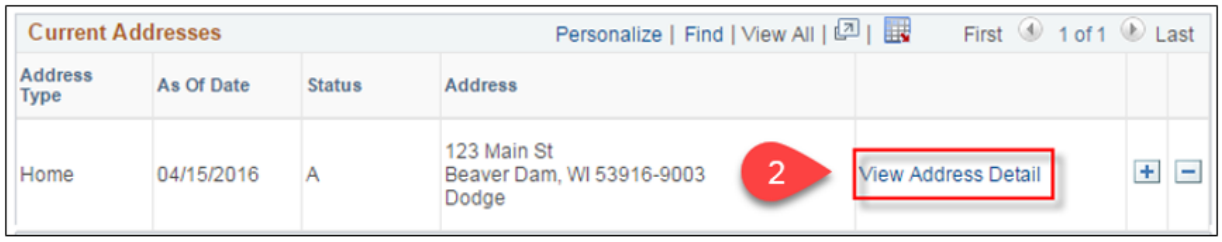
4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Update the address from the Contact Information tab.

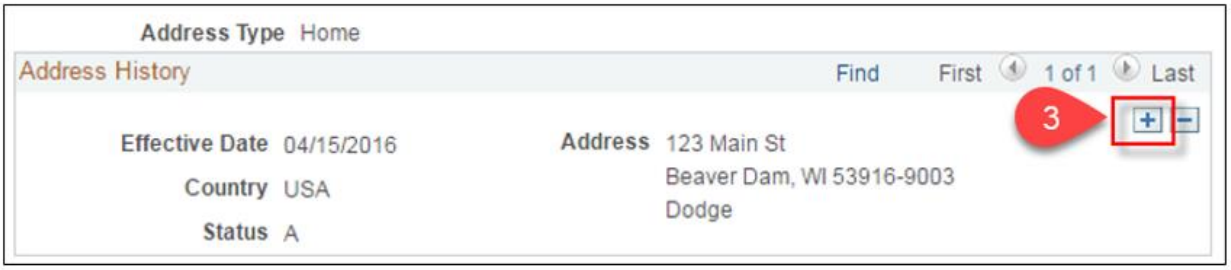
1. Click on the Contact Information tab.



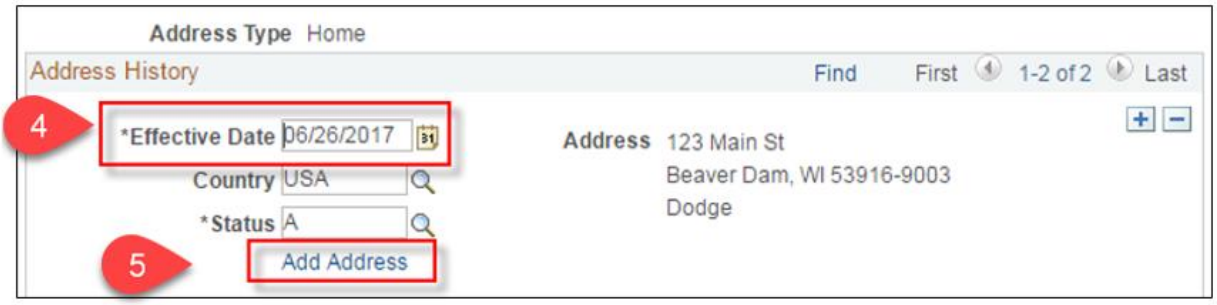
2. Under the Current Addresses section, select View Address Detail for the Address Type row to be updated.



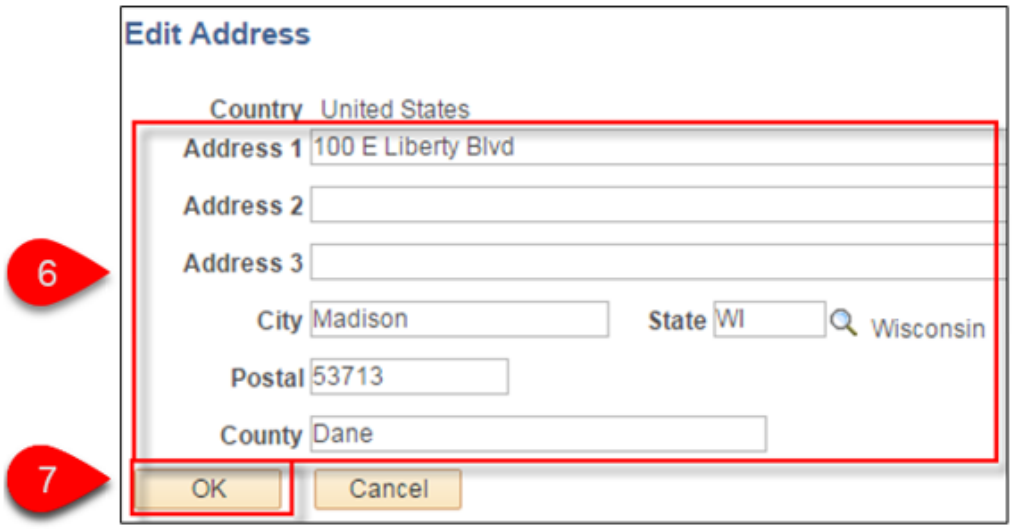
3. Click Add a Row (+) to add a new effective dated row.



4. Enter or select the desired Effective Date for the updated address.
5. Click Add Address.



6. Make updates to the address fields as needed, then click OK.



7. Click OK again



8. Click Save



RESULT: The employee's updated address displays in the Current Address section.

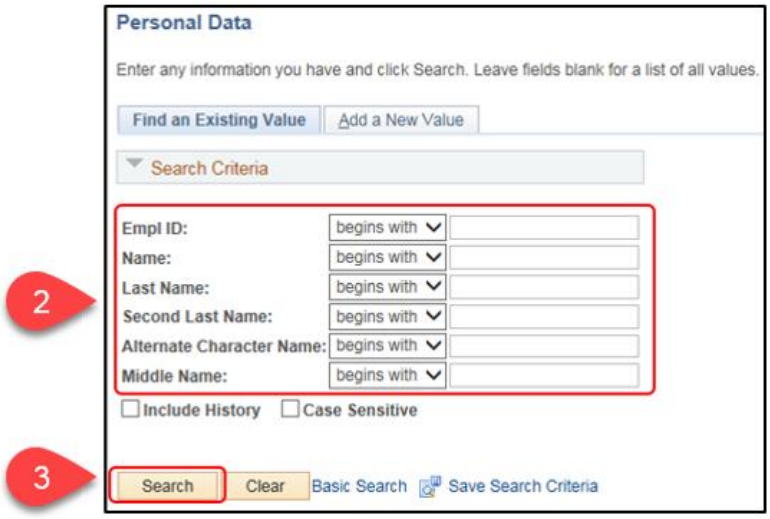
Adding An Additional Employee Address Type

Role: Agency HR Specialist

Employees only need mailing addresses if their mail should be sent somewhere other than their home address.

STEP 1: Navigate to the Personal Data pages and locate the desired employee.

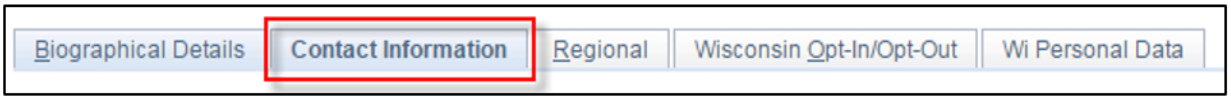
1. Navigation: Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person
2. Enter the desired search criteria.
3. Click Search.



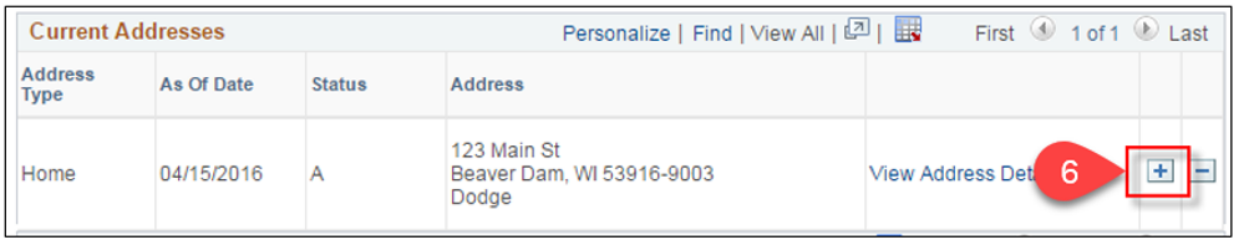
4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Update the address from the Contact Information tab.

5. Click on the Contact Information tab.



6. Under the Current Addresses section, select Add a Row (+) to add a new Address Type.



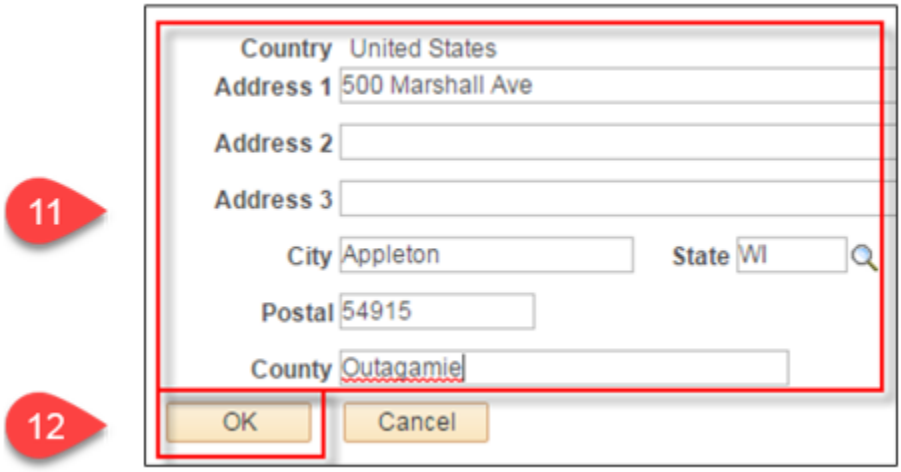
7. Select the desired Address Type from the list of remaining options.
8. Click Add Address Detail.



9. Enter or select the desired Effective Date.
10. Click Add Address.



11. Enter the desired address details.
12. Click OK.



13. Click OK again



14. Click Save

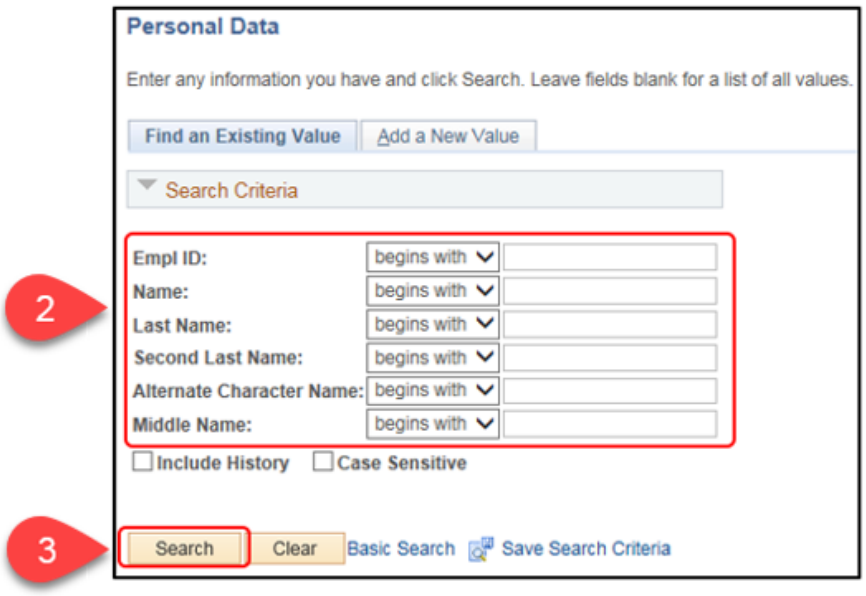


RESULT: The employee's additional address displays in the Current Address section.

Inactivating An Employee Address

STEP 1: Navigate to the Personal Data pages and locate the desired employee.

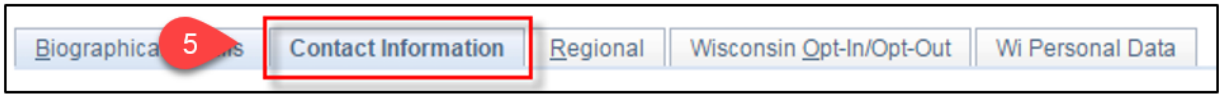
1. Navigation: Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person
2. Enter the desired search criteria.
3. Click Search.



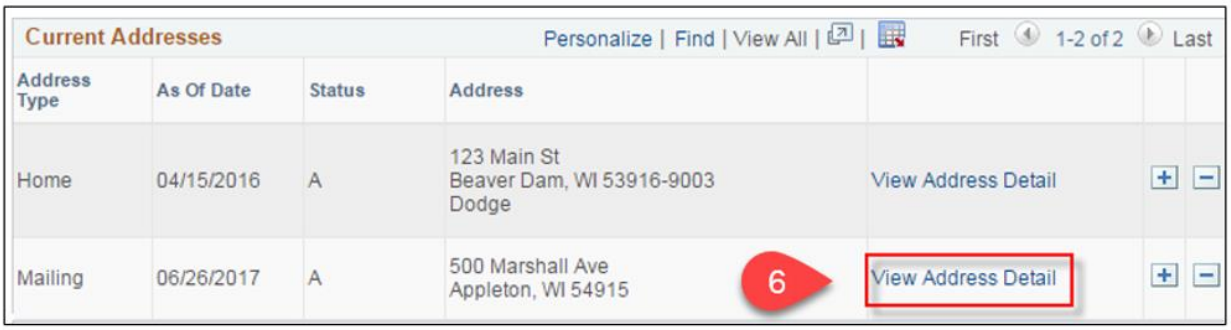
4. If multiple employees result, click the desired employee from the Search Results list.

STEP 2: Update the address from the Contact Information tab.

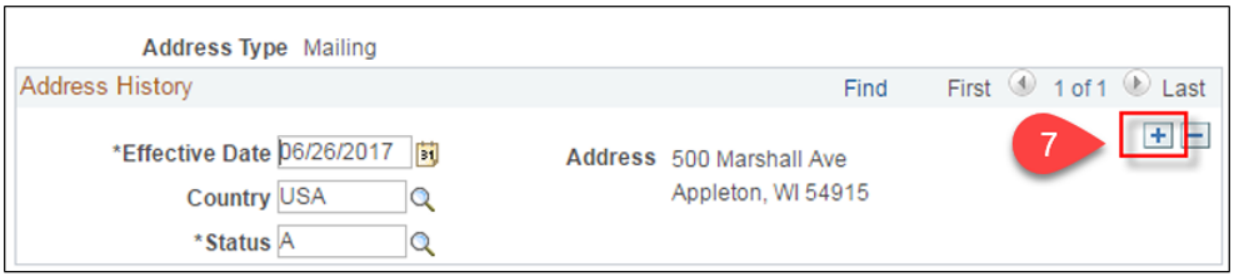
5. Click on the Contact Information tab.



6. Under the Current Addresses section, select View Address Detail for the desired Address Type row.



7. Click Add a Row (+).



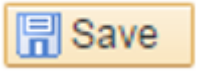
8. Update the Effective Date as necessary.
9. Enter or select a Status of I (Inactive).



Click OK



Click Save



RESULT: The employee's address is inactivated.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3.3 Maintain Job Data

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HCM User Guide
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Contact Us

3.3.3.1 Job Data Auditing

Purpose
Run and Export the Query
Auditing Overview
Interpreting the Query Results
- Job Data: Work Location Tab
- Job Data: Job Information Tab
- Job Data: Payroll Tab
- Job Data: Compensation Tab
- Job Data: Employment Data Link
- Job Data: Benefits Program Participation Link

Purpose

The HR Specialist security role is responsible for entering job data into STAR PeopleSoft HCM. This reference guide will provide information on how agencies can run a query to return job data rows that have been entered during a specific timeframe. Agencies will review the entries internally to identify data entry errors and opportunities for training.



It is recommended that agencies audit regularly to avoid negative downstream impacts as well ensuring that employee data is accurate.

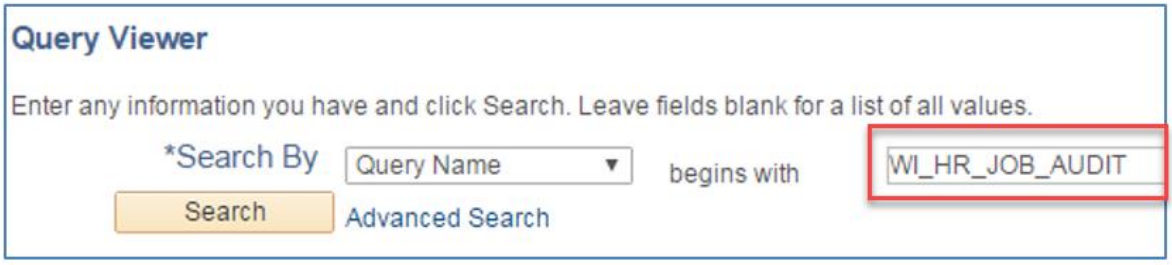
Watch Video This video is a 34 minute training webinar held in May 2017. You must register to view the video for tracking purposes.

Run and Export the Query

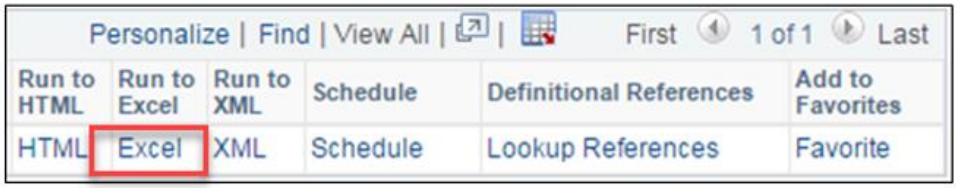
1. Navigate to **Main Menu > Reporting Tools > Query > Query Viewer**

2. In the "**begins with**" box, type in the name of the query. You don't have to type in the full name.

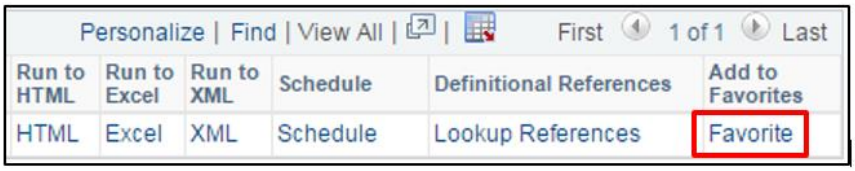
   Query Name: **WI_HR_JOB_ AUDIT**



3. Click **Excel**. This will put the query results directly into Excel.

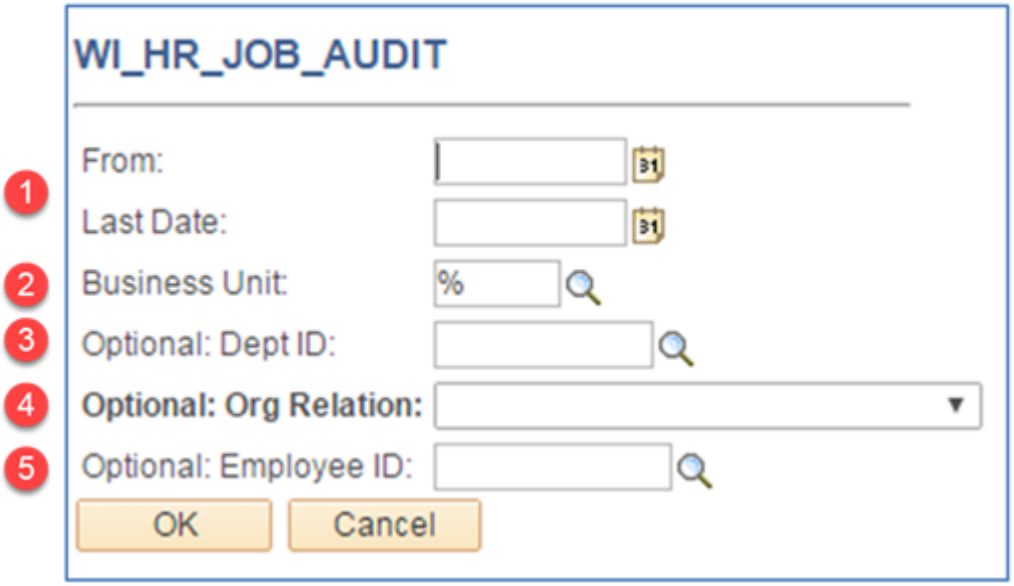


You can also click **Favorite** to add the query to your favorites list. Favorited queries will show up on your query viewer screen without having to search for them in the future.



4. Enter the search criteria into the prompts
   1. **From and Last Date:** These are the dates that the job data rows were entered or last updated- not necessarily the effective date of the rows.
   2. **Business Unit**: 5-digit agency code. Row-level security is enforced.

3. **Dept ID:** The wildcard (%) will return all values that you have access to. To reduce the results, you can use the wildcard after entering some numbers: 505P%
4. **Org Relation:** To search by organizational relationship, select Person of Interest, Contingent Worker, or Employee
5. **Employee ID:** To search for all rows for a particular employee during the date range, enter the employee ID.



Auditing Overview

Auditing the job data that was entered into PeopleSoft is two-fold; 1) The auditor needs the documentation, such as the appointment letter or new hire form, to verify the information that was entered into the system, and 2) The auditor needs to have familiarity about how data should be entered into PeopleSoft STAR HCM.

The query data is pulling directly from the employee's job data. There may be times where you need to look at the employee's job data in PeopleSoft to understand the employee's job history as the data from the query is only looking at a snapshot in time.

If you come across data entry errors, do not add a row to fix it. Follow your agency's procedure for logging a STAR Support Ticket. Your support ticket should include the employee's ID, the empl record, and the fix that's needed. Any changes to an employee's compensation requires documentation, such as an appointment letter.

Interpreting the Query Results

The query pulls data based on the date the job data row was **last updated**. This will include both new job data rows that have been entered at your agency as well as job data row that were corrected by STAR, DPM, Central Benefits, and Central Payroll during the data range in the query search parameters.

The results sort by Last Name, First Name, Empl Record, Effective Date (descending), and Effective Sequence (descending). Fields are in the order that they appear in job data (Main Menu > Workforce Administration > Job Information > Job Data).

Note: "People Stealer" (Data Change – *Transfer* Data Between Agencies) rows may not have correct information as the only information that gets updated on these rows is the position information. There is no need to submit correction requests for data that is wrong on this row.

Job Data: Work Location Tab

1. **Employee ID, Empl Record**
    - Each person in the system has a unique ID number.
    - A person will have more than one empl record in the following instances:
        - They hold concurrent appointments, including being on leave to fill an unclassified position
        - They have more than one organizational relationship type

2. **Last Name, First Name, Middle Name**
    - A person's name should be their legal name, as it appears on their social security card

3. **Organizational Relationship and POI Type**
    - There are three organizational relationship types; Employee, Contingent Worker, and Persons of Interest (POI)
    - If the person is a POI, this column will show what type of POI they are

4. **Action Date** (System Generated)
    - This is the date the row was originally entered into PeopleSoft

5. **Effective Date**
    - This is the date that the row is effective
    - Personnel transactions are effective at the beginning of the pay period; either Sunday or Monday
        - Appointment start dates did not change with the release of PeopleSoft
        - Review the appointment letter to ensure it matches the date in PeopleSoft

6. **Sequence**
    - This is the order of the rows that have the same effective date

- Example: Transfer – Within Agency would be sequence 0, and Pay Rate Change – Transfer would be sequence 1.

7. Action and Action Reason

- See the Action/Action Reason job aid for descriptions of the Action/Action Reason combinations.
- Pay rate changes should be on a separate row except for the following:
  - Hire
  - Rehire
  - Transfer – Transfer Term *LTE* Appointment
  - Transfer – Transfer Term Project Appointment

8. Job Indicator

- All employees must have one primary job. Employees with more than one concurrent appointment will have a secondary job.
- Example: Employee is on a LOA to fill an unclassified position. Their classified position is their secondary job, and their unclassified position is their primary job.

9. Position Number

- Position number the employee is in as of the job data row
- POIs and Contingent Workers do not have position numbers except for DMA's federal supervisors

10. Position Entry Date (System Generated)

- Date the employee started in the position number
- Gets updated when a new position number is entered on the employee's job data
- Synonymous with Appointment Start Date

11. Business Unit

- 5-digit agency number
- Populates from position data, except for POIs and CWs

12. Department ID and Department ID Description

- 10-digit code that indicates the hierarchical structure of the agency
- Each 10-digit code has a corresponding description
- Populates from position data, except for POIs and CWs

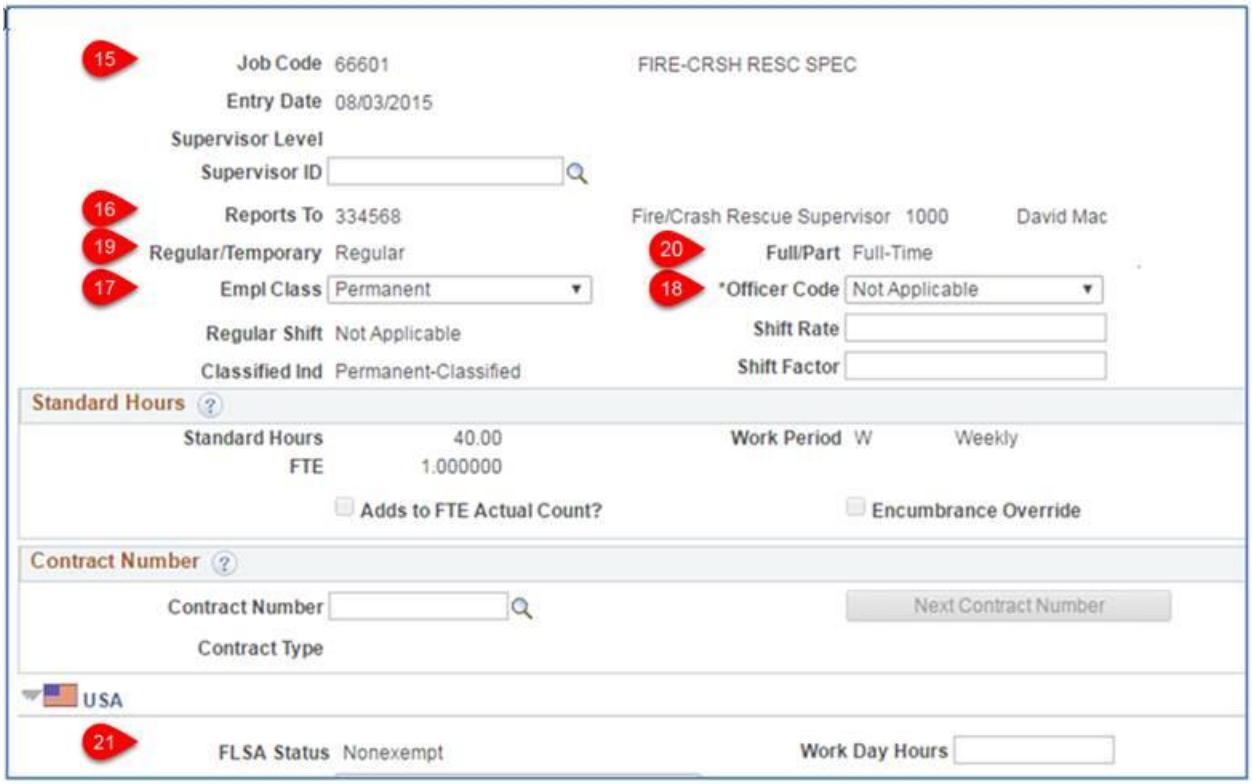
13. Location and Location Description

- Code and description where person is physically located
- Populates from position data, except for POIs and CWs

14. Establishment ID

- 3-digit agency code

Job Data: Job Information Tab



15. Job Code, Job Code Description, Salary Plan, and Salary Grade

- Class code, class code description, *pay schedule*, and pay rage
- Populates from position data, except for POIs and CWs
    - POIs should use POI00
    - CWs should use 99400

16. Reports To

- Position number the person reports to
- Required both for employee and nonemployees

17. Empl Class

- Type of Employee
- POIs use NON
- Contingent Workers use CTR
-

Code	Description
AMC	Ameri Corps
BDM	Board Member
CTR	Contractor
ELC	Elected - Unclassified
LTE	Limited Term Employee
NGD	National Guard - Emergency
NON	Non-Employee
NTC	National Teacher

OFW	Offender Worker
PAW	Patient Worker
PPR	Project – Permanent
PRJ	Project – Project
PRM	Permanent
SNL	Seasonal
TBC	Teacher Board Certification
TRN	Trainee
ULE	Unclassified *LTE*
UNC	Unclassified
VSC	VISTA Service Corps

18. Officer Code

- Designates *career executive* status
- C for career execs and N for non-career execs.

19. Position Type

- Populates from position data
- Should be applicable to the empl class that's in the position
    i. Example: LTEs are in a position type of Limited Term Employment

20. FTE

- Populates from position data, except for POIs and CWs
    i. LTEs should have an FTE of 0
    ii. POIs and CWs should have an FTE of 0

21. FLSA Status

- Populates from position data based on job code
- Use DPM's Alpha List to determine the appropriate FLSA Status

Job Data: Job Labor Tab



22. Bargaining Unit and Labor Agreement

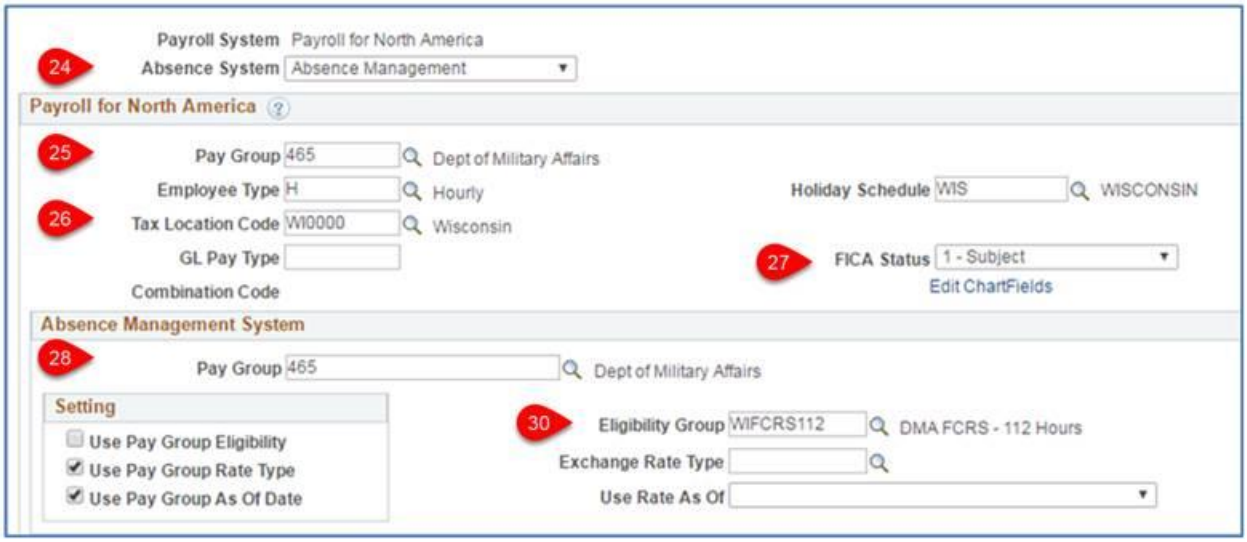
- Pay schedule
- Fields are required to populate the Employee Category field

23. Employee Category

- Synonymous with *Employing Unit*
- 6-digit code

- Not required for POIs and CWs

Job Data: Payroll Tab



24. Absence System

- Employees should have Absence Management (AM)
- CWs and POIs should have Other (OT)

25. Pay Group (Payroll System)

- 3-digit agency code, except for DMA Fire Crash and Rescue who use CRS

26. Tax Location Code

- The state the employee works

27. FICA Status

- Tells the system if FICA taxes should be taken from the employee. There are very few instances where it FICA taxes wouldn't be taken.
- Should be 1 - Subject for nearly everyone

28. Pay Group (Absence System)

- 3-digit agency code, except for DMA Fire Crash and Rescue who use CRS

29. Pay Group Elig Flag

- Everyone with an Absence System of AB should have a N
  i. N indicates that the "Use Pay Group Eligibility" checkbox is unchecked

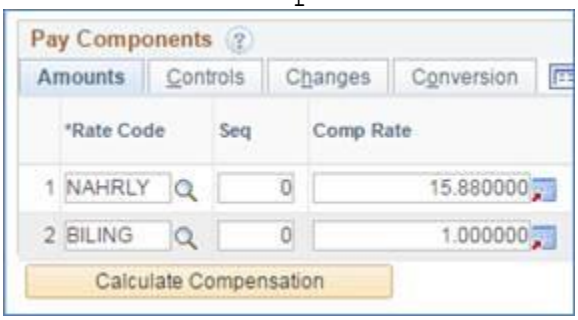
30. Absence Eligibility Group

- In conjunction with FLSA and FTE, this field determines an employee's leave balances

WICONOFFEE - Constitutional Office Employee
WICRAFT100 – Craft Employees 100 hours

WICRAFT140 – Craft Employees 140 hours
WICRAFT180 – Craft Employees 180 hours
WIDOTLETI – DOT SP Troopers and Inspectors
WIEXPRJEE – *Exempt* Employees Project
WIEXPRMEE – Exempt Employees Permanent
WIFCRS112 – DMA FCRS 112 hours
WIFCRS96 – DMA FCRS 96 hours
WINEXPRJEE – Nonexempt Employees Project
WINEXPRMEE – Nonexempt Employees Permanent
WINOTELIG - Not Eligible for Leave
WISEASONAL – Seasonal Employees
WIUCEXEE – Unclassified Exempt Employees
WIUCNEXEE – Unclassified Nonexempt Employees
WIWKDNRS – Weekend Nurses

Job Data: Compensation Tab



31. Rate Code and Comp Rate

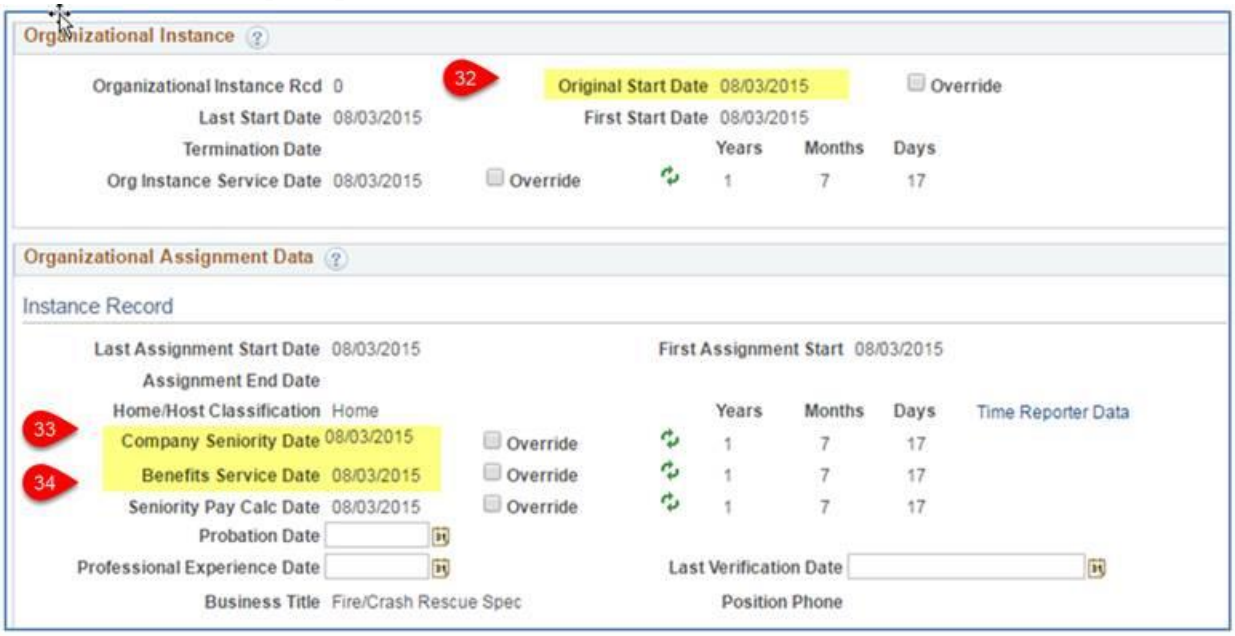
- All employees should have a value of NAHRLY or NAANNL. This is an employee's base rate.
- Note: If the employee has more than one rate code (if they have add-ons), the row will appear once per rate code in the query results

Rate Code	Description
AIRMEC	Aircraft Mechanic
ATTYSM	Attorney Supervisor/Manager
BCEPHY	Board Cert Elig - Physician
BCEPSY	Board Cert Elig - Psychiatrist
BCPHYS	Board Certification -Physician
BCPSYC	Board Cert - Psychiatrist
BILING	Bilingual
CONCOS	Construction Coordinator Super
CPAPOS	CPA - Post-Certification

CPAPRE	CPA - Pre-Certification
CSUBAC	Clinical Substance Abuse Couns
DENMAN	Dentist Management
DENSUP	Dentist Supervisor
DEPADM	SBO - Deputy Admin, DEBF
DIGPRO	DOT Dignitary Protection Unit
ENGIN1	Engineer 1
ENGIN2	Engineer 2
EPBAAD	SBO - Exec Pol & Bud An - Adv
EPBAEN	SBO - Exec Pol & Bud An -Entry
EPBAJR	SBO - Exec Pol & Bud An - Jrny
EPBASR	SBO - Exec Pol & Bud An - Senr
EPBMAN	SBO - Exec Pol & Budg Manager
FINEX1	Financial Examiner - Level 1
FINEX2	Financial Examiner - Level 2
FINEX3	Financial Examiner - Level 3
FINEX4	Financial Examiner - Level 4
FIREAR	Firearm
GENAPP	General Appraiser, Certified
INFEAC	Insurance/Fin Examiner Accred
INFECE	Insurance/Fin Exam Certified
MAEDUC	Master Educator
NAANNL	Default NA Annual
NAHRLY	Default NA Hourly
ORALSU	Oral Surgery
PHYMAN	Physician Management
PHYSUP	Physician Supervisor
PLUMBI	Plumbing
PPDOAC	Power Plant - DOA
PROSUP	Procurement Supervisor
PRSPAD	Procurement Specialist - Advan
PRSPEC	Procurement Specialist
PRSPOB	Procurement Specialist - Objec
PRSPSR	Procurement Specialist - Senio
PSYCHL	Psychologist
PSYMAN	Psychiatrist Management
PSYSUP	Psychiatrist Supervisor
SACINT	Subs Abuse Couns in Training
SCIENC	Science related

SPAINC	Special Agent in Charge
SUBABC	Substance Abuse Counselor
TCHR06	Teachers - 06 Credits
TCHR12	Teachers - 12 Credits
TCHR18	Teachers - 18 Credits
TCHR24	Teachers - 24 Credits
TCHR30	Teachers - 30 Credits
TCHR36	Teachers - 36 Credits
TCHR42	Teachers - 42 Credits
TCHR48	Teachers - 48 Credits
TCHR54	Teachers - 54 Credits

Job Data: Employment Data Link



32. Original Start Date

- Synonymous with Continuous Service Date
- System will auto-populate with hire date. Ignore for non-permanent employees

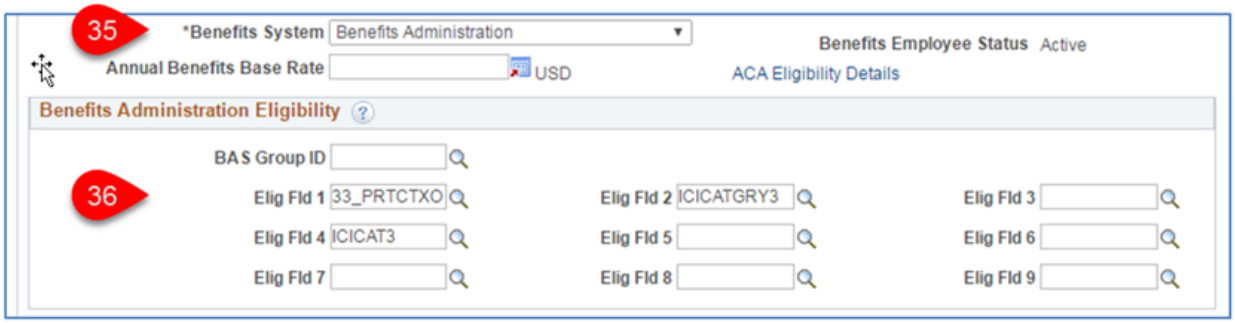
33. Company Seniority

- Synonymous with Adjusted Continuous Service Date
- Drives when an employee is eligible to use their vacation
- System will auto-populate with hire date. Ignore for non-permanent employees

34. Benefits Service Date

- Drives when an employee is eligible for the employee contribution towards health insurance
- Based on state WRS
- System will auto-populate with hire date. Ignore for non-permanent employees

Job Data: Benefits Program Participation Link



35. Benefits System

- Employees should have Benefits Administration (BA)
- CWs and POIs should have Other (OT)

36. Elig Fld 1

- An employee's WRS category
- NOTELIG should only be used for individuals who will never be eligible for WRS
    i. AmeriCorps, Board Member, Contractor, Natl Guard, Non Employee, Offender/WK, Patient/WK, Teachbrcrt, Vista

Elig Cfg Value	Description
30_GENERAL	General Employee
31_COURTRP	Court Reporter
32_EXECRET	State Executive Retirement
33_DOTGRDF	Protective Grandfathered DOT
33_PROTECT	Protect-notDOA,DNR,Jus,MA,DOT
33_PRTCTXO	Protect-Justice, Military, DOA
33_PRTCTXX	Protective DNR & DOT Reg
40_TEACHER	Teacher
41_EXECTEA	State Teacher Executive Plan
42_EDUCSUP	Educational Support Personnel
46_EXECLEG	Legis, Const Officers, DAs
BENELIG_95	In MKE retirement sys BNelig
NOTELIG	Not Eligible Default
NOTELIGLEG	Legislature-AnnuitantElected
NOTELIG_90	NotElig- No WRS before 7/1/11
NOTELIG_91	NotElig-Had WRS before 7/1/11
NOTELIG_92	Reh Ann retired pre 7/2/13
NOTELIG_93	RehAnn post7/1/13WRSpre7/1/11
NOTELIG_94	RehAnn post 7/1/13 noWRS7/1/11

37. Elig Fld 2

- An employee's ICI eligibility

Elig Cfg Value	Description
ICIBASSUP1	ICI Basic+Supplemental 1
ICIBASSUP2	ICI Basic+Supplemental 2
ICIBASSUP3	ICI Basic+Supplemental 3
ICIBASSUP4	ICI Basic+Supplemental 4
ICIBASSUP5	ICI Basic+Supplemental 5
ICIBASSUP6	ICI Basic+Supplemental 6
ICICATGRY1	ICI Category 1
ICICATGRY2	ICI Category 2
ICICATGRY3	ICI Category 3
ICICATGRY4	ICI Category 4
ICICATGRY5	ICI Category 5
ICICATGRY6	ICI Category 6

38. Elig Fld 3

- Must be filled in for employees who are eligible for WRS, but not for the full employer health insurance contribution. For example, a WRS eligible *LTE*.

Elig Cfg Value	Description
100EMPPAID	Employees paying 100% SGH
ALLPOSTTAX	Employee elected all post tax
LESSTHAN50	Pay < 1/2 time SGH rate
LTEFULLSGH	LTE receiving full ER for SGH

39. Last Updated and by

- This is the last date that this row was updated. It may be the same as the action date, but it may be a more recent date if DPM, Central Payroll, Central Benefits, or STAR made corrections to the row.
- The by column shows who made the last update to the row.
- This date is the date the query's prompt is driven off of.
- Note: If the value is **WI_BATCH_HCM**, then this job row was the result of a position update. You can look up the position request if you need to see who made the change.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
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3.3.3.2 Reclassification and Reallocation

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Update Position 3
Position-Related Job Data Updated by PeopleSoft 4
Update Date Compensation 5
Update Absence Eligibility Group (If Applicable)7
Update Workgroup (If Applicable)8
Adjust Absence Balances (If Applicable)9
Checklist: Reclassifcation/Reallocation .....
Resources

Notes On Using This Guide

- The scope of the guide only covers those processes directly related to *reclassification* or allocation.
- Fields, icons, and buttons not addressed are either not being used by the State or are not applicable to the topic.
- At the start of each process, the associated PeopleSoft security role is identified.

IMPORTANT

DO NOT process a reclass if any of the following apply:

- If the reclass effective date is on or before 11/29/2015 (i.e. STAR conversion date). Note: PeopleSoft will auto-calculate back pay owed starting on 12/13/2015. Any back pay owed prior to 12/13/2015 will need to be paid out through a Pay One Time Transaction (POTT).
- If there are any position changes that have an effective date that is later than the effective date of the reclass (Reports To, FLSA, etc.).
- If there are any job data changes that have an effective date that is later than the effective date of the reclass (ICI Job Row, Pay Rate Changes, hiring transactions, etc.).

In STAR, when updating a filled position, such as in a reclass, you must enter an effective date that is later than the current position data row and the current job data row. Because reclass effective dates occur in the past, Agency HR staff must first review the effective dates of position and job data and only enter a reclass if there are no position or job data effective dates that are later than the effective date of the reclass.

If there are position data or job data rows with an effective date after the effective date of the reclass, then the agency must submit a ticket to the STAR Support Organization (SSO) for reclass processing (please include the Reclass/*Reallocation* Form). If the reclass requires SSO processing, do not enter any data related to the reclass.

Update Position

Role: *Position Management Specialist*

Use the Position Request form to request a change of Job Code for the desired position.

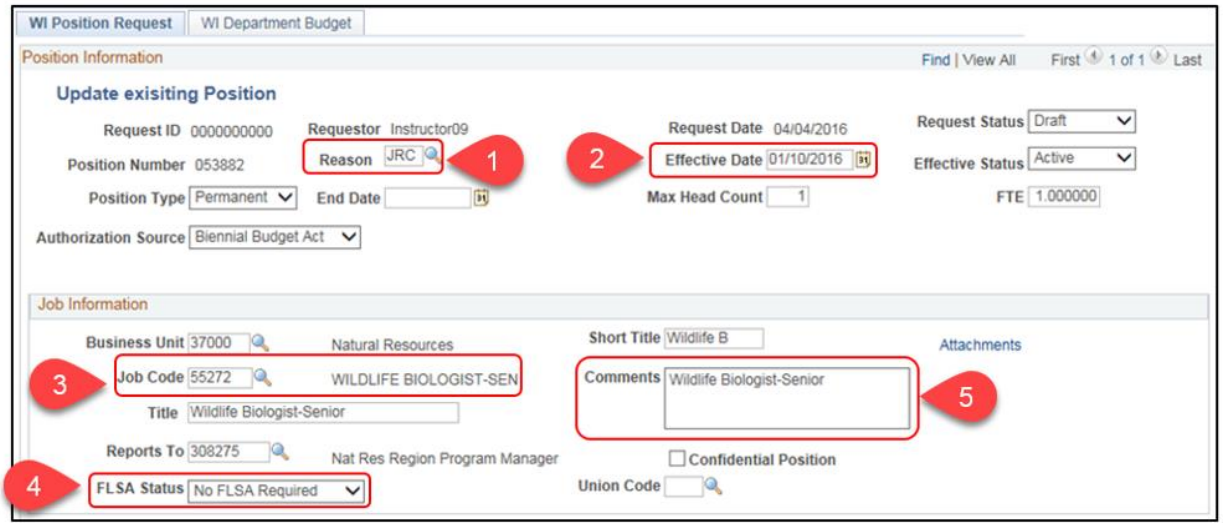
1. Navigation: **Main Menu > State of Wisconsin (STAR) > Human Resources > Process > WI Position Requests > WI Position Request Home**
2. Enter or select the Position Number that requires updates.
3. Click Update Existing Position.



On the WI Position Request tab, enter or select the following:

1. Reason: Enter or select JRC (Job Reclassification) or JRE (Job Reallocation)based on the situation.
2. Effective Date: The date the change to the position becomes effective.
3. Job Code: Enter or select the new job code.
4. FLSA Status: (If needed) select the appropriate value.

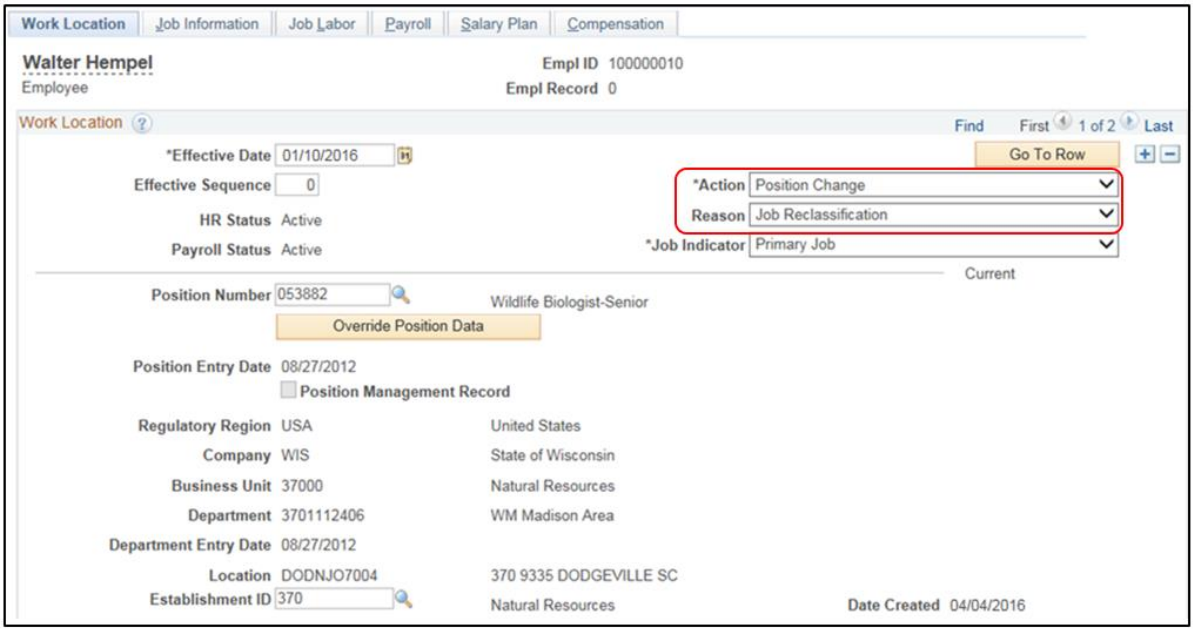
5. Enter any additional comments in the Comments field to identify and justify any changes.
6. Click Save and Submit.



Position-Related Job Data Updated by PeopleSoft

Once the Position has been updated with the new Job Code, PeopleSoft automatically adds a new row to the Job Data of the person assigned that position number. The Effective Date of the new row is the date which was entered when updating the position and the following action/action reason is used: Action of *Position Change* and Action Reason of *Job Reclassification* or *Job Reallocation* based on the situation**.**

It may take up to 15 minutes for the position change row to appear on job data after the approval.



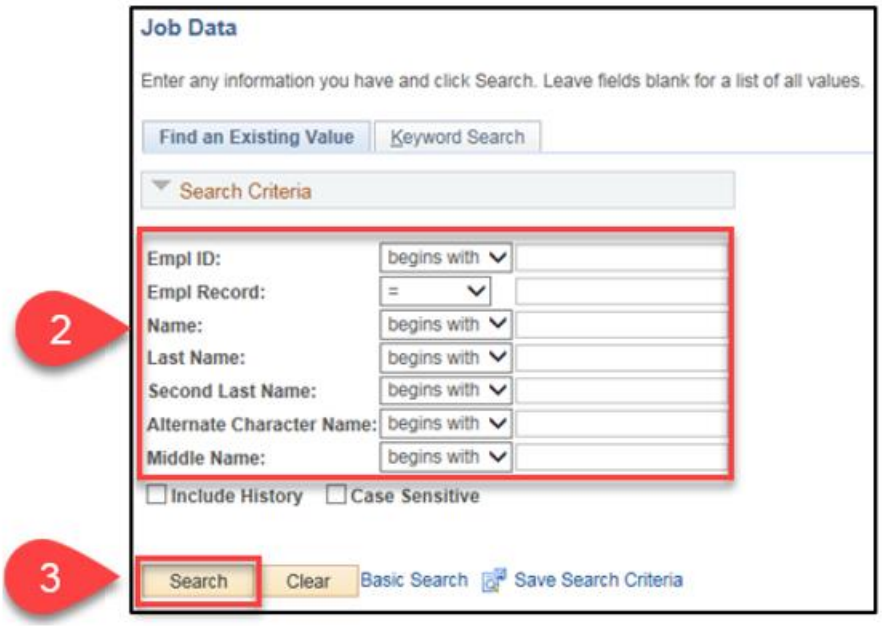
Action Description *(PAY)*	Reason Description	Explanation	Payroll Status	HR Status	Benefit Employee Status	BAS Action
Position Change *(POS)*	**Job Reallocation** *(JRE)*	On position data, used when the position is reallocated while the position has an *incumbent*. Reallocation may require a separate pay adjustment action.	Active	Active	Active	POS
Position Change *(POS)*	**Job Reclassification** *(JRC)*	On position data, used when the position is reclassified while the position has an incumbent. Reclassification may require a separate pay adjustment action.	Active	Active	Active	POS

Update Date Compensation

Role: *Agency HR Specialist*

Do not update the compensation until AFTER the position information has been updated, approved, and appears on the Job Data.

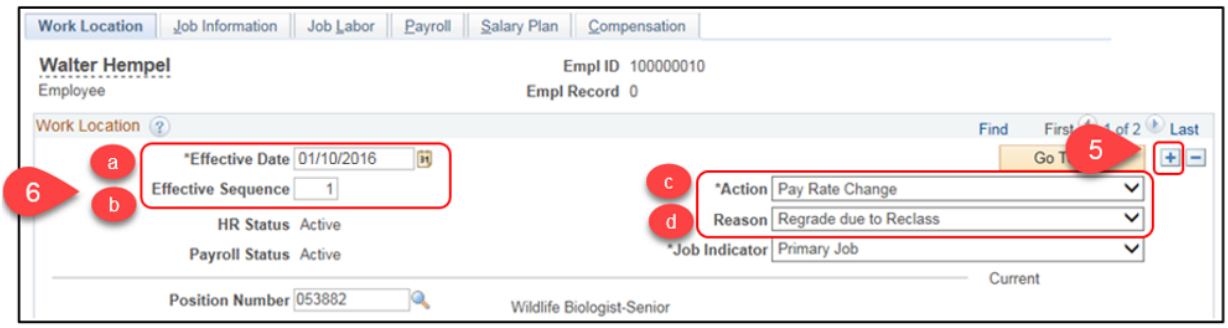
1. *N*avigation: **Main Menu > Workforce Administration > Job Information > Job Data**
2. Enter the desired search criteria.
3. Click Search



4. If multiple employees result, click the desired employee from the Search Results list.
5. On the Work Location tab, click Add a Row (+) to add a new effective dated row.
6. Enter the following:
    a. Effective Date: Select the effective date of the pay rate change.
    b. Effective Sequence: Enter the appropriate value, if necessary.
        - If the pay rate change occurs on the same day as another transaction (for example the automatic position change row created by PeopleSoft), this field must be incremented up to allow multiple rows of entry on the same Effective Date.
    c. Action: Select Pay Rate Change.
    d. Reason: Select the appropriate Reason based on the table below.

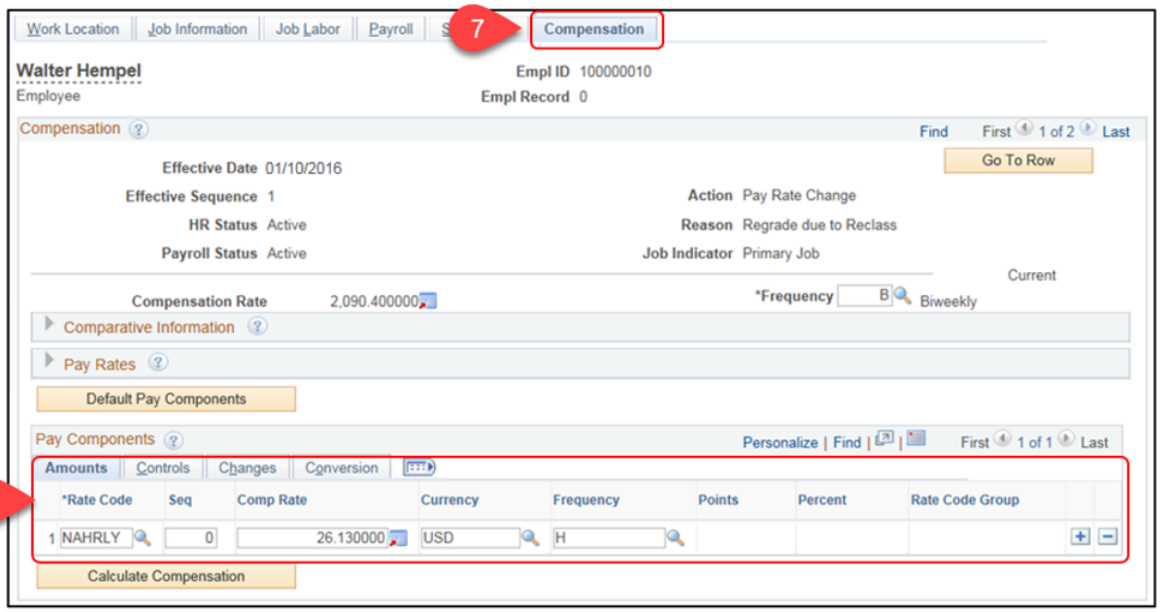
Action Description *(PAY)*	Reason Description	Explanation	Payroll Status	HR Status	Benefit Employee Status	BAS Action
Pay Rate Change *(PAY)*	**Regrade due to Reallocation** *(REA)*	Used when the position change is logical, but not gradual.	Active	Active	Active	PAY

Pay Rate Change *(PAY)*	**Regrade due to Reclassification** *(REC)*	Used when the position change is logical and gradual.	Active	Active	Active	PAY



7. Click the Compensation tab.
8. In the Pay Components section, overwrite the base Comp Rate as needed.
9. Click Add a Row (+) to add any additional rows necessary. Additional rows re used for Pay Add-Ons, such as pay for licensing, exams, or firearms, etc. Click emove a Row (-) to remove any Add-ons necessary.
10. Click Calculate Compensation.

PeopleSoft automatically picks up the pay rate change, calculates any back pay,and submits for retro payment. Refer to the Retro Pay Query Job Aid for a listing of all earnings included in retroactive pay.



Process Branch – Choose One

1. If the reclassification did NOT include a change to FLSA status, **the process is complete.** Click **Save**.

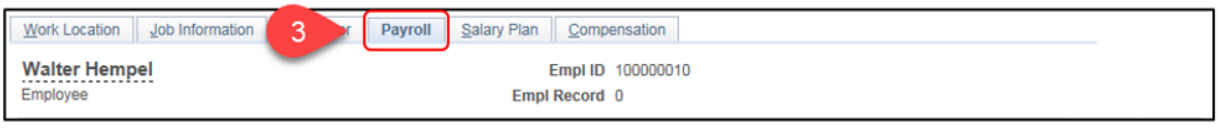
OR

2. If the reclassification DID include a change to FLSA status, continue with the following steps.

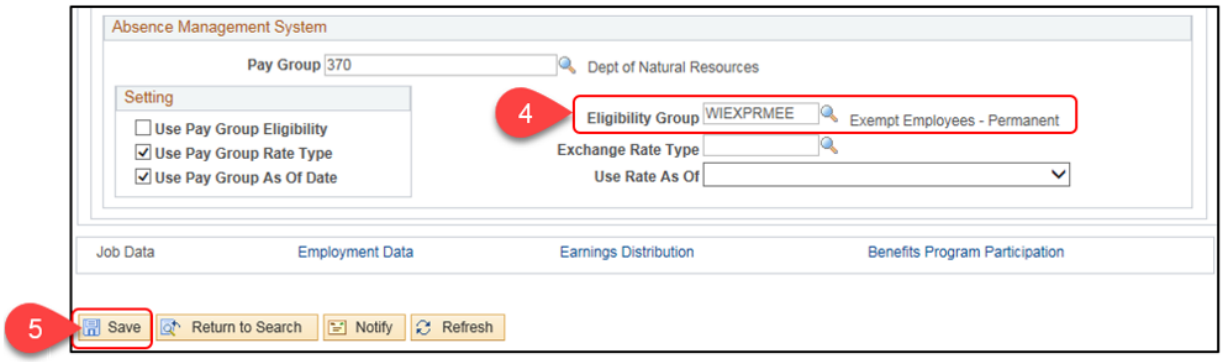
Update Absence Eligibility Group (If Applicable)

Role: Agency HR Specialist

1. On the Work Location tab, click Add a Row (+) to add a new effective dated row.
2. Enter the following:
    - Effective Date: Select the effective date of the pay rate change.
    - Effective Sequence: Enter the appropriate value, if necessary.
        - If the pay rate change occurs on the same day as another transaction (for example the automatic position change row created by PeopleSoft), this field must be incremented up to allow multiple rows of entry on the same Effective Date.
    - Action: Data Change
    - Reason: Other Data Change
3. Click the **Payroll** tab.



4. In the Absence Management section, update the Eligibility Group as appropriate.

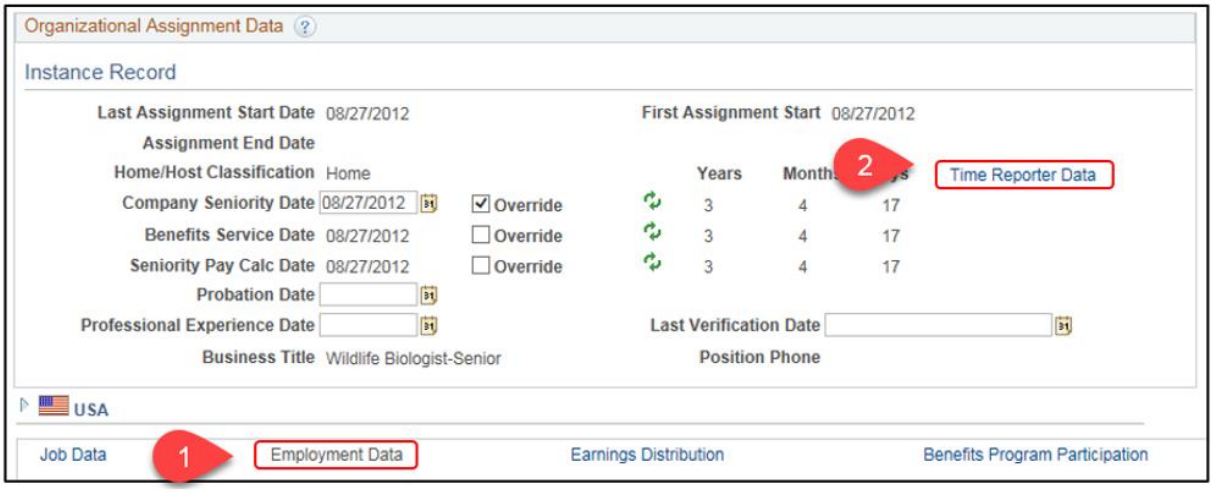


5. Click Save

Update Workgroup (If Applicable)

Role: *Agency HR Specialist or Agency T&L Specialist*

1. Click the Employment Data link at the bottom of the page.
2. Click the Time Reporter Data link.

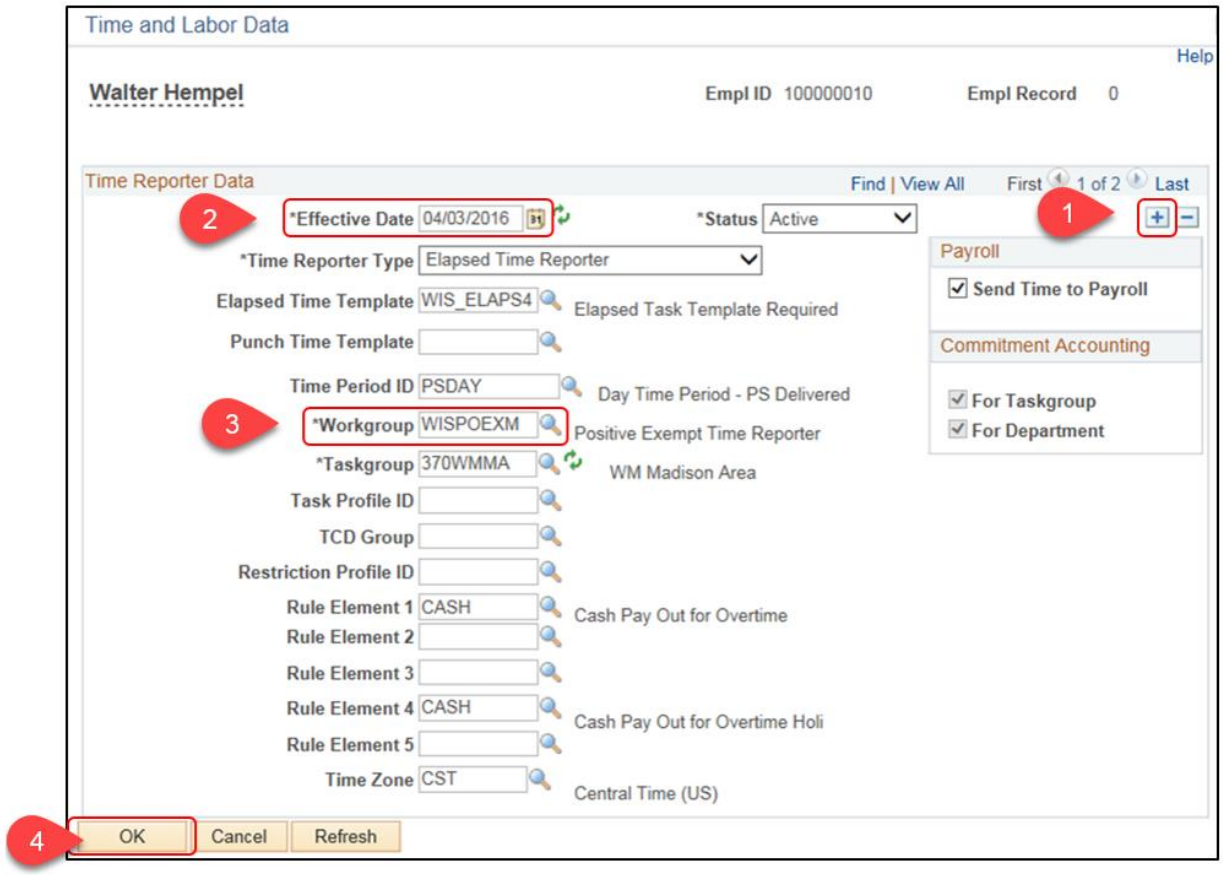


If using the Time and Labor specialist role rather than HR Specialist, the Time and Labor Data can be accessed through the following navigation: Main Menu > Time and Labor > Enroll Time Reporters >Maintain Time Reporter Data

1. Click Add a Row (+).
2. Enter the Effective Date: The effective date should be the first day of the pay period after the reclass was approved.

Regardless of the workgroup update, retro pay-qualified earnings for time worked during the waiting period are recalculated and automatically submitted based on the compensation update. Use the retro pay query to review retro pay and request adjustments as needed. Refer to the Retro Pay Query Job Aid.

3. Update the Workgroup
4. Click OK.



5. Click Save.

Adjust Absence Balances (If Applicable)

Role: *Agency Absence Specialist*

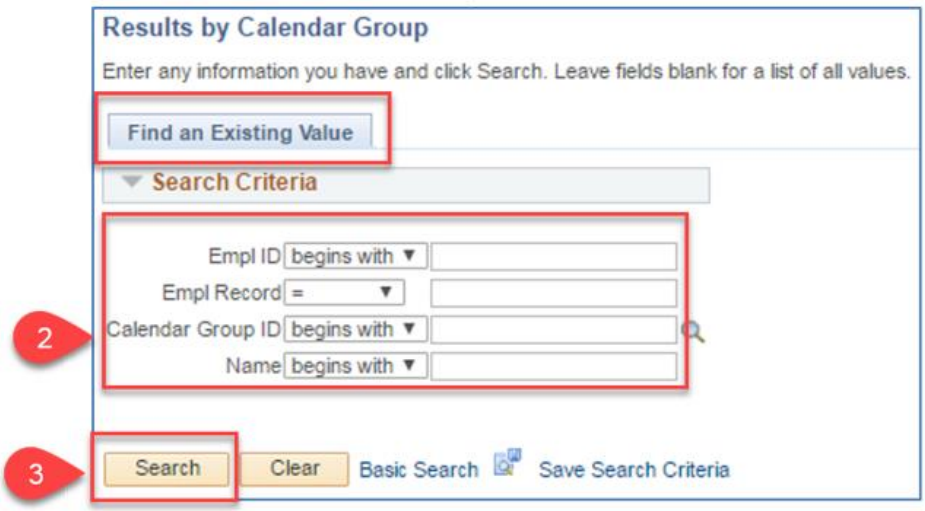
When the Absence Eligibility Group is updated as the result of a FLSA change, the employee's absences will need to be manually adjusted.

STEP 1: Manually calculate the employee's new vacation entitlement for the year based on the effective date of the FLSA change using the Manual Conversion Table.

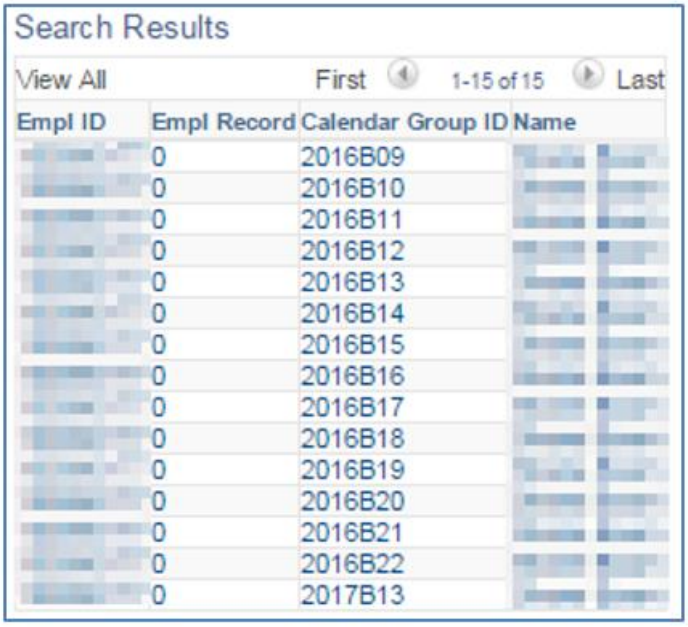
STEP 2: Obtain the vacation award for the employee affected by reclassification

1. Navigate to the Results by Calendar Group page:
   Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info >Results by Calendar Group

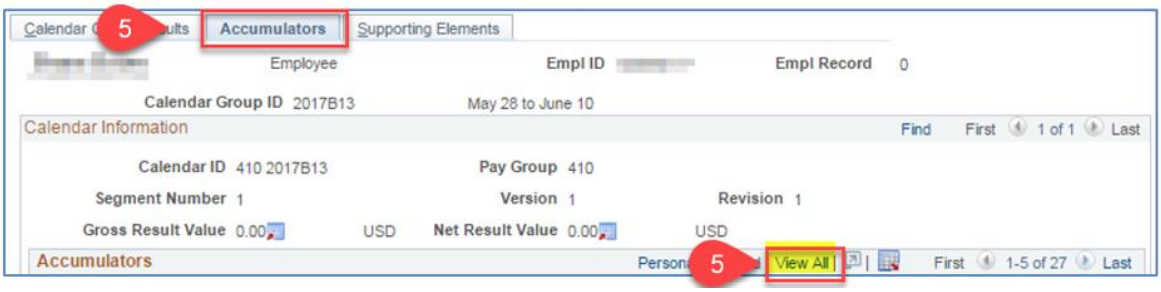
2. Enter the desired search criteria in the Find an Existing Value tab



3. Click Search



4. From the Search Results grid, select the calendar group row for the last pay period that was finalized
5. Click the Accumulators tab (click "View All" for the entire listing)



6. Locate the Vacation Award (WI_VACATION_ENT)

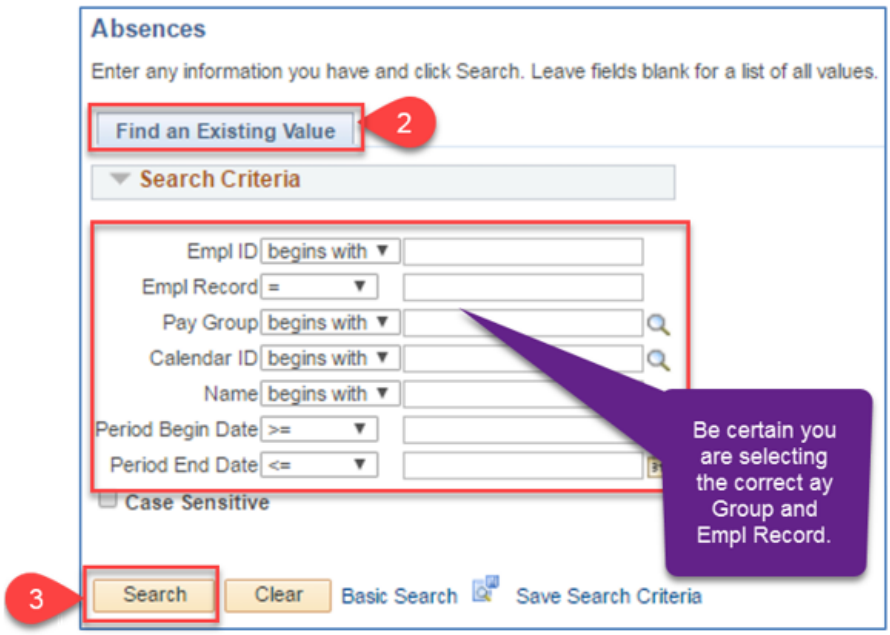


STEP 3: Adjust the employee's vacation balance.

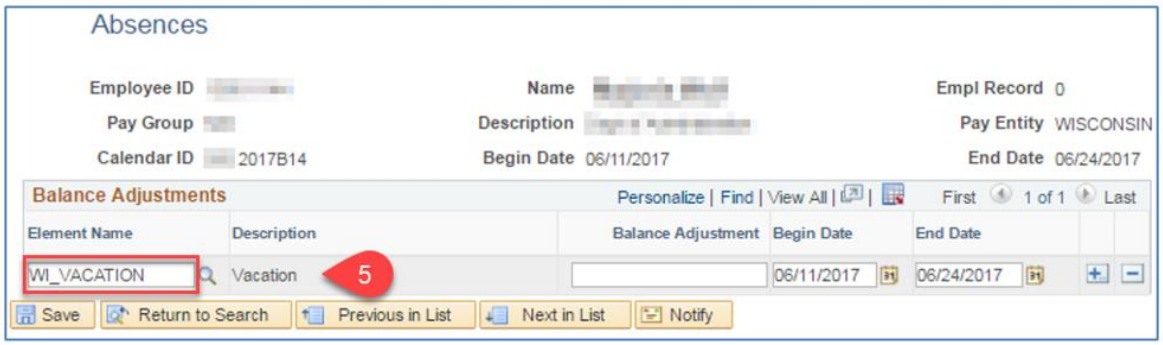
1. Navigate to the Absences page

Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

2. Enter the desired search criteria in the Find an Existing Value tab



3. Click Search
4. Select the Calendar ID that coincides with the effective date of the FLSA change
5. On the Absences page, enter or select the WI_VACATION Element Name



6. To determine the Balance Adjustment amount, take the manual vacation entitlement calculated in Step 1 and subtract the acation Award from Step 2. The difference is your balance adjustment, positive or negative
7. Click Save

Checklist: Reclassifcation / Reallocation

Name: _____ Empl ID: _____

Important

First check position data and job data – are there any effective-dated rows with a date that is later than the effective date of the reclassification/reallocation to be entered?

- If Yes - STOP. Enter a ticket to have the SSO process the reclassification.
- If No - Continue to process the reclassification with the checklist below.

☐ UPDATE POSITION

Role: *Position Management Specialist*

- Navigation: **Main Menu** > **State of Wisconsin (STAR)** > **Human Resources** > **Process** > **WI Position Requests** > **WI Position Request Home**
- Enter job code updates to position and update FLSA status, if necessary.

☐ PEOPLESOFT ENTERS POSITION CHANGE - JOB RECLASSIFCATION/REALLOCATION JOB DATA ROW

- PeopleSoft adds a row to the job data automatically based on the position update.

☐ UPDATE COMPENSATION

Role: *Agency HR Specialist*

- Navigation: **Main Menu** > **Workforce Administration** >**Job Information** > **Job Data (Compensation Tab)**
- Enter a job data row for the compensation change.

If the reclassification did NOT include a change to FLSA status, the process is complete. Click **Save**.

If the reclassification DID include a change to FLSA status, continue with the following steps.

☐ UPDATE ABSENCE ELIGIBILITY (IF APPLICABLE)

Role: *Agency HR Specialist*

- Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data (Payroll Tab)**

- Using the same job data row added for the compensation change, update the absence eligibility field to correspond with the new FLSA status.

UPDATE WORKGROUP (IF APPLICABLE)

Role: *Agency HR Specialist or Time and Labor Specialist*

- Navigation: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data (Employment Data link, Time Reporter Data)**
- Using the same job data row added for the compensation change, update the workgroup to correspond with the new FLSA status.

OR

- If using the Time and Labor specialist role rather than HR Specialist, the Time and Labor Data can be accessed through the following navigation: **Main Menu** > **Time and Labor** > **Enroll Time Reporters** > **Maintain Time Reporter Data**

ADJUST ABSENCE BALANCES

Role: *Agency Absence Specialist*

- Navigation: **Main Menu** > **Global Payroll & Absence Mgmt** > **Absence and Payroll Process** > **Review Absence/Payroll Info** > **Results by Calendar Group** Navigation: **Main Menu** > **Global Payroll & Absence Mgmt** > **Payee Data** > **Adjust Balances** >**Absences**
- Adjust vacation balances to reflect prorated amount based on FLSA change.

Resources

- Ch. ER 3, Wis. Adm. Code
- WHRH 370

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3.4 Maintain Person Profile

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

3.3.4.1 Maintain Person Profile



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3.5 Personnel FIle (P-File)

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

3.3.5.1 Electronic Personnel File (P-File)

Overview
Security
Viewing a P-File Within Your Agency (Row Level Security)
Maintaining A P-File
- Adding Documents
- Modifying Document Effective Date And/Or Business Unit
- Moving Documents To A Different P-File Section
- Moving Document To Another Employee's P-File
- Deleting Documents

Restricting Access To A P-File
Requesting Access To A P-File (Checking Out A P-File)
Approving A P-File Check Out Request
Printing Documents
- Printing An Entire P-File
- Printing One Or More Sections Of A P-File
- Printing One Or More Documents Within A Section

P-File Audit Query
FAQs
P-File Document Naming
Resources

Overview

Electronic personnel file functionality was added to STAR HCM on February 1, 2017. Personnel file documents created on or after 02/01/2017 shall be scanned or created in electronic PDF format by the agency and be uploaded into STAR HCM by the designated agency representative. The documents will be indexed according to the appropriate document category as provided under WHRH Chapter 180.

Additional information related to electronic storage of State employees' official personnel file can be found in DPM policy bulletin DPM-0437-AO/MRS.

Security

Users must have one or more personnel file security roles to access this functionality. Who the user can see is based on their row-level security (typically their business unit or a subset of their business unit). Users are not able to view their own P-File.

Role Name	Usage
P-File Viewer	View-only access to P-Files
P-File User	Views P-File, adds documents, moves documents, requests deletions, prints documents
P-File Restricted Access	Ability to flag agency P-Files as restricted. Marking a file as restricted will make the employee's P-File non-viewable to the general P-File user within the agency. Use of this feature is at an agency's discretion. This role can also view documents, add documents, move documents, request deletions, and print documents from a restricted file.
P-File Requestor	Ability to request checkout of P-File s from another agency
P-File Approver	Record custodian - approves checkout request from another agency to view P-Files
P-File Maintenance	DPM Enterprise Only. Role used to hard delete documents from a P-File .

Viewing a P-File Within Your Agency (Row Level Security)

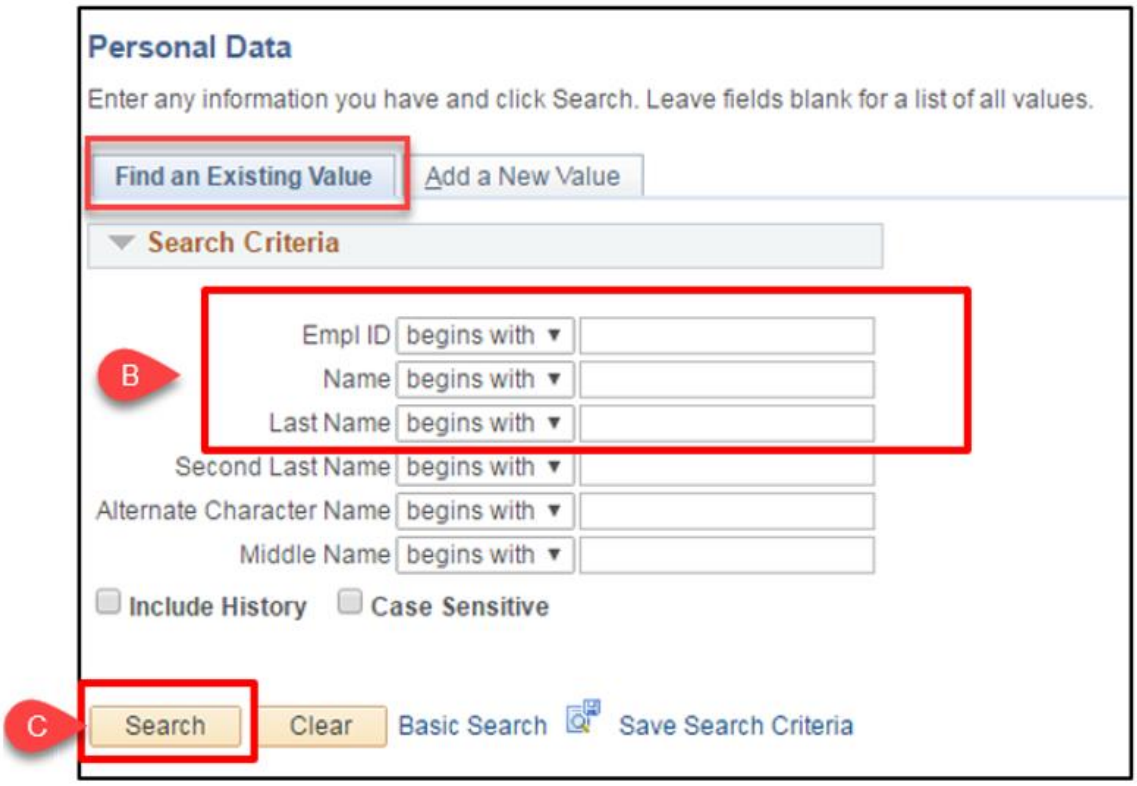
Roles:

- For General P-Files: P-File User or P-File Viewer
- For Restricted P-Files: P-File Restricted Access

Use the following steps to view an employee's P-File.

STEP 1: Navigate to the Personal Data page

A. Navigation: Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person
B. On the Find an Existing Value tab, enter the employee's name or ID
C. Click Search

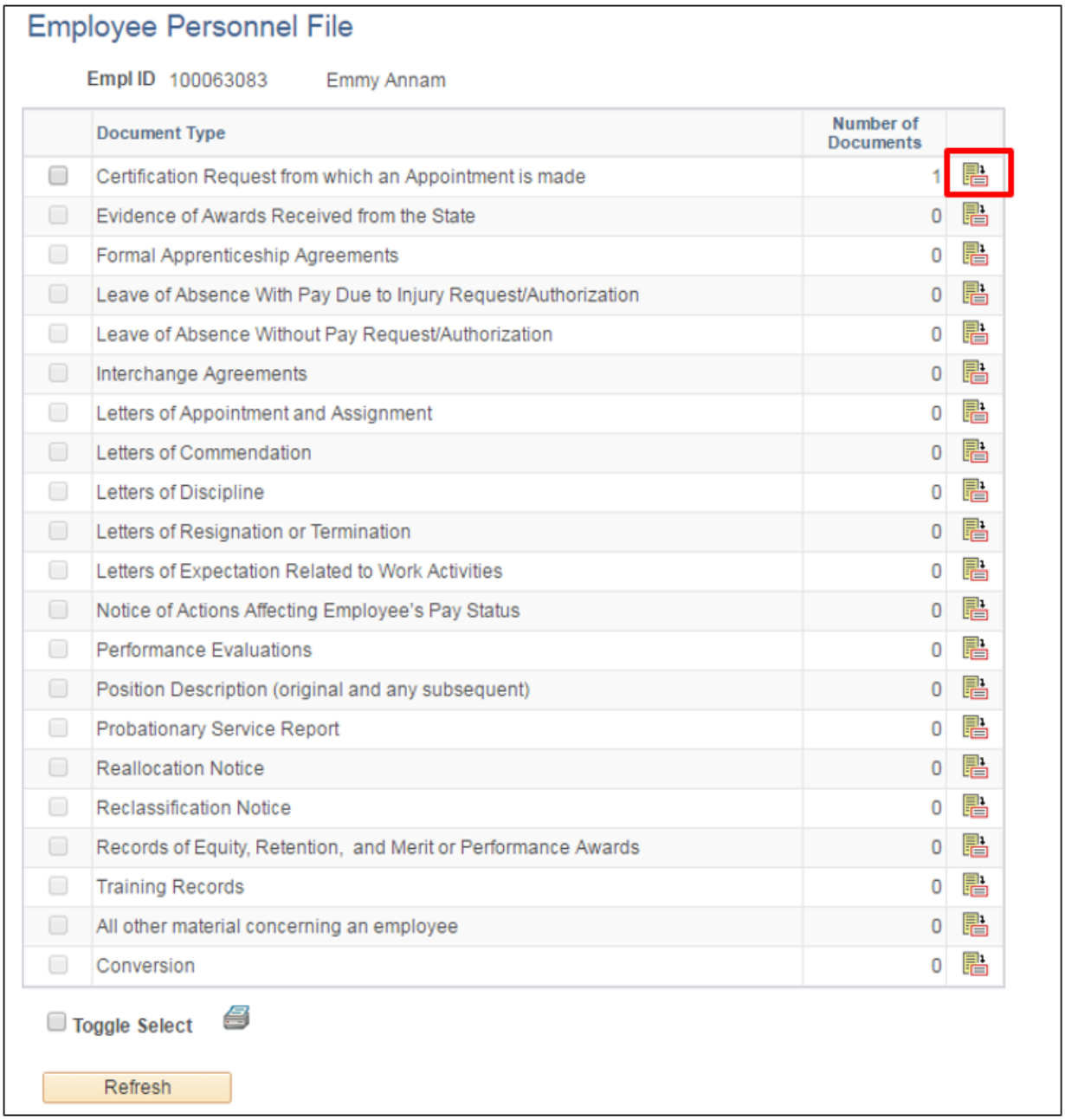


STEP 2: Select the Wi Personal Data tab, and click on the P-File button



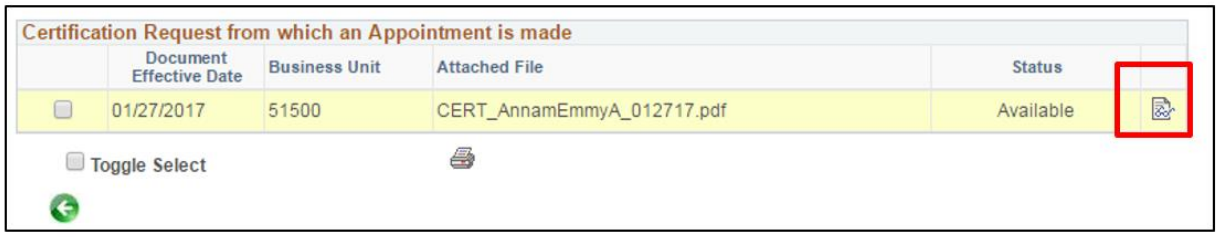
The P-File button will be greyed out for your own P-File and for certain empl classes that don't have P-Files. Additionally, if the file has been marked as restricted, it will be greyed out if you don't have the security role to view restricted P-Files.

STEP 3: Click the yellow paper icon next to P-File section where the document is located.



Only sections with documents in them are selectable with the P-File Viewer security role.

STEP 4: Click the white paper icon next to document you want to view



STEP 5: Close the new window to return to the P-File.

STEP 6: Return to the first screen of the P-File. Click the on-screen green arrow. Do NOT use the browser back button.



Maintaining A P-File

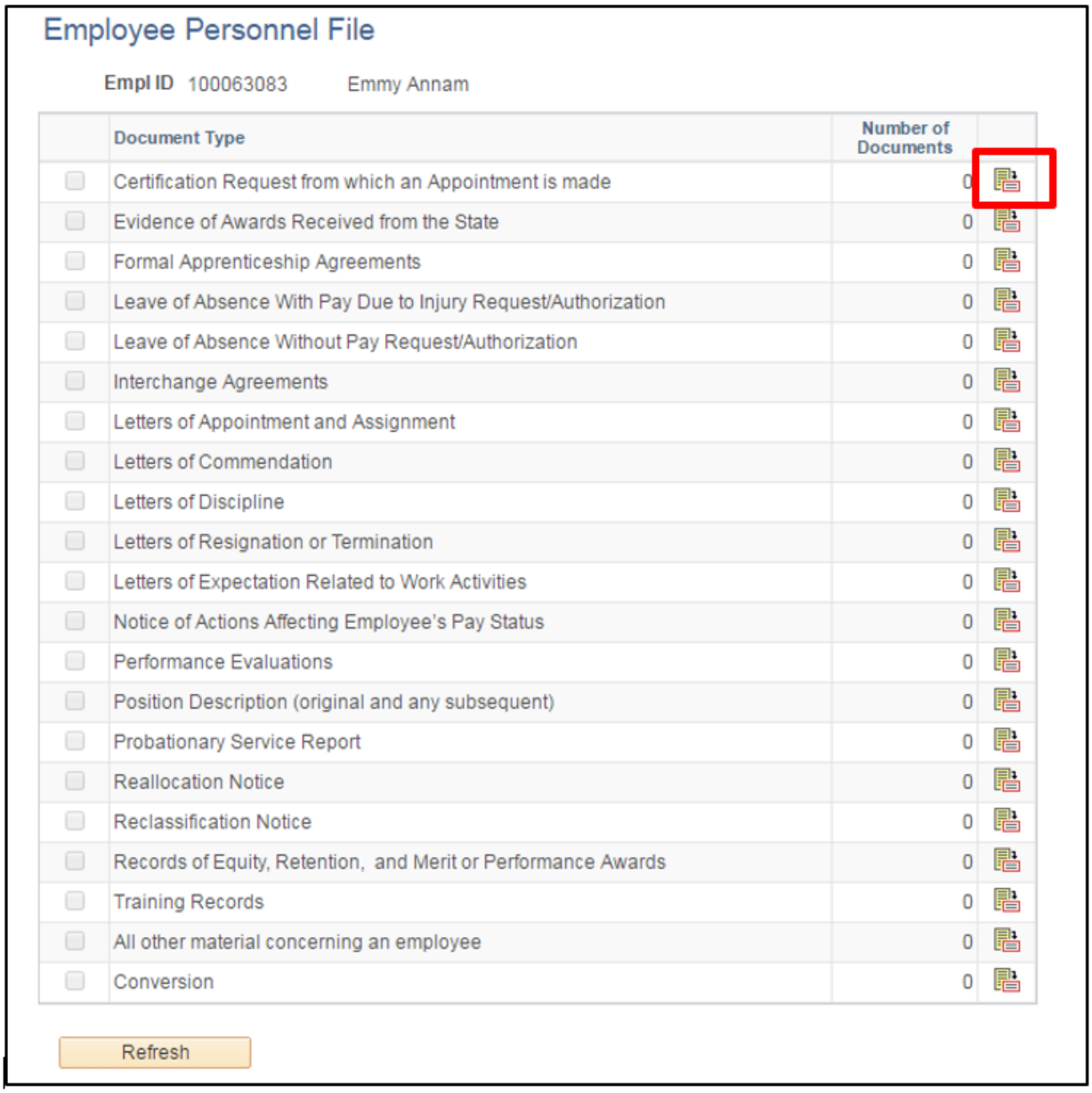
Roles:

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

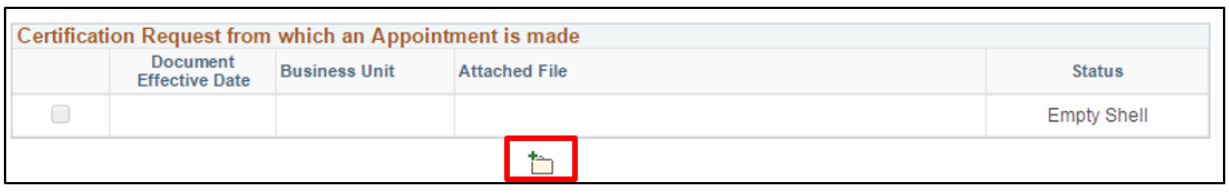
Adding Documents

STEP 1: Navigate to the employee's P-File
See Viewing a P-File for instructions on how to get to a P-File

STEP 2: Click the yellow paper icon next to the applicable P-File section



STEP 3: Click the file folder icon



STEP 4: Enter details about the document being uploaded

A. **Document effective date**: The effective date of the document

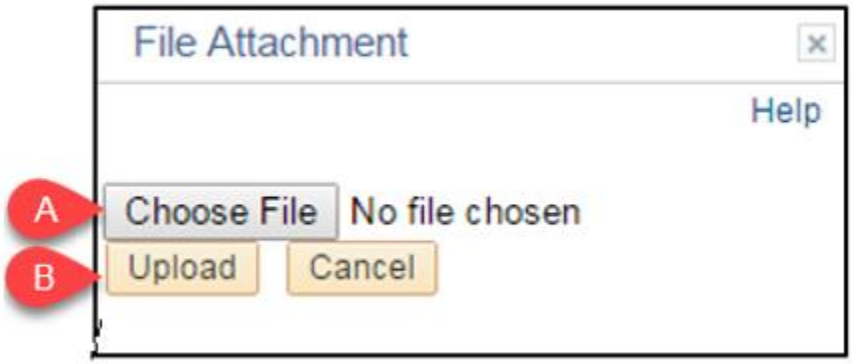
B. **Business Unit:** The employee's agency as it relates to the document being uploaded
C. Click **Upload Document**



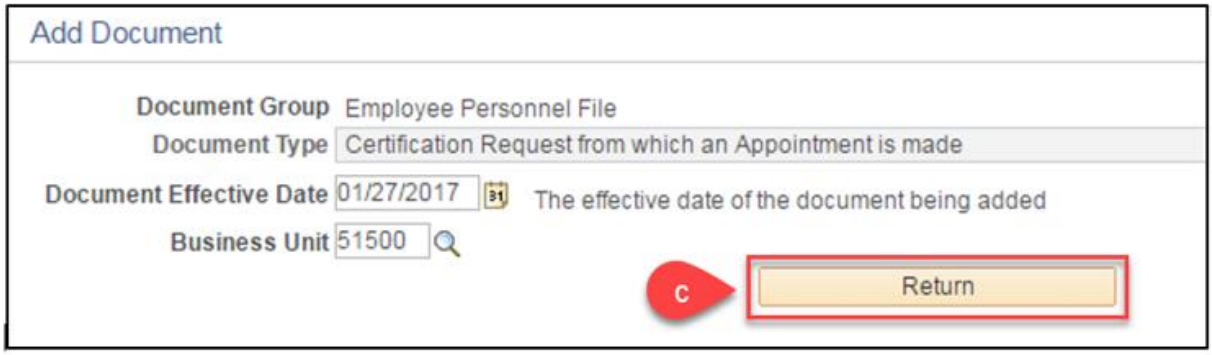
STEP 5: Select the document to be uploaded.

All documents must follow a standard naming convention. The naming conventions are detailed in the Appendix.

A. Click Choose File and select the document to upload
B. Click Upload



C. Click Return



The document is now in the P-File:



STEP 6: Returning to the first screen of the F-File

Click the on-screen green arrow. Do NOT use the browser back button.



Modifying Document Effective Date And/Or Business Unit

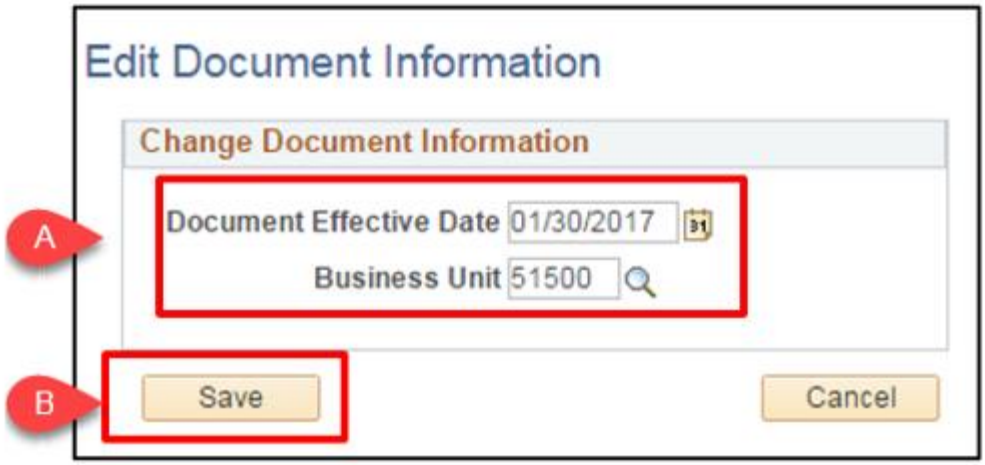
Roles:

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

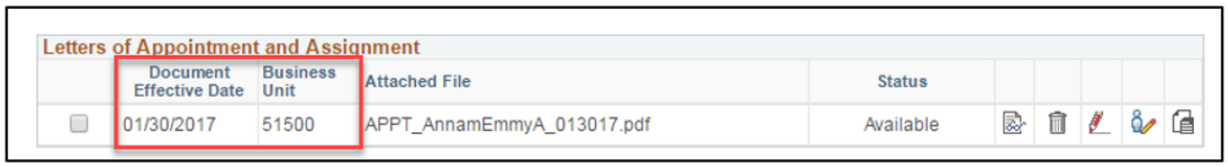
STEP 1: Navigate to the employee's P-File
STEP 2: Navigate to the document that needs modification
STEP 3: Click on the red pencil icon next to the document that needs the effective date or business unit changed



A. Enter the correct Document Effective Date and/or Business Unit
B. Click Save



The document effective date and business unit are now updated:

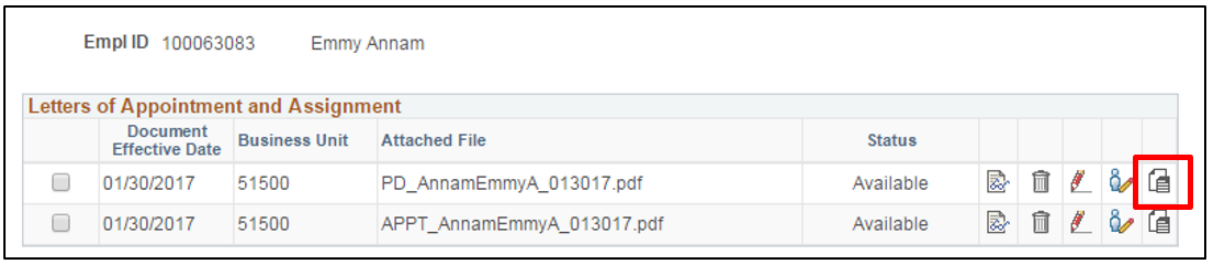


Moving Documents To A Different P-File Section

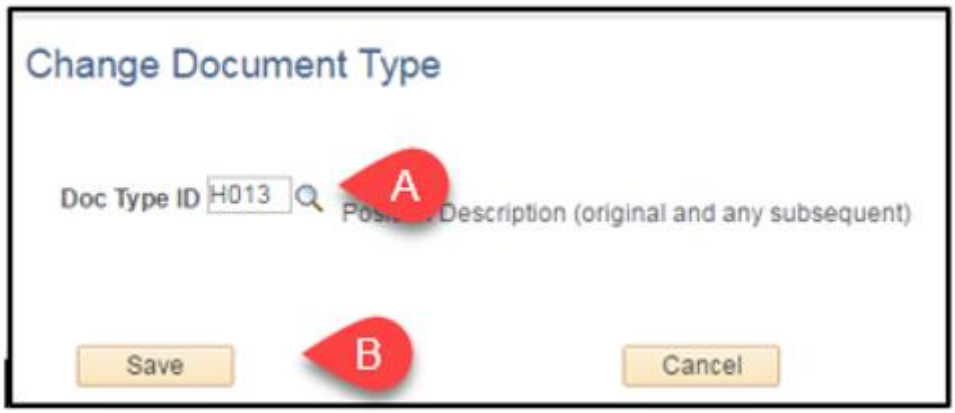
Roles:

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

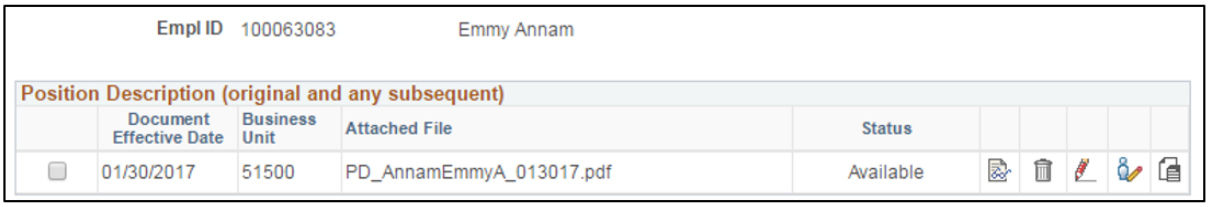
STEP 1: Navigate to the employee's P-File
STEP 2: Navigate to the document that needs modification
STEP 3: Click on the white and grey paper icon next to the document that needs to be moved to a different section



A. Click the magnifying glass icon to select the correct section (Doc Type ID)
B. Click Save



The document is now in the correct P-File section:



Roles:

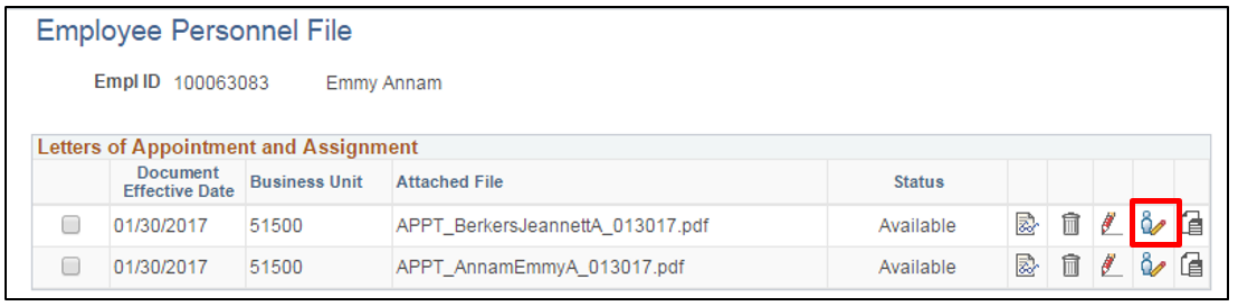
Moving Document To Another Employee's P-File

Roles:

- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

STEP 1: Navigate to the employee's P-File
STEP 2: Navigate to the document that needs modification
STEP 3: Click on the blue person icon next to the document that needs to be moved to another employee's P-File

Users will only be able to move documents to another user within their agency (row level security).



A. Enter the Employee ID
B. Click Reassign Document

- To search for an employee ID, click the magnifying glass next to the Assign to field



The document will be moved from the incorrect employee's file to the correct employee's personnel file:



Deleting Documents

Roles:

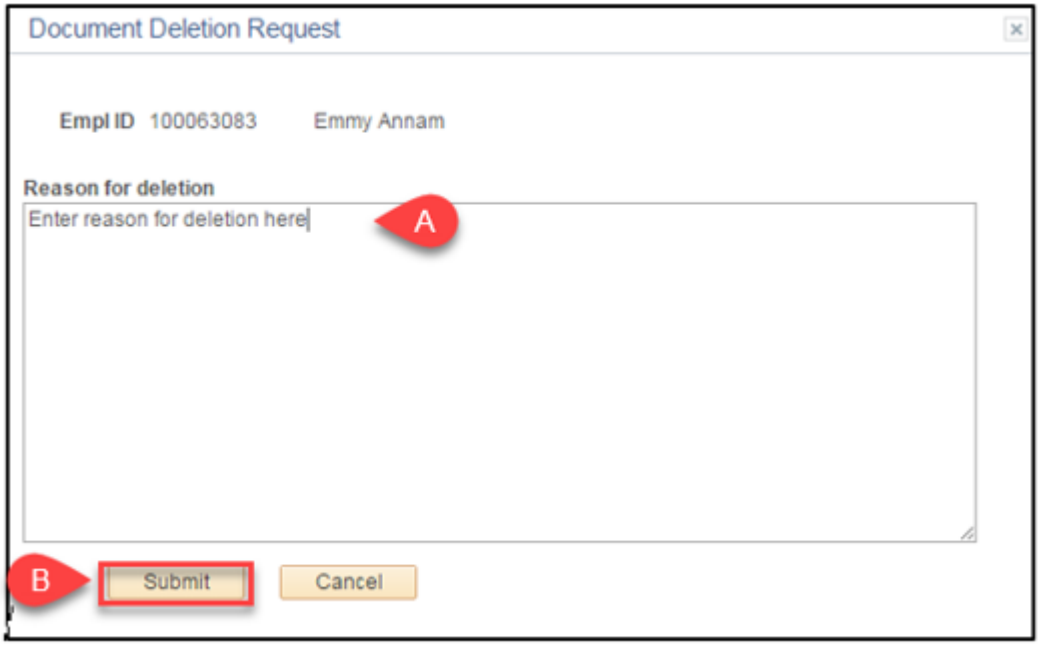
- For General P-Files: P-File User
- For Restricted P-Files: P-File Restricted Access

Document deletion requests are routed to DPM for approval.

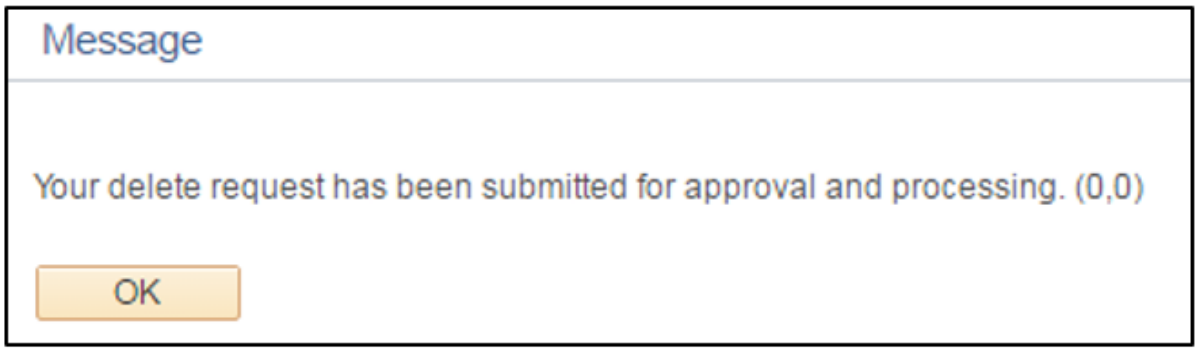
STEP 1: Navigate to the employee's P-File
STEP 2: Click the yellow paper icon next to P-File section where the document is located
STEP 3: Click the trash can icon next to the document that should be deleted



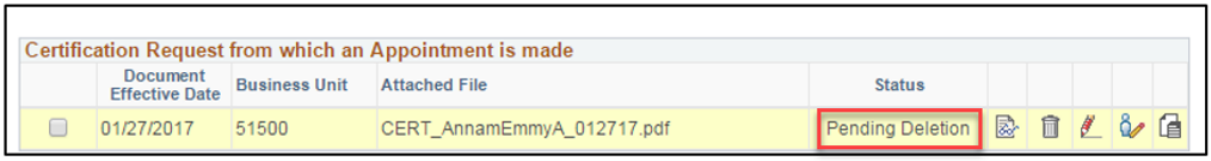
A. Enter the reason for the deletion request
B. Click Submit



You will receive notification that your document deletion request was sent to DPM. Additionally, an email will be sent to DPM notifying them of the deletion request.



The document status will show as “Pending Deletion” until the deletion request is either approved or denied by DPM.



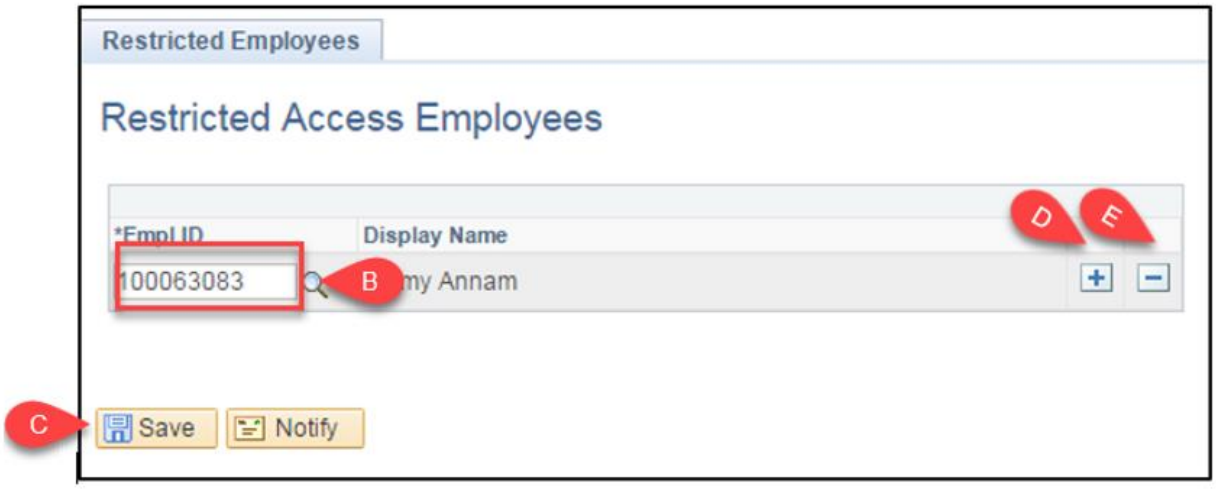
Restricting Access To A P-File

Role: P-File Restricted Access

Use the following steps to mark an employee’s P-File as restricted.

STEP 1: Navigate to the Restricted Access Employee page

A. Navigation: **State of Wisconsin (STAR) > Human Resources > Setup > Document Setup > Restricted Access Employees**
B. Enter or search for the employee’s ID by clicking the magnifying glass
C. Click Save
D. To add additional employees, click the plus (+) sign and repeat the steps above.
E. To remove employees, click the minus button, and click save.



An employee's P-File will remain restricted when they *transfer* to a different agency. The receiving agency should remove the employee from the list of restricted employees if the restriction is not applicable to their agency.

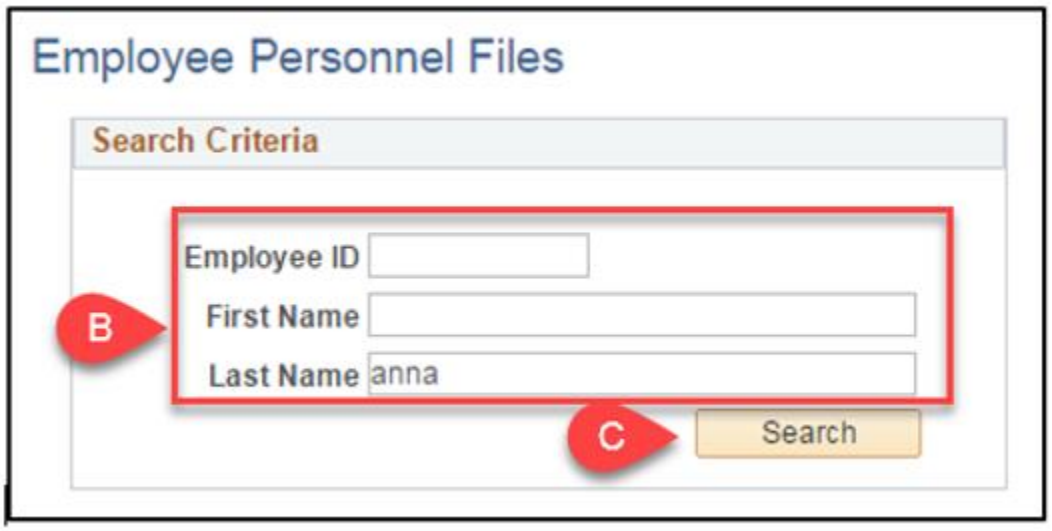
Requesting Access To A P-File (Checking Out A P-File)

Role: P-File Requestor

Use the following steps to request view-only access to a P-File at another agency.

STEP 1: Navigate to the Employee Personnel File page

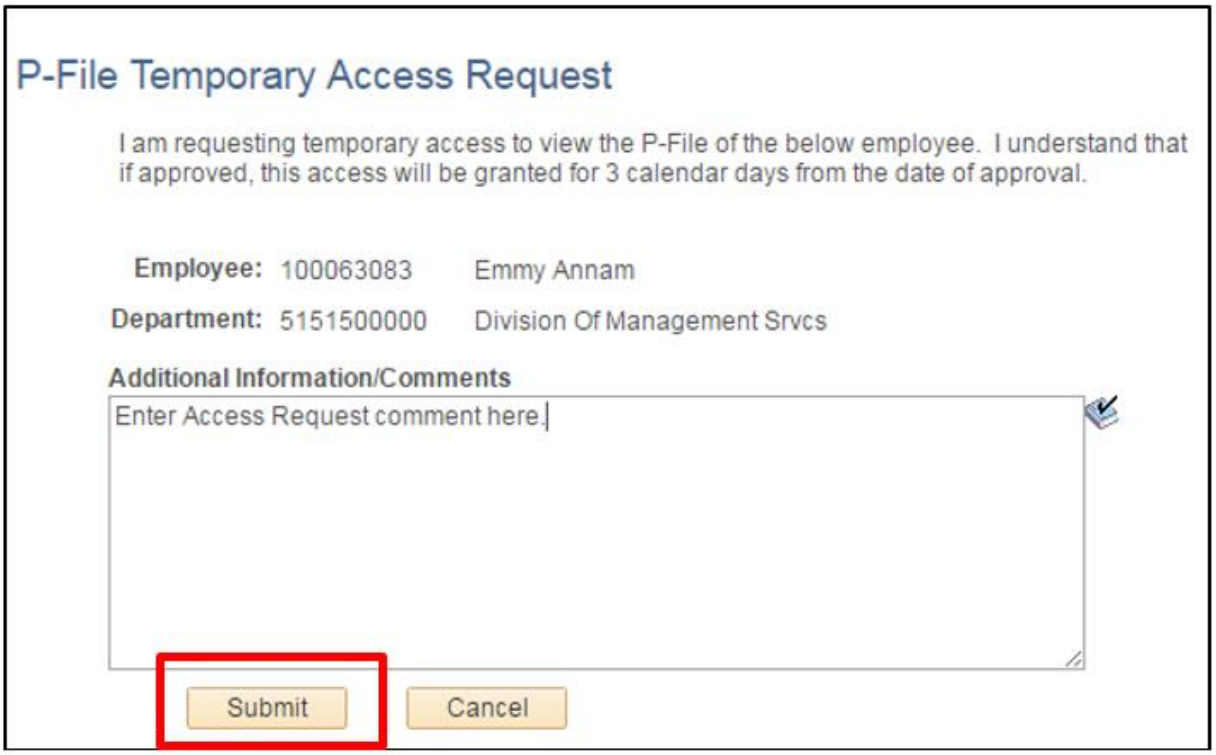
A. Navigation: **State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File**
B. Search for an employee by entering all or part of the employee's Employee ID, First Name, or Last Name.
C. Click Search



STEP 2: Click Request Access next to the applicable employee

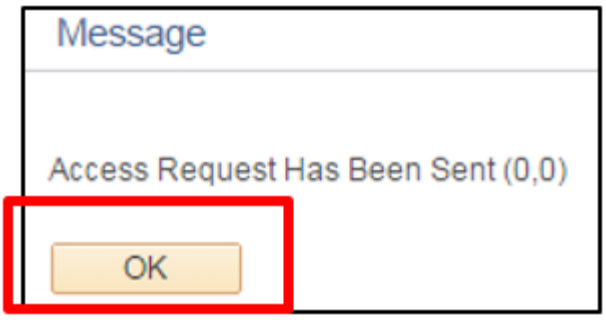


A. Enter a comment and click Submit



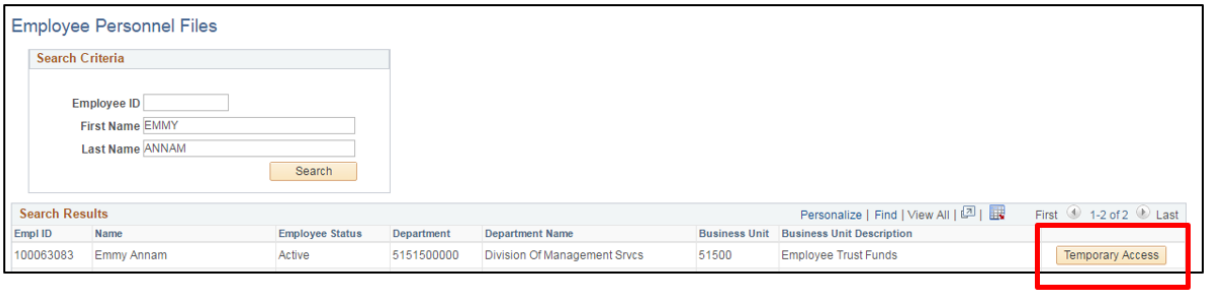
You will receive confirmation that the request has been sent. Additionally, an email will be sent to all users with the P-File Approver role at the employee's agency.

B. Click OK



Once you've receive an email stating that your request has been approved, you may view the P-File through the same navigation: **Main Menu > State of Wisconsin (STAR) > Human Resources > Process > Document Management > Employee Personnel File**

C. Click the Temporary Access button to view the employee's P-File.



You will have 3 calendar days to review the P-File after the request is approved. If additional time is needed, a new request must be submitted.

Approving A P-File Check Out Request

Role: P-File Approver

Use the following steps to approve view-only access request to a user outside your agency.

STEP 1: Navigate to the Employee Personnel File page

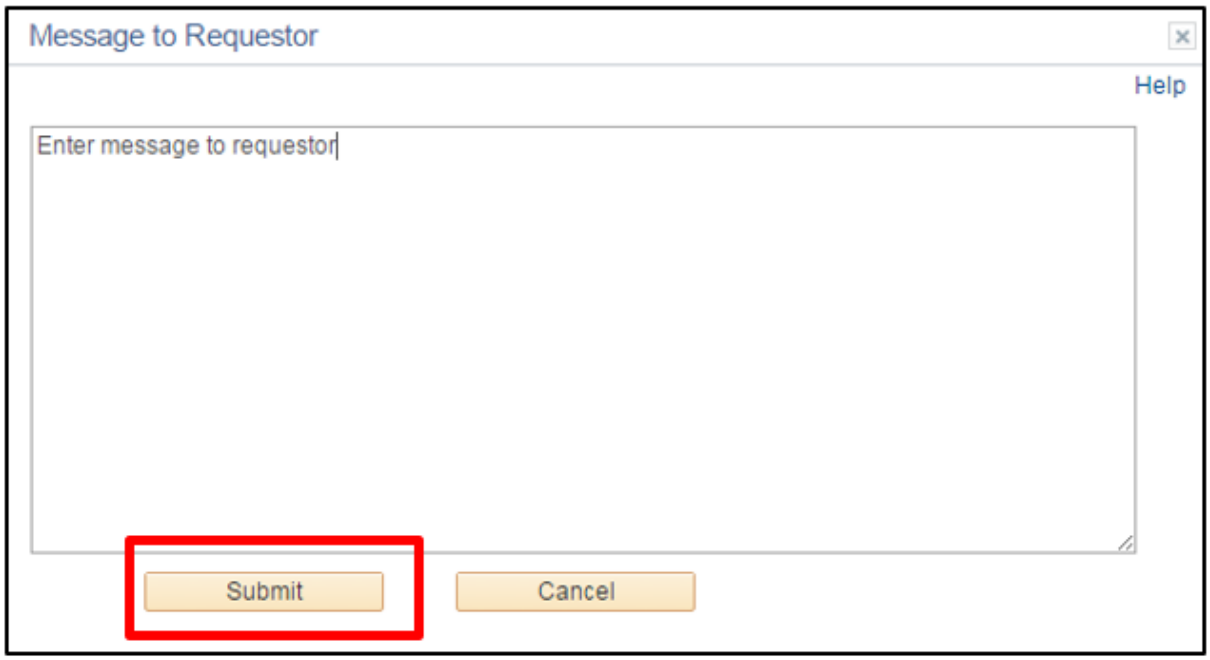
Navigation: **State of Wisconsin (STAR) > Human Resources > Process > Document Management > Approve/Deny P-File Access Requests**
All pending P-File access requests will be automatically displayed.



STEP 2: To Approve the access request, Click the green checkmark icon to the right of the request. To Deny the access request, Click the red symbol to the right of the request.



STEP 3: Enter a message to the requestor and click Submit.



An email will be sent to requestor notifying them of the approval or denial.

Printing Documents

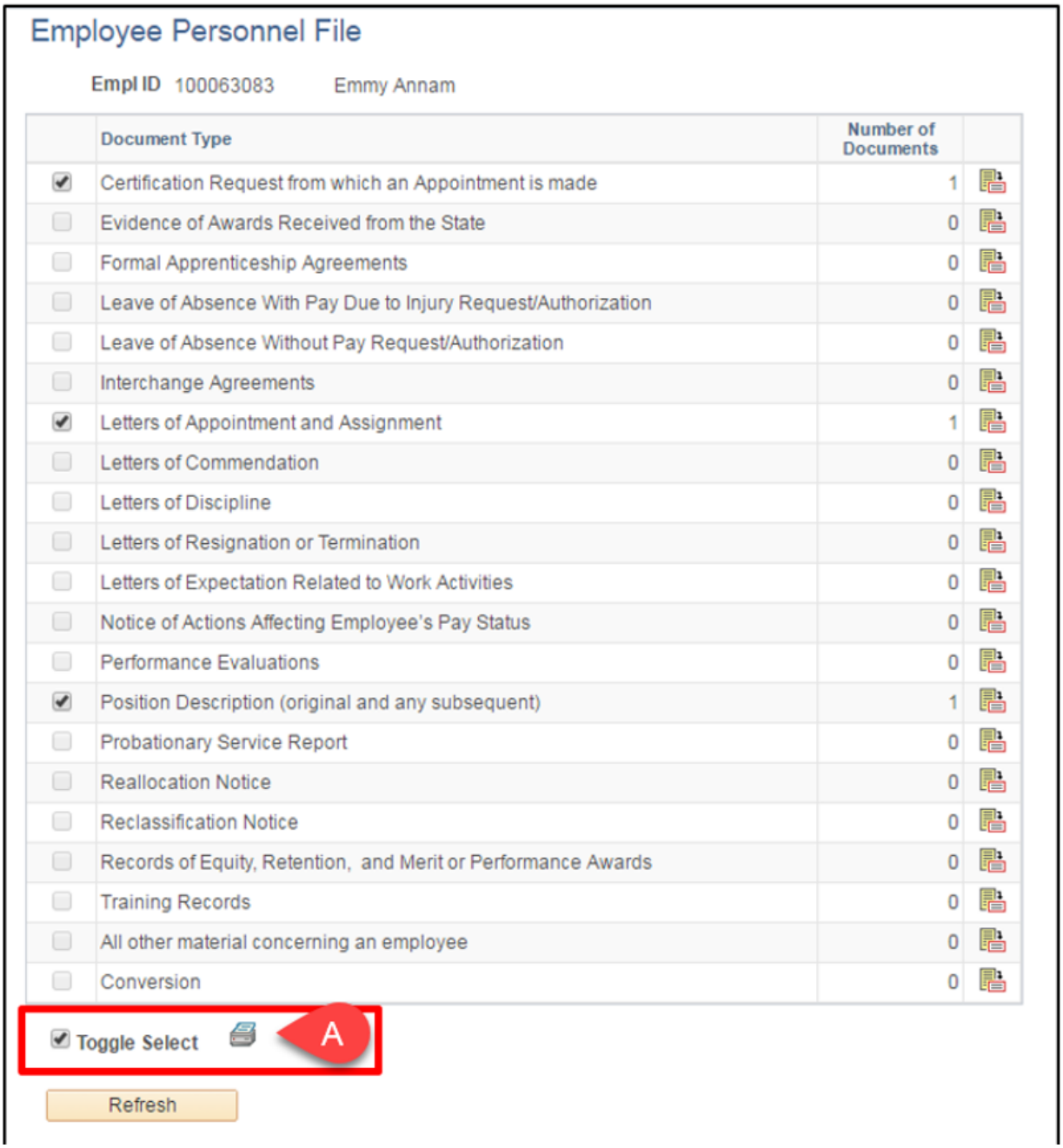
Roles:

- For General P-Files: P-File Viewer, P-File User
- For Restricted P-Files: P-File Restricted Access

Printing An Entire P-File

STEP 1: Navigate to the employee's P-File.
STEP 2: Click the Toggle Select option to select all sections in a P-File that have documents.

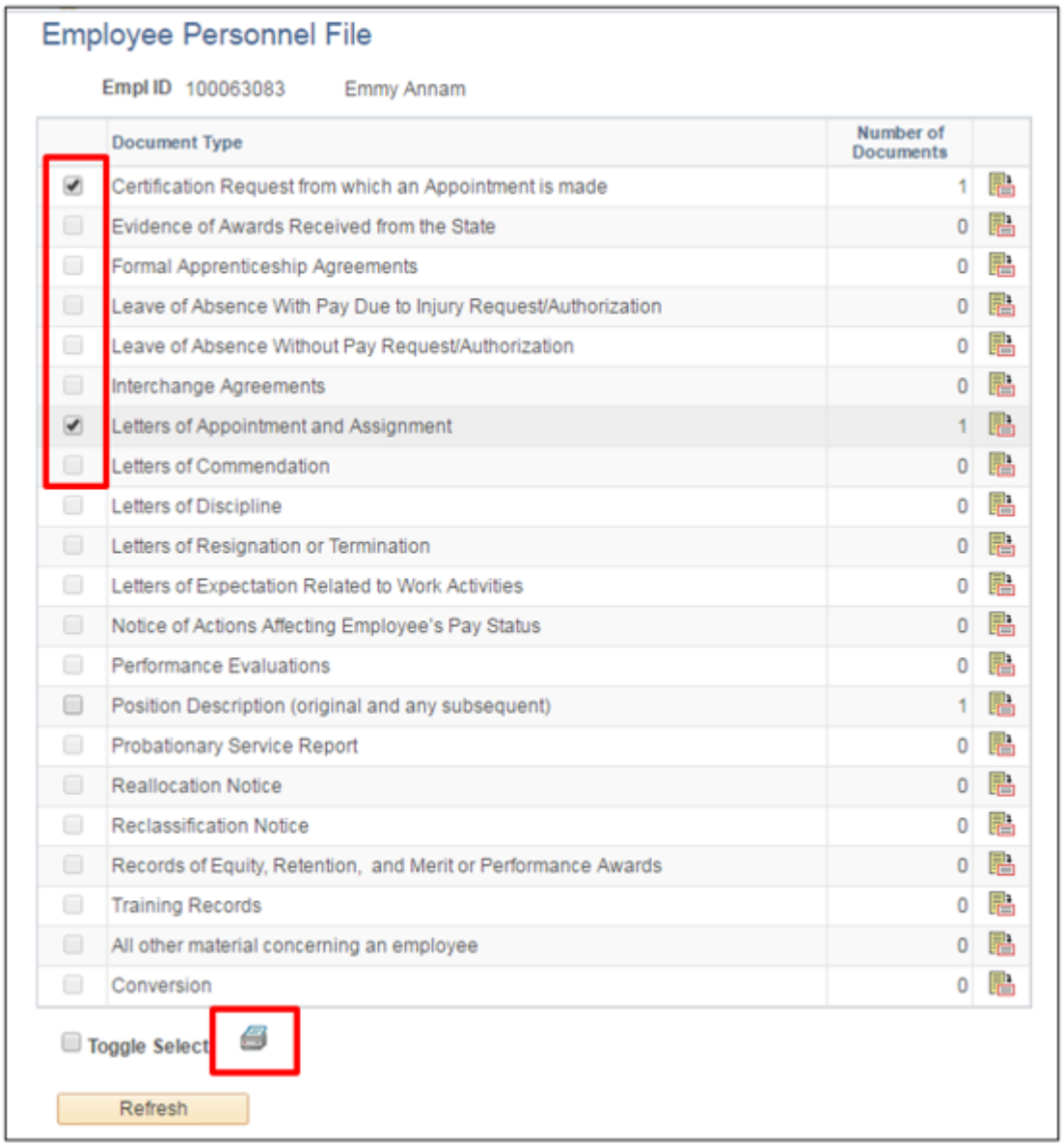
- Click the print icon.



The documents will open as a single .pdf document with a cover sheet in a separate window.

Printing One Or More Sections Of A P-File

STEP 1: Navigate to the employee's P-File.
STEP 2: Click the checkbox next to all sections in a P-File that you want to print.
STEP 3: Click the print icon.



The documents will open as a single .pdf document with a cover sheet in a separate window.

Printing One Or More Documents Within A Section

STEP 1: Navigate to the employee's P-File.
STEP 2: Click the yellow paper icon next to P-File section where the document is located.
STEP 3: Click the checkbox next to document(s) you want to print.
STEP 4: Click the print icon.



The documents will open as a single .pdf document with a cover sheet in a separate window.

P-File Audit Query

All users will have access to the query, but users must have access to the data to produce query results.

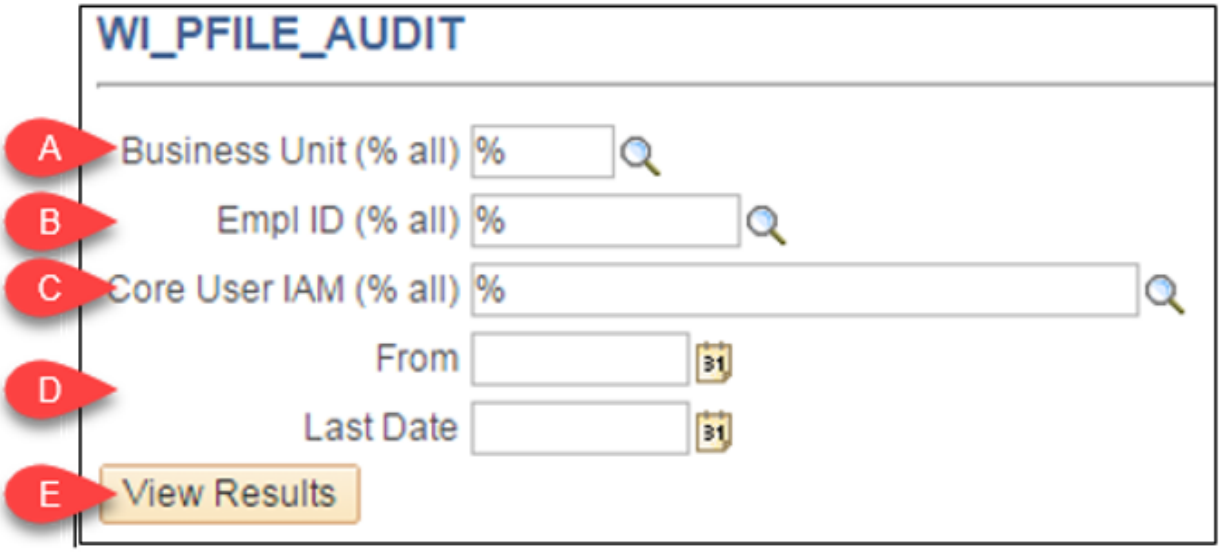
General information on how to run a query can be found in the How To Run Reports and Queries Job Aid.

STEP 1: Navigate to Query Viewer and enter the name of the query

A. **Main Menu > Reporting Tools > Query > Query Viewer**
B. STAR developed a query to return all data associated with disciplinary actions tracked in STAR HCM. The name of the query is **WI_PFILE_AUDIT**

STEP 2: Enter the search criteria

A. **Business Unit:** Enter a business unit to return results for a specific agency. To return all business units, enter a percentage sign (%).
B. **Employee ID:** Enter an employee ID to return results for a specific employee. To return all employees, enter a percentage sign (%).
C. **Core User IAM:** Enter an IAM to return results for a specific P-File user. To return all P-File users, enter a percentage sign (%).
D. **From Date and To Date:** Enter a date range. This date is based on the document effective date.
E. Click **View Results**



STEP 3: Interpreting the query results

A. **ID:** Employee ID associated with a P-File
B. **Personnel File:** Name of employee associated with a P-File
C. **Unit:** Business Unit number
D. **Business Unit Description**: Description of Business Unit
E. **Doc Group ID:** At this time, it will always be PFILE
F. **Doc Type ID:** Short description of the P-File section
G. **Doc Description:** Long description of the P-File section
H. **Seq Number:** Document order within the P-File section
I. **Doc Effective Date:** Effective date of the document
J. **Document Status:** Available, Pending Deletion, Deleted
K. **Attachment:** Name of document
L. **Creation Date/Time:** Timestamp of when the document was originally uploaded
M. **Document Created By:** IAM of user who uploaded document
N. **Last Update Date/Time:** Timestamp of the most current change to the document
O. **Document Last Updated By:** IAM of user who last updated the document
P. **Document Action Date/Time:** Timestamp of the document action
Q. **Document Actions:** Deleted, Added, Viewed, Printed
R. **Document Action By:** IAM of user who deleted, added, viewed, or printed a document

FAQS

Multiple Jobs

- When an employee has appointments at two separate agencies, who can view the employee's P-File?

  A P-File is tied to a particular employee, and access to a P-File is based on who has row level security to view the employee within PeopleSoft HCM. Both agencies will have access to view all documents in the employee's P-File.

- When an employee has appointments at two separate agencies, which agency will receive and approve P-File checkout requests?

  Both agencies will receive the checkout request, but the system requires only one agency to respond by either approving or denying the request.

- When an employee has appointments at two separate agencies, how will restricted access be handled?

  An employee's P-File cannot be restricted at just one agency when they have appointments at two separate agencies. If their P-File is marked as "restricted" by one agency, it will be marked as "restricted" at both agencies.

Employee P-File Review

- How will an employee view their P-File once it is fully digitized?

  Make a paper copy for the employee to review, or meet with the employee to show the electronic version. A future enhancement is being planned to allow employee to have electronic access to their P-Files.

Termed Employees

- What happens to an employee's P-File when they leave state service?

  The electronic file will remain in the system, and it will remain accessible to the agency where the employee was last active. If the employee is rehired, the P-File will move with the employee and be accessible to the new agency. If a file needs to be uploaded after an employee has been terminated, a person with the P-File Restricted Access role will be able to upload the document.

Purging

- If an employee does not return to state service within 8 years, what happens to their electronic P-File?

The electronic P-File will be purged from PeopleSoft in accordance with the RDA.

Emails

- What transactions will generate an automatic email notification?

Six transactions will generate an automatic email notification: P-File check out requests, notification that a P-File check out request has been approved, notification that a P-File check out request has been denied, P-File document deletion request, notification that a P-File document deletion request has been approved, and notification that a P-File document deletion request has been denied.

Errors

- Should I request a deletion if I uploaded a document with the incorrect name?

Depends – If the document is generally named correctly or the date is close, there is no need to request a deletion. If the document name is completely incorrect, request deletion.

- How should amended documents be handled?

If a particular document has been amended, the original should remain in the section. The updated document should be titled the same as the original with "_AMD" at the end of the name.

Sections With Multiple Documents

- How do I differentiate between different documents within the "OTHER" category?

Some section of the P-File may contain a variety of documents. When uploading documents into a section and additional differentiation is desired, include qualifying language in the name after the document type.

Example:

a. OTHER_OutsideEmpl_SmithTroyJ_022217
b. DISC_1DAY_SmithTroyJ_022217

Documents Missed During Conversation

- What should I do with a document that was effective prior to conversion but not included in the uploaded file?

If a P-File document with an effective date prior to 2/1/2017 is identified after the employee's legacy file has been uploaded, the document should be given the appropriate name from the naming conventions found in the Appendix but should be uploaded into the "Conversion" section of the P-File.

P-File Document Naming

Documents uploaded to an employee's electronic P-File will use the following naming conventions:

P-File Section	Naming Convention	Date Used
A Certification Request from which an appointment is made	CERT_LastNameFirstNameMI_mmddyy	Effective Date of Appt
Evidence of awards received from the State	AWARD_LastNameFirstNameMI_mmddyy	Date of Award
Formal apprenticeship agreements	APPRENT_LastNameFirstNameMI_mmddyy	Date of Agreement
Leave of Absence With Pay Due to Injury Request/Authorization	LOAWP_LastNameFirstNameMI_mmddyy	Date Leave Begins
Leave of Absence Without Pay Request/Authorization	LOAWOP_LastNameFirstNameMI_mmddyy	Date Leave Begins
Interchange Agreement Notice	INCHG_LastNameFirstNameMI_mmddyy	Date Interchange Begins
Letters of appointment and assignment	APPT_LastNameFirstNameMI_mmddyy	Effective Date of Appt
Letters of commendation	COMMEND_LastNameFirstNameMI_mmddyy	Date Letter Issued
Letters of discipline	DISC_LastNameFirstNameMI_mmddyy	Date of Letter
Letters of resignation/termination	RESIGN_LastNameFirstNameMI_mmddyy TERM_LastNameFirstNameMI_mmddyy	Resignation or Termination Date
Letters of expectation related to work activities	EXPECT_LastNameFirstNameMI_mmddyy	Date of Letter
Notice of actions affecting employee's pay status	PAYACT_LastNameFirstNameMI_mmddyy	Effective Date of Change

Performance Evaluations	PERFEVAL_LastNameFirstNameMI_mmddyy	Date Review was Completed
Position Description (original and any subsequent)	PD_LastNameFirstNameMI_mmddyy	*Effective Date of Appt for new PDs *Date of Sup Signature for revised PDs
Probationary Service Report (former title) or probationary performance evaluations and letters related to the results of the employee's probationary period(s) or trial period.	PROB_LastNameFirstNameMI_mmddyy	Date Review was Completed Date of Letter
Reallocation Notice	REALLO_LastNameFirstNameMI_mmddyy	Effective Date of Reallocation
Reclassification Notice	RECLASS_LastNameFirstNameMI_mmddyy	Effective Date of Reclassification
Records of equity, retention, and merit or performance awards	ERMPREC_LastNameFirstNameMI_mmddyy	Date of Award
Training records	TRAIN_LastNameFirstNameMI_mmddyy	Date Training Completed – If multiple days, use last day
All other material concerning an employee, except those documents designated by an appointing officer as requiring special handling or separate filing. Examples of other documents that should be kept in the P-File include Outside Employment or Conflict of Interest requests.	OTHER_LastNameFirstNameMI_mmddyy	*Dates differ – for documents that the employee has signed use that date

Resources

- Classified Employee Personnel Records: WHRH 180
- Electronic Storage of State Employee Official Personnel File: Bulletin DPM-0437-AO/MRS

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3.6 Discipline

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

Discipline Tracking

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Adding An Additional Disciplinary Action For An Employee
Making Changes To A Disciplinary Action
    Updates
    Deletions
Discipline Data Query
Resources

Overview

Discipline tracking functionality was added to STAR HCM in November 2016. DPM requires all agencies to use the functionality within PeopleSoft to track the disciplines within their agency. Agencies are not required to enter discipline data in STAR for disciplinary actions prior to the release of this tracking functionality.

Security

Users must have the Discipline Security Role to access this functionality. Who the user can see is based on their row-level security (typically their business unit or a subset of their business unit).

A disciplinary action corresponds to a specific employee in STAR. The employee's disciplinary record will follow them in the system if they *transfer* to a different agency.

Entering A New Disciplinary Action

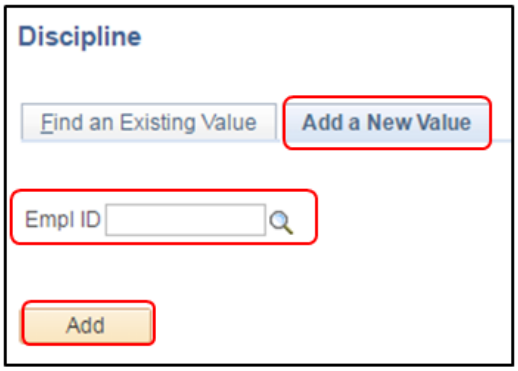
Role: Discipline

*U*se the following steps to enter a disciplinary action. Prior to entering a disciplinary action, it may be helpful to lookup the following information about the employee: Empl ID, Business Unit, and Department ID.

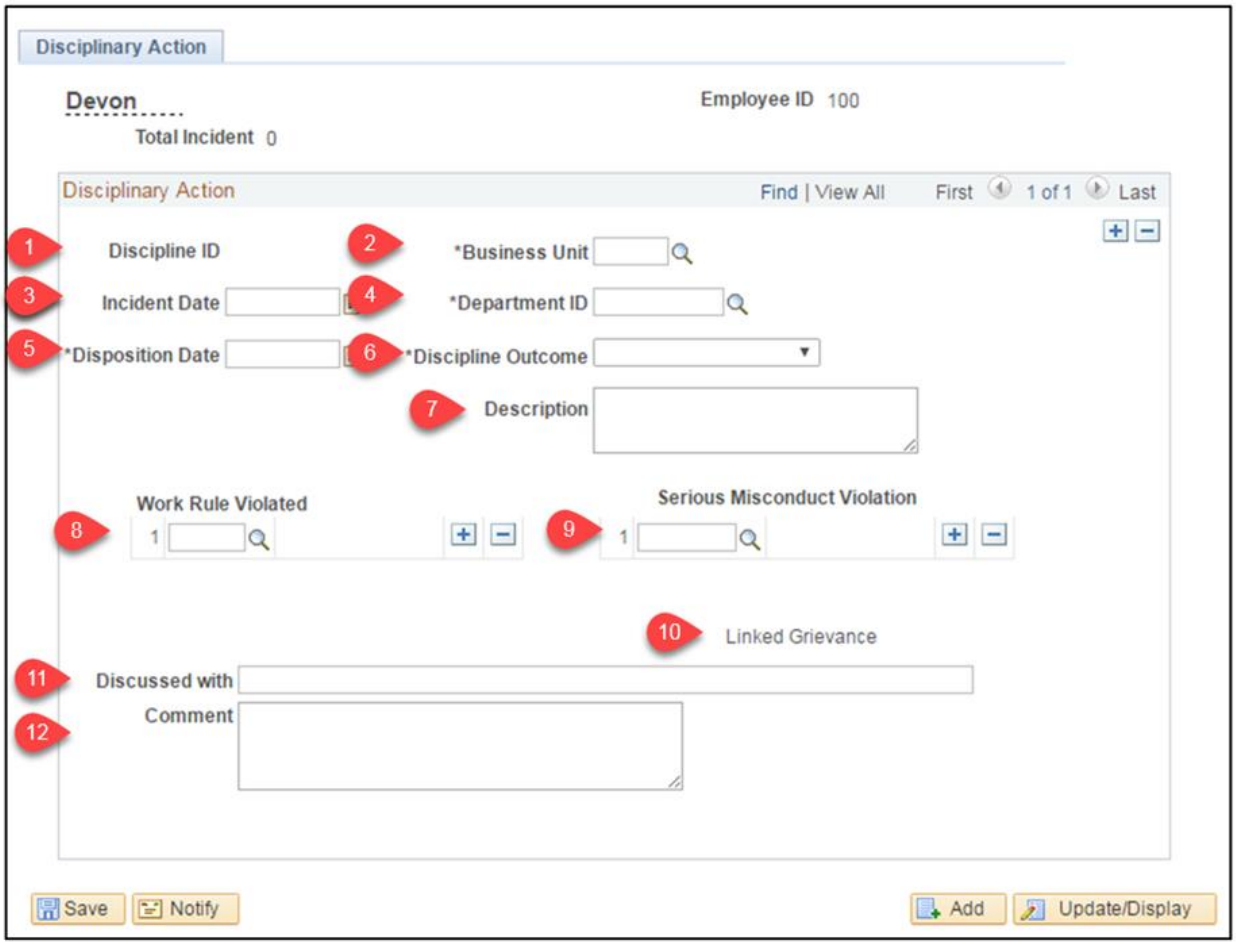


If the employee has an existing disciplinary action, go to page 6: Adding an Additional Disciplinary Action for an Employee

1. Navigate to the Record Disciplinary Actions page
    a. Navigation: Main Menu > Workforce Administration > Labor Administration > WI Record Disciplinary Actions
    b. On the Add a New Value tab, enter or select the Employee ID
        - To search for the employee ID, click the magnifying glass next to the text box
    c. Click Add



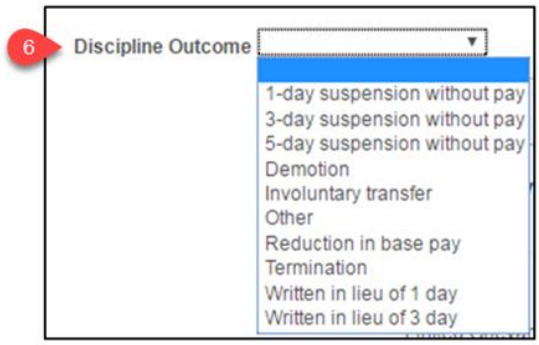
2. Enter the disciplinary action data



1. Discipline ID: A unique identifying number for the discipline that will populate after saving the discipline
2. Business Unit (required): Enter the employee's business unit (agency number)

3. Incident Date: Enter the date of the incident, if applicable
4. Department ID (required): Enter the employee's department ID (division, section, unit, facility, etc.)
    - This information can be found on the employee's job data (Main Menu > Workforce Administration > Job Information > Job Data)
5. Disposition Date (required): Enter the date of the discipline letter
6. Discipline Outcome (required): Enter the outcome of disciplinary action

    - If "Other" is selected, a description must be entered



7. Description: A short description regarding the discipline outcome may be entered in this box
8. Work Rule Violated: Select the work rule that was violated using the magnifying glass
    - If more than one work rule was violated, use the + to add a row
    - If a work rule was added in error, use the – to delete the row
    - Up to five work rules may be entered per disciplinary action

9. Serious Misconduct Violation: Select the serious misconduct violation using the magnifying glass
    - If more than one serious misconduct violation, use the + to add a row
    - If a serious misconduct violation was added in error, use the – to delete the row
    - Up to three serious misconduct violations may be entered per disciplinary action



Serious Misconduct Violation	Description	Short Description
1	While on Duty, harassing a person	Harassment
2	On duty, intentionally inflicting physical harm on another person	Pys. Harm
3	On Duty, intoxicated or under influence of controlled substance	Intoxicate
4	On Duty, possession of controlled substance	Possession
5	Falsifying records of the agency	Falsify
6	Theft of agency property/service with intent to deprive agency	Theft
7	Employee conviction of crime/offense prevent employee from duties	Conviction
8	Misuse/Abuse agency property; including: download, view, display	Property
9	Code of Ethics violation	Ethics

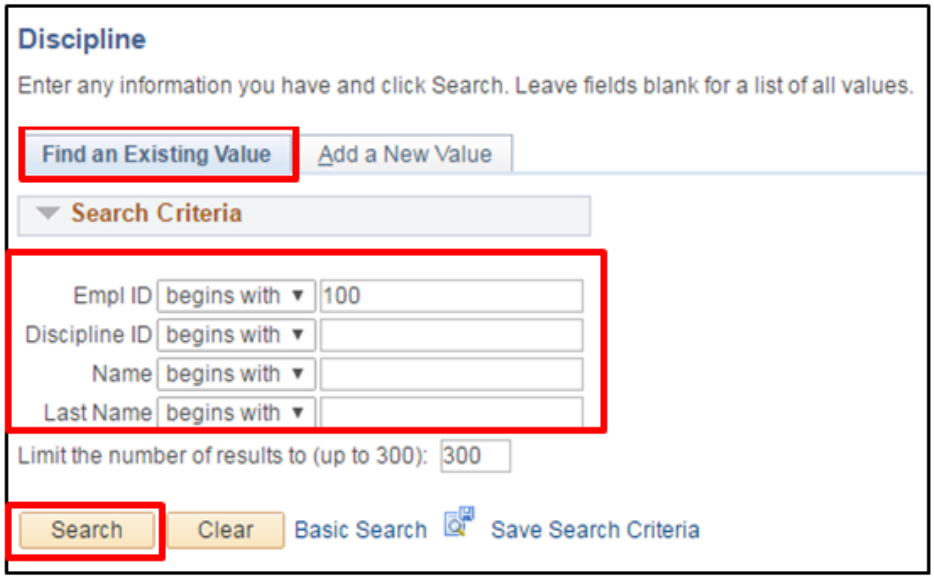
The functionality requires that at least one work rule or serious misconduct violation must be selected.

10. Linked *Grievance*: This text will become a hyperlink once a grievance is entered in STAR and is linked to this disciplinary action. See the Grievance Functionality job aid for additional details.
11. Discussed with: Enter the names of those involved in the disciplinary action investigation
12. Comment: Enter any additional information in this box

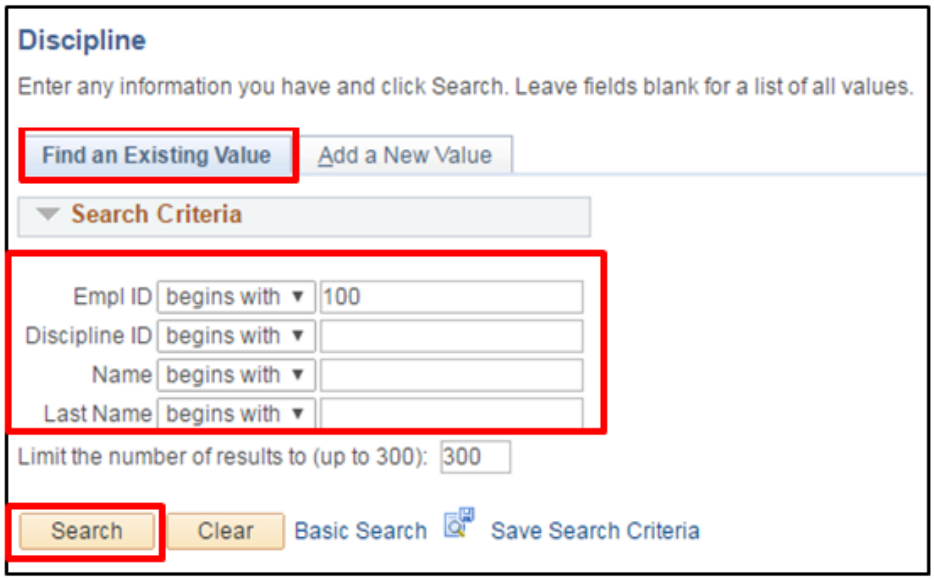
3. Click Save
    - The number of Total Incidents has been updated, and the Discipline ID has been populated

Adding An Additional Disciplinary Action For An Employee

1. Navigate to the WI Record Disciplinary Actions page
    a. Navigation: Main Menu > Workforce Administration > Labor Administration > WI Record Disciplinary Actions
    b. On the Find an Existing Value tab, enter the Employee ID, Discipline ID, Name or Last Name
    c. Click Search



2. Click the plus (+) button to add a record



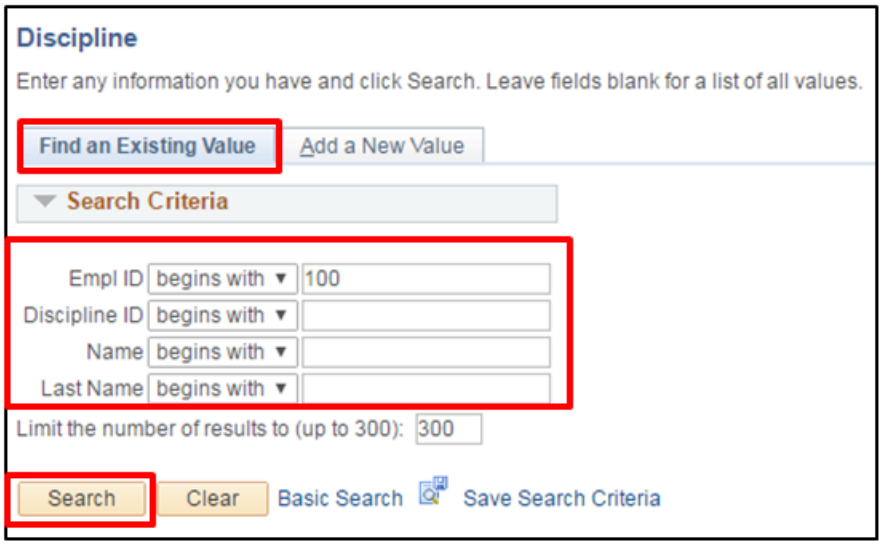
An additional record will be displayed.

3. Enter data into the record (see Entering a New Disciplinary Action steps above)

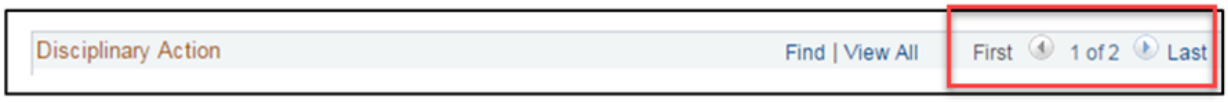
Making Changes To A Disciplinary Action

Updates

1. Navigate to the WI Record Disciplinary Actions page
    a. Navigation: Main Menu > Workforce Administration > Labor Administration > WI Record Disciplinary Actions
    b. On the Find an Existing Value tab, enter the Employee ID, Discipline ID, Name or Last Name
    c. Click Search



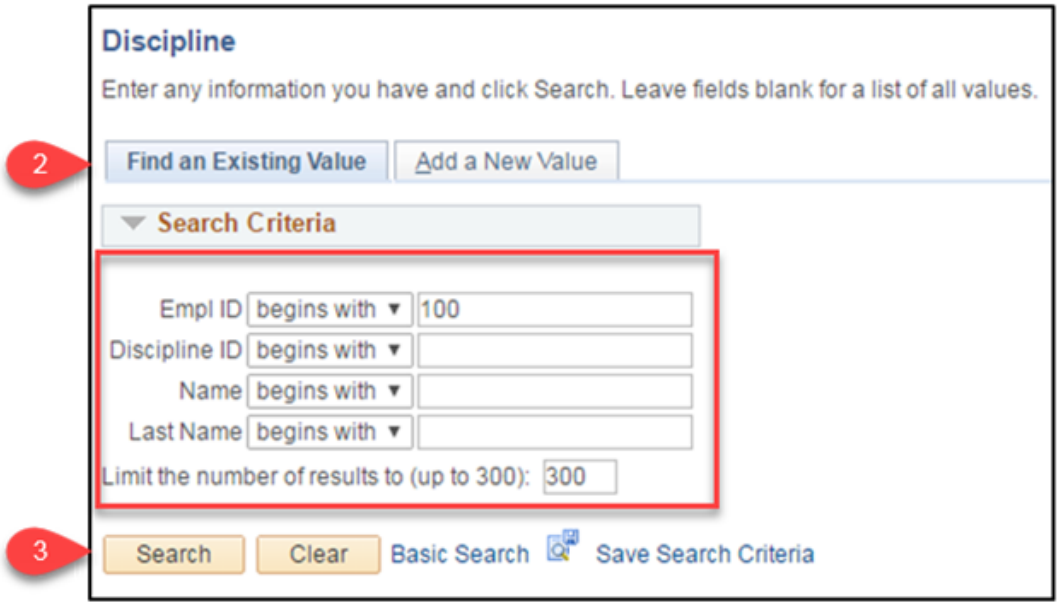
2. Navigate to a specific disciplinary record by clicking the arrows at the top of the page



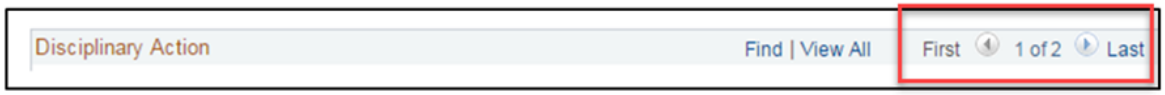
3. Update the applicable information.
4. Click Save

Deletions

1. Navigate to the WI Record Disciplinary Actions page
    a. Navigation: **Main Menu > Workforce Administration > Labor Administration > WI Record Disciplinary Actions**
    b. On the Find an Existing Value tab, enter the Employee ID, Discipline ID, Name or Last Name
    c. Click Search



2. Navigate to the disciplinary record row to be deleted by clicking the arrows at the top of the page



2. Click the minus (-) button to delete the record



3. Confirm the deletion

   a. Click OK



a. Click Save

If there is only one disciplinary record in STAR for the employee, it cannot be deleted by an agency. A support ticket must be submitted to delete the record. Follow your agency's procedure regarding submitting a STAR support ticket. It is important not to leave the erroneous record in PeopleSoft as it will be attached to an employee throughout their career.

Discipline Data Query

See section 4.2 Discipline Data Query.

Resources

- Demotion, suspension, discharge and layoff: s. 230.34, Wis. Stats.
- Employee Work Rules and Discipline Procedure: WHRH 410

3.3.7 Grievance

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

3.3.7.1 Grievance Tracking

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Overview

The *grievance* tracking functionality was updated in STAR HCM in November 2016. DPM requires all agencies to use the functionality within PeopleSoft to track grievances within their agency.

Security

Users must have the Grievance Security Role to access this functionality. Grievances are able to be viewed by all agency users with the Grievance Security Role, regardless of agency. The purpose of this is to allow an employee's prior agency to input a grievance outcome for an employee who has transferred agencies prior to the grievance being fully resolved.

Entering A New Grievance Action

Role: Grievances

Use the following steps to enter a grievance action.

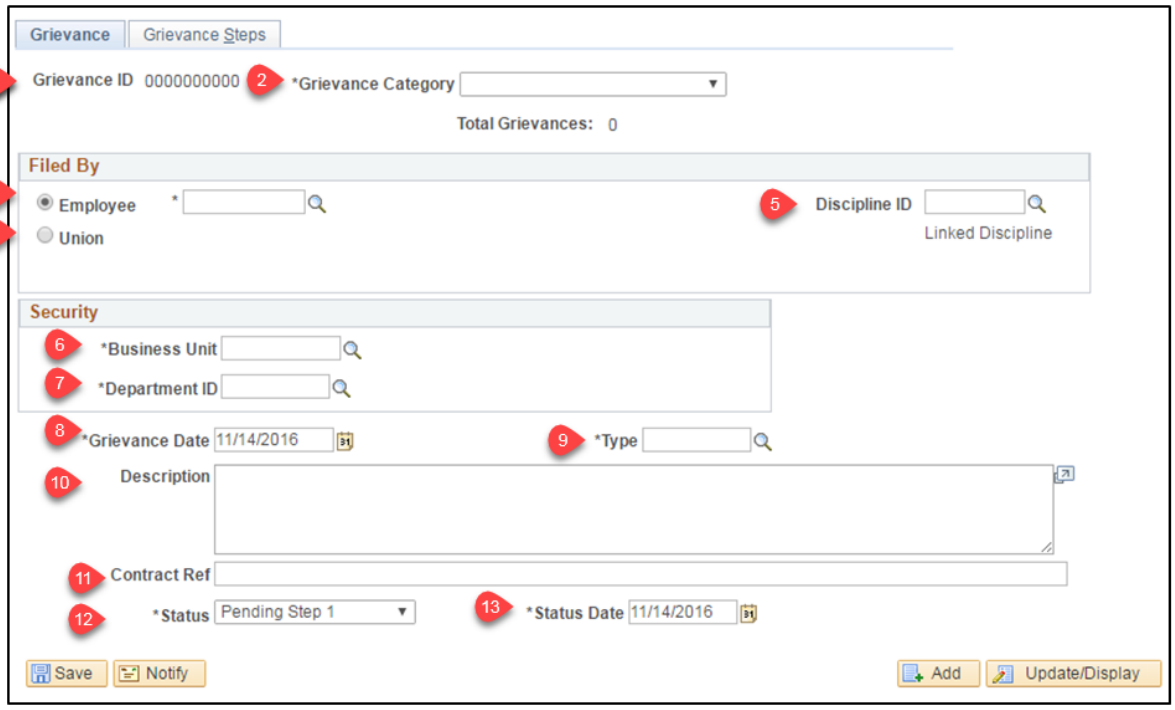
These steps list how to enter the grievance from receipt to step 1 resolution all at the same time. There may be times where you will only enter data through Step 4 - bullet point one and save, and then return at a later date to continue entering the remaining steps. See MAKING CHANGES TO A GRIEVANCE IN PEOPLESOFT for steps to update a grievance.

1. Navigate to the WI Record Grievance Actions page.

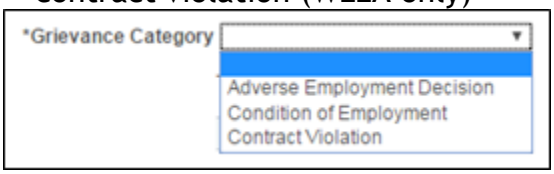
a. Navigation: **Main Menu > Workforce Administration > Labor Administration > WI Record Grievances**
b. Click on the Add a New Value tab
   - Note: The system will auto-generate the Grievance ID
c. Click Add



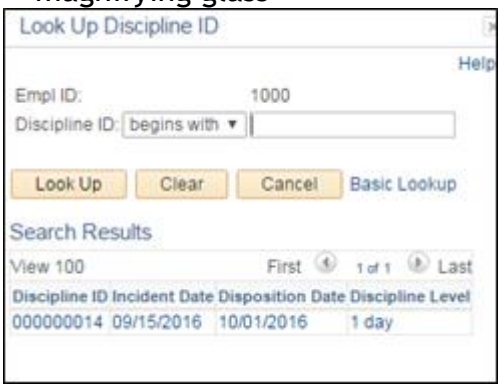
2. Enter the grievance data



1. Grievance ID: A unique identifying number for the grievance that will populate after saving the grievance
2. Grievance Category (required): Select whether the grievance is related to an adverse employment decision, a condition of employment, or a contract violation (WLEA only)

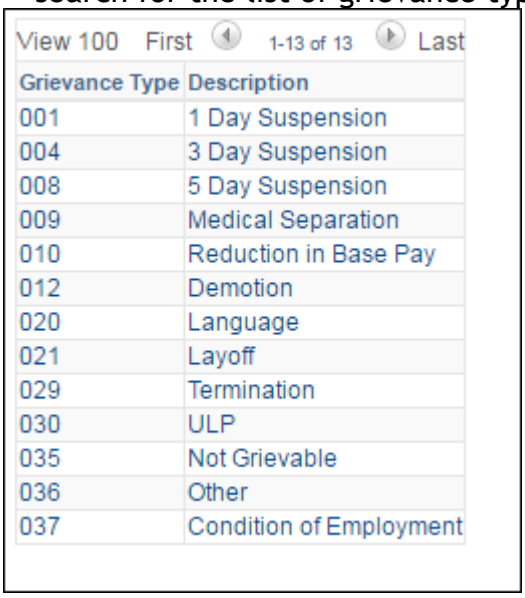


3. Employee: Enter or select the employee ID of the employee who filed the grievance
4. Union: Enter or select the union that filed the grievance (WLEA only)
5. Discipline ID: If the grievance is related to a disciplinary action that is recorded in PeopleSoft, the grievance can be linked to it by clicking the magnifying glass



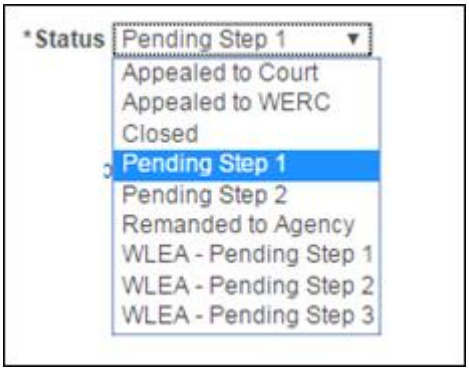
- *Note: Once a Discipline ID is selected the words "Linked Discipline" become a hyperlink that will open a new window to the applicable disciplinary record*

6. Business Unit: Enter the business unit (agency number) the employee was in at the time the grievance was filed
    - *Note: If a disciplinary action is linked to the grievance, the business unit will auto-populate from the disciplinary action in STAR*
7. Department ID: Enter the Department ID the employee was in at the time the grievance was filed
    - Note: If a disciplinary action is linked to the grievance, the department ID will auto-populate from the disciplinary action in STAR
8. Grievance Date: Enter the date the grievance was received. If received via mail, use the date of postmark.
9. Type: Enter the type of grievance. The magnifying glass can be used to search for the list of grievance types.


View 100 First 1-13 of 13 Last

Grievance Type	Description
001	1 Day Suspension
004	3 Day Suspension
008	5 Day Suspension
009	Medical Separation
010	Reduction in Base Pay
012	Demotion
020	Language
021	Layoff
029	Termination
030	ULP
035	Not Grievable
036	Other
037	Condition of Employment

10. Description: A description of the grievance may be entered in this text box
11. Contract Ref: Enter the contract reference for this grievance, if applicable
12. Status: As the grievance progresses, the status should be updated to reflect where the grievance is in the process



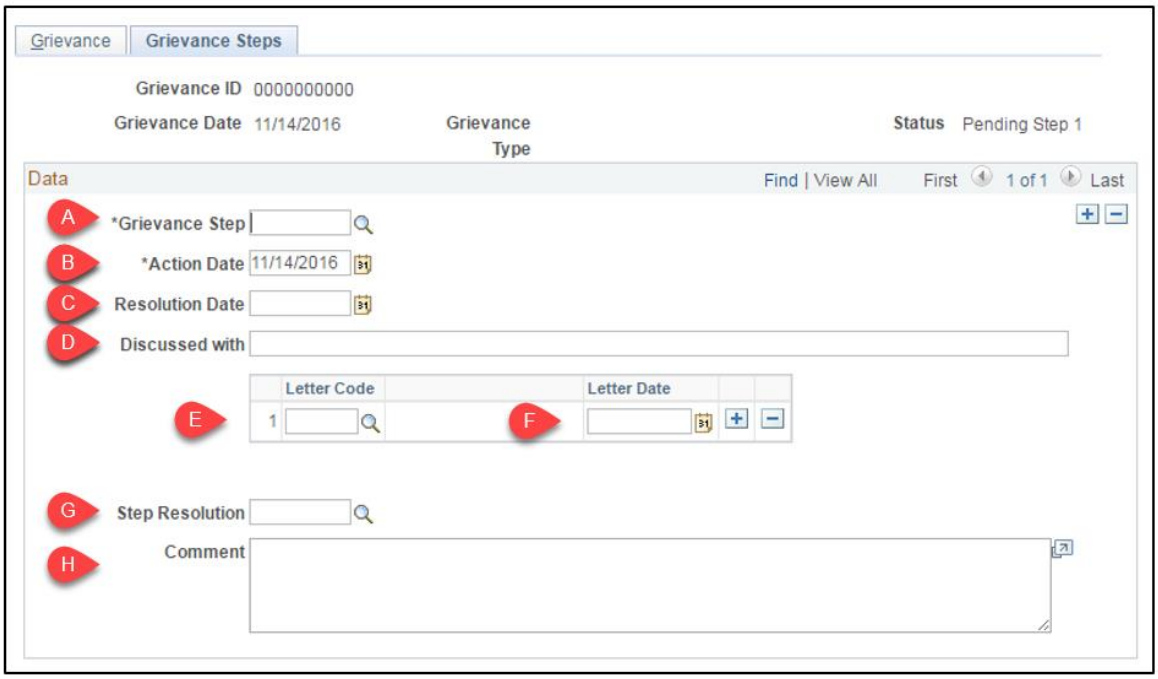
- *Note: The status history is not tracked. Each time the status is updated, it overrides the existing status.*

13. Status Date: Enter the effective date of the Status

3. Click the Grievance Steps tab to add step 1



4. Enter Step 1 data



A. Grievance Step: Select Step 1. Use the magnifying glass to search.

Grievance Step	Description
001	Step 1
002	Step 2
ARB	Arbitration
CRT	Court
WRC	WERC

B. Action Date: Date the grievance was heard
C. Resolution Date: Date this step in the grievance was resolved

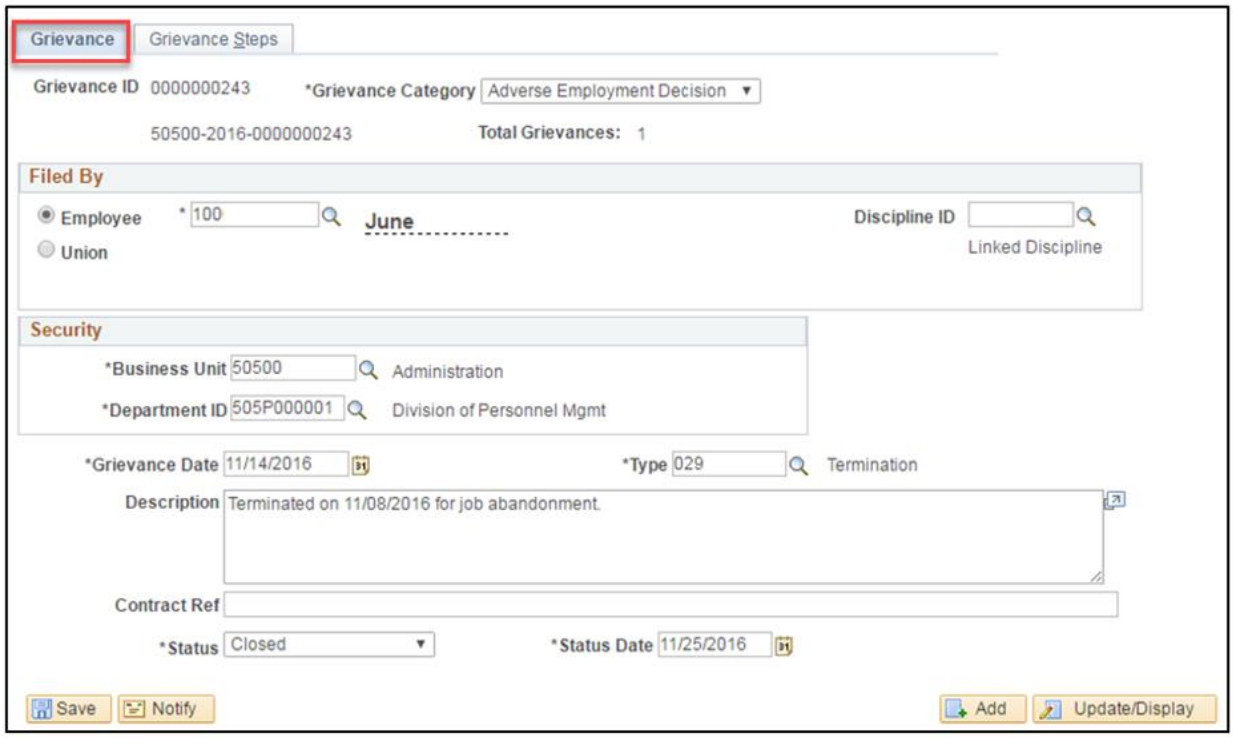
D. Discussed with: Enter the name of the people present at the grievance meeting
E. Letter Code: Select how the letter was sent. Use the magnifying glass to search.

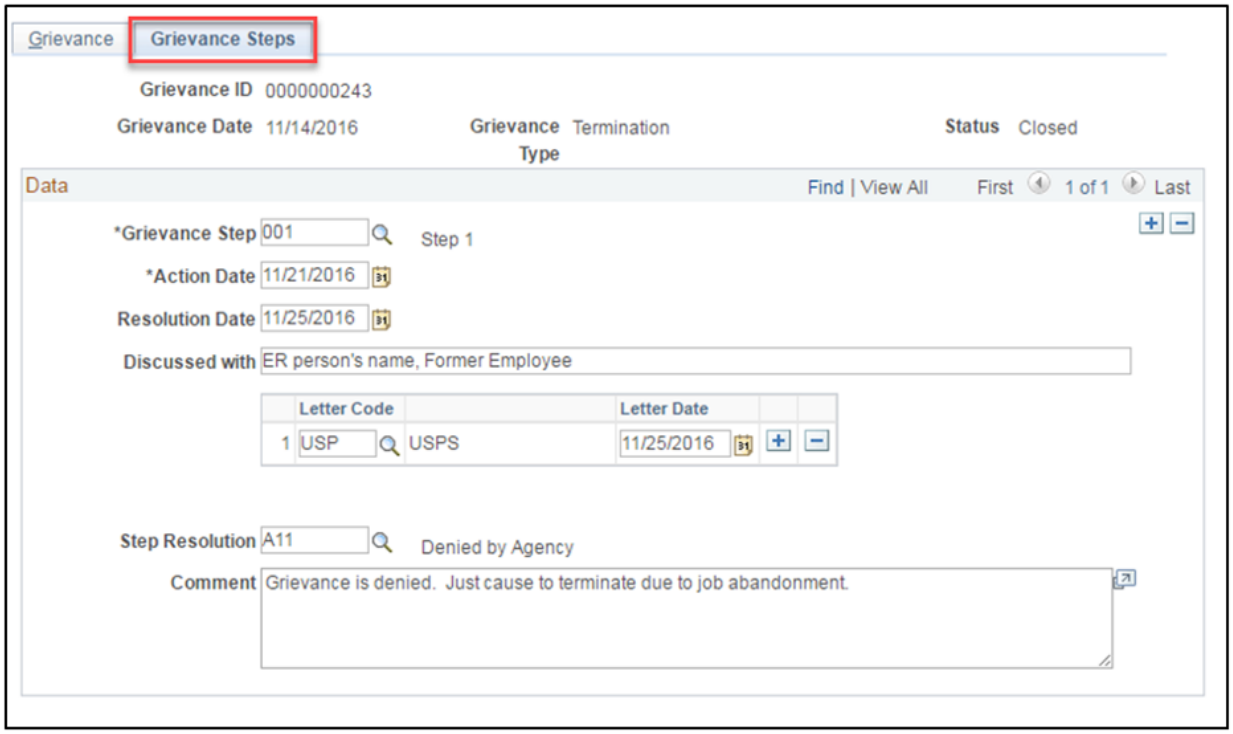
Letter Code	Description
CRT	Certified Mail
EML	e-mail
HDL	Hand delivered
IND	Inter-D
USP	USPS

F. Letter Date: Enter the date when the response was given to the employee. This should be the same date listed on the grievance form.
    - *Note: If the letter was sent in more than one way, the + should be clicked to add an additional row*
G. Step Resolution:Enter the outcome of the step
    - *Agencies should use the following steps for the Step 1 Resolution:*
    - *Note: Additional Resolution Types are available for selection, but those are to be used for Steps 2 and beyond.*
H. Comment: Additional information may be entered. This should be the same as the Employer's Decision on the grievance form.

5. Update the overall grievance status on the Grievance tab to "Closed" once a step resolution has been entered
6. Click Save

Grievance Example





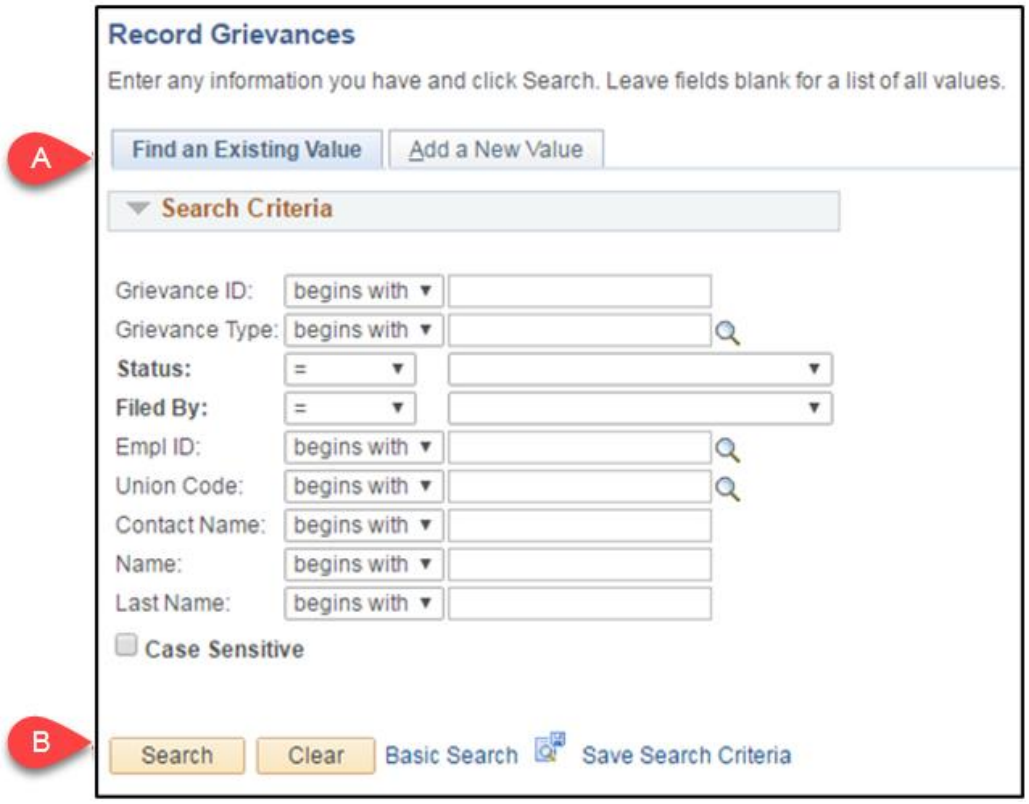
Searching For A Grievance

1. Navigate to the WI Record Grievances page

a. Navigation: **Main Menu > Workforce Administration > Labor Administration > WI Record Grievances**

b. On the Find an Existing Value tab, enter the search criteria

c. Click Search



2. Click on the record within the search results

- ***Note**: If only one grievance meets your search criteria, you will be taken directly to the grievance data*

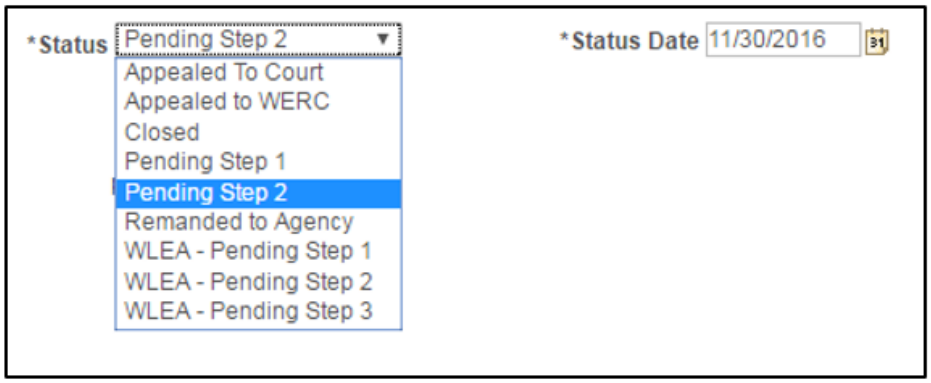
Making Changes To A Grievance In PeopleSoft

Adding Steps

1. Navigate to the WI Record Grievances page
   a. Navigation: **Main Menu > Workforce Administration > Labor Administration > WI Record Grievances**
   b. On the Find an Existing Value tab, enter the search criteria
   c. Click Search
2. Click on the record within the search results

- **Note**: If only one grievance meets your search criteria, you will be taken directly to the grievance data

3. Update the overall **Status** and **Status Date** on the Grievance tab



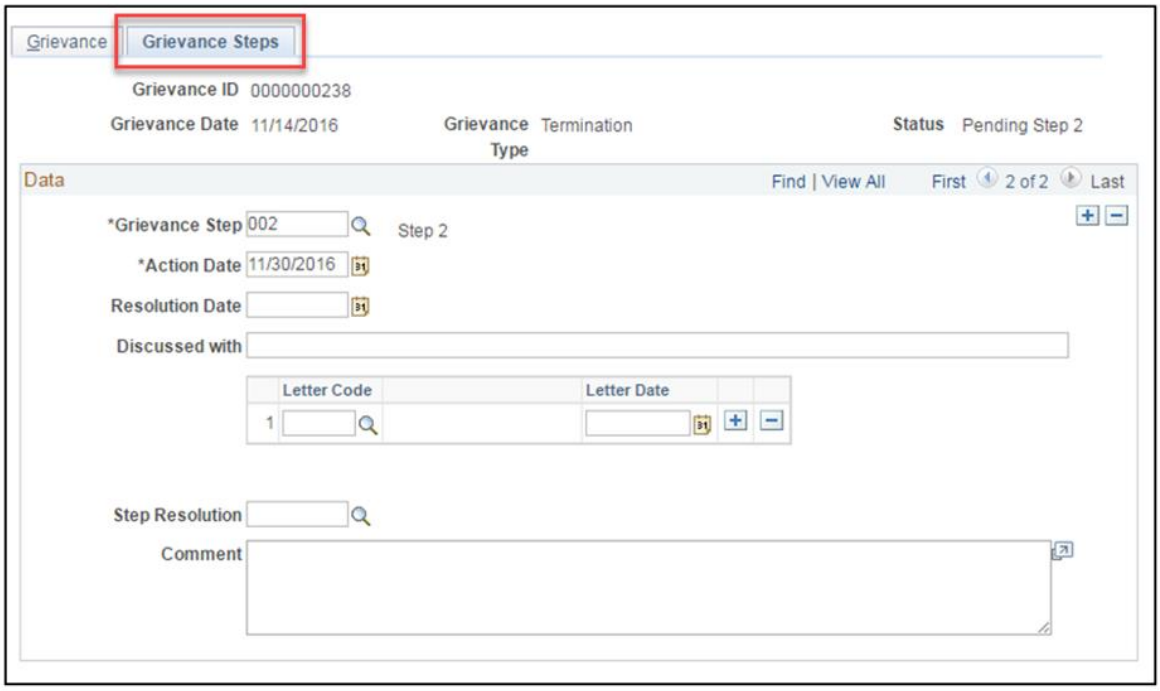
4. Click the Grievance Steps tab to add an additional step to an existing grievance



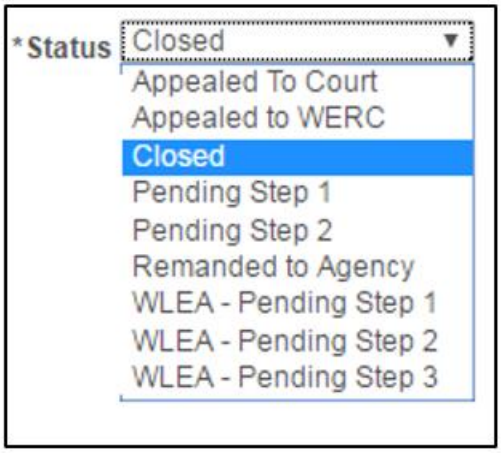
5. Click the plus (+) sign to add an additional step



6. At a minimum, enter the Grievance Step. You may choose to save, and return later to enter the remaining information.



7. Update the overall grievance Status and Status Date on the Grievance tab to "Closed" once a step resolution has been entered



8. Click Save

Deletions

1. Navigate to the WI Record Grievances page
    a. Navigation: **Main Menu > Workforce Administration > Labor Administration > WI Record Grievances**
    b. On the Find an Existing Value tab, enter the search criteria

c. Click Search

2. Click on the record within the search results
   - ***Note**: If only one grievance meets your search criteria, you will be taken directly to the grievance data*
3. Navigate to the grievance row to be deleted by clicking the arrows at the top of the page



4. Click the minus (-) button to delete the row



4. Confirm the deletion
   a. Click OK



   b. Click Save

If there is only one grievance row in STAR for this grievance, it cannot be deleted by an agency. A support ticket must be submitted to delete the record. Follow your agency's procedure regarding submitting a STAR support ticket. It is important not to leave the erroneous record in PeopleSoft as it will be attached to an employee throughout their career

FAQs

Are agencies required to use the grievance tracking functionality?

- Yes, DPM requires agencies to use the grievance tracking functionality.

Who enters each step of a grievance?

- Agencies will enter steps 1 and the WERC.
- DPM will enter step 2.

When a step is completed, what should the overall status be?

- The overall status should be changed to “Closed”. If the grievant appeals to an additional step, either DPM (step 2) or the agency (WERC) will update the overall status to “Pending Step 2” or “Appealed to WERC”.

- Note: The grievance functionality does not store the history of the overall status, and only displays the most current status.

What field does DPM use to track the date they received a Step 2 grievance?

- DPM uses the Action Date on the Step 2 row.

When should I enter the grievance details into PeopleSoft?

- It is recommended that you enter information on the Grievances tab and add the Step 1 row at the time the grievance is received by the agency. Once Step 1 is resolved, you can go back in and update the overall status to closed, and fill in the data for Step 1.
- When DPM receives Step 2 grievances, a record of the Step 1 grievance should be in PeopleSoft. If there isn’t a record in PeopleSoft, DPM will reach out to the agency to have them enter it.

Grievance Data Query

See 4.3 Grievance Data Query.

Resources

- Grievance process for demotion, suspension, discharge, layoff, or reduction in base pay: s. 230.445, Wis. Stats.
- Grievance Procedure under s.230.445, Wis. Stats.: WHRH 430
- Grievance Procedure under s. 230.04(14): Ch. ER 46, Wis. Adm. Code

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.3.8 Reasonable Accommodation



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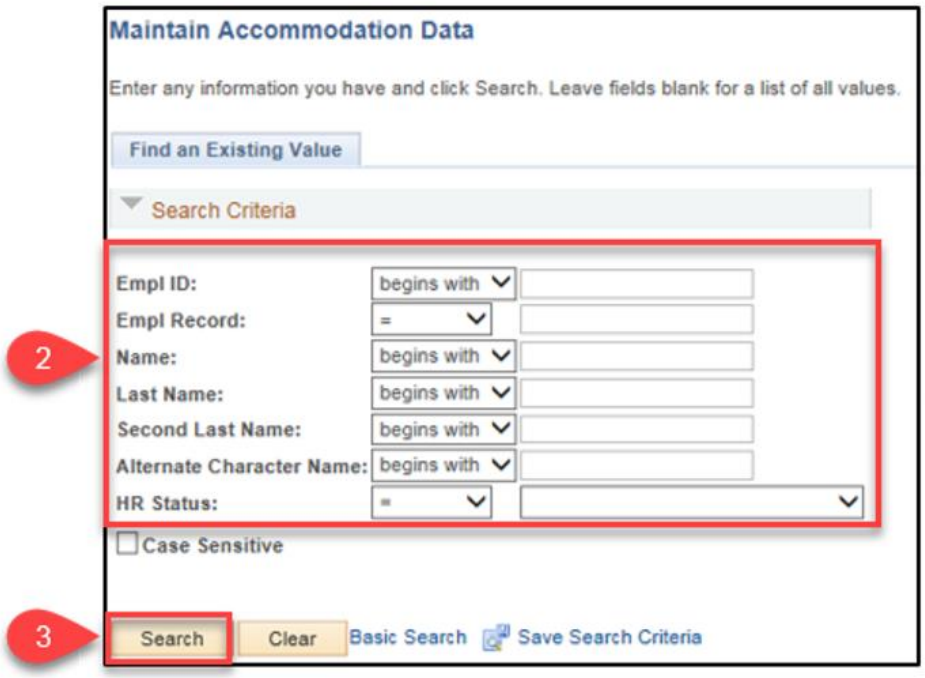
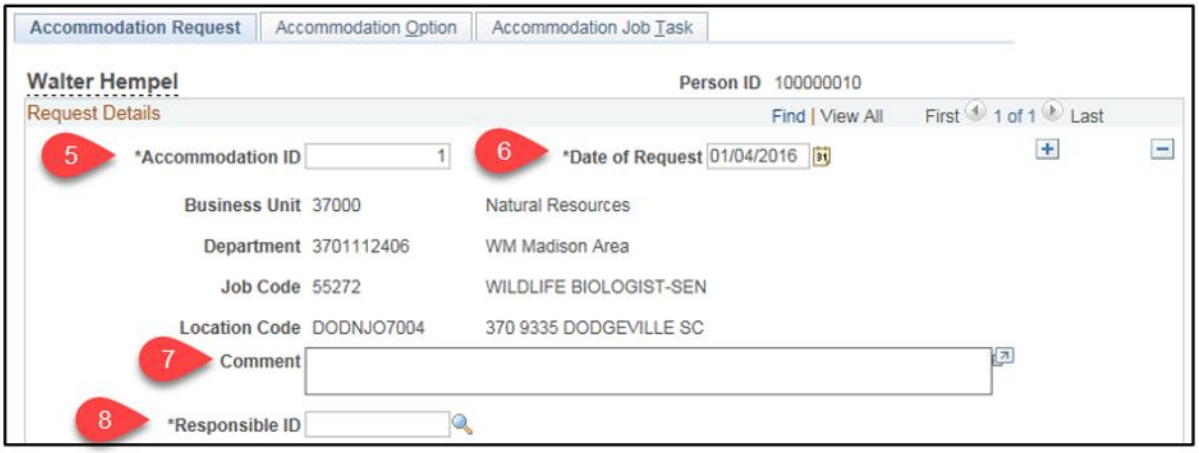
3.3.8.1 Entering Reasonable Accommodation

Role: *Reasonable Accommodation* Specialist

1. Navigation: **Main Menu > Workforce Monitoring > Meet Regulatory Requirements > Maintain Accommodation Data**
2. Enter at least one search criteria in the **Find an Existing Value** tab.
3. Click **Search**.



4. If multiple employees result, click the desired employee from the **Search Results** list.
5. PeopleSoft assigns the next sequential number for the **Accommodation ID**. This number should not be edited.
6. Enter or select the desired **Date of Request**. This should be the date on which the accommodation request was made, or the day the accommodation request form was received.
7. Enter notes, status updates, and comments on the accommodation in the **Comment** box
8. Enter or select the **Responsible ID**. This is the person with the RA Specialist Security Role managing the accommodation.

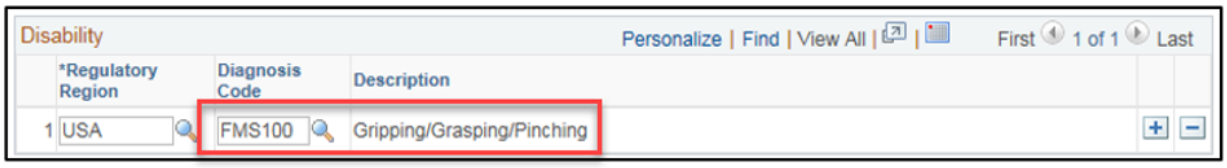


9. Verify and update the data in **Request Status** section:
    - For a new request, the **As of**: date should equal the Date of Request; Select Pending.



10. In the ***Disability*** section, enter or select the **Diagnosis Code** value that best corresponds to the applicable major life activity or major bodily function affected by the condition(s). There may be multiple Diagnosis Codes per request; add a row for additional impairments.

Diagnosis codes are not intended to capture an employee's specific medical diagnosis.



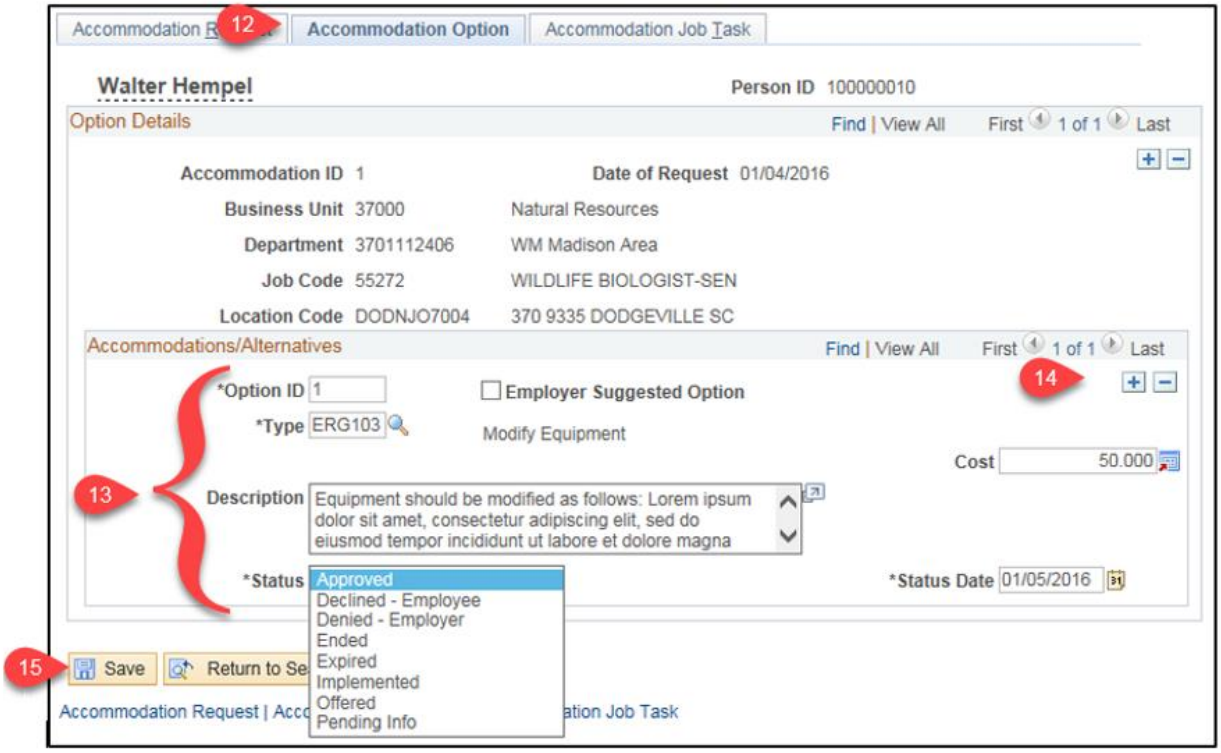
11. Click **Save**.
12. Click the **Accommodation Option** tab to enter the option(s) the employee requested.

Entering an employee option into STAR PeopleSoft does not mean that it has been, or will be, approved. All employee requests are entered for tracking purposes.

13. Enter or select the following:
    - **Option ID:** PeopleSoft assigns the next sequential number. This number should not be edited.

- **Employer Suggested Option checkbox:** Only check when denying or altering the employee's request and entering an alternate employer-suggested option on a new row.
- **Type:** Select the appropriate accommodation type. These are predefined by DPM.
- **Cost:** The monetary fee associated with the accommodation, if known. Cost figures are used to report expenses.
- **Description:** Enter a summary of the accommodation option.
- **Status:** Used for tracking the progress of the accommodation option. Update as the status changes.
- **Status Date:** Enter the date the current status was valid.

14. Click **Add a Row** (+) in the Accommodations/Alternative sections to record additional options as needed.
15. Click **Save**.



16. Follow your agency business processes regarding reasonable accommodation requests. Once an effective accommodation has been determined, the RA Specialist will make the offer to the employee and then log back into STAR PeopleSoft and update the Reasonable Accommodation request as needed until the process has concluded.

This page last updated in Release Number: 17-01

Release Date: 10/02/17
Effective Date: 10/02/17

3.4 Payroll

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3.4.1 Payroll



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

3.5 Position Management

3.5.1 Viewing Position Data

Under Construction



Please refer to the Viewing Position Data STAR Job Aid for this topic.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

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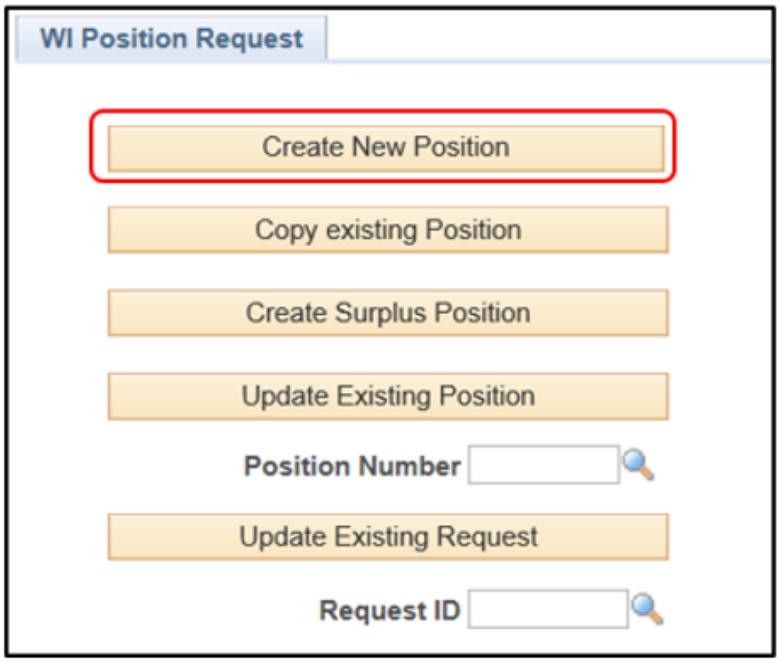
3.5.2 Creating Position Data

Security role: Agency Position Specialist (AGENCY_BUDGET)

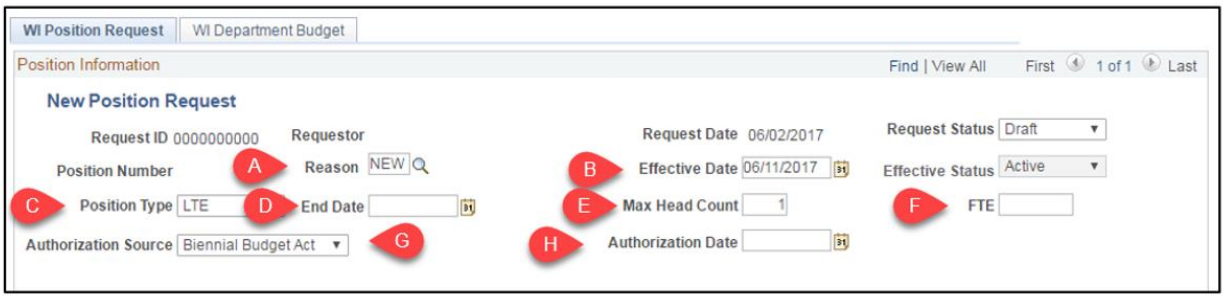
1. Navigation: **Main Menu > State of Wisconsin (STAR) > Human Resources > Process > WI Position Requests > WI Position Request Home**
2. Click Crete New Position.



3. In the Position Information section, enter data for the following fields:

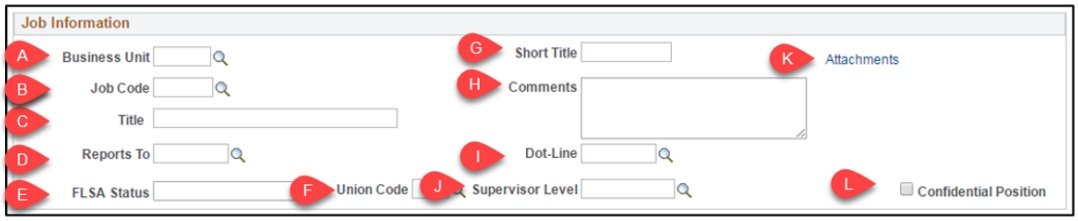
A. **Reason**: Defaults to NEW
B. **Effective Date:** The date the position is effective
   - The position must have an effective date on or before the date of the hire
C. **Position Type**: Select the appropriate value
D. **End Date**: Position end date
   - Permanent positions should NOT have an end date
E. **Max Head Count**: Defaults to 1, update when appropriate
F. **FTE**: Enter the full time equivalent value associated to the position
   - LTEs should have an FTE of 0

G. **Authorization Source**: Select the appropriate value
H. **Authorization Date:** Date the position is authorized by the Authorization Source



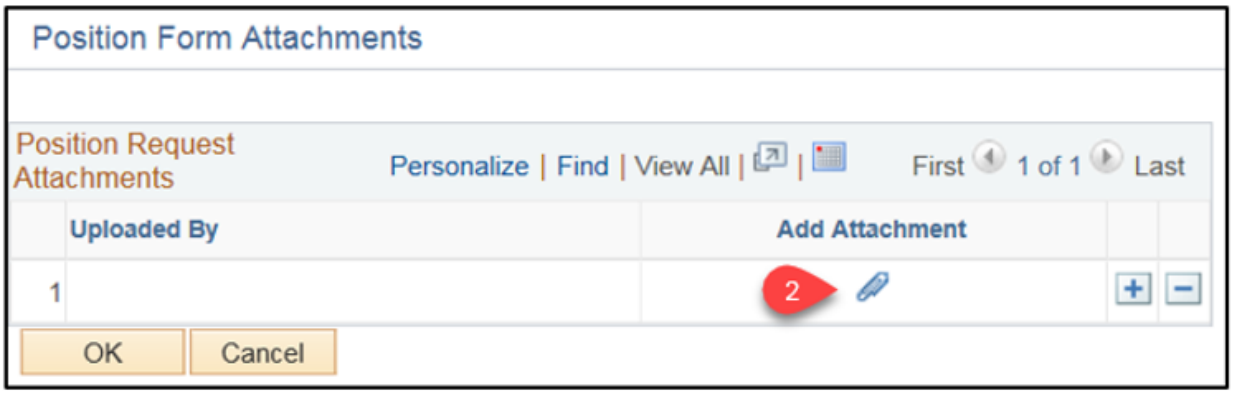
4. In the Job Information section, enter data for the following fields:
    A. **Business Unit:** Enter or select the appropriate agency to which the position is assigned
    B. **Job Code**: Enter or select the appropriate value
    C. **Title:** Defaults from Job Code, but may be overridden to reflect a working title
    D. **Reports To:** Enter or select the position number to which the newly created position reports
    E. **FLSA Status:** Defaults from Job Code
        - The default value is based on a permanent position. For LTEs, ensure the FLSA status matches the alpha list on DPM's website
    F. **Union Code:** Enter or select the appropriate value (DOT use only)
    G. **Short Title**: Defaults from Job Code
    H. **Comments:** Enter as justification for the new position
        - *LTE* positions do not route to the SBO, but a comment is required
    I. **Dot-Line (optional)**: Enter or select the position number of an indirect supervisor or lead worker
        - This field is not on job data, and is for reporting purposes only
    J. **Supervisor Level (optional):** Enter or select the appropriate level


DPM has not rolled out the use of this functionality



    K. Attachments (optional): Attach documentation relevant to the position creation

1. To upload an attachment, click Attachments
2. Click the paperclip icon

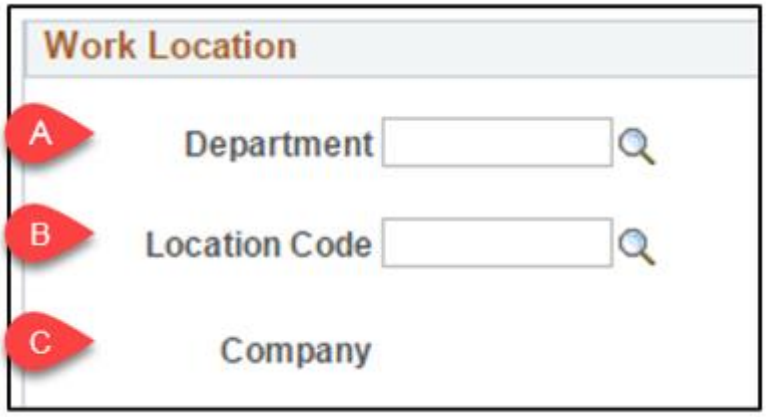


3. Click Choose File. Locate and select the document to be uploaded.
4. Click Upload
5. Click OK

L. Confidential Position: When appropriate, select to designate the position and position incumbents as excluded from any external public databases
   - These are positions that perform duties that are confidential in nature, and it would be detrimental to the employee and employer to have information related to the position and *incumbent* released externally.
   - Requires approval of DOA Legal

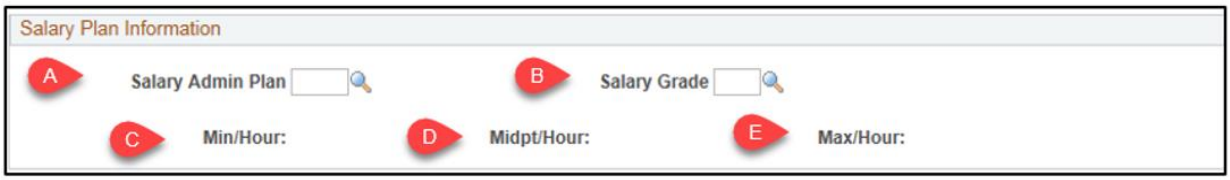
5. In the Work Location section, enter data for the following fields:

A. Department: Enter or select the appropriate department ID representing the position's hierarchical relationship within the organization.
B. Location Code: Defaults from Department ID, but should be overridden if the default location code does not match the physical location of the position
C. Company: Defaults from the Department ID, and cannot be overridden



6. In the Salary Plan Information section, data for the following fields defaults from the entered values as listed:

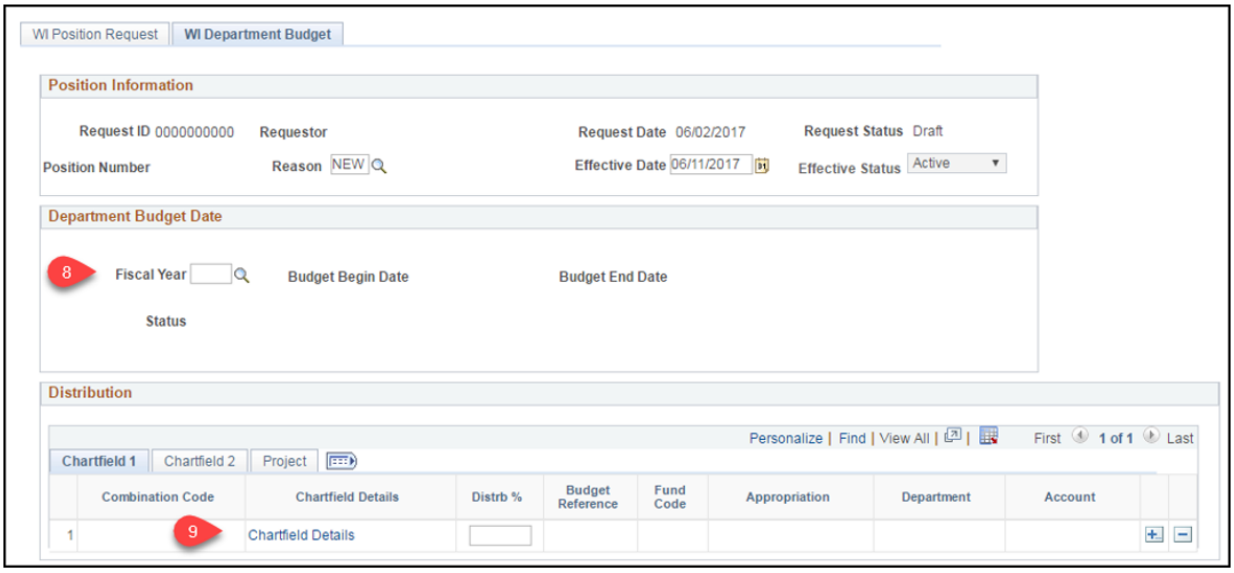
A. Salary Admin Plan: Defaults from job code, and cannot be overridden
B. Salary Grade: Defaults from job code, and cannot be overridden
C. Min/Hour: Defaults from job code, and cannot be overridden
D. Midpt/Hour: Defaults from job code, and cannot be overridden
E. Max/Hour: Defaults from job code, and cannot be overridden



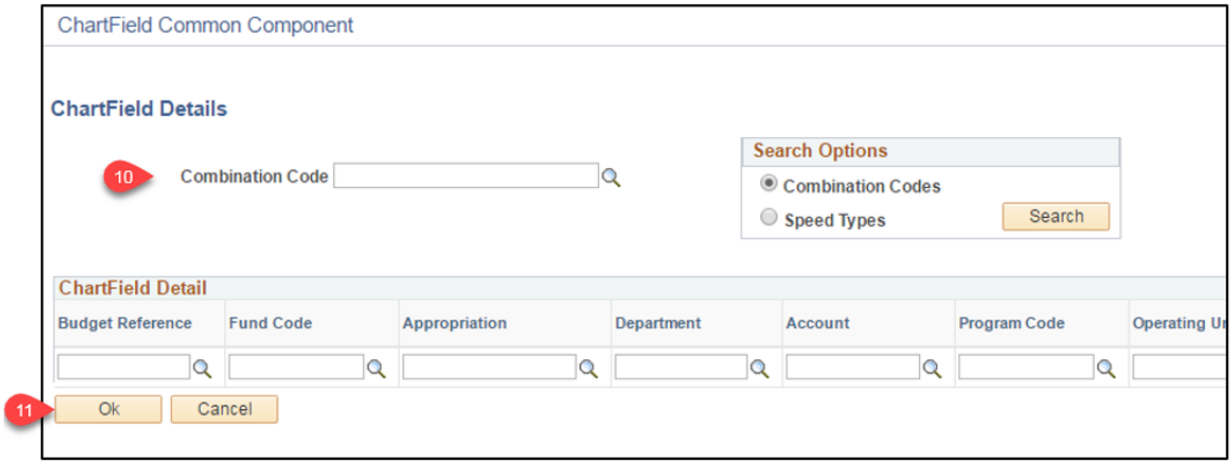
7. Click the WI Department Budget tab



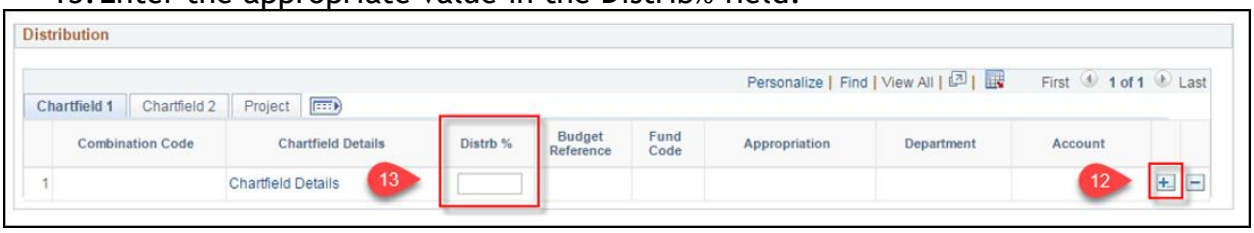
8. Enter or select the appropriate Fiscal Year.
9. Click the ChartField Details link.



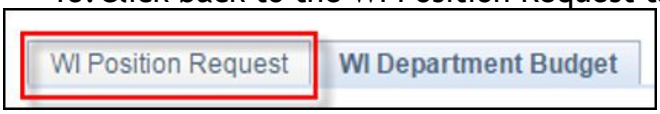
10. Enter or Select the appropriate Combination Code.
    - ChartField Details populate based on the selected Combination Code.
11. Click OK.



12. Click Add a Row (+) if necessary to add additional lines.
13. Enter the appropriate value in the Distrib% field.



14. Click Save Form.
15. Click back to the WI Position Request tab.



14. Click Submit.



The position request will route through Agency approvals as well as State Budget Office approvals (for non-LTE positions).

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3.5.3 Maintain Position Data (Updates)

Creating a Position Update Request
Required approvals for a Position Update Request
Downstream effects of Position Updates

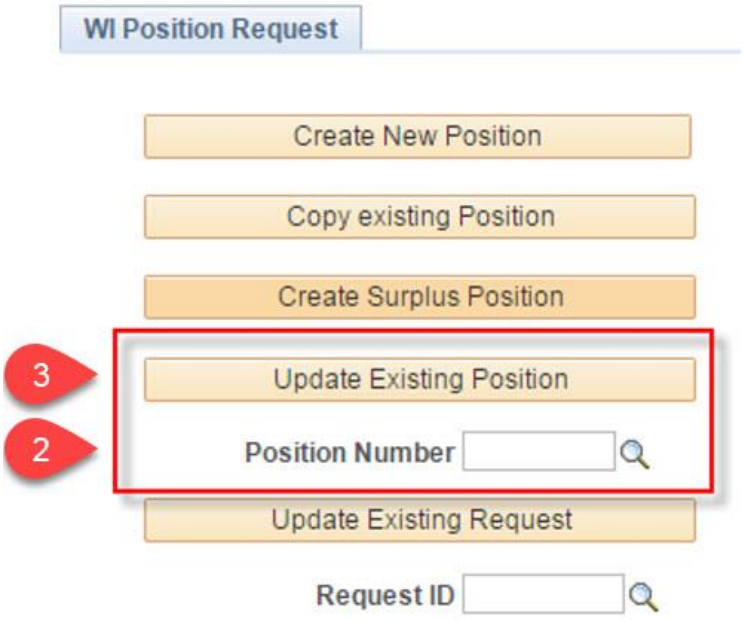
To update a position, either vacant or filled, within STAR PeopleSoft, a Position Update Request Form must be completed by the Agency Position Management Specialist, and, in some cases, approved by the agency and/or the State Budget Office.

This job aid provides direction on how to create a position update request for existing positions in STAR PeopleSoft, an overview on the approvals needed, and other employees you should notify when making updates.

Creating a Position Update Request

Security role: Agency Position Specialist (AGENCY_BUDGET)

1. Navigate to: **State of Wisconsin (STAR) > Human Resources > Process > WI Position Requests > WI Postion Request Home**
2. Enter or Search for the Position Number
3. Click Update Existing Postion.



4. Update the Reason field to define the type of update that is being made to the position. Refer to the Action/Action Reason Job Aid on STAR Connection.

A reason of UPD defaults in; this is not a valid value for submission. If you do not update the field to reflect the type of update you are making before clicking Submit, the system displays an invalid value pop-up error and will not allow you to submit until this field is changed.

5. ***U***pdate the Effective Date field to define when the update should take place
   - Position data can only be updated once per effective date
   - Users will not be able to use an effective date that is prior to the employee's most current job data row and/or the budget data effective date

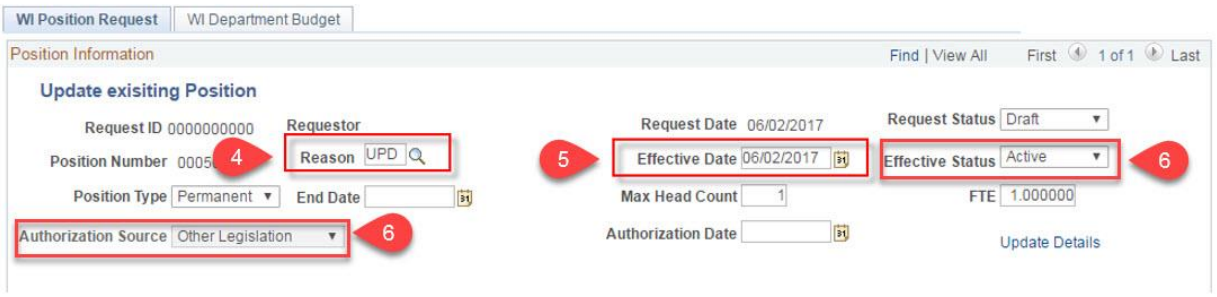
i. Budget data effective dates can be viewed at the following navigation: Main Menu> Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

ii. If an effective date cannot be used, submit a ticket to STAR Support with the information that is changing, and the effective date to use.

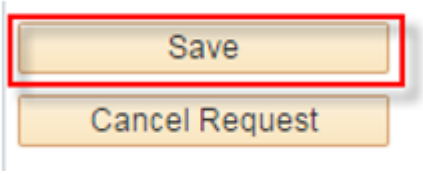
6. Update fields as necessary

Changes effective 06/05/2017:

- The comments box will be empty, and requires a comment
- Users will not be able to change the Effective Status to "inactive" if an *incumbent* is in the position
- Users will not be able to update the Authorization Source



7. Click Save to save your changes to the position.



8. Click Submit to submit the request for approval and for the system to run error checking on the request form.



Required approvals for a Position Update Request

Once an update is requested, there may or may not be approvals required, based on what kind of changes are submitted. The table below defines what approvals are required based on what fields are updated.

Field Updated	No Approval Required	Only Agency Approval Required	Agency & SBO Approval Required
Confidential Flag	X		
FLSA Status	X		
Location Code	X		
Reports To	X		
Dotted-Line	X		
Short Title	X		
Title	X		
Union Code	X		
Supervisor Level	X		
Combination Codes		X	

Funding Distribution		X	
HR Department		X	
Job Codes		X	
Term Dates		X (LTEs)	X (non-LTEs)
Position Type		X (LTEs)	X (non-LTEs)
Authorization Source			X
Authorization Date			X
Appropriation Changes			X
Business Unit			X
Effective Status			X
FTE			X
Max Head Count			X
Statutory Fund Changes			X



When you update Statutory Funds, the fund code does not display what statutory fund the fund code belongs to, so you need to refer to documentation from financials to determine if the Statutory Fund has changed or not.

- If the request does not require Agency or State Budget Office approval, the position is updated in PeopleSoft (along with any applicable payroll coding), and the requestor is notified via email.
- If the request requires only Agency approval, the position update request will appear on the Position Mass Approval page for Agency approval. Once it is approved, the position is updated in PeopleSoft (along with any applicable payroll coding), and the requestor is notified via email.
- If the request requires State Budget Office approval, the State Budget Office Position Management Specialist and State Budget Office Position Management Approver must approve the request before the position can be updated and the requestor notified.



Helpful Tips

- The update form can only have one open request for a particular position at a time in order to prevent order of operations issues. To process multiple updates at once,the requestor should make all changes in a single request or submit and process eachrequest before starting another
- When updating existing positions, changes will be applied to job data. Of note, updates to positions with incumbents should be done thoughtfully; any corrections will require a support ticket as agencies cannot modify historical data.

- Do not update the job record until the position has been updated. For example,for a reclass, do not enter the new pay rate until the position has been updated.

Downstream effects of Position Updates

Changing the job data for incumbents can have serious downstream effects, so it is important to make these updates with care. If updates to incumbent positions are made in error, a user must submit a STAR Support ticket.

The following are possible downstream effects that can occur when incumbent job data is updated, along with what role should be contacted when corrective action must be taken:

Field Changed	Downstream Impact	Who To Notify
FTE	Income Continuation Insurance (ICI) Annual Benefits Base Rate needs to updated; eligibility for the employer contribution towards health insurance may change	Payroll & Benefits Specialist
FTE	Absence Entitlements	Payroll & Benefits Specialist
Job Code	Absence Eligibility Group may need to be changed & Entitlements may need to be recalculated	HR Specialist & Payroll & Benefits Specialist
FLSA Status	Absence Eligibility Group needs to be changed & Entitlement recalculated	HR Specialist & Payroll & Benefits Specialist

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Effective Date: 10/02/17

3.6 Time and Labor

3.6.1 Time and Labor



Please refer to these STAR Job Aids for this topic.

Payroll Time and Labor Reports
Time and Labor - Elapsed Time Reporters
Time and Labor - Punch Time Reporters
Payroll Time and Labor Reports

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4 Reports and Queries

4.1 Person Profile Queries

Querying Person Profile Pages

Navigation: **Main Menu > Reporting Tools > Query > Query Manager**

For complete instructions on running a query, refer to the How to Run Reports and Queries Job Aid.

Query Name	Short Description	Description
WI_HR_PP_BCKRND_CURR_ACTIV_CHK	Background: Current Active Chk	Lists employees who have a particular, current background check.
WI_HR_PP_BCKRND_DUE_FOR_CHK	Background: Due for Test	Lists employees that are due for a particular background check within the specified date range.
WI_HR_PP_DISABLED_VET	Disabled Vet	Lists employees that are disabled veterans – displays their *disability* code.
WI_HR_PP_EMPLY_CURR_ACTIV_TEST	Employment: Current Active Test	Lists employees who have a particular, current test.
WI_HR_PP_EMPLY_DUE_FOR_TEST	Employment: Due for Another Tst	Lists employees that are due for a test within the specified date range.
WI_HR_PP_EXPIRED_CHECKS	Expired Person Profile Checks	Lists employees who have expired background checks.
WI_HR_PP_LIC_CERT_REG_ACTIVE	License, Cert, Reg: Curr Active	Lists employees who have a particular, current License/Cert/Registration.
WI_HR_PP_LIC_CERT_REG_EXPIRING	License/Cert/Reg: Expiring	Lists License/Cert/Registration that are expiring within the specified date range.
WI_HR_PP_NO_CHECKS	No Person Profile Checks	Lists employees who have no background checks at all.
WI_HR_PP_PROBATION_CURR_ON_PRB	Probation: Currently on Probation	Lists employees that have a particular, active type of probation.
WI_HR_PP_PROBATION_ENDING	Probation Ending	Lists employees whose probationary periods are ending within the specified date range.
WI_HR_PP_RED_CIRCLE_IND	Red Circle Indicator	Lists employees that have an active red circle indicator.
WI_HR_PP_RESTOR_CURR_AT_RISK	Restoration: Currently At Risk	Lists employees that are currently at-risk – the At-Risk Flag is checked and the At-Risk Expiration Date is in the future.

WI_HR_PP_RESTOR_RIGHTS	Restoration: Current Restor Rights	Lists employees with current restoration rights.
WI_HR_PP_SEVERE_DISABILITY	Severe Disability	Lists all employees that are severely disabled.
WI_HR_PP_TESTS_CURR_ACTIV_TEST	Exams & Test: Current Active Tst	Lists employees who have a particular, current exam/assessment.
WI_HR_PP_TESTS_DUE_FOR_TEST	Exams & Test: Due for Another Tst	Lists employees that are due for an exam/assessment within the specified date range.
WI_HR_PP_VACCINE_CURR_ACTIV	Vaccine: Current Active	Lists employees who have a particular, current vaccination.
WI_HR_PP_VACCINE_DUE	Vaccine: Due for Another	Lists employees due for a particular vaccine within the specified date range.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

Serving People Who Serve Wisconsin

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
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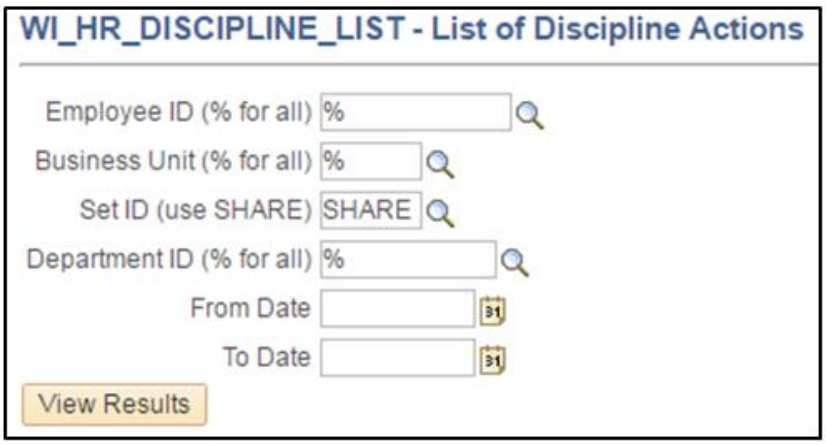
4.2 Discipline Data Query

Running the Discipline Data Query
Reviewing the Discipline Data Query Results
Discipline Data Query FAQS

Running the Discipline Data Query

General information on how to run a query can be found in the following job aid: http://starconnection.wi.gov/Documents/JobAids/Shared/runreport.pdf

1. Navigate to **Query Viewer** and enter the name of the query
    - Main Menu > Reporting Tools > Query > Query Viewer
    - STAR developed a query to return all data associated with disciplinary actions tracked in STAR HCM. The name of the query is **WI_HR_DISCIPLINE_LIST**



2. Enter the search criteria
    - Employee ID: Enter an employee ID to return results for a specific employee. To return all employees, enter a percentage sign (%).
    - Business Unit: Enter a business unit to return results for a specific agency. To return all business units, enter a percentage sign (%).
    - Set ID: Leave as SHARE.
    - Department ID: Enter a department ID to return results for a specific department ID. To return data for all department IDs, enter a percentage sign (%).
    - From Date and To Date: Enter a date range. This date is based on the disposition date of the disciplinary action.

Query results are limited by the user's row-level security. Users will not be able to return results for disciplinary actions that they do not have access to.

3. Click **View Results**

Reviewing the Discipline Data Query Results

A. Employee ID
B. Name
C. Discipline ID
D. Business Unit
E. Business Unit Description
F. Department ID
G. Department Description
H. Incident Date
I. Disposition Date

K. Description
L. Discipline Type
M. Violation
N. Description
O. Discussed With
P. Comments



Discipline Data Query FAQS

1. **Why does it show "No matching values were found"?**
   Your search criteria is too narrow, and there aren't any disciplines in the system that match your criteria. Replace your criteria with a % to return all results.
2. **Why is the same discipline on multiple lines?**
   Each work rule violation is on its own line, and this creates multiple rows for one disciplinary action. Unfortunately this is a limitation with PeopleSoft Query functionality.
3. **Is there a Discipline Tracking job aid?**
   Yes, on STAR Connection: http://starconnection.wi.gov/Documents/JobAids/HCM/QuickReferenceGuides/disciplinetracking.pdf
4. **Who can run this query?**
   Any core user can run the query, but the only users who will receive results are those with the Discipline security role.

This page last updated in Release Number: 17-01
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Effective Date: 10/02/17

4.3 Grievance Data Query

Running The Grievance Data Query
Reviewing The Grievance Data Query Results
FAQs

Enhanced *grievance* tracking functionality was added to STAR PeopleSoft in November 2016. This job aid provides instructions on how to run and review the Grievance Data Query.

Running The Grievance Data Query

Note: *General information on how to run a query can be found in the following job aid:* *http://starconnection.wi.gov/Documents/JobAids/Shared/runreport.pdf*

1. Navigate to **Query Viewer** and enter the name of the query
   - Main Menu > Reporting Tools > Query > Query Viewer
   - STAR developed a query to return all data associated with disciplinary actions tracked in STAR HCM. The name of the query is WI_HR_GRIEVANCE_LIST

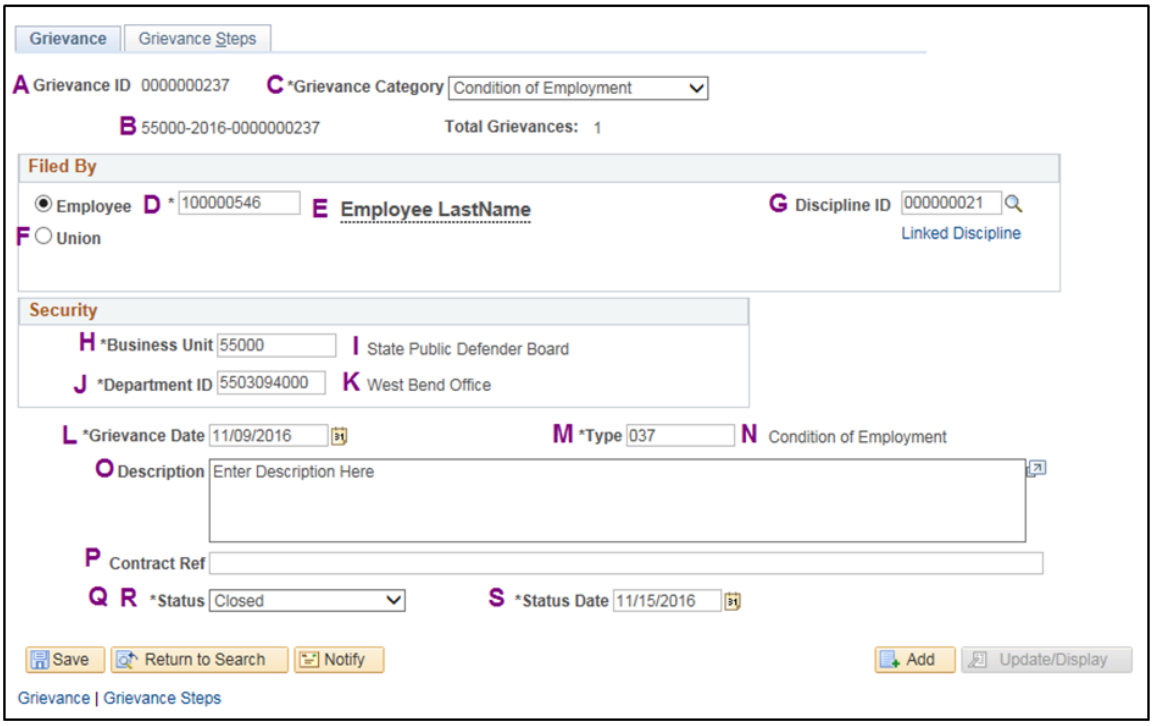


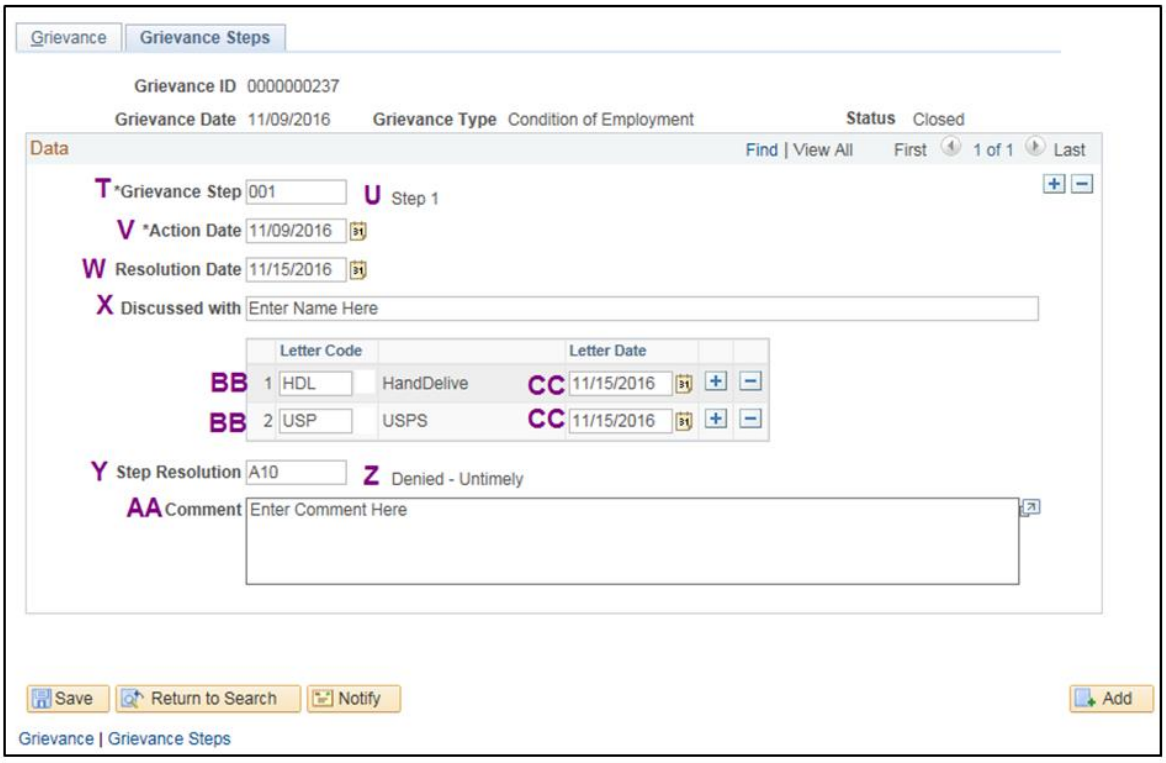
2. Enter the search criteria
   - Employee ID: Enter an employee ID to return results for a specific employee. To return all employees, enter a percentage sign (%).
   - Business Unit: Enter a business unit to return results for a specific agency. To return all business units, enter a percentage sign (%).
   - Set ID: Leave as SHARE.
   - Department ID: Enter a department ID to return results for a specific department ID. To return data for all department IDs, enter a percentage sign (%).
   - From Date and To Date: Enter a date range. This date is based on the disposition date of the disciplinary action.
   - Status: Select a status to return grievances with a specific status. To return all grievances regardless of status, leave blank.

Query results are limited by the user's row-level security. Users will not be able to return results for grievances that they do not have access to.

Reviewing The Grievance Data Query Results

A. Grievance ID
B. Grievance ID Ref
C. Grievance Category
D. Employee ID
E. Employee Name
F. Union Code
G. Discipline ID
H. Business Unit
I. Business Unit Description
J. Department ID
K. Department ID Description
L. Grievance Date
M. Grievance Type
N. Grievance Type Description
O. Description
P. Contract Reference
Q. Status
R. Status Description
S. Status Date
T. Grievance Step
U. Step Description
V. Action Date
W. Resolution Date
X. Discussed With
Y. Step Resolution
Z. Resolution Description
AA. Comment
BB. Letter
CC. Letter Date





	Griev ID	Grievance ID Ref	Grievance Category	Employee ID	Employee Name	Union Code	Discipline ID	Business Unit	Business Unit Description	Department ID	Department Description
1	0000000237	55000-2016-0000000237	Condition of Employment	100000546	Employee LastName		000000021	55000	Public Defender Board	5503094000	West Bend Office
2	0000000237	55000-2016-0000000237	Condition of Employment	100000546	Employee LastName		000000021	55000	Public Defender Board	5503094000	West Bend Office

Grievance Date	Grievance Type	Grievance Type Description	Description	Cntrct Ref	Status	Status Description	Status Date	Griev Step	Step Description	Action Date
11/09/2016	037	Condition of Employment	Enter Description Here		C	Closed	11/15/2016	001	Step 1	11/09/2016
11/09/2016	037	Condition of Employment	Enter Description Here		C	Closed	11/15/2016	001	Step 1	11/09/2016

Action Date	Resolution Date	Discussed With	Step Resolution	Resolution Description	Comment	Letter	Letter Dt
11/09/2016	11/15/2016	Enter Name Here	A10	Denied - Untimely	Enter Comment Here	HDL	11/15/2016
11/09/2016	11/15/2016	Enter Name Here	A10	Denied - Untimely	Enter Comment Here	USP	11/15/2016

FAQs

1. **Why does it show "No matching values were found"?**
   Your search criteria is too narrow, and there aren't any grievances in the system that match your criteria. Replace your criteria with a % to return all results.
2. **Why is the same grievance on multiple lines?**
   Each step and letter code is on its own line, and this creates multiple rows for one grievance. Unfortunately this is a limitation with PeopleSoft Query functionality.
3. **Is there a Grievance Tracking job aid?**
   Yes, on STAR Connection:
   http://starconnection.wi.gov/Documents/JobAids/HCM/QuickReferenceGuides/grievancetracking.pdf
4. **Who can run this query?**
   Any core user can run the query, but the only users who will receive results are those with the Grievance security role.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

4.4 Workforce Diversity Report

Purpose
Security
Running The Report

Reviewing The Report

Purpose

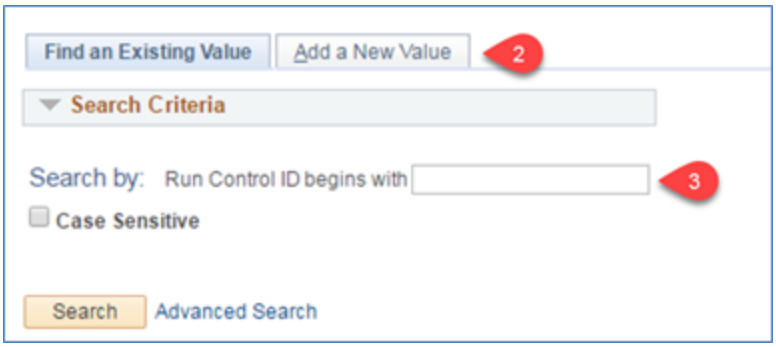
The Workforce Diversity Report can be used as a tool to balance interview panels as well as produce workforce metrics regarding employees who are female, minority, disabled, and/or a veteran.

Security

Users with the HR Display Only or HR Specialist security role will have access to run and view this report. The output is limited by the users' row-level security.

Running the Report

1. Navigate to Main Menu > State of Wisconsin (STAR) > Human Resources > Reports > Workforce Diversity Report
2. Add a Run Control ID by clicking Add a New Value or search for an existing one.



3. Enter the Run Control ID

A Run Control ID is used to save search parameters. Run Control IDs are linked and stored by IAM (you only see your own). Users can have any number of Run Control IDs and can follow any naming convention provided no spaces or special characters are used. Run Control IDs cannot be deleted, but saved parameters can be changed.



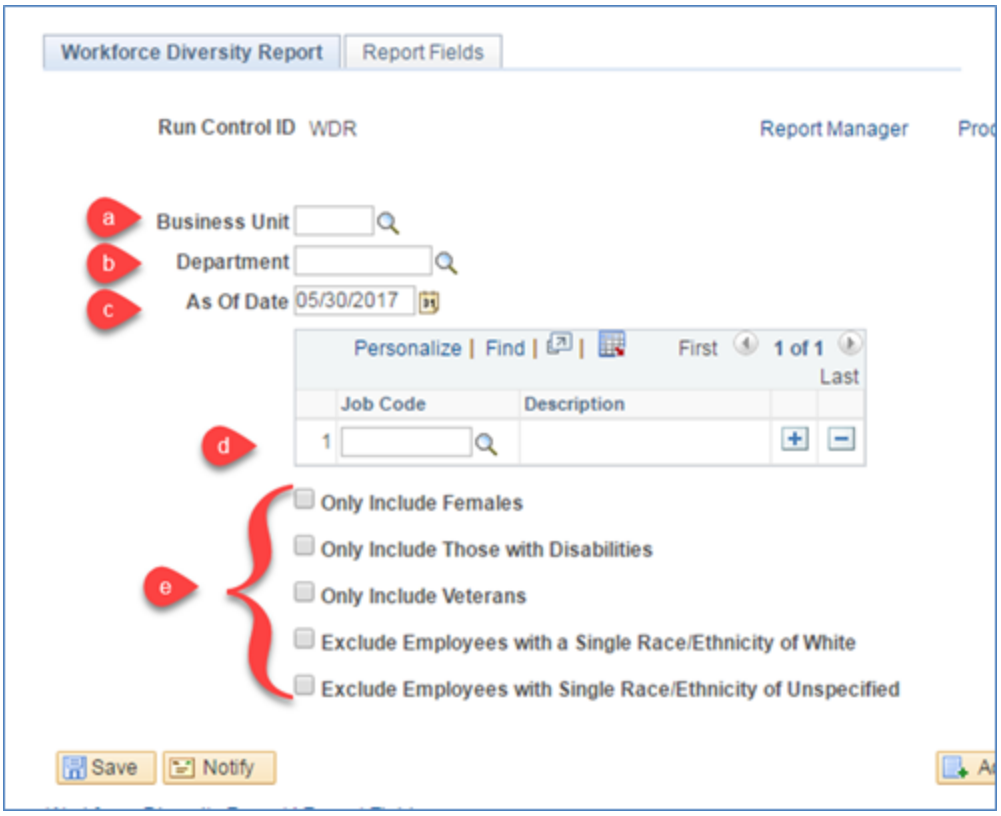
4. Click Add
5. Enter applicable search parameters on the Workforce Diversity Report tab
    a. Business Unit (optional): Enter the 5-digit agency code

    Output is limited to the user's row-level security. Users who serve more than one agency may leave the business unit blank to return information for all agencies they have access to.
    b. Department (optional): Enter the 10-digit department ID
    c. As of Date: Enter the date that will be used to pull back the information.
    d. Job Code (optional): Enter or search for the job code

i. To include additional job codes, click the plus sign (+) to add a row.

ii. To remove a job code added in error, click the minus sign (-) to remove a row.

    c. Checkboxes


Workforce Diversity Report
Report Fields
Run Control ID WDR
Report Manager
a
Business Unit
b
Department
c
As Of Date 05/30/2017
Personalize | Find | First 1 of 1 Last
Job Code
Description
d
1
e
Only Include Females
Only Include Those with Disabilities
Only Include Veterans
Exclude Employees with a Single Race/Ethnicity of White
Exclude Employees with Single Race/Ethnicity of Unspecified
Save
Notify

6. Select applicable information to return on the Report Fields tab
    a. Fields will default as selected. Uncheck the box to not include the field in the output.

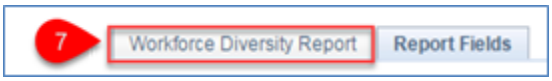
    b. To select all fields, click the Select All button

    c. To deselect all fields, click the Deselect All button

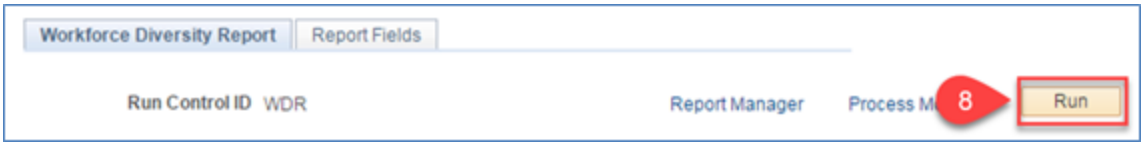




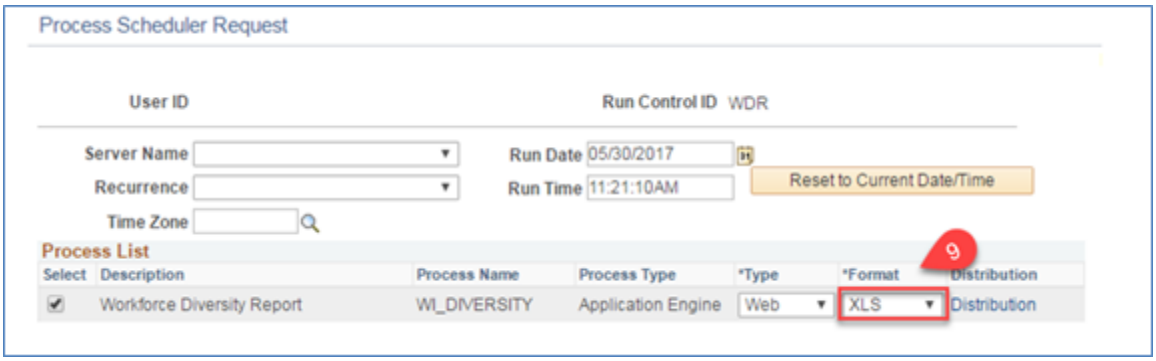
7. Return to the search parameters screen by clicking the Workforce Diversity tab



8. Click Run

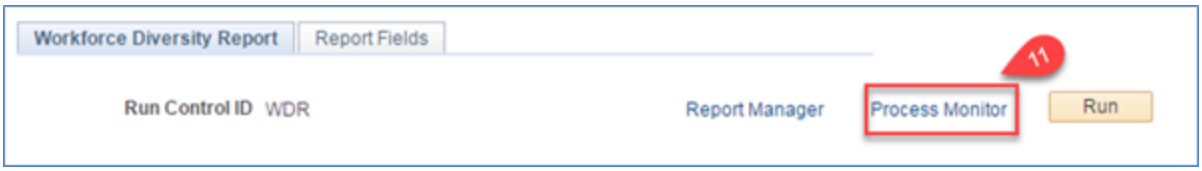


9. Change the format to XLS to produce the report in Excel

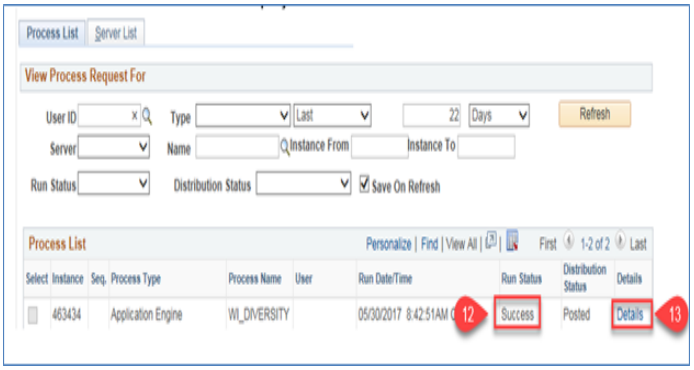


10. Click OK

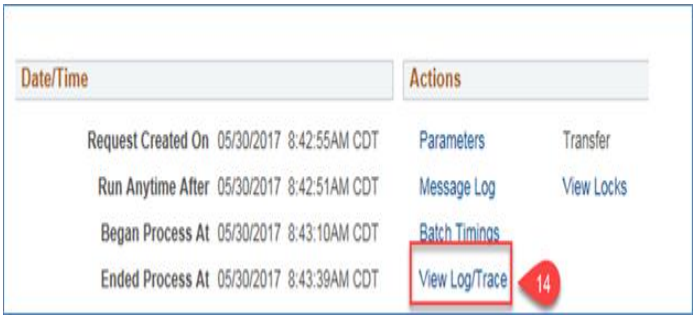
11. Click the Process Monitor link on the search parameters screen



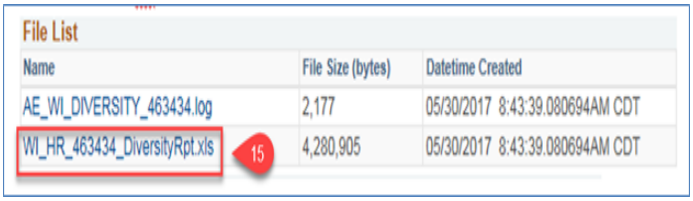
12. Wait until the Run Status displays as Success



13. Click the Details link
14. Click View Log/Trace



15. Click the .xls file

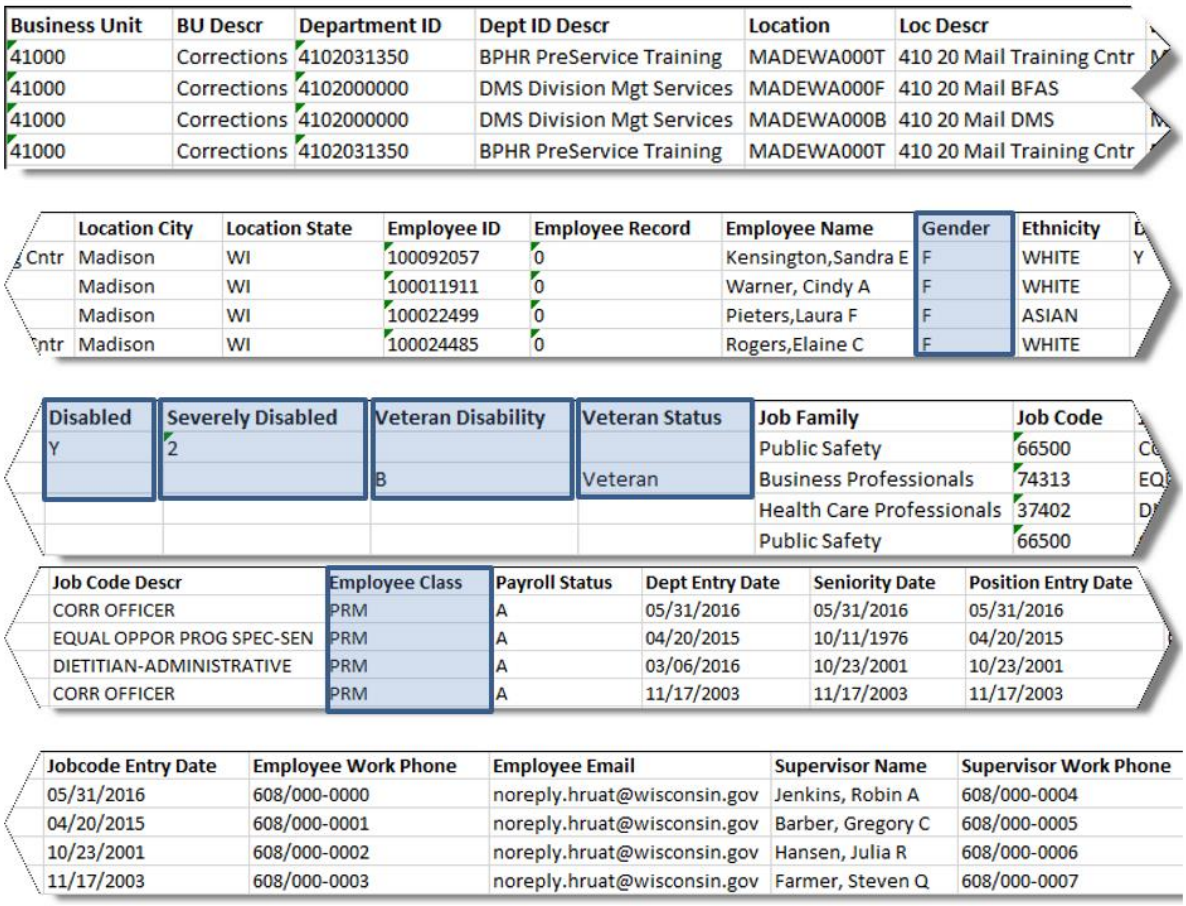


Reviewing the Report

1. The first 18 lines of the report output display the user's search criteria

	A	B
1		
2		
3	Process Name	WI_DIVERSITY
4	Database Name	PHRUAT
5	Process Instance	463434
6	Process DateTime	30-May-2017-8:43 AM
7		
8	Run Paramters	
9	Operator ID	
10	Business Unit	41000
11	Dept ID:	
12	As Of Date:	2017-05-30
13	Job Code:	
14	Female:	Y
15	Exclude White:	N
16	Disabled:	N
17	Veteran:	N
18	Exclude Unspecified Ethnicity:	N

2. Field Output



Business Unit	BU Descr	Department ID	Dept ID Descr	Location	Loc Descr
41000	Corrections	4102031350	BPHR PreService Training	MADEWA000T	410 20 Mail Training Cntr
41000	Corrections	4102000000	DMS Division Mgt Services	MADEWA000F	410 20 Mail BFAS
41000	Corrections	4102000000	DMS Division Mgt Services	MADEWA000B	410 20 Mail DMS
41000	Corrections	4102031350	BPHR PreService Training	MADEWA000T	410 20 Mail Training Cntr

	Location City	Location State	Employee ID	Employee Record	Employee Name	Gender	Ethnicity	D
Cntr	Madison	WI	100092057	0	Kensington,Sandra E	F	WHITE	Y
	Madison	WI	100011911	0	Warner, Cindy A	F	WHITE	
	Madison	WI	100022499	0	Pieters,Laura F	F	ASIAN	
ntr	Madison	WI	100024485	0	Rogers,Elaine C	F	WHITE	

Disabled	Severely Disabled	Veteran Disability	Veteran Status	Job Family	Job Code
Y	2			Public Safety	66500
		3	Veteran	Business Professionals	74313
				Health Care Professionals	37402
				Public Safety	66500

Job Code Descr	Employee Class	Payroll Status	Dept Entry Date	Seniority Date	Position Entry Date
CORR OFFICER	PRM	A	05/31/2016	05/31/2016	05/31/2016
EQUAL OPPOR PROG SPEC-SEN	PRM	A	04/20/2015	10/11/1976	04/20/2015
DIETITIAN-ADMINISTRATIVE	PRM	A	03/06/2016	10/23/2001	10/23/2001
CORR OFFICER	PRM	A	11/17/2003	11/17/2003	11/17/2003

Jobcode Entry Date	Employee Work Phone	Employee Email	Supervisor Name	Supervisor Work Phone
05/31/2016	608/000-0000	noreply.hruat@wisconsin.gov	Jenkins, Robin A	608/000-0004
04/20/2015	608/000-0001	noreply.hruat@wisconsin.gov	Barber, Gregory C	608/000-0005
10/23/2001	608/000-0002	noreply.hruat@wisconsin.gov	Hansen, Julia R	608/000-0006
11/17/2003	608/000-0003	noreply.hruat@wisconsin.gov	Farmer, Steven Q	608/000-0007

3. Field Codes

Gender Information from Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person, Gender drop-down	
F	Female
M	Male
U	Unknown

Disabled Information from Main Menu > Workforce Administration > Personal Information > *Disability* > Disabilities, Disabled Checkbox	
Y	Yes
Blank	No

Severely Disabled Information from Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles, Severe Disability Tab	
2	Severely Disabled
Blank	Not Severely Disabled

Veteran Disability Information from Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles, Veteran Disability Tab	
A	Vet with less than 30% service connected disability
B	Vet with at least 30% but less than 70% service connected disability
C	Vet with a 70% or greater service connected disability
D	Spouse of a disabled vet whose service connected disability is at least 70%
E	Disabled spouse of a disabled vet whose service connected disability is at least 70%
F	Severely disabled spouse of a disabled vet whose service connected disability is at least 70%
G	Unremarried spouse of a vet killed in action or a vet who died of a service connected disability
H	Disabled unremarried spouse of a vet killed in action or a vet who died of a service connected disability
I	Severely disabled unremarried spouse of a vet killed in action or a vet who died of a service disability
Blank	Not a disabled veteran

Veteran Status Information from Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person, Military Status drop-down	
Veteran	Veteran
Blank	Not a veteran

Employee Class

Information from Main Menu > Workforce Administration > Job Information > Job Data, Job Information tab *Note: Patient Workers and Offender Workers are excluded from this report*	
AMC	AmeriCorps
BDM	Board Member
ELC	Elected
LTE	Limited Term Employee
NGD	National Guard – Emergency
NON	Non-Employee
PPR	Project-Permanent
PRJ	Project-Project
PRM	Permanent
SNL	Seasonal
TBC	Teacher Board Certification
TRN	Trainee
ULE	Unclassified *LTE*
UNC	Unclassified
VSC	VISTA Service Corps

Payroll Status Information from Main Menu > Workforce Administration > Job Information > Job Data, Work Location tab	
A	Active
L	Unpaid Leave of Absence
P	Leave of Absence
S	Suspended

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

Contact Us

Serving People Who Serve Wisconsin

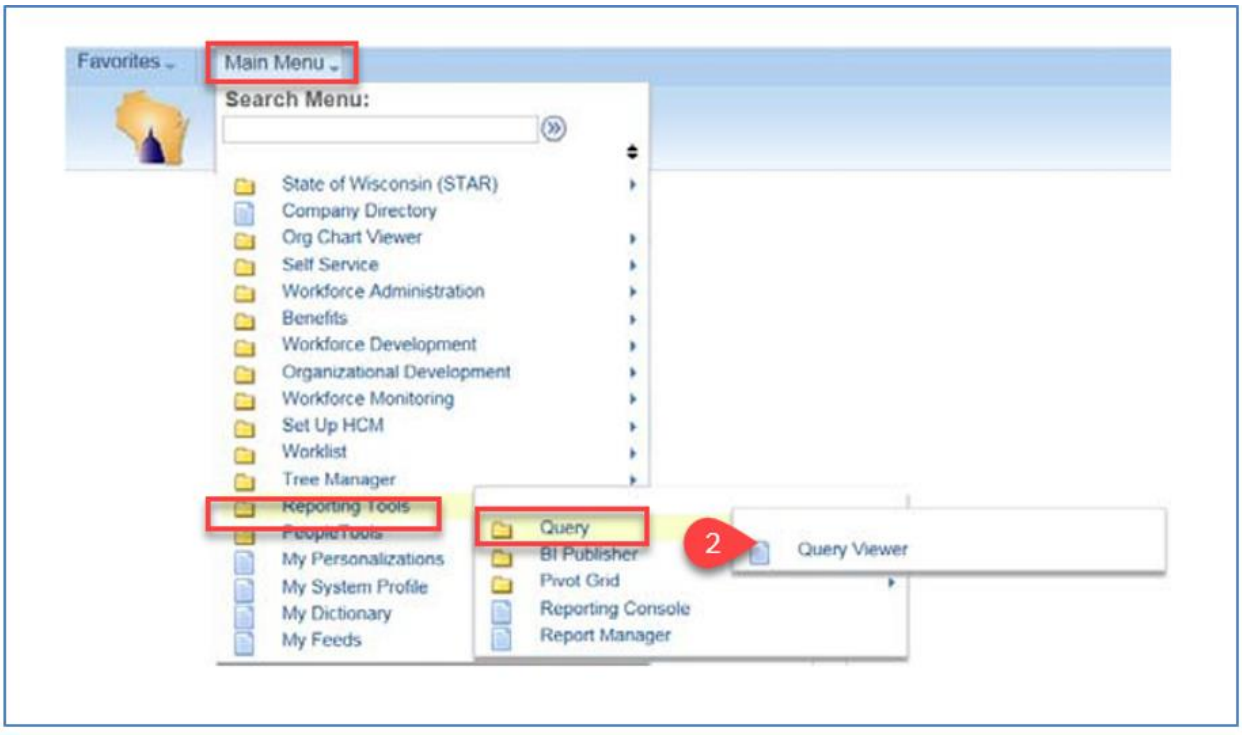
4.5 State Employee Roster Query

This chapter demonstrates how to search for an employee and their history with the State of Wisconsin using the Roster Query in STAR.

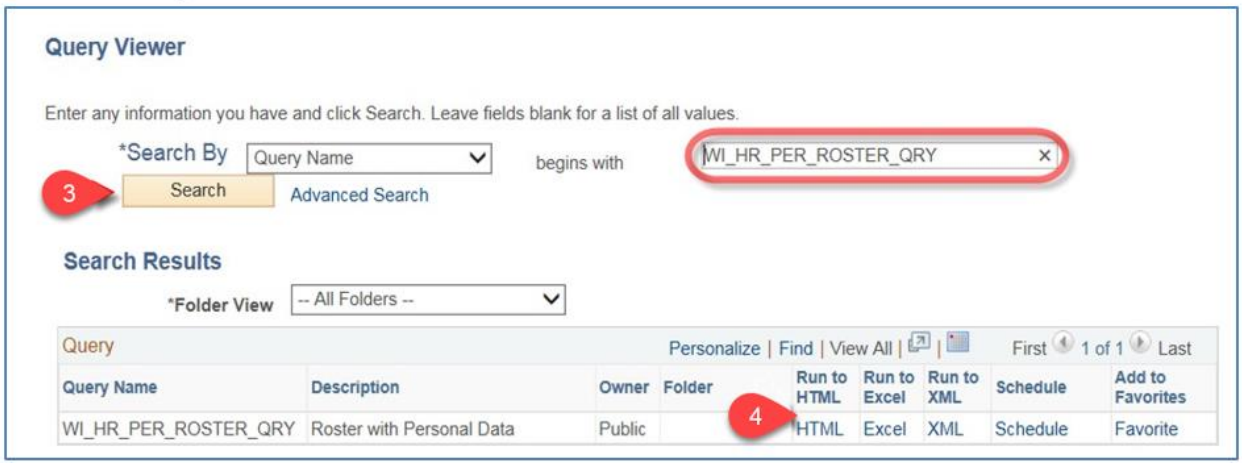
1. Log into STARHCM.wi.gov using your IAM Username and Password
2. Navigate: **Main Menu > Reporting Tools> Query> Query Viewer**



In order to view the Roster Query, users must have been assigned to the Roster role.



3. To find the Roster Query search for it by the query name: **WI_HR_PER_ROSTER_QRY**.
4. To view the query and select your search criteria click on the format you wish to view it in. Most often you will want to review the results in HTML.



If you chose to Run to Excel, only the results of your name, previous last name or SSN search will be displayed in the export – this will not include the individual transaction records for the specific employee you are searching for. To export individual transaction records for a specific employee chose HTML here and you can export to Excel later.

Do not select the query named **WI_OSR-JOB-VW**



5. Enter one of the following for the employee you are searching for:
   a. Last Name
   b. SSN
   c. Previous Last Name (see hint box**)
8. Click View Results to view a list of employees with matching Last Names, Previous Last Names or SSN.



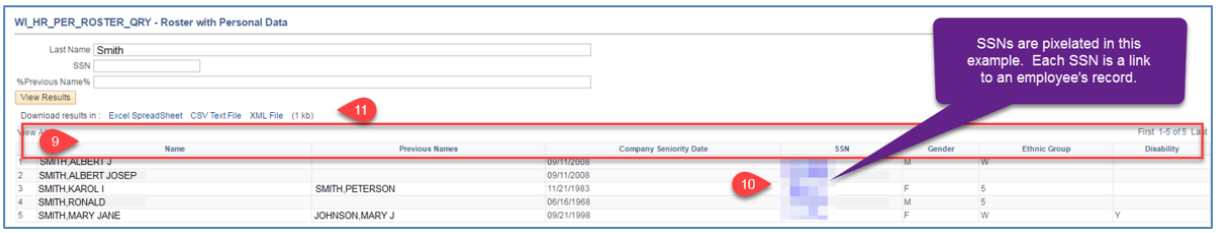
To search using either a partial Last Name or partial SSN use the % symbol

Example: To search for employees with a last name that starts with SMI enter **SMI%**.

Always use the % symbol before and after the previous last name to ensure all records are found.

9. The results of your Last Name, Previous Last Name or SSN search will include Name, Previous Name(s), Company Seniority Date, SSN, Gender, Ethnic Group, and *Disability*.

Previous names from the former OSER Roster will show as the former last name(s) only. Name changes that occurred within PeopleSoft will show as the entire former name including last, first and MI. This information will populate with any name change that has been made in the system.



10. To see the transaction records of a specific employee, click on their SSN.

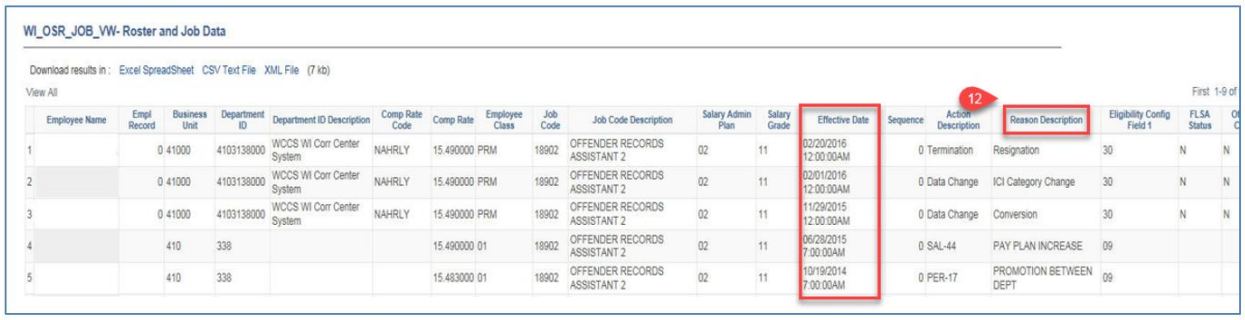
If an employee had a record in the legacy system and also has a record in PeopleSoft they may be listed twice in the results above. No matter which record you

select you'll be taken to the same data for that employee. Employees who do not have a SSN in the system will have XXXXXXXXX as a SSN. If you click on this, you will not see information for that employee

11. You can export your results from this view by clicking on the option you want to export to. This will only export the results as seen on this page – it will not export transaction records for each employee listed.

    To export individual transaction records for a specific employee, click on their NAME or SSN here and you can export to Excel later.

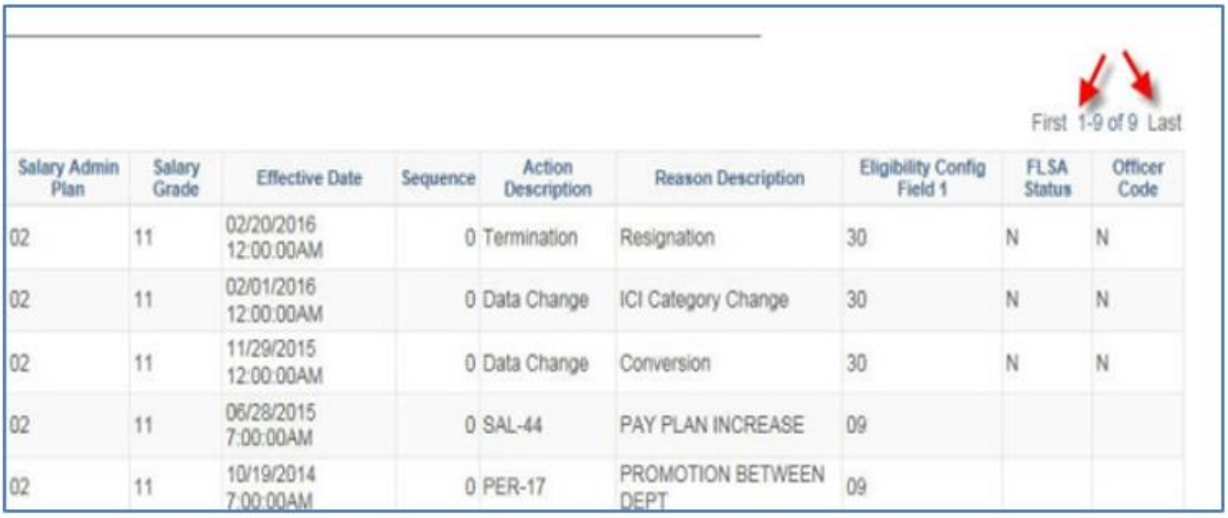
12. A new browser window will open and include the transaction records for your specific employee. Each transaction (Reason Description) should be listed in chronological order from newest to oldest.



Due to differences in fields and data between the legacy system and PeopleSoft some fields may be blank and some field data may be different depending on when the transaction occurred. For a complete listing of Action Descriptions and Reason Descriptions see the Action / Action Reason Matrix in the Appendix.

UW data was included in the data brought into PeopleSoft from the legacy system but will not be included in transactions from this point forward. UW employment history should always be verified with UW System.

13. If an employee has many rows of transactions they may roll over onto additional pages. To view more pages, click on the arrows next to the row numbers above the top right of the results.



First 1-9 of 9 Last

Salary Admin Plan	Salary Grade	Effective Date	Sequence	Action Description	Reason Description	Eligibility Config Field 1	FLSA Status	Officer Code
02	11	02/20/2016 12:00:00AM	0	Termination	Resignation	30	N	N
02	11	02/01/2016 12:00:00AM	0	Data Change	ICI Category Change	30	N	N
02	11	11/29/2015 12:00:00AM	0	Data Change	Conversion	30	N	N
02	11	06/28/2015 7:00:00AM	0	SAL-44	PAY PLAN INCREASE	09		
02	11	10/19/2014 7:00:00AM	0	PER-17	PROMOTION BETWEEN DEPT	09		

14. You can export your results from this view by clicking on the option you want to export to. This will export the results as seen on this page – it will export transaction records for the specific employee listed.



Download results in : Excel SpreadSheet CSV Text File XML File (4 kb)

15. Additional Information:
    - Contingent Workers are no longer included in the query results.
    - Fields will be added to the roster query as needed.
    - Effective dates for any type of termination will be different between PeopleSoft rows and legacy rows. For legacy terminations, the effective date was the last day the employee was on payroll. For terminations in PeopleSoft, the effective date is the day after the employee's last day on payroll. For calculations such as reinstatement eligibility or adjustments to *continuous service*, one day should be subtracted from the effective date of any PeopleSoft termination.

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

State of Wisconsin
HCM User Guide
Release 07-01 October 2, 2017
Contact Us

4.6 STAR HCM Report/Query Search

Description
Searching For A Report

Description

The STAR Report/Query Search functionality is used to assist users in finding queries, reports, and lookup pages in PeopleSoft HCM. The reports/queries listed in this search tool are used enterprise-wide, and have been vetted centrally. In addition to this functionality, users may continue to find queries/reports through Query Viewer and the State of Wisconsin (STAR) navigation.

All HCM Core Users have access to this functionality.

Searching For A Report

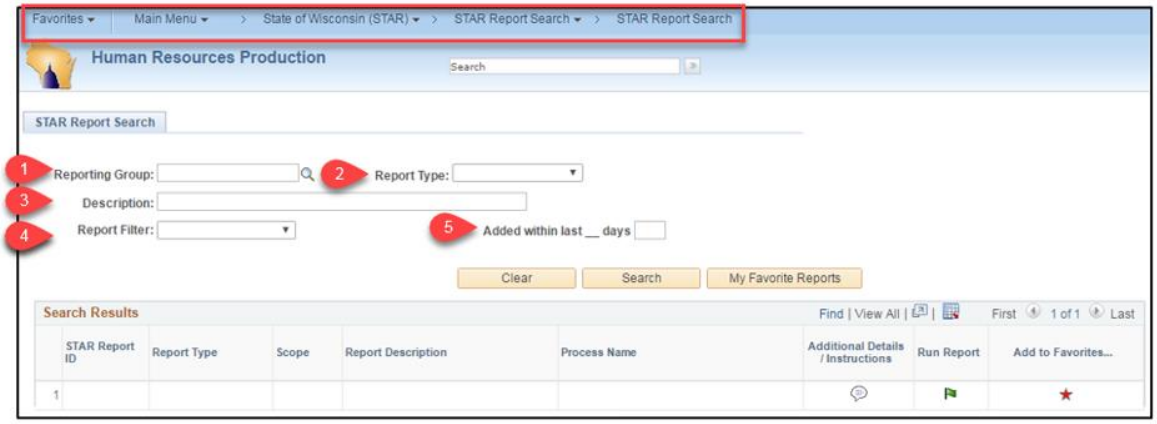
STEP 1: Navigate to: **Main Menu > State of Wisconsin (STAR) > STAR Report Search > STAR Report Search**

STEP 2: Enter your search criteria into one of the following fields. To return all results, leave all fields empty.

1. **Report Group:** Select an HCM module or business process
2. **Report Type:** Select PS Query, Report, or Summary from the drop-down
    a. **PS Query:** Typically produces data that is simply an output of what's been entered into STAR.
        i. Found through the Query Viewer (Main Menu > Reporting Tools > Query Query Viewer)
        ii. Examples: WI_HR_EMP_LEN_SERV,WI_TLDATA
    b. **Report:** Typically produces data that has complex logic built into it, and often has a specialized output format.

   i. Typically found through the State of Wisconsin (STAR) menu navigation (Main Menu > State of Wisconsin (STAR) > (module) > Reports)
   ii. Examples: Enterprise Personnel Report, *LTE* Hours Tracking Report
c. **Summary:** A lookup page that show information about an employee, position,etc.
   i. Examples: Review Position Information and Department Budget Table USA

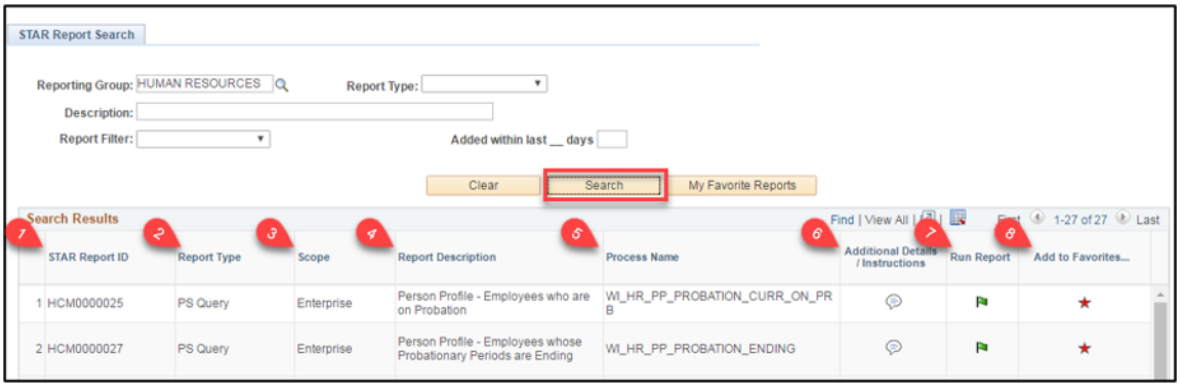
3. **Description:** Enter a word associated with the type of information in the report/query
   a. Examples: Person profile, FMLA
4. **Report Filter:** Select if the report/query is for a specific agency, the enterprise, or both an agency and the enterprise
   a. Note: As of July 2017, all queries/reports in this functionality are for the enterprise.
5. **Added within last _ days:** Enter a number in this box to find all queries/reports added to this functionality within the number of days you entered. Used to find new reports/queries.



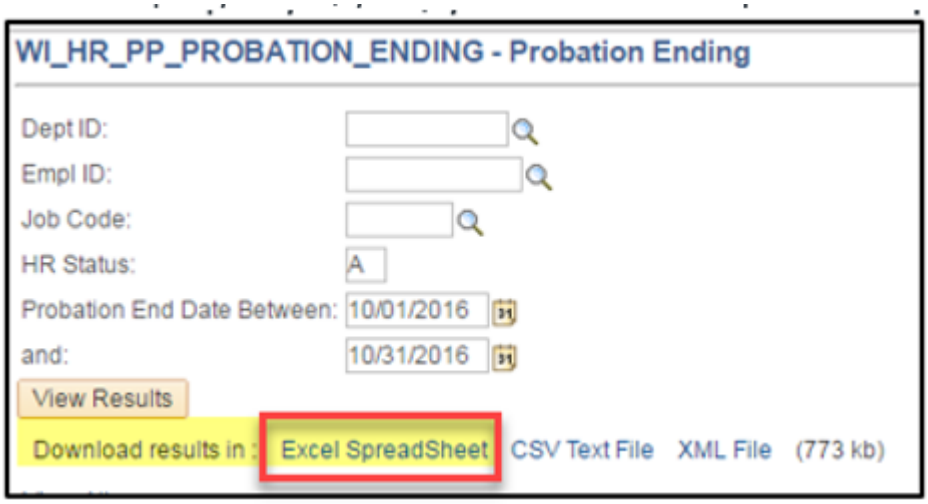
STEP 3: Click Search

1. **STAR Report ID:** A unique identifier assigned to the report/query when it gets added to this functionality
2. **Report Type:** PS Query, Report or Summary
   - This field is searched for using the Report Type drop-down
3. **Scope:** Enterprise, Agency, Agency and Enterprise
   - This field is searched for using the Report Filter drop-down
4. **Report Description**: Description of what type of information is in the report/query
   - This field is searched for using the Description search box.
5. **Process Name:**
   - For queries, this is the name of the query
   - For reports, this is the behind-the-scenes name of the report
   - For summary pages, this is the behind-the-scenes name of the page

6. **Additional Details/Instructions:** Click on the comment bubble icon to read more information about the purpose of the report/query, formation on how to run it, etc.
7. **Run Report:** Click on the flag icon to run the report/query



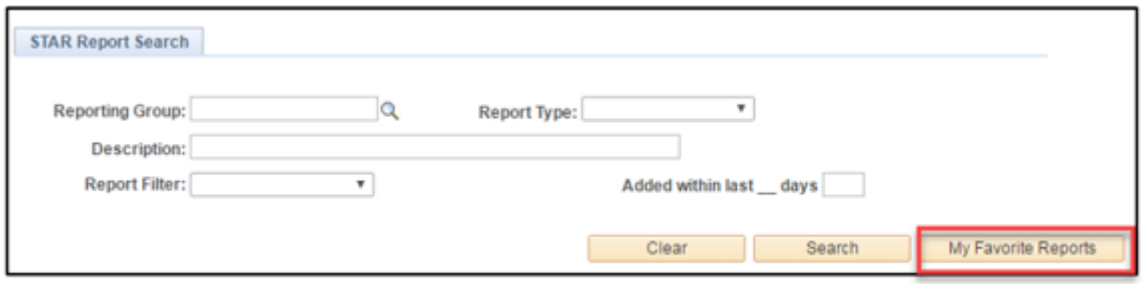
Once the query is run, you can click the Excel Spreadsheet link to export the results to Excel.



Users won't be able to run reports/queries without the proper security to the data.

8. **Add to Favorites:** Click the red star to add a report/query to your favorites in this functionality

Clicking the red star will not add a query to your favorites in Query Viewer. To search for queries/reports that are marked as favorites, click My Favorite Reports.



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

5 Appendix

5.1 PDF Versions of the Human Capital Management User Guide

A PDF version of the HCMUG is created with every release. This allows two things:

1. It allows a user to print the entire handbook, if necessary. This is discouraged since policy may become obsolete without the user knowing it. The online version is always the most up-to-date HCMUG.
2. It provides historical versions of the HCMUG. At times, it's necessary to see what the policy or process was for a prior date. If needed, you can view the PDF version of the HCMUG during that time period.

Releases are named with the year followed by the release number. For example, Release 17-04 is the 4th release of 2017.
If you want to print just a section of the current handbook, you can do that within the online version. Select the Print Icon in the upper right corner to print a section.

Release Number	Effective Dates
17-01	August 28, 2017 - present

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

5.2 Action/Action Reason Matrix

The chart below provides the action, reason, explanation, and status across Benefits, Payroll, and HR.

Active Reason Codes
Personnel Transaction Scenarios
Inactivated Action / Action Reasons

Active Reason Codes

Action Description	Action 3-letter code	Reason Description	Reason 3-letter code	Explanation
Add Contingent Worker	ADD	**Contingent Worker**	CWR	Used for adding into PeopleSoft contingent wor be used when a starting a new c the previous on be added if the concurrent con
Add Person of Interest	POI	**Add Person of Interest**	POI	Used for adding PeopleSoft. This reactivate a cor a new instance. Note: *Specific P be selected at t*
Completion	COM	**Completion**	COM	Used to end a c relationship. Th regardless of th ending (do not CWR or POI rela

Data Change	DTA	**Benefits Eligibility Configuration**	BEC	Used when any benefit eligibilit (Employee Class Date). This is al becomes eligibl lookback. This employee's ben even if the char transaction. Th any benefits eli a row or use thi error from a pre an entry error,
Data Change	DTA	**Change in Primary Job**	OPJ	When an emplo positions, one c be the primary Primary Job" is in the designati secondary posit Central Benefits are connected t instance.
 **Data Change**	DTA	**Conversion**	CNV	**Do Not Use.** All employees term the time of con job data conver Conversion. Th 11-29-2015.
 **Data Change**	DTA	**ICI Category Change**	ICI	Central Benefits change an emp Elg Fld 2) during period ONLY. T central mass jo should be no IC the annual upda
 **Data Change**	DTA	**ICI Deferred Enrollment**	DEF	Central Benefits indicate an emp Deferred Enroll 4 will be update job row is adde update process

Data Change	DTA	**Other Data Change**	ODC	Used for additio are not maintai when another a appropriate. *Note: This shou* *correction mod*
Data Change	DTA	**Surplus**	SUR	Used to *transfe* surplus position
Data Change	DTA	**Transfer Data Between Agencies**	TRF	Must be used w functionality by an employee in security. This ac a mechanism to number so the be moved to th ID security. This terminated emp change the Payr the employee. A must be created transaction (e.g *demotion*, etc.). made to these r submitted to de Request Job Ch again using the
Data Change	DTA	**Update Contractor's Supervisor**	CWS	Used to change the Reports To worker's job da
 **Demotion**	DEM	**Demotion - Legislature Only**	DEM	To be used by t
Demotion	DEM	**In Lieu of Layoff**	LLA	Used for the pe demotion in lieu
Demotion	DEM	**Involuntary**	INV	Used for the pe involuntary dem pay adjustment
Demotion	DEM	**Voluntary Between Agencies**	VBA	Used for the pe voluntary demo Requires separa applicable.

Demotion	DEM	**Voluntary Within Agency**	VWA	Used for the pe voluntary demo Requires separa applicable.
 **Hire**	HIR	**Conversion**	CNV	Do Not Use. All employees tern the time of con job data conver Conversion
Hire	HIR	**Hire from Affiliate**	HAF	Used when an e time in PeopleS another state p UWHC, Courts, NOT open to en be entered mar Pay rate is capt may not know E eligibility) at tra after HFA enter
Hire	HIR	**Hire No WRS**	NWR	Used when an e time in PeopleS instance is adde WRS service (ei covered by the separation bene WRS service). I eligible, this job benefits event i Action/Action r employee's elig contribution to Benefits Service Employment Da captured on thi Eligibility fields not correct whe ticket for correc prepare correct wrong.

Hire	HIR	**Hire Prior WRS**	PWR	Used when an e PeopleSoft for t employment ins employee has p the employee is will open a Hire must update Be Data - Employm WRS service da eligibility for the towards health correctly. The u reason does NO eligibility for the towards health Service date do this row. If the Benefits Service hire entered, su The HIR event the information
Layoff	LOF	**Seasonal**	SEA	Used for season at State Fair Par permanent emp rotation.
Layoff	LOF	**Temporary Layoff**	TMP	Used for emplo funded by feder government shu addition, this co layoff under ER or furloughs (sh future). This co permanent layo
		A Leave of Absence must be entered on an employee's job data		
Leave of Absence	PLA	**Adoption**	ADP	Used for emplo FMLA who are c adoption.
Leave of Absence	PLA	**Education**	EDU	Used when an e absence for edu
Leave of Absence	PLA	**Family and Medical Leave Act**	FML	Used for emplo FMLA.

Leave of Absence	PLA	**Maternity Leave**	MAT	Used for emplo FMLA who are maternity leave
Leave of Absence	PLA	**Medical**	MED	Used for emplo FMLA who are health/medical qualifying famil
Leave of Absence	PLA	**Military Service**	MIL	Used for emplo leave. Military unpaid.
Leave of Absence	PLA	**Paternity Leave**	PAT	Used for emplo FMLA who are paternity leave.
Leave of Absence	PLA	**Worker's Comp**	WKC	Used when an e absence due to
Pay Rate Change	PAY	**Add-on or Supplemental**	ADD	Used when ther employee's add The different ty pay will be capt
Pay Rate Change	PAY	***Career Executive* Downward Movement**	CED	Used when a Ca pay changes du This row is adde transaction row
Pay Rate Change	PAY	**Career Executive Upward Movement**	CEU	Used when a Ca pay changes du This row is add transaction row
Pay Rate Change	PAY	**Comp Plan Adjustment - Restoration**	CPR	Used when an e or is otherwise changed due to have taken plac This row is adde Leave or Restor
Pay Rate Change	PAY	**Contractual Adjustment - Restoration**	CAR	Used when an e or is otherwise changed due to have taken plac This row is adde Leave or Restor
Pay Rate Change	PAY	**Demotion**	DEM	Used when pay demotion. This personnel trans

Pay Rate Change	PAY	**Equity**	EQU	Used for Base-b equity.
 **Pay Rate Change**	PAY	**Increase - Legislature Only**	INC	To be used by t
Pay Rate Change	PAY	**Market/Parity Adjustment 1**	MP1	Used when an e due to a Marke
Pay Rate Change	PAY	**Market/Parity Adjustment 2**	MP2	Used when an e due to a 2nd Ma the same date a Adjustment.
Pay Rate Change	PAY	**Merit**	MER	Used for Base-b
Pay Rate Change	PAY	**Pay Progression**	PRG	Used for rate ch progression.
Pay Rate Change	PAY	**Promotion**	PRO	Used when pay promotion. Thi personnel trans
Pay Rate Change	PAY	**Regrade due to *Reallocation***	REA	Used if there is result of a Reall after the positio added to the in position change
Pay Rate Change	PAY	**Regrade due to *Reclassification***	REC	Used if there is result of a Recla added after the has been added from the positio
Pay Rate Change	PAY	**Reinstatement**	REI	Used when an e due to a reinsta after the perso
Pay Rate Change	PAY	**Retention**	RET	Used for Base-b retention.
 **Pay Rate Change**	PAY	**Top of range - Legislature Only**	TOR	To be used by t
Pay Rate Change	PAY	**Trades Vacation/Pay Election**	TVS	Used when buil their annual sal election.
Pay Rate Change	PAY	**Transfer**	XFR	Used for pay ra transfer into a p change has bee added after the

		Position Changes should not be created directly on Job Data, these acti		
Position Change	POS	**Add Surplus**	ASU	On position dat position is creat only.
 **Position Change**	POS	**Change due to Survey**	SUR	**DPM** use only. when a position class and comp
Position Change	POS	**Classification**	CLA	On position dat position change Used on vacant facilitate a filled transaction. Fo see scenarios a
Position Change	POS	**FLSA Status Change**	FLS	On position dat FLSA status is ch either vacant or and approval m Management Sy TRD Workgroup incumbent's job Status Change c
Position Change	POS	**FTE Change**	FTE	On position dat FTE is changed. vacant or filled
Position Change	POS	**Funding**	FND	On position dat funding change on either vacan
Position Change	POS	**Job Reallocation**	JRE	On position dat reallocated whi *incumbent*. Rea separate pay ac filled positions adjustment acti if applicable.
Position Change	POS	**Job Reclassification**	JRC	On position dat reclassified whi incumbent. Rec separate pay ac filled positions adjustment acti if applicable.

Position Change	POS	**Max Headcount**	HDC	On position dat max headcount either vacant or
Position Change	POS	**New Position**	NEW	On position dat is created. Used
Position Change	POS	**Position Frozen**	PFR	On position dat slated for inacti incumbent in th positions only.
Position Change	POS	**Position Inactivated**	INA	On position dat inactivated. Ple be moved to a r this action/acti positions only.
Position Change	POS	**Position Status Change**	STA	On position dat action/reason is be used on eith
Position Change	POS	**Position Type**	TYP	On position dat type is changed only.
Position Change	POS	**Reorganization**	REO	On position dat changes as the approved under *state statute.*T more of the follow a division, or the co agency. (b) expans field operation uni office, bureaus, or of an office, bureau transfers between an office, bureau o transfers between reorganizations un letter from the Gov transaction. For re approval letter fro Administration mu For a reorganizati Department for inf the transaction.* C or filled position

Position Change	POS	**Restructure**	REO	On position dat Reorganization. Department on Budget Office A individual positi new place withi part of a formal department. Ca or filled position
Position Change	POS	**Term Date**	TRM	On position dat term date is cha positions only.
Position Change	POS	**Title Change**	TTL	On position dat title is changed. titles. Can be us positions.
Position Change	POS	**Transfer**	XFR	On position dat transferred to a legislative actio for mass transfe restructures or positions within data row of Tra will be required filled positions. vacant or filled
Position Change	POS	**Union Change**	UNI	On position dat union code is ch either vacant or
Promotion	PRO	**Between Agencies**	BEA	Used for the pe promotion betw separate pay ad
Promotion	PRO	**Original Appointment**	ORG	Used for the pe Original Appoin serving on origi appointed to a result of compe *Note: Pay upon* *transaction will* *compensation p* *Appointment. T* *a new original p* captured on thi

Promotion	PRO	**Within Agency**	WIA	Used for the pe promotion with Requires separa
Recall from Layoff	REC	**Recall from Layoff**	REC	Used when emp seasonal or tem the layoff. *Note* *employees who* *layoff (Termina* *is used.*
Rehire	REH	**Original Hire No WRS**	NWR	Used for rehirin reinstatement e original hires wi captured on the etc.) Pay rate is Review/update benefits service date as needed
Rehire	REH	**Original Hire Prior WRS**	PWR	Used for rehirin reinstatement e original hires. E job record (LTE, captured on thi Benefits Eligibil date and compa
Rehire	REH	**Rehire from Affiliate**	RAF	Used when rehi is coming from (ex. UW, UWHC eBenefits does benefits must b Benefits Special this row. Review fields, benefits seniority date a

Rehire	REH	**Rehire No WRS**	RNW	Used for rehires LTE hired into a class is capture Perm, Proj, etc. eligible, this job benefits event i Action/Action r employee's elig contribution to Benefits Service Employment Da captured on thi Benefits Eligibili date and compa
Rehire	REH	**Rehire Prior WRS**	RPW	Used for rehires service. Empl cl record (LTE, Per employee is WR open a Hire ben must update Be Data - Employm WRS service da eligibility for th towards health correctly. The u reason does NO eligibility for th towards health Service date do this row. Review fields, benefits seniority date a
Rehire	REH	**Rehire within 30 days**	R30	Used when rehi terminated less benefits should ticket for Centra review/reinstat in error. Pay ra

Rehire	REH	**Reinstatement**	REI	For employees former classifica the eligible time greater than 30 Need to update the employee is will open a Hire Pay rate is capt Review/update benefits service date as needed
Rehire	REH	**Restoration**	RES	Used when an e a layoff during t period. There n day break in em service dates in WRS eligible, th benefits event i on this row sho former rate, wit adjustments. If needed, an add should be adde Comp Plan Adju Rate Change – C Restoration) F Eligibility fields, company senior
Retirement	RET	***Disability*** **Retirement**	DIS	Used when med employee to re eligibility deter third party.
Retirement	RET	**In Lieu of Layoff**	ILL	Used when an e lieu of permane with benefits ev continue for 3 a employee rema contribution to
Retirement	RET	**Retirement**	RET	Used when an e service. The act differently than and processing.

Return from Leave	RFL	**Return from Leave**	RFL	Used when an e an unpaid or pa Requires separ applicable.
Terminated with Benefits	TWB	**Appeal**	APP	Used when an e termination. Al maintain health
Terminated with Benefits	TWB	**Layoff**	LAY	Per 230.34(2) - with permanen Allows the emp insurance durin
Terminated with Benefits	TWB	**Terminated with Benefits**	TWB	Used when an e rehired within 3 eligible position
 The effective date of a termination should be the day fol Example – if the term effective date is July 1st, PeopleSoft v				
Termination	TER	**Accepted Offer – Did Not Start**	DNS	Used when a hi PeopleSoft, and the position aft accepted. NOTE: *The effec should be the sc*
Termination	TER	**Death**	DEA	Used when an e a current emplo should be the d death.
Termination	TER	**Discharge - Probation**	DPR	Used when an e during their *pro*
Termination	TER	**End Benefits**	EBN	Used to end hea employees who insurance due t termed with a T action). The eff of the month in longer has activ

Termination	TER	**End LTE Appointment**	ELA	Used to termina appointment en hours limit) and have a successiv scenarios at the further instruct have a successiv
Termination	TER	**End project appointment**	EPA	Used to termina employee does project appoint end of this job a the employee **D** appointment.
Termination	TER	**Job Abandonment**	JOB	Used when an e to job abandonm
Termination	TER	**Misconduct**	CON	Used when an e misconduct.
Termination	TER	**Other work private**	OWP	Used when an e because they ar job in the privat
Termination	TER	**Release LTE**	RLT	Used when an L appointment en
Termination	TER	**Resignation**	RES	Used when an e because they've
Termination	TER	**Staff Reduction**	RED	Used for LTE, pr (original) emplo are not eligible eligibility. This termination of u eligible for layo being eliminate
Termination	TER	**Transfer to Affiliate**	TAF	Used when an e another state p UW, UW Hospit
Termination	TER	**Unable to Perform Job Duties**	PJD	Used when a te employer when perform the ess position. Examp duty or for med
Termination	TER	**Unsatisfactory Performance**	UNS	Used when an e to unsatisfactor

Transfer	XFR	**Between Agencies**	BEA	Used when an e PeopleSoft tran Requires separa applicable.
Transfer	XFR	**Career Executive Downward Movement**	CED	Used for the pe Career Executiv Requires separa applicable.
Transfer	XFR	**Career Executive Lateral Movement**	CEL	Used for the pe Career Executiv Requires separa applicable.
Transfer	XFR	**Career Executive Upward Movement**	CEU	Used for the pe Career Executiv Requires separa applicable.
Transfer	XFR	**Reinstatement**	REI	Used for the pe active employe held *pay schedu* This action sho level of the rein separate pay ad applicable.
Transfer	XFR	**Restoration**	RES	Used for the pe active employe should be used restoration. The should be set to without interve intervening adju additional pay r added. (See Pay Adjustment – R Change – Contr Restoration)
Transfer	XFR	**Transfer-Terminate Project Appointment**	TPA	Used when an e appointment ar another project Project to Proje
Transfer	XFR	**Transfer in Lieu of Layoff**	TLL	Used for the pe an employee tr

Transfer	XFR	**Transfer-Terminate LTE Appointment**	TLA	Used when an e appointment ar another LTE app to another **LTE**
Transfer	XFR	**Within Agency**	WIA	Used for the pe an employee tra Requires separa applicable.
Unpaid Leave of Absence	LOA	**Filling Unclassified Position**	FUP	Used when an e absence to fill a will not be paid while on leave. *Note: A new em to be added for appointment if*

Personnel Transaction Scenarios

The chart below shows examples of how to handle employee movements that are not transfers, promotions, or demotions.

Scenario	Transaction(s)
Permanent Classified to Unclassified (Assumes immediate movement from one appointment to the next)	2 Transactions effective Sunday of the new pay period · Termination – Resignation* · Rehire – Rehire Within 30 Days [review/update Benefits Eligibility Fld 1 (WRS)]
Unclassified to Permanent Classified (Assumes immediate movement from one appointment to the next)	2 Transactions effective Sunday of the new pay period · Termination – Resignation* · Rehire – Rehire Within 30 Days [review/update Benefits Eligibility Fld 1 (WRS)]
Unclassified to Unclassified (Assumes immediate movement from one appointment to the next)	2 Transactions effective Sunday of the new pay period · Termination – Resignation* · Rehire – Rehire Within 30 Days
Permanent Classified to LTE	2 Transactions

(When the employee is hired within 30 days of their resignation)	· Termination – Resignation* · Rehire – Rehire Within 30 Days [review/update Benefits Elg Fld 3 (eligibility for employer contribution towards health)]
Project - Project to Permanent Classified (When the employee is hired within 30 days of their resignation)	2 Transactions · Termination – Resignation* · Rehire – Rehire Within 30 Days (review/update company seniority date)
Permanent Classified to Project – Project (When the employee is hired within 30 days of their resignation)	2 Transactions · Termination – Resignation* · Rehire – Rehire Within 30 Days
LTE moves to another **LTE** position • Note: If there is a break of more than one pay period, the LTE appointment should be termed and rehired.	1 Transaction: · Transfer - Transfer – Term LTE Appointment
LTE (who is enrolled in the WRS) moves to a **Permanent** position	2 Transactions: · Termination - End LTE Appointment* · Rehire - Rehire within 30 Days [review/update Benefits Eligibility fields (will likely delete Elg Fld 3 value) and company seniority date]
LTE (who is not enrolled in the WRS) moves to a **Permanent** position	2 Transactions: · Termination - End LTE Appointment* · Rehire - *Select applicable reason* (review/update Benefits Eligibility fields, benefits service date and company seniority date)
Project-Project to Project-Project	Movement depends on if the employee is eligible to keep their *continuous service* · Not eligible to keep continuous service: o Term and Rehire o Effective date of the Rehire is Monday of beginning of pay period (adjust company seniority date) · Eligible to keep continuous service: o Transfer – Transfer Term Project Appointment

	o Effective date is Sunday of beginning of a pay period o Pay rate change should be on **transfer row**

* Delete TER event from BAS Activity Table prior to 7pm of the date of entry (otherwise benefits will be terminated)

- Do not add a separate pay rate change row for Hire, Rehire, or Original Appointment transactions
- Do not add a separate pay rate change row for Transfer – Transfer Term LTE Appointment and Transfer – Transfer Term Project Appointment transactions
- When no break in continuous service, Termination row and Rehire row should have same effective date (Sunday) – increase the sequence
- If the rehire following a term will be at a different agency, , sending agency must enter term prior to receiving agency using the "People Steal"
-  **IMPORTANT:** When using a Termination action in conjunction with the Rehire – Rehire Within 30 Days action/action reason, you must delete the TER event by 7pm on the day that it is entered.
    - o Use "Rehire – Rehire within 30 days" action/action reason for employees who already have benefits, including WRS.
    - o This reason will open HFA event to Benefits Administrator and carry through the employee's current elections.
    - o Using any other Rehire Action/Action Reason may result in benefits event opening to employee and the employee's benefits terming if already enrolled

Filled Position Transfers

When a filled position has changed to a degree that requires competition and an employee competes for and is hired into their same position number. The following steps are needed to enter the transaction.

1. Update position to reflect the new classification, using the reason of Classification. If the FLSA status is also changing this should be done on this row. The effective date should be the day the transaction will be effective.
2. Enter the personnel transaction on the job data with the same effective date - Transfer-Within Agency.
3. Add a Pay Rate Change-Transfer job data row, if applicable
4. Add a Data Change-Benefits Eligibility Configuration row if applicable
5. Submit ticket for DPM to delete Position Change-Classification row from incumbent's job

Inactivated Action / Action Reasons

Action Description	Action 3-letter code	Reason Description	Reason 3-letter code	Explanation	Payroll Status	HR Status	Benefit Employ Status
Data Change	DTA	**Conversion**	CNV	****Inactivated – This reason was only used to convert employees into the system.** All active employees (and employees terminated within 45 days) at the time of conversion will have two rows of job data converted into PeopleSoft: Hire and Conversion. The conversion row is effective 11-29-2015.	Active	Active	Active
Terminated with Benefits	TWB	**Terminated with Benefits**	TWB	****Inactivated – Other specific Terminated with Benefits reasons are sufficient** Used when an employee with benefits is rehired within 30 days into a benefits-eligible position.	Terminated	Active	Termina with Benefit
Position Change	**POS**	**Delete Surplus**	DSU	****Inactivated – Use reason of Inactive (INA) to inactivate surplus positions** On position data, used when a surplus position is deleted. Used on vacant positions only.	Active	Active	Active

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

5.3 Best Practices



This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

5.4 Crosswalk Of Terminology Between Peoplesoft and HR

ABBR (Annual Benefits Base Rate)		Used to calculate premium and coverage level for ICI and SGL (must maintain separate ABBR for the two plans because they may not be the same amount)	Benefits
Absence Accrual	Earned Leave	Periodic calculation of actual entitlement earned	Payroll, Absence, Time & Labor
Absence Award	Leave Balance	Leave balances available for the employee to use	Payroll, Absence, Time & Labor
Absence Entitlement	Annual Leave	Calculated accrual or award for leave hours (what an employee is eligible to receive). Leave types that have associated balances to decrement when used, could have an accrual that adds to balance as awarded or earned, ie. Sick, vacation, term/sabbatical, FMLA	Payroll, Absence, Time & Labor
Absence Request	Recording leave time on timesheet	Method of entering leave, includes an Absence Type and Date(s)	Payroll, Absence, Time & Labor
Absence Take	The use of Leave Time	Defines the conditions that must be met before an employee can take paid time off	Payroll, Absence, Time & Labor
Account	OrgRA, fiscal string, etc.	A 6 digit mandatory chartfield that tracks, a set, revenue, and expense classifications	Position Management
Action	Transaction	Changes to employee data or status resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence	Payroll, Absence, Time & Labor
Action Code	Transaction Code	3 upper case characters in length. This is a required field that is used to indicate current	Payroll, Absence, Time & Labor

		empoloyee status. For example, HIR=hire, REH=rehire, PRO=*promotion*. The information contained within this field impacts Benefits and Payroll.	
Action/Reason	Transaction Code Description	Used to associate valid reasons to actions so that, when an action is inserted into an employee's data, a valid reason for the action can be added. The Action/Reason code combinations are used to process updates to employee Job Data records in the HCM Workforce Administration module.	Payroll, Absence, Time & Labor
AR Specialist	Payroll & Benefits Specialist	Abbreviation for receivables specialist. In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.	Payroll, Absence, Time & Labor
Base Pay	Base Pay/Hourly Rate	A pay component included in the job compensation calculation.	Payroll, Absence, Time & Labor
Batch Process	Batch Process	A means of processing a group of transactions instead of processing each transaction individually.	N/A
Benefit Deduction	Deductions	Deductions set up in Benefits Module (Med, WRS, ICI, etc.)	Payroll, Absence, Time & Labor
Benefit Event	Life Event	Can be automatically or manually created; evaluated by Benefits Administration to determine if there can/must be a change to benefit enrollments	Benefits
Benefit Event Status	N/A	Each Benefit Event is assigned a status that determines what an employee/benefits specialist can do (enroll, change, terminate benefits)	Benefits
Benefit Plan	Benefit Plan or Program	Specific Benefit Plans within a Benefit Plan Type (ex. Unity-UW Health, VSP Vision, State Group Life)	Benefits

Benefit Plan Type	Benefit Type	Benefit category or type of benefit (ex. Health, Savings, *Disability*, Life & Accidental Death)	Benefits
Benefit Program	Benefit Package or Program	Collection of Benefit Plans available to an employee – PeopleSoft will automatically assign employee to a Benefit Program based on eligibility criteria	Benefits
Benefit Program Participation Page	N/A	Page in Job Data/Workforce Administration where benefits eligibility fields must be completed so employee is assigned to correct Benefit Program	Benefits
Benefit Vendor Interfaces	N/A - mostly paper previously	Collection of programs that automatically send benefit enrollment & demographic info to vendors	Benefits
Benefits Administration	N/A	Nightly process that determines employee benefits eligibility based on eligibility rules, job changes and life events; also used to automate Open Enrollment	Benefits
Benefits Billing	N/A - previously billed through provider or ETF	PeopleSoft functionality that generates invoices and tracks personal payments for benefit premiums not taken through payroll deduction	Benefits
Benefits Service Date	WRS Start Date	Day employee began WRS service, often determined with a previous service check (State WRS service only)	Payroll, Absence, Time & Labor
Budget Reference	FY or Fiscal Year	Budget Year	Position Management
Business Unit	Agency or Department	Agency	Human Resources and eProfile
Chartfield	N/A	Field that captures information regarding the transaction	
Class (Appropriation)	Appropriation (APPR)	Appropriation	Position Management
Classified Indicator	Position Type	Position Type (*LTE*, Permanent, Surplus Code)	Position Management
Combination (Combo)	N/A	Value assigned to a specific	Time and Labor

Code		combination of chartfields	
Comp Rate Code	Add-ons, differential, etc.	Components of pay for an employee in addition to the employees base hourly wage	Human Resources and eProfile
Company Seniority Date	Adjusted Service Date (ASSD)	Adjusted Service Date - the employee's *continuous service* dated adjusted to remove any breaks in employment to State service	Human Resources and eProfile
Contingent Worker	Contractors	Contractors paid through PeopleSoft	Human Resources and eProfile
Core Schedule	Default Scheduled (Standard Schedule Code at DOT)	Also referred to as "flex schedule" in PS, it defines an employee workday by start and end ranges and total scheduled hours	Time and Labor
Deduction Codes		Each benefit plan assigned a deduction code – determines tax status and frequency of premium deductions	Benefits
Delegation/Proxy	Delegate to approve timesheets	Process to assign backup Supervisor for time approval responsibilities.	Time and Labor
Department	Division/Bureau	Org/Sub Org – hierarchical representation of the Agency	Human Resources and eProfile
Earning Code	Time Type	An identifier for Earnings that holds settings for taxation, calculation, etc. Links to a TRC generated in T&L	
eBenefits	Online module to enroll in all benefits	Allows employees to make benefit elections and add/enroll dependents online.	Benefits
Eligibility Configuration Fields	WRS Category; ICI Category	Eligibility fields on Benefit Program Participation Page (ex. WRS Category, ICI Category…)	Benefits
Eligibility Group		Determines which leave entitlements an employee is eligible for, assigned on the Payroll Tab of Job data, also determines the accrual/award rates for entitlements	Benefits
Employee Category	*Employing Unit*	Employing Unit	Human Resources and eProfile
Employee Class	Employee Type	Employee type (ex: permanent or project)	Human Resources and eProfile

Enrollment Confirmation Notice	N/A	PeopleSoft-generated notice that a Benefits Specialist can print for an employee when changes are made to the employee's benefits	Benefits
Event Rule	N/A	Rules that link a benefit event to a benefit plan type. The rule defines what benefit actions can be taken for a specific benefit event	Benefits
Finalize Absence	N/A	The process to close Absences for the current payroll	Payroll, Absence, Time & Labor
Forecasting	N/A	Validation of sufficient balance for Absence Request	Payroll, Absence, Time & Labor
General Deduction	Deductions	Miscellaneous deductions set up in Payroll Module (Parking, United Way, etc.)	Payroll, Absence, Time & Labor
Grade	*Pay Range*	Salary grade	Human Resources and eProfile
Inactive Position		Deleted Position	Position Management
Job Code	Class Code	Class Code from OSER Alphalist	Human Resources and eProfile
Job Code Description	Class Title	Class Title from OSER Alphalist	Human Resources and eProfile
Job Code Entry Date	Class start date	Start Date in Class	Human Resources and eProfile
Job Family	Job Group	Job Group from OSER Alphalist	Human Resources and eProfile
Job Function	Data Processing Code (DP Code)	DP (Data Processing) Code from OSER Alphalist	Human Resources and eProfile
Leave Donation	Catastrophic leave	Category to track leave donated one employee to another	
Location	Headquarters (Headquarter City)	Building where the employee is located	Human Resources and eProfile
Max Head Count			Position Management
Off-Cycle	Supplemental Check	Something - typically a check- which must be generated outside of the standard payroll process.	Payroll, Absence, Time & Labor
Officer Code	*Career Executive* Status	Career Executive Status	Human Resources and eProfile
On-Cycle	N/A	Standard payroll process.	Payroll, Absence, Time & Labor

One Time Pay Transactions	One time pay transactions	A program used by agencies to submit adjustments to paylines and by Central Payroll to review those transactions	Payroll, Absence, Time & Labor
Oracle Business Intelligence (OBI)	Business Objects	Report generating program used to analyze system data outside of standard reports.	N/A
Original Hire Date	Original hire date	First date employee entered state service	Human Resources and eProfile
Pay Calendar	Payroll Calendar	Created for every payrgroup for every paydate (26 per year), contains settings for the payroll such as begin/end dates, A, B, C setting, check date	Payroll, Absence, Time & Labor
Pay Group	Agency	Equals Agency	Payroll, Absence, Time & Labor
Pay Run ID		A unique identifier for a specific payroll, used to link all Pay Calendars to be processed together	Payroll, Absence, Time & Labor
Payable Time		Time after it has been processed and rules applied to create differentials, premiums and overtime. This is what supervisors will be approving.	Payroll, Absence, Time & Labor
Payline		Created every payroll for every active employee where earnings, deductions, and tax transactions are loaded	Payroll, Absence, Time & Labor
Paysheet		A group of paylines	Payroll, Absence, Time & Labor
PeopleSoft ID	Employee ID (DOT -HRC Number, DOC - EmpID)	Also known as EMPL ID (employee ID)	Payroll, Absence, Time & Labor
Person of Interest	Volunteers; Contractors	A non-employee who does not have a classification (ex: DMV Volunteer); Contractors that are not paid by PeopleSoft	Payroll, Absence, Time & Labor
Predefined Schedule	Schedule Code	Already created schedule (code)	Payroll, Absence, Time & Labor
PSHUP Table	N/A	The staging table that holds earnings, deductions, and expense transactions ready to load to Paylines	Time and Labor
Punch Time reporter	N/A	Clocks time based on punches in and punches out	Time and Labor
Reported Time	Time Recorded	Time as it is entered on the	Time and Labor

		timesheet	
Rule Elements	How we record our time i.e.: compensation time, holiday pay, etc.	Data assigned to an employee on Time Reporter Data used on the application of rules. Pay Add-ons (ex: overtime payout, night/weekend differential, responsibility differential, holiday premium payout method)	Time and Labor
Salary Grade	Pay Range	Pay Range	Human Resources and eProfile
Salary Plan	*Pay Schedule*	Pay Schedule	Human Resources and eProfile
Signature Authority		Authorization Source	Position Management
Speed Type	Project ID lookup	Shortcut to look up/enter valid combo codes	Time and Labor
Task Profile	N/A	A time distribution method which allows the employee to enter one value to represent a set of all chartfields	Time and Labor
Task Template	N/A	Configured to determine which fields are required/optional for task reporting, attached to taskgroups and task profiles	Time and Labor
Taskgroup	N/A	Assigned to the employee, controls available task distribution fields on Timesheet. Controls available task profiles	Time and Labor
Tax Location	Headquarters	The location which determines taxes based on where the employee works	Payroll, Absence, Time & Labor
Time and Labor	DOT -TEAL, DOC - CAPS, DHS - APS	Module of PeopleSoft used to track employee hours and distribution of their time.	N/A
Time Collection Device (TCD)	Time Clock	A method for collecting reported time outside of the online timesheet in Time and Labor	Time and Labor
Time Reporter Type	N/A	Determines the information an employee must provide for work hours on the timesheet, Punch or Elapsed	Time and Labor
Time Reporting Code (TRC)	Activity Code	Earnings type in Time and Labor, Absences takes are	Time and Labor

		mapped to TRCs and TRC are mapped to Earnings Codes in Payroll	
Time Reporting Template	N/A	Determines fields used for time entry and whether the timesheet will be used for task template or task profile reporting	Time and Labor
Workgroup	N/A	TL grouping of employees that share common attributes and rules (ex: overtime eligibility and any add-ons)	Time and Labor

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

5.5 GLOSSARY OF HUMAN RESOURCE TERMS AS USED BY THE DEPARTMENT OF ADMINISTRATION/DIVISION OF PERSONNEL MANAGEMENT

Foreword

This Glossary provides definitions for human resources terms used by Division of Personnel Management. **NOTE**: It is intended that this document will be updated as terminology, policies, statutes, codes, rules, and regulations are added, deleted, or changed. However, in the event this document is not updated timely, the relevant new or updated terminology, policy, statute, code, rule or regulation prevails.

1. In some cases, a definition is paraphrased or limited. The official language in the statute, code, rule, or regulation will prevail over paraphrased and/or limited definitions (definitions providing the official language is in quotation marks).

2. In all cases, when a statutory, code, policy, rule, or regulation reference(s) is provided, review the reference(s) to understand how the relationship fits to a particular situation.
3. In some cases there are terms following the definitions which can be used as a comparison/contrast reference.
4. Review the definitions provided in other documents to determine if those definitions differ from Glossary definitions.
5. This document will be updated as definitions change, new terms are developed, and as the references provided by state statutes, Wisconsin Administrative Code, Compensation Plan, Wisconsin Human Resources Handbook Chapters, DPM Bulletins, and applicable state and federal regulations change.

Human Resource References include, but are not limited to:
1. Ch.230, Wis. Stats.
2. Ch.. 111, Wis. Stats.
3. Ch.15, Wis. Stats.
4. Ch.20, Wis. Stats.
5. Ch.40, Wis. Stats.
6. ER Wisconsin Administrative Code
7. ER-MRS WisconsinAdministrative Code
8. Compensation Plan
9. Wisconsin Human Resource Handbook Chapters
10. DPM, OSER and P Bulletins
11. Federal Regulations for Fair Labor Standards Act (FLSA), Part 541
12. Federal Regulations and state law for Family and Medical Leave Act (FMLA)

Abbreviations:

1. s. , Wis. Stats. section, Wisconsin Statutes
2. Wis. Adm. Code Wisconsin Administrative Code
3. Comp. Plan, Sec. Compensation Plan, Section
4. WHRH Ch. Wisconsin Human Resource Handbook Chapter (formerly Wisconsin Personnel Manual)

GLOSSARY
OF HUMAN RESOURCES TERMINOLOGY

A A A

Ability: Sufficient mental and/or physical strength, energy, dexterity, or other qualifications and resources to perform particular arts, job responsibilities, duties, etc.

Ability to pay: The ability of an agency, dependent upon various funding sources, to pay a given level of wages or to fund a wage increase. This ability is a frequent issue in union contract negotiations.

Abuse of authority: "An arbitrary or capricious exercise of power." *See s. 230.80(1), Wis. Stats.; related Code of Ethics s. 19.41, Wis. Stats. Related to "arbitrary" and "capricious."*

Access laws: State statutes that require employers to allow employees access to their personnel files. *See s. 103.13, Wis. Stats*

Accommodation: To provide for or supply an adaptation or adjustment to the selection process for the purpose of taking an assessment.

Accountability: Answerable to another (usually a superior) for a work product typically performed by another (i.e., as the term is typically used: a subordinate is responsible for performing the worker activity and the supervisor is accountable to his or her superior for the successful accomplishment of that same worker activity). *Related to "breadth," "complexity," "depth," "discretion," "impact of work," "Knowledge Skills and Abilities," "point factor system," "scope," and "survey."*

Accretion: Whenever the state becomes responsible for the employees and functions previously administered by another governmental agency or a quasi-public or private enterprise, or when positions in the unclassified service, excluding employees of the legislature, are determined to be more appropriately included in the classified service, the affected positions shall be included in the classified service. *See s. 230.15(1m) (a), Wis. Stats.*

Accumulated sick leave conversion credits (ASLCC): The term used to refer to accumulated unused sick leave credits that are converted on behalf of an eligible employee for the purpose of payment of health insurance premiums.

Achievement History Questionnaire (AHQ): A historical examination method that requires applicants to describe, in narrative fashion, their main accomplishments, achievements, training or education, and experience in several critical job-related areas. Raters evaluate responses based on structured rating criteria (benchmarks). Questions are administered in an uncontrolled environment.

Across the board (ATB) increase: In its broadest sense, a base pay adjustment granted to all employees in a specified bargaining unit or nonrepresented employee

group, either in a flat rate such as cents per hour or as a percentage of salary, given to all eligible employees. The term has no specific statutory or contractual meaning as it relates to state employee pay adjustments, but is often used as a working term to refer to the wage adjustment that typically is granted in each fiscal year to the majority of or all employees in a particular group. *Similar to "base pay rate", "general wage adjustment", "pay adjustment", "regular rate", and "wage rate."*

Acting assignments: Job duties that are temporarily assigned to a permanent employee when the position is vacant and the needs of the service require the performance of the duties of the vacant position. Acting assignments typically do not exceed a total of six months. *See Ch. ER-MRS 32, Wis. Adm. Code; contrast with "incidental duties" and "temporary assignment."*

Active fire suppression or prevention: Job duties which involve the pre-suppression, suppression, and prevention of forest fires. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Active law enforcement: Job duties which involve the detection or prevention of crime, the enforcement of laws and ordinances, and the authority to make arrests for violations of the laws and ordinances the employee is employed to enforce. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Actual hours worked: The time actually worked by an employee, as opposed to scheduled hours or leave hours.

Add-on pay: An hourly amount paid in addition to the base pay in recognition of factors or conditions not reflected in the basic *pay range* or pay rate of a position. *See Comp. Plan Sec. A; similar to "differential pay," "night differential," "on-call pay," "premium rate," "pyramiding," "responsibility pay," "shift differential," "standby pay," "supplemental pay," and "weekend differential."*

Adjusted continuous service: The length of time in the most recent period in continuous state employment in either the unclassified service under s. 230.08(2), Wis. Stats., or as a permanent employee in the classified service or both, revised for certain breaks in state service.*See Ch. ER 18, Wis. Adm. Code*

Adjusted continuous service date (ACSD): The date on which an employee's current period of continuous service with the state is considered to have begun, with deductions for authorized breaks in service. *Frequently confused with "credible service" and "continuous service." Related to "continuous service."*

Administered Part: An assessment part that will be administered. Normally the Assessment Root is the only part that is considered the Administered Part; i.e., everything below that part will be administered/scored in the assessment.

Administration: The activity of management which fulfills or carries out the goals and objectives for which the organization was established.

Administrative: Administrative professional level work requires the exercise of analytical ability, judgment, and discretion and the application of a substantial body of knowledge of principles, concepts and practices applicable to one or more fields of administration or management. While these positions do not require specialized education, they do involve the type of skills (analytical, research, writing, judgment) gained through a college level education or through progressively responsible work experience. Administrative work may be performed as part of the principal mission or program of an agency or subcomponent, or it can be performed as a service function that supports the agency's mission or program. Employees engaged in administrative work are concerned with analyzing, evaluating, modifying, and developing basic programs, policies, and procedures that facilitate the work of agencies and their programs. They apply knowledge of administrative analysis, theory, and principles in adapting practice to the unique requirements of a specific program.

Administrative date for pay adjustments: The date on which pay adjustments are effective. With few exceptions, the administrative date of a pay adjustment is the first day of a pay period. *See s. 20.928(3), Wis. Stats.; collective bargaining agreements, comp. plan, or administrative rule provisions for specific adjustment.*

Administrative Employee: An employee who meets the requirements of the administrative exemption. *See WHRH Chap. 520, Administration of the Fair Labor Standards Act.*

Administrative professional level: Work that requires the exercise of analytical ability, judgment, and discretion and the application of a substantial body of knowledge of principles, concepts and practices applicable to one or more fields of administration or management. While these positions do not require specialized education, they do involve the type of skills (analytical, research, writing, judgment) gained through a college-level education or through progressively responsible work experience. Administrative professional level work may be performed as part of the principal mission or program of an agency or subcomponent, or it can be performed as a service function that supports the agency's mission or program. Employees engaged in administrative professional level work are concerned with analyzing, evaluating, modifying, and developing basic programs, policies, and procedures that facilitate the work of agencies and their programs. They apply knowledge of administrative analysis, theory, and principles in adapting practice to the unique requirements of a specific program.

Administrative supervision: Supervisory authority which is limited to the administrative aspects of the employee's activities, typically including such functions as communicating general agency policy, enforcing work rules, providing supplies or administrative services, responding to grievances, and leave accounting. The administrative supervisor would not plan and assign work, set objectives and

priorities, provide technical assistance, nor review the work products. Thus, a position does not share accountability for the work products with an administrative supervisor. *Contrast with "nonprofessional supervisor" and "professional supervisor."*

Administrative transfer: The appointment of an employee to a different position assigned to a class having the same or counterpart pay rate or pay range as the class to which the employee's current position is assigned. An "administrative transfer" is a permissive transaction. *See s. ER-MRS1.02(33), Wis. Adm. Code; Contrast with "contractual transfer," "mandatory transfer," and "union transfer"; related to "counterpart pay ranges" and "transfer."*

Administrator: "The principal subunit of the department is the 'division'. Each division shall be headed by an 'administrator'." *See s. 15.02(3)(c)(1), Wis. Stats.; same as "division administrator."* **ALSO:** The administrator of the Division of Personnel Management. *See s. 230.03(1), Wis. Stats.*

Advanced level: The level within a classification series in which the work is beyond the objective level and which typically requires competition. Advanced level is a concept that appears in some classification specifications. Not all positions are expected to attain the advanced level. The classification specification will define the requirements for the advanced level in terms of duties and responsibilities and will discuss whether positions can be reclassified to that level or whether competition is required. *Contrast with "developmental level, "entry level," and "objective level;" related to "full performance level."*

Adverse impact: The result of a facially neutral (i.e., not obviously discriminatory) human resources management practice and/or policy that affects a protected group differently than the other employees (i.e., to the disadvantage of the protected group). Also referred to as "disparate impact". **In assessment development**: An assessment has adverse impact on a protected group (women or minorities) if the passing rate of the protected group is less than 80 percent of the passing rate for the non-protected group. *Related to "Affirmative Action," "Age Discrimination in Employment Act of 1967,""Americans with Disabilities Act of 1990," "Civil Rights Act," "discrimination," "disparate treatment," and "Equal Employment Opportunity Commission."*

Affirmative action: Specific employment actions which are designed and taken for the purposes of all of the following: (a) ensuring equal opportunities; (b) eliminating a substantial disparity between the proportion of members of racial and ethnic, gender, or handicap groups either in the classified civil service determined by grouping classifications according to similar responsibilities, pay range, nature of work, other factors recognized in the job evaluation process and any other factors the department considers relevant, or in similar functional groups in the unclassified service, and the proportion of members of racial and ethnic, gender or handicap

groups in the relevant labor pool; (c) eliminating present effects of past discrimination. *See s. ER 1.02(2), Wis. Adm. Code, s. 230.03(2), Wis. Stats. Related to "adverse impact," "Age Discrimination in Employment Act of 1967," "Americans with Disabilities Act of 1990," "Civil Rights Act," "discrimination," "disparate treatment," and "Equal Employment Opportunity Commission."*

Affirmative action groups: "Means one or more of the following: a) racial or ethnic groups, b) gender groups, and c) handicapped groups." *See ss. 230.03(2) and 230.213, Wis. Stats.; ER 43.02(2), Wis. Adm. Code.*

Affirmative action program: "Specific results oriented standards, procedures, and initiatives designed to ensure equal employment opportunity and to eliminate present effects of past discrimination." *See s. 230.03(2) and 230.213, Wis. Stats.; ER 43.02(2m), Wis. Adm. Code.*

Age Discrimination in Employment Act of 1967 (ADEA): Federal legislation that made employees between the ages of 40 and 65 a protected class. The 1978 amendments to this Act raised the minimum age limit for mandatory retirement to 70 for most employees. Amendments in 1986 effectively ended mandatory retirement based solely on age and expanded benefit entitlement (in the Older Workers Protection Act) by restoring the "equal benefit or equal cost" requirement for age-based differences in employee benefit plans. *Related to "adverse impact," "Americans with Disability Act of 1990," "Civil Rights Act," "discrimination," "disparate treatment," and "Equal Employment Opportunity Commission."*

Agency: Any state board, commission, committee, council, or department in the state or unit thereof created by the constitution or statutes, if such board, commission, committee, council, department, unit, or the head thereof is authorized to appoint subordinate staff by the constitution or statute, except a legislative or judicial board, commission, committee, council, department, or unit thereof, or an authority created under chapters 231, 232, 233, 234 or 235, Wis. Stats.. "Agency" does not mean any local unit of government or body within one or more local units of government which is created by law or by action of one or more local units of government.

Agency head determination: A formal review of a position's responsibilities by the head of an agency, or his/her designee, for the purpose of determining whether a position should be designated a protective occupation for purposes of the Wisconsin Retirement System and, if the position is filled, whether the incumbent should be certified to the Public Employee Trust Fund as a protective occupation participant. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Agriculture: Includes the cultivation and tillage of soil; dairying; production, cultivation, growing and harvesting of agricultural or horticultural commodities; raising livestock, bees, fur-bearing animals, or poultry, and any practices (including

forestry or lumbering operations) performed by a farmer or on a farm in conjunction with the farming operations, including preparation for market, delivery to storage or to market or to carriers for transportation to market. Employees not employed in farming, such as a bookkeeper, or by a farmer or on a farm are not employed in agriculture.

Alien: Any person not a citizen or national of the United States.

All funds cost: The estimated dollar cost of the economic component of a collective bargaining agreement or compensation plan provision regardless of the funding source, e.g., General Purpose Revenue, program revenue, federal funds, program revenue segregated, etc. *Related to "all funds with fringe cost," "contract cost," "costing," "fiscal estimate," and "variable fringe rate."*

All funds with fringe cost: The all funds cost increased by the fringe rate costs (a percentage established by the Department of Administration). *Related to "all funds cost," "contract cost," "costing," "fiscal estimate," and "variable fringe rate."*

Allocation: "The initial assignment of a position to the appropriate class by the administrator as provided in *s. 230.09(2), Wis. Stats.*" *See s. ER 3.01, Wis. Adm. Code; contrast with "reclassification," "reallocation," and "regrade."*

Allocation pattern: A description of the different types of activities usually found or used within a single classification or classification series. Allocation patterns identify how different job types are classified within a class or how they are classified at different levels within a classification series. There may be only one allocation pattern to several different types of activities which could be performed and classified the same. Representative positions within a classification specification can be considered an allocation pattern and may provide further examples of the different allocation patterns used in a classification. At the time the classification specification is written, the allocation patterns have been determined to be equivalent and similar in nature of work. However, it is possible that not all allocation patterns will be identified in the classification specification. Allocation patterns may be established by the Agency Human Resources Office without being formally identified in the classification specification and should be formally documented within that agency. *Related to "best fit," "class or classification," "classification method of job evaluation," "classification/class title," "classification specification," "definition statements," "job grade," "majority of time," "position," and "representative position."*

Alphabetical Listing of Classifications: The listing of official classification titles that is located on the DPM website--http://doa.wi.gov/divisions/personnel-management.

Alternative work schedule: Work schedules which differ from the standard work schedule, including but not limited to: part-time, shared time, and flexible-time schedules." *See s. 230.215, Wis. Stats; Ch. ER 42, Wis. Adm. Code; related to*

"flextime," and "job sharing;" contrast with "nonstandard work period" and "standard work week."

Americans with Disabilities Act of 1990 (ADA): This law creates nondiscrimination protections for people with disabilities, similar to the Title VII of the Civil Rights Act of 1964. Under the law, employers may not refuse to hire or promote a person because of a disability, and employers are required to make "reasonable accommodations" to allow people with disabilities to perform essential functions. The law includes those with hearing and visual impairments, physical, and mental impairments, AIDS victims, alcoholics and past drug users in its definition of "disabled." It does not include current illegal drug users, homosexuals, transsexuals, transvestites and people with emotional disorders. The Equal Employment Opportunity Commission enforces regulations. *Related to "adverse impact," "Age Discrimination in Employment Act of 1967," "Civil Rights Act," "disability," "discrimination," "disparate treatment," Equal Employment Opportunity Commission" and "Vocational Rehabilitation Act of 1973."*

Anniversary date: (1) The day on which an employee attains an additional year of continuous service. (2) The date used in some pay systems to trigger a review of the employee's salary and/or to trigger a potential salary increase.

Annualized lump sum payment: An amount paid in lieu of a base pay adjustment, typically based on the number of projected work hours for an employee from the date of the corresponding base pay adjustment, to the end of the fiscal year. *Same as "fiscal year lump sum payment."*

Annuitant: A person receiving a retirement annuity, beneficiary annuity or a disability annuity from the Wisconsin Retirement System, including a person whose disability annuity has been suspended., s. 40.02(4), Wis. Stats.

Appeal: Exercising rights to challenge a decision or action to a higher court or administrative authority.

Appellant: An employee(s) or job applicants who file a timely appeal with the Personnel Commission for an appealable personnel transaction affecting their position. *See ss. 230.04(1m), 230.44, and 230.45, Wis. Stats.*

Applicant Flow: Identification of numbers of people (by ethnic group, gender, disabled and unknowns) who have applied, taken an assessment, and passed an assessment. This information is used to identify if the assessment had adverse impact.

Application Materials Review (AMR): A historical assessment tool providing an evaluation of training and experience in a less structured or detailed format than that of the AHQ. Applicants submit specific information as directed in the job announcement (usually cover letter, resumé and two- to three-page paper describing qualifications) that are evaluated based on structured rating criteria.

Appointing authority: The chief administrative officer of an agency unless another person is authorized to appoint subordinate staff in the agency by the constitution or statutes. *See ss. 230.03(4) and 230.06, Wis. Stats.*

Appointment: " . . . [T]he action of an appointing authority to place a person in a position within the agency in accordance with the law and chs. ER 1 to 47 and ER-MRS 1 to 34, Wis. Adm. Code, effective when the employee reports for work or is in paid leave status on the agreed starting date and time. 'Appointment' does not include an acting assignment under ch. ER-MRS 32." s. ER-MRS 1.02(2), Wis. Adm. Code.

Appointment maximum: "The maximum base rate an employee may be granted when appointed to a position assigned to that 'appointment maximum,' except as otherwise provided under Pay On Appointment or Pay on Reinstatement or Restoration. The 'appointment maximum' does not apply to any original appointment for which the Entry Professional Program (EPP) was used in recruitment. The appointment maximum is not the maximum of the pay range." *See Comp. Plan, Sec. I 3.00(1); related to "band," "broadbanding," "knowledge-based pay," "pay band," and "temporary appointment maximum."*

Approval Process: Some of the steps in the recruitment and selection process require formal on-line approval, e.g., Job Announcement, Creating a New User, etc. Each approval request requires an HR User to view the information regarding the request. There are three ways to view an approval request; yet, one option only allows for a user to view the information regarding the transaction involved and nothing else: (1) **My Pending Approvals** allows a user to view what transactions are awaiting their approval. (2) **My Approval Inbox** allows a user to not only view which transactions are awaiting their approval, but can also process (approve/deny) the request by clicking on the title involved. (3) **All Pending Approvals** allows a user to view all the current approval requests that are awaiting approval.

Arbitrary: (1) Used in the context of a regrade for an employee for a reclassification or reallocation transaction. If an employee is pre-selected for additional duties with out holding competition, the employee may not be regraded. The pre-selection is considered arbitrary and capricious. (2) an abuse of authority. *See WHRH Ch. 370; related to "abuse of authority" and "capricious."*

Arbitration: A method of settling labor-management contractual disputes by having an impartial third party hold a formal hearing, take testimony and render a decision. The decision is binding upon the parties. *Related to "award" and "impasse;" similar to "conciliation," " fact finding" and "mediation."*

Area(s) of Competition (AOC): The group of people eligible to apply for a position. There are two primary areas of competition to consider: open and promotional (obsolete) competition. Open competition is open to all qualified applicants. Promotional competition is open to qualified applicants in the classified

civil service who occupy a regular, seasonal or sessional position in which permanent status may be obtained; who are on an approved *leave of absence*; who are former employees with restoration rights resulting from layoff; or who have previously gained permanent status and are temporarily serving in a project position. Promotional competition may be open to all eligible employees within the classified civil service (servicewide), or, if certain conditions are met, to eligible employees within the University of Wisconsin System (systemwide), an agency (agency), or recognized *employing unit* (unit). Promotional competition was eliminated as an AOC option with 2015 Wisconsin Act 150.

Area wage survey: An area wage survey is any survey completed for a geographical area and includes the organizations competing for labor. An example of an area wage survey is conducted by the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor in Standard Metropolitan Statistical Areas (SMSAs) Another example is the Labor Market Area Wage Survey conducted by the Department of Work Force Development. *Related to "survey."*

Arithmetic average or mean: The most common measure of central tendency, computed by totaling or summing scores and dividing by the number of scores; yields a measure of the difficulty level of the test or assessment device and the overall quality of the candidate group.

Arrest Record: "Includes, but is not limited to, information indicating that an individual has been questioned, apprehended, taken into custody or detention, held for investigation, arrested, charged with, indicted or tried for any felony, misdemeanor or other offense pursuant to any law enforcement or military authority. *s. 111.32(1), Wis. Stats.*

Assessment Center: A collection of instruments and exercises designed to diagnose a person's development needs.

Assigned headquarters: The facility or location to which an employee is normally assigned by the employer as a headquarters. *Same as "headquarters city;" related to "work site."*

Assistant Administrator: A position serving in a line capacity responsible for administering a significant portion of the program area within an organizational unit. The "assistant" shares responsibility and accountability with the program head for only that portion of the program directly supervised. Since a program may have one or more "significant portions," there may be one or more Assistants. Depending on the size, complexity, and diversity of the program, there may also be a Deputy position. *Contrast with "deputy."*

Assistant District Attorneys - ADA: The bargaining unit name for Assistant District Attorneys under Bargaining Unit designation 20.

Asylee: An alien in the United States or at a port of entry who is found to be unable or unwilling to return to his or her country of nationality, or to seek the protection of that country because of persecution or a well-founded fear of persecution. Persecution or the fear thereof must be based on the alien's race, religion, nationality, membership in a particular social group, or political opinion. For persons with no nationality, the country of nationality is considered to be the country in which the alien last habitually resided. Asylees are eligible to adjust to lawful permanent resident status after one year of continuous presence in the United States.

At Risk: Employees were placed at risk in the following situations: Employees whose positions had been scheduled for deletion or reduction in budgeted time percentage. Employees whose position may be affected by reassignment or displacement as a result of layoff. Employees returning from leave of absence who need to be returned to a classification in the layoff group if no suitable vacancy exists. Employees whose positions have been identified for relocation to another geographic location. For changes to the geographical area, the newly assigned headquarters must be 40 miles or greater from the employee's home except in cases where the new work site is at a shorter distance than the current work site is from his/her home. Employees in filled positions whose duties and responsibilities were changed significantly enough to re-fill the position on a *promotion* or *demotion* basis. Employees in filled positions whose duties and responsibilities were changed enough to require significantly different skills, and the position will be re-filled on a transfer basis. (The practice of designating employees as At-Risk stopped in July 2016.)

At-risk employees had the right to use "at-risk" services, including the Wisconsin Employee Referral Service (WISCERS).

Attrition: The reduction in the size of a work force through normal processes, such as voluntary resignations, retirements, discharges for cause, transfers, and deaths. *Related to "layoff," "bumping" and "downsizing."*

Audit: A review of a position for the purpose of determining the appropriate classification ("best fit") and transaction. An audit can be a desk audit with a comparison of the position description to classification specifications and may include comparisons to other positions. An audit can be face-to-face with the incumbent and/or the supervisor of the position. For reclassification or reallocation requests, the audit includes a determination of the appropriate transaction and if the incumbent should be regraded. *See WHRH Ch. 332; related to "logical" and "gradual;" similar to "job analysis interview."*

Automatic wage adjustment: Automatically increasing or decreasing wages in accordance with a specific plan formula.

Automatic pay progression: Automatically increasing wages after specified periods of service, until the employee reaches the top of his or her salary range. Automatic pay progression often is achieved through an automatic step-rate pay system.

Award: The final decision of an arbitrator. *Related to "Arbitration."*

Back-end loading: A base-building adjustment that has an effective date later in a fiscal year or contract period. *Related to "general wage adjustment."*

Background Information: Obtain information concerning a job candidate's work history before extending an offer to hire. This information is normally inclusive of an individual's past work performance with their previous employer(s). Yet, dependent on the position at hand or the hiring agency; the information inquired may need to include a criminal conviction check, official transcripts for positions requiring higher degrees, etc.

Band: A broad pay range consisting of a minimum, maximum, and appointment maximum. Pay bands are designed to provide pay-setting flexibility and to improve recruitment and retention of critical employees. *Similar to "broadband" and "pay band;" related to "appointment maximum" and "temporary appointment maximum."*

Band Starting Point: Identifies the raw score point where the system will start assigning bands. The default starting point is set at the minimum (per the scoring criteria) for that part. For example, if the band width is 5 points and the starting point is 48, applicants with a score of 48-52.999 will be in the lowest band; applicants with a score of 53-57.999 will be in the next band, etc.

Band Width: If the assessment is to be banded, this field is used to determine raw score range that will identify a band (e.g., if the band width is 5 points, all applicants falling within a 5-point range will be assigned to the same band). The band width can be defined using confidence intervals by selecting the applicable radio buttons.

Banding: A scoring methodology used in the Entry Professional Program to statistically determine groups of candidates for whose scores are close enough be considered equal for certification purposes (places candidates in categories).

Bargaining Agent: An organization which is the exclusive representative of all employees in a bargaining unit.

Bargaining Unit: A group of employees that a state administrative agency has certified as appropriate to be represented by a union for the purpose of collective bargaining. (In Wisconsin, that agency is the Wisconsin Employment Relations Commission [WERC]). *See Ch. 111, Wis. Stats.; see bargaining units of "ASP,"*

"MGAA," "SEA," "SPDA," "TAA," "UPQHC," "WEAC", "WPDA," "WPEC," "WSAA," "WSBTC," "WSEU" and "WSP."

Base pay/Basic pay: The pay rate excluding any overtime or supplementary compensation.

Base pay rate: The official hourly pay rate excluding any overtime or supplemental pay. Base pay rate is limited to the pay range maximum; base pay rate plus any supplemental pay received is not limited to the pay range maximum. Base pay is also the rate at which accumulated sick leave credits are converted to offset health insurance upon retirement, and/or to pay out earned but unused annual leave credits upon retirement or departure from state service. S*ee s. ER 1.02(5), Wis. Adm. Code; similar to "across the board increase," "general wage adjustment," "pay adjustment," "regular rate," and "wage rate."*

Basic Certification: Minimum of five names or 10 percent of the total register up to a maximum of ten names. (Often referred to as Traditional Certification.)

Benchmark response: A response to an interview question which is developed by the interviewers, in cooperation with human resources staff, in advance of the interview. A benchmark response enables the interviewers to systematically (either qualitatively or quantitatively) evaluate each candidate's response. A benchmark response is also known as a "good answer."

Benchmarks: A scoring guide for a narrative assessment question which is developed by the subject matter experts, in cooperation with human resources staff. A benchmark serves as a grading standard and enables the raters to systematically (either qualitatively or quantitatively) evaluate each applicant's response to assessment questions. The benchmark is set by job experts and typically incorporates the minimum acceptable response or grading standard, as well as anchors at the high and low end of the scale. This structured rating criteria is used by a rating panel and typically utilizes a 0-9-point scale for oral, essay, Achievement History Questionnaires and simulation assessments. Smaller scales are typically used in Application Material Reviews and Resume Screens.

Benchmark job: A job that is commonly found and defined, used to make pay comparisons either within the agency or to comparable jobs outside the agency. *Similar to "job cluster" and "job worth hierarchy."*

Bereavement leave: Authorized leave for travel to and attendance at the funeral of immediate family members. The collective bargaining agreement or Compensation Plan governs use of benefit time off. *Same as "funeral leave."*

Best able: Those candidates, or potential candidates, who meet at least the minimum qualifications of the position based on relevant knowledge, skills, or abilities (KSAs) in addition to those factors listed in s. ER-MRS 6.01, Wis. Adm. Code.

Best fit: Positions are classified based on the majority of duties performed (more than 50 percent) and must be classified in the classification whose specification most specifically describes the duties and responsibilities assigned to and performed by the positions when compared to the definition of the specification or through other methods of position analysis. *See WHRH Ch. 370; related to "allocation pattern," "classification method of job evaluation," "Knowledge Skills and Abilities," and "majority of time."*

Biennium: A two year period coinciding with a legislative session, beginning on July 1 of an odd-numbered year and extending through June 30 of the next odd-numbered year. The state budget is developed and appropriated on a biennial basis coinciding with this period.

Biodata: Biographical data requested from applicants that provide a specific account of their work history.

Blue Flu: A method used by police officers in which police officers call in sick en masse instead of a strike. The same tactic is used by other employees such as firemen (red flu) and nurses (white flu). *Similar to "boycott," "collective bargaining," "concerted activity," "job action," "picketing," "red flu," "sit-down strike," "slowdown," "strike," "sympathy strike," and "white flu."*

Bona Fide Occupational Qualification (BFOQ): Typically refers to a valid job requirement such as a knowledge, skill or ability level that is required for competent job performance. (The origin of the term BFOQ is found in Title VII of the Civil Rights Act [1964] which prohibits employment discrimination on the basis of race, sex, religion or national origin. Under certain conditions, however, a requirement for a specific gender or religious affiliation is allowed if the requirement is a BFOQ for a given job, such as the requirement of Catholic affiliation for the job of Catholic priest.) *Related to "job description," "job specifications," "Knowledge, Skills, and Abilities," and "position description."*

Boycott: An effort by unions to refuse to deal with employers in an attempt to win concessions. A primary boycott is the refusal to patronize an employer who is directly involved in a labor dispute. *Similar to "blue flu," "collective bargaining," "concerted activity," "job action," "picketing," "red flu," "sit-down strike," "slowdown," "strike," "sympathy strike," and "white flu."*

Breadth: One of the traditional measures of scope which focuses on variety (the number and type of goals and worker activities, especially those which require different sets of knowledge, skills, and abilities). *Related to "accountability," "complexity," "depth," "discretion," "impact of work," "Knowledge Skills and Abilities," "point factor system," "scope," and "survey."*

Broadbanding: A pay structure that consolidates a number of pay grades and salary ranges into fewer broad bands with relatively wide salary ranges, typically with 100 percent differences between minimum and maximum. *Similar to "band," and "pay band," related to "appointment maximum" and "temporary appointment maximum."*

Bumping: A historical practice used during a layoff or reduction in the work force that allowed a senior employee to displace a junior employee. *See "displacement" and "layoff;" related to "attrition" and "downsizing."*

Bureau director: "The principal subunit of the division is the 'bureau.' Each bureau shall be headed by a 'director.' " *See s. 15.02(3)(c)(2), Wis. Stats; same as "director."*

Bureau of Compensation and Employment Relations (BCER): The Bureau of Compensation and Employment Relations is responsible for the administration of the State of Wisconsin Compensation Plan, Classification Plan, and enterprise employment relations functions. The bureau develops and administers pay and benefits systems, maintains a labor market survey research program and develops the compensation reserve recommendation for the governor's biennial operating budget and ensures state agency compliance with the Family Medical Leave Act. The bureau also negotiates and administers any active collective bargaining agreements.

Bureau of Equity and Inclusion (BEI): Formerly known as the Bureau of Affirmative Action. The Bureau of Equity and Inclusion is a policy development and compliance unit and serves as the central equal employment opportunity/affirmative action (EEO/AA) office for Wisconsin state government. The mission of the bureau is to advise and assist the DPM Administrator, the Director of the Bureau of Merit Recruitment and Selection, and agency heads in the development and monitoring of policies and programs that are designed to ensure appropriate affirmative action in state employment, increase the recruitment and employment of ethnic minorities, women, veterans and people with disabilities in agencies, and promote an inclusive work environment for all employees. BEI issues standards, reviews and approves state agency affirmative action and veterans employment plans, and monitors agency compliance on an on-going basis.

Bureau of Merit Recruitment & Selection (BMRS): The Bureau of Merit Recruitment and Selection (BMRS) administers the Wisconsin civil service system by recruiting,hiring, testing, and evaluating applicants; creating employment registers of qualified applicants; and referring best-qualified candidates to agencies for interviews.

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Calculated Column: Column identifies the scoring criteria calculated by the system. This column is first populated by using the "calculate" button, which creates passing points and other scoring criteria based on the criteria entered at the lower level(s) in the planned column. Statistical values may also be populated when the assessment is scored.

Canceling a Register or Certification: Per ER-MRS 6.095, Wis. Adm. Code, a register or certification may be cancelled (killed) due to a compromise of the merit system (e.g. register was not established according to the rules, someone gained knowledge of the assessment).

Cap: Opposite of "floor." The highest number of points (equal to or less than the "maximum") that will be awarded to an applicant for that item or part. Example: Cap = 6. On an OIQ, the question may ask candidates to identify the total number of credits they have in a particular area. The response sheet may have space for up to ten credits, but you may not want to award more than 6 total points for the question.

Capricious: (1) Used in the context of a regrade for an employee for a reclassification or reallocation transaction. If an employee is pre-selected for additional duties without holding competition, the employee may not be regraded. The pre-selection is considered arbitrary and capricious. (2) An abuse of authority. *See WHRH Ch. 332.040(F)(2), Related to "arbitrary" and "abuse of authority."*

Caregiver: "A person who is, or expected to be, an employee or contractor of an entity, who is or is expected to be under the control of an entity, as defined by the department by rule, and who has, or is expected to have, regular, direct contact with clients of the entity." Wisconsin's Caregiver Law, Chapters 48 and 50, Wis. Stats.

Career Executives: Highly qualified executive candidates who have demonstrated knowledge and skills acquired through work experience and training, which, in the judgment of the director, will provide reasonable prospects for success in career executive positions. (See s. ER-MRS 30.03(1), Wis. Adm. Code.)

Career executive candidate: A person who is on a register for a career executive position. Candidates may be classified civil service employees or persons from outside of the classified civil service.

Career executive classification: A classification formally designated by the DPM Administrator to be included in the "career executive program." *See s. 230.24, Wis. Stats.; Ch. ER 30 and Ch. ER-MRS 30, Wis. Adm. Code; related to "senior manager pay system."*

Career executive incumbent employee: A person who occupies a career executive position and is included in the career executive program. Also referred to as "incumbent career executive."

Career executive position: A position formally designated by the Administrator of DPM to be included in the "career executive program." DPM maintains a list of all of these positions and of all employees occupying such positions who are in the career executive program either through appointment or by opting into the program. A position in the "career executive program" is primarily "administrative in nature." Positions in the "career executive program" are entitled to greater annual leave provisions than are provided for other classified positions. *See s. 230.24, Wis. Stats; Ch. ER 30 and Ch. ER-MRS 30, Wis. Adm. Code; related to "senior manager pay system."*

Career executive program: A program developed by the Division of Personnel Management, by rule, that emphasizes excellence in administrative skills in order to: (1) provide agencies with a pool of highly qualified executive candidates; (2) provide outstanding administrative employees a broad opportunity for career advancement; and (3) provide for the mobility of such employees among the agencies and units of state government for the most advantageous use of their managerial and administrative skills. *See s. 230.24, Wis. Stats.; Ch. ER 30 and Ch. ER-MRS 30, Wis. Adm. Code; related to "senior manager pay system."*

Career executive reassignment: The permanent appointment by the appointing authority of a career executive within the agency to a different career executive position at the same or lower classification level for which the employee is qualified to perform the work after being given the customary orientation provided to newly hired workers in such positions. *See s. ER-MRS 30.07, Wis. Adm. Code*.

Career executive transfer: The permissive appointment of a career executive incumbent to a different career executive position assigned to a class having the same or counterpart pay rate or pay range as a class to which the employee's current position is assigned. *See ss. ER-MRS 30.08 and ER-MRS 1.02(33), Wis. Adm. Code*.

Career ladder: A non-technical term used to refer to a formal or informal pattern of typical or logical career movements for an employee. Career ladders often involve movement between bargaining units, e.g., movement into a professional position from a technical position in a related field, or into nonrepresented positions, e.g., supervisory or management positions. The means of movement would be transfer or promotion rather than reclassification. A formalized career ladder may exist in areas with multiple classification levels, a classification series consisting of entry, developmental, journey, and senior levels. *Related to "classification series" and "progression."*

Catastrophic leave: A program that allows employees to donate specified types and amounts of leave to employees who have been granted unpaid leaves of absence for catastrophic need. While some employees who are eligible to receive contributions of paid leave under this program may be on authorized state or federal family or medical leave, the determination of catastrophic leave is entirely separate from those

laws and should not be confused with them. *See s. ER 18.15, Wis. Adm. Code; and WHRH Ch. 660.*

Catastrophic need: An illness or injury that incapacitates or is expected to incapacitate an employee or an employee's family member that requires the employee to take time off from work for an extended period of time and that creates a financial hardship for the employee (unless defined differently under the applicable collective bargaining agreement). *See s. 230.35(2r), Wis. Stats., and s. ER 18.15(1)(a), Wis. Adm. Code.*

Cease and desist order: An order issued by a court or administrative agency ordering that a particular activity be stopped.

Census Identifier Code (CIC): Used to extract race and gender information for Affirmative Action purposes.

Centralization: The extent to which policy determination and administration practices are controlled, usually by a central work group, across organizational units. The degree of centralization or decentralization depends on the style, culture and compensation strategy of an organization's management.

Certification: (1) Authorization by the Director of the Division of Merit Recruitment and Selection (or the agency head, if delegated), that the names of applicants on a register are qualified to compete for a civil service job. (See also "expanded certification.") (2) The process used to determine the number and names of qualified candidates from the employment register to the next step of the selection process according to the certification rules established for the type of position or for a specific position vacancy.

Certification request: The electronic or paper form that identifies a vacant position and is updated with hire information upon a person's appointment to the position (Form DOA-15313).

Certification rule: Number of names which the appointing authority wants certified from the appropriate register.

Certification Rule—EPP: Under the Entry Professional Program, the supervisor of the vacancy identifies the number of candidates he/she would like to be referred to the interview.

Certified Registrants: All registrants who meet the certification parameters (e.g. interested in employment in the geographical area of the vacancy; possess special qualification required by the position.)

C.F.R.: Code of Federal Regulations.

Charge: A document filed by an employee, an employer, a union, or an individual alleging that an unfair labor practice has been committed. *Related to "unfair labor practice."*

Charter: Person who keeps the record on the flip chart. From Wisconsin Employment Relations Commission consensus training.

Check-off: A union security provision that allows union dues to be deducted by the employer from the pay of union members. The employer then delivers the dues to the union on a scheduled basis.

Chief: The individual responsible for all activities in a section which is the first subdivision of a Bureau. *Same as "section chief."*

Child: A biological, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing *in loco parentis,* who is either under age 18, or age 18 or older and incapable of self-care because of a mental or physical disability or serious health condition. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Christian Science practioner: Christian Science practitioners listed with the First Church of Christ, Scientist in Boston, Massachusetts; a Christian Science practitioner residing in this State who is listed as a practitioner in the Christian Science journal. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Civil service: All offices and positions of trust or employment in the service of the State, except offices and positions in the organized militia.

Civil service score: A score which is converted from the raw score to a civil service scale, with a passing point of 70 and a maximum of 100.

Civil Rights Act: Title VII of the Civil Rights Act of 1964 prohibits discrimination in all aspects of employment when that discrimination is based on race, color, religion, national origin or sex. It is unlawful for employers to segregate or classify employees based on the above so that they are adversely impacted. The act was amended in 1991 to clarify prior legislation and authorize compensatory and punitive damages and jury trials in Title VII cases where plaintiffs allege and prove intentional illegal discrimination. *Related to "adverse impact," "Age Discrimination in Employment Act of 1967," "Americans with Disabilities Act of 1990," "discrimination," "disparate treatment," and "Equal Employment Opportunity Commission."*

Class or classification: A group of positions sufficiently alike in respect to their duties and responsibilities to justify common treatment in the various employment processes. *See s. 230.09, Wis. Stats.; similar to "allocation pattern" and "job grade."*

Classification code: A unique set of digits assigned to each classification used in personnel/payroll data processing to identify class title, *pay schedule* and pay range. *See Alphabetical Listing of Classifications.*

Classification method of job evaluation: A nonqualitative form of job content evaluation that compares jobs to predefined class specifications established for each classification and pay range. Positions are placed in whichever classification best describes them. *Related to "allocation pattern," "best fit," "classification specification," "job specification," and "majority of time."*

Classification plan: "The classification plan for all positions in the classified service is made up of classes described in class specifications and assigned to pay rates or ranges in accordance with the provisions of *s. 230.09(2)(b), Wis. Stats*. For the purpose of chs. ER 1 to 45, class and classification are synonymous." *See s. ER 2.01, Wis. Adm. Code.*

Classification series: A group of related classes where work assignments involve a common field of activity, but there exists a difference in the complexity of duties and levels of responsibilities. *Related to "Career Ladder."*

Classification/class title: "(1) The administrator shall ascertain and record the duties, responsibilities and authorities of, and establish grade levels and classifications for, all positions in the classified service. Each classification so established shall include all positions which are comparable with respect to authority, responsibility and nature of work required. Each classification shall be established to include as many positions as are reasonable and practicable. In addition, each class shall: (b) Be designated by the same official generic title. The official titles of classes so established shall be used in all reports and payrolls and in all estimates requesting the appropriation of money to pay employees. (c) Be so constituted that the same evaluated grade level within a pay schedule can be applied to all positions in the class under similar working conditions. (d) Where practical, be included in a series to provide probable lines of progression. *See s. 230.09(1)(b)(c)(d), Wis. Stats., s. ER 2.03(1), Wis. Adm. Code; Alphabetical Listing of Classifications; same as "job title," related to "allocation pattern."*

Classification/official class subtitle: A second explanatory title determined by the Administrator of DPM which is used to identify positions whose duties distinguish them from other positions in the same class in terms of the qualifications required for successful performance in the position. Personnel processes such as recruitment, hiring above the minimum, assessment, certification, or layoff, may be based on both the class title and official subtitle. *See s. ER 2.03(2), Wis. Adm. Code; similar to "subtitle."*

Classification series: A grouping of related class titles, usually designated by a multiple number of levels, such as denoted by 1, 2, 3, 4, etc., or entry,

developmental, journey, senior, etc. A classification series can be non-progression or progression or a combination of both. For example, Payroll and Benefits Specialist 1-5 is a non-progression classification series. Payroll and Benefits Specialist-Conf. and Payroll and Benefits Specialist -Adv-Conf. is a different, non-progression classification series. Also see **Progression series** below.

Classification specification: A written definition that serves as the basic authority for the assignment of positions to a classification. *See s. ER 2.04, Wis. Adm. Code; related to "allocation pattern," "definition statement," "exclusion statement," "inclusion statement," "job specification," and "representative position."*

Classified employee: An employee included in the classified service comprised of all positions not included in the unclassified service. *See ss. 230.08(3) and 230.09(2)(a), Wis. Stats.*

Classified service: The classified service comprises all positions not included in the unclassified service. *See ss. 230.08(2) and (3)(a), Wis. Stats.*

Closed shop: An arrangement whereby an employer is required to hire union members only. The closed shop is illegal under federal and state statutes.

Close supervision: Implies that the work is performed according to detailed instructions and that supervision is available on short notice. *Contrast with "general supervision" and "limited supervision."*

Coefficient alpha: A general reliability coefficient based on the variance of scores on individual items or test parts or raters.

Cognitive exam: A "knowledge" test or other test of mental ability, e.g., multiple-choice, true/false, and essay exams. The exam must be proctored and monitored for security reasons.

Collective bargaining: "The performance of the mutual obligation of the state as an employer by its officers and agents, and the representatives of its employees, to meet and confer at reasonable times, in good faith, with respect to the subjects of bargaining provided in s. 111.91(1), [Wis. Stats.] with respect to public safety employees, and to the subjects of bargaining provided in 111.91(3), [Wis. Stats.] with respect to general employees, with the intention of reaching an agreement, or to resolve questions arising under such an agreement. The duty to bargain, however, does not compel either party to agree to a proposal or require the making of a concession. Collective bargaining includes the reduction of any agreement reached to a written and signed document." *See s. 111.81(1), Wis. Stats; related to "blue flu," "boycott," "concerted activity," "escalator clause," "National Labor Relations Act of 1935," "picketing," "red flu," "sitdown strike," "slowdown," "strike," "sweetheart contract," "sympathy strike," "white flu," and "zipper clause."*

Collective bargaining agreements: Agreements between employee groups and employers detailing pay and work conditions including wages, working hours, vacation, and holiday entitlements, termination of service provisions, and sometimes benefit entitlements. *Related to "escalator clause," "sweetheart contract," and "zipper clause."*

Comparable position: A position which is at the same or counterpart level or pay range as the position under discussion.

Comparable worth: The doctrine that men and women who perform work of the same "inherent value" should receive similar levels of compensation. According to this doctrine, jobs have an inherent value that can be compared across jobs of quite different content. Those accepting this position maintain that women performing jobs of comparable worth to those performed by men should be paid the same as men, excepting allowable differences (for example, seniority). Note, see Equal Pay Act. *Similar to "equal pay for equal work."*

Compensable factor: Any factor used to provide a basis for judging job value to create a job worth hierarchy (job evaluation). The generic compensable factors established by the Equal Pay Act of 1963 are skill, effort, responsibility, and working conditions.

Compensable factor degree: In quantitative job evaluation plans, measurement scales or "yardsticks" that identify specific levels or amounts of a compensable factor. Usually, there are five to seven degrees for each factor.

Compensable factor weight: The percentage weight or "influence" a single compensable factor has in a quantitative job evaluation plan.

Compensation reserve: (1) General Purpose Revenue (GPR) funds allocated in the biennial Budget Bill to fund the following: certain wage adjustments, along with the associated fringe rate cost, provided through collective bargaining agreements, nonrepresented Compensation Plan, or the University of Wisconsin pay plan,and the projected additional cost of the State's contribution towards other fringe benefit costs, including pension contributions or group health insurance premiums. *Related to "general purpose revenue" and "parameter."*

Compensation strategy/philosophy/policy: The principles that guide the design, implementation and administration of a compensation program. The strategy ensures that a compensation program, consisting of both pay and benefits, supports the mission, goals and business objectives. It may also specify what programs will be used and how they will be administered. The philosophy ensures that a compensation program supports the culture. The policy ensures that a compensation program carries out the compensation strategy while supporting the compensation philosophy.

Compensatory Time Credits: Paid time off the job which is earned and accrued by an employee in lieu of immediate cash payment for employment in excess of the statutory hours for which overtime compensation is required by Section 7 of the FLSA.

Competency: A behavior, attribute, or skill which is a predictor of personal success.

Competition: Competition means opening a position to other candidates. If it is determined that a filled position should be opened to other candidates, the position may be filled through many different transaction types such as promotion, transfer, demotion, reinstatement, etc. Competition is not synonymous with competitive assessment, but can include the competitive assessment process or hiring an internal employee who is eligible to transfer, demote, or reinstate into the position. An incumbent, in a position that is determined to be new, does not have rights to the position. Rights can include contractual transfer rights and layoff rights. *Refer to WHRH Ch. 370, section 060 for more detailed information on competition and descriptions of situations requiring the processing of certification requests. Related to "demotion," "layoff," "promotion," "reinstatement," and "transfer," contrast with "reallocation" and "reclassification."*

Competitive assessment: Method of evaluating an applicant's ability to perform the duties of the job.

Competitive pay policy: The strategic decision about which labor markets to use as comparison groups, and how to set pay levels with respect to those groups. *Similar to "pay policy" and "pay policy line."*

Complexity: The difficulty inherent in performing the work often measured by both the variety of worker activities (number and related or unrelated) and the type (simple, singular, recurring, predictable, non-controversial, etc., *vs.* intensive, multifaceted, sporadic, unpredictable, controversial, etc.). Complexity is frequently influenced by or interacts with scope. *Related to "accountability," "breadth," "depth," "discretion," "impact of work," "Knowledge, Skills, and Ability," "point factor system," "scope," and "survey."*

Compression: Pay differentials considered inequitable. The term may apply to differences between (1) the pay of supervisors and subordinates, (2) the pay of experienced and newly hired personnel of the same classification, or (3) pay-range midpoints in successive job pay ranges or related jobs across pay structures. *Related to "internal equity" and "parity."*

Concerted activity: Actions taken by more than one employee that include, but are not limited to, collective bargaining, strikes, boycotts and picketing. *Related to "blue flu", "boycott," "collective bargaining," "job action," "picketing," "red flu," "sitdown strike," "slowdown," "strikes," "sympathy strike," and "white flu."*

Conciliation: Attempts by a neutral party to reconcile opposing viewpoints in a labor dispute in order to help the parties come to a voluntary settlement. *Similar to "arbitration," " fact finding," and "mediation;" related to "award" and "impasse."*

Confidence intervals: A confidence interval provides a range of values around that estimate to show how precise the estimate is. The confidence level associated with the interval, usually 90 percent, 95 percent, or 99 percent, is the percentage of times in repeated sampling that the intervals will contain the true value of the unknown parameter. Confidence intervals may be used in adjusting passing points or defining bands for a set of scores.

Confidential: Any state employee who is privy to confidential matters affecting the employer-employee relationship, as well as employees of the WERC. To be considered confidential and excluded from the bargaining unit, an employee must have any of the following: (1) access to, knowledge of, or participation in confidential matters related to labor relations; (2) use of and access to files pertaining to labor contract negotiations, employee grievances, disciplinary actions, or contract interpretation; or (3) duties and responsibilities related to the employment process in which the employee is privy to such information as possible organizational and staffing changes. *See s. 111.81(7)(a), Wis. Stats.; WHRH Ch. 324; contrast with "represented position," similar to "exclusion" and "nonrepresented."*

Considerable difficulty: Refers to duties which require independent judgment; many factors must be considered and weighed before a decision can be reached. Usually positions requiring the planning, development, or coordination of activities or programs or part thereof and the direction or coordination of employees fall into this category.

Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA): Requires employers of 20 or more employees to offer employees and their dependents certain health insurance continuation rights if the employee is terminated, laid off, or has his or her hours reduced so that he or she no longer meets the eligibility requirements for health insurance coverage. If any of these events occur, the employee or dependents can choose to continue health care coverage for 18 months at the employer's group premium rate plus 2 percent administration costs.

Constructive discharge: Actions of an employer, or employer's representative, which intentionally or unintentionally made an employe's job so unbearable or onerous that the employee reasonably believes he or she has only two options: (1) to accept a personally extremely adverse situation or (2) resign.

Consultant: A recognized expert in a particular field of endeavor who engages predominantly in providing advice and assistance to those who seek his or her services. A consultant develops, demonstrates, and recommends new methods, projects, and ideas rather than simply disseminating information or training.

Consumer Price Index (CPI): An indicator of the cost of living published by the Bureau of Labor Statistics, U.S. Department of Labor. It is an indicator of the changing purchasing power of the dollar. Specifically, it measures price changes of items in a fixed "market basket" of goods and services purchased by a hypothetical average family.

Continuing treatment by a health care provider: See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.

Continuous recruitment: Positions with multiple vacancies and continuous hiring. Job announcements have no deadline or "apply by" date.

Continuous service: All the time in continuous employment status, as defined in s. ER 18.01(3) and computed under s. ER 18.02(2), in the unclassified service or as a permanent employee in the classified service. Continuous service does not include time served in limited term employment and in those positions under s. 230.08 (2)(j) and (k), Wis. Stats., regarding youth camps and students, respectively. *Frequently confused with "adjusted continuous service" and "credible service." See s. ER 1.02(6), Wis. Adm. Code; WHRH Ch. 732; related to "adjusted continuous service date."*

Contract cost: The estimated total cost of economic adjustments (wages and benefits) over a biennium. The cost may be expressed as GPR costs or "all funds." The fiscal estimate is required by state law for any statutory proposals and tells how much a proposal is estimated to cost or save the state in dollar terms. As it relates to state employee collective bargaining agreements and to compensation plan recommendations, the fiscal estimate reports the fiscal effect of economic adjustments that are supplemented from the Compensation Reserve. *Same as "fiscal estimate," related to "all funds cost," "all funds with fringe cost," "costing," and "variable fringe rate."*

Contractual transfer: The lateral movement of an employee from one position to another in accordance with transfer provisions established in the applicable collective bargaining agreement. *Contrast with "administrative transfer;" same as "mandatory transfer" and "union transfer;" related to "transfer."*

Control point: The point within a salary range representing the desired pay for a fully qualified, satisfactory performer in a job or group of jobs at a given time (usually the midpoint of the salary range). *Related to "mid-point."*

Conviction Record: "Includes, but is not limited to, information indicating that an individual has been convicted of any felony, misdemeanor or other offense, has been adjudicated delinquent, has been less than honorably discharged, or has been placed on probation, fined, imprisoned, placed on extended supervision or paroled pursuant to any law enforcement or military authority." *s. 111.32(3), Wis. Stats.*

Correlation: A measure of the strength of relation between two raters or variables, most frequently obtained by computing a Pearson Product-Moment correlation or Pearson r.

Cost of living adjustment (COLA): An adjustment made in wages that corresponds with a change in the cost of living. Although some people consider the typically annual wage increases provided to state employees to be "cost of living" increases, they are not directly or perfectly related to the changes in the cost of living. *Related to "escalator clause."*

Cost of the first year in the second year: The projected cost to be incurred and charged against the compensation reserve during the second year of a biennium for economic adjustments effective during the first year of the biennium. *Same as "first year in second year cost."*

Costing: The process of estimating the immediate and biennial cost to the state of the wage and benefit adjustments to employees. *Related to "all funds cost," "all funds with fringe cost," "contract cost," "fiscal estimate," "variable fringe rate," "frozen payroll data," and "lift."*

Counterpart pay ranges: "Pay ranges or groupings of pay ranges in different pay schedules which are designated by the administrator to be at the same level for purposes of determining the appropriate personnel transactions." *See ER 1.02(7), Wis. Adm. Code; contrast with "higher pay range" and "lower pay range;" related to "administrative transfer."*

Covered employment: Employment that results in the accrual of leave credits pursuant to s. 230.35, Wis. Stats.

Creditable service: The creditable current and prior service, expressed in years, for which an employee participating in the Wisconsin Retirement System receives or is considered to receive earnings under the Wisconsin Retirement System. *Frequently confused with "continuous service" and "adjusted continuous service." See s 40.02(17), Wis. Stats.*

Criminal Background Check: Collection and review of an individual's pending charges or conviction record substantially related to the position. Under no circumstances will information related to an arrest be used in making an employment decision.

Criminal Charge: A criminal complaint, information, or indictment filed in a state, federal, tribal or international court of law.

Criteria: Measures which are established and by which other factors may be judged. *Related to "Factor Evaluation System," "factor comparison system" and "factor weight."*

Critical recruitment: "The director may designate classifications in which applicants are in critically short supply and may develop such recruitment, assessment and certification processes as will provide agencies with prompt certification when qualified applicants can be found, provided that due notice has been given and proper competitive standards have been maintained." *See s. 230.21(2), Wis. Stats.; s. ER-MRS 6.12, Wis. Adm. Code.*

Cuban/Haitian Entrant: Status accorded (1) Cubans who entered illegally or were paroled into the United States between April 15, 1980, and October 10, 1980, and (2) Haitians who entered illegally or were paroled into the country before January 1, 1981. Cubans and Haitians meeting these criteria who have continuously resided in the United States since before January 1, 1982, and who were known to the INS before that date, may adjust to permanent residence under a provision of the Immigration [Reform] and [Control] Act of 1986.

Current (Employment) Opportunities Bulletin (COB): An official publication of the State of Wisconsin, Office of State Employment Relations, accessible both in hard-copy form and electronically, which announces job openings in Wisconsin civil service and in some local governments. COBs typically list job opportunities for which both state and non-state employees may apply, and promotional and transfer opportunities for existing state employees. (Publication was discontinued in 2013.)

Customary Orientation and Training: Work unit policies and procedures. An individual is considered qualified to perform the work with "customary orientation and training" if the individual currently possesses the basic knowledge, training or experience to successfully perform the work immediately upon appointment after a short introduction to work unit policies and procedures. This orientation and training period is usually completed in less than six weeks.

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Data processing unit code (DP): A code designating the data processing unit to which a class belongs. A code whose primary purpose is to identify to which group a classification is affiliated for purposes of coverage under the state employment relations act. The DP unit code also is used to determine coverage under the Compensation Plan's overtime provisions. The DP Unit code indicates whether a classification is considered part of a potential or existing bargaining unit and whether it is considered professional or non-professional. *See s. 111.825(1), Wis. Stats.; and Alphabetical Listing of Classifications.*

Decertification: The withdrawal of a union's designation as exclusive representative of employees. This usually occurs after employees vote the union out.

Declined Offer (DO): A report of action on a certification; the individual was offered the position but he/she declined.

Default Scoring: This function allows the user to set up scoring criteria that will be applied to multiple parts and/or items within the assessment structure.

Definition statement: A broad and brief description of the duties of the class or series, the purpose in performing these duties, the work output, and the organizational location or work setting in which the class is found. This description should include the occupation or field within which the work takes place. *Related to "allocation pattern," "classification specification," "exclusion statement", "inclusion statement," and "job specification."*

Delegation: The DPM Administrator and the Bureau of Merit Recruitment and Selection (BMRS) Director may allocate "delegation" to agencies for the purpose of determining personnel transaction decisions. A formal agreement must be developed between DPM or BMRS and the agency, and signed by both agency heads or BMRS Director, for those classifications or circumstances the agency will be "delegated." Agencies must use existing rules and regulations for decision making, they may not develop different or new allocations or interpretations. DPM is ultimately responsible for delegated classifications and transactions and will monitor the delegated transactions. *See ss. 230.04 and 230.05(2)(a), Wis. Stats.; WHRH Chapters 248, 314, 334, 370 and 772; contrast with "nondelegated."*

Delegation for Staffing: BMRS has delegated authority for staffing activities to the agency. Delegation agreements include all classifications unless specifically excluded in the agreements. Multiple choice exams, HR management level positions, attorney and chaplain positions generally are not delegated. *See WHRH Chapter 248.*

Demotion: "The permanent appointment of an employee with permanent status in one classification to a position in a classification lower than the highest position currently held in which the employee has permanent status in class, unless excluded under *s. ER-MRS 17.02, Wis. Adm. Code*. A 'demotion' can be voluntary or involuntary." (See also "involuntary demotion" and "voluntary demotion.") *See ss. 230.28(1)(d) and 230.34, Wis. Stats; s. ER 1.02(8), Wis. Adm. Code; similar to "downgrade;" related to "layoff."*

Depth: One of the traditional measures of scope which focuses on intellectual understanding or competence necessary to perform the work (i.e., type and amount of specialized knowledge, skills, and abilities, which might range from superficial to comprehensive). *Related to "accountability," "breadth," "complexity," "discretion," "impact of work," "Knowledge, Skills, and Abilities," "point factor system," "scope," and "survey."*

Deputy: A position serving in a line capacity with authority to administer all of the program areas within an organizational unit and to which all other program employees are subordinate. The deputy "shares" responsibility and accountability for the program with the program head. By definition, there can be only one deputy per program (i.e., for each director of a program there can be only one deputy director for that same program). Depending on the size, complexity and diversity of the program, there may be one or more "assistant" directors. *Contrast with "assistant administrator."*

Description (item): A textual description of an assessment item.

Description (part): A textual description of the assessment part.

Detail Item Number: The number of the item in the assessment, i.e., where it falls within the sequence of items.

Detail Part Number: The number of the part in the assessment; i.e., where it falls within the sequence of parts.

Developmental level: An intermediate progression level between the entry and objective levels within in a classification series. At a developmental level, the employee is given progressively more complex assignments and/or receives decreasing levels of supervision compared to that at the entry level. This process enables the employee to develop the competence necessary to independently perform the full range of job duties at the objective level. *Contrast with "advanced level," "entry level" and "objective level."*

Diary/log: A method for gathering detailed information about a job by asking an employee to maintain a diary or log of his or her activities for a specified period of time.

Dictionary of Occupational Titles (DOT): A comprehensive body of standardized occupational information that groups jobs into "occupations" based on their similarities. The DOT defines the structure and content of all listed occupations utilizing uniform occupational language to compare and match the specifications of employer job openings and the qualifications of applicants who are seeking jobs.

Different Capacity: A different general occupational category than the regular employment. The duties and other factors contained in the definitions of the 3-digit categories of occupations in the Dictionary of Occupational Titles are used as a guide in determining whether the occasional or sporadic employment is in a "different general occupational category" than the regular employment.

Differential pay: A type of supplemental pay, typically paid when working certain days or certain time periods. *Similar to "add-on pay," "night differential," "on-call*

pay," "premium rate," "pyramiding," "responsibility pay," "shift differential," "supplemental pay" and "weekend differential."

Direct observation: A job analysis technique that involves the direct observation of employee(s) actually performing work in order to understand job content. The method is typically used for highly repetitive production jobs.

Directly Related to Management Policies or General Business Operations: Describes those administrative operations of significant importance to a business, as distinguished from production, including the work performed by employees engaged in, for example, advising the management, planning, negotiating, representing the organization, purchasing, promoting sales and business research and control.

Director: "The principal subunit of the division is the 'bureau'. Each bureau shall be headed by a 'director'." *See s. 15.02(3)(c)(2), Wis. Stats.; same as "bureau director."* **ALSO:** The director of the Bureau of Merit Recruitment and Selection. *See s. 230.03(9e), Wis. Stats.*

Disability: Under the Americans with Disabilities Act of 1990 (ADA), a physical or mental impairment that substantially limits one or more of the major life activities of an individual. A disability is said to exist when record is made of such an impairment or the employer regards the employee as having such an impairment. *Related to "Americans with Disabilities Act of 1990," and "Vocational Rehabilitation Act of 1973."*

Disabled: An individual who, under s. 111.32(8), Wis. Stats.,: (a) has a physical or mental impairment which makes achievement unusually difficult or limits the capacity to work, (b) has a record of such an impairment, or (c) is perceived as having such an impairment.

Disabled Eligibility (DEL): Waiver of an assessment for certain individuals with disabilities. In general, a determination is made that the assessment process, even with special accommodations, would not be an accurate assessment of the person's abilities. All DEL are certified. Must be approved by BMRS.

Disabled Expanded Certification (DEC): A special Affirmative Action program that allows for certification of additional registrants based on their inclusion in the Disabled Expanded Certification program, giving them an increased opportunity to be interviewed for jobs in state government. To be eligible for the program, a person shall have a permanent physical or mental impairment which substantially limits the major life activity of working.
This has a limit of three.

Disabled veteran: "A veteran who has a service-connected disability." *See s. 230.03(9m), Wis. Stats.*

Discharge: "An employee with permanent status in class or an employee who has served with the state as an assistant district attorney or an assistant state public defender for a continuous period of 12 months or more may be removed, suspended without pay, discharged, reduced in base pay or demoted only for just cause." *See s. 230.34(1)(a), Wis. Stats.*

Disclaimer statement: A provision in a job description that states that job descriptions typically do not specify every duty or responsibility that an employee may be asked to perform; such as "May perform other duties as required." *Related to "job description" and "position description."*

Discrete: A type of performance cycle in which the performance of the incumbent is limited to a defined performance period without any connection to past or future performance periods.

Discretion: Identifies the application of available regulations, guidelines, established policies, procedures and methods and the degree to which these standards must be incorporated into the activities being carried out by the position. The freedom or authority to make decisions and choices. *Related to "accountability," "breadth," "depth," "complexity," "impact of work," "Knowledge Skills and Abilities," "point factor system", "scope," and "survey."*

Discretion and Independent Judgment (i.e., Duty and Discretion Test): Involves the comparison and evaluation of possible courses of conduct and acting or making a decision after the various possibilities have been considered. The term implies that the person has the authority or power to make an independent choice, free from immediate direction or supervision and with respect to matters of significance. This should not be confused with the use of skill in applying techniques, procedures, or specific standards and does not apply decisions relating to matters of little consequence.

Discretionary Compensation Adjustment (DCA): The discretion the appointing authority has to provide economic recognition for significant and permanent changes in job duties, increased competencies, or to address pay equity or retention needs. (This is a historical term that is no longer used.)

Discretionary Compensation Performance Recognition Awards (DCPRA) and payments: Rewarding employees for meritorious performance with base pay increases (DCPRA) and/or lump sum payments (Discretionary Compensation Performance Recognition Payments) throughout the fiscal year. (This is a historical term that is no longer used.)

Discrimination: "Unlawful actions or practices which constitute unequal or different treatment of, or create an unequal or different effect on an individual or group of people, on the basis of age, race, creed or religion, color, handicap, sex, marital status, national origin or ancestry, political affiliation, arrest or conviction record,

sexual orientation, or other bases specified under *subch. II of ch. 111, Stats*. Disparate treatment of employees is based on factors not related to qualifications, skills, or performance." *See s. ER 1(9), Wis. Adm. Code; Related to "AA," "ADA," "ADEA," "adverse impact," "disparate treatment, "EEOC."*

Disparate impact: The result of an employer's action or policy which appears neutral and is not unlawful on its face, but affects more harshly one or more classes of employees.

Disparate treatment: Discrimination within the meaning of Title VII of the Civil Rights Act of 1964 can take many forms. It can occur when an employer or other person subject to the Act intentionally excludes individuals from an employment opportunity on the basis of race, color, religion, sex, or national origin. Evidence of exclusion need not be embodied in respondent's employment policies or practices however. Whenever similarly situated individuals of a different race, sex, religion, or national origin group are accorded disparate treatment in the context of a similar employment situation, it is reasonable to infer, absent other evidence, that discrimination has occurred. The presence of a discriminatory motive can be inferred from the fact that there were differences in treatment. *Related to "adverse impact," "Affirmative Action," "Age Discrimination in Employment Act of 1967," "Americans with Disabilities Act of 1990," "Civil Rights Act," "discrimination," and EEOC. See the Wisconsin Fair Employment Ac, which includes "sexual orientation" in its definition of "disparate treatment."*

Displacement: A process whereby an employee with permanent status in one classification and who is faced with no other alternatives to layoff (i.e., transfer or demotion to a vacant position) is allowed to replace an employee in a filled position in a lower level classification or a lateral, comparable position. Displacement is commonly referred to as "bumping." Displacement was removed as an alternative to layoff with 2015 Wisconsin Act 150.

Division administrator: The principal subunit of the department is the "division." Each division shall be headed by an "administrator.". *See ss. 15.01 and 15.02(3), Wis. Stats.; same as "administrator."*

Docking: Deducting from the pay of an employee an amount of money equal to a penalty imposed. Employees may be docked for violating rules regarding absenteeism, tardiness, and other employee actions. Docking pay for *nonexempt* employees must be done in accordance to the Fair Labor Standards Act regulations. *Related to "exempt," "Fair Labor Standards Act," "garnishment," "hours of work," "nonexempt," "overtime," and "salaried employee."*

Donor: Any person meeting the eligibility requirements under s. ER 18.15(3), Wis. Adm. Code, unless defined differently under the applicable collective bargaining agreement. To be an eligible donor, an employee will (a) be an eligible donor under a catastrophic leave program under a collective bargaining agreement under subch. V

of ch. 111, Wis.Stats., or (b) 1. Complete the first six months of service as a permanent classified, project or unclassified employee and 2. Have at least one year of continuous service. *See s. ER 18.15(1)(b), Wis. Adm. Code, WHRH Ch. 660, section 060.*

Downgrade: A systematic process of demotion, often caused by a reduction of operations, usually performed without prejudice on the part of the employees; or on a reclassification or reallocation downward. *Similar to "demotion."*

Downsizing: Reducing the size of the work force. *Related to "attrition," "bumping," and "layoff."*

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Earnings: As used in the context of collective bargaining, any wages or lump sum payments made to an employee that fall under the definition of "earnings" for the Wisconsin Retirement System (WRS). Depending on individual circumstances, WRS earnings are not necessarily the same as "income" for tax or benefit purposes. Designation of a lump sum amount as "earnings for purposes of benefits" may result in the recomputation of any benefits that are based on a rate of pay, e.g., retirement annuity, income continuation insurance, etc., for the period used to compute the lump sum payment. *See s. 40.02(22), Wis. Stats.; related to "lump sum."*

Economically disadvantaged individual: An individual whose circumstances are such that the individual meets specific criteria for participation in federal, state, or local governmental programs available to the unemployed, underemployed, or whose family income is at or below the poverty level as determined by federal or state standards.

Effective date: (1) The beginning of the pay period following the date on which an official request for reclassification is effectively received within an agency; (2) the date on which increases in wages go into effect; or (3) for contracts, the first pay day of the first pay period following the effective date of the contract.

Effective date of termination: The date of the employee's resignation as determined under Chapter ER 21, Wis. Adm. Code, or the date specified by the appointing authority for involuntary termination. In either case, the effective date of termination should be, but need not always be, the day the employee was last physically present for work or the last day of an employee's approved paid or unpaid leave of absence. Temporary layoff is treated as a leave of absence.

Effective receipt: "The date a recommendation is received by the office within the agency that has been delegated, in writing, effective receipt authority by the appointing authority." *See Comp. Plan, Sec. I 3.00(2) and WHRH Ch. 370.*

Eligibles: Those applicants for employment who have achieved a passing grade and are therefore eligible for further consideration at the next step of the hiring process.

Emergency Response Activity: Rescue work and ambulance services, and the dispatching of emergency vehicles and personnel.

Employee: Any person who receives remuneration for services rendered to the state under an employer-employee relationship. *See ss. 111.81(7) and 230.08(3), Wis. Stats.; ss. ER-MRS 1.02(6) and ER 1.02(10), Wis. Adm. Code; Comp. Pan, Sec. A 1.00(a); same as "incumbent" and "subordinate."*

Employee assistance programs (EAP): Programs that provide counseling or referral services to employees. Services vary by agency, but include assistance with referrals for chemical dependency and psychological, financial, legal, family, and career problems and protect employee confidentiality. Generally, participation is voluntary unless a mandatory management referral is made.

Employee benefits: A collection of non-cash compensation elements, including but not limited to income protection, health coverage, retirement savings, vacation, and income supplements for employees, provided in whole or in part by employer payments. *Related to "holidays," "inside payroll costs," "pay for time not worked," "sick leave," "statutory benefits," and "Travel Schedule Amounts;" similar to "fringe benefits" and "time off with pay."*

Employee contributions: Payments made by an employee to fund a specific benefit, thereby defraying part or all of the employer's cost.

Employee development and training plan: "The aggregate policies, procedures and activities that are designed and established to meet the training and development needs of employees." *See s. ER 44.02(2,) Wis. Adm. Code.*

Employee participation: Actual voluntary participation in an employee benefits plan.

Employee Retirement Income Security Act of 1974 (ERISA): A broad federal statute designed to provide uniform standards for employee benefit plans, particularly welfare and pension plans. In designing or administering any employee benefit program, it is critical to know whether the program is an "employee benefit plan" subject to regulation by ERISA.

Employing unit: "[A]n agency or a functional, organizational or geographic unit within the agency which has been approved under s. 230.30, Wis. Stats., for the

agency to use for any one or combination of the following: promotion, demotion, transfer, reinstatement, restoration, layoff and other related personnel transactions." s. ER-MRS 1.02(7), Wis. Adm. Code.

Employment-at-will: A common law rule that the employer is free to fire an employee for any reason—or for no reason at all, and that the employee has equal right of quitting at any time with or without cause, with or without notice. In the past, there have been exceptions to "at-will" terminations: (1) employees covered by the union agreement; (2) employees with individual employment contracts; (3) members of a "protected class" under anti-discrimination laws; (4) public sector employees, generally considered to have constitutionally protected "property" interest in their jobs and due process rights; (5) limitations on discharge if it is a violation of public policy; (6) limitations on discharge if breaching an implied contract; and (7) limitations on discharge if breaching an implied duty of good faith and fair dealing.

Employment Register: A list of candidates who are eligible for certification. For traditional recruitments, register contains civil service score and rank; for pass/fail assessments the civil service score will normally default to 70. *Also see "open competitive register", "promotional register," and "related employment register."*

Employment status: (Unless defined differently under an applicable collective bargaining agreement) The status of a person in the civil service under s. 230.08, Wis. Stats., while in pay status or on: (a) Approved leave of absence without pay; (b) military leave; (c) leave to serve in the unclassified service; (d) leave of absence due to injury or illness arising out of state employment and covered by worker's compensation under ch. 102, Wis. Stats., or s. 230.36, Wis. Stats.; (e) temporary layoff; or (f) layoff prior to July 1, 2016 and subsequent restoration from layoff under s. ER-MRS 22.10 within three years.

Entry level: The first level in a progression classification series. Entry level positions function under close supervision and perform the least complex duties assigned to that position type for a majority of the time. Employees at the entry level may perform only parts of a process, procedure, or project; perform the less complex processes, procedures, or projects assigned to that position type; and may function under the direction or mentoring of a more experienced employee in that occupational area. The level of performance in a position at which the employee applies and develops basic skills in procedures, techniques, tools, materials, and/or equipment appropriate to the area of specialization. Duties and tasks are standardized. Performs some advanced functions as part of training development. Resolves routine questions and problems, and refers more complex issues to higher levels. *Contrast with "advanced level," "developmental level," and "objective level."*

Entry professional: "The administrator may establish by rule an entry professional class program for use in a wide range of entry professional positions." *See s. 230.22, Wis. Stats.; Ch. ER 8, Wis. Adm. Code; WHRH Ch. 148.*

Entry Professional Program: Program designed to facilitate hiring of entry-level professional employees. Program includes a specific set of classifications for which candidates generally have academic preparation and little or no work experience. Includes flexible certification rules where the supervisor of the vacancy identifies the number of people he/she would like to interview.

Equal consideration: All candidates are treated the same from point of certification through the initial hiring process, commonly an employment interview. What is done for one candidate initially is done for the other.

Equal Employment Opportunity Commission (EEOC): A commission of the federal government charged with enforcing the provisions of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967, the Equal Pay Act of 1963, the Americans with Disabilities Act and other fair employment practices legislation. *Related to "adverse impact," "Affirmative Action," "Age Discrimination in Employment Act of 1967," "Americans with Disabilities Act of 1990," "Civil Rights Act," "discrimination," and "disparate treatment."*

Equal Employment Opportunity (EEO)/Affirmative Action (AA) Hiring Action Report: Formerly known as Missed Opportunities Report, it identifies demographic make-up of the certification list. Flags list where a minority or woman was certified and not hired.

Equal employment opportunity category (EEO CAT): A job category code designating the kind of work performed for affirmative action reporting purposes. *See Alphabetical Listing Of Classifications.*

Equal Pay Act of 1963: An amendment to the U.S. Fair Labor Standards Act of 1938 (FLSA) that prohibits sex-related pay differentials on jobs that are substantially equal in terms of skill, effort, responsibility and working conditions, and that are performed in the same location, except when such differentials are the result of bona fide seniority, merit- or production-based pay systems, or any other job-related factor other than sex.

Equal pay for comparable work: This doctrine is much broader than the U.S. Equal Pay Act of 1963. In effect, this doctrine moves beyond the four compensable factors embodied in the Equal Pay Act and specifies that so long as the work performed by women and men in question is comparable, charges of sex discrimination in pay can be brought under Title VII of the 1964 Civil Rights Act. In Gunther vs. County of Washington, the U.S. Supreme Court allowed plaintiffs to bring suit on sex discrimination in pay outside the narrow confines of equal work and under the broader confines of "equal pay for comparable work". NOTE: See Equal Pay Act.

Equal pay for equal work: This doctrine, embodied in the U.S. Equal Pay Act of 1963, is intended to protect women from sex discrimination in pay. It reads that women may not be paid less than men on jobs that are substantially equal in terms of four compensable factors: effort, skill, responsibility, and working conditions. The intent of the doctrine is that neither women nor men suffer from sex discrimination in pay. *Similar to "comparable worth."*

Equivalent position: A position that is virtually identical to the employe's former position in terms of pay, benefits, and working conditions, including privileges, perquisites, and status. It involves the same or substantially similar duties and responsibilities, which entail substantially equivalent skill, effort, responsibility, and authority; a position having equivalent compensation, benefits, working shift, hours of employment, and other terms and conditions of employment. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

ER-MRS 27: Administrative rules which authorize the director of BMRS to provide for exceptional methods and kinds of employment, enables the state, as an employer, to carry out its social, economic and community responsibilities through employment of individuals who are economically disadvantaged or handicapped, or to meet the needs of the service during periods of disaster or national emergency or to comply with special funding requirement for specific positions.

Ergonomics: A field of study that evaluates and designs work environments, jobs, tasks, equipment, and processes in relation to human capabilities and interactions. As a management tool, the effective use of ergonomics can lower medical and workers' compensation costs, reduce accidents and errors, and decrease absenteeism and turnover.

Error type: Defaults to standard error of measurement. Users calculating other types of error may enter the results directly into the estimated error field and identify the applicable type in this field.

Escalator clause: A contract clause that ties wage rates to the cost of living during the period of the agreement. *Related to "collective bargaining agreements," "cost of living adjustment," "sweetheart contract," and "zipper clause."*

Essay examination: Highly structured written examination that uses open-ended and structured rating criteria (benchmarks) to grade responses. Applicants may be asked to evaluate and respond to hypothetical situations. Essay exams are administered in a controlled environment (exam center or special center) and are scored by a rating panel of job experts.

Establishment: A distinct physical place of business. Activities conducted at different and separate locations, even though similar or related, generally are not parts of a single establishment.

Estimated Error: Indicates a value associated with the amount of error in measuring applicants' knowledge, skills and abilities in the assessment process. The Standard Error or Standard Error of the Mean is an estimate of the standard deviation of the sampling distribution of means, based on the data from one or more random samples. Numerically, it is equal to the square root of the quantity obtained when s squared is divided by the size of the sample.

Estimated Test Duration: The estimated amount of time to complete the assessment part. This is typically used for centered assessments.

Exam: See "Examination."

Exam (Assessment) Item: The lowest level of the assessment structure for which score or response data will be received. Items are contained within assessment parts.

Exam (Assessment) Item Score: An evaluation for an Item when Scoring Criteria are applied.

Exam (Assessment) Master: Contains information about the assessment, i.e., exam number, assessment title, organization, reuse and retest waiting periods, the exam versions associated with that exam master, etc.

Exam (Assessment) Master Structure: The structure of the assessment items and parts with the "criteria detail" identified for each item and part. The Criteria Detail is inclusive of Detail Item Number, Answer Type, Number of Choices, Correct Answer, Qualification, UWTE Reference.

Exam (Assessment) Number: An identification number for the assessment, which is the classification code plus a three-digit extender. The class code is assigned when the classification is attached to the exam master. The class code is assigned automatically (the next available number for the classification) by the system. The user can enter his/her own extender if needed.

Exam (Assessment) Part: A part within the assessment structure that contains either sub-parts or assessment items. (A logical grouping of one or more items.) *See "Examination Component."*

Exam Plan: Combines critical tasks, skills, and knowledge areas identified in the job analysis into several distinct, measurable groupings referred to as dimensions. Subject matter experts, generally senior incumbents or immediate

supervisors, assist with developing the exam plan because they have direct, recent, and firsthand contact with the job. (Exam plans are no longer required)

Exam (Assessment) Response: Information provided by the Applicant related to an Exam (Assessment) Item.

Exam (Assessment) Root: The top part of the exam; normally the title of the exam and/or classification title.

Exam (Assessment) Status: Identifies the status of the exam part. An exam must be in "approved" status before it can be used for scoring and/or creating a register.

Exam (Assessment)Template Structure: The "base" hierarchy structure of the exam items and parts.

Exam (Assessment) Type: The type of assessment being used for that part of the exam.

Examination (Exam): Questions or items presented to an applicant that relate directly to the specific behaviors or knowledge, skills, and abilities the employee will need to perform job tasks after a general orientation to the position. Criteria established to evaluate applicant qualifications. Criteria is based on job analysis information, position analysis, or other information documenting actual job tasks to be performed or skills and knowledge required to perform job tasks. Types of examinations include multiple-choice, essay, etc.

Examination Component: A separate and distinct part of an examination or examination process used as an assessment device. Examinations may be made up of a single component (for example, essay) or multiple components (for example, multiple choice and essay). *See "Exam Part."*

Examination (Assessment) waiver: A disabled applicant is not tested by standard means of assessment because testing would result in measurement of the individual's disability and not his or her ability to perform a job.

Exceptional employment situations: Employment opportunities in agencies where: (1) vacancies have been set aside, as part of an approved affirmative action plan, to provide training and permanent employment to disabled individuals; (2) special statutory or funding requirements for specific positions require applicants who meet established eligibility requirements; or (3) the employment situations occurs as a result of disaster or national emergency. (Also see "periods of disaster or national emergency.")

Exclusive representative: The employee organization which has won the right, usually through a secret ballot election, to be the sole representative of all employees in a bargaining unit.

Exclusion: Any state employee, limited term employees, sessional employees, project employees, supervisors, management employees and individuals who are privy to confidential matters affecting the employer-employee relationship, as well as all employees of the [Wisconsin Employment Relations] Commission and which are excluded from union representation and collective bargaining. *See s. 111.81(7)(13) and (19), Wis. Stats. and WHRH Ch. 324; similar to "confidential" and "nonrepresented."*

Exclusion statement: Used in classification specifications to indicate which types of job duties, or locations, are not included in a specific classification (series) title. *Related to "classification specification," "definition statement," "inclusion statement," and "job specification."*

Executive Employee: An employee who meets the requirements of the executive exemption.

Executive Order 11246: Prohibits discrimination by federal government contractors and subcontractors with fifty or more employees and contracts of $50,000 or more. The Order requires these contractors to take affirmative action to ensure equal opportunity, including adopting an Affirmative Action Plan for each contracting location. The Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) oversees compliance with Executive Order 11246. Noncompliance can result in cancellation, termination, or suspension of a contract and/or debarment (ineligibility for future government contracts).

Executive retirement category: An employment category within the WRS, for an employee who worked in the WRS in a qualifying executive position (i.e., Agency Head).

Executive salary group (ESG): Identified unclassified positions specified in s. 20.923(4)(c)3m, Wis. Stats., and some division administrators specified in the Compensation Plan which are compensated by statutory authority based upon their specific grouping. *See s. 20.923(4), (4m), (8), (9), and (12), Wis. Stats.*; *and Comp. Plan, Sec. B;3.03, contrast with "unclassified—non-executive salary group."*

Exempt: A term categorizing an employee as not subject to the overtime provisions of the Fair Labor Standards Act (FLSA). *See Comp. Plan, Sect, A 4.01(3); WHRH Ch. 520; Title 29, Part 541 of the Code of Federal Regulations; Alphabetical Listing of Classifications for classification status; contrast with "nonexempt;" related to "docking," "Fair Labor Standards Act," and "salaried employee."*

Expanded certification: Certification of registrants in addition to names, certified under basic (BAS) certification provisions, based on their inclusion in the following categories: veterans expanded certification (VET), disabled expanded certification (DEC), minority expanded certification (MEC), women expanded certification (WEC), and disabled eligible (DEL), in that order. Also see "veterans expanded certification," "disabled expanded certification," "minority expanded certification," and "women expanded certification." *See WHRH Chapter 212.*

Extend register: Before a register expires, the expiration date may be extended in order to lengthen the availability of the register for certification purposes.

Extended probationary period: The extension of the time period during which an employee's performance is evaluated upon appointment to a position. The extended period provides the employee with additional time to show that he/she is capable of performing the duties satisfactorily.

External equity: A measure of a classification's pay level or band or "going market rate" compared to that of its competitors. As a fairness criterion, external equity implies that the employer pays wages that correspond to prevailing, external market rates, as determined by market pricing. *Contrast with "internal equity;" related to "market adjustment," "market pricing," "market rates," "market-based salary increase budget," "pay survey," and "wage survey."*

External wage structure: The distribution of wage rates across external labor markets. The external wage structure defines the variety of different wage rates an employer faces across different occupations and different labor markets.

Extrinsic rewards: Work-related rewards received for performance that have value measurable in monetary or financial terms. The opposite is intrinsic rewards, which relates to personal satisfaction derived from performing a job well. *Contrast with "intrinsic reward;" related to "Discretionary Compensation Adjustment," "feedback," "incentive," "incentive compensation," "incentive eligible," "incentives," "merit increase," "merit progression," "merit rating," "non-cash incentive," and "Discretionary Compensation Performance Recognition Awards and payments."*

F ***F*** ***F***

Facilitator: Controls the process, not the content. From Wisconsin Employment Relations Commission consensus training.

Fact finding: A method of impasse resolution that involves investigation of a labor-management dispute by a neutral third party. A fact finder holds hearings regarding the positions of both sides and issues a report which recommends a settlement. The

report is advisory and is either accepted or rejected by the parties. *Related to "conciliation," "impasse," "labor dispute" and "mediation."*

Factor: One of the component parts or elements considered in producing a result; such as a job factor, factor analysis, etc.

Factor evaluation system (FES): A system in which positions are classified on the basis of the composite value of compensable job factors. *Related to "criteria."*

Factor comparison system: A job evaluation method in which a series of rankings are performed to assess which jobs contain more of each specific compensable factor than other jobs being evaluated. The factor rankings for the compensable factors of each job are assigned numerical values, weighted and then added together to determine the total job score. *Related to "criteria;" similar to "job content evaluation method(s)."*

Factor weight: In job evaluation, a weight assigned to each compensable factor to indicate relative importance. *Related to "criteria."*

Failed to Respond (FR): A report of action on a certification when the individual did not respond to an agency's request for response (to demonstrate interest in an existing vacancy) on or before the deadline indicated or fails to respond.

Failed to Show (FS): A report of action on a certification when the individual failed to appear for a mutually agreed interview and failed to give a valid reason within five working days of the appointment.

Fair Credit Reporting Act (FCRA)*:* A federal law (codified at 15 U.S.C. § 1681 et seq.) that regulates the collection, dissemination, and use of consumer credit information. Along with the Fair Debt Collection Practices Act, it forms the base of consumer credit rights in the United States.

Fair Labor Standards Act (FLSA): As it relates to state employees, a federal law governing the minimum wage, compensation for hours worked over 40 in a workweek, child labor, and recordkeeping requirements. Although state law and/or collective bargaining agreements may establish higher standards, they cannot establish lower standards or waiver from federal provisions. *See WHRH Ch. 520 for a glossary of terms related to administration of the FLSA; Title 29, Part 541 of the Code of Federal Regulations; Alphabetical Listing of Classification for classification status; related to "docking," "exempt," "hours of work," "nonexempt, "overtime," and "salaried employee."*

FLSA Overtime-Fire Protection: All time worked in excess of 212 hours in a work period of 28 consecutive days for an agency, or agencies in a joint employment situation.

FLSA Overtime-General: All time that a nonexempt employee works in excess of 40 hours per workweek for an agency, or agencies in a joint employment situation. This excludes paid leave time and compensatory time off. (Note: Collective bargaining agreements may contain language that provides for premium pay [i.e., "overtime"] for all time in pay status, including vacation, sick leave, etc., and must be consulted when calculating the "overtime" that may be due to represented employees.)

FLSA Overtime – Hospital & Residential Care Establishments: Upon prior agreement of the employer and employee (or employer and the employee's representative for represented employees), all hours worked in excess of 8 in a day or 80 in a 14 day work period whichever is the greater number of overtime hours. If no agreement has been reached, then "FLSA Overtime-General" applies.

FLSA Overtime-Law Enforcement: All time worked in excess of 171 hours in a work period of 28 consecutive days.

Fair share agreement: "An agreement between the employer and a labor organization representing employees or supervisors under which all of the employees or supervisors in a collective bargaining unit are required to pay their proportionate share of the cost of the collective bargaining process and contract administration measured by the amount of dues uniformly required of all members." *See s. 111.81(9), Wis. Stats.; similar to "maintenance of membership agreement;" contrast with "free rider."*

Family and Medical Leave Act (FMLA): Federal and state laws establishing certain minimum benefits relating to an employee's right to unpaid leave of absence for personal or family serious medical conditions, and/or for maternity, paternity or adoption of a child. *See WHRH Ch. 724; related to "Family Leave" and "Leave of Absence."*

Family leave: Time off, either paid or unpaid, provided for an employee to care for their own serious medical condition or a seriously ill family member, a new baby, or an adopted child. Family leave policies usually are broader than parental leave policies. *Related to "Family Medical Leave Act" and "Leave of Absence." See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Family member: (Unless defined differently under the applicable collective bargaining agreement) A member of the employee's immediate family as defined under s. ER 18.01(4), Wis. Adm. Code. For FMLA purposes: a spouse, parent, or child. (**Note** that the definition of "family member" is more restrictive than that of "immediate family" found in collective bargaining agreements and in s ER 18.01(4), Wis. Adm. Code.) *See "immediate family;" see WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Federal Unemployment Insurance Tax Act (FUTA): There is a federal-state unemployment insurance system that imposes compulsory unemployment insurance at the expense of employers or employers and employee jointly.

Federal Wage Garnishment Law: A section of the Consumer Credit Protection Act of 1968 (CCPA), which limits the amounts of an employee's salary which may be garnished by a creditor and prohibits an employer from dismissing an employee because of garnishment for any one indebtedness.

Feedback: Information about the state or outcome of a system that can be used to modify or correct a system's operation. As the term usually is used with respect to compensation, it relates to the process in which information about the status of performance is given to employees by supervisors. Monetary rewards constitute powerful feedback to employees about their performance; nonmonetary feedback, such as praise from the supervisor, also can provide strong motivation. Performance appraisals are an example of a feedback mechanism. *Related to "Discretionary Compensation Adjustment," "extrinsic rewards," "intrinsic rewards," "incentive," "merit increase" and "Discretionary Compensation Performance Recognition Awards and payments."*

Feeder groups: Job groups or classifications in which the most qualified applicants for the vacancy are likely to be found.

Fiduciary Responsibility*:* Positions where, under the Fiduciary Responsibility Law (s. 230.17(3), Wis. Stats.), the duties involve the following:

a. Handle, receipt for, or have custody of money, checks or securities, or account for supplies or other property; authorize (or make appropriations for) expenditures; approve, certify, sign or countersign checks, drafts, warrants, vouchers, orders or other documents providing for the paying over or delivery of money, securities, supplies or other property, or serve process; or
b. Maintain or audit accounts of money, checks, securities, time records, supplies or other property, or take physical inventories of money, checks, securities, supplies or other property.

This definition is also used in the State Procurement Operational Questionnaire for blanket employee bonds, also known as employee dishonesty bonds, issued by the Department of Administration.

Filled Position Transfer: Form of competition where an employee stays in the same position number and the position is assigned duties that result in the position remaining in the same classification or moving to a different classification assigned to the same or counterpart pay range. The incumbent is selected to remain in the same position, provided due consideration was given to other individuals and the

incumbent's qualifications for the position were assessed in relation to the job requirements.

Final column: The final scoring criteria/statistics for the assessment. These values equal the calculated values unless the override box is checked.

Final grade rank: The position an eligible applicant holds on a register, based on his or her final numerical grade in comparison to other applicants. No rank will exist for non-numerical results (i.e., eligible/ineligible).

Fire: Removing an employee from their position and state service. A firing can result if an employee commits a crime/felony; violates a serious work rule; or as the result of progressive discipline for work rules violations or inability to perform the job duties.

First year in second year cost: The projected cost to be incurred and charged against the Compensation Reserve during the second year of a biennium for economic adjustments effective during the first year of the biennium. *Same as "cost of the first year in the second year."*

Fiscal estimate: The estimated total cost of economic adjustments (wages and benefits) over a biennium. The cost may be expressed as general purpose revenue (GPR) costs or "all funds." The fiscal estimate is required by state law for any statutory proposals and tells how much a proposal is estimated to cost or save the state in dollar terms. As it relates to state employee collective bargaining agreements and to compensation plan recommendations, the fiscal estimate reports the fiscal effect of economic adjustments that are supplemented from the compensation reserve. *Related to "all funds cost," "all funds with fringe cost," "costing," and "variable fringe rate;" same as "contract cost."*

Fiscal year lump sum payment: An amount paid in lieu of a base pay adjustment, typically based on the number of projected work hours for an employee from the date of the corresponding base pay adjustment to the end of the fiscal year. *Same as "annualized lump sum payment."*

Flextime: A policy that allows employees to choose convenient starting and quitting times, and under some plans, extended lunchtime, while still requiring the standard number of hours each day or week. *Contrast with "nonstandard work period" and "standard work period;" related to "alternative work schedule" and "job sharing."*

Floor: Opposite of "cap." The lowest number of points equal to or higher than the "minimum" that will be awarded to an applicant for that item or part. Example: Floor = 3. On an Objective Inventory Questionnaire (OIQ), the question may ask candidates to identify the total number of credits they have in a particular area. The response scale may allow from zero to ten credits, but you may

not want to award any points for fewer than three credits. If they have fewer than three credits, their score will be a zero.

Free rider: An employee who is working in a bargaining unit and is eligible for union membership, but does not join the union. Unions argue that free riders receive all the benefits of the union contract, yet do not financially support the organization that makes those benefits possible. *Contrast with "fair share agreement."*

Frequency: The number of times (absolute frequency) or percentage of times (relative frequency) a value appears in a data set or in a category.

Frequent exposure: Foreseeable exposure of a recurrent nature, happening at short, but not necessarily predictable, intervals. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Fringe benefits: A term first used about 1943 by the War Labor Board to describe benefits such as vacation, holidays and pensions, which were thought to be "on the fringe of wages." Given that employee benefits now increase direct wage costs by more than 40 percent, the term is widely considered to be obsolete. *Related to "holidays," "pay for time not worked," "sick leave," "time off with pay," and "Travel Schedule Amounts;" similar to "employee benefits," "inside payroll costs," and "noncontributory benefit plan."*

Front-end bonus: A specific bonus given at the beginning of a service period, usually for accepting an employment offer. It could also be used at the beginning of a new reward program. Also called a signing bonus, it typically is used to offset forfeited benefits left behind.

Frozen payroll: The base payroll upon which economic calculations will be based for the forthcoming biennium. The payroll base is from a pay period that best represents the employee base, usually from the January of the last fiscal year before bargaining. Employee ranges and base hourly rates will be adjusted as needed to reflect pay range reassignments, anniversary adjustments, and other wage provisions scheduled to become effective between that date of the payroll snapshot and the end of the fiscal year.

Frozen payroll data: The payroll file for a specific pay period for a specific group used to develop internal and external estimates of the cost of economic adjustments over a biennium. *Related to "costing."*

Full performance level: The level at which the employee demonstrates the expected degree of skill or competence in the satisfactory completion of the duties and responsibilities assigned to the position. *Related to "advanced level" and "objective level."*

Full time equivalence (FTE): The amount of hours budgeted for a position. A position budgeted for 80 hours in a bi-weekly pay period would be 1 FTE; a position budgeted for 40 hours in a bi-weekly pay period would be .5 FTE.

Funeral leave: Authorized use of sick leave for travel to and attendance at the funeral of immediate family members. *Same as "bereavement leave."*

Functional supervision: The authority exercised by an employee over staff in an organization engaged in carrying out work over which the employee has functional responsibility (accountability).

G ***G*** ***G***

Garnishment: Deducting from the pay of an employee an amount of money order by the court. An employee's pay may be garnished non-payment of support, back taxes owed, etc. *Similar to "docking."*

Gender group: When used in connection with affirmative action, does not include groups discriminated against because of sexual orientation, as defined in s. 111.32(13m), Wis. Stats.

General Purpose Revenue (GPR): General taxes, miscellaneous receipts and revenues collected by state agencies which are paid into a specific fund, lose their identity, and are then available for appropriation by the Legislature. *See s. 20.001(2)(a), Wis. Stats.; contrast with "program revenue" and "segregated fund;" related to "compensation reserve."*

General retirement category: A retirement employment category within the WRS for employment that is not considered an executive or protective or teacher category position (i.e., majority of state employees are considered "General").

General Supervision: Implies that the work is performed independently. The incumbent seldom refers matters to the supervisor except for clarification of policy.

Generate (Register): Button used to add registrants (for the first time) to the register.

Get More Names: After initial certification certified registrants are assigned Reports of Action; thereafter, application of the same certification rules are made to the register in order to get additional names (may be generated from changes in applicants' status, eligibility or integration of additional names onto the register).

GPR cost: The estimated dollar cost of the economic component of a collective bargaining agreement or compensation plan provision that would be funded from

general purpose revenue (compensation reserve), as opposed to that funded from other sources, such as program revenue or segregated fund fees.

GPR split: A statewide percent developed by the Department of Administration which is applied to compensation reserve expenditures that will be funded from GPR funds. The GPR split percentage is used by DPM in fiscal estimates of economic adjustments that will be funded from the compensation reserve, and will be submitted to the Joint Committee on Employment Relations. In association with collective bargaining agreements and compensation plan recommendations, the GPR split percent is applied uniformly to all economic adjustments regardless of the funding sources of the employee group or employing unit agency.

GPR with variable fringe cost: The estimated GPR cost increased by the percentage of variable fringe rate costs.

General supervision: Implies that the work is performed independently. The incumbent seldom refers matters to supervisor except for clarification of policy. *Contrast with "close supervision" and "limited supervision."*

General wage adjustment: The wage increase granted to eligible employees in a particular group, typically on or near the beginning of a fiscal year. Additional pay adjustments of a different type, e.g., market or stratification adjustments, might also be paid to all or some employees in a group on the same date or on other date(s) during the fiscal year. *See Comp. Plan, Sec. A 2.00; similar to "across the board increase," "back-end loading," "base pay rate," "pay adjustment," and "wage rate."*

Generally accepted accounting principles (GAAP): The principles and rules of accounting applicable to U.S. companies, as prescribed by the Financial Accounting Standards Board (FASB) and its predecessors, and as deemed required to apply to all public companies by rules established and enforced by the Securities and Exchange Commission (SEC).

Geographic differentials: Pay differences established for the same job based on variations in costs of living or costs of labor among two or more geographical areas.

Goalsharing: A group incentive plan that is designed to measure performance against future-oriented business objectives or performance targets (i.e., not against history). Also known as "performance sharing."

Goal statements on a position description: The expected results of each employee's work. They are the expected accomplishments, product or output that results from the work activities of the employee. *Related to "job description," "job duties," "worker activity;" same as "job duty."*

Going rate: Refers to the employer's best estimate of the wage rate that is prevailing in a labor market for a specific job.

Golden handcuffs: Employee benefits and/or payments or incentives linked to an individual's continued employment with an agency or the state. Leaving the agency or the state results in forfeiting the value.

Good faith and fair dealing: A concept that basically means acting on the basis of honest intentions and beliefs. The court would look to see that the employer did not act out of malice toward the employee and that there was no attempt to defraud or seek an unconscionable advantage over the employee.

Grade Notice: Communication of assessment results that is distributed via email to applicants who have competed in an assessment process. Notice includes civil service score, rank (if applicable), and other assessment results (e.g. eligible, band, etc.). Also identifies employment areas and special qualifications that the applicant may have indicated in the application process.

Gradual: If the duties which constitute the reason for the class level change were previously at least 26 percent of the position, the expansion of such duties to 51 percent of the total position is considered to be a gradual change. Changes are not gradual if they constitute a significant portion of the position (more than 25 percent) and occur abruptly (over a period of less than six months); or result from a reorganization, changes in the equipment used to perform the work, or a reassignment of duties from a vacant or abolished position; or result from the removal of a supervisory level. *See WHRH Ch. 370; related to "audit," "logical," "reclassification," "regrade," and "upgrading."*

Grid: A matrix of specified hourly amounts (grid rates) within each range.

Grid endpoint: The last rate of pay indicated on a grid structure; the last designated progression rate within a range.

Grid point: A location within a pay range associated with a particular grid seniority or pay level. *Related to "progression" and "seniority-based grid."*

Grid rate: The rate of pay associated with a grid point in a pay range. *Related to "seniority-based grid."*

Grid seniority: An employee's or former employee's full years of seniority on the date used to determine seniority level for purposes of implementing the most current grid for the applicable bargaining unit or nonrepresented employee group. This term applies only to seniority-based grids. *Related to "seniority-based grid."*

Grid step: Generally, the value of the difference between grid points within the same pay range in a grid. In some grids, the value of the grid step is not constant within a pay range. Unless specified, the grid step is not used for ongoing pay

administration purposes. *Related to "within range pay step" and "seniority-based grid."*

Grievance: A written complaint by an employee requesting relief in a matter which is of concern or dissatisfaction relating to conditions of employment or adverse employment decisions and which is subject to the control of the employer and within the limitations of Wisconsin Statutes and the Wisconsin Administrative Code. For represented employees, it is usually concerning the interpretation or application of the contract. *See s. 230.445, Wis. Stats; s. ER 46.02(4), Wis. Adm. Code and collective bargaining agreements; related to "past practice."*

Group Grievance: "A grievance filed by more than one grievant which involves like circumstances and facts for the grievants involved." *See s. ER 46.02(6), Wis. Adm. Code and collective bargaining agreements.*

Group Referral: A methodology used to generate additional names (minimum of 6, maximum of 200) for multiple vacancies, polling for interest or polling for special qualifications. Based on those who respond, certification is generated based on the selected certification rule.

Guideline: Information communicated in written or oral form which provides the context in which the work is to be accomplished or imposes constraints on what work is done and in what manner. Guidelines may include manuals, established procedures, precedents, policies and regulations, judicial decisions, traditional and professional practices, and references materials.

H H H

Halo effect: A rater's failure to differentiate among various aspects of an individual's performance because one outstanding factor has undue influence over all the other factors. The undesirable effect that an overall impression (or the impression from the first few questions) may have upon raters' judgments of answers to different questions. This occurs when forming a general impression of an applicant by letting one area of their attribute influence and bias the rater's impression of other areas. *Contrast with "reliability;" related to "rating bias."*

Handicapped individual: Under federal law, any individual who (1) has a physical or mental impairment that substantially limits one more of his or her major life activities; (2) has a record of impairment; or (3) is regarded as having such an impairment. A handicap is substantially limiting if it is likely to cause difficulty in securing, retaining, or advancing in employment. The term "Qualified Handicapped Individual" refers to a person with a disability who is capable of performing the essential functions of a particular job with *reasonable accommodation* to his or her handicap.

Hardship allowance/premium: An amount of compensation that bears no relation to the work to be done or to living costs, but is paid in recognition of extraordinarily difficult living conditions, harsh environment, isolation, political unrest, or special health problems.

Harassment: Any occurrence of unwanted or unwelcome verbalism or behavior of a sexist-, racist-, or age-related nature or with overtones related to a protected characteristic.

Hazardous employment: Hazardous employment is established under *s. 230.36, Wis. Stats.* It provides full pay without loss of any benefits or requirement to use any paid leave credits, to certain employees as defined by the law or contract who are injured in the line of work and while the employee is unable to return to work as the result of the injury or until the termination of his or her employment upon recommendation of the appointing authority. *See Ch. ER 28, Wis. Adm. Code; WHRH Ch. 708; contrast with "protective occupation participant status" and "worker's compensation."*

Headquarters city: The facility or location to which an employee is normally assigned by the employer as a headquarters and from which he or she performs his or her assigned duties. *Same as "assigned headquarters;" related to "work site."*

Health care provider(s): See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.

Health Insurance Portability and Accountability Act of 1996 (HIPAA): Limits the circumstances under which coverage may be excluded for medical conditions present before an employee enrolls in a group plan. Under the law, a pre-existing condition exclusion generally may not be imposed for more than 12 months (18 months for a late enrollee). The 12-month (or 18-month) exclusion period is reduced by the employee's prior health coverage. The employee is entitled to a certificate that will show evidence of prior health coverage. If the employee buys health insurance other than through an employer group health plan, a certificate of previous coverage may help the employee obtain coverage without a pre-existing condition exclusion. For employer group health plans, these changes generally take effect at the beginning of the first plan year starting after June 30, 1997.

Hierarchy of needs: According to this theory, a person's needs must be satisfied in a hierarchical order. Higher-level needs such as esteem and status cannot be satisfied until lower-level needs such as food and shelter are met. This theory was developed by A.H. Maslow.

High degree of danger or peril: An incident of an adverse nature involving an actual or perceived threat of bodily harm to the public or the employee responsible for assuring the public's safety. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

High degree of physical conditioning: Demonstrated ability to complete standardized physical fitness and/or agility requirements on a regular basis, as determined by the employing agency, in order to effectively carry out the responsibilities of the position. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

High importance job content (HIJC): The identification of the tasks and knowledge which are important to successful job performance.

Higher pay range: The pay range which has the greater pay range dollar value maximum when comparing pay ranges not designated as counterparts. *Contrast with "counterpart pay ranges" and "lower pay range."*

Highly: Used to describe the relative degree of work in comparison between two or more levels. This term should only be used to describe work going far beyond the scope of the objective level. Normally, in a series of several classes, the adverb "very," such as very responsible or very technical, would be used in the preceding (objective level) class specification and an advance level would be highly responsible or technical. *Contrast with "very," related to "responsibility."*

Highly structured questionnaires: Also known as close ended questionnaires. A job analysis technique that provides a written set of questions regarding job content that limits responses to a predetermined set of answers. Questionnaires are either behavior-based or task-based, require validation, and are usually analyzed using a computer program designed for that purpose. *Contrast with "open ended questionnaire," related to "job analysis" and "job documentation."*

Hiring above the minimum (HAM) rate: A rate of pay upon original appointment to a classified position that is above the pay range minimum for that classification. *See Comp. Plan, Sec. E 1.03; WHRH Ch. 508; individual collective bargaining agreements for any reporting requirements or restrictions on the use of HAM for represented classifications; contrast with "hiring rate," "knowledge-based pay," "Raised Minimum Rate," and "temporary appointment maximum;" related to "person-based pay."*

Hiring rate: As a matter of wage policy, the beginning rate at which people typically are hired into a job. *Contrast with "Hiring Above the Minimum," "Raised Minimum Rate," and "temporary appointment maximum."*

Hits: The number of FTE or percentage receiving specific wage provision, such as across the board, market adjustment, lump sum payment, etc.

Holidays: Specific days when most employees do not work but are paid as if they did. Employees who do work on such days typically receive premium pay or compensatory time off. *See s. 230.35(4), Wis. Stats.; s. ER 18.05, Wis. Adm. Code; Comp. Plan, Sec. A 4.11; WHRH Ch. 716; related to "employee benefits," "fringe*

benefits," "inside payroll costs," "noncontributory benefit plan," "pay for time not worked," "sick leave," "time off with pay," and "Travel Schedule Amounts."

Hostile environment: Conduct which has the purpose or effect of unreasonably interfering with a person's job performance or creates an intimidating or offensive work environment.

Hours in a year: 2080 hours, unless otherwise specified.

Hours of work: Under the Fair Labor Standards Act (FLSA), all time that the employee actually works, as opposed to hours charged to some form of leave. *Related to "Fair Labor Standards Act" and "overtime."*

Hours worked: All time during which an employee is required or permitted to work or to wait for work when the employee is unable to use the working or waiting time effectively for his or her own purpose.

Household Effects: Personal effects of the employee and immediate family of the employee, such as furniture, clothing, musical instruments, household appliances, food and other items which are usual and necessary for the maintenance of a household and which may be transported legally in interstate and intrastate commerce. It does not include property which is for resale or disposal rather than for the use by the employee or employee's immediate family; nor does it include such items as automobiles; motorcycles and similar motor vehicles; boats; pets; farm tractors and farm equipment; livestock; trailers with or without other property (except a house trailer or mobile home used as the appointee's residence); building materials; fuels and belongings related to commercial enterprises engaged in by the employee or employee's family.

Human Resources (HR) Consultant: Working title for Executive Human Resources Specialists in BMRS responsible for classification and staffing.

I I I

Immediate annuity: An annuity, not including an annuity from additional contributions, which begins to accrue not later than 30 days after termination of employment. *See s. 40.02(38), Wis. Stats.*

Immediate family: An employee's spouse and an employee's relatives by marriage, consanguinity or adoption, and any other person who directly or indirectly receives more than one-half of their support from the employee, or from whom the employee directly or indirectly receives more than one-half of his or her support. Individuals specified in a collective bargaining agreement, administrative rules, or statutes, who have a legal, blood, or other specified type of relationship to an employee. "Immediate family" means: (a) parents, step-parents, grandparents,

foster parents, children, step-children, grandchildren, foster children, brothers and their spouses, sisters and their spouses, of the employee or spouse; (b) the spouse; (c) aunts and uncles, sons-in-law or daughters-in-law of the employee or spouse; and (d) other relatives of the employee or spouse providing they reside in the same household of the employee. *See ss. ER 18.01(4) and ER-MRS 24.03(5), Wis. Adm. Code. Consult the relevant collective bargaining agreement, rules or statutes for the definition of "immediate family" for a specific purpose.*

Immigrant: See "Permanent resident alien."

Immigration Reform and Control Act of 1986 (IRCA): Requires all employers to verify the employment authorization and identity of all employees hired after November 6, 1986. Employment authorization and identity must be verified and an INS Form I-9 completed within three days of the time that an individual accepts an offer of employment, or within three days of the time that employment actually commences.

Impact of work: The extent of the effect of the properly performed work on other functions both internal and external to the work unit. *Related to "accountability," "breadth," "complexity," "depth," "discretion," "knowledge, skills and abilities," "point factor system," "scope;" and "survey."*

Impasse: That point in labor-management negotiations at which either party determines that no further progress can be made toward reaching an agreement. In public sector labor relations, impasses are often resolved by the intervention of a neutral third party, such as a mediator, fact-finder, or arbitrator. *Related to "arbitration," "conciliation," "fact finding," and "mediation."*

***In loco parentis*:** Persons with day-to-day responsibilities to care for and financially support a child, or in the case of an employe, who had such responsibility for the employe when the employe was a child. A biological or legal relationship is not necessary. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Incapable of self-care: For FMLA purposes: The individual requires active assistance or supervision to provide daily self-care in three or more of the activities of daily living (ADLs) or instrumental activities of daily living (IADLs). Activities of daily living include adaptive activities such as caring appropriately for one's grooming and hygiene, bathing, dressing and eating. Instrumental activities of daily living include cooking, cleaning, shopping, taking public transportation, paying bills, maintaining a residence, using telephones and directories, using a post office, etc.

Incentive (pay plans): Pay plans designed to reward the accomplishment of specific results. Awards are usually tied to expected results identified at the beginning of the performance cycle. The plans can be individual, group, agency wide or a combination of any. *Related to "Discretionary Compensation Adjustment," "extrinsic rewards,"*

"feedback," "merit increase," and "Discretionary Compensation Performance Recognition Awards and payments."

Incentive compensation: Variable rewards for performance or achievement of short-term or long-term goals. Designed to stimulate employee performance. *Related to "Discretionary Compensation Adjustment," "extrinsic rewards," "feedback," "merit increase," and "Discretionary Compensation Performance Recognition Awards and payments."*

Incentive eligible: A term referring to groups or classes of employees who are eligible to participate in an incentive plan. *Related to "Discretionary Compensation Adjustment," "extrinsic rewards," "feedback," "merit increase," and "Discretionary Compensation Performance Recognition Awards and payments."*

Incentive payments: Within the context of international compensation, any one of a variety of payments in excess of base pay made as an inducement either to accept, remain on, or complete a foreign assignment.

Incentive progressivity: A concept whereby the percentage target potential of an incentive award is higher at higher income levels. May be applicable to either or both short term and long term incentives.

Incentives: Formula-driven, non-discretionary pay plans that are designed to reward the accomplishment of specific results. Awards usually are tied to expected results identified at the beginning of the performance cycle. Incentive plans are forward-looking, in contrast to bonuses. *Related to "extrinsic rewards."*

Incidental duties: Permanently assigned duties which occur occasionally. The frequency or trigger incident should be included in the position description, such as "once a month," "in the absence of," "in emergencies," etc. *Contrast with "acting assignments" and "temporary assignment."*

Inclusion statement: A brief summary of the type(s) of position(s), the responsibilities, and any required organizational structure of the position(s) included in a classification specification. *Related to "classification specification," "definition statement," "exclusion statement," and "job specifications."*

Incumbent: A person occupying and performing a job. *Same as "employee."*

Individual pay rate: The wage or salary level assigned to a given individual. Individual pay rates may vary for the same job or as a function of time and grade, performance, or other basis for establishing variation in the employee's value to the agency.

Injunction: A court order that stops individuals or groups from committing acts determined by the court to cause irreparable harm. Injunctions are issued frequently in public sector labor relations to stop illegal strike activity.

Inside payroll costs: Employee benefits costs that are not segregated as such, paid rest periods, and pay for time not worked for vacation, holidays, sick leave, etc. *Related to "employee benefits," "fringe benefits," "holidays," "noncontribution benefit plan," "pay for time not worked," "sick leave," "time off with pay," and "Travel Schedule Amounts."*

Integrate: Button used to add new registrants to an existing register.

Intermittent leave: Leave taken in separate blocks of time due to a single qualifying reason or on a reduced leave schedule (FMLA); partial absence from employment; leave taken in non-continuous increments (WFMLA).

Internal equity: A fairness criterion that directs an employer to establish wage rates that correspond to each job's relative value to the agency. *Contrast with "external equity," related to "compression" and "parity."*

Interrange differential: The difference between pay ranges at the same point of comparison, expressed as a percent, such as comparison from one pay range minimum to the minimum of the next higher pay range. *Contrast with "pay range spread," "pay range width," "range," and "range spread," similar to "pay range overlap."*

Interview: A formal meeting to asses the qualifications of a candidate for a position, with the objective of making a job offer. After a supervisor receives a certification list, he/she further assesses certified applicants' qualifications to select the best person for the job. An interview is comprised of the candidate and, typically, more than one person representing the agency. This process is managed by individual agencies. (See "Interview panel.")

Interview panel: A group of interviewers, typically comprised of two or more job experts.

Intrinsic motivation: Employee satisfaction contingent upon job content or job context, as opposed to job consequences. It is a result of factors such as the opportunity to perform meaningful work, experience complete cycles of work or finished products, experience variety, and receive feedback on successful work results. *Contrast with "Discretionary Compensation Adjustment," "extrinsic rewards," "incentive," "incentive compensation," "incentive eligible," "incentive payment," "incentives," "merit increase," and "Discretionary Compensation Performance Recognition Awards and payments;" similar to "intrinsic rewards," "job satisfaction," and "nonfinancial reward."*

Intrinsic rewards: Rewards that are associated with the job itself, such as the opportunity to perform meaningful work, complete cycles of work, see finished products, experience variety, receive professional development training, enjoy good relations with co-workers and supervisors and receive feedback on work results. *Contrast with "Discretionary Compensation Adjustment," "extrinsic rewards," "incentive rewards," "incentive compensation," "incentive eligible," "incentive payment," "incentives," "merit increases," and "Discretionary Compensation Performance Recognition Awards and payments;" similar to "feedback," "job satisfaction," and "nonfinancial reward."*

Invalid appointment: "Any person employed or appointed contrary to this subchapter, or to the rules established there under, shall be paid by the appointing authority so employing or appointing, or attempting to employ or appoint that person, the compensation agreed upon for any service performed under such appointment or employment, or attempted appointment or employment, or in case no compensation is agreed upon, the actual value of such services and any experiences incurred in connection therewith, and shall have a cause of action against such appointing authority, for such sum and for the costs of the action. No appointing authority shall be reimbursed by the state for any sums so paid or recovered in any such action." *See s. 230.41, Wis. Stats.*

J J J

Job action: Any concerted effort by employees to exert pressure on management during negotiations by using tactics which affect the quality and/or quantity of their work performance. *Related to "blue flu," "boycott," "collective bargaining," "concerted activity," "picketing," "red flu," "sitdown strike," "slowdown," "strike," "sympathy strike," "unfair labor practice," and "white flu."*

Job analysis: Also known as position analysis, the systematic, formal study of the duties and responsibilities that comprise job content; an in-depth review of a position to ensure the goals and tasks are adequately described. The process seeks to obtain important and relevant information about the nature and level of the work performed and the specifications required for an incumbent to perform the job at a competent level. *Related to "highly structured questionnaires" and "job documentation."*

Job analysis interview: A method for gathering information about a job by conducting a question-and-answer session with a person who is knowledgeable about that job. *Similar to "audit."*

Job announcement: Written notification of job opportunities in Wisconsin civil service appearing on WiscJobs. Job announcements will be open. "Open" job announcements allow for both state and non-state employees to apply. "Promotional" job announcements are restricted to current classified state

employees, including seasonal and probationary employees who are not serving on a limited term or project employment basis. *See WHRH Chapter 136—Job Announcements.*

Job announcement code: A number or combination of numbers and letters used to identify an announcement for a vacancy.

Job class code: See "Classification code."

Job cluster: A series of jobs, clustered for job evaluation and wage-and-salary administration purposes on the basis of common skills, occupational qualifications, technology, licensing, working conditions, union jurisdictions, workplace, career paths, and organizational tradition. *Related to "slotting;" similar to "benchmark job," "job worth hierarchy," and "scattergram."*

Job component: A quantitative form of job content evaluation that uses multiple regression of market pay levels versus two or more independent variables to establish a job worth hierarchy. *Similar to "quantitative job evaluation."*

Job content evaluation method(s): Methods that use job content as the primary determinant in developing a job worth hierarchy. With these methods, market pay levels are typically a secondary influence on the job worth hierarchy. Point factor is the most commonly used method. *Contrast with "nonquantitative job evaluation;" related to "job evaluation" and " job worth hierarchy;" similar to "factor comparison system" and "quantitative job evaluation."*

Job description: A summary of the most important features of a job, including the general nature of the work performed (duties and responsibilities) and level (i.e., skill, effort, responsibility and working conditions) of the work performed. It typically includes job specifications that include employee characteristics required for competent performance of the job. A job description should describe and focus on the job itself and not on any specific individual who might fill the job. *Related to "Bona Fide Occupational Qualification," "disclaimer statement," "goal statements on a position description," "job duties," "job specifications," "knowledge, skills and abilities," "task;" similar to "position description."*

Job documentation: Written information about job content typically resulting from job analysis efforts. Documentation includes, but is not limited to, job descriptions, completed questionnaires, interview notes, diaries or logs, and efficiency study reports. *Related to "highly structured questionnaires" and "job analysis."*

Job duties: The specific tasks the employee performs to accomplish the goals. "Worker activity" statements describe what a worker actually does. *Related to "goal statements on a position description," "job description," "position description," and "task;" same as "worker activities."*

Job enlargement: The practice of adding more tasks of a similar nature or a similar level of difficulty to a specific job (i.e., horizontal expansion of duties and/or responsibilities).

Job enrichment: The practice of adding more responsibility and/or diversity to a specific job to make it more challenging for the incumbent (i.e., vertical expansion of duties and/or responsibilities).

Job evaluation: A formal process used to create a job worth hierarchy within an organization. *Related to "job content evaluation method" and "job worth hierarchy."*

Job family: A group of jobs having the same nature of work (e.g., accounting) but requiring different levels of skill, effort, responsibility or working conditions (e.g., Accountant Entry vs. Accountant Senior).

Job grade: One of the classes, levels, or groups into which jobs of the same or similar value are grouped for compensation purposes. Usually, all jobs in a grade have the same pay range: minimum, midpoint and maximum. However, sometimes different jobs in the same pay grade have different pay ranges, due to market conditions for some of the jobs. *Similar to "classification;" related to "allocation pattern."*

Job groups: Sets of classifications combined by the Division of Personnel Management on the basis of similarity in the nature of the work, required education, training and skills, responsibility and pay range. A data processing code indicating the grouping to which a classification is assigned for affirmative action planning purposes. *See Alphabetical Listing of Classifications.*

Job order: A form submitted by a supervisor in order to obtain a certification for certain class titles. Specifies the scoring process that should be applied to the assessment, including mandatory and desirable items, groups of items, etc. that are tailored to the vacancy at hand.

Job responsibility: One or a group of duties that identifies and describes the major purpose or reason for the existence of the job.

Job satisfaction: An indication of how well a person "likes" his or her work, usually determined by a number of factors, including pay, promotional opportunities, supervision, co-workers and the work itself. When there is a discrepancy between an individual's values and preferences and what the job provides, job satisfaction is reduced. *Related to "intrinsic rewards" and "nonfinancial reward."*

Job sharing: An arrangement that allows two or more employees, each working part-time, to share responsibility for a single job and arrange their vacations and days off

so one is always at work during the normal work week. *Related to "alternative work schedule" and "flextime."*

Job specifications: A description of the worker characteristics (i.e., knowledge, skills, abilities and competencies) required to competently perform a given job. These characteristics must be bona fide occupational qualifications (BFOQs), as opposed to a requirements that are artificially inflated and not actually required for competent job performance (e.g., requiring a college degree for all exempt jobs). Specifications, which are commonly referred to as "hiring" or "background" requirements, should be written before advertising or interviewing candidates for an open position. They should support the essential functions identified during job analysis to reduce potential liabilities under the Americans with Disabilities Act. *Related to "Bona Fide Occupational Qualification," "definition statement," "exclusion statement," "inclusion statement," "job description," "knowledge, skills and abilities," "position description" and "representative position."*

Job title: The descriptive name for the total collection of tasks, duties, and responsibilities assigned to one or more individuals whose positions have the same nature of work performed at the same level. Job titles should describe the nature and level of work performed. Titles often include the organizational function or geographic responsibility. *See s. 230.09(1)(b), Wis. Stats.; s. ER 2.03(1) Wis. Adm. Code; Alphabetical Listing of Classifications; same as "classification /class title."*

Job worth hierarchy: The perceived internal value of jobs in relationship to each other within an organization. The job worth hierarchy forms the basis for grouping similar jobs together and establishing salary ranges. *Related to "slotting;" similar to "benchmark job," "job cluster," "job content evaluation method," " job evaluation", and "ranking method of job evaluation."*

Joint Employment: Employment by two or more agencies when the employment by one agency is <u>not</u> completely disassociated from employment by the other agency or agencies. *See WHRH Chap. 520, Administration of the Fair Labor Standards Act.*

Just cause: Labor arbitrators have long applied a definition of "just cause". A definition that is useful today in employment law is: "Good and sufficient reason, related to the needs of business operations, and supported by demonstrable fact."

K K K

Knowledge: The depth of detailed understanding and the proficiency needed to complete the work at the objective level usually consists of information or facts such as work practices, rules and regulations, policies, theories and concepts, principles,

and processes which an employee must know and understand to be able to do the work. The degrees of knowledge include: (1) some knowledge which implies familiarity only with the elementary principles and terminology of the subject or subjects indicated; (2) knowledge implies sufficient knowledge of the subject to enable the employee to work effectively in a limited range of work situations; (3) considerable knowledge implies enough knowledge of the subject to enable the employee to work effectively in normal work situations of the class and with little direct supervision; this is the journeyman level; (4) extensive knowledge implies an advanced knowledge of the subject matter so as to permit solution of unusual as well as commonplace work problems, advising on technical questions and planning methods for difficult work situations; and (5) thorough knowledge implies an unusually broad and specialized knowledge and means that work calls for an almost complete mastery of the subject; it is used rarely and only for especially advanced positions.

Knowledge, skills and abilities (KSAs): Common job specifications. Knowledge refers to acquired mental information necessary to do the job (e.g., principles of nuclear physics), skills refers to acquired manual measurable behaviors (e.g., lathe operation), and abilities, to natural talents or acquired dexterity (e.g., capacity to lift 50 pounds). *Related to "accountability," "best-fit," "breadth," "Bona Fide Occupational Qualification," "complexity," "depth," "discretion," "impact of work," "job description," "point factor system," "scope," and "survey."*

Knowledge-based pay: A system of salary differentiation based on the formal education, related experience, or specialized training a professional employee has that qualifies the individual to deal with specific subject matter, or work effectively in a specific field. Salary level may not be dependent on whether the incumbent utilizes the knowledge. *Related to "appointment maximum," "hiring above the minimum," and "temporary appointment maximum."*

L ***L*** ***L***

Labor dispute: Any controversy between an employer and the majority of the employer's employees in a collective bargaining unit concerning the right or process or details of collective bargaining or the designation of representatives. Any organization with which either the employer or such majority is affiliated may be considered a party to the labor dispute. *See s. 111.81(11), Wis. Stats. Related to "fact finding."*

Labor market: A place where labor is exchanged for wages. These places are identified and defined by a combination of the following factors: (1) geography (i.e., local, regional, national, international); (2) industrial area; (3) education, experience, and licensing or certification required; and (4) function or occupation.

Large department: A department with between 500 and 1,500 positions. *Related to "major department," "medium department," "small department," and "very small department."*

Law Enforcement Officer: Any person employed by the federal or state government, or any political subdivision of the state, including counties, cities, villages and towns, for the purpose of detecting and preventing crime and enforcing laws or ordinances and who is authorized to make arrests for violations of the laws or ordinances that the person is employed to enforce.

Layoff (permanent): "The termination of the services of an employee with permanent status in class from a position in a layoff group approved under *s. ER-MRS 22.05*, in which a reduction in force is to be accomplished." Approval is by the BMRS director, or agency head if delegated, in which a reduction in force is to be accomplished. *See s. 230.34, Wis. Stats.; ss. ER 2.01(15), 18.02(2)(b)7, and s. ER-MRS 22, Wis. Adm. Code; related to "attrition," "bumping," "demotion," and "downsizing."*

Layoff group: An aggregation of related positions which is the group of employees from which the layoff will
be made. *See Chapter 232—Permanent Layoff of Nonrepresented Employees of the Wisconsin Human Resources Handbook.*

Lead auditor: Human Resources Consultant in BMRS responsible for overseeing the delegation auditing process. This person will act as a resource to others in the division and in other agencies.

Lead structure policy: A salary practice in which the structure is set at the beginning of a year to match the level it anticipates the competitive pay to reach at the end of the year. Throughout the year, the competition catches up with the plan structure.

Lead worker: An employee whose permanently assigned duties include training, assisting, guiding, instructing, assigning and reviewing the work of two or more permanent full-time equivalent classified employees in the Lead worker's work unit as assigned and documented on the work unit's organization chart. Lead workers do not have supervisory authority as defined under s. 111.81(19), Wis. Stats.

Usually, lead workers will be required to lead the work of two or more employees in order to be credited with lead worker duties. Lead workers cannot "share" the responsibility of leading the work of employees. For example, if two positions lead the work of one employee each and together jointly lead the work of one more employee, neither position will meet the definition of lead worker. In certain circumstances, leading the work of one other employee may justify lead worker status, if the employees are located in a geographically remote office or are in the field. *See WHRH Ch. 370, section 030.*

Lead-lag structure policy: A salary policy that leads the market during the first six months, matches the competitive pay at the middle of the year and lags the market during the past six months. A variation of this process is the lag-lead structure, which is the opposite of the lead-lag policy.

Leave credits: (Unless defined differently under an applicable collective bargaining agreement) Except for those credits received as catastrophic leave under s. ER 18.15, Wis. Adm. Code, earned but unused termination leave, sabbatical leave, personal and legal holiday time, and anticipated or earned but unused annual leave, subject to s. 230.35(1)(b), Wis. Stats. Leave credits do not include sick leave credits or compensatory time off credits. *See ss. ER 18.01(5) and ER 18.15(1)(d), Wis. Adm. Code.*

Leave of absence: "Absence from employment with the approval of the appointing authority with or without loss of pay in accordance with the appropriate statutory provision or rule." A leave of absence may be paid or unpaid, and may also be authorized under a collective bargaining agreement. *See ss. ER 1.02(16), 18.02, and 18.14, Wis. Adm. Code; related to "family leave" and "Family Medical Leave Act."*

Lengthened probationary period: A longer, approved probationary period for administrative, technical, and professional positions when the normal (12-month) probationary period will not provide the employee with adequate exposure to the responsibilities of the position. The request for a lengthened probationary period must be submitted prior to certification.

Level of work: Critical data about job content that reflects the job's skill, effort, responsibility and working conditions.

Lift: (1) the percent the total base payroll will increase as a result of a base-building adjustment; (2) percent the total base payroll will increase over a fiscal year or biennium from all base building wage provisions; (3) the average percent base pay increase an employee will receive from a specific wage provision or during a fiscal year or biennium. *Related to "costing."*

Limited supervision: Implies that the incumbent proceeds on his or her own initiative while complying with policies, practices and procedures prescribed by the supervisor. The supervisor generally answers questions only on the more important phases of the work. *Contrast with "close supervision" and "general supervision."*

Limited term appointment: The appointment of a person to perform a grouping of duties and responsibilities on a non-project basis under conditions of employment that do not provide for attainment of permanent status in class under s. 230.26(1), Wis. Stats. *See s. ER-MRS 1.02(13), Wis. Adm. Code.*

Limited term employee (*LTE*): An individual in a position in which the nature and conditions do not permit attainment of permanent status in class and for which the

use of normal procedures for recruitment and assessment are not practicable or comparable employment in the unclassified service. (Normally employment that does not meet the coverage requirement would be considered comparable.) An LTE cannot work more than 1039 hours in a year in the same position. *See s. 230.26, Wis. Stats.; ss. ER 1.02(17) and ER 10, Wis. Adm. Code and Comp. Plan, Sec. D; WHRH Ch. 224.*

Limited term employment: Employment in which the nature and conditions do not permit attainment of permanent status in class and for which the use of normal procedures for recruitment and assessment are not practicable or comparable employment in the unclassified service. (Normally employment that does not meet the coverage requirement would be considered comparable.) *See s. 230.26, Wis. Stats.; ss. ER 1.02(17) and ER 10, Wis. Adm. Code and Comp. Plan, Sec. D; WHRH Ch. 224, and s. ER-MRS 1.02(14), Wis. Adm. Code*.

Line: Generally refers to the functions for which an organization was created. For example, in an engineering bureau, designing structures would be "line" functions. *Contrast with "staff."*

Living wage: In union contract negotiations, a term that refers to a wage rate that allows an employee to maintain an acceptable standard of living.

Lockout: The shutting down of an operation or plant by an employer in order to withhold work and wages from a group of workers. The intent of the employer is to pressure the workers into accepting the employer's terms during negotiations. This is management's version of a strike.

Logical: "Changes which are reasonably related to the previous duties or responsibilities of the position. Generally, if the changes are reasonably related to the previous duties, satisfactory performance of the original duties or responsibilities of the position should provide any incumbent with a reasonable expectation that the changed duties or responsibilities will be satisfactorily performed. If more than 50% of the duties or responsibilities of a position have changed since written notice was last given to the administrator and the employee of changes in assigned duties and responsibilities which may affect the classification of the position, the changes are not a logical change to a position but are the creation of a new position." It is not logical to assign job duties identified in a different bargaining unit or occupational area, such as assigning professional level duties to a technical or paraprofessional employee. *Related to "audit," "gradual," "reallocation," "reclassification," "regrade," and "upgrading."*

Longevity pay: Usually, the payment of an hourly or monthly amount based on an employee's length of service with an employer. At present, the state does not have a longevity pay program of this type. *Related to "seniority-based grid."*

Look-up table: A table that is referenced in a formula.

Lower classification: A class assigned to a lower pay range. *See s. ER-MRS 1.02(15).*

Lower pay range: A pay range which has a lesser dollar value maximum when comparing pay ranges not designated as counterparts. *Contrast with "counterpart pay ranges" and "higher pay range."*

Lump sum: In the context of wage adjustments, an amount of money paid to an employee for one or more of the following reasons: (1) a payment in lieu of retroactivity of a contractual or compensation plan pay adjustment, calculated by multiplying an employee's hours in pay status (hours worked or on paid leave) during a defined period by a specified amount; (2) an amount in lieu of a base pay increase, annualized from the effective date of the corresponding base pay adjustment to the end of the fiscal year; (3) a specified "bonus" that typically is pro-rated on the basis of an employee's FTE status. The use of (1) is very common and is often mistakenly referred to as a "retroactive wage payment." Where applicable, the lump sum payment also reflects an increase in the premium rate portion of any overtime wages earned during the defined period. *Related to "earnings."*

Lump sum merit: Merit pay delivered in the form of a single cash payment separate from base pay (i.e., not folded in). It must be "re-earned" annually. *Related to "Discretionary Compensation Adjustment" and "Discretionary Compensation Performance Recognition Awards and payments."*

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Maintenance of Membership (MOM) agreement: "An agreement between the employer and a labor organization representing public safety employees which requires that all of the public safety employees whose dues are being deducted from earnings under *s. 20.921(1) or 111.84(1)(f)* [*Wis. Stats.*,] at the time the agreement takes effect shall continue to have dues deducted for the duration of the agreement, and that dues shall be deducted from the earnings of all public safety employees who are hired on or after the effective date of the agreement." *See ss. 20.921(1), 111.81(12m), 111.84(1)(f), and 111.825(5), Wis. Stats.; related to "union security clauses;" similar to "fair share agreement."*

Major Department: A department with more than 1,500 positions. *Related to "large department," "medium department," "small department," and "very small department."*

Majority of time: Classification decisions are based upon the level of work performed for the "majority of time," 51 percent or more. Occasionally the level can only be determined by identifying the classification level of each worker activity statement to determine the majority, such as for a program assistant position. There may be very rare instances where a classification is appropriate when it does not represent the "majority of time;" however this would involve professional occupational areas

requiring a license, such as a physician. *Contrast with "significant job duties;" related to "allocation pattern," "best fit" and "classification method of job evaluation."*

Make whole: The redress of an individual who has been discriminated against by the employer or the resolution of a grievance if it is shown that management has violated the contract. It gives to the employee the same status enjoyed had there been no discrimination or contract violation.

Management: Includes those personnel engaged predominately in executive and managerial functions, including such officials as division administrators, bureau directors, institutional heads, and employees exercising similar functions and responsibilities as determined by the WERC. Management personnel is excluded from the definition of employee for collective bargaining purposes. *See s. 111.81(7)(a), Wis. Stats.; s. 111.81 (13),Wis. Stats; WHRH Ch. 324.*

Management by objective (MBO): An employee development technique that consists of a process in which a superior and a subordinate, or group of subordinates, jointly identify and establish common performance goals as a basis for directing behavior and assessing performance. The unique feature of "management by objective" is that the process requires involvement of subordinates in the setting of performance goals.

Management negotiating team (management team): The group of individuals from DPM and select representative operating agencies who are designated as the official representatives of management for purposes of negotiating an agreement with a specified bargaining unit. Typically, the chief spokesperson is an Executive Employment Relations Officer or Executive Human Resources Officer from DPM, who along with the other representatives from DPM, are considered the primary bargaining team. Agency representatives on the bargaining team are expected to represent the interests of their agency, as well as other agencies with similar employees or concerns, and, when authorized by the chief spokesperson, to communicate information to select management in their agencies during negotiations or once agreement has been reached.

Manager: "'Management' includes those personnel engaged predominately in executive and managerial functions, including such officials as division administrator, bureau directors, institutional heads and employees exercising similar functions and responsibilities." *See s. 111.81(13), Wis. Stats.; WHRH Ch. 324; Similar to "nonrepresented."*

Mandatory: Indicates that applicants must obtain a passing score on that item or part in order to pass the assessment.

Mandatory Restoration: Under state civil service law and code, restoration is the mandatory reappointment without competition, of an employee or former employee

to a position that is in the same class in which the person was previously employed, or to another classification to which the person would have been eligible to transfer to if there hadn't been a break in their employment, or to a class having a lower pay rate or pay range maximum for which the person is qualified to perform the work after receiving customary orientation that is provided to newly hired workers in the position.

Mandatory transfer: The lateral movement of an employee from one position to another in accordance with transfer provisions established in the applicable collective bargaining agreement. *Contrast with "administrative transfer;" related to "transfer;" same as "contractual transfer" and "union transfer."*

Market adjustment: A base pay adjustment provided to some or all employees in a particular classification that is intended to bring individual employees' pay up to or closer to a market rate. *Related to "external equity," "market pricing," "pay survey," and "wage survey."*

Market-based salary increase budget: A salary increase budget based on what the state's salary goals are with respect to the competition and availability of funding. *Related to "external equity," "market adjustment," "pay survey," and "wage survey."*

Market index: An index computed by dividing the pay received by an individual by the market pay for that job. This figure can be computed for groups, departments, or an entire organization. It is designed to provide a measure of how state pay compares to the market.

Market pricing: The technique of creating a job-worth hierarchy based on the "going rate" for benchmark jobs in the labor market(s) relevant to the organization. Under this method, job content is considered secondarily to ensure internal equity after a preliminary hierarchy is established based on market pay levels for benchmark jobs. All other jobs are "slotted" into the hierarchy based on whole job comparison. *Related to "external equity," "market adjustment," "pay survey," and "wage survey."*

Market rates: The employer's best estimate of the wage rates that are prevailing in the external labor market for a given job or occupation. *Related to "external equity," "market adjustment," "pay survey," and "wage survey."*

Market reserve: General purpose revenue funds set aside in the budgeted compensation reserve to provide market adjustments to classifications experiencing severe recruitment and retention problems. The amount of the market reserve funds is established and maintained by the Division of Personnel Management.

Maximum: The highest available score value possible for the item or part of an assessment.

Mean: A simple arithmetic average obtained by adding a set of numbers and then dividing the sum by the number of items in the set. *Contrast with "median" and "mode."*

Median: The middle item in a set of ranked data points containing an odd number of items. When an even number of items are ranked, the average of the two middle items is the median. Applied to labor market information: Median: This value is the base pay amount that represents the fiftieth percentile (50 percent) of responses. More specifically, it illustrates a base pay value with an equal number of values that were higher and lower in the sample. *Contrast with "mean" and "mode."*

Mediation: An attempt by an impartial third party, called a mediator, to bring together the parties in a labor dispute. The mediator, however, has no power to force a settlement. *Related to "arbitration," "conciliation," "fact finding," "impasse," and "labor dispute."*

Medical leave: Absence from employment due to a serious personal health condition which makes the employe unable to perform his or her employment duties. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Medium department: A department with between 100 and 499 positions. *Related to "large department," "major department," "small department" and "very small department."*

Merit increase: An adjustment to an individual's base pay rate based on performance or some other individual equity basis. *Related to "Discretionary Compensation Adjustment," "extrinsic rewards," "feedback," "incentive," "incentive eligible," "intrinsic rewards," and "Discretionary Compensation Performance Recognition Awards and payments."*

Merit pool: Total performance increase dollars available, expressed as a percentage of the payroll at the end of the preceding period.

Merit progression: A formula for progressing an employee through a wage structure according to performance, or some other individual equity basis. *Related to "Discretionary Compensation Adjustment," "extrinsic rewards," "feedback," "incentive," "merit increase," "merit rating" and "Discretionary Compensation Performance Recognition Awards and payments."*

Merit rating: A method for appraising the performance of an employee with respect to his or her job. It frequently serves as a basis for making pay adjustments, promotion decisions, or work reassignments. *Similar to "Discretionary Compensation Adjustments," "performance evaluation," and "Discretionary Compensation Performance Recognition Awards and payments."*

Midpoint: The salary that represents the middle of a given salary range or pay grade. *Related to "control point."*

Military leave: Employees who have permanent status and who are members of the national guard, the state defense force, or any other reserve component of the military forces of the United States are entitled to leaves of absence without loss of time in the service of the state. *See s. 230.35(3), Wis. Stats.; ss. ER 18.01(3), 18.08, and 18.13, Wis. Adm. Code.*

Milwaukee Graduate Assistants Association (MGAA): The Bargaining Unit for teaching assistants at Milwaukee Graduate school under Bargaining Unit designation T2.

Minimum: The lowest available score value for this item or part. Most assessments will have a minimum of 0.

Minimum Salary Test: Exempt Executive, Administrative and Professional employees must be paid a weekly salary at least equivalent to the federal minimum wage in effect regardless of the number of hours worked in the workweek.

Minority Expanded Certification (MEC): Allows for certification of additional registrants based on minority status (only applies if position is included in a job group that is underutilized for minorities).

Mismanagement: "A pattern of incompetent management actions which are wrongful, negligent, or arbitrary and capricious and which adversely affect the efficient accomplishment of an agency function. 'Mismanagement' does not mean the mere failure to act in accordance with a particular opinion regarding management techniques." *See s. 230.80(7), Wis. Stats.*

Mix of pay: The profile of various components of direct pay expressed as a percentage of the total (e.g., 50 percent base salary, 35 percent short-term incentives, 15 percent long-term incentives).

Mixed: Subject to the overtime provisions of the law unless an exception has been granted. *See WHRH Chap. 520, Administration of the Fair Labor Standards Act.*

Mode: The category or value that occurs most frequently in a set of observations. In a frequency distribution, it is the category with the highest frequency. Sometimes there is more than one mode. *Related to "mean," "median" and "regression-based modeling method."*

Model: A representation of reality that describes variables, the relationships among variables and the action of the system if changes are made in the variables or in the relationships. Models are major methods for examining alternative strategies and

policies. They are used to solve problems and to understand relationships between data sets. *Related to "regression-based modeling method."*

Moderate difficulty: The employee is confronted with a variety of breadth of duties susceptible to different methods of solution which in turn places a correspondingly higher demand on resourcefulness. Supervisors of employees engaged in routine assignments, journey level personnel, and paraprofessional employees usually perform work of moderate difficulty. *Related to "paraprofessional."*

Month: A calendar month or the period from a given date in one month through the date preceding the given date in the following month, whichever the context requires.

Multiple Choice Examination: A written exam used to assess basic skills or proficiency. Multiple choice (MC) exams may also be job knowledge exams used for promotional purposes. MC exams can be administered to large numbers of applicants in a controlled environment (e.g. exam center or special center).

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National Labor Relations Act of 1935 (Wagner Act): A federal law that gives employees the right to organize unions, bargain collectively and engage in concerted actions for mutual protection. It also required employers to recognize unions selected by employees and to bargain in good faith, and it prevented employers from certain unfair labor practices. *See Ch. 111, Wis. Stats. Related to "collective bargaining."*

Nature of work: The intrinsic characteristics and essence of work; kind or type; belonging to type or category. The nature of the work determines the occupational category and various subcategories. For example, the nature of the work of a position might be defined as: engineering (broad occupational area), non-professional (the sub-occupational area), clerical support (a further subdivision of non-professional), and supervisory (a specific category of clerical support). Analyzing the scope and complexity of the worker activities of a position often aids in determining the nature of the work.

New appointing authority or agency: The appointing authority or agency after the movement occurs within state service. The new appointing authority or agency may be the same as the former appointing authority or agency.

New Hire: Any prospective employee that is not currently a state employee, including former employees with reinstatement eligibility. Former employees with restoration rights are **not** considered a new hire upon restoration.

Night differential: Supplemental for hours worked between specified hours as set forth in the compensation plan or negotiated contract. *Similar to "add-on pay," "differential pay," "on-call pay," "premium rate," "pyramiding," "responsibility pay," "standby pay," "supplemental pay," and "weekend differential."*

Night hours: "Work hours between the hours of 6:00 p.m. and 6:00 a.m." *See Comp. Plan, Sec. A 4.01(4); see contract agreements.*

Node: An item or part that has been created at the Exam (Assessment) Template Structure.

Noncash incentive: Incentive payments that are not readily convertible to cash (e.g., extra time off, meal or merchandise awards, a reserved parking space) *Similar to "extrinsic rewards."*

Non-cognitive assessment: An assessment that is generally experience- and training-related and allows applicants to apply and test from home, e.g., Objective Inventory Questionnaire, Resume Screen, Training and Experience Assessment, etc. The assessment is not administered in a secure environment.

Noncontributory benefit plan: A program in which the employer pays the entire premium or the full cost of funding specific benefits. *Related to "employee benefits," "fringe benefits," "holidays," "inside payroll costs," "pay for time not worked," "sick leave," and "Travel Schedule Amounts."*

Nondelegated: Personnel transactions and classifications which require review and approval by DPM. *See ss. 230.04(1m) and 230.08(2), Wis. Stats.; contrast with "delegation."*

Nonexempt: A term categorizing an employee as subject to the overtime provisions of the Fair Labor Standards Act (FLSA). *See Comp. Plan, Sec. A 4.01(5); See WHRH Chap. 520, Administration of the Fair Labor Standards Act; Title 29, Part 541 of the Code of Federal Regulations; contrast with "exempt;" related to "docking" and "Fair Labor Standards Act.."*

Nonfinancial reward: Any form of recognition provided to employees other than cash. *Similar to "intrinsic rewards" and "job satisfaction."*

Nonimmigrant: An alien who seeks temporary entry to the United States for a specific purpose. The alien must have a permanent residence abroad (for most classes of admission) and qualify for the nonimmigrant classification sought. Nonimmigrant classifications include: foreign government officials, visitors for business and for pleasure, aliens in transit through the United States, treaty traders and investors, students, international representatives, temporary workers and trainees, representatives of foreign information media, exchange visitors, fiancé(e)s of U.S. citizens, intracompany transferees, NATO officials, religious workers, and

some others. Most nonimmigrants can be accompanied or joined by spouses and unmarried minor (or dependent) children.

Nonprofessional: All classification specifications that do not indicate professional or paraprofessional.

Nonprofessional supervisor: A supervisory position whose predominate job duties would not be defined as professional. *Contrast with "administrative supervision" and "professional supervisor."*

Nonquantitative job evaluation: A method that creates a job worth hierarchy based on the perceived value of the "whole job(s)" but does not employ quantitative methods (i.e., assigning evaluation "points"). Examples of nonquantitative methods are classification and ranking. *Contrast with "job content evaluation method" and "quantitative job evaluation;" similar to "paired comparison."*

Nonrepresented: Employees who are not represented for purposes of collective bargaining (they are excluded), because the classification(s) are not included in a certified bargaining unit, or because the classification(s) are included in a certified bargaining unit but no collective bargaining representative has been certified by the WERC. *See s. 111.81(7), Wis. Stats. Contrast with "represented position;" similar to "confidential," "exclusion," "manager," and "supervisor."*

Nonstandard work period: "A regularly recurring period of 336 hours in the form of 14 consecutive 24-hour periods which begins on a day of the week and time established by the appointing authority. Employees assigned a nonstandard work period are those employees who work a fixed schedule of more than 40 hours one week and less than 40 hours the next week." *See Comp. Plan, Sec. A 4.01(6). Contrast with "alternative work schedule," "flextime," and "standard workweek."*

Normal retirement date for protective occupation participant: The date on which a participant attains the age of 54 years if the participant has less than 25 years of service, or 53 years if the participant has 25 years of service or more. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Not available (NA): A report of action on a certification when a candidate is not available to interview within a reasonable timeframe, e.g. they are out of town for an extended period of time. This report of action is used infrequently.

Not contacted (NC): A report of action on a certification when a candidate was not contacted with an invitation to interview. It should only be used if the person hired was a transfer, reinstatement, or demotion and no one on the certification list was contacted or interviewed.

Not eligible (NE): A report of action on a certification when a candidate does not possess the qualifications for a job (i.e. the individual claimed to speak Spanish, but couldn't demonstrate the skill in the interview; or failed to produce a copy of a required certification). Additional justification is required for this report of action; may also require a removal of the applicant from the register or certification. The agency must document the basis of this decision.

Not interested (NI): A report of action on a certification when the individual stated that he/she is not interested in this position. Also used when an individual expresses an interest in a position and then cancels out of the interview.

Not selected (NS): A report of action on a certification; individual was interviewed for the position, but not selected.

Number of choices: Identifies the number of choices the applicant will have for responding to the assessment item (e.g., a true/false item would have two choices; multiple choice items commonly have four or five choices).

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Objective level: That classification level, within a classification progression series, that any employee could reasonably be expected to achieve with satisfactory performance of increasingly complex duties and/or the attainment of specified training, education, or experience. Objective level employees must satisfactorily perform the full range of job duties assigned to that position type under general supervision. *Contrast with "advanced level," "developmental level," and "entry level;" related to "full performance level."*

Objective Inventory Questionnaire (OIQ): A type of assessment which evaluates applicants on the basis of their experience with specific job tasks, tools, technologies, or equipment. The typical OIQ presents the applicant with a checklist of specific job statements about skills, tasks, tools, equipment, etc., and asks the applicant to identify their level of training and/or experience for numerous job-related tasks, tools, technologies, or equipment. Administered in an uncontrolled environment and may be scored by hand or by computer (using scannable response sheets). *Also known as task-based or checklist inventories.*

Occasional or sporadic: Work that is infrequent, irregular, or occurring in scattered instances, even when it recurs seasonally. However, work that recurs every other week is <u>not</u> occasional or sporadic.

Occupation: A generalized job or family of jobs common to multiple organizations or industries.

Occupational Category: The first three digits of the occupational codes found in the Dictionary of Occupational Titles are used as a guide to determine the occupational category.

Occupational differentials: Relatively stable differences in wage rates between or among occupations.

Occupational Outlook Handbook: A companion volume to the U.S. Dictionary of Occupational Titles, which provides general narrative information on jobs, job families, occupations, employment locations, etc. While of primary interest to vocational counselors, the Occupational Outlook Handbook does provide labor-market projections, which are useful for long-range human resource planning.

Official hourly rate rounding: The method of rounding used for all official computations of pay rates for state employees. The hourly rate will be increased to the next higher .01 if any digit is greater than zero in either the third, fourth or fifth position right of the decimal point. Lump sum hourly rates will be increased to the next higher .01 if any digit is greater than zero in either the third through the fifth position right of the decimal point. In costing, the "roundup" component is to be used with across the board (ATB) calculations. *See WHRH Ch. 504.*

On-call pay: An amount of compensation provided in return for an employee being available to report to work at employer's discretion. Because the employee is expected to be easily reachable and able to report to the work site on short notice, he or she is compensated for having restricted personal time. *Similar to "differential pay," "night differential," "premium rate," "pyramiding," "responsibility pay," "standby pay," "supplemental pay," and "weekend differential."*

One-Day Assignment: Assignment and travel are completed within a 24-hour period, midnight to midnight.

Open competition: All applicants, including current state employees and all other individuals eligible to work in the United States, may compete for the position.

Open-ended question: A type of interview question which does not require a yes or no answer but, instead, requires that the candidate talk about specific examples of past job experience(s) which are similar to the activities required of the position.

Open-ended questionnaire: A job analysis technique that provides a written set of questions regarding job content, requiring a narrative response. *Contrast with "highly structured questionnaires."*

Open pay system: A compensation program in which information about salary ranges and individual employee wages are public information. This information is public information under Wisconsin open record laws. *See ss. 19.21(1), 19.35, and 19.36, Wis. Stats.*

Oral evaluation: An evaluation using a set of standard questions that an applicant answers in the presence of a rating panel consisting of subject matter experts. The questions measure important abilities and knowledge identified in the job analysis. The oral evaluation must be recorded as indicated in s. 230.16(3), Wis. Stats.

Organizational level: The place in the organizational hierarchy, starting from the agency head, at which the position is found. The hierarchy goes from the appointing authority (agency head), division administrator, bureau director, section chief, unit supervisor, to subunit supervisor.

Organization chart: A graphic representation of the relationships and inter-relationships within an organization depicting the lines of authority, accountability, responsibility, and control provisions which are established for coordination. It may or may not include a listing of major duties or activities delegated to each office or position. An organization chart should be included with every personnel transaction.

Order of multiple transactions: The order in which multiple pay adjustments with the same effective date are to be applied. Unless otherwise specified in the collective bargaining agreement, the order of multiple transaction will be that specified in the*Compensation Plan*.

Original appointment: "The appointment of a person who has not attained permanent status in class or permanent status, or the appointment of a former employee on other than reinstatement or restoration basis to a classified position in which permanent status can be attained." *See s. ER-MRS 1.02(18) and s. ER 1.02(22), Wis. Adm. Code*.

Original appointment probation: The probationary period an employee is required to serve upon original appointment to a classified state position. *See s. 230.28, Wis. Stats.; s. ER-MRS 13.03(1), Wis. Adm. Code*.

Override (O/R): When this box is checked, the user should enter the new values into the planned column and they will carry over into the final column on the assessment part. This means that the system will ignore the scoring criteria and/or statistics that it calculated. The newly entered values will take precedence. This field would be used for adjusting the passing point.

Overtime: The Fair Labor Standards Act (FLSA) definition of overtime is hours over 40 worked in a workweek, or hours over 171 worked in a 28-day period for law enforcement personnel, or hours over 212 worked in a 28-day period for fire protection personnel. Individual collective bargaining agreements and the compensation plan have different provisions defining what is considered overtime and what compensation or scheduling requirements apply, many of which are more

generous than the overtime provisions provided under the FLSA. *See Compensation Plan, Section A 4.01(6); related to "hours of work."*

Paired comparison: A ranking technique that compares each job being evaluated individually to every other job in a pair-wise fashion to determine which job has a higher value. The final score for a job is the number of times it is considered the most valuable in the pair comparisons. Ranks then are created from these scores. *Similar to "nonquantitative job evaluation."*

Parameter: Compensation reserve funds allocated to the bargaining unit for all wage adjustments and lump sum payments for subsequent contract period. *Related to "compensation reserve."*

Paraprofessional: Work that is similar to or closely relating to and resembling "professional" level work, with a more limited scope of functions, decision making, and overall accountability; it does not have the breadth and depth of true professional work. A paraprofessional employee may perform duties that are a narrow, specialized subset of the professional employee's duties. A paraprofessional employee does not perform the full range of duties assigned to professional employees, or performs duties of lesser scope, impact, and complexity than duties assigned to professional employees. Paraprofessional duties tend to support the work of professional employees. A paraprofessional employee may carry out or implement plans or projects that are developed, planned, and managed by professional employees. The paraprofessional employee carries out or implements plans or projects based on extensive experience and supplemental on-the-job training rather than on formal academic education in the discipline itself. Paraprofessional work is performed in a narrow or highly specialized area of the overall occupation and requires a high degree of practical knowledge and skill. The experienced paraprofessional employee often works with considerable independence for significant periods of time. This independence, however, does not alter the nature and character of the work, which is to support a professional discipline. A paraprofessional position may have responsibility for segments of professional level functions but is not responsible for the full range and scope of functions expected of a professional position. *Contrast with "professional;" related to "moderate difficulty."*

Parent: Biological parent or an individual who stands or stood *in loco parentis* to an employe when the employe was a child. This term does ***not*** include parents "in-law" (FMLA). A natural parent, foster parent, adoptive parent, stepparent, or legal guardian of an employe or of an employe's spouse (WFMLA).

Parity: Pay provisions for nonrepresented employees to provide an average level of pay adjustments for the biennium that is comparable to the average level for the related group of represented employees. Typically, the authorization for parity adjustments is acquired through amendments or modifications to the compensation plan established at the beginning of the biennium. *Related to "compression" and "internal equity."*

Parolee: A parolee is an alien, appearing to be inadmissible to the inspecting officer [of the INS], allowed into the United States for urgent humanitarian reasons or when that alien's entry is determined to be for significant public benefit. Parole does not constitute a formal admission to the United States and confers temporary status only, requiring parolees to leave when the conditions supporting their parole cease to exist. *See WHRH Ch 220.*

Participant: Any person included within the provisions of the Wisconsin Retirement System by virtue of being or having been a participating employee whose account has not been closed under ss. 40.25(1) or (2), Wis. Stats. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Participating Employee: An employee who is currently in the service of, or an employee who is on leave of absence from, a participating employer under the Wisconsin Retirement System and who has met the requirements for inclusion within the provisions of the Wisconsin Retirement System under s. 40.22, Wis. Stats. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Participating Employer: Any State of Wisconsin employer subject to the provisions of each of the respective benefit plans covered under Chapter 40, Wis. Stats. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Passing Point: The minimally acceptable score for an item or part. If the item or part is not identified as mandatory, the value will only be used to calculate the system generated passing point at a higher level. If the item or part is identified as mandatory, an applicant must attain that score or higher on that portion to pass the assessment. A minimum acceptable standard, which may be a numerical score, a letter grade, or a determination of eligibility (e.g., a license requirement), determined to be the point at which an applicant has passed an assessment.

Past practice: A way of dealing with a grievance by considering the manner in which a similar issue was resolved before the present grievance was filed. Past practice is often used to resolve a grievance when contract language is ambiguous or contradictory, or when the contract doesn't address the matter in dispute. *Related to "grievance."*

Pay adjustment: A general revision of pay rates. The adjustment may be either across-the-board or spot adjustments for increases in prevailing wage rates. *Related*

to "across the board increase," "general wage adjustment" and "prevailing wage rate."

Pay band: A broad pay range that combines two or more pay ranges. Pay bands are designed to provide pay-setting flexibility and to improve recruitment and retention of critical employees. *See Comp. Plan, Sec. I; related to "appointment maximum" and "temporary appointment maximum;" similar to "band" and "broad banding."*

Pay-based grid: A grid structure that establishes an employee's position on the grid, and thus pay rate, based on the employee's hourly rate just prior to grid implementation. *Contrast with "seniority-based grid."*

Pay for time not worked: Refers to time off work with pay. Typically, it includes the following: holidays, vacations, personal days, jury duty, approved paid leaves, military duty, etc. Also known as time off with pay. *Related to "employee benefits," "fringe benefits," "holidays," "inside payroll costs," "noncontributory benefit plan," "sick leave," "time off with pay" and "travel schedule amounts."*

Pay plan: A schedule of pay rates or ranges for each job in the classification plan. May include rules of administration and the benefit package. *See ss. 230.09(1) and (2)(b), and 230.12 Wis. Stats.; similar to "salary structure."*

Pay policy: The desired position of an organization's pay with respect to competitive pay at a certain point in time. *Similar to "competitive pay policy" and "pay policy line."*

Pay policy line: The level at which the organization decides to set its pay against the external market; usually the midpoint of the salary structure is set as an estimate of the market going rate. *Similar to "competitive pay policy" and "pay policy."*

Pay range: A pay range typically consists of a minimum and maximum amount and a within-range pay step or transaction step and in some pay ranges, a PSICM amount; all of these are expressed in hourly amounts based on official hourly rate rounding. Each classification is assigned to a pay range by the Administrator of the Division of Personnel Management; for classifications included in a public safety represented bargaining unit, the assignment of classifications to pay ranges is subject to collective bargaining. *See ss. 230.09(1) and (2)(b); 230.12, and 111.825, 111.825(5), and 111.91, Wis. Stats.; related to "pay schedule" and "pay steps."*

Pay range overlap: The degree to which the pay ranges assigned to adjacent grades in a structure overlap. Numerically, the percentage of overlap between two adjacent pay ranges. *Contrast with "interrange differential," "pay range spread," "range," and "range spread."*

Pay range spread: The percentage by which the pay range maximum is greater than the pay range minimum. *Contrast with "interrange differential" and "pay range overlap;" same as "pay range width," "range," and "range spread."*

Pay range width: The width or spread of a pay range, measured by the ratio: Width = (maximum pay--minimum pay)/minimum pay. *Contrast with "interrange differential" and "pay range overlap;" same as "pay range spread," "range," and "range spread."*

Pay schedule: A set of pay ranges to which a set of classifications are assigned. Typically, separate pay schedules are negotiated under s. 111.91, Wis. Stats. for each eligible bargaining unit and established in the compensation plan for specified groups of nonrepresented classifications or bargaining units not covered by s. 111.91, Wis. Stats. *Related to "pay range."*

Pay status: The status of an employee when receiving payment for hours worked or paid leave. Pay status does not mean the status of an employee while on a leave of absence without pay, on layoff, serving a suspension without pay, or receiving income continuation or worker's compensation benefits. See *ER 1.02(24), Wis. Adm. Code; related to "work hours."*

Pay steps: Specified levels within a pay range. Employees may progress from step to step on the basis of time-in-grade, performance, or the acquisition of new job skills. *Related to "pay range."*

Pay survey: The gathering of data on wages and salaries paid by other employers for selected key classes of jobs or benchmark jobs. *Related to "external equity," "market adjustment," "market pricing," "market rates," "market-based salary increase budget;" same as "wage survey."*

Pay trend line: A line fitted to a scatter plot that treats pay as a function of job values. The most common technique for fitting a pay-trend line is regression analysis. *Related to "regression-based modeling method" and "scattergram."*

Peer comparison: A concept used in some incentive plans where a company's results in specified financial measures are compared with those of a group of other companies determined to be peer companies. The comparative results can be used in incentive formulas.

Percentage of time: The proportion of the employee's total work time spent on a goal or worker activity. Time percentages are estimates based upon a year and indicate how much time the employee is expected to spend on each goal. "Percentage of time" should be determined for worker activities if they are not equal in time to the other worker activities within a goal and equal more than 10 percent of that goal. *Related to "position description."*

Performance dimensions: Aspects of performance, critical to a job, on which the incumbent will be rated. Dimensions can be related to outcomes or behavioral criteria pertinent to the job assignment. *Similar to "performance evaluation."*

Performance evaluation: A continual process of identifying, measuring and developing job-related employee performance. *See ss. 230.28(2) and 230.37, Wis. Stats.; s. ER 45.02, Wis. Adm. Code; similar to "performance dimensions" and "performance log."*

Performance log: Written records used by a manager to recall examples of effective and ineffective behavior with respect to selected performance criteria during an appraisal period. *Related to "performance evaluation."*

Performance management: A managerial process that consists of planning performance, managing performance (through observation and feedback), improving performance through development, appraising performance, and rewarding performance.

Performance measurement: Any technique employed to gather data that provides a basis for exercising performance appraisal judgment.

Performance period: The predetermined span of time during which individual (or group) performance is measured.

Performance targets: Tasks or behavioral goals established for an employee that provide the comparative basis for performance appraisal.

Permanent appointment: " . . . [T]he appointment of a person to a classified position in which permanent status can be attained." s. ER-MRS 1.02(20), Wis. Adm. Code.

Permanent employee: A person who is an employee as a result of a permanent appointment, whether or not the employee has attained permanent status.

Permanent Resident Alien: "[A]n alien admitted to the United States as a lawful permanent resident. Permanent residents are also commonly referred to as immigrants; however, the Immigration and Nationality Act (INA) broadly defines an immigrant as any alien in the United States, except one legally admitted under specific nonimmigrant categories (INA section 101(a)(15)). An illegal alien who entered the United States without inspection, for example, would be strictly defined as an immigrant under the INA but is not a permanent resident alien. Lawful permanent residents are legally accorded the privilege of residing permanently in the United States. They may be issued immigrant visas by the Department of State overseas or adjusted to permanent resident status by the Immigration and Naturalization Service in the United States."

Permanent status: The rights and privileges attained upon successful completion of a probationary period or career executive trial period required upon appointment to a permanent, seasonal, or session position. *See s. ER 1.02(28) and s. ER-MRS 1.02(22), Wis. Adm. Code; contrast with "probationary period."*

Permanent status in class: The rights and privileges attained upon successful completion of a probationary period required upon an appointment to a permanent, seasonal, or sessional position. *See s. ER 1.02(29) and s. ER-MRS 1.02(23), Wis. Adm. Code; contrast with "probationary period."*

Permanent status in class minimum (PSICM): The minimum rate to be paid to an employee who is not serving the first six months of either a probationary period or a career executive trial period. (This term is applicable only to classifications assigned to traditional pay ranges, as opposed to those assigned to broadband pay ranges.)

Permissive Transfer: Non-contractual transfer (not mandatory) into the same or counterpart pay range. Each agency manages its own process for internal permissive transfers.

Person-based pay: Compensation programs that base an employee's salary on that individual's skills or knowledge rather than on the nature of a rigidly defined job. Types include skill-, knowledge-, and competency-based pay. *Related to "HAM."*

Philosophy: A means of translating the present state of an agency into concrete policy action to achieve the long-range goals of that agency.

Picketing: A person or persons stationed outside a place of employment, usually during a strike, to express a grievance or protest and discourage entry by nonstriking employs or customers. *Similar to "blue flu," "boycott," "collective bargaining," "concerted activity," "job action," "red flu," "sitdown strike," "slowdown," "strike," "sympathy strike," and "white flu."*

Piecemeal Move: The moving of household goods or property in two or more trips.

Planned Column: This column is used to identify the initial scoring criteria that are planned for an assessment.

Point factor system: A quantitative job evaluation method that uses defined factors and degree levels within each factor (usually five to seven levels, which are also defined). Each factor is weighted according to its importance. Job content descriptions are compared to definitions of the degree levels and the corresponding points assigned to the appropriate level are then awarded to the job and added for all factors to determine the total job score. The total scores are used to create a job worth hierarchy. *Related to "accountability," "breadth," "complexity," "depth,"*

"discretion," "impact of work," "knowledge, skills and abilities," "scope," and "survey."

Policy: A broad guideline or framework within which decisions are made regarding the distribution of program resources or benefits. Policy controls the nature of program outputs by defining what will be done, for whom it will be done, and the priorities to be applied to specific program objectives. *Contrast with "procedure."*

Policy analysis: The systematic study of an issue, problem, or decision situation requiring policy action designed to provide decision-makers with the information on the costs, benefits, or consequences of alternative courses of action or decisions needed in order to formulate policy. Typically, policy analysis involves defining the decision-maker's objectives, developing or clarifying alternative means to those objectives, assessing the impacts of alternatives by developing a model that projects their consequences, the establishment of criteria to rank the alternatives in order of desirability or priority, and the recommendation of the appropriate alternative to the policy-maker.

Polling: From a certification list generated via a group referral, registrants may be polled (via communictions & responses) to find out (1) if they have special qualifications that were not measured by the application or assessment process or (2) if they are interested in a particular position or geographic area.

Position: "A group of duties and responsibilities in either the classified or unclassified divisions of the civil service, which require the services of an employee on a part-time or full-time basis." *See s. 230.03(11), Wis. Stats.* For bargaining, a position is a unilateral solution to an issue. From WERC consensus training.

Position description (PD): "An appointing authority shall: Provide the administrator with current information relative to the assignment of duties to permanent classified positions in his or her agency." "After an appointing authority has received budgetary approval for a new position and desires to fill the position, a written description of the position's duties and responsibilities and any other pertinent information as required shall be submitted to the administrator." A structured statement describing the components of a position at the full performance level. A complete PD clearly specifies the goals or results which the employee is expected to achieve and significant worker activity or job task the employee must competently perform. *See ss. 230.06(1)(c) and 230.09(1), Wis. Stats.; s. ER 3.02(1);see WHRH Ch. 310; related to "Bona Fide Occupational Qualification," "disclaimer statement," "job description," "job specification,", "knowledge, skills and abilities," and "percentage of time."*

Pregnancy Discrimination Act of 1978 (PDA): Amends Title VII and states that women affected by pregnancy, childbirth, or related medical conditions must be treated the same for all employment related purposes as other employees not pregnant but similar in their ability or inability to work.

Premium rate: An amount added onto the base wage to pay extra for something such as weekend work, the graveyard shift, or being away from home. Also called differential. "The straight rate plus .5 times the regular rate paid the employee." *See Comp. Plan, Sec. A 4.01(7); similar to "add-on pay," "differential pay," "on-call pay," "pyramiding," "night differential," "responsibility pay," "shift differential," "supplemental pay," and "weekend differential."*

Prevailing wage rate: The amount paid by other employers in the labor market for similar work. The Davis Bacon Act of 1931 requires most federal contractors (in construction and related areas) to pay the wage rates and fringe benefits prevailing in the area. The McNamara-Ohara Service Contract Act of 1965 requires certain federal contractors who provide services to the federal government to pay area prevailing wage rates. *Related to "Wisconsin State Building Trades Negotiating Committee-WSBTC and Appropriate Affiliated Buildings Trades Councils."*

Primary Duty: A duty that encompasses over 50% of the employee's time. The 50% standard is a guide and determination of whether a duty is primary is not based on the percent time performing a duty in any single workweek.

Principal Duties: Those duties which are performed by an employee for at least 51 percent of the time. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Priority: The relative importance of a goal or objective in relation to others, which controls the timing and amount of resources, such as staff time, to be expended to achieve the goal or objective.

Probationary period: The time period during which an employee's performance is evaluated upon appointment to a position prior to attaining permanent status. *See s. 230.28, Wis. Stats. and s. ER 1.02(31) and s. ER-MRS 1.02(24), Wis. Adm. Code; WHRH Ch. 576; contrast with "permanent status."*

Procedure: The specific steps, rules, or methods followed in order to accomplish program objectives or implement policies. *Contrast with "policy."*

Proctor: An individual person designated to administer an examination (e.g., multiple choice, essay, on-line, etc.) to an applicant and who is responsible for ensuring that the examination materials remain secure in a controlled setting.

Professional: This word has different technical meanings based on the context of its usage. Unless otherwise defined in a document, the definition in the state compensation plan is used. [A.] "(a) Any employee in the classified service who is engaged in work: 1. Predominantly intellectual and varied in character as opposed to routine mental, manual, mechanical or physical work; 2. Involving the consistent

exercise of discretion and judgment in its performance; 3. Of such a character that the output produced or the result accomplished cannot be standardized in relation to a given period of time; 4. Requiring knowledge of an advanced type in a field of science or learning customarily acquired by a prolonged course of specialized intellectual instruction and study in an institution of higher learning or a hospital, as distinguished from a general academic education or from an apprenticeship or from training in the performance of routine mental, manual or physical processes; (b) Any employee in the classified service who: 1. Has completed the courses of specialized intellectual instruction and study described in par. (a)4.; and 2. Is performing related work under the supervision of a professional person to qualify to become a professional employee as defined in par. (a)." [B.] A similar definition of "professional" exists in the Fair Labor Standards Act. [C.] In less formal usage, it typically refers to classifications that are considered to be functioning at a level that clearly distinguishes them from paraprofessional or technical classifications. State labor relations law establishes nine professional bargaining units for classified positions: Education; Engineering and Related; Fiscal and Staff Services; Legal; Patient Care; Patient Treatment; Research, Statistics and Analysis; Science and Related; and Social Services. *See ss. 111.81(15) and 111.825(1), Wis. Stats.; Comp. Plan. Section G - 12.00; Title 29, Part 541 of the Code of Federal Regulations; WHRH Ch. 370; contrast with "paraprofessional."*

Professional Employees in Research, Statistics and Analysis - PERSA: The bargaining unit name of employees included in the "research analyst" bargaining unit, under bargaining unit designation 8.

Professional supervisor: A combination of supervisory and professional duties. The duties of the supervisor, not the staff supervised, should be the principal determinate as to whether a supervisory position is appropriately categorized as a "professional supervisor". A "professional supervisor" would be expected to provide technical supervision to subordinate staff. *See s. 111.81(19), Wis. Stats.; contrast with "administrative supervisor" and "nonprofessional supervisor."*

Program: An ongoing set of coordinated activities or functions carried out by a number of people, aimed at providing a specific service or benefit to a specific group, organization or group of organizations. A program typically has a unique set of policies, regulations, or procedures and a unique set of activities to be performed in providing service or achieving the program's goals, and a unique set of persons specializing in carrying these out. A program involves a variety of specific projects or functions coordinated to achieve program objectives.

Program evaluation: The systematic examination of an existing program or policy for the purpose of determining its effectiveness or efficiency in achieving its goal, by developing and applying quantitative measures of costs and/or benefits, to provide decision-makers with recommendations for the continuation, modification, or discontinuation of the program or underlying policy.

Program planning: The process of developing a specification of what a particular program will accomplish in the future and the courses of action that will be pursued to achieve those goals. To be complete in scope, program planning must involve defining program goals, developing and prioritizing specific objectives, developing alternative program designs or courses of action to achieve these objectives, and recommending appropriate priorities and alternatives to program administrators. Program planning which focuses on developing the specific processes, procedures, or operations necessary to implement overall program plans is called implementation planning. Implementation planning typically takes the overall design of the program as given, covers a shorter period of time, and is concerned with detailing specific parts of the overall design.

Program revenue (PR): Revenues which are paid into the general fund and are credited by law to an appropriation to finance a specified program or state agency. *See s. 20.001(2)(b), Wis. Stats.; contrast with "general purpose revenue" and "segregated fund."*

Progression: The act of moving towards a specified goal or outcome. [1] Pay progression: The movement or system of moving an employee's pay from the minimum towards the maximum or specified grid endpoint of a pay range. [2] Classification progression series: A classification grouping whereby the class specifications or position standards specifically identify entry, developmental and objective levels within the series. A common misunderstanding is thinking that all classification series with multiple levels are a progression series. The classification specification must be consulted to determine whether a particular level or series is considered a progression series. *See s. ER 1.02(32), Wis. Adm. Code; related to "career ladder" and "grid point."*

Progression series: A multiple-level classification series where employees are expected to progress via reclassification to the objective level as long as they can satisfactorily perform the full range of duties assigned to the objective level classification. The class specifications or position standards specifically identify the entry and "full-performance objective level." The full performance objective level within a progression series means the classification level which any employee could reasonably be expected to achieve with satisfactory performance of increasingly complex duties or the attainment of specified training, education, or experience. Refer to definitions of entry level, developmental level, and objective level.

Project: A coordinated set of analytic activities aimed at reaching a conclusion, recommendation or decision on a specific question, problem, or issue. Projects do not continue indefinitely, but are expected to end in the foreseeable future when the conclusion, etc., is reached. A project differs from a program in that it has narrower scope, is situational in focus, and is temporary in duration.

Project appointment: "The appointment of a person to a project position under conditions of employment which do not provide for attainment of permanent status." *See s. 230.27, Wis. Stats.; ER 1.02(25), Wis. Adm. Code*.

Project employee: "Employment as a result of a project appointment in a project position." *See s. ER 1.02(26), Wis. Adm. Code*.

Project employment: Employment as a result of a project appointment to a project position. s. ER-MRS 1.02(26), Wis. Adm. Code.

Project position: "A position which is normally funded for 6 or more consecutive months and which requires employment for 600 hours or more per 26 consecutive bi-weekly pay periods, either for a temporary workload increase or for a planned undertaking which is not a regular function of the employing agency and which has an established probable date of termination. No project position may exist for more than 4 years." *See s. 230.27(1), Wis. Stats.*

Promotion: "Except as provided in *ER-MRS 14.02, Wis. Adm. Code*, 'promotion' means any of the following: (a) The permanent appointment of an employee to a different position in a higher class than the highest position currently held in which the employee has permanent status in class; (b) The permanent appointment of an employee or former employee in layoff status to a different position in a higher class than the highest position in which permanent status in class was held at the time the employee or former employee became subject to layoff; or (c) the permanent appointment of an employee on an approved leave of absence, either statutorily mandated or granted by an appointing authority, to a different position in a higher class than the highest position in which permanent status in class was held at the time the employee began the leave of absence." *See s. 230.19, Wis. Stats.; s. ER 1.02(36) and s. ER-MRS 1.02(27), Wis. Adm. Code; related to "competition."*

Promotional competition: Only applicants in the classified civil service who occupy a permanent classified, seasonal or sessional position in which permanent status may be obtained; who are on an approved leave of absence; who are former employees with restoration rights resulting from layoff; or who have previously gained permanent status and are temporarily serving in a project position under a project appointment may compete. Promotional competition may be open to all eligible employees within the classified civil service (*servicewide*), or, if certain conditions are met, to eligible employees within the UW System (*systemwide*), an agency (*agency*), or recognized employing unit (*unit*). (Promotional competition was eliminated as a recruitment option with 2015 Wisconsin Act 150.)

Promotional increase: An increase in a salary or wage rate that accrues to a person because of a promotion to a higher-level job.

Promotional opportunity: A competitive opportunity announced only to current classified employees in Wisconsin state civil service (including seasonal employees,

employees on layoff, employees in approved leaves of absence and employees on probation) who are not serving on a limited term or project employment basis. (Promotional opportunities were eliminated as a recruitment option with 2015 Wisconsin Act 150.)

Protected group or class: Any group or member of that group or class specified in and protected by federal or state anti-discrimination laws (Title VII, other civil Rights Act and state FEBs).

Protective occupations: Those occupations whose principal duties involve assuring the public's safety and which subject the individual filling the position to periods of great mental and physical stress, require the individual to be present under very dangerous situations, and require the individual to carry out his/her duties regardless of the risk involved. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Protective Occupation Participant: (a) Any participant included within the provisions of the Wisconsin Retirement System who occupies a job title specifically identified in s. 40.02(48)(am), Wis. Stats., as being a protective occupation (or is allocated to a classification title determined by DPM to be equivalent) and whose name is certified to the Public Employee Trust Fund as a protective occupation participant; or, (b) Any participant included within the provisions of the Wisconsin Retirement System whose principal duties are determined by DPM to involve active law enforcement or active fire suppression or prevention, provided the duties require frequent exposure to a high degree of danger or peril and require a high degree of physical conditioning, and whose name is certified to the Public Employee Trust Fund as a protective occupation participant. S*ee ss. 40.02(48)(a) and (am), Wis. Stats. and WHRH Ch. 680, Protective Occupation Status for State Employees.*

Protective occupation participant status (POPS): A category of retirement participation under the Wisconsin retirement system that covers individuals whose principal duties are to involve active law enforcement or active fire suppression or prevention, provided the duties require frequent exposure to a high degree of danger or peril and also require a high degree of physical conditioning, or who are specifically included in this category in the statutes. *See s. 40.02(48), Wis. Stats.; contrast with "hazardous employment" and "worker's compensation."*

Protective retirement category: An employment category within the WRS for employees who have served in a qualifying protective occupation position (i.e., Correctional Officer).

Public Agency: The government of the United States; the government of a State or political subdivision thereof; any agency of the United States, a State, or a political subdivision of a State, or any interstate governmental agency. The public agency definition does not extend to private companies that are engaged in work activities normally performed by public employees.

Public Safety: Protection from danger, risk, or injury, as well as the responsibility to enforce public good. *See WHRH Ch. 680, Protective Occupation Status for State Employees.*

Public Safety Employees: Any individual under s. 40.02(48) (am) 7. or 8., Wis. Stats. *See s. 111.81(15r), Wis. Stats.; Related to "Wisconsin Law Enforcement Association - WLEA"*

Pyramiding: The payment of multiple supplemental pay amounts for the same hours worked, e.g., payment of both night differential and responsibility pay to an employee who meets the eligibility requirements for both. *Similar to "add-on pay," "differential pay," "night differential," "on-call pay," "premium rate," "shift differential," "standby pay," "supplemental pay", and "weekend differential."*

Q Q Q

Quantitative job evaluation: A method that creates a job worth hierarchy by analyzing jobs in terms of specific factors and numerical indices. Examples of quantitative methods are job component and point factor. *Contrast with "nonquantitative job evaluation"; similar to "job component" and "job content evaluation method."*

Quid Pro Quo sexual harassment: (1) making submission to sexual demands an implicit or explicit term or condition of employment; (2) making decisions affecting someone's employment or compensation on the basis of whether the person submits to or rejects sexual demands.

R R R

Random Rank: A program that, for certain classifications, there is no assessment administered. Interested persons submit applications and are assigned a random rank. The register may periodically be re-ranked.

Raised Minimum Rate (RMR): A dollar amount greater than the established pay range minimum that becomes the minimum rate payable to any employee whose position is assigned to the class or class and subtitle and, if applicable, in the specified geographic area where the raised hiring minimum is in effect. This concept is different from a Hiring Above the Minimum rate in that the raising of the minimum rate is required to attract employees who meet the typical, not advanced or exceptional, requirements of the position. It is class and/or geographically based and not related to attributes or qualifications of an individual applicant. RMRs are applicable to current state employees and new hires. *See Comp. Plan, Sec. E 1.02; WHRH Ch. 528; contrast with "Hiring Above the Minimum" and "hiring rate."*

Range: (1) For a set of data, the difference between the maximum value and the minimum value. (2) For a pay grade, the percentage by which the maximum pay exceeds the minimum. Sometimes referred to as the range spread. *Contrast with "interrange differential," "pay range overlap," and "standard deviation;" same as "pay range spread," "pay range width" and "range spread."*

Range penetration: The level of an individual's pay compared to the total pay range (rather than compared with midpoint, as in compa-ratio). Range penetration is calculated as: RP=(pay—Range Minimum)/(Range Maximum—Range Minimum).

Range spread: The width or spread of a pay range, measured by the ratio: Width=(maximum pay—minimum pay)/minimum pay. *Contrast with "interrange differential" and "pay range overlap"; same as "pay range width."*

Rank: An indicator of a person's standing on a register according to their civil service score and tie breaker, if necessary.

Ranking method of job evaluation: The simplest form of job evaluation. A whole-job, job-to-job comparison, resulting in an ordering of jobs into a job worth hierarchy from highest to lowest. *Similar to "job worth hierarchy."*

Ratification: Formal approval of a newly negotiated agreement by vote of the organization members who are affected.

Rating bias: Any of a number of common nonperformance-related errors made by raters due to poor information-processing capabilities rather than ethnic or sexual prejudice. The use of explicit performance standards and the training of raters has been shown to reduce rating bias. *Contrast with "reliability;" related to "halo effect."*

Raw Score: The total number of points achieved by the applicant on a civil service assessment. For assessments with rating panels, may be an average or total of raw scores assigned by individual raters. The unadjusted score on a test, often determined by counting the number of correct answers, but more generally a sum or other combination of item or question scores. This score is translated into a civil service score.

Reactivate Register: After a register has expired (past expiration date), it may be reactivated to make it available for additional certifications.

Reallocation: The assignment of a position to a different class, based on a change in the concept of the class or series; the creation of new classes; the abolishment of existing classes; a change in the pay range of the class; the correction of an error in the previous assignment of a position; a logical change in the duties and responsibilities of a position; or a permanent change in the level of accountability of a

position such as that resulting from a reorganization. Reallocation is the transaction used to implement classification survey activities. *See s. 230.09(2), Wis. Stats.; ss. ER 1.02(38) and 3.01(2), Wis. Adm. Code; WHRH Ch. 370; contrast with "allocation"; related to "logical," "reclassification", "regrade;" and "upgrading."*

Reasonable accommodation: Alternatives, adjustments, or changes in the job, the workplace, assessment or examination, and/or term or condition of employment which will enable an otherwise qualified handicapped individual to perform a particular job successfully, as determined on a case-by-case basis, depending on the individual's circumstances.

Reasonable offer: An offer of appointment that "meets the following 5 conditions as of the date of the offer:
(a) The position is one which the employee would be qualified to perform after customary orientation provided to new workers in the position; (b) the position is the highest level position available within the agency to which the employee could either transfer or demote; (c) the number of work hours required does not vary substantially from the number of work hours previously worked; and (d) the position is located at a work site that is within reasonable proximity of the original work site; (e) the pay range of the position offered is no more than 3 pay ranges or counterpart pay ranges lower than the pay range of the position from which the employee was laid off."
s. ER-MRS 22.09(2), Wis. Adm. Code

Recipient: (Unless defined differently under the applicable collective bargaining agreement) Any person meeting the eligibility requirements under s. ER 18.15(2), Wis. Adm. Code or as defined in the applicable collective bargaining agreement. To be an eligible recipient, an employee must satisfy several conditions, unless defined differently under the applicable collective bargaining agreement. *See s. ER 18.15(1)(e), Wis. Adm. Code, and WHRH Ch. 660, section 050.*

Reciprocal conversion: A formula which converts raw scores on one scale to a civil service scale score of 70 or more, using a 30-point-passing spread (i.e., 70 - 100).

Reclassification: The assignment of a filled position to a different class based upon logical and gradual change to the duties or responsibilities of a position or the attainment of specified education or experience by the incumbent such that the duties performed are better described by a new classification title. Reclassification can result in upward and lateral, as well as downward movement for the position. *See s. 230.09(2), Wis. Stats.; ss. ER 1.02(39) and 3.01(3), Wis. Adm. Code; WHRH Chs. 370 and 380; contrast with "allocation;" related to "gradual," "logical," "reallocation," "regrade," and "upgrading."*

Recorder (or Note-taker): Takes minutes of the meeting. From WERC consensus training.

Recruitment Activity Plan (RAP): A form used to communicate and document the recruitment activities used by an agency for a specific title. (Following implementation of 2015 Wisconsin Act 150, the RAP is no longer required.)

Recruitment option: A grouping of job duties and responsibilities common to one or more positions assigned to a classification or classifications, used by the administrator to establish layoff groups, selectively certify eligible applicants or establish registers. *See WHRH Ch. 232, section 070.*

Red circle pay rate: "A base pay rate received by an employee which is above the pay range maximum for the classification of the employee's position." The employee is usually not eligible for further base pay increases until the range maximum surpasses the individual's pay rate. *See ss. ER 29.01(3) and ER 29.025, Wis. Adm. Code.*

Red flu: A method used by fire fighters instead of a strike, in which fire fighters call in sick en masse. The same tactic is used by other employees such as police officers (blue flu) and nurses (white flu). *Similar to "blue flu," "boycott," "collective bargaining," "concerted activity," "job action," "picketing," "sitdown strike," "slowdown," "strike," "sympathy strike," and "white flu."*

Reduced leave schedule: A leave schedule that reduces an employe's usual number of working hours per workweek, or hours per workday. A reduced leave schedule is a change in the employes' schedule for a period of time, normally from full-time to part-time. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Refugee: "Any person who is outside of his or her country of nationality who is unable or unwilling to return to that country because of persecution or a well-founded fear of persecution. Persecution or the fear thereof must be based on the alien's race, religion, nationality, membership in a particular social group, or political opinion. People with no nationality must generally be outside their country of last habitual residence to qualify as a refugee. Refugees . . . are eligible to adjust to lawful permanent resident status after one year of continuous presence in the United States."

Register: A list of names and scores of those individuals who have taken an assessment and received a passing score or met the minimum eligibility requirements and are eligible for certification. For traditional recruitments, a register contains civil service score and rank; for pass/fail assessments the civil service score will normally default to 70.

Registrant: A person who is on an employment register. A person must have passed the assessment to be a registrant.

Regrade: The determination that the incumbent of a filled position which has been reallocated or reclassified should remain in the position without opening the position to competition. *See s. 230.09(2)(d), Wis. Stats.; ss. ER 1.02(40) and 3.015, Wis. Adm. Code; Comp. Plan, Sec. A 3.00; WHRH Ch. 370; contrast with "allocation;" related to "gradual," "logical," "reallocation," "reclassification," and "upgrading."*

Regression-based modeling method: A method of job evaluation that statistically develops a model using multiple regression analysis to identify factors and factor weights for job content that best explain the relative market pay level of benchmark jobs. Jobs for which no market data is available are then evaluated using the model. When a model is built using internal pay rates to test evaluation consistency, it is known as "policy capturing." Also known as job component method. *Related to "mode," "model," and "pay trend line."*

Regular rate: The average hourly rate actually paid the employee as straight time pay for all hours worked in the workweek or work period, including all remuneration for employment paid to, or on behalf of, the employee, except any payments specifically excluded from the calculation of the regular rate under the Fair Labor Standards Act and related federal regulations. *See Comp. Plan, Sec. A 4.01(9);WHRH Chap. 520; related to "Across the board increase," "base pay rate," and "wage rate."*

Rehabilitation Act of 1973: A federal act which mandates that federal fund recipients not exclude or discriminate against any "otherwise qualified handicapped individual" in "any program or activity receiving federal financial assistance." The Act defines a handicap as a physical or mental impairment which substantially limits one or more of a person's major life functions, including work.

Rehired annuitant: A WRS annuitant who is hired by the State of Wisconsin at some point after becoming an annuitant.

Reinstatement: Under state civil service law and code, reinstatement is the permissive reappointment without competition of an employee or former employee to a position that is in the same class in which the person was previously employed, or to another classification to which the person would have been eligible to transfer if there hadn't been a break in their employment, or to a class having a lower pay rate or pay range maximum for which the person is qualified to perform the work after receiving customary orientation that is provided to newly hired workers in the position. There must have been no misbehavior or misconduct in the former position from which reinstatement eligibility is derived.*See s. 230.31, Wis. Stats.; s. ER 1.02(41) and s. ER-MRS 1.02(29); contrast with "restoration;" related to "competition."*

Related Register: Use of an existing register that was created for the same or related classification which requires the same or significantly similar knowledge, skills and abilities as the vacancy being filled. Inter-agency related-register requests must be approved by BMRS.

Reliability: The extent to which the assessment device or instrument produces a consistent, trustworthy, dependable result. May be operationalized in a variety of ways including correlating measures from two or more separate observations using the same measures on the same subjects. **In assessment development**: Statistical reliability refers to measurements that can be repeated with time. For example, an assessment is said to be reliable if applicants' scores would be the same in repeated administrations under the same conditions. Reliability is necessary, but not sufficient, to produce validity and may be calculated in a variety of ways including rater reliability or agreement coefficients or coefficient Alpha. Inter-rater reliability or question reliability can be obtained through WiscJobs, depending on how the assessment structure is set up.
Contrast with "halo effect" and "rating bias;" similar to "validity."

Reliability Type: Defaults to coefficient alpha. Users calculating other types of reliability may enter the results directly into the reliability field and identify the applicable type in this field.

Removing a Registrant: Chapters ER-MRS 6.10 and ER-MRS 11.04 both identify reasons for which an applicant must/can be removed from a register, dependent on the situation.

Repeated violation: Where the employer has previously violated the minimum wage or overtime requirements of the FLSA, provided the employer has previously received authoritative notice that the employer allegedly was in violation of the provisions of the FLSA.

Reports of Action (ROA): Identification of the results of certification of individual registrants that are entered at the Cert Summary Edit page, i.e., the response from a certified candidate regarding his/her interest in the position for which they were certified or the action taken by the appointing authority. Examples of ROAs are: not interested (NI), failed to respond (FR); unable to locate (UL); not available (NA); not eligible (NE); not selected (NS); declined offer (DO); selected (SE); failed to show (FS); not contacted (NC). If additional names are needed, replacement names can be provided for all but SE, NC, and NS.

Representative position: Positions identified at the time the classification specification is written to use as an example of the definition in the specification for different classification levels, for example, to provide examples of the size of a small, medium, or large program; simple, complex, very complex program; etc. A "representative position" may logically and gradually change over time to be more appropriately classified in a different classification or level. *Related to "allocation pattern," "classification specification" and "job specifications."*

Represented position: A position in a classification which is identified in a certified bargaining unit. Some bargaining units have "fair share" while others do not; an

employee is represented regardless if they are specifically a dues paying member of a bargaining unit. The contract explains the rights of the individual represented employee. Limited Term and Project 05 employees are not represented even if they are in a classification which is identified in a certified bargaining unit. *See s. 111.825, Wis. Stats. and collective bargaining agreements; contrast with "confidential" and "nonrepresented."*

Rescinding a Certification: Cancelled for administrative reasons (e.g. not in budget, duties changed due to reorganization, etc.).

Research: The process of defining a set of measurable variables, establishing their level, and specifying their interrelationships, for the purpose of understanding or explaining a particular phenomenon or predicting future states of affairs.

Resignation: "(a) The date the employee designates in his or her letter of resignation; (b) The date the resignation letter is filed with the appointing authority if no date is supplied in the resignation letter; (c) The date established by mutual written agreement between the employee and the appointing authority if different from pr. (a) or (b); or (d) The end of the last date in work status in the case of an abandonment which is treated as a resignation." *See s. ER 21, Wis. Adm. Code*.

Respondent: The agency attorney and assisting staff responsible for defending the personnel transaction appealed to the Wisconsin Employment Relations Commission. *See ss. 230.44 and 230.45, Wis. Stats.*

Responsibility: (1) Denoting the type of work, such as "responsible work". (2) The employee's relation to the work, such as "Employee is responsible for . . . ." Both denote the employee's accountability or liability to the program. When responsible is used as in (1), without adverbs, it denotes work at the full operating level. The next level of accountability is very responsible; the final level, highly responsible. Complete Responsibility–individual has complete authority to take whatever action he or she deems advisable or necessary, subject only to the policies or general rules laid down by his or her immediate supervisor. Delegated Responsibility–individual has the authority to take whatever action he or she deems advisable or necessary; he or she may initiate and carry out the action but is required to advise his or her superiors of the action taken when deemed necessary. Must inform superiors of non-routine situations. *Related to "highly" and "very."*

Responsibility pay: Supplemental pay paid to employees for work performed between specified hours where direct supervision is reduced. *Similar to "add-on pay," "differential pay," "night differential," "on-call pay," "premium rate," "shift differential," "supplemental pay," and "weekend differential."*

Restoration: Under state civil service law and code, restoration is the mandatory reappointment without competition, of an employee or former employee to a position that is in the same class in which the person was previously employed, or to another

classification to which the person would have been eligible to transfer to if there hadn't been a break in their employment, or to a class having a lower pay rate or pay range maximum for which the person is qualified to perform the work after receiving customary orientation that is provided to newly hired workers in the position.If the classification upon which restoration rights are based is no longer in existence, restoration rights are to the classification to which the position from which the employee derives restoration rights is presently allocated. *See ss. 230.31 and 230.32, Wis. Stats, s. ER 1.02(42) and s. ER-MRS 1.02(30).; contrast with "reinstatement."*

Retaliation: (1) Any action taken by an employer in order to adversely affect the employee's conditions of employment, when such action is taken because of the employee's exercise of rights under the Wisconsin Administrative Code or collective bargaining agreement, or (2) Title VII prohibits discrimination against individuals because they have filed a Title VII charge, have participated in a Title VII investigation, or have other wise opposed Title VII discrimination. *See ss. 230.80(8) and 230.83, Wis. Stats.; s. ER 46.02(8), Wis. Adm. Code.*

Retest Waiting Period: The amount of time that an applicant must wait before he/she can re-take an assessment. The timeframe will be three months to three years for cognitive exams and zero days to three years for non-cognitive assessments. The default is six months.

Retired employee: For the purposes of ASLCC and SHICC, a "retired employee" is defined as a former insured employee who is not a participating WRS employee; and who (a) retired on an immediate or disability (including duty disability) annuity; (b) received a lump sum payment, which would have been an immediate annuity if paid as an annuity; or (c) is an eligible employee under s. 40.02 (25)(b)(6), (6e), or (6g), Wis. Stats. (This statute covers an employee who terminates state employment with 20 years or more of WRS creditable service and remains an inactive participant in the WRS.)

Reuse of Score: If an assessment is re-administered within the defined reuse time period, an applicant who is on the register may request that their score be reused when the register is integrated. Registrant subsequently receives a new grade notice with their new rank on the register.

Reuse Time Period: The period of time within which an applicant may reuse their score. The time period can be set anywhere from three months to three years. The default is six months.

Right-to-work laws: State laws which forbid collective bargaining agreements to contain union security clauses which call for compulsory union membership.

Ripple effect: The impact of a negotiated wage increase or other economic benefit upon the expectations of other employees, non-represented and represented, who are

not covered by the negotiated collective bargaining agreement but who work for the same employer.

Rollup Method Type: Determines how the calculated values are determined. Normally, higher level scoring criteria are determined by summing (totaling) the scoring criteria at the lower level(s).

Routine: Work of repetitive nature, a customary procedure without deviation from the established norm. This does not necessarily denote simple work.

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Sabbatical leave: Annual leave which was deferred during the year earned to be used in a subsequent year to extend the annual leave, unless used for termination leave. *See WHRH Ch. 704*

Salaried employee: Refers to compensation paid by the week, month, or year rather than by the hour. Generally applies to higher-level jobs that are exempt from the provisions of the Fair Labor Standards Act of 1938 (FLSA). *See Comp. Plan, Sec. A 4.02(3); similar to "exempt;" contrast with "nonexempt;" related to "Fair Labor Standards Act."*

Salary Basis Test: An employee must regularly receive each pay period a predetermined amount constituting all or part of the employee's compensation. Such amount may not be subject to reduction due to variations in the quality or quantity of the work, or because of the actual number of days or hours worked, as long as the employee is ready, willing and able to perform work.

Salary budget: An amount or pool of money allocated for payment of salaries during a specified period. Salary budgets must be taken into account when planning structure adjustments or individual employee adjustments.

Salary increase cost: (1) The cost of the increase in the current (i.e., first) year is determined by multiplying the eligible payroll by the average increase percent and the participant rate, adjusted for the percent of the year the increase is in effect. (2) The annualized cost of the increase (future year cost) is determined by multiplying the eligible payroll by the average increase percent and the participant rate.

Salary structure: The hierarchy of job grades and pay ranges established within an organization. The salary structure may be expressed in terms of job grades, job-evaluation points, or policy lines. *Similar to "pay plan."*

Sample: In statistics, a subset of the elementary units of the (subject) population. "Random" samples are drawn from a population in which every possible

sample of that size has an equal chance of being selected. "Convenience" samples are drawn from a population based on convenience. Even though the goal is the same as in random sampling (i.e., to represent a population) most salary surveys are convenience samples.

Scab: A worker who refuses to go out on strike with his or her co-workers or a worker who is hired to replace a striking worker.

Scattergram: A mathematical technique of displaying a "picture" of a relationship between two variables by plotting (x,y) points. Also called a scatterplot. *Related to "pay trend line;" similar to "job cluster."*

Scope: A quantifiable job characteristic that ascribes value to a job. The range (number and variety) of job responsibilities. Scope is most often measured by depth and breadth. Scope is frequently influenced by or interacts with complexity. *Related to "accountability," "breadth," "complexity," "depth," "discretion, "impact of work," "Knowledge, Skills, and Abilities," "point factor system," and "survey."*

Score range: A rough measure of spread or dispersion in scores, generally obtained by subtracting the lowest observed score from the highest observed score.

Scoring Criteria: The numerical values associated with assessment items and parts. These criteria will be applied to applicants' responses or scores to determine their assessment results. Examples of scoring criteria include weight, maximum, cap, passing point, etc.

Seasonal Activity: Work during periods of significantly increased demand, which are of a regular and recurring nature. In order for the activity to be considered seasonal, the projected compensatory time due to overtime hours worked by the affected employee during the period of significantly increased demand must be likely to result in the accumulation of more than 240 hours of compensatory time off credits.

Seasonal employment: Employment which normally permits attainment of permanent status in class through successive reinstatements and requires the services of an employee on an intermittent and recurring basis for at least 600 hours each year, during no more than 24 biweekly payroll periods of any 26 consecutive full biweekly payroll periods. *See s. ER 1.02(44) and s. ER-MRS 1.02(31), Wis. Adm. Code.*

Secondary source of job information: In job analysis, any source of job information other than an audit of the job, incumbent, or immediate supervisor.

Section chief: Bureaus may be divided into subunits which shall be known as "sections" and which shall be headed by "chiefs". *See s. 15.02(3)(c)(3), Wis. Stats.; same as "chief."*

Segregated fund (SEG): Revenues which, by law, are deposited into funds other than the general fund and are available for the purposes for which such funds are created. *See s. 20.001(2)(d), Wis. Stats.; contrast with "general purpose revenue" and "program revenue."*

Selected (SE): A report of action on a certification when the individual was offered the position and accepted.

Selective Service Registration: The process of providing the Selective Service System with personal information, such as name, address, date of birth, Social Security Account Number and other related information. Men are required to register with Selective Service as soon as they reach age 18.

Selective Service System: An independent agency within the Executive Branch of the Federal Government. The Director of Selective Service is appointed by the President and confirmed by the Senate. Selective Service is not a part of the Department of Defense. The Federal law under which the agency operates is the Military Selective Service Act. Under this law, the mission of the Selective Service System is to provide the numbers of men needed by the Armed Forces, within the time required, should Congress and the President decide to return to a draft, in the event of a national emergency.

Semi-automatic wage progression: Systematic wage increase after specified periods of service with satisfactory performance, until the employee reaches a specified structure maximum.

Senior manager pay system: All classifications in Pay Band, 81-01 are included in the "senior manager pay system." The term should be used in reference to a pay system, schedule 81-01. *Related to "career executive classification," "career executive position" and "career executive program."*

Seniority: The term used in most collective bargaining agreements to refer to an employee's tenure with the state in a permanent position. It generally has the same meaning as "continuous service," but must be determined in accordance with the provisions of an applicable collective bargaining agreement, rather than the administrative rules.

Seniority based grid: A grid structure that establishes an employee's position on the grid by adjusting the employee's base hourly rate using the grid point that equates with the employee's full years of seniority, as of a specified date. *Contrast with "pay-based grid;" related to "grid point," "grid rate," "grid seniority," and "longevity pay."*

Series: A group of related classes where work assignments involve a common field of activity but there exists a difference in the complexity of duties and levels of

responsibility. Most frequently, classes in a series will use the same title, but with ascending suffix numbers or names, such as entry, journey, etc.

Serious health condition: See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.

Servicewide: An area of recruitment or certification including only current permanent classified employees in Wisconsin state civil service (including seasonal, sessional employees and employees on probation) who are not serving a limited term or project appointment basis. (With the implementation of 2015 Wisconsin Act 150, servicewide recruitments and certification were eliminated.)

Sessional employment: "Employment in positions of legislative agencies that require the services of an employee more than 600 hours in any 26 consecutive full biweekly payroll periods and which normally permits attainment of permanent status in class through successive reinstatements, but the duration of which is closely related to the legislative session." *See s. ER 21.02(45) and s. ER-MRS 1.02(32), Wis. Adm. Code.*

Shift differential: Supplemental pay provided to employees who work during specified hours that are considered non-standard, i.e., nights or weekends. *Similar to "add-on pay," "differential pay," "night differential," "on-call pay," "premium rate," "pyramiding," "supplemental pay," and "weekend differential."*

Sick leave: Paid time off earned by employees to cover absences due to illness or nonoccupational injury. *Related to "employee benefits," "fringe benefits" and "inside payroll costs;" similar to "holidays," "noncontributory benefit plan," "pay for time not worked," "time off with pay" and "Travel Schedule Amounts."*

Significant job duties: Job duties which constitute more than 25 percent of the position description. *See WHRH Ch. 370; contrast with "majority of time."*

Simulation: Applicants perform actual job tasks under standardized conditions (controlled environment, special center).

Sit-down strike: An illegal work stoppage during which employees remain at their place of work and refuse to leave the employer's premises. *Related to "blue flu," "boycott," "collective bargaining," "concerted activity," "job action," "red flu," "slowdown," "strike," "sympathy strike," and "white flu."*

Skill-based pay: A person-based compensation system based on the repertoire of skills an employee can perform rather than the specific skill that the employee may be doing at a particular time. Pay increases generally are associated with the addition and/or improvement of the skills of an individual employee, as opposed to better performance or seniority within the system. Pay level generally is not dependent on whether any of the skills are utilized.

Slotting: The act of placing a job into a job worth hierarchy established by some other job evaluation method. The method involves comparing the job to one or more jobs in an already established hierarchy; consequently, it cannot be used as a stand-alone method. *Related to "job cluster" and "job worth hierarchy."*

Slowdown: A deliberate reduction of output by employees in order to bring economic pressure upon the employer without incurring the cost of a strike. *Similar to "blue flu," "boycott," "collective bargaining," "concerted activity," "job action," "picketing," "red flu," "strike," and "white flu."*

Small Department: A department with between 51 and 99 positions. *Related to "large department," "major department," "medium department, and "very small department."*

Special Accommodation: Adjustments to the selection process to accommodate persons with disabilities (e.g., provide a reader for a blind applicant; extra time for an applicant with learning disabilities, etc.).

Specialist: For the purposes of DPM's *Wisconsin Human Resources Handbook*, "specialist" refers to a human resources professional who is knowledgeable in the area of recruitment and selection. This does not specifically relate to an individual's classification.

Speed-up: The attempt by an employer to increase productivity without a corresponding increase in wages.

Spouse: A husband or wife as defined or recognized under Wisconsin law for purposes of marriage.

Staff: Generally (1) referring to the functions which exist as a result of creating an organization, considered advisory or service functions; such as in an engineering bureau, providing pay for employees is a staff function, or (2) the subordinates within an organizational group. *Contrast with "line."*

Standard basis of employment: Generally 40 hours each 7 consecutive calendar day-period, except that when the needs of an employing unit cannot be fulfilled by adhering to the standard basis of employment, additional hours of work may be required by the appointing authority. (b) The standard basis of employment is generally divided into 5 work days of 8 hours each. *See s. 230.35(5)(a) & (b), Wis. Stats.*

Standard deviation: The square root of the average squared difference between data points and the mean. Standard deviation is a measure of variability which indicates an average relative distance between each data point and the mean. The larger the standard deviation, the more the data is spread out from the mean. Mathematically it is the square root of the variance. **In assessment development:** The standard

deviation is a measurement used to characterize the dispersion of scores within the applicant pool. Numerically, the standard deviation is the square root of the variance. Unlike the variance, which is a somewhat abstract measure of variability, the standard deviation can be readily conceptualized as a distance along the scale of measurement. *Contrast with "interrange differential," "pay range overlap", and "range."*

Standard error of measurement (SEM): An indicator of the amount of error in a particular individual's obtained score; the difference between an obtained score on an assessment and the "true score;" used to raise or lower passing points and set score bands.

Standard workweek: A regularly recurring period of 168 hours in the form of seven consecutive 24-hour periods. For most employees, the workweek begins on Sunday and ends at midnight of the following Saturday. *See s. 230.35, Wis. Stats.; Comp. Plan, Sec. A 4.01(11); contrast with "alternative work schedule," "flextime," and "nonstandard work period."*

Standardize: Indicates that raw scores for this part will be standardized. The standardized scores is an indicator of how far and in what direction the score deviates from the mean, expressed in units of the standard deviation. If means and standard deviations are entered into the "planned" column (e.g., derived from a previous administration of the assessment), the system will use those values to generate standardized scores. If nothing is entered into the planned column, the system will use the means and standard deviations calculated through the assessment scoring procedures for that assessment.

Standards: Means for evaluating Options. From WERC consensus training.

Standby pay: Supplemental pay to compensate for a specified period of time during which the appointing authority requires that an employee be available for work and be able to report to work in less than one hour. *See Comp. Plan, Sec. A 4.09; similar to "add-on pay," "differential pay," "on-call pay," "night differential," "premium rate," "pyramiding," "supplemental pay" and "weekend pay."*

State Employee: A person who currently holds a classified civil service position in Wisconsin State Government.

State Engineering Association - SEA: The bargaining unit name for architect, engineer and related employees in Bargaining Unit designation 14.

State Public Defender Association - SPDA: The bargaining unit name for Assistant State Public Defenders under Bargaining Unit designation 21.

Statewide: Denotes that the scope and impact of a particular function or program area transcends district and/or agency boundaries. An employee who performs duties

and provides services for clients on a "statewide basis," then provides the same services for all of the program's clients regardless of their geographic location. *Related to "complexity," "impact of work" and "scope."*

Statutory benefits: Government required/legally mandated benefits, most notably social security, are included in this category. Social security typically includes provisions for retirement, spousal coverage, disability, workers and medical benefits. *Related to "employee benefits" and "fringe benefits."*

Step: (1) A specific amount, called a within range pay adjustment (step), which is indicated on a pay schedule for each pay range; or (2) the distance between two levels on a pay grid; or 3) "A level of management authority where a grievance may be pursued." *See s. ER 46(9), Wis. Adm. Code; different pay schedules; similar to "within range pay step."*

Step rates: Standard progression pay rates that are established within a pay range. Step rates usually are a function of time in grade and are often referred to as automatic. However, they also can be variable or can be used in conjunction with merit programs.

Steward: The union representative of a group of fellow employees who carries out duties of the union within the operation.

Stipend: A fixed amount intended to be used for those incidental expenses that are not reimbursable as direct expenses of moving household goods.

Stratification adjustment: A one-time wage adjustment that is provided to move an employee's pay through the pay range. The adjustment may take many forms, e.g., a specified cents per hour, a portion of a Within-Range Pay Step or grid step.

Strike: Stopping work for the purpose of gaining concessions from the employer. *Similar to "blue flu," "boycott," "collective bargaining," "concerted activity," " job action," "picketing," "red flu," "sitdown strike," "slowdown," "sympathy strike" and "white flu."*

Structure adjustment: A pay increase required to bring an employee's pay up to the respective minimum amount. A structure adjustment may be required for certain employees when the pay range minimum and/or PSICM amounts are increased by an amount greater than any pay increase provided to the employee on that same date, or if those same employees do not receive an increase because of ineligibility. The collective bargaining agreement or the Compensation Plan will indicate the sequence of pay adjustments with the same effective date. *See s. 230.12, Wis. Stats.; s. ER 29.04, Wis. Adm. Code*

Subcontracting: A procedure to sublet certain parts of an employer's operation to subcontractors rather than have the company's employees perform the work;

frequently on the grounds that the work can be performed more efficiently and with less expense.

Subdivision: A recognized work unit that has a continuing function. A fixed location and continuity of personnel are both helpful but not absolutely essential in establishing the existence of a subdivision.

Subject matter expert (SME): An individual who knows the critical aspects of the job. This is often the supervisor of the position to be filled, faculty or technical school instructors, or people with similar positions in other organizations or organizational units. Person qualified to identify the job content that should serve as a basis for assessment development. SMEs have first-hand knowledge of the requirements for successful job performance.

Subordinate: Any person holding a subordinate position subject to appointment, removal, promotion or reduction by an appointing officer. *See ss. 111.81(7) and 230.08(3), Wis. Stats.; same as "employee" and "incumbent."*

Substantial Relationship: Information having a considerable connection to or association with the duties and responsibilities of the position.

Subtest: One of several test parts or components or assessment instruments used in combination.

Subtitle: A secondary explanatory title which is used to identify positions whose duties distinguish them from other positions in the same class in terms of the qualifications required for successful performance in the position. An "unofficial subtitle" has no effect on personnel transactions, but is used by agencies to easily identify positions that may be different from most positions in the classification. Designation of an "official" subtitle is subject to the approval of the administrator of DPM and does impact personnel transactions. Personnel processes such as layoff may be based on both the class title and subtitle. *See WHRH Ch. 232, section 070; see s. ER 2.03(1) & (2) Wis. Adm. Code; similar to "classification/official class subtitle."*

Successive hurdles: A method of assessment whereby an applicant must pass or meet some predetermined standard on a given component of a multiple-component assessment before he or she may compete in the next component of the assessment.

Supervisor/Supervisory: "Any individual whose principal work is different from that of the individual's subordinates and who has authority, in the interest of the employer, to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward or discipline employees, or to adjust their grievances, or to authoritatively recommend such action, if the individual's exercise of such authority is not of a merely routine or clerical nature, but requires the use of independent judgment." Usually, supervisors will be required to supervise the work of three or

more permanent, full-time equivalent, classified employees in order to be credited with supervisory duties because the amount of time required for supervisory duties can usually justified by the supervision of at least three employees. Supervising fewer than three employees may not meet the Wisconsin Employment Relations Commission's *de minimus* test for supervisory duties. Past WERC decisions and the DOL regulations state that supervisors cannot "share" supervision of employees. *See s. 111.81(19), Wis. Stats.; WHRH Chs. 324 and 370; similar to "nonrepresented" and "unit supervisor."*

Supplemental health insurance premium credits (SHICC): Credits that are granted to an employee for the sole purpose of payment of health insurance premiums after ASLCC are exhausted. *See Wisconsin Human Resources Handbook Chapter 758.*

Supplemental pay: An hourly amount paid in addition to the base pay in recognition of factors or conditions not reflected in the basic pay range or pay rate of a position. *See Comp. Plan, Sec. A 4.01(12); similar to "add-on pay," "differential pay," "night differential," "on-call pay," "premium rate," "pyramiding," "shift differential," "standby pay" and "weekend differential."*

Supplementing a Certification: After initial certification & refreshing of certification, may certify additional names by expanding or changing certification criteria (e.g., dropping special qualification) or adding names from another register. Used when the number of interested and available candidates is less than the number originally requested. Replacement names may be certified upon entering the appropriate reports of action or when certifying from a related register

Support work: Support work involves proficiency in one or more functional areas in certain limited phases of a specified program. The work usually does not require knowledge of the interrelationships among functional areas or organizations. Employees who perform support work follow established methods and procedures. They may occasionally develop work plans or recommend new procedures related to the employee's individual assignments or immediate work unit. Support work is work that can be performed based on a practical knowledge of the purpose, operation, procedures, techniques, and guidelines of the specific program area or functional assignment. Support employees learn to do the work on the job, sometimes requiring many years of experience. They also may attend specific training courses related to their work.

Survey: The gathering of information about a situation. Often, surveys consist of sampling data from a population. Examples include a benchmark salary survey that collects pay data from benchmark jobs from a defined labor market, a maturity salary survey that collects both pay and experience data from a defined labor market for benchmark jobs or jobs in a given discipline at a given degree level, and a benefits survey that collects benefits data from a defined labor market. *Related to "accountability," "area wage survey," "breadth," "complexity," "depth,"*

"discretion," "impact of work", " knowledge, skills and abilities," "point factor system" and "scope."

Suspension: "An employee with permanent status in class or an employee who has served with the state as an assistant district attorney or an assistant state public defender for a continuous period of 12 months or more may be removed, suspended without pay, discharged, reduced in base pay or demoted only for just cause." *See s. 230.34(1)(a), Wis. Stats.*

Sweetheart contract: A collective bargaining agreement that is not the result of hard bargaining between the parties, but rather is signed by the parties in order to benefit each of them personally while avoiding true collective bargaining. *Related to "collective bargaining agreements," "escalator clause" and "zipper clause."*

Sympathy strike: A strike by workers not directly involved in a labor dispute to show support for those who are involved. . *Similar to "blue flu," "boycott," "collective bargaining," "concerted activity," " job action," "picketing," "red flu," "sitdown strike," "slowdown," " strike" and "white flu."*

Systemwide: An area of recruitment or certification including only current permanent classified employees within the UW System (including seasonal employees and employees on probation) who are not serving a limited term or project appointment basis. (Systemwide recruitments and certification were eliminated effective July 1, 2015 with 2013 Wisconsin Act 20.)

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Take-home pay: An employee's earnings less taxes, Social Security and other deductions (both voluntary and involuntary) made by the employer.

Task: One or more task elements making up a distinct activity that constitute logical and necessary steps in the performance of work by an employee. *Related to "goal statements on a position description," "job description", and "worker activities."*

Task element: The smallest step which it is practical to subdivide any work activity without analyzing separate motions, movements, or mental processes.

Teaching Assistants' Association - TAA: The bargaining unit name for program, project, and teaching assistants for the UW-Madison and Extension in Bargaining Unit designation T1.

Technical or Technician: Generally refers to a job requiring specialized knowledge involving a mechanical or scientific subject area; or a practical knowledge involving a skill. Similar to "paraprofessional," this is work that is similar to professional work

but does not have the breadth and depth of true professional work. A technical employee usually works in a scientific or technical field such as electronics, computers, etc. The technical employee carries out or implements plans or projects based on extensive experience and supplemental on-the-job training rather than on formal academic education in the discipline itself. Technical employees carry out tasks, methods, procedures, and/or computations that are laid out either in published or oral instructions and covered by established precedents or guidelines. Technical work is performed in a narrow or highly specialized area of the overall occupation and requires a high degree of practical knowledge and skill, care and precision. A technical employee does not perform the full range of duties assigned to professional employees, but does perform duties that are a narrow, specialized subset of the professional employees' duties or performs duties of lesser scope, impact, and complexity than duties assigned to professional employees. Technical duties tend to support the work of professional employees. A technical employee may carry out or implement plans or projects that are developed, planned, and managed by professional employees. Some technical work may appear similar to that performed by employees doing beginning-level professional work in the same general occupational field. The experienced technical employee often works with considerable independence for significant periods of time. This independence, however, does not alter the nature and character of the work, which is to support a professional discipline.

Temporary appointment maximum (TAM): An appointment maximum that must be pre-approved by the Division of Personnel Management and is established temporarily for the recruitment of a specific position due to special market needs. *See Comp. Plan, Sec. I, 3.00(5); related to "appointment maximum," "band," "broadbanding," "knowledge-based pay," and "pay band;" contrast with "hiring above the minimum rate" and "hiring rate."*

Temporary assignment: When the workload is such that the needs of the service require the performance of those duties by permanent employees temporarily assigned to perform those duties. *Contrast with "acting assignments" and "incidental duties."*

Temporary interchange: A formal interchange of an employee(s) on a temporary basis between and among governmental agencies at the same or different levels of government and with institutions of higher education. Any interchange agreements negotiated must be approved by the administrator of the DPM. *See s. 230.047, Wis. Stats.; ss. ER 3.05 and 47, Wis. Adm. Code; WHRH Ch. 400.*

Temporary Worker: "An alien coming to the United States to work for a temporary period of time. The Immigration Reform and Control Act of 1986 and the Immigration Act of 1990, as well as other legislation, revised existing classes and created new classes of nonimmigrant admission. *See WHRH Ch. 220.*

Termination: Cessation of employment.

Termination/sabbatical leave: Annual leave that was deferred during the year earned to be used in a subsequent year to extend the annual leave, unless used for termination leave. As such, termination/sabbatical leave is subject to the same usage and scheduling policies as annual leave. Annual leave can be used to extend an employee's termination date or used for a lump sum payment upon termination. *See WHRH Chs. 704 and 716.*

Test date: The date when an assessment is administered. In situations where the applicant completes the assessment at home, the assessment date is the applicants' deadline for submission of application materials.

Threshold: The minimal level of performance that must be achieved before an incentive can be paid.

Tie breaker: A method used to rank applicants with tied scores (for example, comparing scores on the most important parts of the assessment until a distinction is made).

Tie Breaker Sequence: These values are used to break ties in cases where applicants have equal scores at the highest level. Ties will be broken in sequential order according to total scores on parts or items. The most important part or item should be given a sequence number of 1, next most important is 2, etc. Applicants with higher scores on the most important parts will be given the higher rank. Determined by the job expert.

Tiered pay plan: A compensation system that differentiates salary based on time of hire (i.e., new employees are paid less than current employees for performing the same or similar jobs) as well as on nature of work performed.

Time off with pay: An employee benefit category that includes vacation, holidays, sick leave, meal periods, and other miscellaneous leave for which the employee is compensated. Also known as pay for time not worked. *Related to "holidays," "inside payroll costs," "pay for time not worked" and "sick leave;" similar to "employee benefits" and "fringe benefits."*

Top Part: The highest level part within the assessment structure.

Total compensation: The complete reward/recognition package for employees, including all forms of money, benefits, perquisites, services and in-kind payments.

Total pay: Base Pay plus any supplemental pay provided pursuant to the Compensation Plan or any labor agreement plus lump sum payments in a workweek or work period.

K K K

Trainee: An employee appointed to a permanent position for which a structured program of job related training and on the job experience is required, and the position is not being filled at the objective level. Special probationary period and pay provisions apply to employees appointed as trainees. *See s. ER 44.09 and s. ER-MRS 13.02(1), Wis. Adm. Code; Comp. Plan, Sec. E 1.04.*

Training directly related to the employee's job: Training designed to make an employee perform the present job more effectively, as distinguished from training designed to prepare an employee for another job, or to acquire a new or additional skill.

Transfer: "The permanent appointment of an employee to a different position assigned to a class having the same or counterpart pay rate or pay range as a class to which any of the employee's current positions is assigned." *See s.230.29, Wis. Stats.; s. ER 1.02(46), Wis. Adm. Code; related to "administrative transfer," "contractual transfer," "mandatory transfer" and "union transfer."*

Transfer opportunity: An opportunity open to current classified employees in Wisconsin state civil service who meet the position qualifications and whose current classification has the same or counterpart pay rate or pay range of the listed classification. May also be sought by classified employees seeking a lower level position as a demotion or by those individuals who have reinstatement eligibility.

Travel schedule amounts (TSA): This term typically includes any type of expense reimbursement relating to travel or moving expenses. This may also be referred to as "Uniform Travel Schedule Amounts" (UTSA). *See Comp. Plan, Sec. F; WHRH 764; BCER/TSA bulletins; collective bargaining agreements; related to "employee benefits," "fringe benefits," "holidays," "inside pay roll costs," "pay for time not worked," "sick leave" and "statutory benefits."*

Trial period: The time period during which an employee's performance is evaluated upon appointment to a Career Executive position prior to attaining permanent status. *See s. ER-MRS 30.06, Wis. Adm. Code.*

Two-tier pay plan: A dual pay structure that attempts to control labor costs by grandfathering the current structure for existing employees, but starting new employees under a second, lower-level pay structure.

U U U

Unable to Locate: A report of action on a certification when the individual could not be reached by phone, email or by letter, and the letter is returned to the human resources office with no forwarding address. If an individual cannot be reached by phone or email, a letter should be sent to them giving them five working days following the mailing of an inquiry.

Unauthorized Work: Hours worked by an employee without the employer's permission or contrary to the employer's instructions.

Unclassified: All state officers elected by the people, officers and employees appointed by the governor, the faculty and academic staff in the University of Wisconsin System, most division administrator positions, and justices of the Wisconsin supreme court. *See ss. 230.08(2) and (4), 230.148, 230.33, and 230.35, Wis. Stats.; Comp. Plan, Sec. B and C.*

Unclassified – non-executive salary group (ESG): "(1) 'ESG' employees in positions identified under *s. 20.923(4), (8), (9), and (12), Wis. Stats.*, in the executive or legislative branches; (2) "GSEG" employees in positions identified under *s. 20.923(7), Wis. Stats*; and (3) All other nonrepresented unclassified civil service ("non-ESG") employees in the executive branch, except: (a) Employees of the University of Wisconsin System. (b) Stenographers under *s. 230.08(2)(g), Wis. Stats*. (c) Employees of the Investment Board under *s. 230.08(2)(p), Wis. Stats*. (d) Three sales representatives of prison industries and one sales manager of prison industries identified under *s. 303.01(10), Wis. Stats*. (e) Employees who would be limited term employees if their employment were in the classified service (See Section D) (f) Unclassified attorneys when provisions of Section C of this Plan apply." *See Comp. Plan, Section B 3.01; contrast with "Executive Salary Group."*

Underutilized: Occurs when the percentage of racial/ethnic minorities or women in a job group is below the availability of those groups in the relevant labor pool. **In assessment development**: Based on an evaluation of the labor market, BEI identifies the availability rate of women and minorities in each job group statewide.. This is used to determine if the job group is underutilized for the enterprise or for a particular agency.(affects certification rules).

Unfair labor practice (ULP): A practice on the part of either union or management which violates the provisions set forth by state or federal labor relations laws. Any unfair labor practice specified in *s. 111.84, Wis. Stats.; related to "charge."*

Union security clauses: Provisions in collective bargaining agreements which are designed to protect the union as an organization by providing an uninterrupted flow of funds to the union. Examples are fair share, check off, and maintenance of membership. *Related to Maintenance of Membership agreement.*

Union transfer: The lateral movement of an employee from one position to another in accordance with transfer provisions established in the applicable collective bargaining agreement. *Contrast with "administrative transfer;" related to "transfer;" same as "contractual transfer" and "mandatory transfer."*

Unit supervisor: Sections may be divided into subunits which shall be known as "units" which shall be headed by "supervisors". *See s. 15.02(3)(c)(3), Wis. Stats.*

United Professionals for Quality Health Care, Service Employees International Unit AFL-CIO, 1199W -UPQHC: The bargaining unit for employees primarily involved in health care, also known as the professional patient care or nurses bargaining unit, in Bargaining Unit designation 11.

Upgrading: The advancement of a job to a higher grade or salary range. *Related to "gradual," "logical," "reallocation," "reclassification" and "regrade."*

Vacancy: "A classified position to which a permanent appointment may be made after the appointing authority has initiated an action to fill that position." S*ee s. 1.02(22), s. ER-MRS 1.02(34), and s. ER 1.02(47) Wis. Adm. Code.*

Vacating an award: The setting aside of an arbitration award by a court; rarely done.

Validity: The quality of a measuring device that refers to its accuracy (i.e., is the device actually measuring what it is intended to measure?), as distinguished from reliability which is a measure of consistency. The ultimate purpose of any assessment is validity or accuracy of measurement. This quality is extremely important for job analysis and job evaluation measures as well as for performance appraisal devices and employee selection.

Variable fringe rate: Percentage rate established by the Department of Administration and applied to wage adjustments to represent the cost of variable fringe benefits. The variable fringe rate is comprised of the employer's contribution (1) to the Wisconsin retirement system, (2) for life insurance benefits, and (3) for Social Security and Medicare taxes. *Related to "all funds cost," "all funds with fringe cost," "costing," "fiscal estimate," "pay for time not worked," "statutory benefits" and "time off with pay."*

Variance: The variance is a measurement used to characterize the dispersion of scores within the applicant pool. To calculate the variance of a given population, it is necessary to first calculate the mean of the scores, then measure the amount that each score deviates from the mean and then square that deviation (by multiplying it by itself). Numerically, the variance equals the average of the several squared deviations from the mean.

Verify (button): The button evaluates the assessment structure that has been built to see if it violates any business rules (e.g., must have items at the lowest level of the assessment).

Very: Use to describe a degree of work such as "very" responsible or "very" technical. This term should be used only to describe work at the objective level of a class specification. *Contrast with "highly;" related to "responsibility."*

Very Small Department: A department with between 1 and 50 positions. *Related to "large department," "major department," "medium department," and "small department."*

Veteran (for late application purposes): " . . . [A] person who fulfills at least one of the following requirements:

1. Served on active duty in the U.S. armed forces for at least 180 days, not including training.
2. Was discharged from the U.S. armed forces because of a disability incurred during active duty or because of a disability that is later adjudicated by the U.S. department of veterans affairs to have been incurred during active duty.
3. Was honorably discharged from the U.S. armed forces.
4. Is eligible to receive federal veterans benefits." s. 230.16(7m)(a), Wis. Stats.

Veteran Expanded Certification (VET): Requires certification of additional registrants based on 6 categories of veteran status. S*ee ss. 230.25 (1g) and (1m), Wis. Stats.*

Vocational Rehabilitation Act of 1973: Section 503 of this act is intended to promote job access for qualified individuals with disabilities. All employers with contracts or grants from the federal government in excess of $10,000 must take affirmative action or positive measures to employ qualified individuals with disabilities. Those employers with contracts of $50,000 or more who employ 50 or more people must take affirmative action as well. Any pay differentials between disabled employees and other employees with similar jobs are subject to Office of Federal Contract Compliance Programs scrutiny, and they must be justified on the basis of differential output or seniority. *Related to "Americans with Disabilities Act of 1990" and "disability."*

Volunteer: The person receives no compensation; or the person is paid expenses, reasonable benefits, a nominal fee, or any combination thereof to perform the services and such services are not the same type of services which the individual is employed to perform for the agency.

W W W

Wage differential: Differences in wage rates (for similar jobs) that can occur because of location of office, hours of work, working conditions, type of work performed, or other circumstances.

Wage level: The average salary paid to workers in an occupation.

Wage movement: An increase or decrease in the wage level for a particular job or occupation in a wage market.

Wage rate: The money rate, expressed in dollars and cents, paid to an employee per hour. *Similar to "across the board increase," "general wage adjustment" and "regular rate."*

Wage survey: A survey labor market used to determine the current rates for benchmark jobs. *Related to "external equity," "market adjustment," "market pricing," "market rates," "market-based salary increase budget;" same as "pay survey."*

Week: For FMLA purposes: The employe's normally scheduled workweek. Five days of leave which would otherwise be workdays for the requesting employe. For part-time employes, week normally means the employe's budgeted percentage of full-time equivalency (FTE) times 40 hours. For seasonal, sessional, and school year employes, week means the projected average number of hours the employe is scheduled to work each calendar week of the current period of appointment. *See WHRH Ch. 724 for the federal Family and Medical Leave Act (FMLA) and Wisconsin Family and Medical Leave Act (WFMLA) definitions.*

Weekend differential: Supplemental pay provided to certain classifications during specified hours that are considered to be part of the "weekend" rather than part of the standard five work days. *Similar to "add-on pay," "differential pay," "on-call pay," "premium rate," " pyramiding," "responsibility pay," "shift differential," "standby pay" and "supplemental pay."*

Weight: A factor by which an applicant score will be multiplied to create a raw score for that part or item. A weight of zero means that the applicant's score for that part or item will have no effect on his/her overall score. The higher the weight (relative to other weights), the higher the impact that item or part will have on the overall assessment results. All weights default to 1.00.

Whipsawing: The union tactic of negotiating with one employer at a time using each negotiated gain as a pattern or base from which to negotiate equal or better terms of settlement with the next employer.

White flu: A method used by nurses, in which nurses call in sick en masse instead of a strike. Other employees, such as police officer (blue flu) and fire fighter (red flu),

use the same tactic. *Similar to "blue flu," "boycott," "collective bargaining," "concerted activity," "job action," "picketing," "red flu," "sitdown strike," "slowdown," "strike" and "sympathy strike."*

Willful violation: Where the employer knew that its conduct was prohibited by the FLSA or showed reckless disregard for the requirements of the FLSA.

Wisc.Jobs: The State's online human resource recruiting system, which is the official vacancy announcement medium for open competitive, promotional, and transfer job opportunities in Wisconsin state civil service.

Wisconsin Education Association Council - WEAC: The bargaining unit name for employees in professional education, sometimes known as the teacher's contract, Bargaining Unit designation 13.

Wisconsin Employee Referral Service (WISCERS): A system through which vacancies are announced to candidates who have been laid off or are at risk to be laid off.

Wisconsin Law Enforcement Association – WLEA: The bargaining unit name for public safety employees in Bargaining Unit designation 63.

Wisconsin Personnel Partners: A unit within BMRS which promotes and manages testing and other human resources services for local jurisdictions in Wisconsin. Interested persons typically need to pre-apply for these examinations.

Wisconsin Physician and Dentist Association - WPDA: The bargaining unit name for dentist, physician, and psychiatrist (patient treatment) employees in Bargaining Unit designation 10.

Wisconsin Professional Employees Council - WPEC: The bargaining unit name for professional employees in Bargaining Unit designation 7.

Wisconsin Resident: By statute, a resident of this state means a person who, on the date he or she files an application (a) has established a residence, as defined in s. 6.10(l), in this state not less than ten days earlier; (b) has resided in this state for not less than a total of one year out of the immediately preceding five years; (c) is eligible to vote in this state; or (d) is the spouse or minor child of a person meeting the requirements of par. (a), (b) or (c). Further, a residence of a person is the place where the person's habitation is fixed, without any present intent to move, and to which, when absent, the person intends to return. A person who is eligible to vote must be (a) at least 18 years of age as of the Election Day; (b) a United States citizen; (c) a Wisconsin resident for ten days. Residency for voting is defined as a place where is person's habitation is fixed without any present intent to move. S*ee ss. 230.03(12) and 6.10, Wis. Stats.*

Wisconsin Retirement System (WRS) Separation Benefit: A lump sum WRS benefit payment taken by the employee prior to being eligible for a WRS immediate annuity.

Wisconsin Science Professionals - WSP: The bargaining unit name for employees in science related classifications in Bargaining Unit designation 15.

Wisconsin State Attorney Association - WSAA: The bargaining unit name for attorneys in Bargaining Unit designation 9.

Wisconsin State Building Trades Negotiating Committee - WSBTC and Appropriate Affiliated Building Trades Councils: The bargaining unit including trade employees under Bargaining Unit designation 4.

Wisconsin State Employees Union - WSEU, AFL-CIO, AFSCME: This union recognizes six separate bargaining units. These are Blue Collar and Non-Building Trades, designation 3; Administrative Support unit, designation 2; Security and Public Safety, designation 5; Technical, designation 6; Professional Social Services, designation 12; and Law Enforcement, designation 36.

Wisconsin Works (W-2) Program: An economic support program that makes economic support contingent on work. Chapter ER-MRS 27, Wis. Adm. Code, provides for creation and approval of separate recruitment, assessment and certification techniques for welfare recipients. Current application of this rule allows agencies to selectively certify only W-2 participants from registers and conduct separate recruitment using procedures similar to EPP for Clerical Assistant 2 & Program Assistant 1 which are open only to W-2 participants (in pilot stage).

Within range pay step (WRPS): The value used to determine the amount of a pay adjustment when the applicable transaction pay provisions use a WRPS or multiple of a WRPS when establishing the appropriate pay, and to set trainee pay rates. In most schedules, the WRPS is the difference between the PSICM and minimum of a pay range. *See Comp. Plan, Sec. I 3.00(6); related to "grid step" and "step"*

Women Expanded Certification (WEC): Allows for certification of additional women from the register (only applies if position is included in job group that is underutilized for women).

Work hours: Work time as directed by the appointing authority during which an employee must be on duty and at a prescribed place of work. In determining overtime hours for nonexempt employees, work hours means hours worked as defined in Chapter 520 of the Wisconsin Human Resources Handbook. *See Comp. Plan, Sec A - 4.01 (14); Related to "Pay status."*

Work period: Applies only to public safety employees and means any established and regularly recurring period of no less than 7 consecutive days and no more than 28 consecutive days. A work period of more than seven consecutive days may only be

established for fire protection and law enforcement employees of hospitals and residential care establishments. The work period need not coincide with the pay period or with a particular day of the week or hour of the day and it need not coincide with the time periods established for the purpose of determining overtime pay requirements pursuant to negotiated agreements or the compensation plan.

Work site: Any location designated by the employer at which the employee performs his or her assigned duties. *Related to "assigned headquarters" and "headquarters city."*

Work week: A fixed and regularly recurring period of 168 hours in the form of consecutive 24-hour periods. The workweek need not coincide with the calendar week (it may begin any day of the calendar week and any hour of the day) and it need not coincide with time periods established for the purpose of determining overtime pay requirements pursuant to negotiated agreement or the Compensation Plan**.**

Worker activities: The specific tasks the employee performs to accomplish the goals. "Worker activity" statements on a Position Description describe what a worker actually does. *Same as "job duties"; related to "task."*

Worker Adjustment and Retraining Notification Act of 1988 (WARN): Requires employers of 100 or more full-time employees, with limited exceptions, to give employees 60 days notice of plant closing and mass layoffs.

Worker's Compensation: "Subject to the provisions of *Ch. 102, Stats.,* an employee suffering an injury while performing service growing out of and incidental to his or her employment, is entitled to worker's compensation." *See Ch. ER 28, Wis. Adm. Code; WHRH Ch. 756; contrast with "hazardous employment" and "protective occupation participant status."*

Z ***Z***

Z

Zipper clause: A provision in a collective bargaining agreement that specifically states that the written agreement is the complete agreement of the parties and that anything not contained therein is not agreed to unless put into writing and signed by both parties following the date of the agreement. The zipper clause is intended to stop either party from demanding renewed negotiations during the life of the contract. *Related to "collective bargaining agreements," "escalator clause" and "sweetheart contract."*

W W W

This page last updated in Release Number: 17-01
Release Date: 10/02/17
Effective Date: 10/02/17

Glossary

A

Add-on Pay: An hourly amount paid in addition to the base pay in recognition of factors or conditions not reflected in the basic pay range or pay rate of a position. See Comp. Plan Sec. A; similar to "differential pay," "night differential," "on-call pay," "premium rate," "pyramiding," "responsibility pay," "shift differential," "standby pay," "supplemental pay," and "weekend differential."

Adjusted Continuous Service Date (ACSD): The length of time in the most recent period in continuous state employment in either the unclassified service under s. 230.08(2), Wis. Stats., or as a permanent employee in the classified service or both, revised for certain breaks in state service.See Ch. ER 18, Wis. Adm. Code

B

Base Pay Rate: The official hourly pay rate excluding any overtime or supplemental pay. Base pay rate is limited to the pay range maximum; base pay rate plus any supplemental pay received is not limited to the pay range maximum. Base pay is also the rate at which accumulated sick leave credits are converted to offset health insurance upon retirement, and/or to pay out earned but unused annual leave credits upon retirement or departure from state service. See s. ER 1.02(5), Wis. Adm. Code; similar to "across the board increase," "general wage adjustment," "pay adjustment," "regular rate," and "wage rate."

C

Career Executive: Highly qualified executive candidates who have demonstrated knowledge and skills acquired through work experience and training, which, in the judgment of the director, will provide reasonable prospects for success in career executive positions. (See s. ER-MRS 30.03(1), Wis. Adm. Code.)

Class or Classification: A group of positions sufficiently alike in respect to their duties and responsibilities to justify common treatment in the various employment processes. See s. 230.09, Wis. Stats.; similar to "allocation pattern" and "job grade."

Classification Code: A unique set of digits assigned to each classification used in personnel/payroll data processing to identify class title, pay schedule and pay range. See Alphabetical Listing of Classifications.

Classified Employee: An employee included in the classified service comprised of all positions not included in the unclassified service. See ss. 230.08(3) and 230.09(2)(a), Wis. Stats.

Continuous Service: All the time in continuous employment status, as defined in s. ER 18.01(3) and computed under s. ER 18.02(2), in the unclassified service or as a permanent employee in the classified service. Continuous service does not include time served in limited term employment and in those positions under s. 230.08 (2)(j) and (k), Wis. Stats., regarding youth camps and students, respectively. Frequently confused with "adjusted continuous service" and "credible service." See s. ER 1.02(6), Wis. Adm. Code; WHRH Ch. 732; related to "adjusted continuous service date."

D

Demotion: "The permanent appointment of an employee with permanent status in one classification to a position in a classification lower than the highest position currently held in which the employee has permanent status in class, unless excluded under s. ER-MRS 17.02, Wis. Adm. Code. A 'demotion' can be voluntary or involuntary." (See also "involuntary demotion" and "voluntary demotion.") See ss. 230.28(1)(d) and 230.34, Wis. Stats; s. ER 1.02(8), Wis. Adm. Code; similar to "downgrade;" related to "layoff."

Disability: Under the Americans with Disabilities Act of 1990 (ADA), a physical or mental impairment that substantially limits one or more of the major life activities of an individual. A disability is said to exist when record is made of such an impairment or the employer regards the employee as having such an impairment. Related to "Americans with Disabilities Act of 1990," and "Vocational Rehabilitation Act of 1973."

Disabled Veteran: "A veteran who has a service-connected disability." See s. 230.03(9m), Wis. Stats.

E

Employing Unit: "[A]n agency or a functional, organizational or geographic unit within the agency which has been approved under s. 230.30, Wis. Stats., for the agency to use for any one or combination of the following: promotion, demotion, transfer, reinstatement, restoration, layoff and other related personnel transactions." s. ER-MRS 1.02(7), Wis. Adm. Code.

Exempt: A term categorizing an employee as not subject to the overtime provisions of the Fair Labor Standards Act (FLSA). See Comp. Plan, Sect, A 4.01(3); WHRH Ch. 520; Title 29, Part 541 of the Code of Federal Regulations; Alphabetical Listing of Classifications for classification status; contrast with "nonexempt;" related to "docking," "Fair Labor Standards Act," and "salaried employee."

F

Fair Labor Standards Act (FLSA): As it relates to state employees, a federal law governing the minimum wage, compensation for hours worked over 40 in a workweek, child labor, and recordkeeping requirements. Although state law

and/or collective bargaining agreements may establish higher standards, they cannot establish lower standards or waiver from federal provisions. See WHRH Ch. 520 for a glossary of terms related to administration of the FLSA; Title 29, Part 541 of the Code of Federal Regulations; Alphabetical Listing of Classification for classification status; related to "docking," "exempt," "hours of work," "nonexempt, "overtime," and "salaried employee."

Filled Position Transfer: Form of competition where an employee stays in the same position number and the position is assigned duties that result in the position remaining in the same classification or moving to a different classification assigned to the same or counterpart pay range. The incumbent is selected to remain in the same position, provided due consideration was given to other individuals and the incumbent's qualifications for the position were assessed in relation to the job requirements.

Full Time Equivalence (FTE): The amount of hours budgeted for a position. A position budgeted for 80 hours in a bi-weekly pay period would be 1 FTE; a position budgeted for 40 hours in a bi-weekly pay period would be .5 FTE.

G

Grievance: A written complaint by an employee requesting relief in a matter which is of concern or dissatisfaction relating to conditions of employment or adverse employment decisions and which is subject to the control of the employer and within the limitations of Wisconsin Statutes and the Wisconsin Administrative Code. For represented employees, it is usually concerning the interpretation or application of the contract. See s. 230.445, Wis. Stats; s. ER 46.02(4), Wis. Adm. Code and collective bargaining agreements; related to "past practice."

I

Incumbent: A person occupying and performing a job. Same as "employee."

J

Job Family: A group of jobs having the same nature of work (e.g., accounting) but requiring different levels of skill, effort, responsibility or working conditions (e.g., Accountant Entry vs. Accountant Senior).

L

Leave of Absence: "Absence from employment with the approval of the appointing authority with or without loss of pay in accordance with the appropriate statutory provision or rule." A leave of absence may be paid or unpaid, and may also be authorized under a collective bargaining agreement. See ss. ER 1.02(16), 18.02, and 18.14, Wis. Adm. Code; related to "family leave" and "Family Medical Leave Act."

LTE: Limited Term Employee

N

Nonexempt: A term categorizing an employee as subject to the overtime provisions of the Fair Labor Standards Act (FLSA). See Comp. Plan, Sec. A 4.01(5); See WHRH Chap. 520, Administration of the Fair Labor Standards Act; Title 29, Part 541 of the Code of Federal Regulations; contrast with "exempt;" related to "docking" and "Fair Labor Standards Act.."

P

Pay Range: A pay range typically consists of a minimum and maximum amount and a within-range pay step or transaction step and in some pay ranges, a PSICM amount; all of these are expressed in hourly amounts based on official hourly rate rounding. Each classification is assigned to a pay range by the Administrator of the Division of Personnel Management; for classifications included in a public safety represented bargaining unit, the assignment of classifications to pay ranges is subject to collective bargaining. See ss. 230.09(1) and (2)(b); 230.12, and 111.825, 111.825(5), and 111.91, Wis. Stats.; related to "pay schedule" and "pay steps."

Pay Schedule: A set of pay ranges to which a set of classifications are assigned. Typically, separate pay schedules are negotiated under s. 111.91, Wis. Stats. for each eligible bargaining unit and established in the compensation plan for specified groups of nonrepresented classifications or bargaining units not covered by s. 111.91, Wis. Stats. Related to "pay range."

Probationary Period: The time period during which an employee's performance is evaluated upon appointment to a position prior to attaining permanent status. See s. 230.28, Wis. Stats. and s. ER 1.02(31) and s. ER-MRS 1.02(24), Wis. Adm. Code; WHRH Ch. 576; contrast with "permanent status."

Promotion: "Except as provided in ER-MRS 14.02, Wis. Adm. Code, 'promotion' means any of the following: (a) The permanent appointment of an employee to a different position in a higher class than the highest position currently held in which the employee has permanent status in class; (b) The permanent appointment of an employee or former employee in layoff status to a different position in a higher class than the highest position in which permanent status in class was held at the time the employee or former employee became subject to layoff; or (c) the permanent appointment of an employee on an approved leave of absence, either statutorily mandated or granted by an appointing authority, to a different position in a higher class than the highest position in which permanent status in class was held at the time the employee began the leave of absence." See s. 230.19, Wis. Stats.; s. ER 1.02(36) and s. ER-MRS 1.02(27), Wis. Adm. Code; related to "competition."

R

Reallocation: The assignment of a position to a different class, based on a change in the concept of the class or series; the creation of new classes; the abolishment of existing classes; a change in the pay range of the class; the correction of an error in the previous assignment of a position; a logical change in the duties and responsibilities of a position; or a permanent change in the level of accountability of a position such as that resulting from a reorganization. Reallocation is the transaction used to implement classification survey activities. See s. 230.09(2), Wis. Stats.; ss. ER 1.02(38) and 3.01(2), Wis. Adm. Code; WHRH Ch. 370; contrast with "allocation"; related to "logical," "reclassification", "regrade;" and "upgrading."

Reasonable Accommodation: Alternatives, adjustments, or changes in the job, the workplace, assessment or examination, and/or term or condition of employment which will enable an otherwise qualified handicapped individual to perform a particular job successfully, as determined on a case-by-case basis, depending on the individual's circumstances.

Reclassification: The assignment of a filled position to a different class based upon logical and gradual change to the duties or responsibilities of a position or the attainment of specified education or experience by the incumbent such that the duties performed are better described by a new classification title. Reclassification can result in upward and lateral, as well as downward movement for the position. See s. 230.09(2), Wis. Stats.; ss. ER 1.02(39) and 3.01(3), Wis. Adm. Code; WHRH Chs. 370 and 380; contrast with "allocation;" related to "gradual," "logical," "reallocation," "regrade," and "upgrading."

T

Transfer: "The permanent appointment of an employee to a different position assigned to a class having the same or counterpart pay rate or pay range as a class to which any of the employee's current positions is assigned." See s.230.29, Wis. Stats.; s. ER 1.02(46), Wis. Adm. Code; related to "administrative transfer," "contractual transfer," "mandatory transfer" and "union transfer."