

# Action/Action Reason Job Aid

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## General Tips

- Using the correct Action/Action Reason is important for many reasons:
  1. The State Employee Personnel Roster uses Job Data to create the official record of an employee's job history.
  2. Some Action/Action Reasons trigger pay and/or benefit events. Using the correct combination ensures these events happen. Using the wrong combinations triggers events that should NOT happen.
  3. Workforce Reporting relies on data from PeopleSoft. If the data is wrong the reporting is wrong.
- If you ever have a question about the most appropriate Action/Action Reason to use please submit a JIRA ticket to Core Human Resources or contact DPM, Enterprise HR for guidance.
- NEVER add rows to Person or Job Data or submit Position Change Requests to correct an error on Person, Job or Position Data. Always submit a JIRA ticket requesting a correction.
- NEVER delete Person, Job or Position Data Rows even if the system allows you to. Always submit a JIRA ticket requesting the correction.
- Remember that effective dates are key to all data withing PeopleSoft HCM. The effective date of Person Data, Position Data, and Job Data are all dependent upon one another.
- Always use the lowest empl record number possible, if one exists, when you are rehiring. Don't create a new instance if you don't need to.

### IMPORTANT:

CWR (contingent worker or "contractor") records can't be POI or Employee records.

POI records can't be CWR or Employee records.

Employee records can't be CWR or POI records.

You need to create a new instance if a POI becomes an employee or a CWR.

You need to create a new instance if a CWR becomes an employee or POI.

You need to create a new instance if an employee becomes a CWR or POI.

## Contingent Worker & Person of Interest - Add, Complete, Update Supervisor

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Add Contingent Worker</b>	ADD	<b>Contingent Worker</b>	CWR	First day report to work	<p>Used for adding new Contingent Workers (CWR or Contractor) into PeopleSoft and/or adding a new CWR instance.</p> <p>This should also be used when a CWR is starting a new contract on the same Empl Record as a previously completed one.</p> <p><i>Note: New CWR instances should only be added if the CWR has multiple concurrent contracts.</i></p>	Active	Active	Active	MSC
<b>Add Person of Interest</b>	POI	<b>Add Person of Interest</b>	POI	First day report to work	<p>Used for adding new Person of Interest (POI or Other Payee) into PeopleSoft.</p> <p>This should also be used to reactivate a completed POI instance or adding a new POI instance.</p> <p><i>Note: Specific POI types will be selected at the time of adding a POI. We are unable to change the POI type after it is created. New POI instances should only be added if the POI has multiple concurrent instances.</i></p>	Active	Active	Active	POI
<b>Completion</b>	COM	<b>Completion</b>	COM	Day AFTER last date worked	<p>Used to end a Contingent Worker or Person of Interest relationship. This reason should be used regardless of the reason for the relationship ending.</p> <p><i>Note: Do not use termination actions on CWR or POI relationships.</i></p>	Terminated	Inactive	Active	TER
<b>Data Change</b>	DTA	<b>Update Contractor's Supervisor</b>	CWS	Sunday, beginning of PP	Used to change a supervisor in the reports to field on a contingent worker's (CWR) job data because the CWR is not in a position.	Active	Active	Active	MSC
<b>REMEMBER</b>									
CWR (contingent worker or "contractor") records can't be POI or Employee records. POI records can't be CWR or Employee records. Employee records can't be CWR or POI records.					You need to create a new instance if a POI becomes an employee or a CWR. You need to create a new instance if a CWR becomes an employee or POI. You need to create a new instance if an employee becomes a CWR or POI.				
CWR and POI instances should never have any personnel transaction rows (hire, rehire, transfer, promotion, demotion).									

## Data Change

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Data Change</b>	DTA	<b>Absence Eligibility Change</b>	ABS	Sunday, beginning of PP	<p>Used to update an employee's absence eligibility group on job data when their FLSA status changes.</p> <p><b>For example:</b> A position is reclassified or reallocated and the FLSA status changes from non-exempt to exempt or vice versa. After the position change has been made via the position change request form, a pay rate change row would be added to job data (if applicable) followed by an absence eligibility change row.</p> <p>This is also used when an employee is moving from one position to another and the FLSA status changes upon the personnel transaction (transfer, promotion, demotion). This does not apply to hires or rehires.</p> <p><i>Note: DO NOT add a row or use this action/reason to correct an error from a previous job row. If there was an entry error, create a ticket for correction.</i></p> <p>Also see <a href="#">Personnel Transactions - Order of Operations</a></p>	Active	Active	Active	DTA

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Data Change	DTA	Benefits Eligibility Config	BEC	Date varies by situation – see below	<p>This must be used anytime there is an update to a benefits eligibility field on the benefit program participation page on job data. Reasons an eligibility field may need to be updated include:</p> <ul style="list-style-type: none"> <li>• Employee becomes eligible for WRS via lookback and Elg Fld 1 needs to be updated</li> <li>• Employee becomes eligible for a different WRS category and Elg Fld 1 needs to be updated</li> <li>• Employee gains or loses eligibility for an ICI or State Group Life Premium waiver so Elg Fld 5 must be updated</li> <li>• A WRS-covered LTE gains/loses an LTE appointment and eligibility for the employer contribution towards health insurance changes so Elg Fld 3 must be updated.</li> </ul> <p>This action/reason is required when an employee’s benefits eligibility is changing even if the change is a result of a personnel transaction (transfer, promotion, demotion, reclassification, reallocation)</p> <p>This should be used for any benefits eligibility change.</p> <p><i>Note: DO NOT add a row or use this action/reason to correct an error (ex. hire or rehire row) from a previous job row. If there was an entry error, create a ticket for correction.</i></p> <p>Also see <b>Personnel Transactions - Order of Operations</b></p>	Active	Active	Active	ELG
<p><b>Effective Date to Use:</b></p> <ul style="list-style-type: none"> <li>• WRS Lookback: 1st day of WRS eligibility</li> <li>• Disability Premium Waiver: 1st day of pay period that pays for coverage month in which premium waiver is effective</li> <li>• WRS Category Change: 1st day eligibility changes (typically Sunday, beginning of PP)</li> <li>• Eligibility for ER contribution change: 1st pay period associated with the coverage month of the change</li> </ul>									
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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Data Change	DTA	Change in Primary Job	OPJ	Same day the Primary Job changes, usually at the time of a new appointment, therefore, the Sunday, beginning of PP.	When an employee has multiple active instances, one of those instances needs to be the primary job. The "Change in Primary Job" reason is used when there is a change in the designation of the primary or secondary instance.  <i>Note: Submit a ticket so Central Benefits can confirm that benefits are connected to the correct employment instance.</i>	Active	Active	Active	DTA
Data Change	DTA	Employing Unit Change	EUC	Sunday, beginning of PP	Used when employing units (employee category) change within an agency and employees must be moved to the new employing unit.	Active	Active	Active	DTA
Data Change	DTA	Exhaust Accrued Leave	EAL	First date employee is no longer in office and starts using leave to remain on payroll	Used when an employee is exhausting paid leave prior to retirement/termination.  Note: Termination or retirement job data row must be entered on job data after this row to complete the retirement or termination. This transaction does not change the HR, benefit or payroll status of the employee.	Active	Active	Active	DTA
Data Change	DTA	Hold Pay Progression	HPP	First Date employee is no longer in pay status	Used to remove employees from the automated pay progression process due to a loss of eligibility.	Active	Active	Active	DTA
Data Change	DTA	Resume Pay Progression	RPP	Day employee is put back in pay status	Used to add employees back into the automated pay progression process once eligibility is regained.	Active	Active	Active	DTA
Data Change	DTA	Surplus	SUR	Sunday, beginning of PP	Used to transfer employees in <b>and</b> out of surplus positions.  <i>Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions.</i>	Active	Active	Active	DTA
Data Change	DTA	Update Tax Location	UTL	Sunday, beginning of PP	Used to change an employee's tax location when working remote or partially remote in another state.	Active	Active	Active	DTA

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Data Change</b>	DTA	<b>Transfer Data</b>	TRF	Sunday, beginning of pp	<p><i>Workforce Administration &gt; Job Information &gt; Request Job Change</i></p> <p>Job data row created by the Request Job Change functionality. Used to move an employee into a different departmental security.</p> <p>This is strictly used as a mechanism to change the position number on job data so the employee's information can be moved to their new departmental security.</p> <p>This can be used on active or inactive job records.</p> <p>The action/reason will not change the payroll, HR, or benefit status of the employee. Additional job data rows must be created (sequenced) to complete the transaction (i.e. transfer, promotion, demotion, rehire).</p>	Active	Active	Active	DTA
<b>Important notes regarding Data Change/Transfer Data Between Agencies (PeopleStealer)</b>					<p><i>A Job Change Request is <b>not</b> required if hiring a current employee through Manage Hires in TAM.</i></p> <p><i>Note: If stealing an <b>active</b> record, communicate with the sending agency before processing the Job Change Request to ensure all time has been entered and approved.</i></p> <p><i>Corrections to the effective date of these rows cannot be made; a ticket must be submitted to delete the row and the Request Job Change must be processed again using the correct date or DPM Enterprise HRIS Operations must manually move the employee into the new department security using a Data Change/Other Data Change. Corrections to other data on these rows (position number, effective sequence, etc.) can be made; a ticket must be submitted and DPM Enterprise HRIS Operations will make the correction(s).</i></p> <p><i>You can not steal a record that is not in a position number or that you will not be putting in a position number. You must submit a ticket for DPM Enterprise HRIS Operations to manually move the record into your security in these instances.</i></p> <ul style="list-style-type: none"> <li>• <i>Never steal a National Guard record (identified by Empl Class NGD).</i></li> <li>• <i>Never steal a record from another company (WIS to LEG or COURTS, LEG to WIS or COURTS, COURTS to WIS or LEG).</i></li> <li>• <i>Never steal a CWR record for anything other than a new CWR appointment.</i></li> <li>• <i>Never steal a POI record for anything other than a new POI appointment.</i></li> <li>• <i>Never steal an Employee record for anything other than a new Employee appointment.</i></li> <li>• <i>CWR records can't be POI or Employee records. POI records can't be CWR or Employee records. Employee records can't be CWR or POI records.</i></li> </ul> <p><i>You will need to create a new instance for any of the above examples.</i></p>				

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Data Change	DTA	Other Data Change	ODC	Sunday, beginning of PP	<p><b>The use of this Action/Reason should be very limited.</b></p> <p>Used for additional job data changes that are not maintained through the position request form and when another action/reason is not more appropriate.</p> <p><i>Note: DO NOT add a row or use this action reason to correct an error from a previous job row. If there was an entry error, create a ticket for correction.</i></p>	Active	Active	Active	DTA
Data Change	DTA	ICI Category Change	ICI	1st day of PP associated with February ICI coverage	<p><i>Central Benefits use ONLY.</i></p> <p>This is used to change an employee's ICI category (Benefits Elg Fld 2) during the annual ICI update period ONLY. This job row is added by a central mass job update process. There should be no ICI category changes outside of the annual update period.</p>	Active	Active	Active	ICI
Data Change	DTA	ICI Deferred Enrollment	DEF	3-2-XXXX (3-1-XXXX for LEG)	<p><i>Central Benefits use ONLY.</i></p> <p>This is used to indicate an employee's eligibility for ICI Deferred Enrollment (Benefits Elg Flds 2 and 4 will be updated to reflect eligibility). This job row is added by a central mass job update process.</p>	Active	Active	Active	DEF
Data Change	DTA	Courts Only-Reappointed	REA		<i>To be used by Courts ONLY.</i>	Active	Active	Active	DTA
Data Change	DTA	Courts Addl Yr Exp Cr Granted	ADC		<i>To be used by Courts ONLY.</i>	Active	Active	Active	DTA
Data Change	DTA	Courts Experience Credit Adj	ECA		<i>To be used by Courts ONLY.</i>	Active	Active	Active	DTA
Data Change	DTA	Courts FTE Change (Total)	FTE		<i>To be used by Courts ONLY.</i>	Active	Active	Active	ELG
Data Change	DTA	Courts Job FTE Chg (No Total)	JFT		<i>To be used by Courts ONLY.</i>	Active	Active	Active	DTA
Data Change	DTA	Courts Probation Completed	PRC		<i>To be used by Courts ONLY.</i>	Active	Active	Active	DTA

## Demotion

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are still required.</b>									
Transfer	XFR	Demotion Voluntary Between Agencies	VBA	Sunday, beginning of PP	Used for the personnel transaction of a voluntary demotion between agencies. Tax location is captured on this row. Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.	Active	Active	Active	DEM
Transfer	XFR	Demotion Voluntary Within Agency	VWA	Sunday, beginning of PP	Used for the personnel transaction of a voluntary demotion within an agency. Tax location is captured on this row. Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.	Active	Active	Active	DEM
Transfer	XFR	Involuntary Demotion	IND	Sunday, beginning of PP	Used for the personnel transaction of an involuntary demotion. Tax location is captured on this row. Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.	Active	Active	Active	DEM
Transfer	XFR	Demotion In Lieu of Layoff	LLA	Sunday, beginning of PP	Used for the personnel transaction of a demotion in lieu of layoff. Tax location is captured on this row. Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.	Active	Active	Active	DEM
Transfer	XFR	Demotion - Legislature Only	DEM		<i>To be used by Legislature ONLY.</i>	Active	Active	Active	DEM
<p style="color: red;"><i>Remember: Demotions can only occur for Permanent/Classified Employees &amp; cannot be used for LTE's, Project/Project, or Unclassified.</i></p> <p style="color: red;"><i>Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions.</i></p> <p style="color: red;"><b>See <a href="#">Personnel Transactions - Order of Operations</a> and <a href="#">Personnel Transaction Scenarios</a></b></p>									

## Hire

↓ Every Employment Instance should only ever have ONE (1) Hire Row. Every subsequent "Hire" on the same Employment Instance should be processed as a Rehire ↓

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.</b>									
Hire	HIR	Hire No WRS	NWR	See Below	<p>Used when an employee is hired for the first time in PeopleSoft or a new employment instance is added and employee has no prior WRS service (either have never been covered by the WRS or have taken a separation benefit and no longer have any WRS service) and they are not coming from an affiliate.</p> <p>Comp rate and tax location are captured on this row.</p> <p>Review and update Continuous Service Date and Benefit Service Date if needed.</p>	Active	Active	Active	HIR
Hire	HIR	Hire Prior WRS	PWR	See Below	<p>Used when an employee is hired in PeopleSoft for the first time or a new employment instance is added and employee has prior WRS state service (they have NOT taken a separation benefit) and they are not coming from an affiliate.</p> <p>Comp rate and tax location are captured on this row.</p> <p>Review and update Continuous Service Date and Benefit Service Date if needed.</p>	Active	Active	Active	HIR

### Hire Event Notes

- Hire Effective Date:
  - New hires are effective when the employee reports to work.
  - Hires **without a break in service or break less than 30 days** (e.g. new employment instances) are effective the Sunday, beginning of PP.
- If the employee is WRS-eligible, these job actions will open a HIR event in eBenefits. The benefits service date on the employment data page in job data must be correct when the HIR event prepares to ensure employee's eligibility for the employer contribution towards health insurance is determined correctly.
- Hire action/reasons do NOT drive the employee's eligibility for the employer contribution towards health insurance - the benefits service date on job data - employment data page does.
- If the benefit eligibility fields or benefits service date are not correct when hire entered, submit a ticket for correction. The HIR event will not prepare correctly if the information is wrong.

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↓ Every Employment Instance should only ever have ONE (1) Hire Row. Every subsequent "Hire" on the same Employment Instance should be processed as a Rehire ↓

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.</b>									
Hire	HIR	Hire from Affiliate	HAF	See Below	<p>Used when an employee is hired for the first time in PeopleSoft and is coming from another state payroll center (UW; UWH&amp;C; Wisconsin Housing and Economic Development Authority (WHEDA); Fox River Navigational Systems Authority (FRNSA); Wisconsin Economic Development Corporation (WEDC); Wisconsin Health and Educational Facilities Authority (WHEFA); and there should be no lapse in benefits, or when the employee is moving between companies (WIS, LEG, COURTS) and there should be no lapse in benefits, or when an employee is approved for an LOA to fill either a project or unclassified appointment and you are creating a new instance. Hires of employees who have existing/active empl records with a different company (WIS, LEG, COURTS) require separate employment instances for each company.</p> <p>Comp rate and tax location are captured on this row.</p> <p>A HIR event in eBenefits does NOT open to employee - all benefits must be entered manually by Benefits Specialist on the HFA event.</p> <p>Review and update Continuous Service Date and Benefit Service Date if needed.</p> <p style="color: red;"><i>Note: Agency may not know Benefits Elg Fld 2 value (ICI eligibility). If correction needed after HFA entered, create a ticket.</i></p>	Active	Active	Active	HFA
<b>Effective Date to Use:</b> <ul style="list-style-type: none"> <li>New hires are effective when the employee reports to work.</li> <li>Hires <b>without a break in service or a break less than 30 days</b> (e.g. new employment instances) are effective the Sunday, beginning of PP.</li> </ul>									
Hire	HIR	Conversion	CNV	NA	<b>Do Not Use.</b> All active employees (and employees terminated within 45 days) at the time of conversion will have this.	Active	Active	Active	HIR

## Layoff

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Layoff	LOF	Seasonal	SEA	Day AFTER last date worked	Used for seasonal employees, such as those at DNR, who are permanent employees on a seasonal rotation.	Suspended	Active	Suspended	LOF
Layoff	LOF	Temporary Layoff	TMP	Day AFTER last date worked	Used for employees whose positions are funded by federal grants, and the federal government shuts down temporarily. In addition, this action/reason is used for temporary layoff under ER-MRS 22.14, Wis. Adm. Code or furloughs. This code is NOT used for permanent layoff, see Terminated with Benefits action/reason.	Suspended	Active	Suspended	LOF

## Leave of Absence

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Unpaid Leave of Absence	LOA	Filling a Project Position	FPP	See Below	Used when an employee is on an approved leave of absence from a permanent classified position to fill a project position.  They will not be paid for their permanent/classified position while on leave.	Leave of Absence	Active	LOA	LOA
Unpaid Leave of Absence	LOA	Filling Unclassified Position	FUP	See Below	Used when an employee is on an approved leave of absence from a permanent classified position to fill an unclassified position.  They will not be paid for their permanent/classified position while on leave.	Leave of Absence	Active	Leave with Benefits	LOA

*Note: A new employment instance will need to be added for the project or unclassified appointment if there isn't an available instance to use. Use Hire/Hire from Affiliate with a new instance or Rehire/Rehire from Affiliate with an existing instance to avoid benefit issues.*

*Must move the primary benefits flag to new employment instance to ensure benefit deductions continue.*

### Effective Date to Use:

Day AFTER last date worked and the same day as the appointment of the project or unclassified position which should be the Sunday, beginning of PP.

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### Leave of Absence Continued from Previous Page

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>↓ A Leave of Absence must be entered on an employee's job data if they will be gone for at least one full pay period, paid or unpaid. ↓</b>									
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Adoption</b>	ADP	Day AFTER last date worked (NOT last day in pay status)	Used for employees who are not eligible for or have exhausted their FMLA and who are approved to take a Leave of absence for an adoption.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>	PLA	<b>Candidate for Partisan Office</b>	CPO	Day AFTER last date worked	Used when an employee is placed on a leave of absence to campaign for partisan office.  <i>Note: The employee may not take paid leave during this time but is eligible to receive the employer contribution towards health insurance for up to three (3) months. After that the employee is responsible for the full cost if they chose to continue their benefits.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Education</b>	EDU	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is approved to take a leave of absence for educational reasons.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Exceptional Personal Reasons</b>	EPR	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is approved to take a leave of absence for exceptional personal reasons.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	LOA	LOA
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**↓ A Leave of Absence must be entered on an employee's job data if they will be gone for at least one full pay period, paid or unpaid. ↓**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Family and Medical Leave Act</b>	FML	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is eligible and approved for federal and/or WI FMLA.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Maternity Leave</b>	MAT	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is not eligible for or has exhausted their FMLA and is approved to take a leave of absence for maternity leave.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Medical</b>	MED	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is not eligible for or has exhausted their FMLA and is approved to take a leave of absence for health/medical reasons for the employee or qualifying family members.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Military Service</b>	MIL	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is on military leave.	Leave with Pay	Active	Leave with Benefits	LML

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## Leave of Absence Action Continued from Previous Page

↓ A Leave of Absence must be entered on an employee's job data if they will be gone for at least one full pay period, paid or unpaid. ↓

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Paternity Leave</b>	PAT	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is not eligible for or has exhausted their FMLA and is approved to take a leave of absence for paternity leave.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>	PLA	<b>Red Cross - 230.35(3)(e)</b>	SDR	Day AFTER last date worked	Used when an employee has been granted a leave of absence (LOA) for "Specialized Disaster Relief Services" pursuant to s. 230.35(3)(e), Wis. Stats. This LOA may only be granted to employees who are certified disaster service volunteers of the American Red Cross in accordance with provision of s.230.35(3)(e), Wis. Stats.  Before placing the employee in this LOA status, HR needs to verify the employee has received a written request from the American Red Cross for a disaster as authorized in the Governor's September 8, 2017 (or similar for future events).  This LOA may not exceed 30 workdays each year and will be without loss of pay.	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>  This may be paid or unpaid.	PLA	<b>Worker's Comp</b>	WKC	Day AFTER last date worked (NOT last day in pay status)	Used when an employee is on a leave of absence due to worker's comp.  <i>Note: If the employee first used a different PLA they should be returned from that leave and placed on another PLA for this reason.</i>  Employees can simultaneously receive workers comp and federal FMLA.	Leave with Pay	Active	Leave with Benefits	LOA
<b>Leave of Absence</b>	LOA	<b>Unpaid LOA Legislature Only</b>	ULA		<b>To be used by Legislature ONLY.</b>	Leave of Absence	Active	LOA	LOA



## Pay Rate Change

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Pay Rate Change	PAY	Add-on or Supplemental	ADD	Sunday, beginning of PP	Used when an add-on or supplemental pay comp rate code is added or removed on an employee's job data record.	Active	Active	Active	PAY
Pay Rate Change	PAY	Administrative Adjustment	ADM	Sunday, beginning of PP	<p><i>DPM Bureau of Classification and Compensation must be notified when using this Action/Reason.</i></p> <p>Used for comp rate changes not covered under another action reason.</p> <p><b>For example:</b> The annual salary increase for a fixed term unclassified employee that was identified upon appointment.</p> <p><i>Note: DO NOT add a row or use this action/reason to correct an error from a previous job row. If there was an entry error, create a ticket for correction.</i></p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Career Exec Downward Movement	CED	Sunday, beginning of PP	<p>Used when a career executive employee's comp rate changes due to a downward movement.</p> <p>This row is added after the personnel transaction (transfer/career executive downward movement) row.</p> <p><i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i></p> <p>See <a href="#">Personnel Transactions - Order of Operations</a></p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Career Exec Lateral Movement	CEL	Sunday, beginning of PP	<p>Used when a career executive employee's comp rate changes due to a lateral movement.</p> <p>This row is added after the personnel transaction (transfer/career executive lateral movement) row.</p> <p><i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i></p> <p>See <a href="#">Personnel Transactions - Order of Operations</a></p>	Active	Active	Active	PAY

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Pay Rate Change	PAY	Career Exec Upward Movement	CEU	Sunday, beginning of PP	<p>Used when a career executive employee's comp rate changes due to an upward movement.</p> <p>This row is added after the personnel transaction (transfer/career executive upward movement) row.</p> <p><i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i></p> <p><b>See <u>Personnel Transactions - Order of Operations</u></b></p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Comp Plan Adjust - Restoration	CPR	Sunday, beginning of PP in which the employee is Restored	<p>Used when an employee is restored and their comp rate is discretionarily changed under the provisions of Section I.4.08(2) of the Compensation Plan.</p> <p>This pay rate change would be entered after any intervening adjustments are entered (GWA, Market, Pay Progression, etc.)</p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Contractual Adj Restoration	CAR	Sunday, beginning of PP in which the employee is Restored	Used when an employee is restored and their comp rate is changed due to contract adjustments that have taken place while they were on the unpaid leave.	Active	Active	Active	PAY
Pay Rate Change	PAY	Contractual Pay Progression	CPP	Sunday, beginning of PP	Used when an employee's comp rate changes due to a periodic pay progression adjustment under the terms of a collective bargaining agreement.	Active	Active	Active	PAY
Pay Rate Change	PAY	Contractual Wage Adjustment	CBA	Sunday, beginning of PP	Used for comp rate changes that are a result of collective bargaining, not including automatic pay progressions (see contractual pay progression). Similar to GWAs and market adjustments used for non-represented employees.	Active	Active	Active	PAY

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Pay Rate Change	PAY	Demotion	DEM	Sunday, beginning of PP	<p>Used when an employee's comp rate changes as a result of a demotion.</p> <p>This row is added after the personnel transaction (demotion) row.</p> <p><i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i></p> <p>See <a href="#">Personnel Transactions - Order of Operations</a></p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Equity	EQU	Sunday, beginning of PP	Used for base-building DERAs received for equity.	Active	Active	Active	PAY
Pay Rate Change	PAY	General Wage Adjustment	GWA	Sunday, beginning of PP	<p>Used for comp rate changes that are a result of nonrepresented general wage adjustments (GWA) as provided for in the compensation plan.</p> <p>This should only be entered by agencies if the employees pay pate change wasn't loaded by DPM Enterprise HRIS Operations/Central Payroll.</p> <p><b>For example:</b> If the employee was on an unpaid LOA during the time of the GWA, the agency should enter this row effective the Sunday of the beginning of the PP in which the employee returned from the unpaid leave so when the RFL is added their comp rate is updated accordingly.</p> <p>See <a href="#">Return From Leave - Order of Operations</a></p>	Active	Active	Active	PAY
Pay Rate Change	PAY	LTE Pay Adjustment	LTE	Sunday, beginning of PP	<p>Used for comp rate changes to a current LTE appointment. This is not used for a new appointment as the comp rate would be included on the hire, rehire, or transfer – new LTE appointment row.</p> <p>LTEs in both broadband and non-broadband (non Schedule 18) may receive pay increases in the same appointment up to the minimum of the range. For Schedule 18 classifications they may receive pay increases up to the maximum of the range. LTEs paid above the range minimums may receive an increase in special situations defined at Section D – 3.05 of the Comp Plan.</p>	Active	Active	Active	PAY

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Pay Rate Change	PAY	Market or Parity Adjustment 1	MP1	Sunday, beginning of PP	Used when an employee's comp rate is changed due to a market/parity adjustment.	Active	Active	Active	PAY
Pay Rate Change	PAY	Market or Parity Adjustment 2	MP2	Sunday, beginning of PP	Used when an employee's comp rate is changed due to a 2 <sup>nd</sup> market/parity adjustment on the same date as the 1 <sup>st</sup> market/parity adjustment.	Active	Active	Active	PAY
Pay Rate Change	PAY	Merit	MER	Sunday, beginning of PP	Used for base-building DMCs.	Active	Active	Active	PAY
Pay Rate Change	PAY	Pay Progression	PRG	Sunday, beginning of PP	Used for comp rate changes as the result of a pay progression for nonrepresented employees. Pay progressions for represented employees use contractual pay progression.	Active	Active	Active	PAY
Pay Rate Change	PAY	Promotion	PRO	Sunday, beginning of PP	Used when an employee's comp rate changes as a result of a promotion.  This row is added after the personnel transaction (promotion) row.  <i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i>  <u>See Personnel Transactions - Order of Operations</u>	Active	Active	Active	PAY
Pay Rate Change	PAY	Raised Minimum Rate	RMR	Sunday, beginning of PP	Used when an employee's base pay rate is permanently adjusted due to the implementation of a raised minimum rate (RMR).	Active	Active	Active	PAY
Pay Rate Change	PAY	Regrade due to Reallocation	REA	Sunday, beginning of PP	Used if an employee is regraded when their position is reallocated and their comp rate changes.  This row is added after the position change request has processed and the position change/job reallocation row is pushed to job data.  LTE pay rate changes should never be processed with this action/reason.  <i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i>  <u>See Personnel Transactions - Order of Operations</u>	Active	Active	Active	PAY

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Pay Rate Change	PAY	Regrade due to Reclass	REC	Sunday, beginning of PP	<p>Used if an employee is regraded when their position is reclassified and their comp rate change as a result.</p> <p>This row is added after the position change request has processed and the position change/job reclassification row is pushed to the incumbent's job data.</p> <p>LTE pay rate changes should never be processed with this action/reason.</p> <p><i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i></p> <p>See <a href="#">Personnel Transactions - Order of Operations</a></p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Reinstatement	REI	Sunday, beginning of PP	<p>Used when an employee's comp rate is changed due to a reinstatement.</p> <p>This row is added after the personnel transaction (hire, rehire, transfer, etc.) row.</p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Retention	RET	Sunday, beginning of PP	<p>Used for base-building DERAs received for retention.</p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Return to Level	RTL	Sunday, beginning of PP	<p>Used when an employee transfers, promotes, or is reclassified or reallocated to a higher pay range <b>and</b> is eligible for Return to Previous Level, as defined at Section I 3.00 of the Comp Plan.</p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Trades Vacation/Pay Election	TVS	01/01/YYYY	<p>Used when building trades employees make their annual salary and vacation plan election.</p>	Active	Active	Active	PAY
Pay Rate Change	PAY	Transfer	XFR	Sunday, beginning of PP	<p>Used when an employee's comp rate changes as a result of a transfer into a position for which a comp rate change <b>has been approved by the Bureau of Classification and Compensation.</b></p> <p>This row is added after the personnel transaction (transfer) row.</p> <p><i>Note: Requires separate sequenced absence eligibility change and/or benefits eligibility change job data rows if applicable.</i></p> <p>See <a href="#">Personnel Transactions - Order of Operations</a></p>	Active	Active	Active	PAY

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<b>Action Description</b>	<b>Action Code</b>	<b>Reason Description</b>	<b>Reason Code</b>	<b>Effective Date to Use</b>	<b>Use Explanation</b>	<b>Payroll Status</b>	<b>HR Status</b>	<b>Benefit Status</b>	<b>BAS Action</b>
Pay Rate Change	PAY	Courts-Acting Assignment	ACT		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Certification Exam	CER		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Chg to Judicial Rate	JUD		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Exceptional Merit	EMA		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Experience Credit Adj	ECA		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Longevity	LON		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Merit 1	MA1		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Courts-Merit 2	MA2		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Court Reporter Step Increase	STP		<i>To be used by Courts ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Increase - Legislature Only	INC		<i>To be used by Legislature ONLY.</i>	Active	Active	Active	PAY
Pay Rate Change	PAY	Top of Range - Legislature Only	TOR		<i>To be used by Legislature ONLY.</i>	Active	Active	Active	PAY

## Promotion

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are still required.</b>									
Transfer	XFR	Promotion Between Agencies	PBA	Sunday, beginning of PP	Used for the personnel transaction of a promotion between agencies. Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	PRO
Transfer	XFR	Promotion Within Agency	PWA	Sunday, beginning of PP	Used for the personnel transaction of a promotion within agencies. Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	PRO
<i>Remember: Promotions can only occur for Permanent/Classified Employees &amp; cannot be used for LTE's, Project/Project, or Unclassified.                      Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions.                      See <a href="#">Personnel Transactions - Order of Operations</a> and <a href="#">Personnel Transaction Scenarios</a></i>									

## Recall From Layoff

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Recall From Layoff	REC	Recall from Layoff	REC	Sunday, beginning of PP in which the employee returns to work	Used when employees who are on a seasonal or temporary layoff return from the layoff.  <i>Note: This is not used to return employees who are part of a permanent layoff (termination/layoff). A rehire action is used instead.</i>	Active	Active	Active	REC

## Rehire

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.</b>									
Rehire	REH	Original Appointment No WRS	NWR	See Below	<p>Used for rehiring former employees without reinstatement eligibility, who are more than 30 days past their last termination date, are not coming from an affiliate, are considered original hires under ER-MRS 1.02, and have no prior WRS (either have never been covered by the WRS or have taken a separation benefit and no longer have any WRS service). This action reason should be used regardless of the empl class (LTE, PPR, PRJ, PRM, ULC, etc.)</p> <p>New comp rate, tax location, empl class and other job data updates are captured on this job row. Review/update absence eligibility, benefits eligibility, benefits service date and company seniority date and make updates as needed.</p> <p>If the employee is WRS-eligible, this action will open a HIR event in eBenefits. The benefits service date on the employment data page on job data must be correct when the HIR event prepares to ensure employee's eligibility for the employer contribution towards health insurance is determined correctly.</p> <p>This action/reason does NOT drive the employee's eligibility for the employer contribution towards health insurance - the benefits service date on the job data - employment data page does.</p>	Active	Active	Active	HIR
<p><i>Note: If the benefit eligibility fields or benefits service date are not correct when entered, submit a ticket for correction. The HIR event will not prepare correctly if the information is wrong.</i></p>									
<p><b>Effective Date to Use:</b></p> <ul style="list-style-type: none"> <li>• All rehires <b>following a break in service of more than one (1) full pay period</b> are effective when the employee reports to work.</li> <li>• Rehires <b>with a break of less than one (1) full pay period</b> should be effective the Sunday, beginning of PP.</li> </ul>									
<b>Rehire Action Continued on Next Page</b>									



### Rehire Action Continued from Previous Page

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.									
<b>Rehire</b>	REH	<b>Original Appointment Prior WRS</b>	PWR	See Below	<p>Used for rehiring former employees without reinstatement eligibility, who are more than 30 days past their last termination date, are not coming from an affiliate, are considered original hires under ER-MRS 1.02, and have prior WRS service (they have NOT taken a separation benefit). This action reason should be used regardless of the empl class (LTE, PPR, PRJ, PRM, ULC, etc.)</p> <p>New comp rate, tax location, empl class and other job data updates are captured on this job row. Review/update absence eligibility, benefits eligibility, benefits service date and company seniority date and make updates as needed.</p> <p>If the employee is WRS-eligible, this job action will open a HIR event in eBenefits. The benefits service date on the employment data page on job data must be correct when the HIR event prepares to ensure employee's eligibility for the employer contribution towards health insurance is determined correctly.</p> <p>This action/reason does NOT drive the employee's eligibility for the employer contribution towards health insurance - the benefits service date does.</p>	Active	Active	Active	HIR
Note: If the benefit eligibility fields or benefits service date are not correct when entered, submit a ticket for correction. The REH event will not prepare correctly if the information is wrong.									
<b>Rehire</b>	REH	<b>Rehire within 30 days</b>	R30	See Below	<p>Used when rehiring an employee who terminated less than 30 days ago. This could be considered a restoration, reinstatement, or original appointment but <u>NO benefit event will be triggered.</u></p> <p>eBenefits does NOT open to employee - all benefits must be entered manually by Benefits Specialist on the HFA event.</p> <p>New comp rate, tax location, empl class and other job data updates are captured on this job row. Review/update absence eligibility, benefits eligibility, benefits service date and company seniority date and make updates as needed.</p>	Active	Active	Active	HFA
<b>Effective Date to Use:</b> <ul style="list-style-type: none"> <li>All rehires <b>following a break in service of more than one (1) full pay period</b> are effective when the employee reports to work.</li> <li>Rehires <b>with a break of less than one (1) full pay period</b> should be effective the Sunday, beginning of PP.</li> </ul>									
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## Rehire Action Continued from Previous Page

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.</b>									
<b>Rehire</b>	REH	<b>Rehire from Affiliate</b>	RAF	See Below	<p>Used to rehire a former employee who is coming back with NO break in service from another state payroll center (UW; UWH&amp;C; Wisconsin Housing and Economic Development Authority (WHEDA); Fox River Navigational Systems Authority (FRNSA); Wisconsin Economic Development Corporation (WEDC); Wisconsin Health and Educational Facilities Authority (WHEFA); and there should be no lapse in benefits, or when the employee is moving between companies (WIS, LEG, COURTS).) and there should be no lapse in benefits, or when an employee is approved for an LOA to fill either a project or unclassified appointment. This could be considered a restoration, reinstatement, or original appointment but <u>NO benefit event will be triggered</u>.</p> <p>New comp rate, tax location, empl class and other job data updates are captured on this job row. Review/update absence eligibility, benefits eligibility, benefits service date and company seniority date and make updates as needed.</p> <p>eBenefits does NOT open to employee - all benefits must be entered manually by Benefits Specialist on the HFA event.</p> <p><i>Note: Agency may not know Benefits Elg Fld 2 value (ICI eligibility). If correction needed after HFA entered, create a ticket.</i></p>	Active	Active	Active	HFA
<b>Rehire</b>	REH	<b>Reinstatement</b>	REI	See Below	<p>Used when rehiring a former employee at their previous classification level or lower within the eligible timeframe. This could be after a layoff or an appointment made under s. 230.33. There must be a greater than 30-day break in employment and they cannot be coming from an affiliate.</p> <p>New comp rate, tax location, empl class and other job data updates are captured on this job row. Review/update absence eligibility, benefits eligibility, benefits service date and company seniority date and make updates as needed.</p> <p>If the employee is WRS Eligible, this action will open a hire event in eBenefits.</p>	Active	Active	Active	HIR
<b>Effective Date to Use:</b> <ul style="list-style-type: none"> <li>All rehires <b>following a break in service of more than one (1) full pay period</b> are effective when the employee reports to work.</li> <li>Rehires <b>with a break of less than one (1) full pay period</b> should be effective the Sunday, beginning of PP.</li> </ul>									

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.</b>									
<b>Rehire</b>	REH	<b>Restoration</b>	RES	See Below	<p>Used when an employee who has restoration rights under ER-MRS 16.03(3) is rehired. There must be a greater than 30-day break in employment and they cannot be coming from an affiliate.</p> <p>The comp rate on this row should be set to employee's former rate, without intervening adjustments. If intervening adjustments are then needed, additional pay rate change row(s) must be added.</p> <p>All job data updates are captured on this job row. Review/update absence eligibility, benefits eligibility, benefits service date and company seniority date and make updates as needed.</p> <p>If the employee is WRS eligible, this action/reason will open a hire event in eBenefits.</p>	Active	Active	Active	HIR

**Effective Date to Use:**

- All rehires **following a break in service of more than one (1) full pay period** are effective when the employee reports to work.
- Rehires **with a break of less than one (1) full pay period** should be effective the Sunday, beginning of PP.

## Retirement

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Retirement	RET	Disability Retirement	DIS	Day AFTER last date worked	Used when medical criteria are met for an employee to retire due to a disability. The eligibility determination is made through a third party.	Retired	Inactive	Retired	RET
Retirement	RET	Retirement	RET	Day AFTER last date worked	Used when an employee retires from state service. <i>'Retirement' is treated differently than 'Termination' for reporting. Sick leave balance sent to ETF so annuitant health insurance can be established.</i>	Retired	Inactive	Retired	RET
Retirement	RET	Retirement In Lieu of Layoff	ILL	Day AFTER last date worked	Used when an employee chooses to retire in lieu of permanent layoff.  Creates a termed with benefits event so health insurance can continue for 3 additional months while the employee remains eligible for the employer contribution towards health insurance. Agency must collect employee premiums prior to termination.  Once active health insurance ends, must add Termination/End benefits row effective 1 <sup>st</sup> of month health no longer active.	Retired	Inactive	Retired With Benefits	TWB

## Return From Leave

[See Return From Leave - Order of Operations](#)

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Return From Leave	RFL	Return From Leave	RFL	See Below	Used when an employee returns from either an unpaid or paid leave of absence.  Intervening pay rate changes must be entered separately based on the pay rate change reason(s).	Active	Active	Active	RFL

### Effective Date to Use:

- Effective the day the employee returns from leave
- Intervening pay rate changes are effective the Sunday, the beginning of the PP in which the employee is returning.

### Terminated With Benefits

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Terminated With Benefits</b>	TWB	<b>Appeal</b>	APP	Day AFTER last date worked	Used when an employee is appealing their termination. Allows the employee to maintain health insurance during appeal. Employee must continue to pay required premiums.	Terminated	Active	Terminated with Benefits	TWB
<b>Terminated With Benefits</b>	TWB	<b>Invol-Loss of Apptmnt</b>	LSA	Day AFTER last date worked	Used to term employees whose appointments end due to their appointing authorities' end of appointment due to resignation, retirement, or loss of election.  Elected officials who lose an election and are not being reappointed would use Termination/ Loss of Election.	Terminated	Active	Terminated with Benefits	TWB
<b>Terminated With Benefits</b>	TWB	<b>Layoff</b>	LAY	Day AFTER last date worked	Per 230.34(2) - Used when an employee with permanent status in class is laid off. This is NOT used for seasonal or temporary layoff.  Allows the employee to maintain health insurance during layoff.  Actual termination action must be entered to complete the termination. See termination/end benefits.	Terminated	Active	Terminated with Benefits	TWB

### Termination

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>Termination</b>	TER	<b>Accepted Offer - Did Not Start</b>	DNS	Effective the same as the hire	Used to terminate an employee when they accepted an offer and did not start and the hire has been entered into PeopleSoft.	Terminated	Inactive	Terminated	TER
<b>Termination</b>	TER	<b>Death</b>	DEA	Effective the day AFTER the employee's death	Used when an employee dies while they are a current employee.	Deceased	Deceased	Deceased	DEA
<b>Termination</b>	TER	<b>Discharge - Probation</b>	DPR	Day AFTER last date worked	Used when an employee is terminated during their probationary period.  This should not be used on LTE or Project/Project employees.	Terminated	Inactive	Terminated	TER

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Termination	TER	End Benefits	EBN	Effective the 1st of the month in which the employee no longer has active health insurance.	Used to end health insurance for former employees who maintained active health insurance due to layoff or appeal (where termed with a terminated with benefits action).	Terminated	Inactive	Terminated	TER
Termination	TER	End Job (Continue in Othr Job)	EJB	Day AFTER last date worked	Used when an employee has multiple active employment instances, and one terms but the other(s) remain active. This prevents benefits from being terminated.  Should also be used when an employee is moving between companies (WIS, COURTS, LEG). A new employment instance is required for the new appointment/hire. The existing instance should be termed with this Action/Reason to prevent benefits from being terminated. This action maps to a DTA event instead of a TER event to keep benefits active.  Use Termination/Transfer to Affiliate when employee is moving to another state payroll center.	Terminated	Inactive	Active	DTA
Termination	TER	End LTE Appointment	ELA	Effective the day after the last day worked if the employee does NOT have a successive LTE Appointment.	Used to terminate LTEs when their appointment ends (or have reached their hours limit) and the employee does NOT have a successive LTE appointment.  See <a href="#">Personnel Transaction Scenarios</a> for further instruction if the employee DOES have a successive appointment.	Terminated	Inactive	Terminated	TER
Termination	TER	Release LTE	RLT	Day AFTER last date worked	Used to release an LTE prior to their appointment end date.	Terminated	Inactive	Terminated	TER

**Termination Action Continued on Next Page**

**Termination Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Termination	TER	End Project Appointment	EPA	Effective the day after the last day worked if the employee does NOT have a successive Project Appointment.	Used to terminate project employees when their appointment ends if the employee does NOT have a successive project appointment.  See <a href="#">Personnel Transaction Scenarios</a> for further instruction if the employee DOES have a successive appointment.	Terminated	Inactive	Terminated	TER
Termination	TER	End Unclassified Appointment	EUA	Day AFTER last date worked	Used to terminate unclassified employees when their appointment ends. This could be a fixed term appointment or when the incumbent is not reappointed to their unclassified appointment.  See <a href="#">Personnel Transaction Scenarios</a> for further instruction if the employee DOES have a successive appointment.	Terminated	Inactive	Terminated	TER
Termination	TER	Job Abandonment	JOB	Day AFTER last date worked	Used to terminate an employee due to job abandonment.	Terminated	Inactive	Terminated	TER
Termination	TER	Loss of Election	LOE	Day AFTER last date worked	Used when incumbent themselves loses an election.  Subordinates of elected officials who lose an election that are not being reappointed would use Terminated with Benefits/Invol-Loss of Apptmnt.	Terminated	Inactive	Terminated	TER
Termination	TER	Misconduct	CON	Day AFTER last date worked	Used to terminate an employee due to misconduct.  This should not be used on LTE or Project/Project employees.	Terminated	Inactive	Terminated	TER
Termination	TER	Other Work Private	OWP	Day AFTER last date worked	Used to terminate an employee because they are leaving state service for a job in the private sector.	Terminated	Inactive	Terminated	TER
Termination	TER	Resignation	RES	Day AFTER last date worked	Used to terminate an employee due to resignation.  This can also be used on LTEs and Project/Projects if they resign prior to the end of their appointment.	Terminated	Inactive	Terminated	TER

**Termination Action Continued on Next Page**

**Termination Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Termination	TER	Staff Reduction	RED	Day AFTER last date worked	Used for LTE, project, and probationary (original) employees in a layoff group that are not eligible for layoff or reinstatement eligibility.  This would also be used for to terminate unclassified employees not eligible for layoff as a result of their position being eliminated.	Terminated	Inactive	Terminated	TER
Termination	TER	Transfer to Affiliate	TAF	Day AFTER last date worked	Used when an employee is moving to another state payroll center (UW; UWH&C; Wisconsin Housing and Economic Development Authority (WHEDA); Fox River Navigational Systems Authority (FRNSA); Wisconsin Economic Development Corporation (WEDC); Wisconsin Health and Educational Facilities Authority (WHEFA)  This should NOT be used when employees are moving between companies (WIS, COURTS, LEG). Movement to a new company requires a new employment instance for the new appointment/hire. The existing instance should be termed with Termination/End Job Continue in Other Job action reason to prevent benefits from being terminated.	Terminated	Inactive	Terminated	TRA
Termination	TER	Unable to Perform Job Duties	PJD	Day AFTER last date worked	Used to terminate an employee when they are unable to perform the essential duties of their position. This is initiated by the employer.  <b>For example:</b> Employee is unfit for duty or for medical termination.	Terminated	Inactive	Terminated	TER
Termination	TER	Unsatisfactory Performance	UNS	Day AFTER last date worked	Used to terminate an employee due to unsatisfactory performance.	Terminated	Inactive	Terminated	TER

**Termination Action Continued on Next Page**



### Termination Action Continued from Previous Page

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
Termination	TER	Instance Added in Error	NST	Effective the same day as the Hire	<i>DPM Enterprise HRIS Operations use only.</i> Used for empl records created in error. Agencies must submit a JIRA Ticket requesting deletion of the record, and if deletion is not successful, DPM Enterprise HRIS Operations will add this termination row.	Terminated	Inactive	Terminated	TER
Termination	TER	Courts - End Personal Appt	PAE		<i>To be used by Courts ONLY.</i>	Terminated	Inactive	Terminated	TER
Termination	TER	Courts-End Reserve Judge Appt	RSJ		<i>To be used by Courts ONLY.</i>	Terminated	Inactive	Terminated	TER
Termination	TER	Discharge-Legis Only	DSC		<i>To be used by Legislature ONLY</i>	Terminated	Inactive	Terminated	TER

### Transfer Movements of Permanent Employees Between Positions

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
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**If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are still required.**

Transfer	XFR	Transfer Between Agencies	BEA	Sunday, beginning of PP	Used for the personnel transaction of transfer between agencies.  A job change request may need to be processed prior to the receiving agency gaining security to the job record to enter the transfer/between agencies.  Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	XFR
Transfer	XFR	Transfer Within Agency	WIA	Sunday, beginning of PP	Used for the personnel transaction of transfer within an agency.  Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	XFR

*Remember: Transfers can only occur for Permanent/Classified Employees & cannot be used for LTE's, Project/Project, or Unclassified.*

*Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions.*

**See [Personnel Transactions - Order of Operations](#) and [Personnel Transaction Scenarios](#)**

### Transfer Action Continued on Next Page

### Transfer Action Continued from Previous Page

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are still required.									
Transfer	XFR	<b>Career Exec Downward Movement</b>	CED	Sunday, beginning of PP	Used for the personnel transaction of a career executive downward movement. Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	XFR
Transfer	XFR	<b>Career Exec Lateral Movement</b>	CEL	Sunday, beginning of PP	Used for the personnel transaction of a career executive lateral movement. Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	XFR
Transfer	XFR	<b>Career Exec Upward Movement</b>	CEU	Sunday, beginning of PP	Used for the personnel transaction of a career executive upward movement. Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	XFR
Transfer	XFR	<b>Career Executive Reassignment</b>	RCE	Sunday, beginning of PP	Used for the personnel transaction of a career executive reassignment. This transaction is considered involuntary. Tax location is captured on this row.  <i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i>	Active	Active	Active	XFR
Remember: Transfers can only occur for Permanent/Classified Employees & cannot be used for LTE's, Project/Project, or Unclassified. Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions. See <a href="#">Personnel Transactions - Order of Operations</a> and <a href="#">Personnel Transaction Scenarios</a>									
<h3 style="color: red;">Transfer Action Continued on Next Page</h3>									

**Transfer Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<p align="center"><b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are still required.</b></p>									
<b>Transfer</b>	XFR	<b>Involuntary Transfer</b>	INV	Sunday, beginning of PP	<p>Used for the personnel transaction of an involuntary transfer within an agency.</p> <p>Tax location is captured on this row.</p> <p><i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i></p>	Active	Active	Active	XFR
<b>Transfer</b>	XFR	<b>Original Appointment</b>	ORA	Sunday, beginning of PP	<p>Used for the personnel transaction of original appointment when an employee does not have permanent status in class and is being appointed to a new position as a result of competition. Use this regardless of the level of the new position.</p> <p>This is not used for employees who have reinstatement eligibility or restoration rights.</p> <p>Comp rate and tax location are captured on this row.</p> <p>Requires separate sequenced absence eligibility change, and/or benefits eligibility change job data rows if applicable.</p>	Active	Active	Active	XFR
<b>Transfer</b>	XFR	<b>Reinstatement</b>	REI	Sunday, beginning of PP	<p>Used for the personnel transaction of an active employee reinstating to a previously held pay schedule/pay range or counterpart. This action should be used regardless of the level of the reinstatement.</p> <p>Tax location is captured on this row.</p> <p><i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i></p>	Active	Active	Active	XFR
<p align="center"><i>Remember: Transfers can only occur for Permanent/Classified Employees &amp; cannot be used for LTE's, Project/Project, or Unclassified.</i></p> <p align="center"><i>Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions.</i></p> <p align="center">See <a href="#">Personnel Transactions - Order of Operations</a> and <a href="#">Error! Reference source not found.</a></p>									
<b>Transfer Action Continued on Next Page</b>									

**Transfer Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<p>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are still required.</p>									
<b>Transfer</b>	XFR	<b>Restoration</b>	RES	Sunday, beginning of PP	<p>Used for the personnel transaction of an active employee who is restored to a different position. This action should be used regardless of the level of the restoration.</p> <p>The comp rate on this row should be set to employee’s former rate, without intervening adjustments. If intervening adjustments are then needed, additional sequenced pay rate change rows should be added. (See Pay Rate Change/Comp Plan Adjustment – Restoration or /Contractual Adjustment – Restoration.)</p> <p>Tax location is captured on this row.</p> <p><i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i></p>	Active	Active	Active	XFR
<b>Transfer</b>	XFR	<b>Transfer in Lieu of Layoff</b>	TLL	Sunday, beginning of PP	<p>Used for the personnel transaction of transfer in lieu of layoff.</p> <p>Tax location is captured on this row.</p> <p><i>Note: Requires separate sequenced pay rate change, absence eligibility change, and/or benefits eligibility change job data rows if applicable.</i></p>	Active	Active	Active	XFR
<p align="center"><i>Remember: Transfers can only occur for Permanent/Classified Employees &amp; cannot be used for LTE's, Project/Project, or Unclassified.</i></p> <p align="center"><i>Note: DO NOT use an action of transfer/promotion/ demotion to move employees in or out of surplus positions.</i></p> <p align="center"><b>See Personnel Transactions - Order of Operations and Personnel Transaction Scenarios</b></p>									
<p align="center"><b>Transfer Action Continued on Next Page</b></p>									

## Transfer Movements of Non-Permanent Employees Between Positions

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
<b>If the employee is hired via a recruitment in TAM do not process the personnel transaction manually on job data. Use manage hires. Separate sequenced pay rate change, absence eligibility, and/or benefits eligibility rows are NOT required with these specific transactions.</b>									
Transfer	XFR	<b>New LTE Appointment</b>	TLA	Sunday, beginning of PP	Used when an employee ends one LTE appointment and immediately starts another LTE appointment. Tax location is captured on this row.  See <a href="#">Personnel Transaction Scenarios</a> for LTE moves to another LTE	Active	Active	Active	XFR
Transfer	XFR	<b>New Project Appt</b>	TPA	Sunday, beginning of PP	Used when an employee ends one project appointment and immediately starts another project appointment. Tax location is captured on this row.  See <a href="#">Personnel Transaction Scenarios</a> for project-project to project-project	Active	Active	Active	XFR
Transfer	XFR	<b>New Unclassified Appointment</b>	NUA	Sunday, beginning of PP	Used when an employee ends one unclassified appointment and immediately starts another unclassified appointment. Tax location is captured on this row.  See <a href="#">Personnel Transaction Scenarios</a> for unclassified moves to another unclassified	Active	Active	Active	XFR
<i>Note: You no longer need to Term and Rehire in these three situations  <a href="#">Personnel Transaction Scenarios</a> for more information</i>									
<b>Remember, any movement between Empl Classes requires a Term and Rehire.</b>									

## Position Change

↓ **Position Changes should be processed through the Position Change Request and never added directly to an incumbent's Job Data** ↓

State of Wisconsin (STAR) > Human Resources > Process > WI Position Requests > WI Position Request Home

**Payroll Status = Active   HR Status = Active   Benefit Status = Active   BAS Action = POS**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	New Position	NEW	Sunday, beginning of PP	Used when a new position is created.	X			X		X
Position Change	POS	Add Surplus	ASU	Sunday, beginning of PP	Used when a surplus position is created.	X			X		X
<p><i>Note: Every position should either have a New Position (NEW) or Add Surplus (ASU) row once on its history, but never more than once. Using NEW or ASU on an already existing position (even if inactive) will cause the Position Request Form process to fail. If reactivating an inactive position, use Position Status Change (STA).</i></p>											
Position Change	POS	Confidential Position Change	CPC	Sunday, beginning of PP	Used when the confidential position flag is changed.  <i>Note: If a position is flagged as confidential the position data and any associated incumbent's data will not be shared through any type of data request or interface.</i>		X	X	X	Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	

**Position Change Action Continued on Next Page**

**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
<b>Position Change</b>	POS	<b>FLSA Status Change</b>	FLS	Sunday, beginning of PP	<p>Used when a position's FLSA status is changed.</p> <p>DPM Bureau of Classification and Compensation review and approval may be required.</p> <p>Absence eligibility group and TRD workgroup should also be reviewed. If the absence eligibility field needs to be changed a separate job data row for data change/absence eligibility change must be entered to make the change.</p> <p>Attach documentation/approval when submitting a ticket for corrections to the FLSA status.</p>		X	X	X	X	
<b>Position Change</b>	POS	<b>FTE Change</b>	FTE	Sunday, beginning of PP	Used when a position's FTE is changed. Review if benefits eligibility changes as a result of FTE Change (use Data Change/Benefits Eligibility Config if any updates are needed)	X		X	X	X	
<b>Position Change</b>	POS	<b>Funding</b>	FND	Sunday, beginning of PP	Used when there are funding changes made to a position.	X		X	X	Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	

**Position Change Action Continued on Next Page**

**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	Job Reallocation	JRE	Sunday, beginning of PP	<p>Used when a filled position is reallocated.</p> <p>Requires separate pay rate change and/or absence eligibility change and/or benefits eligibility change sequenced job data rows on incumbent's job data, if applicable.</p> <p>Job code changes on vacant positions use classification change reason.</p> <p>Attach documentation/approval when submitting a ticket for corrections related to reallocations.</p> <p><b>See <u>Reclassification or Reallocation</u></b></p>		X	X		X	
Position Change	POS	Reallocation due to Survey	SUR	Sunday, beginning of PP	<p><b><i>DPM Bureau of Classification and Compensation use only.</i></b></p> <p>Used when a position changes as the result of a class and comp survey through BCC.</p> <p>Requires separate pay rate change and/or absence eligibility change and/or benefits eligibility change sequenced job data rows on incumbent's job data, if applicable.</p>		X	X		X	

**Position Change Action Continued on Next Page**



**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
<b>Position Change</b>	POS	<b>Job Reclassification</b>	JRC	Sunday, beginning of PP	<p>Used when a filled position is reclassified.</p> <p>Requires separate pay rate change and/or absence eligibility change and/or benefits eligibility change sequenced job data rows on incumbent's job data, if applicable.</p> <p>Job code changes on vacant positions use classification change reason.</p> <p>Attach documentation/approval when submitting a ticket for corrections related to reclassifications.</p> <p><u>See <b>Reclassification or Reallocation</b></u></p>		X	X		X	
<b>Position Change</b>	POS	<b>Classification</b>	CLA	Sunday, beginning of PP	<p>Used when the job code changes on a vacant position.</p> <p>Job code changes on filled positions use job reallocation OR job reclassification change reason.</p> <p><u>See <b>Filled Position Transfers instructions</b></u></p>		X	Only for filled position transfers	X	If used for filled position transfer	X

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	Title Change	TTL	Sunday, beginning of PP	Used when a position's job title is changed. Mainly used for working titles.  Official classification/job code changes use classification, reclassification, or reallocation change reasons.		X	X	X	X	
Position Change	POS	LTE Misc Class Plan Changes	LMC	Sunday, beginning of PP	Used for changes to an LTE position that would otherwise be reclassifications or reallocations for permanent/classified employees.  LTEs cannot be reallocated, so this reason is used to implement changes to these positions that are a result of class plan changes.		X	X		X	
Position Change	POS	Location Change	LOC	Sunday, beginning of PP	Used when a position's location code is changed.		X	X	X	X	
Position Change	POS	Max Headcount	HDC	Sunday, beginning of PP	Used when the position's max headcount is changed.  <i>Note: PeopleSoft HCM will not allow positions to be filled above the max headcount.</i>	X		X	X	Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	

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**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	Position Frozen	PFR	Sunday, beginning of PP	Used when a position is slated for inactivation but there is still an incumbent in the position.	X		X		Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	
Position Change	POS	Position Inactivated	INA		Used when a position is inactivated.  <i>Note: Incumbent(s) must be moved to a new position or terminated before using this.</i>  <i>Note: Once a position is inactivated, no additional position change requests will post to the position until the effective status is changed from inactive to active.</i>	X			X		X
Position Change	POS	Position Status Change	STA	Sunday, beginning of PP	Used when reactivating an inactive position.	X			X		X

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**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
<b>Position Change</b>	POS	<b>Position Type</b>	TYP	Sunday, beginning of PP	Used when the position type is changed.  <b>Position Types (Classified Indicator):</b> <ul style="list-style-type: none"> <li>• Appointed – Unclassified</li> <li>• Contractor</li> <li>• DMA Military Supervisor</li> <li>• Elected – Unclassified</li> <li>• Limited Term Employment</li> <li>• Other</li> <li>• Permanent – Classified</li> <li>• Project</li> <li>• Seasonal – Classified</li> <li>• Surplus - T, X, A, B, C, D, E, I</li> </ul>	X			X		X
<b>Position Change</b>	POS	<b>Reorganization</b>	REO	Sunday, beginning of PP	Used for mass position changes as the result of reorganizations approved under s. 15.02(3) and 15.02 (4) of State Statute.*	X		X	X	X	

\* Reorganization change reason: Those reorganizations are one or more of the following:

(a) creation or abolishment of a division, or the consolidation of divisions within an agency.

(b) expansion or contraction in the number of field operation units.

(c) creation, elimination of office, bureaus, or comparable subunits.

(d) transfer of an office, bureau or section which requires transfers between appropriations and (e) transfers of an office, bureau or subunit which does not require transfers between appropriations.

For reorganizations under (b), or (c) above, the approval letter from the Governor must be attached to the transaction.

For reorganizations under (c) and (d) an approval letter from the Department of Administration must be attached to the transaction.

For a reorganization under (e) the letter to the Department for information only must be attached to the transaction.

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
<b>Position Change</b>	POS	<b>Restructure</b>	RES	Sunday, beginning of PP	Less formal than a reorganization. Typically changing the HR department, either by itself or in conjunction with other data fields (e.x. reports to, location code, etc.) and doesn't require State Budget Office approval. Used when an individual position is being reassigned to a new place within the organization but is not part of a formal reorganization within the department.		X	X	X	X	
<b>Position Change</b>	POS	<b>Term Date</b>	TRM	Saturday, end of PP	Used when a position's term date is changed. This is not an employee's term date.	X		X		Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	

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**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	Transfer	XFR	Sunday, beginning of PP	<p>Used when a position is transferred to another agency as a result of legislative action. This would not be used for mass transfers such as reorganizations or restructures or to move employees between positions within the same agency.</p> <p>A job data row for the personnel transaction (transfer/between agencies) will be required to complete the move for filled positions.</p> <p><i>Note: Also requires separate pay rate change and/or absence eligibility change and/or benefits eligibility change sequenced job data rows on incumbent's job data, if applicable.</i></p>	X		X	X	X	
Position Change	POS	Union Change	UNI	Sunday, beginning of PP	<p>Used when a position's union code is changed.</p> <p><b>Union Codes:</b></p> <ul style="list-style-type: none"> <li>• WI Law Enforcement Represented</li> <li>• WI Law Enforcement Non-Represented</li> </ul>		X	X	X	X	

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Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	Update Dot-Line	UDL	Sunday, beginning of PP	Used to update the dot-line relationship of a position. This is a position number in which the position has a dot-line relationship with.  <i>Note: Dot-Line does not have any system functionality. This is for agency reporting purposes only.</i>		X	X	X	X	
Position Change	POS	Update Reports-To	RTC	Sunday, beginning of PP	Used when a position's reports-to is changed that is not a result of a formal reorganization or restructure.		X	X	X	X	
Position Change	POS	Update Supervisor Level	USL	Sunday, beginning of PP	Used to update the supervisor level of a position.  <b>Supervisor Levels:</b> <ul style="list-style-type: none"> <li>• Secretary/NonCabinet Agency Executive</li> <li>• Deputy Secretary or Equivalent</li> <li>• Assistant Deputy Secretary</li> <li>• Division Administrator</li> <li>• Deputy or Assistant Division Administrator</li> <li>• Bureau Manager including Warden/Institution Director</li> <li>• Deputy or Assistant Bureau Level</li> <li>• Section Level Manager</li> <li>• Unit Level Supervisor</li> <li>• Office Level Supervisor</li> <li>• Section Level or Program Level Supervisor</li> <li>• Direct Line or 1st Level Supervisor</li> <li>• Non Supervisor</li> </ul>		X	X	X	X	

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**Position Change Action Continued from Previous Page**

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	Courts - Career Progression	CPR		<i>To be used by Courts ONLY.</i>						
Position Change	POS	Courts - CJ Election	CJE		<i>To be used by Courts ONLY.</i>						



## Personnel Transaction Scenarios

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>Permanent Classified to Unclassified</b> (assumes immediate movement from one appointment to the next, <b>no approved LOA</b>)</p>	<p><b>Job Data Updates</b> 2 HR Transactions effective Sunday of the new pay period</p> <ol style="list-style-type: none"> <li>1. Termination/Resignation on Classified Appointment</li> <li>2. On same empl record, Rehire/Rehire Within 30 Days</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Delete TER event from BAS Activity Table prior to 5pm of the date of termination entry (otherwise benefits will be terminated)</li> <li>• Review Benefits Eligibility Fld 1 (WRS) and update as needed on Rehire row, do not update Elg Fld 2 (ICI eligibility)</li> <li>• Rehire row will create HFA event – confirm current elections are on event and finalize (benefits are continuous – no new enrollment opportunities)</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>
<p><b>Permanent Classified to Unclassified</b> (assumes immediate movement from one appointment to the next, <b>with an approved LOA</b>)</p>	<p><b>Job Data Updates</b> HR Transaction effective Sunday of the new pay period</p> <ol style="list-style-type: none"> <li>1. LOA/Filling Unclassified Position on Classified Appointment</li> <li>2. If you are moving the employee into a Surplus this should be done on a separate row using Data Change/Surplus</li> <li>3. Create a new Employment Instance using Hire/Hire From Affiliate to avoid opening benefit events</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Review Benefits Eligibility Fld 1 (WRS) and update as needed on Hire row, do not update Elg Fld 2 (ICI eligibility)</li> <li>• Hire row will create HFA event – confirm current elections are on event and finalize (benefits are continuous – no new enrollment opportunities)</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>
<p><b>Unclassified to Unclassified</b> (assumes immediate movement from one appointment to the next)</p>	<p><b>Job Data Updates</b></p> <ol style="list-style-type: none"> <li>1. Transfer/New Unclassified Appointment</li> </ol> <p><b>Note:</b> This is replacing the past practice of terming and rehiring an employee in this situation.</p>

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>Unclassified to Permanent Classified</b> (assumes immediate movement from one appointment to the next)</p>	<p><b>Job Data Updates</b> 2 HR Transactions effective Sunday of the new pay period</p> <ol style="list-style-type: none"> <li>1. Termination/Resignation on Unclassified Appointment</li> <li>2. On same empl record, Rehire/Rehire Within 30 Days</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Delete TER event from BAS Activity Table prior to 5pm of the date of termination entry (otherwise benefits will be terminated)</li> <li>• Review Benefits Eligibility Fld 1 (WRS) and update as needed on Rehire row, do not update Elg Fld 2 (ICI eligibility)</li> <li>• Rehire row will create HFA event – confirm current elections are on event and finalize (benefits are continuous – no new enrollment opportunities)</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>
<p><b>Project to Permanent Classified</b> (when the employee is hired within 30 days of their resignation; assumes Project covered by WRS)</p> <p><b>Note:</b> If Project not covered WRS, follow steps in <a href="#"><u>LTE (who is not enrolled in the WRS) to Permanent Classified, Unclassified, or Project.</u></a></p> <p>Also see <a href="#"><u>ER 18.05 Admin Code</u></a> for rules related to Project Employees</p>	<p><b>Job Data Updates</b> 2 HR Transactions effective Sunday of the new pay period</p> <ol style="list-style-type: none"> <li>1. Termination/Resignation on Project Appointment</li> <li>2. On same empl record, Rehire/Rehire Within 30 Days</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Delete TER event from BAS Activity Table prior to 5pm of the date of termination entry (otherwise benefits will be terminated)</li> <li>• Review Benefits Eligibility Fld 1 (WRS) and update as needed on Rehire row</li> <li>• If employee never attained permanent status and <u>is enrolled in ICI category 2 or 3</u>, the employee must be moved to Category 1 effective the 1<sup>st</sup> of the month following the change. Add a Data Change/Benefits Eligibility Config job row effective the deduction begin date associated with the coverage change, update the value of Elg Fld 1 to Cat 1 and use the ELG event to enroll the employee in Cat 1 ICI coverage. If already enrolled in Cat 1 ICI, no updates are needed.</li> <li>• If employee previously had permanent status and/or is not enrolled in ICI, no update to Elg Fld 2 are needed.</li> <li>• Rehire row will create HFA event – confirm current elections are on event and finalize (benefits are continuous – no new enrollment opportunities)</li> <li>• Review/update time reporter data and absence eligibility</li> <li>• Update company seniority date if applicable</li> </ul> <p>If the employee has previously been in a permanent classified or non-LTE unclassified appointment continuous service and unused leave credits can flow through project appointments and back into a permanent classified or unclassified appointment on the same basis as if the project appointments were permanent appointments. This includes consideration of whether an employee absent for more than five years must start over for continuous service and sick leave accrual.</p> <p>If the person has <u>not</u> previously been in a permanent classified or non-LTE unclassified appointment, then neither continuous service nor unused leave credits can transfer to a subsequent project or permanent appointment. In this case, the employee “starts over” with each new appointment.</p>

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>Permanent Classified or Unclassified to Project</b>                      (when there is <b>no approved LOA</b> (from Classified appointment) and the employee is rehired within 30 days of their resignation)</p> <p>Also see <a href="#">ER 18.05 Admin Code</a> for rules related to Project Employees</p>	<p>Movement depends on if the employee is eligible to keep their continuous service.</p> <ul style="list-style-type: none"> <li>• If not eligible to keep continuous service:                             <ul style="list-style-type: none"> <li>2 HR Transactions                                     <ul style="list-style-type: none"> <li>○ Termination/Resignation on Permanent/Unclassified Appointment</li> <li>○ On same empl record, Rehire/Rehire Within 30 Days</li> <li>○ Effective date is Sunday of beginning of pay period (<u>adjust company seniority date</u>)</li> <li>○ Update Empl Class, Comp Rate, etc. on Rehire row</li> </ul> </li> </ul> </li> <li>• If eligible to keep continuous service:                             <ul style="list-style-type: none"> <li>2 HR Transactions                                     <ul style="list-style-type: none"> <li>○ Termination/Resignation on Permanent/Unclassified Appointment</li> <li>○ On same empl record, Rehire/Rehire Within 30 Days</li> <li>○ Effective date is Sunday of beginning of pay period (<u>do NOT adjust company seniority date</u>)</li> <li>○ Update Empl Class, Comp Rate, etc. on Rehire row</li> </ul> </li> </ul> </li> </ul> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• If any updates are needed to Elg Flds values, add an effective sequenced row to Job with an action reason of Data Change/Benefits Eligibility Config and update the applicable values. ICI eligibility does not change in this situation so do not update Elg Fld 2.</li> <li>• Review/update time reporter data and absence eligibility</li> </ul> <p>If the employee has previously been in a permanent classified or non-LTE unclassified appointment continuous service and unused leave credits can flow through project appointments and back into a permanent classified or unclassified appointment on the same basis as if the project appointments were permanent appointments. This includes consideration of whether an employee absent for more than five years must start over for continuous service and sick leave accrual.</p> <p>If the person has <u>not</u> previously been in a permanent classified or non-LTE unclassified appointment, then neither continuous service nor unused leave credits can transfer to a subsequent project or permanent appointment. In this case, the employee “starts over” with each new appointment.</p>

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>Permanent Classified to Project</b> (when there is an approved LOA and the employee is rehired within 30 days of their resignation)</p> <p>Also see <a href="#">ER 18.05 Admin Code</a> for rules related to Project Employees</p>	<p>Movement depends on if the employee is eligible to keep their continuous service.</p> <ul style="list-style-type: none"> <li>• If not eligible to keep continuous service:           <ul style="list-style-type: none"> <li>HR Transactions               <ul style="list-style-type: none"> <li>○ Effective date is Sunday of beginning of pay period</li> <li>○ LOA/Filling Project Appointment on Permanent Appointment</li> <li>○ If you are putting them into a surplus position this should be done on a separate row using Data Change/Surplus</li> <li>○ Create a new Employment Instance using Hire/Hire From Affiliate to avoid new benefit events</li> <li>○ Update Empl Class, Comp Rate, company seniority date, etc. on Hire row</li> </ul> </li> </ul> </li> <li>• If eligible to keep continuous service:           <ul style="list-style-type: none"> <li>HR Transactions               <ul style="list-style-type: none"> <li>○ Effective date is Sunday of beginning of pay period</li> <li>○ LOA/Filling Project Appointment on Permanent Appointment</li> <li>○ If you are putting them into a surplus position this should be done on a separate row using Data Change/Surplus</li> <li>○ Create a new Employment Instance using Hire/Hire From Affiliate to avoid new benefit events</li> <li>○ <b><u>Do NOT adjust company seniority date</u></b></li> <li>○ Update Empl Class, Comp Rate, etc. on Hire row</li> </ul> </li> </ul> </li> </ul> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• If any updates are needed to Elg Flds values, add an effective sequenced row to Job with an action reason of Data Change/Benefits Eligibility Config and update the applicable values. ICI eligibility does not change in this situation so do not update Elg Fld 2.</li> <li>• Review/update time reporter data and absence eligibility</li> </ul> <p>If the employee has previously been in a permanent classified or non-LTE unclassified appointment continuous service and unused leave credits can flow through project appointments and back into a permanent classified or unclassified appointment on the same basis as if the project appointments were permanent appointments. This includes consideration of whether an employee absent for more than five years must start over for continuous service and sick leave accrual.</p> <p>If the person has <u>not</u> previously been in a permanent classified or non-LTE unclassified appointment, then neither continuous service nor unused leave credits can transfer to a subsequent project or permanent appointment. In this case, the employee “starts over” with each new appointment.</p>

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>Project to Project</b> (when the employee is rehired within 30 days of their resignation/end of project appointment)</p> <p>Also see <a href="#">ER 18.05 Admin Code</a> for rules related to Project Employees</p>	<p>Movement depends on if the employee is eligible to keep their continuous service.</p> <ul style="list-style-type: none"> <li>• If not eligible to keep continuous service: <ul style="list-style-type: none"> <li>○ Action Reason = Transfer/New Project Appointment</li> <li>○ Effective date is Sunday of beginning of pay period (<u>adjust company seniority date</u>)</li> <li>○ Pay rate change should be on transfer row</li> </ul> </li> <li>• If eligible to keep continuous service: <ul style="list-style-type: none"> <li>○ Action Reason = Transfer/New Project Appointment</li> <li>○ Effective date is Sunday of beginning of a pay period (<u>do NOT adjust company seniority date</u>)</li> <li>○ Pay rate change should be on transfer row</li> </ul> </li> </ul> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• If employee never attained permanent status and is enrolled in ICI category 2 or 3, the employee must be moved to Category 1 effective the 1<sup>st</sup> of the month following the change. Add a Data Change/Benefits Eligibility Config job row effective the deduction begin date associated with the coverage change, update the value of Elg Fld 1 to Cat 1 and use the ELG event to enroll the employee in Cat 1 ICI coverage. If already enrolled in Cat 1 ICI, no updates are needed.</li> <li>• If employee previously had permanent status and/or is not enrolled in ICI, no updates to Elg Fld 2 are needed.</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>
<p><b>Permanent Classified, Unclassified, or Project* to LTE</b> (when the employee is rehired within 30 days of their resignation)</p> <p>*assumes Project covered under the WRS</p>	<p><b>Job Data Updates</b></p> <p>2 HR Transactions</p> <ol style="list-style-type: none"> <li>1. Termination/Resignation on Permanent/Unclassified/Project Appointment</li> <li>2. On same empl record, Rehire/Rehire Within 30 Days</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Delete TER event from BAS Activity Table prior to 5pm of the date of termination entry (otherwise benefits will be terminated)</li> <li>• Review Benefits Eligibility Fld 1 (WRS) and update as needed on Rehire row, update Elg Fld 3 to identify if now eligible for ½ time or full-time health insurance premiums</li> <li>• If enrolled in ICI, if in a permanent plateau (Cat 4, 5, or 6), do not update Elg Fld 2 – can keep current ICI coverage. If enrolled in Cat 2 or 3, update Elg Fld 2 to Cat 1. If enrolled in Cat 1, no update needed.</li> <li>• Rehire row will create HFA event – confirm current elections are on event and finalize (benefits are continuous – no new enrollment opportunities)</li> <li>• If employee wants to cancel benefits, will need to submit an application and entry must be done on a CAN event. No longer eligible for Healthcare FSA or Dependent Day Care FSA.</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>LTE (who is enrolled in the WRS) to Permanent Classified, Unclassified, or Project</b> (when the employee is rehired within 30 days of their LTE termination)</p>	<p><b>Job Data Updates</b> 2 HR Transactions</p> <ol style="list-style-type: none"> <li>1. Termination/End LTE Appointment</li> <li>2. On same empl record, Rehire/Rehire Within 30 days</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Delete TER event from BAS Activity Table prior to 5pm of the date of termination entry (otherwise benefits will be terminated)</li> <li>• Review Benefits Eligibility Fld 1 (WRS) and update as needed on Rehire row, do not update Elg Fld 2, remove value from Elg Fld 3</li> <li>• Rehire row will create HFA event. If newly eligible for full employer contribution towards health insurance, can enroll within 30 days of hire. Can also enroll in Healthcare FSA and Dependent Day Care FSA.</li> <li>• Update Company Seniority Date</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>
<p><b>LTE (who is <u>not</u> enrolled in the WRS) to Permanent Classified, Unclassified, or Project</b></p>	<p><b>Job Data Updates</b> 2 HR Transactions</p> <ol style="list-style-type: none"> <li>1. Termination/End LTE Appointment</li> <li>2. Rehire/Original Appointment No WRS (or see <a href="#">Rehire</a> action reasons for applicable reason)</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Delete TER event from BAS Activity Table prior to 5pm of the date of termination entry. This will prevent the Termination event from possibly terminating benefits entered on the Hire event.</li> <li>• Update Elg Fld 1 with the applicable WRS category, update Elg Fld 2 with the applicable ICI category, remove any values that may be in Elg Fld 3</li> <li>• Rehire row should create a HIR event will open to the employee in eBenefits (eligible to enroll in all benefits).</li> <li>• Update Company Seniority Date and Benefits Service Date (to account for WRS begin date)</li> <li>• Review/update time reporter data and absence eligibility</li> </ul>
<p><b>LTE moves to another LTE position</b></p> <p><b>Note:</b> If there is a break of more than one pay period, the LTE appointment should be termed and rehired.</p>	<p><b>Job Data Updates</b> 1 HR Transaction</p> <ol style="list-style-type: none"> <li>1. Transfer/New LTE Appointment (see below for additional entry if employee becomes WRS eligible)</li> </ol> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• If not under the WRS, evaluate if WRS eligibility expectations relative to hours worked/duration have changed and the employee should go under the WRS. If newly eligible for WRS, after the first job entry, enter another effective sequenced row for the same date with the action reason of Data Change/Benefits Eligibility Config and update Elg Flds 1, 2 and 3. Update the Benefits Service Date to reflect the WRS begin date. Enter any benefits elections on the ELG event.</li> </ul>

**Remember, any movement between Empl Classes requires a Term and Rehire.**

Scenario	Transaction(s)
<p><b>LTE is hired into an additional LTE Appointment</b> (WITHIN the SAME agency)</p>	<p><b>Job Data Updates</b> Create a new employment instance (Hire) or use an eligible inactive employment instance (Rehire)</p> <p><b>HR, Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• If <b>not</b> under WRS, determine if 2<sup>nd</sup> LTE appointment makes the person eligible for WRS. If yes, on the new LTE job, update Elg Flds 1, 2 and 3 with the applicable values. On the original LTE appointment, add a job row effective the same date as the new LTE appointment with an action reason of Data Change/Benefits Eligibility Config and update Elg Flds 1, 2 and 3 with the same values entered on the new LTE appointment. <ul style="list-style-type: none"> <li>○ Update the benefits service date to the WRS begin date</li> <li>○ Finalize the HIR event that is created from the new job (employees should not use eBenefits to enroll in benefits in this situation)</li> <li>○ Collect paper applications from the employees and enter enrollments on the ELG event</li> </ul> </li> <li>• If under the WRS, <ul style="list-style-type: none"> <li>○ Finalize the HIR event that is created because it will open to the employee in eBenefits</li> <li>○ If the 2<sup>nd</sup> LTE appointment changes eligibility for the employer contribution towards health insurance. <ul style="list-style-type: none"> <li>▪ Enter <b>LTEFULLSGH</b> in Elg Fld 3 on the new appointment and add a job row effective the same date as the new LTE appointment with an action reason of Data Change/Benefits Eligibility Config and update Elg Fld 3 to <b>LTEFULLSGH</b> on the original LTE appointment.</li> <li>▪ The employee has 30 days to enroll in health insurance – enter on the ELG event.</li> </ul> </li> </ul> </li> </ul>
<p><b>LTE is hired into an additional LTE Appointment</b> (BETWEEN agencies)</p>	<p><b>Job Data Updates</b> Create a new employment instance (Hire) or use an existing eligible employment instance (Rehire) – see benefit record information below.</p> <p><b>HR, Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• WRS eligibility is determined by agency – look at expectations of LTE appointment at the agency only to determine if eligible for the WRS</li> <li>• If active at another agency, the new appointment should have a different benefit record than the job at the other agency. Reach out to the other agency to confirm the benefit record they are using and when creating the new LTE job, update the benefit record to one greater than the benefit record at the other agency (typically you will create benefit record 1). If using an existing employment instance, reach out to DPM Central Benefits to determine how the entry should be done.</li> </ul>

<b>Movement Between Companies</b>	<p><b>Job Data Updates</b></p> <ul style="list-style-type: none"> <li>• Sending organization – 1 HR Transaction <ul style="list-style-type: none"> <li>○ Termination/End Job Continue in Other Job (this creates a DTA event so benefits are not terminated)</li> </ul> </li> <li>• Receiving organization <ul style="list-style-type: none"> <li>○ Create a new employment instance (Hire/Hire from Affiliate) or use an existing eligible employment instance within your same company (Rehire/Rehire from Affiliate)</li> </ul> </li> </ul> <p><b>Payroll &amp; Benefits Considerations</b></p> <ul style="list-style-type: none"> <li>• Confirm that the benefits flag has been moved to the new employment instance – update as needed</li> <li>• A HIR event will be created by all benefits should flow into the event. Confirm the enrollments and finalize the HIR event. The employee should not make any benefit election on the HIR event in eBenefits.</li> </ul>
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**Reminders**

- 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 – new LTE appointment, transfer – new project appointment, or transfer – new unclassified 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 transacting on the record.

**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 5pm on the day that it is entered.
- Use rehire – rehire within 30 days action/action reason for employees who already have benefits, including WRS.
  - This reason will open HFA event to benefits administrator and carry through the employee’s current elections.
  - Using any other rehire action/action reason may result in benefits event opening to employee and the employee’s benefits terming if already enrolled.



## Personnel Transactions - Order of Operations

<p><b>Reclassification or Reallocation</b></p>	<ol style="list-style-type: none"> <li>1. Use position change request to change job code. <b>Wait for the position change request to process and create a job data row.</b></li> <li>2. <b>If the employee is regraded</b> with the reclass or reallocation, add a pay rate change/regrade job data row to update the comp rate.</li> <li>3. <b>If the FLSA status changes</b> with the reclass or reallocation, add a data change/absence eligibility change job data row to update the absence eligibility.</li> <li>4. <b>If the benefits eligibility changes</b> with the reclass or reallocation, add a data change/benefits eligibility change job data row to update the Elig Flds.</li> </ol>
<p><b>Transfer/Promotion/Demotion</b> Between Permanent/Classified Positions (Within Agency)</p>	<ol style="list-style-type: none"> <li>1. Add job data row for transfer/promotion/demotion/within agency updating position number, officer code, bargaining unit/labor agreement, tax location, and employee category.</li> <li>2. <b>If the employee is receiving a comp rate change</b> with the transaction, add a pay rate change/transfer/promotion/demotion row to update the comp rate.</li> <li>3. <b>If the FLSA status and/or absence eligibility changes</b> with the transaction, add a data change/absence eligibility change job data row to update the absence eligibility.</li> <li>4. <b>If the benefits eligibility changes</b> with the transaction, add a data change/benefits eligibility change job data row to update the Elig Flds.</li> </ol> <p><b>Note:</b> If you are using the Manage Hires function within TAM to process the transfer/promotion/demotion, you will not manually process the personnel transaction as instructed above. The Manage Hires function will add the personnel transaction to the employee's job data. <b>You do need to manually add the pay rate change, tax location change, absence eligibility change, and/or benefits eligibility change on Job Data.</b></p>
<p><b>Transfer/Promotion/Demotion</b> Between Permanent/Classified Positions (Between Agencies)</p>	<p><b>WAIT until the sending agency confirms that all time has been entered and approved.</b></p> <ol style="list-style-type: none"> <li>1. Use the job change request to "steal" the employee from the sending agency. (Only if NOT using the Manage Hires function in TAM)</li> <li>2. Add job data row for transfer/promotion/demotion/between agencies updating officer code, bargaining unit/labor agreement, tax location code, employee category, and pay group.</li> <li>3. <b>If the employee is receiving a comp rate change</b> with the transaction, add a pay rate change/transfer/promotion/demotion row to update the comp rate.</li> <li>4. <b>If the FLSA status changes</b> with the transaction, add a data change/absence eligibility change job data row to update the absence eligibility.</li> <li>5. <b>If the benefits eligibility changes</b> with the transaction, add a data change/benefits eligibility change job data row to update the Elig Flds.</li> </ol> <p><b>Note:</b> If you are using the Manage Hires function within TAM to process the transfer/promotion/demotion, you will not manually process the personnel transaction as instructed above. The Manage Hires function will add the personnel transaction to the employee's job data. <b>You do need to manually add the pay rate change, tax location change, absence eligibility change, and/or benefits eligibility change on Job Data.</b></p>

## Return From Leave - Order of Operations

<p>Employee Returns from and Unpaid LOA  <i>Adoption, Candidate for Partisan Office, Education, Exceptional Personal Reasons, FMLA, Maternity Leave, Medical, Military Service, Paternity Leave, Worker's Comp</i></p>	<p>1. Enter each intervening Pay Rate Change, sequencing each one in the order in which they would have happened, using the actual Pay Rate Change Action Reason, all effective on the Sunday of the beginning of the Pay Period in which the employee is RFL.                  2. Enter the RFL/RFL effective the day the employee is returning to work.</p> <p>EXAMPLES:</p> <p>Employee is on an Unpaid LOA/Military Service effective 11/20/2019 and is RFL effective 2/7/2020</p> <p>Intervening Pay Rate Changes effective the beginning of the pay period in which the employee is RFL                  2/2/2020, effective sequence 0 – Pay Rate Change/GWA – for the 1/5/20 GWA                  2/2/2020, effective sequence 1 – Pay Rate Change/Market – for a missed Market Adjustment (effective after the 1/5 GWA) while on LOA                  2/7/2020, effective sequence 0 – RFL/RFL</p>
<p>If the employee was on a Paid LOA and/or did not miss any intervening pay rate changes, you only need to process the RFL effective the day the employee returns to work.</p>	

## 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. Use position change request to update position to reflect the new classification, using the change 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. Process the personnel transaction on 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/absence eligibility job data row, if applicable
5. Add a data change/benefits eligibility configuration job data row, if applicable
6. Submit ticket for DPM to delete position change/classification row from incumbent's job data AND manually correct position entry date

This same order of transactions may be used in some other limited circumstances when an employee needs to be moved either within the same position or between positions. Always communicate with DPM Enterprise HRIS Operations when considering using this type of transaction combination.