HRMS Data Validation Guide

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WASHINGTON STATE

Office of Financial Management

State Human Resources & HRMS Data Stewards

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Purpose

The purpose of this document is to provide guidance and best practices on validating Human Resource Management System data to ensure complete, accurate, and consistent workforce data.

This guide is not exhaustive and will continue to be updated with additional content and recommendations.

Workforce Data

HRMS data is used in many ways and for many purposes. For example:

Agencies might use HRMS data to:

- Reduce risk and ensure compliance of policies, rules, and laws
- Ensure employees receive correct pay and benefits
- Help document the need for new strategies or programs
- Help make informed workforce planning decisions
- Evaluate and monitor program or strategy effectiveness

The Governor's Office or legislative staff might use HRMS data to:

- Help make informed decisions about the workforce
- Monitor progress towards a goal
- Evaluate program or policy effectiveness

State Human Resources might use HRMS data to:

- Make financial projections that inform collective bargaining and budget decisions
- Help inform enterprise policy and strategy decisions
- Evaluate and monitor program, policy, and strategy effectiveness
- Publish workforce data to the web
- Respond to records, data, and information requests from unions, the media, and private citizens

HRMS data is fed to multiple downstream systems, such as:

- Compensation Impact Model (CIM) for financial projections
- Accounting Financial Reporting System (AFRS) for payroll accounting details
- Washington Workforce Analytics (WWA) for enterprise reporting

- Health Care Authority for health benefits management
- Department of Retirement Systems for retirement benefits management
- Agency shadow systems

If HRMS data is not accurate then employees may not receive correct pay and benefits, agencies could receive penalties from audit findings, financial projections and budget allotments may be inaccurate, and legislative, policy, and strategy decisions may be made based on inaccurate workforce data analysis and conclusions.

Use

This guide will provide suggestions and recommendations for validating and cleaning your HRMS data.

The ultimate goal is to enter data into HRMS correctly the first time. However, there are many reasons why this does not always happen, for example, data entry mistakes, incomplete, untimely, or incorrect information, inconsistent processes, inadequate training, etc. This validation guide should supplement other data entry and internal control best practices, such as:

- ✓ Adhere to data standards, definitions, and processes
- ✓ Review all data entries (self, peer, lead/supervisor)
- ✓ Keep documentation and training materials up to date
- ✓ Educate processors on the importance of data accuracy
- ✓ Create a data quality culture across all levels of the organization

Validation Basics

To validate means to check the validity or accuracy of something. Here are some HRMS data validation tips:

- ✓ Look for missing data
- ✓ Compare data fields that should match
- ✓ Compare related data fields
- ✓ Check data fields against source documentation (such as appointment letters, employee completed forms, etc.)

- ✓ Check data fields against business rules (such as civil service rules, collective bargaining agreements, and agency policies)
- ✓ Use tools and technology to assist (such as vlookup formulas, pivot tables, advanced filtering, conditional formatting, etc. in Excel; or other data analysis tools)
- ✓ Develop processes to perform this work regularly and ongoing
- ✓ Create and save variants and/or ad hoc reports for repeated use
- ✓ Adjust processes and user education upon discovery of errors

When making corrections to coding errors, some data can be corrected in the current period. Work closely with your payroll office for retroactive corrections affecting employee pay, leave, or benefits. Some corrections may require additional action to rectify all affected data; again, work closely with your payroll office when making corrections.

Resources

There are many resources available to assist in validating and cleaning your HRMS data.

Resource	Description
Civil service rules	Provides civil service rules (Title 357 WAC) and supplemental information that applies to all non-represented employees and employers under the jurisdiction of Chapter 41.06 RCW except those positions or employees exempted under the provisions of Chapter 357-04 WAC.
Collective bargaining agreements	Provides contracts negotiated between the state and various unions and collective bargaining units.
Compensation and job classes	Provides information and tools related to the state's job classification and compensation structures.
HRMS data definitions	Provides resources to help HRMS end users code their data correctly, such as data definitions resource guide, coding reference guides, job aids, etc.
HRMS support hub	Provides centralized guidance and resource materials for HRMS users, such as user procedures, report procedures, helpful links, etc.

Payroll resources	Provides resources that help state agencies fulfill payroll accounting requirements in Chapter 25 of the SAAM, such as methods and procedures on cash recognition, deceased employees, mid period transfers, shared leave, garnishments, overpayments, etc.
State Administrative & Accounting Manual (SAAM)	Provides control and accountability over financial and administrative affairs of the state of Washington
Washington Workforce Analytics (WWA)	Provides information on using WWA, including basics, standard reports, and universe and data design documentation.

The Washington Workforce Analytics enterprise reporting solution has powerful ad hoc reporting capabilities that will make validating your HRMS data easier. Reporting in HRMS is more limited due to minimal ad hoc capabilities; however, there are a number of reports that can assist with your data validation.

This validation guide will list procedures, job aids, coding reference guides, and reports that may be helpful for each data category.

Affirmative Action & Demographic Data

Affirmative action and demographic data is collected and reported to help determine workforce representation, so that agencies and the enterprise can develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive.

In HRMS, most affirmative action and demographic related data is located on the Personal Data (0002) and Additional Personal Data (0077) infotypes. Some of this information can be updated by employees in MyPortal on the My Demographic Data tile.

Validations

- ✓ Are there any missing/blank fields?
- ✓ Does the data accurately reflect what the employee disclosed?
- ✓ For new hires, does the start date of the Additional Personal Data (0077) infotype record match the employee's hire date?
- ✓ Has the ethnic origin field been correctly determined based on the crosswalk? (When entered in MyPortal, the system will automatically populate the Ethnic Origin field based on the crosswalk and the employee's selections.)
- ✓ If the employee's ethnicity is set to Not Hispanic/Latino, is one or more race box selected?
- ✓ Do all veterans have the other protected veteran box checked?
- ✓ Do employees with military service have both their military status and veteran status fields completed? (An employee could be a veteran, military spouse, and current National Guard/reservist, so be sure to complete all appropriate fields as disclosed by the employee.)
- ✓ Do employees with military service also have the Military Service (0081) and Time Specification/Employ. Period (0552) infotypes completed?
- ✓ Do these infotype start and end dates accurately reflect the employee's prior and/or current military service?
- ✓ Have you re-surveyed your employees recently to ensure this data is up to date? Do you have a process in place for employees to notify you of changes, such as reminders to employees to update their information on the Demographic Data Tile in MyPortal?

Reports

- WWA Diversity Profile (HPA003)
- WWA Diversity New Hires (HPA004)
- WWA ad hoc queries
- HRMS Employee and Position Status Report (ZHR_RPTPA231)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)

Coding Resources

- HRMS Data Definitions Resource Guide
- Affirmative Action and Demographic Data Guide
- Personal Data, Military Service, and Additional Personal Data user procedures

Date Specifications

Dates on the Date Specifications (0041) infotype are used for various purposes, such as system calculations and processes, enterprise reporting, layoff lists, service awards, and other agency uses. It is important that these dates are accurate and up to date.

Validations

- ✓ Does the employee have all the Date Types necessary for system calculations and processes?
- ✓ Have applicable dates been updated or adjusted appropriately for scenarios such as:
  - Part-time employment?
  - Leave without pay?
  - Prior service?
  - Recent completions (PD, PDP, WMS Review, Prior PID, etc.)?
  - Current leave eligibility (Personal Holiday, Personal Leave Day, JEV)?
  - Military service (if your agency uses the Seniority w/ Military Date Type)?
  - Changes to anticipated end dates (if your agency uses the Anticipated End Date (42) Date Type for tracking time-limited appointments, such as non-perm, seasonal, or project appointments)?
- ✓ Are there obsolete Date Types (indicated by ZDNU prefix) on the employee's current record?
- ✓ Are there Date Types that are no longer applicable and can be removed from the employee's record?

Reports

- WWA ad hoc queries
- HRMS Date Specifications Report (ZHR_RPTPA765)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Actions Report (ZHR_RPTPA807)
- Wage Type Reporter (PC00_M99_CWTR)

Coding Resources

- HRMS Data Definitions Resource Guide
- Date Adjustments Guide
- Date Specifications user procedures

- Civil service rules
- Collective bargaining agreements

Employee Addresses

The employee's permanent residence, mailing, and out of state work location addresses are stored in the Addresses (0006) infotype and the employee's work email address is stored in the Communication (0105) infotype. Because employees can change some of their addresses in MyPortal on the My Addresses tile, some agencies have processes in place to monitor these changes.

Employees are required to have a permanent US residence address in HRMS in order to process payroll; mailing addresses are optional. Employees who are working outside of Washington should have an out of state work location address entered.

Employee work email address is needed for the "forgot password" and single sign on features for agencies that use MyPortal. It is also necessary for accurate routing of leave request/approval notifications from MyPortal.

For out-of-state employees, also see Out-of-State Employees section.

Validations

- ✓ Does the employee have a permanent residence address record within the US?
    - Is the correct two-digit county code assigned? (Note: if an out of state address is entered for the permanent residence address, then use the 40-Out of State county code)
- ✓ If the employee has a mailing address record, is it an address within the US?
    - Is the correct two-digit county code assigned? (Note: if an out of state address is entered for the mailing address, then use the 40-Out of State county code)
- ✓ For employees approved to work outside of Washington, do they have an active and accurate out of state work location address record?
    - Is the correct three-digit county code assigned?
- ✓ Did you use the USPS Address Lookup Tool to ensure the addresses were entered correctly?
- ✓ Do you have a process in place to update the employee's out of state work location address as the employee's work/telework location changes?
- ✓ Is the employee's email address their work email? (Note: It is highly recommended to use an employee's work email address, although there may be appropriate exceptions)

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)

Coding Resources

- HRMS Data Definitions Resource Guide
- Addresses user procedures
- Communication user procedures

Employees Paid According to their Job (includes Job to Person Relationships)

Employees should be paid based on the job they are performing and Basic Pay (0008) infotype should accurately reflect the employee's assigned job and corresponding pay. For most employees, their pay will align with both their assigned position and job. In situations where the employee is performing a job different than that assigned to their position (such as in-training or underfill appointments), the employee should have a direct job to person relationship created and their pay should reflect the planned compensation for the employee's job and not the position's job.

One appropriate exception to an employee's pay not reflecting their job's planned compensation is when the employee is authorized to be paid above the salary range or band maximum. The employee's pay scale group should reflect the job's planned compensation and their pay should be directly valued.

Validations

- ✓ Do the employee's Pay Scale Area and Group fields match the job's planned compensation?
- ✓ If the employee is on a standard, incremental salary schedule (Pay Scale), is their Indirect Valuation field set to "I" (Indirectly Valued)? (Note: this does not apply to employees who are paid above the maximum of their salary range)
- ✓ If the employee is authorized to be paid above the salary range or band maximum, is their Indirect Valuation field set to blank (directly valued), and their Pay Adjust Reason set to Y Rate (Non WMS Only) or W Rate (WMS Only)? (Note: or other applicable Pay Adjust Reason for WMS and EMS employees whose agency received approval from OFM to pay above the band)
- ✓ For employees with Assignment Pay or Premium Pay wage types on their Basic Pay (0008) infotype, is there authority to pay these amounts and are they relevant for the employee's current job and/or position?
    - For positions and employees eligible for various additional pay, has the appropriate wage type(s) been added to the employee's Basic Pay (0008) infotype?

    - For positions and employees no longer eligible for various additional pay, has the appropriate wage type(s) been removed from the employee's Basic Pay (0008) infotype?
- ✓ When an employee is performing a different job than that assigned to the position, has a job to person relationship been established?
    - Note: This is needed for underfills and in-training appointments until the employee reaches the goal classification.
    - As the employee progresses through an in-training plan, has the prior job to person relationship been ended? And has a new job to person relationship been created (if not yet at the goal class)?

Reports

- WWA ad hoc queries
- HRMS Job Class Planned Compensation Report (ZHR_RPTOMN05)
- HRMS Compare Actual Base Salary to Planned Compensation (S_AHR_61018798) (Note: this report only includes position planned compensation data. For employees with direct Job-to-person relationships, be sure to compare their salary with job planned compensation data instead.)
- HRMS Employee Basic Pay History Report (ZHR_RPTPAIT08)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS WMS and EMS Reports (ZHR_RPTPA802)

Coding Resources

- State Human Resources Compensation and job classes website
- HRMS Data Definitions Resource Guide
- In-Training Appointments Coding Reference Guide
- Job to Person Relationship – (Estab. In-training Plan) user procedure
- Job to Person Relationship – (In-training Plan Completed) user procedure
- Personnel Administration user procedures that assign an employee to a position, such as New Hire, Rehire, Appointment Change, and Concurrent Employment Actions
- Civil service rules
- Collective bargaining agreements

Home and Alternative Assignments

Per HR Directive 20-01 Home and alternative assignment approval & reporting requirements, home and alternative assignments need to be entered into HRMS for accurate monthly reporting. The data fields used are Action Type and Action Reason. Agencies are required to key the start and end date of home and alternative assignments using the designated codes below.

1. Action Type: Leave of Absence – Active (U8)
   (04) Home Assignment
   (42) Alternative Assignment
2. Return from Leave of Absence –Active (UA)*
   (17) Home Assignment
   (44) Alternative Assignment
   *Except in the event of a Separation action. A Return from Leave of Absence action is not necessary if an employee separates from state service prior to ending their alternative assignment; a Separation Action is sufficient.

Validations

- ✓ Did you enter a leave of absence action for each employee on home or alternative assignment?
- ✓ Did you enter a return from leave of absence action at the end of the home or alternative assignment? (except in the event of a separation)
- ✓ Were the Actions keyed by the fifth of the following month?

Reports

- WWA ad hoc queries
- HRMS Actions Report (ZHR_RPTPA807)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)

Coding Resources

- HRMS Data Definitions Resource Guide
- HR Directives - Home and alternative assignment approval & reporting requirements
- HR Directives - Procedure regarding home and alternative assignment reporting

Modern Work (Telework / Flex Work /Compressed Work Week

The Modern Work Environment promotes flexibility in how, when, and where work gets done. This data is used to improve strategies on Executive Order 16-07, “Building a Modern Work Environment”, as well as inform OFM Facilities on how often employees are teleworking (this is important data for long term facilities planning purposes). The OFM Statewide Space Use Policy directs agencies to maintain accurate telework data in HRMS.

There are several fields that exist in HRMS on both the position and employee. The Telework/Flex Work (POS) (9901) infotype tracks the position’s eligibility for telework, flextime, and compressed workweek schedules. The Telework/Flex Work (Employee) (9106) infotype tracks the employee’s participation in telework, flextime, and compressed workweek schedules. Employees are also able to update their telework, flextime, and compressed work week status in MyPortal on the My Modern Work Environment tile. The information entered by an employee in MyPortal will send a request for approval to their supervisor; HRMS will not be updated until the request has been approved. Updates to this information via MyPortal are only intended to update or correct coding in HRMS, it is not intended to replace any internal agency approval processes to participate in these modern work options.

Validations

- ✓ Is the position eligibility for telework, flex work, and compressed workweek accurate?
- ✓ Is the employee’s participation in telework, flex work, and compressed workweek accurate?
    - It is important that each employee have an active Telework/Flex Work record. If the employee is not participating, then indicate that using the selection options for not participating.
- ✓ Does the employee’s participation in telework/flex work align with the position’s eligibility?
    - Is the employee participating in telework, but the position’s telework eligibility is set to not eligible?
- ✓ Do you have a process in place to update the employee’s flextime and/or compressed workweek fields when the employee’s work schedule changes? Or do you have a process in place for the employee to make these changes in MyPortal once the schedule changes are approved?
- ✓ Do you have a process in place to update the employee’s telework field when the employee’s telework agreement or telework schedule changes? Or do you have a process in place for the employee to make these changes in MyPortal once the telework changes are approved?

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Employee Duty Station Reports (ZHR_RPTPA805)
- HRMS Position Duty Station Reports (ZHR_RPTOMN04)

Coding Resources

- HRMS Data Definitions Resource Guide
- Telework/Flex Work (Position) user procedures
- Telework/Flex Work (Employee) user procedures
- OFM Statewide Space Use Policy

Movement from Higher Education to General Government

Additional action is often needed in HRMS (compared to other new hire or rehire actions) when an employee moves, without a break in service, from higher education (or other state agency that does not use HRMS) into a general government agency that uses HRMS.

Validations

- ✓ Was the action reason set to Higher Ed to Gnl Gvt?
- ✓ If the employee gained permanent status with the higher education institution, do their contract type and work contract accurately reflect their status?
- ✓ Have the employee’s service dates been adjusted to account for prior state service?
- ✓ Have the employee’s leave balances been manually adjusted as needed?
- ✓ Does the employee have a Next Increase Date entered on their Basic Pay (0008) infotype? (Note: there may be appropriate exceptions)
- ✓ Was the employee put in the correct benefits plans?

Reports

- WWA ad hoc queries
- HRMS Actions Report (ZHR_RPTPA807)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Periodic Increment and Longevity Increase Projection Report (ZHR_RPTPA803)
- HRMS Attendance System Change Report (ZHR_RPTTM084)

Coding Resources

- HRMS Data Definitions Resource Guide
- Date Adjustments Guide
- Basic Pay – Add Next Increase Date user procedure
- Date Specifications user procedures
- Quotas Generate Accruals Manually user procedure
- Civil service rules
- Collective bargaining agreements

MyPortal Substitution Relationships (Planned/Unplanned)

Substitutes are MyPortal Leave or MWE approvers who are assigned by another supervisor to approve leave and MWE requests on their behalf while they are out of the office. All Leave and Modern Work Environment (MWE) Approvers in MyPortal should assign Substitute Approver(s) in the event they are unexpectedly out of the office. Substitutes are especially important to agencies using MyPortal leave, but are necessary for all agencies since the Modern Work Environment (MWE) change request workflow is configured for all agencies (for telework, flex work, and compressed workweek participation).

Substitute relationships do not end automatically when supervisors change positions, so it is important that substitute relationships are audited regularly to ensure they are still appropriate. Approvers should also be sure to take action on all approval requests and delimit or delete substitutions upon transferring or separating. However, knowing approvers won't always delimit or delete substitutions when needed, agencies are required to audit MyPortal Substitutes and end Substitute relationships when no longer needed. Typically, substitution relationships will need to be delimited or deleted when a MyPortal Leave/MWE Approver or a designated substitute separates or transfers.

Note: If the substitute relationship is not ended when the Leave/MWE Approver or substitute is separated, if/when they are rehired into the same or different agency, previously assigned substitute(s) will still be able to view and approve Leave/MWE requests on their behalf. Similarly, if a Leave/MWE Approver or substitute transfers to another agency the substitute will still be able to view/approve leave requests on behalf of the approver, which may no longer be appropriate.

Validations

- ✓ Have the original Leave/MWE Approver or substitute approver been withdrawn from state service? If yes, have the assigned planned or unplanned substitute relationships been delimited or deleted?
- ✓ Have the original Leave/MWE Approver or substitute approver transferred to another agency? If yes, have the assigned planned or unplanned substitute relationships been delimited or deleted?
- ✓ Have the original Leave/MWE Approver or substitute approver changed positions within the same agency? If yes, have the prior assigned planned or unplanned

substitute relationships been reviewed? If no longer appropriate, have the substitute relationships been delimited or deleted?

Note: When transferring within the same agency, depending on the move within the org structure, the substitute relationship(s) may still be appropriate or may need to be ended.

✓ Do all Leave/MWE Approvers have at least one unplanned substitute relationship assigned?

Reports

- HRMS MyPortal Substitution Report (ZHR_ESS_SUBSREPORT)

Coding Resources

- MyPortal Manage My Substitutes user procedures
- HRMS Substitute Admin Transaction user procedures
- MyPortal Substitute Relationship Coding Guide

Next Increase Date

Next Increase Date is an override to the automated periodic increment and longevity increase process, located on the Basic Pay (0008) infotype. There are many scenarios when a Next Increase Date override is needed. If a Next Increase Date is not entered when necessary, the employee may not receive their periodic increment or longevity increase on the correct date, resulting in an overpayment or underpayment.

Validations

- ✓ Ensure a Next Increase Date is entered on all applicable employees. Refer to the Coding Resources (below) for scenarios when a Next Increase Date is needed.

Reports

- WWA ad hoc queries
- HRMS Periodic Increment and Longevity Increase Projection Report (ZHR_RPTPA803)
- HRMS Employee Basic Pay History Report (ZHR_RPTPAIT08)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Actions Report (ZHR_RPTPA807)

Coding Resources

- HRMS Data Definitions Resource Guide
- Basic Pay – Add Next Increase Date user procedure
- Civil service rules
- Collective bargaining agreements

Non-Employees

Non-employees are individuals who receive payment via HRMS but are not typically considered state employees. There are many fields that require specific coding for non-employee positions and employees. Since non-employees are typically excluded from enterprise reporting, it is essential to code these fields correctly. Refer to the Non-Employee Coding Reference Guide for examples of non-employee groups.

Validations

- ✓ Are the position’s and employee’s Employee Group fields set appropriately?
- ✓ Are the position’s and employee’s Personnel Subarea fields set appropriately?
- ✓ Is the employee’s work contract set to Non Employee?
- ✓ Are the position’s and employee’s pay fields aligned and set appropriately?
- ✓ Is the employee’s Pay Adjust Reason set to Non Employee?

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Employee Duty Station Reports (ZHR_RPTPA805)
- HRMS Position Duty Station Reports (ZHR_RPTOMN04)
- HRMS IT1018 Position Cost Distribution (ZHR_RPTFI1018)

Coding Resources

- HRMS Data Definitions Resource Guide
- Non-Employee Coding Reference Guide

Out-of-State Payroll Taxes

In addition to Federal and Washington taxes, HRMS is configured for automated processing of Oregon and Idaho taxes. For employees who live and/or work in Oregon or Idaho, there are multiple infotypes that need to be maintained, and it is important they are all set up correctly to accurately pay employees and the applicable tax entities, and to assist agencies with required reporting.

Also see Employee Addresses, Modern Work, and Work County sections.

Validations

- ✓ Is the employee's residence tax area set appropriately based on where they live/reside on their Residence Tax Area (0207) infotype?
- ✓ Is the employee's work tax area(s) set appropriately based on where they are working on their Work Tax Area (0208) infotype?
- ✓ Is the employee's tax authority set appropriately based on where the employee's work is localized on their Unemployment State (0209) infotype?
- ✓ Is the employee's withholding information set appropriately based on the selections entered on the employee's Oregon or Idaho Form W-4, on their Withholding Info W4/W5 US (0210) infotype?
- ✓ If the employee should be exempted from any state taxes, have the appropriate exemption(s) been entered on Other Taxes US (0235)?
- ✓ Do you have a process in place to capture when/if changes are needed to the employee's payroll tax infotypes?
- ✓ When an employee is working out-of-state:
  - Does the employee have an active OOS Work Location Address record?
  - Is the UFI record (position and/or employee) set appropriately?

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- Preemptive Basic Data Check
- Out-of-State Tax Authority Locator Report (ZHR_TAXFINDER)
- Federal / State / Local Employer Identification Number Report (ZHR_RPTPY061)
- Oregon Filing Report (ZHR_RPTPYN37)
- Idaho Filing Report (ZHR_RPTPYN38)

Coding Resources

- HRMS Data Definitions Resource Guide
- Out-of-State Employee Coding Guide
- Additional Steps for Out-of-State Employees user procedures
- Payroll Out-of-State Employee Tax Resources

Part-time Employees

When an employee works part-time, many fields need to be coded appropriately for HRMS to calculate pay and benefits correctly. Most part-time related fields are located on the Planned Working Time (0007) and Basic Pay (0008) infotypes. These fields also impact calculated measures in enterprise reporting related to percent of position occupied.

Validations

- ✓ Is the employee's Part-time employee box checked? (Note: this box should be checked for all part-time employees)
- ✓ Does the employee's Wage Type on their Basic Pay (0008) infotype align with their Employee Subgroup?
- ✓ Does the employee's Time Management Status align with their Employee Subgroup?
- ✓ Does the employee's Working Hours per Payroll Period align with their Capacity Utilization Level?
- ✓ If the employee is hourly and has additional pay entered on their Basic Pay (0008) infotype, is their Capacity Utilization Level set to 100%?
- ✓ Do the employee's Employment Percent and Capacity Utilization Level fields match? (Note: there may be appropriate exceptions)
- ✓ Has the employee's seniority date been accurately adjusted for part-time work?

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Employee Basic Pay History Report (ZHR_RPTPAIT08)

Coding Resources

- HRMS Data Definitions Resource Guide
- Part-time Employees Coding Reference Guide
- Appointment Change Action (PA) – Change EE Subgroup or Adjustment of Hours user procedures
- Planned Working Time user procedures
- Basic Pay user procedures
- Civil service rules
- Collective bargaining agreements

Position and Employee Data

There are several fields that exist on both the position and employee. In many situations, the position and employee data should match.

Also see WMS Positions and Employees section.

Validations

- ✓ Compare the following employee and position fields to determine if they are set appropriately:
    - Personnel Area
    - Personnel Subarea (Note: there may be appropriate exceptions)
    - Employee Group
    - Employee Subgroup (Note: there may be appropriate exceptions)
    - Pay Scale/Grade Type, Area, Group (see Employees Paid According to their Jobs section)
- ✓ Does the employee's participation in telework/flexwork align with the position's eligibility? (see Modern Work section)

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Employee Duty Station Reports (ZHR_RPTPA805)
- HRMS Position Duty Station Reports (ZHR_RPTOMN04)
- HRMS IT1018 Position Cost Distribution (ZHR_RPTFI1018)

Coding Resources

- HRMS Data Definitions Resource Guide
- Non-Represented Management Coding Reference Guide
- Non-Employee Coding Reference Guide

Position Reporting Relationships

For agencies that use MyPortal for leave reporting, it is important that position reporting relationships are accurate so that leave requests are routed correctly. Each leave approver must have an active Manages (A 012) and Is line supervisor (B 002) relationships set up on their position, in addition to the applicable security role assigned.

Supervisor / Subordinate reporting relationships also feed to the Washington State Learning Center, so it is important to have accurate reporting relationships established for accurate supervisor designations for training notification and approval purposes.

Validations

- ✓ Do all filled positions identified as leave approvers have an active Manages (A 012) relationship?
- ✓ Do all filled positions identified as leave approvers have appropriate Is line supervisor (B 002) relationships?
- ✓ For positions that are multi-filled, is the correct incumbent being reported as the supervisor? (HRMS will only report one incumbent as the supervisor and defaults to the person with the lowest personnel number unless an override is entered.)

Reports

- WWA ad hoc queries
- HRMS Org Structure Maintenance Report (S_AHR_61016528)
- HRMS Organization and Staffing Display (PPOSE)

Coding Resources

- HRMS Data Definitions Resource Guide
- Create Position to Org Unit Manages (Chief) Relationships (ESS) user procedure
- Multi-Filled Supervisor/Leave Approver Position – Copy and Update Record

Redaction Indicator

The Redaction Indicator is used to indicate an agency should inquire further before releasing the employee's personally identifying information outside the agency. Refer to the Redaction Indicator data definition for the conditions under which it should be used. This field is located on the Personal Data (0002) infotype. The redaction indicator is a flag and will not automatically redact records.

The agency is responsible for determining the appropriateness of redacting the personally identifiable information (PII) data of employees that meet the criteria. The agency's Privacy Officer and/or Public Records Officer should be engaged in the decision making. In the case of public records requests or discovery requests, it is recommended that the agency consult with its assigned counsel in the Attorney General's Office prior to redacting or withholding records.

Validations

- ✓ Is the employee's Redaction Indicator field set appropriately?
- ✓ Do you have a process in place to update this field as the employee's circumstances change (i.e. as eligibility expires or changes)?

Reports

- WWA ad hoc queries (Note: redaction indicator is only available in the Employee Personal Info folder when using your WWA secure account)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)

Coding Resources

- HRMS Data Definitions Resource Guide
- Personal Data user procedures
- Applicable laws and rules on data privacy, PII, Public Records Act, etc.

Time Limited Appointments (Non-Perm, Project, Seasonal, etc.)

There are a few different types of time-limited appointments, such as non-perm limited, non-perm on-call, temporary, acting, project, and seasonal. There are a few different fields that identify or help track aspects of time-limited appointments.

Also see Date Specifications and Work Contract and Contract Type sections.

Validations

- ✓ Does the employee’s work contract accurately reflect the employee’s appointment status?
- ✓ If your agency uses the Anticipated End Date (42) date type, has it been set? If the appointment has been extended, has the date type been updated?
- ✓ If your agency uses Monitoring of Tasks to track scheduled end dates, has the appropriate task been created? If the appointment has been extended, has the task type been updated?
- ✓ If date adjustments are needed, have they been entered appropriately?
- ✓ When a seasonal employee returns after an off-season, has their pay been set correctly?

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Task Monitoring Report (S_PH0_48000450)
- HRMS Date Specifications Report (ZHR_RPTPA765)

Coding Resources

- HRMS Data Definitions Resource Guide
- Date Specifications user procedures
- Monitoring of Tasks user procedures
- Civil service rules
- Collective bargaining agreements

Union Representation

There are two primary fields that indicate a position's or employee's representation status: Personnel Subarea and Pay Scale Type. Representation status is used in system processes, calculations, and enterprise reporting; therefore it is important to have accurate data. Representation status may change with an appointment change or due to new or updated bargaining unit descriptions.

Validations

- ✓ Does the employee's Personnel Subarea match the position's? (Note: there may be appropriate exceptions)
- ✓ Does the employee's Pay Scale Type align with their Personnel Subarea?
- ✓ Does the employee have the appropriate union dues deduction entered, if appropriate?

Reports

- WWA ad hoc queries
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Employee and Position Status Report (ZHR_RPTPA231)
- HRMS Wage Type Report (ZHR_RPTPY004)
- Wage Type Reporter (PC00_M99_CWTR)

Coding Resources

- HRMS Data Definitions Resource Guide
- Recurring Payments/Deductions user procedures
- Collective bargaining agreements

Vacancy Indicator

Vacancy indicator identifies the availability of the position to be filled and is located on the position's Vacancy (1007) infotype. The vacancy indicator can be maintained directly by an organizational management processor through transaction code PO13, or by a personnel administration processor during certain PA40 actions. Personnel administration processors can use the Vacancy Indicator Coding Guide to help make correct selections during PA40 actions, but organizational management processors should routinely validate the vacancy indicator for accuracy.

For agencies with a lot of personnel actions, it can be challenging to accurately maintain the vacancy indicator as individuals move in and out of positions. In many cases, the vacancy indicator will align with the holder status. However, there are scenarios where there is not a holder (incumbent) in the position, but the position should be indicated as vacancy filled; or reversed, where there is a holder (incumbent) but the position should be indicated as open. For accurate vacancy data in HRMS, agencies may need to keep a list of positions where an employee has return rights or are expected to return to a specific position that is tracked outside of HRMS. Then review the HRMS vacancy indicator against this list and make corrections in HRMS as needed.

Validations

- ✓ Does the vacancy indicator accurately reflect the availability of the position?

Reports

- WWA ad hoc queries
- Organizational Management Transaction Report – Vacant Positions
- IT1018 Position Cost Distribution Report

Coding Resources

- HRMS Data Definitions Resource Guide
- Vacancy Indicator Coding Guide
- Appointment Change Action (PA) user procedures
- New Hire Action (PA) user procedures
- Rehire Action (PA) user procedures
- Separation Action (PA) user procedures

- Position Maintain Vacancy user procedure

WMS Positions and Employees

There are many fields that require specific or additional coding for Washington Management Service positions and employees. Correctly coding these fields is essential for accurate enterprise reporting. The position and/or employee is considered WMS if they are assigned a WMS job. However, the two WMS reports in HRMS were built to return positions and/or employees if the Personnel Subarea field is set to WMS.

When you reallocate a position into or out of WMS, or re-band a WMS position, it is especially important to ensure you have reviewed and updated all necessary fields.

Validations

- ✓ Does the position have a current working title?
- ✓ Does the position have a single active Management Type relationship?
- ✓ Does the position have a single active Market Segment relationship?
- ✓ Does the position have a single active JVAC relationship?
- ✓ Have all old JVAC Points on the position's Description (1002) infotype been delimited?
- ✓ Does the position have active Primary Inclusion and Secondary Inclusion (if applicable) relationships?
- ✓ Is the position's Personnel Subarea field set to WMS?
- ✓ Does the position's planned compensation align with the assigned WMS job (Pay Grade Type = Non-Represented, Pay Grade Area = WMS, Pay Grade = appropriate band)?
- ✓ Are the position and employee pay fields aligned and set appropriately? (see Employees Paid According to their Jobs)
- ✓ Is the employee's Personnel Subarea field set to WMS?
- ✓ Is the employee's work contract set appropriately?
    - Was the employee's status updated after completing their WMS review period?
- ✓ Do the employee's pay fields match the WMS job assigned (Pay Grade Type = Non-Represented, Pay Grade Area = WMS, Pay Grade and Pay Grade Level = appropriate band)?

Reports

- WWA ad hoc queries
- HRMS WMS/EMS Reports (ZHR_RPTPA802)
- HRMS WMS Activity Reports (ZHR_RPTOMN03)

- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)

Coding Resources

- HRMS Data Definitions Resource Guide
- Non-Represented Management Coding Reference Guide
- Washington Management Service website
- Civil service rules
- Collective bargaining agreements

Work Contract and Contract Type

It is important that the employee's Work Contract and Contract Type accurately reflect the employee's status. Be sure to update these fields appropriately once an employee has completed a review period. You can easily track when a review period is ending by using the Monitoring of Tasks (0049) infotype and Task Monitoring Report (S_PH0_48000450). Or, you can manually calculate when the review period ends based on the employee's Appointment Date or Action Effective Date; be sure to consider any review period extensions, prior time that counts, or adjustments due to leave without pay.

Refer to civil service rules or collective bargaining agreements for when a review period is required, and which type of review period and length.

Validations

- ✓ For employees who have completed a probationary period, is their Contract Type set to Permanent?
- ✓ Are there any employees whose work contract still shows a review period even though they have successfully completed it?
  - Review period work contracts = Apprntc/Prob (07), Apprntc/Trl Srv (08), Apprntc/Trnstnl (13), InTrng/Prob (04), InTrng/Trl Srv (05), Probationary (02), Project – Prob (22), Project TrSvc (21), Seasonal – Prob (19), Review Period (26), Seasonal TrSvc (18), Trial Service (03), Transitional (10), and WMS Review (23).
- ✓ Do all non-employees have their work contract set to non-employee? (see Non-Employees section)
- ✓ Does the employee's work contract accurately reflect their current appointment status?
- ✓ Does the employee's contract type accurately reflect their state status?

Reports

- WWA ad hoc queries
- HRMS Task Monitoring Report (S_PH0_48000450)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)
- HRMS Actions Report (ZHR_RPTPA807)

Coding Resources

- HRMS Data Definitions Resource Guide
- Change of Status Action user procedure

- Monitoring of Tasks user procedures
- Civil service rules
- Collective bargaining agreements

Work County

There are multiple work county data fields in HRMS: Duty Station County, UFI County, Worksite, and Out of State Work Location. These fields are used in many ways for multiple purposes, so it is important that all fields are current and accurate. Because work county data lives on several infotypes in HRMS and is entered by multiple roles, it easily becomes out of sync. UFI address information is entered on the position's Address (1028) infotype, and an override can be entered on the employee's Duty Station Address (9105) infotype. Duty station county is entered on the position's Job Attributes (1660) infotype, but is only needed if a UFI address does not exist on the position. Worksite county is entered on the employee's Unemployment State (0209) infotype (except for employees whose work is localized to Oregon or Idaho). Out of State Work Location is entered on the Addresses (0006) infotype and should reflect the work location of any employee who works outside Washington.

Refer to the data definitions resource guide for each of the work county field definitions. The data definitions also include information about the various uses of each county field.

Validations

- ✓ Are there any missing/blank county fields?
  - If the position's UFI address is blank, is the Duty Station County field populated correctly?
- ✓ Does the employee's Worksite county match the position's (or employee's override) UFI county? (For employees whose work is localized to Washington.)
- ✓ For appointment changes where the employee changed duty stations or primary work locations, were all necessary county/address fields updated?
- ✓ For employees approved to receive location-based additional pay, such as Group C Assignment Pay or King County Premium Pay, do they have the correct wage type(s) added to their Basic Pay (0008) infotype?
- ✓ For employees who received location-based additional pay but then moved to a position/county no longer eligible (or otherwise became no longer eligible), was the additional pay wage type(s) removed from their Basic Pay (0008) infotype?
- ✓ Do you have a process in place to update the employee's UFI and Worksite counties when the employee's telework location changes?
- ✓ For employees approved to work outside of Washington, do they have an accurate Out of State Work Location address?
- ✓ Do you have a process in place to update the employee's Out of State Work Location address as the employee's work/telework location changes?

Reports

- WWA ad hoc queries
- HRMS Employee Duty Station Reports (ZHR_RPTPA805)
- HRMS Position Duty Station Reports (ZHR_RPTOMN04)
- HRMS Employee Basic Pay History Report (ZHR_RPTPAIT08)
- HRMS Flexible Employee Data Report (ZHR_RPTPAN02)

Coding Resources

- HRMS Data Definitions Resource Guide
- Position – Maintain Address user procedure
- Duty Station Address user procedures
- Addresses user procedures
- Unemployment State user procedures
- Civil service rules
- Collective bargaining agreements