

# HRMS Project Coding Guide

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WASHINGTON STATE  
**Office of Financial Management**  
State Human Resources & HRMS Data Stewards



# Purpose

There are multiple fields in HRMS that contain information related to project appointments. Use this guide to assist when entering project related actions.

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### Additional Resources:

- [HRMS Data Definitions](#)
- [HRMS F1 Help](#)
- [HRMS Support Hub](#)
- [Title 357 WAC](#)
- [Collective Bargaining Agreements](#)

# Action Type / Action Reason

When hiring or appointing an employee into a project position, there are several different action types and action reasons that can be used. Make the selection that best describes the employee's appointment.

**Notes:** *Not all possible action reasons are listed. See [HRMS Data Definitions](#) for complete list.*

*The Project action reason can be used for any project appointment, but if a more specific reason applies, consider using that instead.*

Personnel Action (PA40)	
Action Type	Action Reason
New Hire (U0)	Probationary WMS Review Appt
Rehire (U6)	Probationary Layoff List WMS Review Appt
Appointment Change (U3)	Promotion Transfer Demotion – Voluntary Probationary Project WMS Review Appt
Change of Status (UJ)	Review Period Complete Project – Extend Probationary Period – Extend Transitional Rev Per – Extend Trial Service Period – Extend WMS Review Period – Extend
Concurrent Employment (UM)	Project

# Employee Group

The Employee Group field is the primary way to identify project positions and employees. Any position that is intended to be filled by an employee to work on a project that is contingent on funding and of a time-limited nature with an expected end date, should have the Employee Group field set to Project (C). The Employee Group coding carries over to the employee.

Personnel structure					
EE group	C	Project	Payr.area	11	Semi-monthly
EE subgroup	01	Monthly(M) OT Exempt	Contract	Project	

Personnel structure					
EE group	C	Project	Payr.area	11	Semi-monthly
EE subgroup	01	Monthly(M) OT Exempt	Contract	WMS Review	

**Note:** Consider including the Employee Group field in workforce reporting when needing to distinguish project employees. While the Contract field includes some project appointment statuses, there could be other selections used for project appointments (i.e. In-training, Review Period, WMS Review, etc.) that don't include "project" in the name. See page 5 for more information on the Contract field.

# Contract

The Contract field should reflect the employee's appointment status. There are only three project related Contracts, however, there are additional selections that may apply to an employee in a project position. Select the Contract that best describes the employee's appointment status.

Personnel structure

EE group	C	Project	Payr.area	11	Semi-monthly
EE subgroup	01	Monthly(M) OT Exempt	Contract	Project - Prob	▼

Personnel structure

EE group	C	Project	Payr.area	11	Semi-monthly
EE subgroup	06	M-OT Elig>40hrs/wk	Contract	InTrng/Prob	▼

**Note:** Consider including the Employee Group field in workforce reporting when needing to distinguish project employees. While the Contract field includes some project appointment statuses, there could be other selections used for project appointments (i.e. In-training, Review Period, Transitional, WMS Review, etc.) that don't include "project" in the name.

# Contract Type

The Contract Type field should reflect the employee's status as either non-permanent, permanent, or permanent project status.

Contractual regulations

Contract Type Non-Permanent ▼

Contractual regulations

Contract Type Permanent ▼

Contractual regulations

Contract Type Permanent - Project ▼

**Note:** Represented employees who attain permanent project status gain certain rights provided in their collective bargaining agreement. These rights might be less than those gained upon attaining full permanent status. Refer to the applicable collective bargaining agreement to determine the correct selection and for more information on rights and status. Permanent – Project does not apply to non-represented employees.

# Monitoring of Tasks

The Monitoring of Tasks infotype can be used to help track upcoming events or tasks such as end dates. For project appointments, consider using the Project End Date task to track the end date of an employee's project appointment; and use other tasks to track review period and/or in-training completion dates as needed.

*Notes: Not all task types are listed. See [HRMS Data Definitions](#) for complete list.*

## Monitoring of Tasks

### Task Type

Project End Date (11)

Prob Period End Date (01)

Review Per End Date (44)

Trans Review End (12)

Trial Service End (02)

WMS Review Period (10)

In-Training Step Com (15)

In-Training Complete (03)

# Project Action Examples

The following pages provide multiple examples of actions that may occur with project appointments.

## Considerations:

- There is not an example for every possible scenario.
- The coding used in each example is simply an example. Refer to Title 357 WAC and/or collective bargaining agreements for details on the type of appointment, the employee's status, and whether a review period is required. One slight change to the scenario could affect the coding that should be used.
- Not all possible field selections are listed within the examples. See [HRMS Data Definitions](#) for complete list.

## Example Scenarios:

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# Example: New Hire into Project Position

An employee with no prior state service has been hired into a project position and will serve a probationary period:

Personnel Action (PA40)	
Action Type:	<a href="#">New Hire (U0)</a>
Reason for Action:	<a href="#">Probationary (02)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Project - Prob (22)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Non-Permanent (01)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Use the Project End Date (11) and Prob Period End Date (01) task types to track scheduled completion dates. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Rehire into Project Position

An employee is being hired off the agency's internal layoff list into a project position and will serve a transitional review period:

Personnel Action (PA40)	
Action Type:	<a href="#">Rehire (U6)</a>
Reason for Action:	<a href="#">Layoff List (18)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Transitional (10)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Non-Permanent (01)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Use the Project End Date (11) and Trans Review End (12) task types to track scheduled completion dates. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Appointment into Project Position

An employee with permanent status has been hired from another agency into a project position as a transfer and will serve a Review Period:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">Transfer (58)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Review Period (26)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Permanent</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Use the Project End Date (11) and Review Per End Date (44) task types to track scheduled completion dates. Review active tasks and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Activity within a Project

A permanent, non-represented employee's project position is being reallocated to a higher job classification within the same project; the employee has performed the higher-level duties for more than six months and is appointed with permanent status:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">Reallocation - Upward (72)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Project - Perm (20)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Permanent (00)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Review active tasks and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Movement to a different Project

A represented employee with permanent project status in a project appointment is promoting to a position in a different project and will serve a trial service period:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">Promotion (01)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Project TrSvc (21)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Permanent – Project (02)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Use the Project End Date (11) and Trial Service End (02) task types to track new scheduled completion dates. Review active tasks and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: In-Training in a Project Position

An employee with no prior state service is hired into an in-training appointment in a project position and will serve a probationary review period:

Personnel Action (PA40)	
Action Type:	<a href="#">New Hire (U0)</a>
Reason for Action:	<a href="#">In-Training (11)</a>
Employee Group:	<a href="#">Project (C)</a>
Organizational Assignment (0001)	
Contract (Appt Status):	<a href="#">InTrng/Prob (04)</a>
Contract Elements (0016)	
Contract Type:	<a href="#">Non-Permanent (01)</a>
Monitoring of Tasks (0016) - <i>Optional</i>	
Use the Project End Date (11), Prob Period End Date (01), and In-Training Step Com (15) task types to track scheduled completion dates. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

For any in-training appointments, be sure to maintain the Job to Person relationship. In this example, since the employee is hired into a new in-training appointment, the Job to Person relationship will need to be created on the first level job class. See [In-Training Appointments Coding Guide](#) for more information.

# Example: Completion of Probationary Period

A represented employee in a project position has completed their probationary period; their collective bargaining agreement states they attain permanent project status upon completion of the probationary period:

Personnel Action (PA40)	
Action Type:	<a href="#">Change of Status (UJ)</a>
Reason for Action:	<a href="#">Review Period Complete (22)</a>
Employee Group:	<a href="#">Project (C)</a>
Organizational Assignment (0001)	
Contract (Appt Status):	<a href="#">Project - Perm (20)</a>
Contract Elements (0016)	
Contract Type:	<a href="#">Permanent - Project (02)</a>
Monitoring of Tasks (0016) - Optional	
Update the Prob Period End Date (01) task and mark complete. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Extension of Review Period

An employee in a project position is having their probationary period extended:

Personnel Action (PA40)	
Action Type:	<a href="#">Change of Status (UJ)</a>
Reason for Action:	<a href="#">Probationary Period – Extend (12)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Project - Prob (22)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Non-Permanent (01)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Don't create a new task during the action. Instead, update the existing Prob Period End Date (01) task with the new scheduled completion date. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Completion of In-Training

A represented employee with permanent project status has successfully completed all steps of their in-training appointment in a project position, and will serve a trial service period in the goal class:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">In-Training Series – Complete (12)</a>
Employee Group:	<a href="#">Project (C)</a>
Organizational Assignment (0001)	
Contract (Appt Status):	<a href="#">Project TrSvc (21)</a>
Contract Elements (0016)	
Contract Type:	<a href="#">Permanent – Project (02)</a>
Monitoring of Tasks (0016) - Optional	
Use the Trial Service End (02) task type to track new scheduled completion dates. Review active tasks, such as In-Training Complete (03) and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

For any in-training appointments, be sure to maintain the Job to Person relationship. In this example, since the employee has reached the goal class, the Job to Person relationship on the prior job will need to be delimited. See [In-Training Appointments Coding Guide](#) for more information.

# Example: Convert to Non-Project

A represented employee's project appointment is being converted into a permanent appointment and will serve a trial service period:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">Convert to Perm Appointment (84)</a>
Employee Group:	<a href="#">Permanent (0)</a>
Organizational Assignment (0001)	
Contract (Appt Status):	<a href="#">Trial Service (03)</a>
Contract Elements (0016)	
Contract Type:	<a href="#">Permanent - Project (02)*</a>
Monitoring of Tasks (0016) - Optional	
Use the Trial Service End (02) task type to track new scheduled completion dates. Review active tasks, such as the Project End Date (11) task, and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

\*For this example, the employee has previously attained permanent project status. After the employee completes the trial service period in the permanent appointment, the employee's Contract Type should be changed to Permanent.

# Example: Movement out of a Project

A non-represented employee with permanent status in a project appointment is promoting to a non-project position and will serve a WMS review period:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">Promotion (01)</a>
Employee Group:	<a href="#">Permanent (0)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">WMS Review (23)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Permanent (00)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Use the WMS Review Period (10) task type to track new scheduled completion dates. Review active tasks, such as the Project End Date (11) task, and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

# Example: Movement out of a Project

A represented employee with permanent project status is promoting to a non-project position and will serve a trial service period:

Personnel Action (PA40)	
Action Type:	<a href="#">Appointment Change (U3)</a>
Reason for Action:	<a href="#">Promotion (01)</a>
Employee Group:	<a href="#">Permanent (0)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Trial Service (03)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Permanent – Project (02)*</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
Use the Trial Service End (02) task type to track new scheduled completion dates. Review active tasks, such as the Project End Date (11) task, and update, mark complete, or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	

\*For this example, the employee has previously attained permanent project status. After the employee completes the trial service period in the permanent appointment, the employee's Contract Type should be changed to Permanent.

# Example: Separation from a Project

A represented employee with permanent project status in a project appointment is laid off at the end of the project:

Personnel Action (PA40)	
Action Type:	<a href="#">Separation (U5)</a>
Reason for Action:	<a href="#">Layoff (55)</a>
Employee Group:	<a href="#">Project (C)</a>
<b>Organizational Assignment (0001)</b>	
Contract (Appt Status):	<a href="#">Project - Perm (20)</a>
<b>Contract Elements (0016)</b>	
Contract Type:	<a href="#">Permanent – Project (02)</a>
<b>Monitoring of Tasks (0016) - Optional</b>	
No new tasks are needed during a separation action. Review active tasks and mark complete or delete as needed. View tasks using the Monitoring of Tasks report (S_PH0_48000450).	