



Effective Dating in HRMS

PPA Meeting – March 26, 2008

Personnel and Payroll Association



Transaction Codes

- n PA 20 – Display HR Master Data
 - View infotypes one at a time; display only

- n PA 30 – Maintain HR Master Data
 - Update specific infotypes one at a time

- n PA 40 – Personnel Actions
 - Prompts the completion of all required infotypes; entries flow from one infotype to another

Color Codes for Effective-Dating Tables

Pink	Do not end date
Yellow	PA40 Action will bring up Infotype, but can be skipped if it is not to change; leave date end date as 12/31/9999
Blue	PA40 Action will bring up Infotype to be delimited (last day plus one) / end dated
Light Green	Not a part of PA40 but might require delimiting (last day plus one)/end dating if applicable
Purple	Infotype (rows)

Effective-Dating for Separations

Date of transaction

INFOTYPE										
Action	IT0001	IT0007	IT0008	IT0009	IT0027	IT0014	IT0015	IT0041		
	Org. Assn	Work Schedule	Basic Pay	Bank Details	Cost Dist.	Rec. Pymnts/Ded	Add. Pymnts	Date Specifications		
Separation (use to properly end date Infotypes)	PA40 action end dates current IT; creates new record in default 99999999 position to 12/31/9999	Do not end date	Do not end date	Do not end date	Last Day of Pay Period (15th or last day of month)	Last Day of Pay Period (15th or last day of month)	Last Day of Pay Period (15th or last day of month)	Do not end date		
	IT2006	IT0194	IT0195	IT0167	IT0169	IT0377	IT0171	IT0416	IT0103	IT0104
	Absence Quotas	Garnishment Doc	Garnishment Order	Health Plans	Savings Plans	Misc. Plans	Gen. Benefit Info	Time Quota Comp.	Bond Purchases	Bond Denominations
	Do not end date	Check Date (10th) Note: end date Order before Document	Check Date (10th) Note: end date Order before Document	Last Day of Employed Month	Last Day of Pay Period (15th or last day of month)	Last Day of Pay Period (15th or last day of month)	Do not end date	Last Day of Employed Month	Last Day of Pay Period (usually 30th)	Last Day of Pay Period (usually 30th)

Effective-Dating for Appointment Change

Date of transaction

INFOTYPE										
Action	IT0001	IT0007	IT0008	IT0009	IT0027	IT0014	IT0015	IT0041		
	Org. Assn	Work Schedule	Basic Pay	Bank Details	Cost Dist.	Rec. Pymnts/Ded	Add. Pymnts	Date Specifications		
Appointment Change (use to properly end date Infotypes)	PA40 transfer action end dates current IT; creates new record that will be populated by HR in new position with end date to 12/31/9999	PA40 transfer action will end date current IT and create new record populated by HR with new work schedule and end date to 12/31/9999 UNLESS no change is needed then Infotype can be paged through (skipped).	PA40 transfer action will end date current IT and create new record that will be populated by HR in new basic pay with end date to 12/31/9999 UNLESS no change is needed then Infotype can be paged through (skipped).	do not end date	Last Day of Employment	Day of Transfer*	Day of Transfer*	PA40 transfer action will end date current IT and creates new record that will be populated by HR with new dates and end date to 12/31/9999 UNLESS no change is needed then Infotype can be paged through (skipped).		
	IT2006	IT0194	IT0195	IT0167	IT0169	IT0377	IT0171	IT0416	IT0103	IT0104
	Absence Quotas	Garnishment Doc	Garnishment Order	Health Plans	Savings Plans	Misc. Plans	Gen. Benefit Info	Time Qkota Comp.	Bond Purchases	Bond Denominations
Do not end date	Agency Specific Garnishment **/ SOW Garnishment *** Note: action should happen on Order before Document	Agency Specific Garnishment**/ SOW Garnishment**** Note: action should happen on Order before Document	Last day employee is paid by losing agency	Do not end date	Do not end date	Do not end date	Not applicable	Do not end date	Do not end date	

Effective Dating Helps



Help Hint for Check Date: Most frequently the actual check dates (pay dates) are the 10th and 25th of the month. If the actual check date (pay date) falls on another date, you will need to use that date.

Example: In November, because of the Thanksgiving Holiday, the actual check date (pay date) frequently falls on the 23rd of the month. The to date in this example would be 11/23 because this is the actual check date for the pay period; you would not use 11/25.

Questions About Effective Dating?

About PPA – Executive Committee

PPA Executive Committee:

- n Comprised of representatives from agency HR and payroll staff and Central Support Agencies (DOP, OFM, DRS, HCA, OST).
- n Meets monthly to:
 - Determine issues and concerns of agency HR and Payroll staff and establish PPA Meeting agendas.
 - Coordinate Work Groups to build and present topics of interest.
 - Keep agency HR and Payroll staff informed!

Why are Monthly PPA Meetings Important?

- n Communication and standards for Washington State
- n Ongoing resource for the most current information
- n Training
- n Problem Solving – agencies helping agencies
- n Networking with other agencies
- n Encourages use of the tools available (HRMS)

Where We Are Heading

- n Proactive planning for relevant, engaging PPA Meetings on a regular schedule
- n Training, including “topic-building” - basics → advanced
- n Increased agency HR and payroll involvement in PPA
- n Increased CSA involvement and communication
- n Listening to your needs!

How YOU Can Become a Part of the PPA Future!

- n Tell us your agency issues, concerns, and training needs
- n Share solutions - how does your agency do “X”?
- n Volunteer for a PPA Work Group
- n Attend PPA Meetings and encourage others to attend – learn and build confidence!

Resources

- n PPA - <http://www.dop.wa.gov/HRMS/PPA/>
 - Wendy Harris, Chair (DOC) 360-725-8350
- n OFM - <http://www.ofm.wa.gov/resources/payroll.asp>
 - Steve Nielson 360-664-7681 or Steve Ketelsen 360-664-7777
- n DRS - <http://drs.wa.gov/default.htm>
 - Brian Berghoff 360-664-7165
- n HCA - <http://www.perspay.hca.wa.gov/>
 - Steve Norsen 360-412-4201
- n OST - <http://tre.wa.gov/>
 - Connie Scheller 360-902-8906

Resources - DOP

HRMS Customer Support Web Site

<http://www.dop.wa.gov/HRMS/Customersupport>

- § **Messages** – *Messages for end users*
- § **Resources** – *Reports, Absence/Wage Types, OLQR*
- § **Schedules** – *HRMS Payroll Calendar*
- § **PPA** – *Handouts and minutes from monthly meetings*

Contacts

Carol Wyckoff 360-664-6336

Nadine Cummings 360-664-6449

DOP Help Desk – 360-664-6400

Training – OEDS

<http://www.dop.wa.gov/Employees/TrainingAndDevelopment/default.htm>

PPA – We Can Put It All Together!

