

<b>Type: System Enhancements</b>	<b>ID Number: SE 122</b>
<b>Date: Feb. 10, 2015 (Updated)</b>	<b>Subject: Personnel Action Request (PAR) Process Enhancements</b>

**Suggested Audience:**  
Human resource offices

**Details:**  
Enhancements are being made to the Personnel Action Request (PAR) process in People First to improve the user experience and make the process more intuitive. **The system enhancements will be implemented on Dec. 13, 2014**, and include:

**PAR Form Updates**

- When creating the PAR form, the effective date for the action will no longer default to the current date, requiring the PAR creator to input the correct effective date.
  - This enhancement will prevent errors from occurring when the PAR creator does not update the effective date.
- New edits will prevent a PAR appointment action from being created for an employee that was separated with a reason of Death of the Employee or Death of Employee Line of Duty.
  - If a mistake was made and the wrong separation PAR was completed for an employee, the human resource office will need to work with the People First Service Center to correct the separation reason.
- The current field titled Position FTE will be retitled to Employee FTE and a new field titled Position FTE will be added. The Position FTE field will be view only and will populate from the position.
  - This enhancement will allow the employee FTE information and position FTE information to be accurately reflected on the PAR.
- The section on the PAR form related to an appointment (i.e., minimum of class; percent above minimum of class) and prerequisites will be removed.
  - The information is rarely used and was recommended for removal by the PAR Agency Focus Group.
- The text None Given will no longer automatically populate in the Justification/Special Requests section if the PAR creator does not add information when creating the PAR form.
- Improved search features when assigning approvers to PAR form. PAR liaison will search by employee name (i.e., search by first and last name) instead of by position number when assigning approvers.
- Human resource users (assigned security role code A, H, U, X or Y) will have the ability to update the PAR liaison directly on the PAR form, for PARs within their security authorization. Once the PAR liaison is updated, the PAR form will be removed from the assigned liaison's PAR menu and will be added to PAR menu for the new liaison that was assigned by the human resource user.
  - Currently, if a PAR is created and a PAR liaison is not available, the agency has to wait until the liaison is available to route the PAR or update the PAR Liaison Maintenance screen and recreate the PAR.

- Human resource users (assigned security role code A, H, U, X or Y) will have the ability to add or update approvers and assign or update an interceptor on behalf of the PAR liaison directly on the PAR form, for PARs within their security authorization. The human resource user can make updates during the submitted, partially approved and approved stages of the PAR process (only the interceptor can be updated at the approved stage). The access for a PAR liaison to add/update approvers is not changing. The PAR liaison will also have access to assign/update an interceptor.
  - Currently, only the PAR liaison has access to make changes to approvers during the submitted and partially approved stages of the PAR process.
- When maintaining PAR liaisons on the PAR Liaison Maintenance screen, line numbers will be added in order to improve the process of updating the assigned liaisons. When an error message is presented, the message text will include the line number where the error exists.
  - Currently, users cannot easily identify where an error exists when a message is presented.
- When acting upon a separation PAR, the DROP/Retirement screen will no longer be presented in order to prevent retirement code records from being extended beyond the employee's last day employed.
  - Currently, some agencies are saving on the DROP/Retirement record creating an infinity (12/31/9999) end date for the retirement code record for the employee, which is resulting in a termination date not being sent on the OPS FICA Alternative Plan file.
- When pay change PARs are created, new edits will force the salary to be increased or decreased, depending on the pay change type being created. For example, if a SMS/SES Discretionary Increase pay change PAR is being created, the new base salary must be higher than current base salary.
- When printing the PAR form, the form will be presented in a printer friendly PDF format that includes displaying the PAR form on one page. To print in the PDF format, the user must select the View PDF button. When selected, the PAR form will open in a separate window in PDF format. The form can then be printed or saved.
  - The Print button (located in the header within the People First system) will continue to work as it does today, however; to print in the new format, users must select the View PDF button.

### New PAR Appointment Type and Separation Reason

- A new appointment type and involuntary separation reason of Legislative Directed Transfer will be available when appointing or separating an active employee. The appointment type and separation reason **should only be used** when employee movements are directed by legislation. The Legislative Directed Transfer reason can be used for salaried employees only (cannot be used for OPS). The appointment type will be available for both employee movements within an agency and between agencies, but must be completed with no break in service (i.e., the appointment date must be the day after the last day employed). When using the Legislative Directed Transfer appointment type, the employee's current appointment status will not be affected (i.e., it will be copied and maintained).
- A new involuntary separation reason of Dismissal – Emp Also Retires will be added. This separation reason allows the agency to dismiss an employee, but also allows the retirement process to begin for eligible employees without having to take additional steps

with the People First Service Center. Once the separation action is processed, the Dismissal – Emp Also Retires reason will trigger the mailing of the retirement and COBRA packages.

### **PAR Interceptor Updates**

- In addition to human resource users (assigned security role code A, H, U, X or Y) being able to intercept and act upon a PAR, users with the proper security authorization to the employee/position can be assigned as an interceptor during the submitted, partially approved and approved stages of the PAR process. Assignment of the PAR interceptor can be made by the assigned PAR liaison or by a human resource user who has access to the PAR based on his/her security role code allowance. Once assigned as an interceptor, all associated tasks on the PAR creator's People First home page and PAR menu will be reassigned to the assigned interceptor. When an employee is assigned as the interceptor and is also assigned as the last approver on the PAR form, the user can approve the PAR and act upon the PAR in one step.
  - Currently, only human resource users can perform the interceptor functions and access the PAR by searching for individual PAR forms.

### **Appointment Status Updates and Defaults During the PAR Process**

- When acting upon a PAR for an employee with exempt or any type of OPS status, the status expiration date will default to 12/31/9999.
- When acting upon a PAR for a SES/SMS employee, probationary status can no longer be assigned as the appointment status.
- When acting upon a PAR that appoints a Career Service employee to probationary status, the status expiration date will automatically populate based on the probationary period assigned to the position in Org Management. Upon saving the Appointment Status screen during the PAR process, a future dated permanent status record will be created with an effective date the day following the expiration date and a 12/31/9999 end date. For example, if the employee has a probationary status expiration date of 10/02/2015 saved during the PAR, a new record with permanent status will be created with a begin date of 10/03/2015 and an end date of 12/31/9999. Creating a new permanent record eliminates the need for status change PARs to move employees from probationary to permanent status.
- Human resource users (assigned security role code A, H, U, X or Y) will have the ability to update the Appointment Status screen through direct entry.
- The Appointment Status PAR will no longer be an option under Employee Actions since human resource users (assigned security role code A, H, U, X or Y) will have the ability to make updates directly to the Appointment Status screen. Current employees with a probation appointment status record will have a future dated permanent record created. The permanent record will be created with an effective date the day following the current probationary status expiration date.
- Lateral and Legislative Directed Transfer appointments will not update the Appointment Status screen. When these types of PARs are completed, the employee's appointment status screen will remain the same (i.e., it will be copied and maintained).
- The Appointment Status screen will include two new fields titled Probationary Start Date and Probation Extension Date. The two new fields will only be available for employees on probationary status. The Probationary Start Date field will populate based on an employee being placed in probationary status. The date populated will be equal to the

effective date on the Appointment Status screen and will not be editable. The Probation Extension Date field can only be updated when a probationary period needs to be extended. Once the field is updated, the permanent record will be updated to start the day after the date entered in the Probation Extension Date field.

- Retention Points, Retention Points Calculation Date, Contract Length and Function Code fields will be removed (no longer shown) on the Appointment Status screen.
- Overlap and Temporary status codes will no longer be options when assigning an appointment status.
- Refer to the [Appointment Status Details](#) instructional guide for detailed information on the Appointment Status screen.

### **DROP/Retirement Code Defaults During the PAR Process**

- Additional defaults will be put in place to ensure the employee maintains the proper retirement code when appointment PARs are processed.
  - Anytime an employee has a DROP (DP) retirement code, an appointment to a new position will result in the employee retaining the DROP code.
  - When an employee has a retirement code that begins with P, Q, R or U, an appointment to a new position will change the employee's retirement code. The beginning letter of the existing retirement code (i.e., P or U) will remain unchanged and the second value will be updated to match the second value of the position's default retirement code (e.g., an employee with a PA retirement code being appointed into a HM position will be assigned a new retirement code of PM).
  - When an employee is appointed into an OPS position (Employee Group 4 or 5) assigned to Employee Subgroup K – AmeriCorps, the retirement code will default to ZZ.
  - The default retirement code will be HM for positions assigned to Employee Group 05 – Elected/Appointed, with class 9675 – Judge of Compensation Claims or class 9681 – Deputy Chief Judge of Compensation Claims assigned.

### **PAR Audit Report**

- Implement a new PAR Audit Report. The report is designed to assist human resource users (assigned security role code A, H, U, X or Y) in tracking and monitoring PARs. The report will replace reports previously provided by the People First Service Center. The PAR Audit Report can be accessed from the Management tab > Reports > HR Reports > PAR Audit Report. Refer to the [PAR Audit Report](#) instructional guide for detailed information on this report. The following are the available selection filters and examples of some of the report fields:
  - Selection Filters:
    - PAR Effective Date (to and from)
    - PAR Status
    - PAR Form Number
    - Employee ID
    - FLAIR Org Code (to and from)
    - PAR Created On Date (to and from)
  - Report Fields (includes the majority of PAR form fields – not all fields are shown):
    - Name (first name, last name)
    - Employee ID

- Position (to and from)
- Agency (to and from)
- Organization Unit (to and from)
- FLAIR Org (to and from)
- Location Information (to and from)
- PAR Pending Action By

### **Data Warehouse Updates**

- The Data Warehouse will contain a new view (updated nightly) to capture the PAR Audit Report data. A separate communication will be sent to Data Warehouse users when the view is created (including the view name) and an updated Data Warehouse catalog is published. The following are examples of some of the fields that will be included in the new view:
  - PAR Form Number
  - PAR Action Code
  - PAR Action Reason Code
  - Employee ID
  - User ID
  - PAR Creator Employee ID
  - PAR Approvers
  - PAR Liaison
  - PAR Interceptor
  - PAR Justification/Special Requests (limited to 1,000 characters)
  - PAR Comments (limited to 1,000 characters)
  - Time Stamp of Approvals (shows each approver)
  - Reject Reason
  - Status

If you have **Data Warehouse questions**, contact the People First Data Warehouse team at [PFDWTeam@DMS.MyFlorida.com](mailto:PFDWTeam@DMS.MyFlorida.com).

For People First **system related questions**, contact Steve Eaton at 850-487-4484 or [Stephen.Eaton@DMS.MyFlorida.com](mailto:Stephen.Eaton@DMS.MyFlorida.com).