

Type: System Enhancements	ID Number: SE 80
Date: March 26, 2014 (Updated)	Subject: Org Management Enhancements

Suggested Audience:
Human Resource Offices

Details:

Major system enhancements are being made to the Org Management module within People First. The **enhancements will be implemented on April 7, 2012**, and include the following changes:

Search - Position Maintenance and Actions Screens

- New "Search by Employee" functionality added to allow users to search for a position by employee name (first and last name) or user ID/employee ID. The new search is available on the Position Maintenance and Actions screens and works the same as the search on the "My Direct Reports" screen.
 - This new search will only work for active employees and will return the position they hold as of the current system date.
- Two new columns, "Emp Name" and "Emp ID", added to the search results table to display the position holder's name and employee ID.
- Search results can be sorted by clicking on the column headings (Pos Title, Pos ID, Emp ID, Emp Name, Org Code, Org Desc and Job Type) in the search results table.

Search - Organization Maintenance Screen

- New org codes created will display, along with the existing Org Units, in ascending order by org code. Prior to the 04/07/2012 release, new org codes were presented on the last page of the search results table.
- Search results can be sorted by clicking on the column headings (Org Code, Org Abbreviation, Org Description, FLAIR Org Code) in the search results table.

Reclassify Position - Actions Screen

- The position screens will be presented in the following order during the reclassify position action:
 - Object Maintenance
 - Object Relationships: Belongs to Org Unit
 - Object Relationships: Is Described by Broadband/Class
 - Object Relationships: Reports to Position
 - Employee Group/Subgroup
 - Position Funding
 - Position Attributes
 - Additional Attributes
 - Pay Additives (screen will no longer be presented for OPS positions)
 - License/Certification

- Example 3: During direct entry (Position Funding screen), an effective date of 01/18/2012 is used. The state financial codes will default based on HR org code 72888888888888888888888888888888. In this example, using an effective date of 01/01/2012 or later will have the same result.
 - If the "edit" button is selected during direct entry (Org Management > Position Maintenance), the state financial codes on the position's active Positioning Funding record will be presented. The state financial code fields will **not** populate with the default codes (from Org Maintenance > State Org Financial Data screen) based on the HR org code assigned.
 - License/Certification/State Property Screen - The two info types (State Property, License and Certification) will be presented as separate screens during the reclassify position action. If the position being reclassified has an active state property and/or license and certification record, the record(s) will be end dated one day before the effective date of the position action. The end dated record will be presented in the Overview section during the position action and the user will be able to create a new record if needed.

Delete Organizational Unit - Actions Screen

- Prevent an HR org code from being deleted (abolished) if it has any HR org code reporting to it (parent to child relationship) or positions assigned to it. If a user attempts to abolish an HR org code with an HR org code(s) or position(s) assigned to it, an error message will be presented. The active HR org code(s) or positions(s) will have to be removed before the HR org code can be abolished.

Create OPS Position - Actions Screen

- Employee Group/Subgroup Screen:
 - Employee Group must be selected before Employee Subgroup options are available in the dropdown menu.
 - Only "4 - Included OPS" and "5 - Excluded OPS" will be presented in the Employee Group dropdown menu.
 - This functionality will not occur during direct entry (only through the action) in the Position Maintenance screen.
 - The "3 – SCS-Special Category" is not valid for OPS positions and will no longer be presented in the Employee Subgroup dropdown menu.

Position Attributes Screen - Position Maintenance

- Unless otherwise indicated, the enhancements to the screen apply to direct entry (using "new button") and when the screen is presented during an "establish/create" position action.
- The following fields are not valid for OPS positions and **will no longer display** on the screen. The fields will show as blank (null) in the data warehouse.
 - Pay Plan
 - Class Code
 - The working title (Object Maintenance) will be the only title captured in the data warehouse and displayed on canned reports.
 - Exempt2 Category

- CBU
- Occupation Group
- Fill Priority
- SES Criteria
- Probationary Period
- Special Risk Retirement (checkbox)
- Shared Indicator (checkbox)
- Pay Grade field - this field will systematically populate based on the Class/Broadband and Pay Plan assigned to the position. When the functionality goes live, all current position records will display the Pay Grade.
 - Field will not display for OPS positions.
- Pay Band field - this field will systematically populate based on the Broadband, Class and Pay Plan (based on the Broadband Crosswalk) assigned to the position. When the functionality goes live, all current position records will display the Pay Band.
 - Field will only display for positions in Pay Plan 01, 07, 08 or 09.
 - Field will not display for OPS positions.

Additional Attributes Screen - Position Maintenance

- Unless otherwise indicated, the enhancements to the screen apply to direct entry (using "new" button) and when the screen is presented during an "establish/create" position action.
- Number of Pay Periods field has been removed.
- Default Work Schedule field
 - Field is not editable (grayed out) for OPS positions; it will always be presented blank. A mass load will be processed to change the Default Work Schedule field for all OPS positions to blank.
 - The only option presented in the dropdown menu for salaried positions will be "5-08 - Five days a week/8 hours a day". A mass load will be processed to change the Default Work Schedule field for all salaries positions to "5-08 - Five days a week/8 hours a day."
- FLSA Work Period field
 - The following periods have been removed from the dropdown menu:
 - 41 - Mon-Sun Default 40 HR FLSA Week
 - 81 - DMA 14 Day 86 HR FLSA Period
 - 82 - DMA 14 Day 106 HR FLSA Period
 - FLSA period will default as follows, with the user having the ability to change the defaults before saving:
 - For "1 - Included" and "4 - Included OPS", the period will default to "40 - FRI-THU Default 40 HR FLSA Week".
 - For "2 - Excluded" and "5 - Excluded OPS", the period will default blank.
- DL Class field - required indicator has been removed for OPS positions; field will continue to be required for salaried positions.
- Security Check Level field
 - The current "1 - Background Investigation Required" description is being re-titled "1 - State of Florida FDLE Background".

- The current "2 - Background and Fingerprint Required" description is being re-titled "2 - National FBI Background".
- The current "3 - Fingerprint Investigation Required" is being eliminated and will no longer show in the dropdown menu.
 - Positions that have an active record with the current "3 - Fingerprint Investigation Required" assigned will be systematically changed to "2 - National FBI Background".
- All descriptions on active position records will be systematically updated to show the new descriptions. The old titles will remain on historical records.

Alternate FLAIR Acct Code Screen - Position Maintenance

- The CJIP FLAIR Acct field has been removed. The CJIP FLAIR Account Code must be maintained on the employee's CJIP record.
- When data is entered in the "On Call FLAIR Acct" or "Overtime FLAIR Acct" fields, the system will check the FLAIR Account Code table to determine if code is valid. If code is not valid, an error message will be presented.

FLAIR Account Code

- There will no longer be an effective date associated with the FLAIR Account Code when it is received (nightly feed) from the Department of Financial Services. Once loaded in People First, the FLAIR Account Code can be assigned to a position or organization using any effective date, as long as it is within the current requirement of two pay periods back.

Work Contact Information Screen - Work Information Maintenance

- Implement a New Work Contact Information screen. The new screen will be located under the Work Information Maintenance menu.
- The new screen will include the employee's work e-mail address, work mailing address and work location address on the new screen.
- Work e-mail address will be maintained from the Work Contact Information screen. No changes were made to the e-mail address security (role codes) for updating the e-mail address.
- The work mailing address and work location address data is view only from the new screen. Updates to these addresses will continue to be made from the Org Management>>Position Maintenance>>Addresses screen.
 - The fields on the Work Location Address screen have been changed to remove the reference to "number" in the titles. The new field titles are:
 - 411 Phone
 - 411 Phone Extension
 - Fax
 - Cell
 - Alternate Phone
 - Alternate Phone Extension
- This new screen will be presented during appointment and separation PAR actions.
- Remove the current Email Address, Work Mailing Address and Work Location Address options on the Work Information Maintenance menu.

Background Check, Background Check - Abuse Case and Fingerprints Screens - Work Information Maintenance

- End Date field is being added to all three employee security screens (Background Check, Background Check - Abuse Case and Fingerprints) and will be used to capture the employee's security rescreening date (see "Security Alerts" below).
 - Only when an active (most recent) record is edited or a new record is created, will the End Date field be required. The record cannot be saved until the field is populated.
 - When the "edit" or "new" button is selected, the End Date will default to blank.
 - End Date must be after the Date Submitted or Date Completed.
- Security Check Level dropdown menu options on the Background Check screen will be re-titled to match the security descriptions on the position side (as described above for "Security Check Level field").
- No change is being made to the drug screening alerts; these alerts will continue to be triggered based on the number of rescreen months assigned on the employee's record.

Security Alerts

- Alerts will be generated based on the security check being required on the position (Additional Attributes screen) and the end date on the employee's Background Check, Background Check – Abuse Case or Fingerprints record.
 - If position is assigned "1 - State of Florida FDLE Background" in the Security Level Check field (Additional Attributes screen), then only the employee's Background Check record will be used to determine if an alert should be generated.
 - If position is assigned "2 - National FBI Background" in the Security Level Check field (Additional Attributes screen), then both the employee's Background Check and Fingerprints records will be used to determine if an alert should be generated.
 - If position is assigned "Abuse Screen" indicator (Additional Attributes screen), then only the employee's Background Check – Abuse Case record will be used to determine if alert should be generated.
 - No Level 1 or Level 2 alert will be sent if the Security Check Level field on the position has "0 – No Security Screen Required", even if the employee's security record has an end date.
 - No Abuse Background check alert will be sent if the "Abuse Screen" indicator is not marked on the position, even if the employee's security record has an end date.
 - Alerts will be sent to the employee's manager. If the manager position is vacant, then alert(s) will be sent to manager's supervisor. If both the manager and manager's supervisor positions are vacant, then alert(s) will be sent to HR staff that are assigned an A, H, U, X and Y security role code.
 - The alerts will only be sent to U and Y role codes for employees that fall within their assigned Org Code Range Allowance (OCRA).
 - The A, H and X role codes will get alerts for all employees.

- There will be two types of security alerts sent:
 - **Expired Alert**
 - Expired Alert (Level 1) – will be sent if the position requires a “1 - State of Florida FDLE Background” and the end date on the employee’s Background Check record is after the system date. For example, if the system date is 03/30/2012, then any end date on or after 03/30/2012 will generate the alert.
 - The alert will read “Position [position number] requires a 1 - State of Florida FDLE Background check. [Employee’s ID and name] security check has expired. The employee should be scheduled for the 1 - State of Florida FDLE Background check immediately. Once the security check is completed, HR should update the system with the completion date.”
 - Expired Alert (Level 2) – will be sent if the position requires a “2 - National FBI Background” and the end date on the employee’s Background Check or Fingerprints record is after the system date. For example, if the system date is 03/30/2012, then any end date on or after 03/30/2012 will generate the alert.
 - The alert will read “Position [position number] requires a 2 - National FBI Background check. [Employee’s ID and name] security check has expired. The employee should be scheduled for the 2 - National FBI Background check immediately. Once the security check is completed, HR should update the system with the completion date.”
 - Even if one record (Background Check or Fingerprints) meets the Expired Alert criteria, an alert is sent.
 - Expired Alert (Abuse) – will be sent if the position requires an “Abuse Screen” and the end date on the employee’s Background Check – Abuse Case record is after the system date. For example, if the system date is 03/30/2012, then any end date on or after 03/30/2012 will generate the alert.
 - The alert will read “Position [position number] requires an Abuse Background check. [Employee’s ID and name] security check has expired. The employee should be scheduled for the Abuse Background check immediately. Once the security check is completed, HR should update the system with the completion date.”
 - Expired alerts will continue to be sent every 30 days (after the initial alert) until the employee’s applicable security record is updated with a new end date.
 - **Rescreen Alert**
 - Rescreen alerts will be sent exactly 30 days before rescreen is due (based on end date on employee record). For example, if the system date is 03/30/2012 and the end date is 04/24/2012, an alert will be generated.

- Rescreen Alert (Level 1) – will be sent if the position requires a “1 - State of Florida FDLE Background” and the end date on the employee’s Background Check record is 30 days before system date.
 - The alert will read “Position [position number] requires a 1 - State of Florida FDLE Background check rescreen. [Employee’s name and ID] should be scheduled for the [type of security level check] check within 30 days. Once the security check rescreen is completed, HR should update the system with the completion date.”
- Rescreen Alert (Level 2) – will be sent if the position requires a “2 - National FBI Background” and the end date on the employee’s Background Check or Fingerprints record is 30 days before system date.
 - The alert will read “Position [position number] requires a 2 - National FBI Background check rescreen. [Employee’s name and ID] should be scheduled for the [type of security level check] check within 30 days. Once the security check rescreen is completed, HR should update the system with the completion date.”
 - Even if one record (Background Check or Fingerprints) meets the Rescreen Alert criteria, an alert is sent.
- Rescreen Alert (Abuse) – will be sent if the position requires an “Abuse Screen” and the end date on the employee’s Background Check – Abuse Case record is 30 days before system date.
 - The alert will read “Position [position number] requires an Abuse Background check rescreen. [Employee’s ID and name] should be scheduled for the Abuse Background check within 30 days. Once the security check rescreen is completed, HR should update the system with the completion date.”

If you have any questions regarding the Org Management enhancements, please contact Cheri Van Gundy at Cheri.VanGundy@DMS.MyFlorida.com or 850-410-3409.