

July 2009

# Employee Update Process

Reference Guide



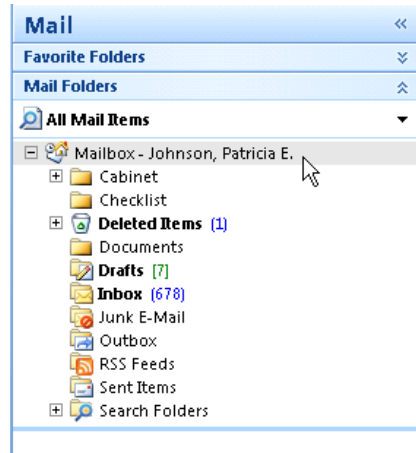
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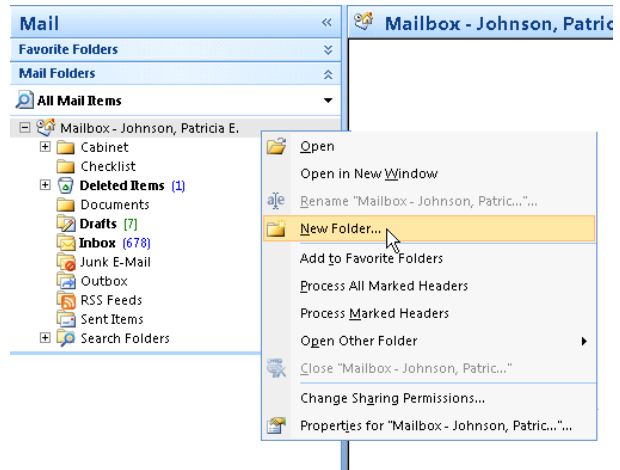
# Employee Update Form

## Create Employee Update Form Folder in Outlook -Five Easy Steps

1. **Open Outlook** and click on “Mailbox – (Your Name)” under Mail Folders to highlight.



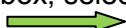
2. **Right click** on your Mailbox and **Select “New Folder.”**



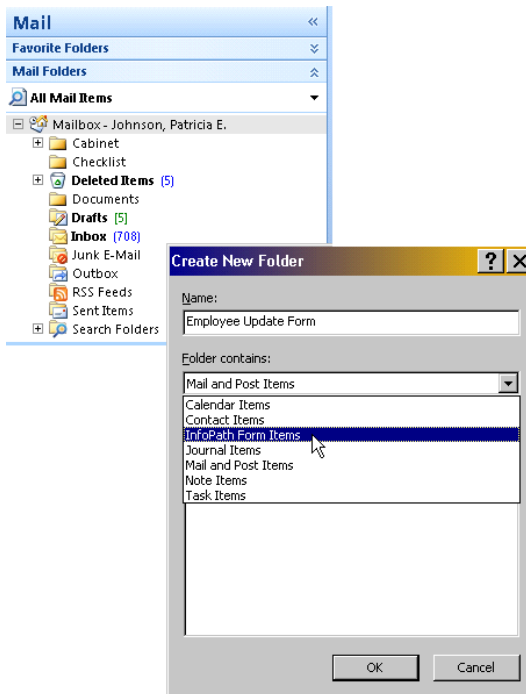
3. Type in **“Employee Update Form”** in the Name Box of the **“Create New Folder”** pop-up box.



4. From the **“Folder contains”** dropdown box, select **“InfoPath Form Items.”**

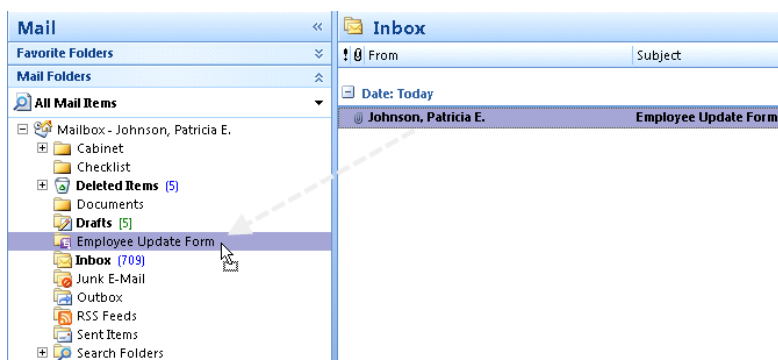


Click the **“OK”** button. You have created the Employee Update Form folder.

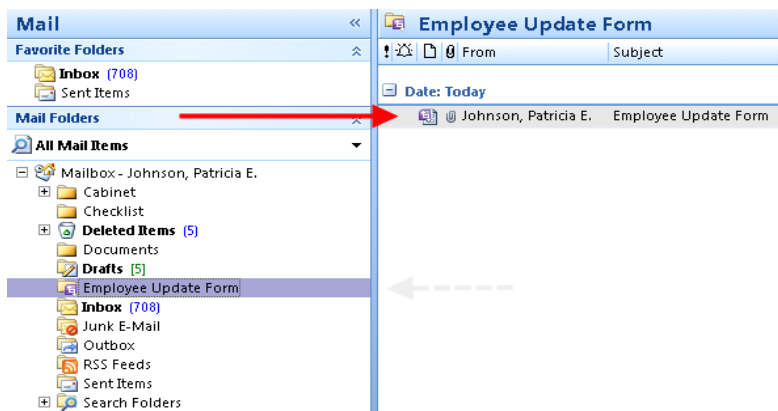


Now you are ready to **DRAG** the Employee Update Form to the Employee Update Form folder you just created.

5. Use your mouse to drag the entire Employee Update Form e-mail to your new Employee Update Form folder.



Your Form will always be available to fill out and submit from the **Employee Update Form** folder in Outlook.



# Form Completion Guide



## Employee Update Form

e-PAFv.2 - July, 2009

### What Are the Required Fields?



1. Employee First Name
2. Employee Last Name
3. Employee ID
4. Entity
5. Effective Date of Update
6. Will this Update fill a job requisition?
7. This Employee is Currently on Leave of Absence
8. This Employee Has Direct Reports
9. Select Updates that Apply
10. Submitter First Name
11. Submitter Last Name
12. Submitter Extension
13. The Submitter is the Employee's Supervisor
14. Employee's Supervisor First Name
15. Employee's Supervisor Last Name
16. Employee's Supervisor Extension

Fields with \* or Dotted Lines are Required to Submit

Employee First Name:  \* Employee Last Name:  \*

Employee ID:  \* Entity:   \*

Effective Date of Update:  \* (mm/dd/yyyy)

Will this Update fill a Job Requisition?  Yes  No  Requisition Number:

This Employee is Currently on Leave of Absence:  Yes  No

This Employee has Direct Reports:  Yes  No

Select Updates that Apply:   \* Comments:

Click Here to Add Another Change for this Employee (up to 4 Maximum)

Submitter First Name:  \* Submitter Last Name:  \*

Submitter Extension:  \*

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name:  \*

Employee's Supervisor Last Name:  \*

Employee's Supervisor Extension:  \*

To Print a File Copy of this Update, click the Printer Icon on the toolbar above.

Human Resources will process only Updates that are approved by the Supervisor ID of the Employee.

If any **Required Fields** are blank (still contain a red \* or red outline), you will receive an error message when you click the "Submit Form" button.



Employee Update Form - Microsoft Office InfoPath

Is the Submitter the Employee's Supervisor? Please select "yes" or "no."

Name: Duck

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name:  \*

Employee's Supervisor Last Name:  \*

Employee's Supervisor Extension:  \*

To Print a File Copy of this Update, click the Printer Icon on the toolbar above.

## How Do I Make My Employee Updates?

Using the Update selection dropdown box, select the Change Type from the list that applies for this employee:

- Demotion
- Earnings Distribution Change
- Job Reclassification
- Multiple-Concurrent
- Paid Leave of Absence
- Pay Rate Change
- Promotion
- Position Change
- Retirement
- Return from Leave of Absence
- Salary/Equity Change
- Status Change
- Supervisor ID Change
- Termination
- Transfer
- Unpaid Leave of Absence
- Other Change – Describe in Comments

Type in Comments related to the Update selected (required for Other Change; optional for all others).

When the Update is selected, checkboxes for additional updates to employee information appear.

When a box is checked for additional data updates, new required fields to be filled out appear.



**Check All Changes that Apply or Additional Changes:**

- Change Rate of Pay
- Change Department, Cost Center, Unit or CODA
- Change Job Code/Title
- Change Earnings Distribution
- Change Supervisor ID
- Change Work Location
- Change Shift
- Change Pay Group
- Change Hours per Shift
- Change Part Time to Full Time or Full Time to Part Time
- Change Temporary to Regular
- Change to Registry
- Change Salary Grade (HR Only)
- Change Other Data (specify in Detail below)

Complete the new required fields.



**Enter Employee ID for New Supervisor:**

Supervisor ID:  \* Supervisor Name:  \*

Select New Location:  \*

Select New Entity/Pay Group:  \*

### What if I Have More Than One Change Type?

To add additional Change Types for this employee,



**Select Updates that Apply:**  **Comments:**

[Click Here to Add Another Change for this Employee \(up to 4 Maximum\)](#)

Click on the “Click Here to Add Another Change for this Employee (up to 4 Maximum)” link below the drop-down box.

A new Change dropdown box appears; repeat instructions above for adding Change Types.



**Select Updates that Apply:**  **Comments:**

[Click Here to Add Another Change for this Employee \(up to 4 Maximum\)](#)

Supervisor:  Yes  No \*

\*

\*

\*

## How Do I Delete a Change Type?

To remove a Change Type, select the dropdown box to be removed.



Select Updates that Apply:	Comments:
Transfer	Type in Comments
Promotion	Type in Comments
<b>Status Change</b>	Type in Comments

Click Here to Add Another Change for this Employee (up to 4 Maximum)

Click on the blue button to the left of the dropdown box.



Select Updates that Apply:	Comments:
Transfer	Type in Comments
Promotion	Type in Comments
<b>Status Change</b>	Type in Comments

Click Here to Add Another Change for this Employee (up to 4 Maximum)

Select and click on "Remove Change."



Select Updates that Apply:	Comments:
Transfer	Type in Comments
Promotion	Type in Comments
<b>Status Change</b>	Type in Comments

Click Here to Add Another Change for this Employee (up to 4 Maximum)

**Additional Changes:**

- Insert Change before
- Insert Change after Ctrl+Enter
- Remove Change**
- Cut Ctrl+X
- Copy Ctrl+C
- Paste Ctrl+V

## What is the Approval/Submission Process?

Employee Updates must be approved by the Employee's Supervisor.



If you are filling out the form (the Submitter) and you are also the Employee's Supervisor who will approve the Update, choose "Yes" for "The Submitter is the Employee's Supervisor."

Submitter First Name: Donald      Submitter Last Name: Duck  
 Submitter Extension: 2-0000

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name: \*  
 Employee's Supervisor Last Name: \*  
 Employee's Supervisor Extension: \*

To Print a File Copy of this Update, click the Printer Icon on the toolbar above.      Submit Form

Verify that you as the Submitter (the person filling out the form) are also the Employee's Supervisor who is approving the Update by clicking the checkbox. Type in your Employee ID and your name as "Signature."

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name: Donald  
 Employee's Supervisor Last Name: Duck  
 Employee's Supervisor Extension: 2-0000

Click the "Submit Form" button to send the form to Human Resources for processing.



**Supervisor Approval**

The Submitter is the Employee's Supervisor and can approve this update:

Supervisor's Employee ID: 1234567      Approval Signature: Donald Duck

Approval Date: 4/22/2009

To Print a File Copy of this Update, click the Printer Icon on the toolbar above.      Submit Form

If you are filling out the form (the Submitter) and you are NOT the Employee's Supervisor who will approve the Update, choose "No" for "The Submitter is the Employee's Supervisor."

Submitter First Name: Donald      Submitter Last Name: Duck  
Submitter Extension: 2-0000

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name:  \*

Employee's Supervisor Last Name:  \*

Employee's Supervisor Extension:  \*

Type in the Supervisor's name and work phone information.

Submitter First Name: Donald      Submitter Last Name: Duck  
Submitter Extension: 2-0000

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name: Mickey

Employee's Supervisor Last Name: Mouse

Employee's Supervisor Extension: 6-0000

The Supervisor's complete e-mail address is required to forward.

Supervisor's Email Address: micky.mouse@emoryhealthcare.org

Confirm Email Address:  \*

An e-mail confirmation box is required to ensure that the Supervisor's e-mail address is correct and has been typed with no errors.

Submitter Extension:

The Submitter is the Employee's Supervisor:  Yes  No

Employee's Supervisor First Name: Mickey

Employee's Supervisor Last Name: Mouse

Employee's Supervisor Extension: 6-0000

Supervisor's Email Address: mickymouse@emoryhealthcare.org

Confirm Email Address: micky.mouse@emoryhealthcare.org

**Employee Update Form - Microsoft Office InfoPath**

Email Addresses Must Match  
Email addresses do not match. Please try again.

OK

The boxes must match for the Form to be submitted.

Supervisor's Email Address: mickymouse@emoryhealthcare.org

Confirm Email Address: micky.mouse@emoryhealthcare.org

After the e-mailed Form arrives in the the Supervisor's Outlook Inbox, the Form is approved by opening the e-mail and clicking the "I have reviewed and approved this Employee Update" checkbox.

**Supervisor Approval**

I have reviewed and approved this Employee Update

Supervisor's Employee ID: 1234567      Signature: Mickey Mouse

Date: 4/22/2009

The Supervisor's Employee ID and name typed as "Signature" are required.

To Print a File Copy of this Update, click the Printer Icon on the toolbar above.      Submit Form

Click the Submit Form" button to forward to Human Resources for processing.

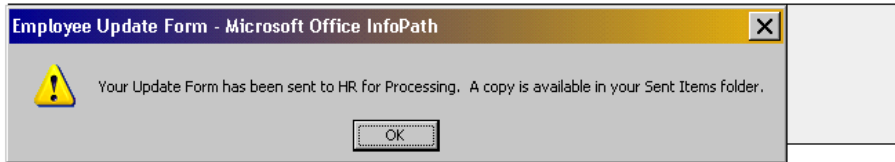
## How Will I Know if My Form Has Been Sent?

When the "Submit Form" button is clicked and the Form has no required fields that are blank,



you will see a message indicating that your Form has been sent by e-mail to either the Employee's Supervisor for approval or to HR for processing.

A copy will be available in your Sent Items folder in Outlook.



Supervisor Approval	
The Submitter is the Employee's Supervisor and can approve this update: <input checked="" type="checkbox"/>	
Supervisor's Employee ID: 1234567	Approval Signature: Mickey Mouse
Approval Date: 5/5/2009	

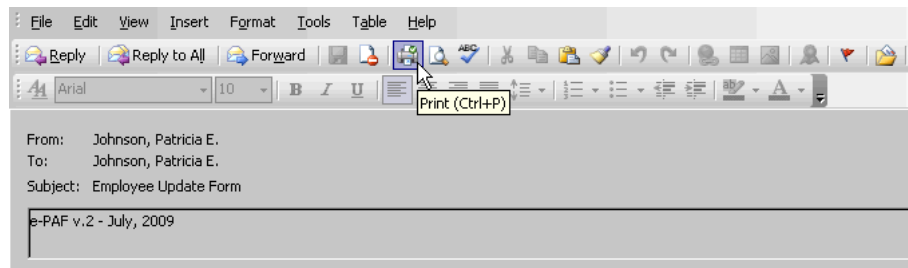
To Print a File Copy of this Update, click the Printer Icon on the toolbar above.

Submit Form

## How do I Print a Copy of My Form?



Before clicking the "Submit Form" button to send for approval or processing, click on the Print button on the Outlook toolbar to print a file copy of the Update.



You can also print a file copy from your Sent Items folder in Outlook.



## Employee Update Form





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Fields with \* or Dotted Lines are Required to Submit

Employee First Name:	<input type="text"/>	*	Employee Last Name:	<input type="text"/>	*
Employee ID:	<input type="text"/>	*	Entity:	Select...	*
Effective Date of Update:	<input type="text"/>	*	<small>(mm/dd/yyyy)</small>		
Will this Update fill a Job Requisition?	<input type="radio"/>	Yes	<input type="radio"/>	No	Requisition Number: <input type="text"/>

## Where Does My Approved Form Go After I Submit?

Based on the Change Type and employee updates you have selected, your Form automatically routes to the appropriate Human Resources group for processing when you click the "Submit Form" button:

<p>If the <b>Update fills a Job Requisition</b>, your Form is sent to Recruitment and Retention for processing.</p>  <p><b>Recruitment and Retention</b></p>	<p>If the Update <b>involves PAY</b>, your Form is sent to the Human Resources Compensation group for processing.</p>  <p><b>Compensation</b></p>	<p>If the Update involves an employee who is currently on <b>Leave of Absence</b> or who will be either going on or returning from Leave of Absence, your Form is sent to the Leave of Absence Manager for processing.</p>  <p><b>Leave of Absence Manager</b></p>	<p>All <b>OTHER</b> Updates are sent to the Human Resources Data Services group for processing.</p>  <p><b>Data Services</b></p>
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*For additional information on Update Form processing, see pages 11-14.*

**Note:** Human Resources will process only Updates that are approved by the supervisor of the employee.

## Who Do I Contact for Questions About My Form?

Questions regarding the status of your Form should be sent to the e-mail addresses below.

If your question pertains to:

- Recruitment and Retention, send to: HR Recruitment, EHC ([EHC.RECRUIT@emoryhealthcare.org](mailto:EHC.RECRUIT@emoryhealthcare.org))
- Compensation, send to: HR Compensation, EHC ([EHC.HRComp@emoryhealthcare.org](mailto:EHC.HRComp@emoryhealthcare.org))
- Leave of Absence, send to: HR Leave of Absence, EHC ([EHC.LOA@emoryhealthcare.org](mailto:EHC.LOA@emoryhealthcare.org))
- Data Services, send to: HR Data Services, EHC ([EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org))

All other questions can be sent to Data Services at HR Data Services, EHC ([EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org)).

## Service Level Agreements

EMORY HEALTHCARE Data Services will make every effort to process Employee Update Forms within the pay period of receipt of the form. Employee Update Forms must be received no later than noon on Wednesday of the effective pay period for the employee change. Employee Update Forms received after the Wednesday noon deadline will be processed within the next pay period.

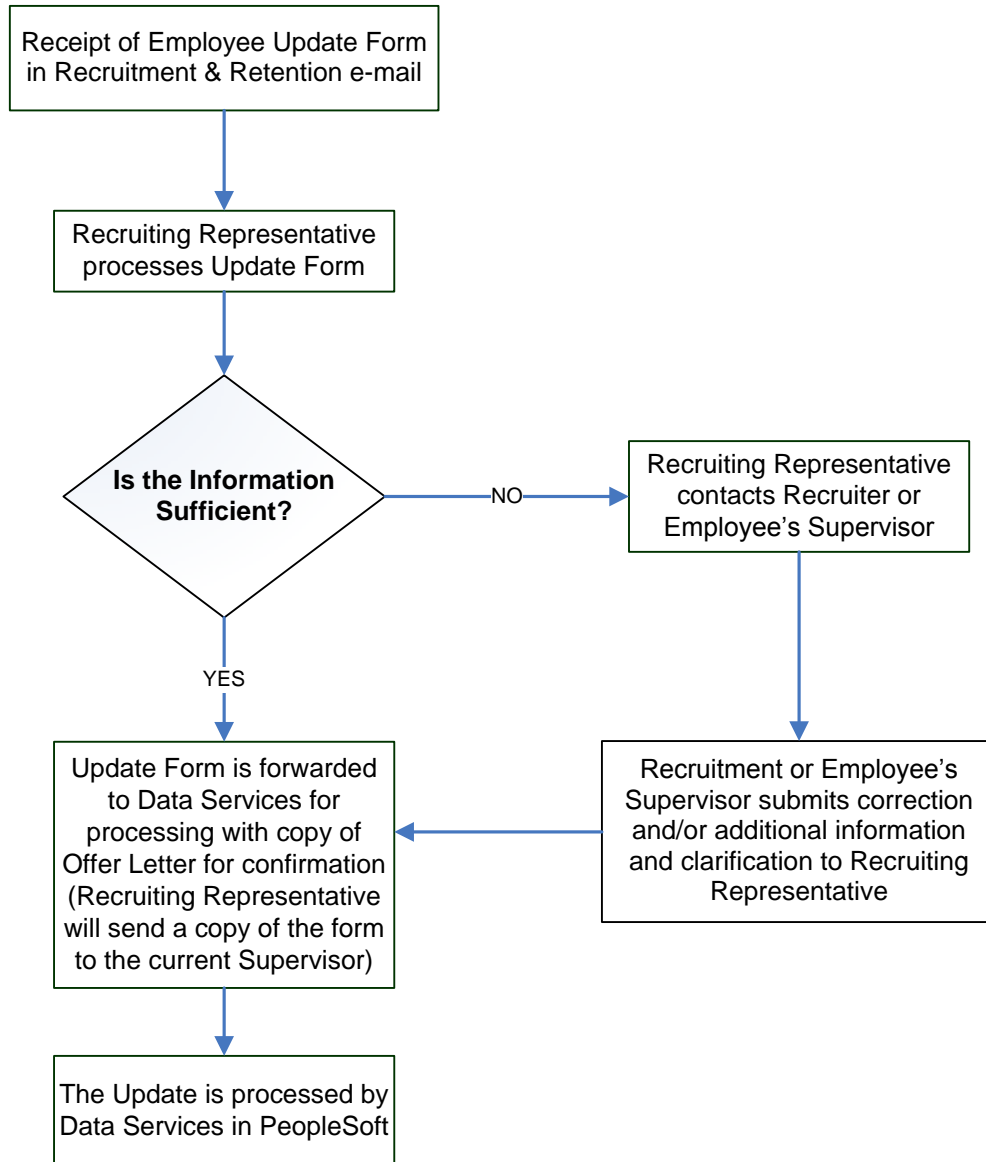
In order for the Employee Update Form to be processed within the pay period of its receipt, it is critical for the following steps to occur; otherwise, it may delay timely processing of the form. Below are the service level agreements for each of the Human Resources areas that are responsible for approving and/or processing the form.

- 1) **HR Recruitment & Retention:** All Employee Update Forms created due to a recruitment requisition, must *first* be routed to the Recruitment and Retention e-mail account, [EHC.RECRUIT@emoryhealthcare.org](mailto:EHC.RECRUIT@emoryhealthcare.org), for review approval. Recruitment and Retention will be responsible for routing the form within 3 business days of its receipt to HR Data Services at [EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org) to be processed. *Examples: Promotions, Transfers or Status Changes that require an Employment Requisition.*
- 2) **HR Compensation:** All Employee Update Forms that are not filling a recruitment requisition AND require a pay change, must be routed to the Compensation e-mail account, [EHC.HRComp@emoryhealthcare.org](mailto:EHC.HRComp@emoryhealthcare.org), for review and approval. Compensation will be responsible for routing the form within 5 business days of its receipt to HR Data Services at [EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org) for processing. *Examples: Promotions and demotions and previously approved compensation-related requests. Any other compensation-related requests not previously approved by Compensation will be reviewed on a case-by-case basis and the 5 business day service level agreement may not be applicable. A member of Compensation will contact the employee's supervisor regarding the specifics of their request.*
- 3) **HR Leave Administration:** All Employee Update Forms that are created to either place an employee on a leave of absence or return an employee from a leave of absence must be routed to the Leave of Absence e-mail account, [EHC.LOA@emoryhealthcare.org](mailto:EHC.LOA@emoryhealthcare.org), for approval and processing. The form will be processed by Leave Administration within 5 business days of its receipt. *Examples: FMLA, medical leave without pay, personal leave, military leave or educational leave.*
- 4) **HR Data Services:** All Employee Update Forms that do NOT fall into one of the three categories above must be routed to the HR Data Services e-mail account at [EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org) to be processed. All Employee Update Forms must be received by noon on the Wednesday before the pay period ends in order for it to be processed before the payroll deadline on Friday. *Examples: Supervisor ID or reviewing manager, earnings distribution, or other miscellaneous changes.*

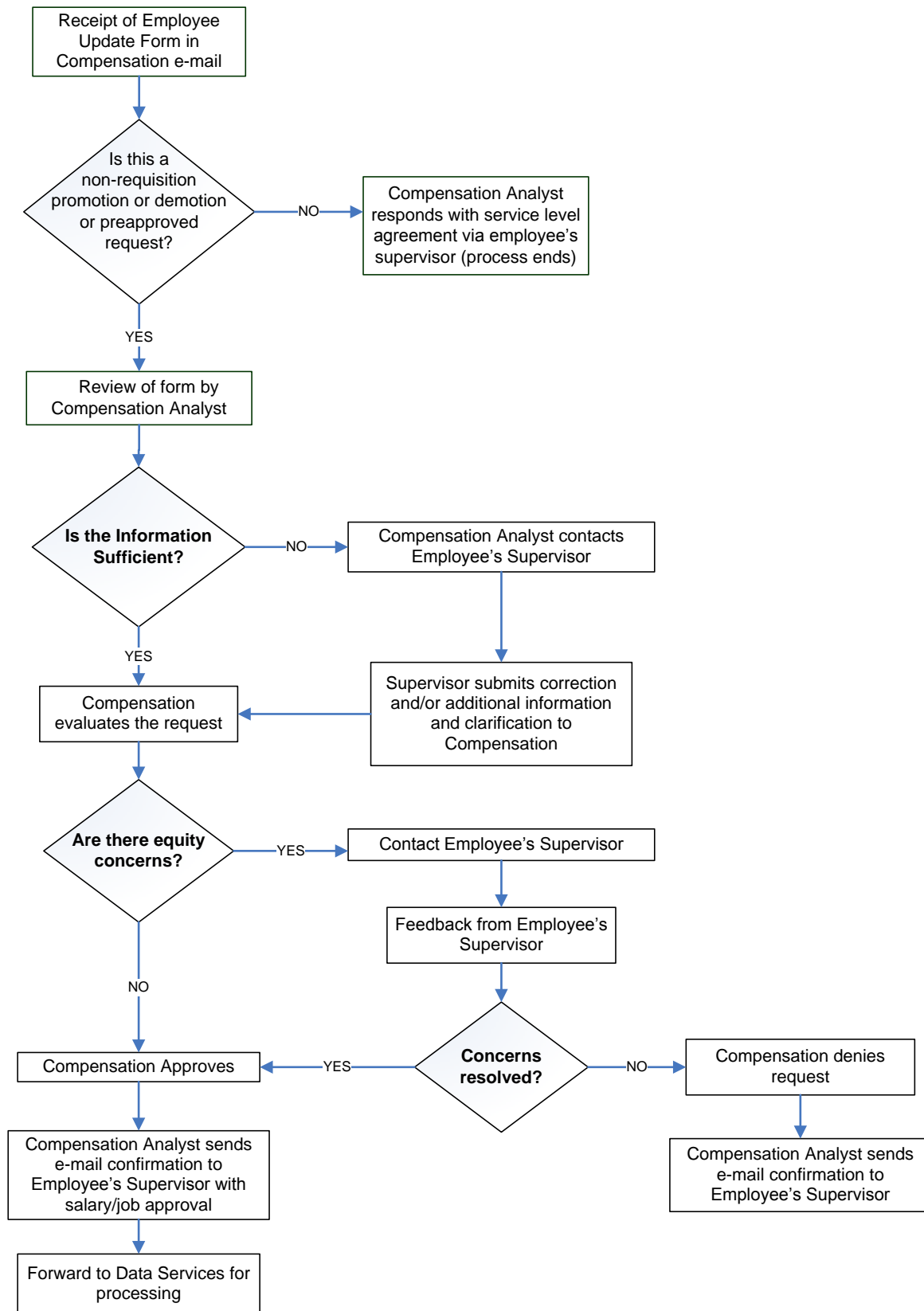
Employee Update Forms must be submitted by the approving supervisor thoroughly and accurately. Incomplete forms, misrouted forms or forms not received by the Wednesday noon deadline will only delay the process of the form being completed by the effective pay day. Incomplete forms received by Compensation, Recruitment & Retention, Leave of Absence or Data Services may require the supervisor to provide additional information for the form to be processed.

# Employee Update Form Process Workflow

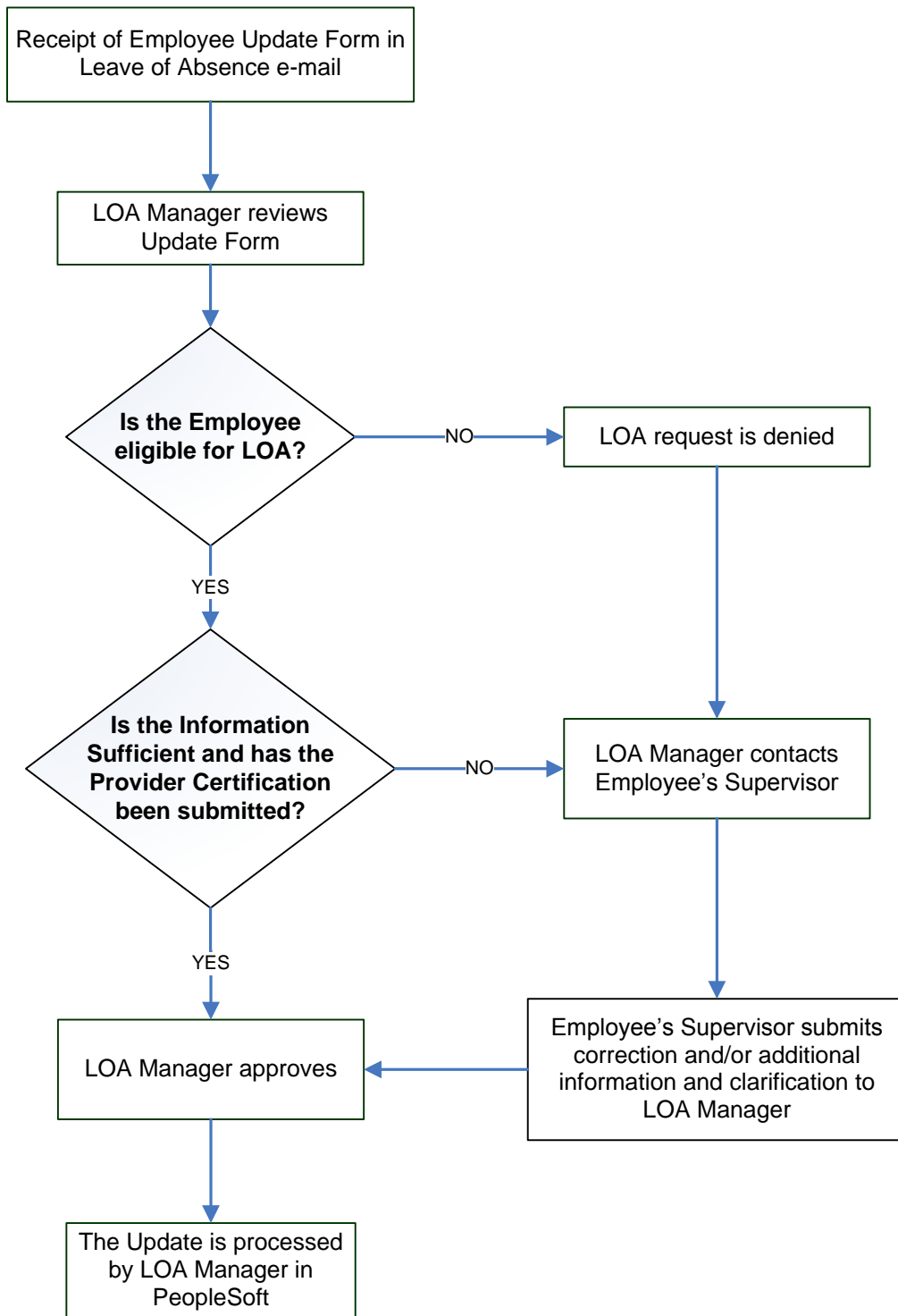
## Recruitment and Retention



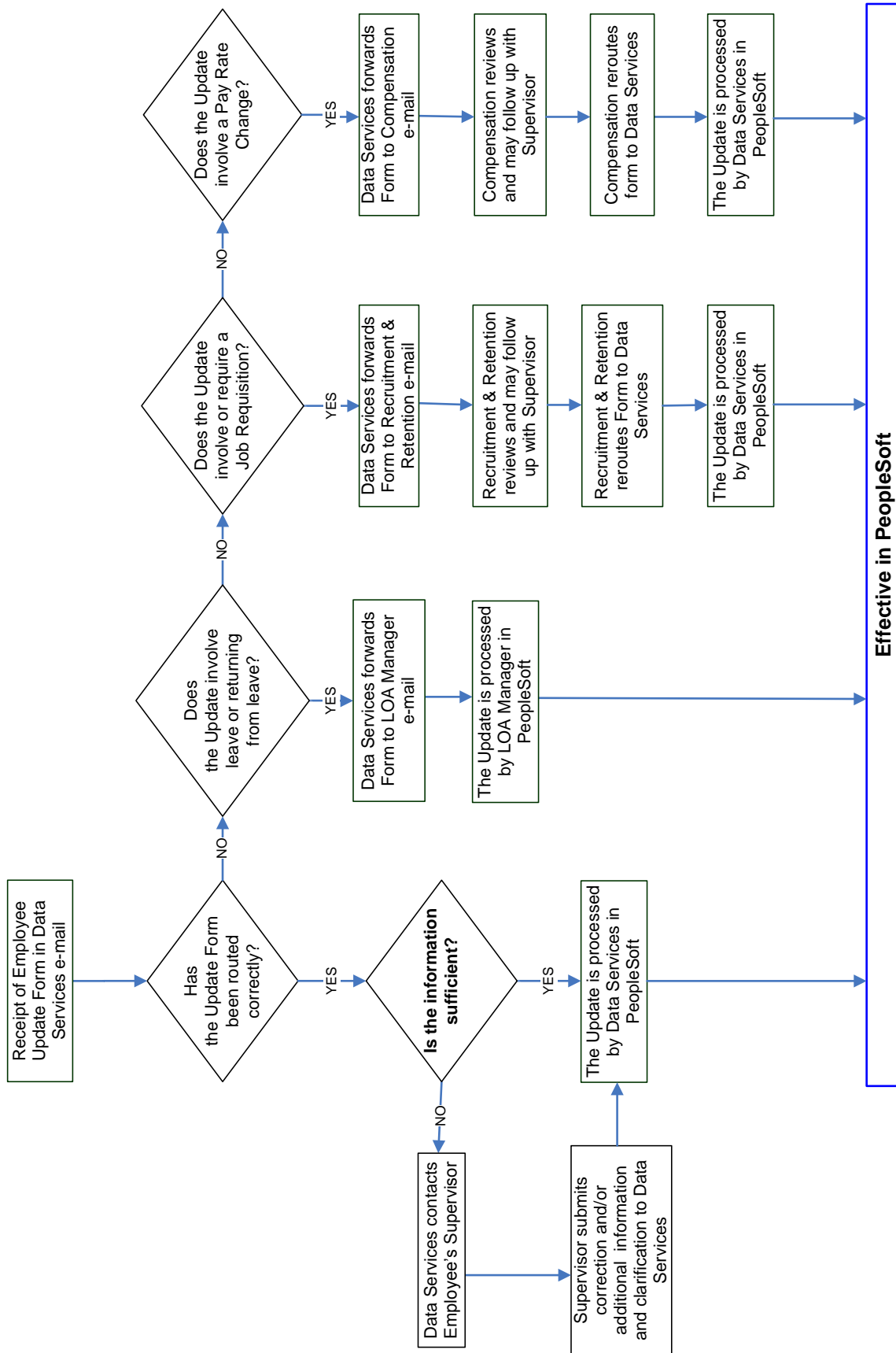
# Compensation



# Leave of Absence



# Data Services



## Glossary

- **Demotion** – A demotion occurs when an employee moves from a position in one job classification to another position classified in a lower pay grade. The original position is left vacant to be filled or eliminated. If the original position is to be filled, an employment requisition must be submitted to Human Resources. The employee's rate of pay is generally decreased based on the guidelines established in the *Salary Administration Policy (Section VII, Part A-3)*.
- **Earnings Distribution** – A change in the allocation of wages to different departments (also called Cost Centers and Units).
- **Internal Transfers** – A change in the employee's department (also called CODA, Section, Cost Center or Unit).
- **Lateral Movement** – A job code change within the same department that does not impact the employee's pay, status or shift
- **Leave of Absence (LOA)** – Changes involving all EHC Leaves of Absence: FMLAs, Medical, Personal, Education, Workers' Compensation, and Military. These include changes from active status to paid (PLA) or unpaid (LOA) leave status; paid leave status (PLA) to unpaid leave status (LOA); and return to work (RFL) to active status. All requests will be processed upon receipt of the appropriate documentation.
- **Multiple Concurrent** – A multiple concurrent job assignment occurs when an employee works in a second assignment that is distinguishable from the primary assignment within EMORY HEALTHCARE and Emory University. The combined assignment must be limited to 60 hours per week. Compensation will consider each assignment for approval on a case-by-case basis. (***Must be approved by Compensation for use***)
- **Pay Rate Change** – A pay rate change is any increase or decrease in the current base pay rate. A pay rate change is a result of one of the following: demotion, promotion, job reclassification, equity review, market adjustment or merit increase. The amount of the pay rate change should be reviewed and approved by Compensation.
- **Required Fields** – All required fields are indicated by a red asterisk next to the required field and are outlined with a broken line around the required field. The form will not show fields that are not required based on the Change Type you select.
- **Return from Leave of Absence (RFL)** – A change process to active working status for an employee that has been in a paid leave of absence or unpaid leave of absence status.
- **Position Change (Job Reclassification)** – A position change or job reclassification occurs when an existing employee's classification is evaluated and moved to the same or a different pay grade due to a significant change in job content. The original position is absorbed into the new position and no vacancy is left as a result of the change. Reclassifications must be based on more than an increase/decrease in work volume and pace or the addition/deletion of minor duties. Job reclassifications may or may not result in a pay rate change.
- **Promotion** – A promotion occurs when an employee moves from a position in one job classification to another existing position classified in a higher pay grade; the original position is left vacant to be filled or eliminated. Only those employees who meet the job qualifications AND have demonstrated levels of acceptable performance according to the standards of the Performance Advantage program are eligible for promotional consideration. If the original position is to be filled, an employment requisition must be submitted to Human Resources. The employee's rate of pay is generally increased based on the guidelines established by the *Salary Administration Policy (Section VII, Part A-3)*.
- **Retirement** – An employee who voluntarily resigns his/her position after reaching appropriate age and years of service with EMORY HEALTHCARE. Eligibility for retirement must be confirmed by the HR Benefits Department.

- **Salary/Equity Change** – A salary/equity change is an adjustment in pay for an employee in which it has been determined the employee does not have the appropriate pay for his or her experience level. This adjustment in pay is reviewed and approved by Compensation.
- **Separation (Termination, Resignation, Retirement, etc.)** – A change resulting in an employee being removed from payroll. This includes voluntary and involuntary terminations, as well as retirement and death.
- **Shift Change** – A change in the shift of an employee among day, evening and night.
- **Status Change** – A change in the number of hours scheduled, from a PRN position or to a PRN position, or from full-time to part-time or vice versa. Some instances may require approval by Compensation.
- **Supervisor ID Change** – A change in the supervisor of an employee. This typically occurs when a supervisor is promoted, transferred or separates from the company and is most commonly used in the administration of Performance Advantage and Employee Commitment reporting.
- **Transfer** – A lateral transfer occurs when an employee is transferred into another position within the same or similar pay grade; the original position is left vacant to be filled or eliminated. This generally will not result in a salary change. If the original position is to be filled, an employment requisition must be submitted to Human Resources.

## Helpful Hints

### ***What is an Employee Update Form?***

An Employee Update Form is the form used to request employee changes at EMORY HEALTHCARE.

### ***How do I obtain the form or get set up to receive the form?***

The Employee Update Form can be obtained by going to the Leader site on [www.eushc.org](http://www.eushc.org).

### ***How do I get access to the Leader site?***

To obtain access to the Leader site you must put in a request through your access coordinator.

### ***Who can I contact if I have questions or encounter technical issues with the form?***

Please contact HR Data Services at the e-mail address or phone numbers below with any questions or if you have any technical issues with the form.

HR Data Services, EHC ([EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org))

TEC/WWC/ESA: 6-6055

EUHM/EHI/ECC: 6-3437

EUH/EUOSH: 6-7832

### ***Who generates the Employee Update Form?***

The Employee's Supervisor determines the need and generates the Employee Update Form. The information entered into the Employee Update Form is based upon the Change Type selected by the department.

### ***How will I know the status of my Employee Update Form?***

You will be notified upon completion of your request. However, if Human Resources is unable to process your request within 10 business days or if additional information is required, you will be contacted by the appropriate Human Resources representative.

### ***What are Change Types?***

Change Types are actions that change an employee record. Specific employee Change Types are defined in the glossary.

### ***What approval(s) are required on the form in order for it to be processed by HR?***

All Employee Update Forms must have the Employee's Supervisor's approval before submission to Human Resources for processing.

### ***What are system error messages?***

Error messages alert users that some required information on the form has not been completed in order to process the form.

### ***How long does it take for the form to be processed?***

Please see the Service Level Agreements on page 10.

### ***Does this Employee have direct reports?***

If yes, please contact your Data Services Representative regarding the employees to be changed.

HR Data Services, EHC ([EHC.HRDATA@emoryhealthcare.org](mailto:EHC.HRDATA@emoryhealthcare.org))

TEC/WWC/ESA: 6-6055

EUHM/EHI/ECC: 6-3437

EUH/EUOSH: 6-7832