PHS Add Employment Instance User Guide

Version 1.0

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Washington, DC 20593

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ADD EMPLOYMENT INSTANCE

Introduction

This section provides procedures for anyone who:

- **Is being hired as a civilian and already has a military employment instance. Or**
- **Is being hired as an officer and already has a civilian employment instance.**

In these cases, a new employment instance will need to be created. Generally, another employment instance is needed when a member was previously hired in Direct Access but is now being hired into PHS in a different sector (i.e. from officer to civilian, civilian to officer, officer to retirement).

Only complete the field entries that are indicated. All other fields are to be left at the default data or blank.

Important: This user guide should only be used if the member already has an employment instance and you wish to add another employment instance (concurrent job). This guide should not be used if the member is being rehired into the same sector (e.g. reenlistment) or is a new hire (does not currently exist in DA). For help with the rehire or new hire process, follow their respective user guides or contact PPC.

Menu Path(s)

Updating Personal Data (if necessary)
Menu Navigation: Workforce Administration > Personal Information > Modify A Person
Portal Pagelet: HR Data Shortcuts

Adding an Employment Instance
Menu Navigation: Workforce Administration > Job Information > Add Employment Instance, or
Portal Pagelet: HR Data Shortcuts

Need Help?

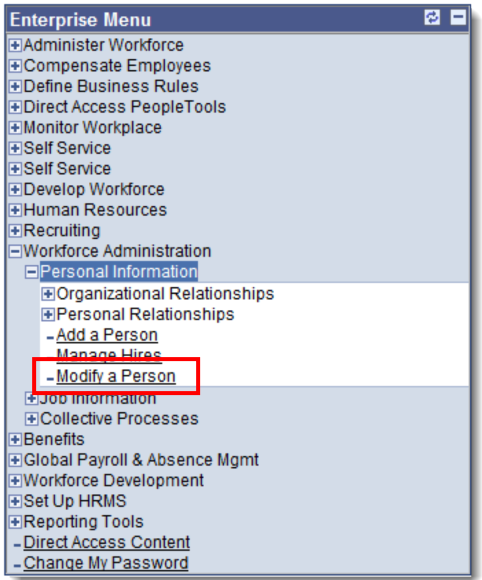
If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- The web address for support is http://www.uscg.mil/ppc/ccb/. There is a link to Customer Care at the bottom of every page of this help file.
- Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
- Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on http://www.uscg.mil/ppc/ccb/.)

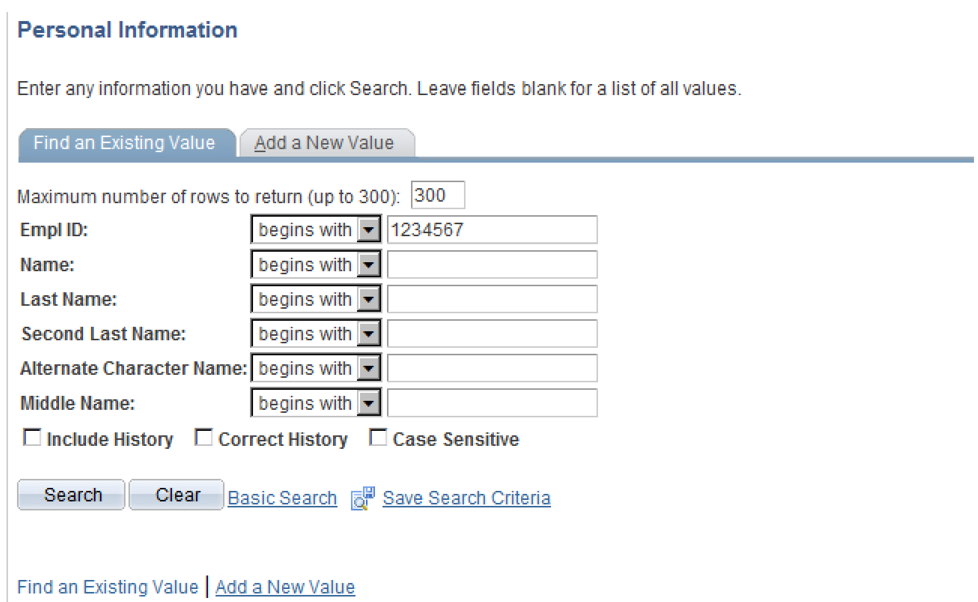
Procedure

The following steps will show you how to update personal data information (if necessary) and an employment instance for an existing member.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>If the member's personal data has changed, use the Modify A Person transaction by clicking the Personal Information link in the HR Data Shortcuts pagelet or by navigating to Workforce Administration > Personal Information > Personal Information > Modify a Person using the menu navigation.



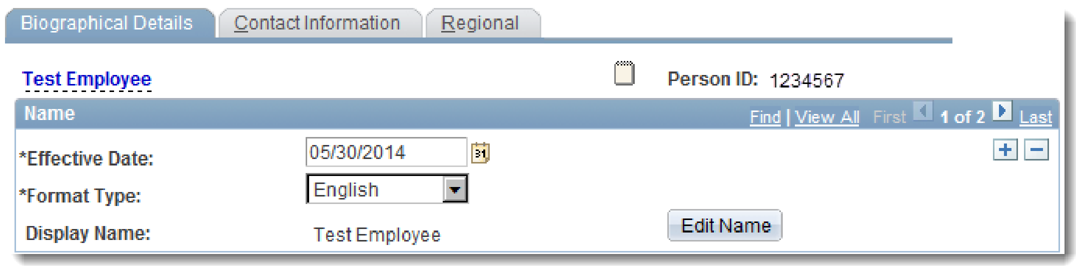
Modifying personal data is optional when adding an employment instance. If no personal data needs to be updated, skip to step 5.</td></tr>
<tr><td>2</td><td>Enter the member's current employee ID in the Empl ID field and click the Search button. If Empl ID is not available, use the other fields to search for the member.

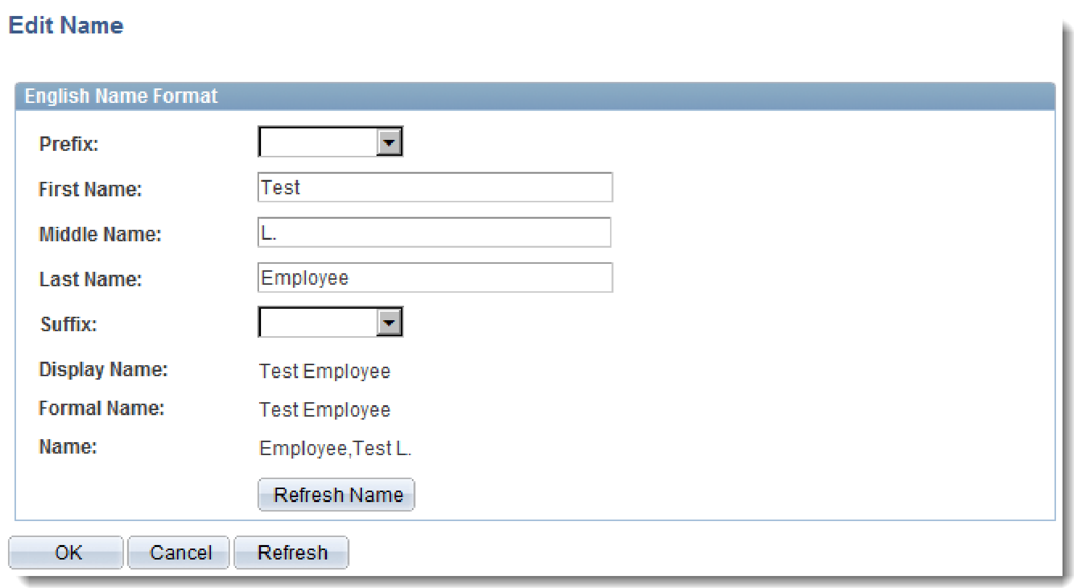

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
To update data in sections that are effective dated (e.g. name, address), insert a new row by clicking the '+' icon. These 'effective date' sections generally pertain to data that could change over time and you wish to retain the history of the changes. When a new row is inserted, the row counter will increase by one and the Effective Date will default to the current date. Effective Date can be changed to a past date but not a future date.

Changes can be made to current or history rows without inserting a new row. However, this should only be done if the initial data was entered incorrectly. Data changed in correction mode will overwrite current data and will not be retained in history. To enter into correction mode, select the Correct History checkbox on the search page or the Correct History button on the Modify A Person pages

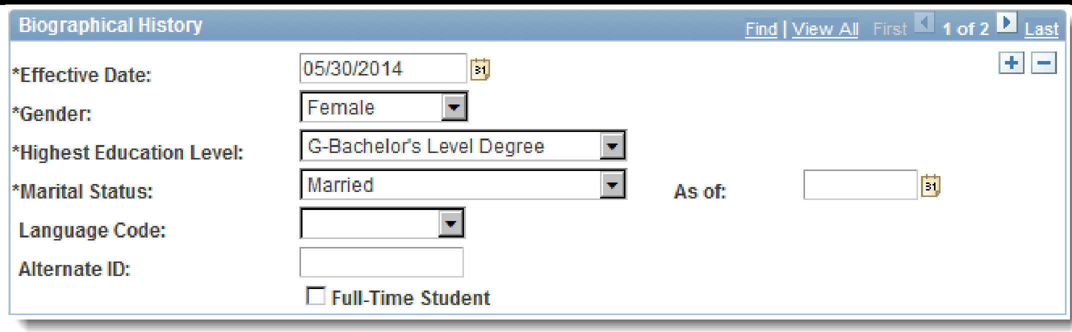
For Name updates, after clicking the '+' icon, click the Edit Name button. Change the necessary data on the Edit Name page and click the OK button.



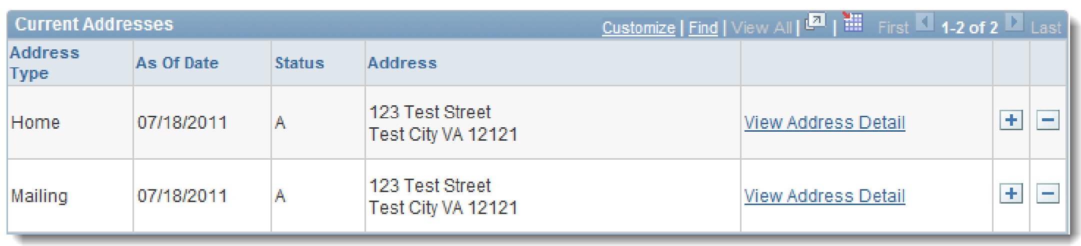


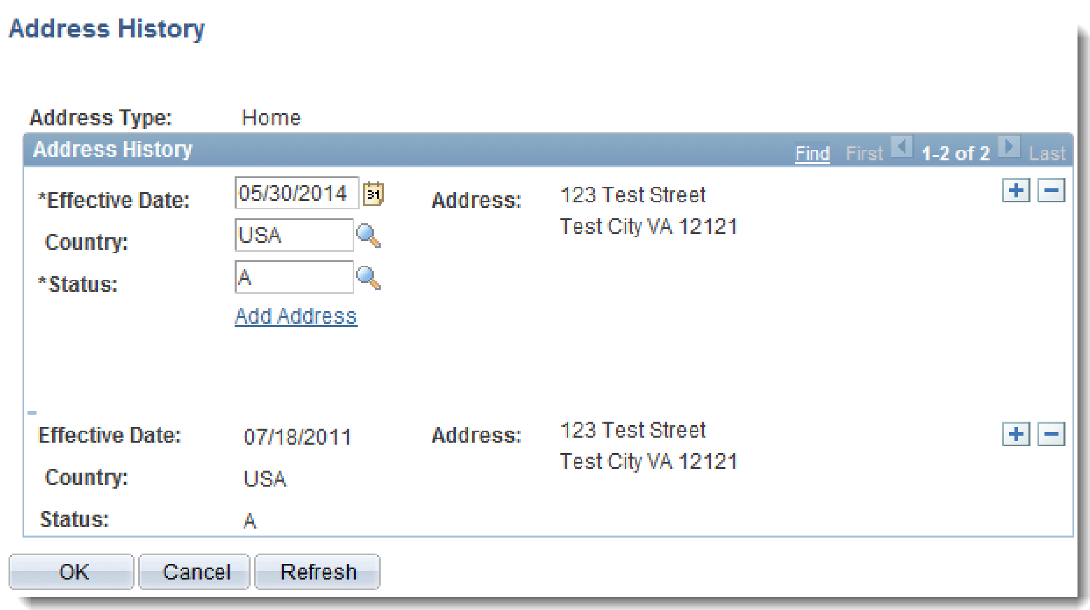
For Biographical History updates, after clicking the '+' icon, change the necessary data directly in the appropriate field(s).
</td></tr>
</table>

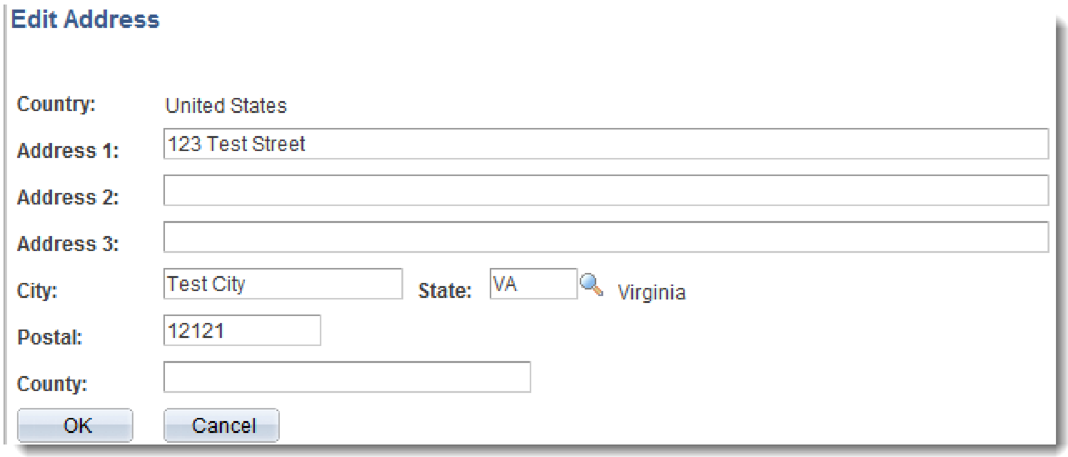
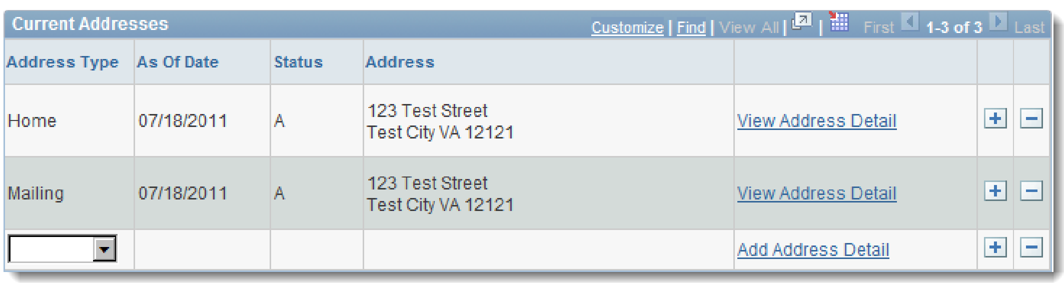
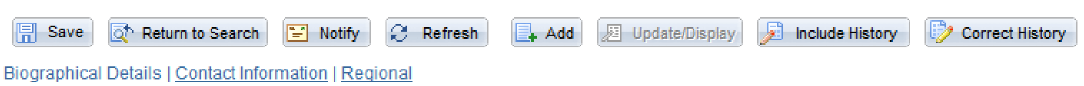
Step	Action

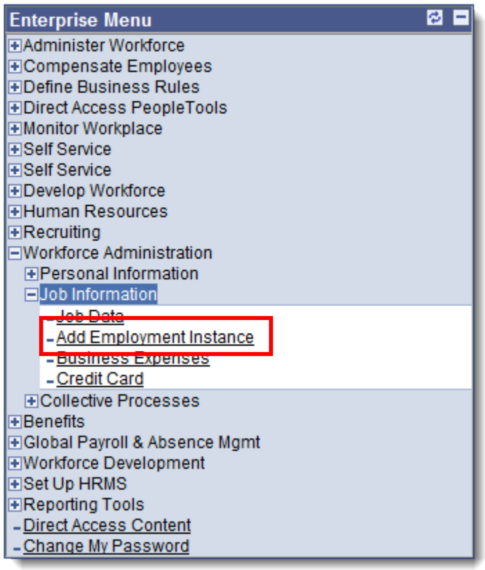
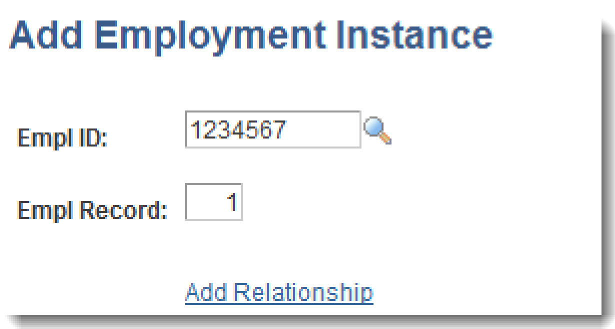


To update an existing address type (e.g. Home, Mailing Address, Home of Record), select the **View Address Detail** link for the address you wish to change in the Current Addresses section. On the Address History page, click the '+' icon to insert a row and select the **Country** (if different than current value). In the new row, click the **Add Address** link. Change the necessary data on the Edit Address page and click the **OK** button.





Step	Action
	 To add a new address type, click the '+' icon in the Current Addresses section to insert a new row. In the new row, select an **Address Type** and click the **Add Address Detail** link. On the Address History page, indicate a Country and click the Add Address link. On the Edit Address page, enter the new address and click the OK button.  For all other sections where inserting a row is not available, update the existing data directly in the field(s). If a section contains '+ -' icons but is not effective dated, insert a row only to add new data (e.g. a new phone type, ethnic group). If the existing data needs to be changed, you can update it directly.
4	Click the **Save** button after all updates have been made or new data have been added. 
5	Return to the Portal Home page and select Add Employment Instance in the **HR Data Shortcuts** pagelet or by navigating to: **Workforce Administration > Job Information** > **Add Employment Instance** using the menu navigation.

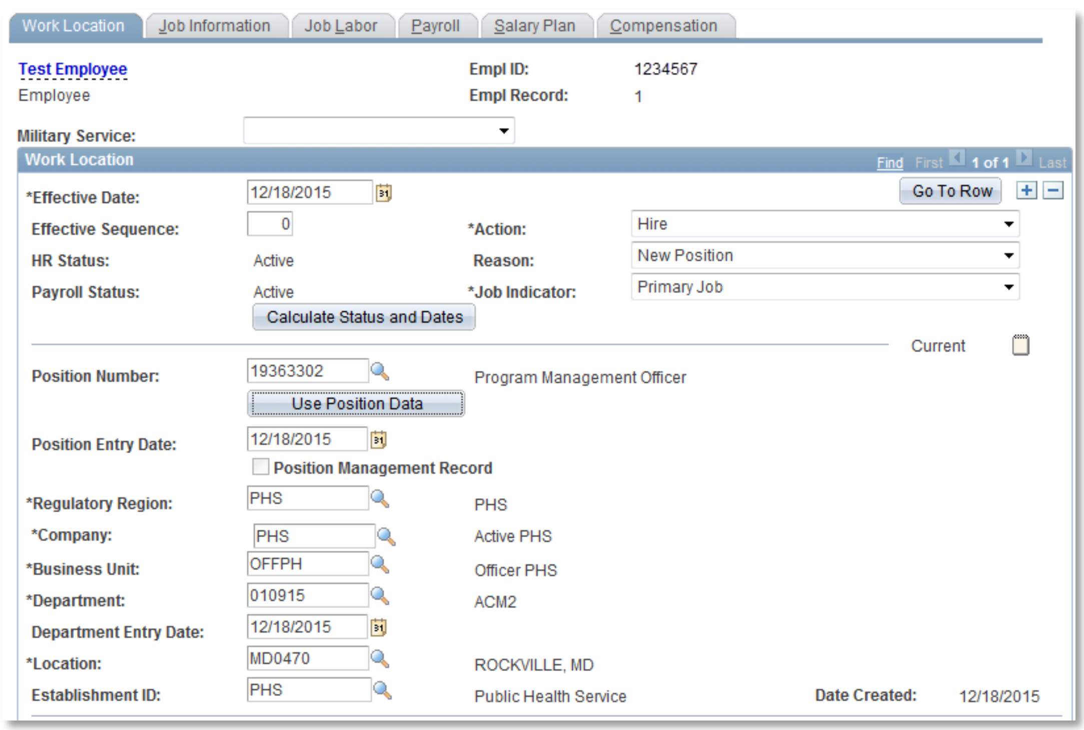
Step	Action
	 
6	On the Add Employment Instance search page: ▪ Indicate the **Empl ID** for whom you are adding an employment instance. If you do not know the Empl ID, click the lookup icon to search for the member's existing Empl ID. Use the Advanced Search feature on the 'Look Up Empl ID' dialog box to use multiple search criteria. ▪ Tab out of the field. The **Empl Record** # will automatically increase to the next sequential number. **!** If Empl Record # remains at 0, this indicates that the Empl ID does not have an existing Job Data row. Check the Empl ID again. If the Empl ID is correct, this means you are adding the initial job data row (vice another employment instance). Stop here and follow the Hire process. If you are unsure, contact PPC. ▪ Click the **Add Relationship** link. 
7	On the Work Location page, enter/select the following data: ▪ **Effective Date** = Defaults to the current date. Enter the date of the first day of employment. This date can be future dated to reflect the actual hire date. ▪ **Action =** Defaults to 'Hire'. Do not change. ▪ **Reason =** Click the drop down list and select the appropriate reason. ▪ **Job Indicator =** Primary (if you receive an error message that the member can have

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
only one primary job, click Ok. This is just a warning message.)
▪ Position Number = Enter the appropriate position number, if applicable. Click on the lookup icon to search for a position.
▪ Position Entry Date = Will default to current date.

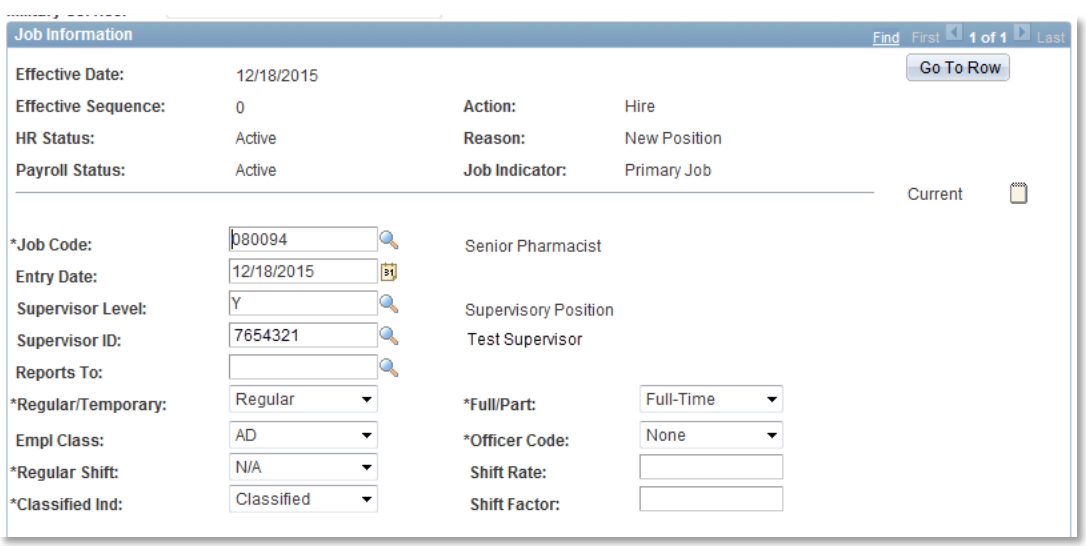
The Regulatory Region, Company, Business Unit, Department, Department Entry Date and Location will default after a position number is entered. If they do not, Click the Override Position Data button and indicate the correct values for these fields individually. Or, if no position is indicated, you must indicate these fields individually as they are required. If needed, click on the lookup icon for each field to search for the correct value.

▪ Regulatory Region = PHS
▪ Company = This value will default from the department entered. If no value defaults from the department, click the look-up icon and select the appropriate value.
▪ Business Unit = Select the appropriate business unit.
▪ Department = Select the appropriate department.
▪ Department Entry Date = Will default to current date.
▪ Location = Select the appropriate location.

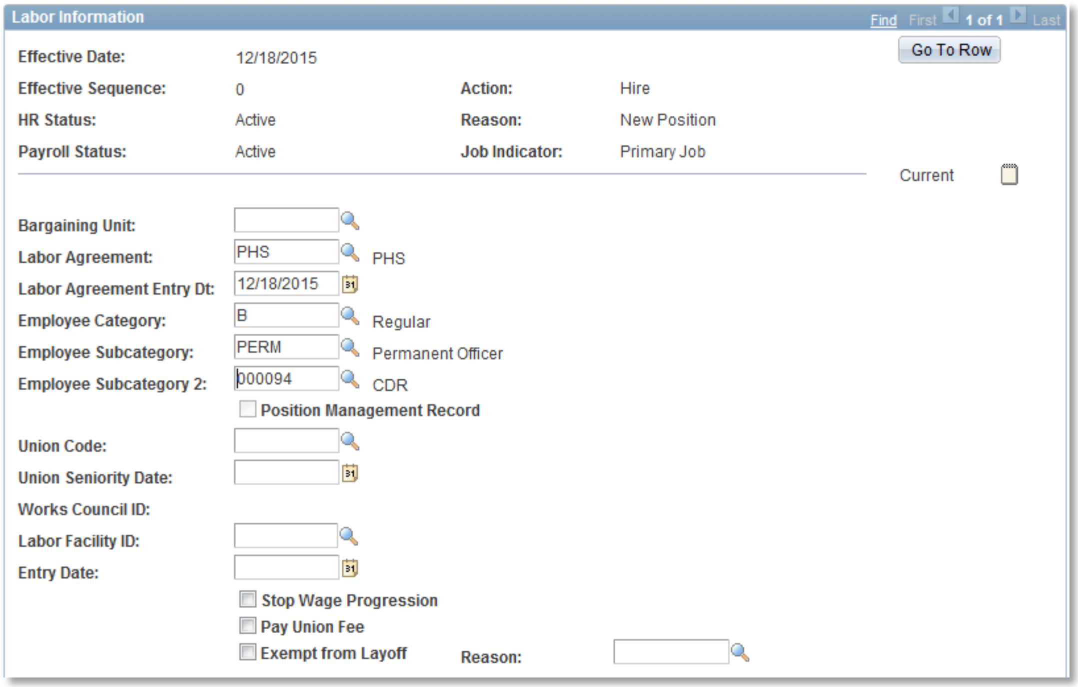
The list of departments, locations, job codes, and salary plan/grade/step that display in their respective fields are based on the Business Unit selected. For example, if you select OFFPH, no CG departments will display.



</td></tr>
<tr><td>8</td><td>
Click on the Job Information tab. On the Job Information page, enter/select the following data:
▪ Job Code (Temp Grade) = Initial value defaults from the Position. Select the appropriate temp grade.
</td></tr>
</table>

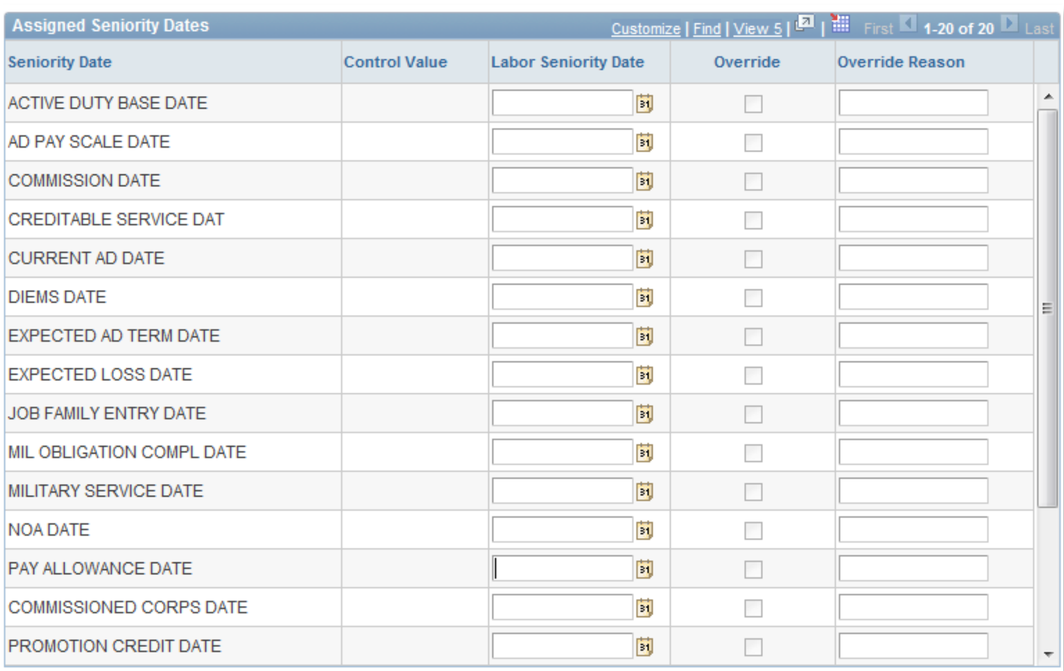
Step	Action
	▪ **Entry Date =** Will default to the Effective Date on the Work Location page. ▪ **Supervisor ID =** Enter/select the empl ID of the supervisor who should approve the employment instance you are adding. Civilians (Reg Region = NOMIL ; Business Unit = CIVPH) do not go through the approval process. Only people with a DA user ID and active job data record can be selected in this field. ▪ **Empl Class =** Select the appropriate Empl Class. Empl Class values are based on the Reg Region selected on the Work Location page. 
9	Click on the **Job Labor** tab. On the Job Labor page, enter/select the following data: ▪ **Labor Agreement = PHS** Labor Agreement values are based on the Reg Region selected on the Work Location page. ▪ **Labor Agreement Entry Dt** = Will default to the Effective Date indicated on the Work Location page. ▪ **Employee Category** = Select the appropriate value ▪ **Employee Subcategory =** PERM ▪ **Employee Subcategory 2 (Perm Grade) =** Select the Perm Grade.

Step	Action



Scroll down to the Assigned Seniority Dates grid and select the **View All** link. If applicable, enter the appropriate dates for each of the Seniority Dates.

The dates that displays in the Assigned Seniority Dates grid are based on the Labor Agreement selected. These dates do not need to be completed when adding a civilian employment instance.

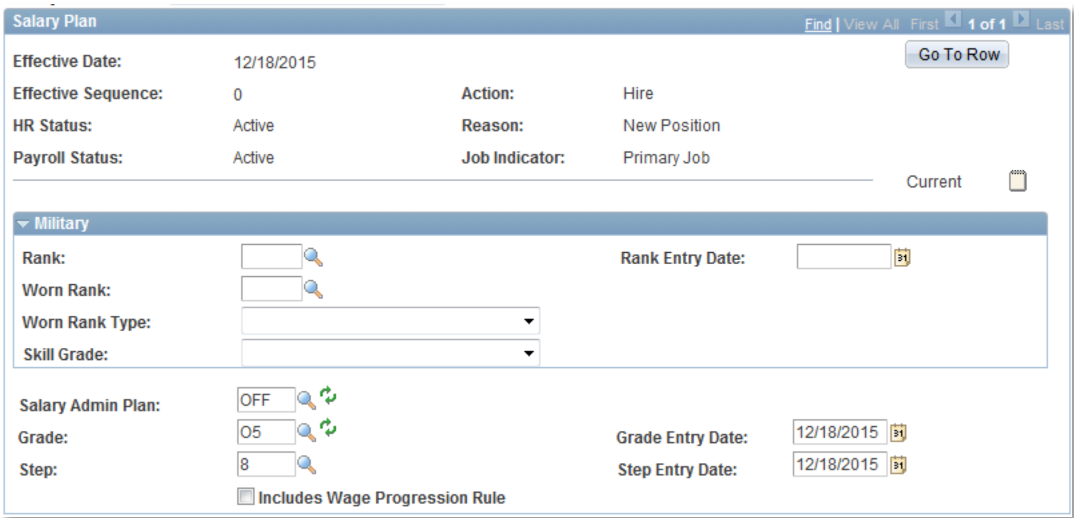


Assigned Seniority Dates — Customize | Find | View 5 | First 1-20 of 20 Last

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE				
AD PAY SCALE DATE				
COMMISSION DATE				
CREDITABLE SERVICE DAT				
CURRENT AD DATE				
DIEMS DATE				
EXPECTED AD TERM DATE				
EXPECTED LOSS DATE				
JOB FAMILY ENTRY DATE				
MIL OBLIGATION COMPL DATE				
MILITARY SERVICE DATE				
NOA DATE				
PAY ALLOWANCE DATE				
COMMISSIONED CORPS DATE				
PROMOTION CREDIT DATE				

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Payroll tab can be skipped.</td></tr>
<tr><td>11</td><td>Click on the Salary Plan tab. On the Salary Plan page, enter/select the following data:

Salary Plan: This defaults from the job code entered on the job information page. If none defaults, enter OFF.
Grade: This defaults from the job code. If none defaults, this means a salary grade has not been linked to the job code. Another job code (that is linked to a salary grade) must be used. If not, you must contact the PHS job code administrator.
Grade Entry Date: Default to the Effective Date on the Work Location page.
Step: Select the appropriate value. The step corresponds to a member's longevity for pay purposes.
Step Entry Date: Default to the Effective Date on the Work Location page.

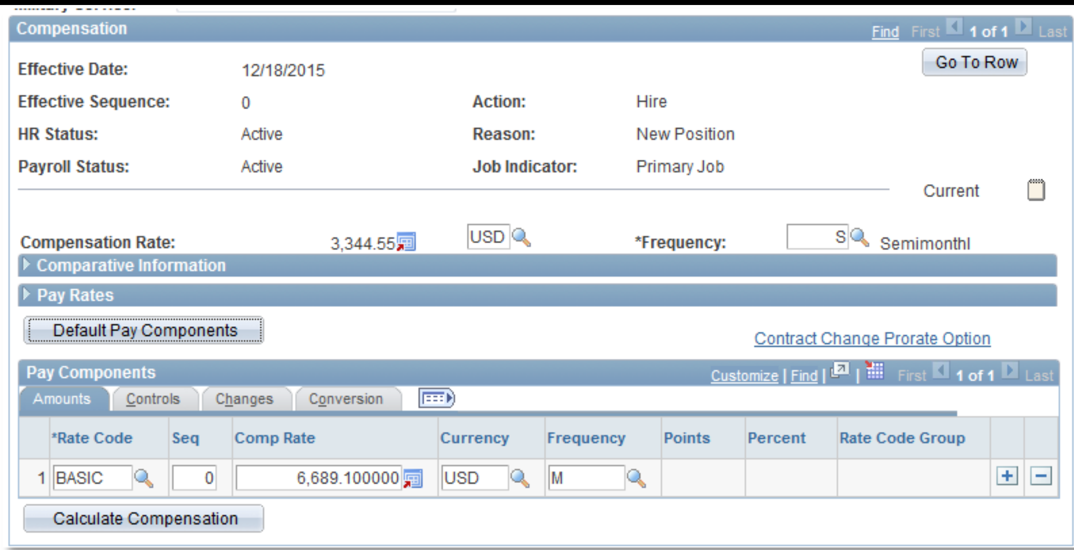


</td></tr>
<tr><td>12</td><td>Click on the Compensation tab. On the Compensation page, enter/select:

Frequency = S
Click the Default Pay Components button. This will default the Pay Rates and Pay Components.

! If the Default Pay Component button is not selected, basic pay data will not be transmitted to Payroll.</td></tr>
</table>

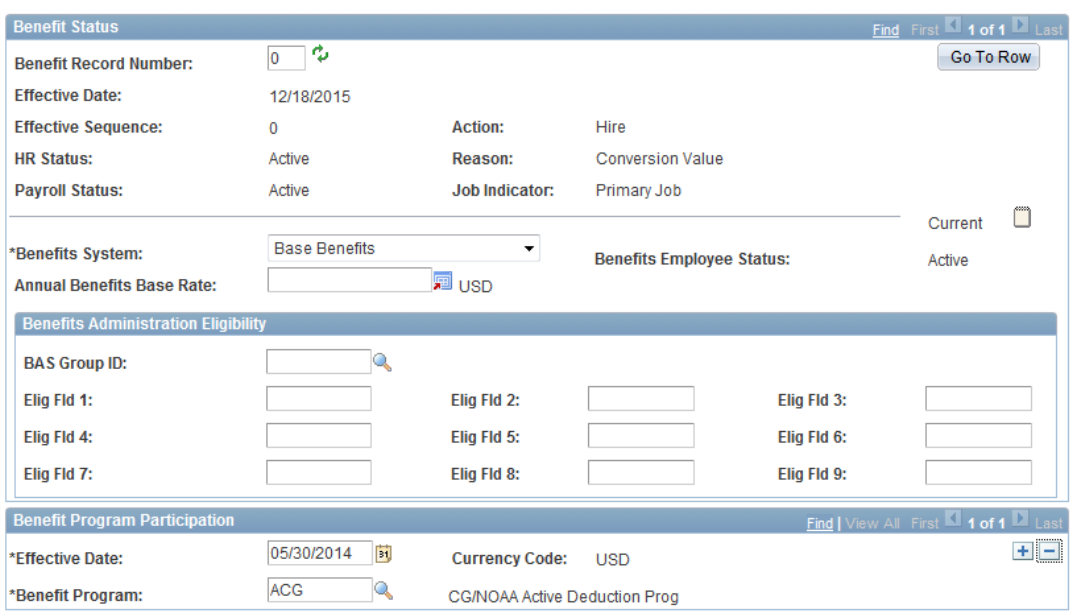
Step	Action



13 Click on the **Benefits Program Participation** link.

On the Benefits Program Participation page, enter/select the following:

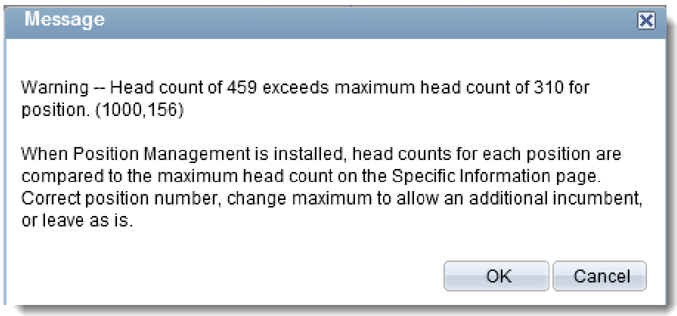
- **Benefits System =** Base Benefits
- **Benefit Program Effective Date =** This will default from the member's Employee Record 0. You may keep this value. If you wish to enter a date to match the effective date of the employment instance you are adding, insert a row by clicking the '+' icon and indicate the date.
- **Benefit Program =** This will default from the member's Employee Record 0. If a new row was inserted above, the value from the prior row will carry forward. There is no need to change this value.

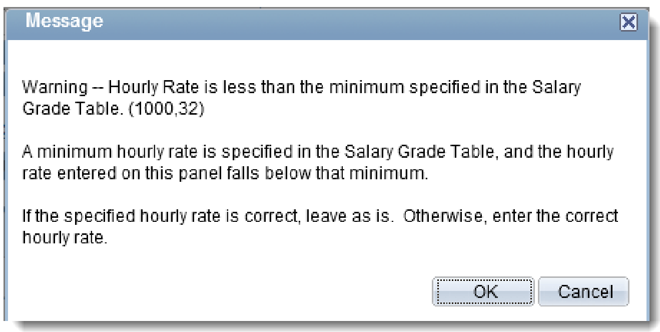


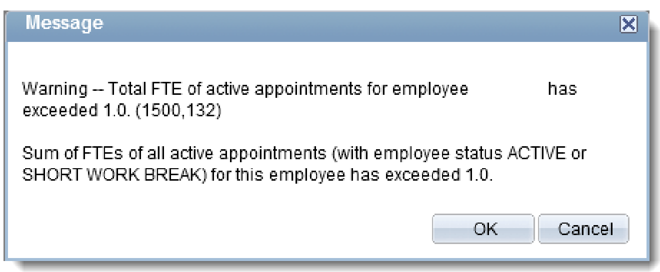
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>

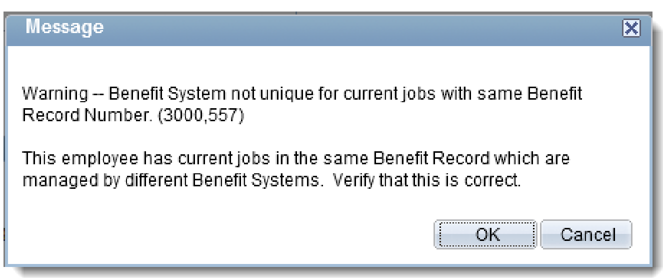
Click the **Save** button.

Upon Save, you will receive some or all of the warning messages below. Click the OK button for each warning message.

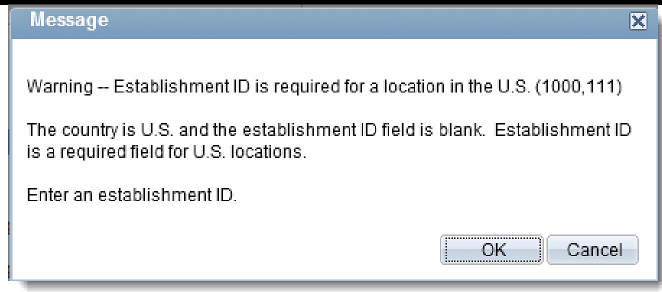
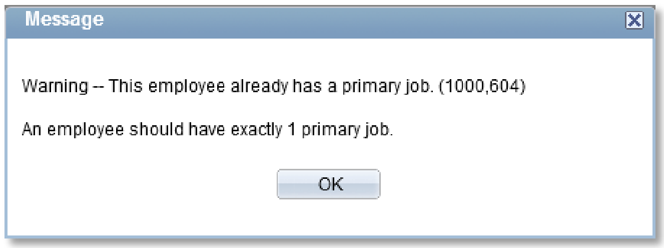








</td></tr>
</table>

Step	Action
	 
15	The request has now submitted to the Supervisor for approval. The pay group will remain in a 'staging' pay group until the new employment record has been approved by the supervisor.

NEW EMPLOYMENT INSTANCE APPROVAL ROUTING

Introduction

This section provides procedures for approving an employment instance.

Only active employees can be indicated as an approver. The approver cannot be the same person as the requestor.

Menu Path(s)

Menu Navigation: Human Resources > Requests > View My Requests
Portal Pagelet: Requests tab > Requests

Need Help?

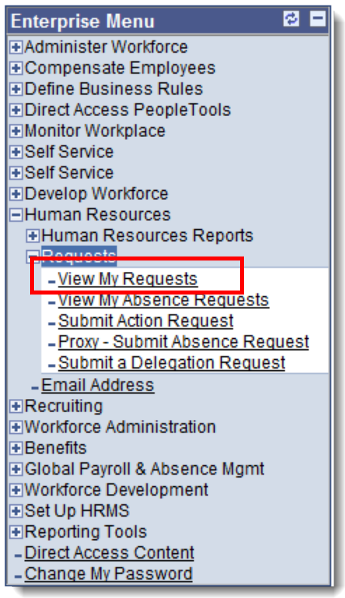
If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

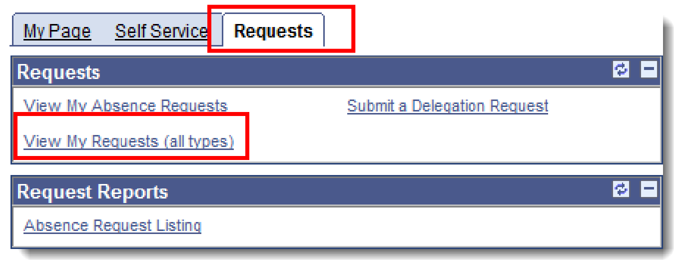
- The web address for support is http://www.uscg.mil/ppc/ccb/. There is a link to Customer Care at the bottom of every page of this help file.
- Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
- Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on http://www.uscg.mil/ppc/ccb/.)

Procedure

Follow the steps below to approve an employment instance request.

Step	Action
1	To approve/deny an employment instance request, navigate to Human Resources > Requests > **View My Requests** using the menu navigation, or click on the **Request** tab and select the **View My Requests (all types)** link in the Requests portal pagelet.

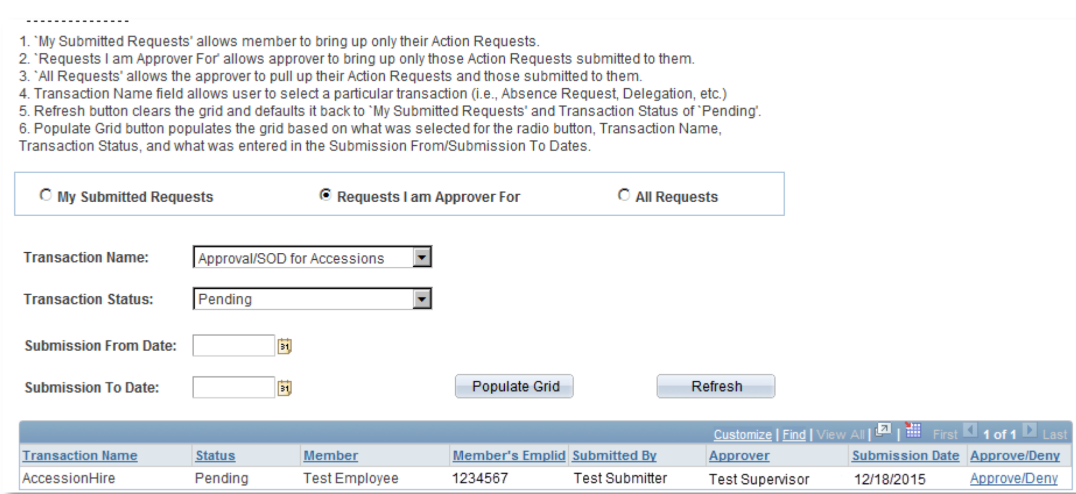


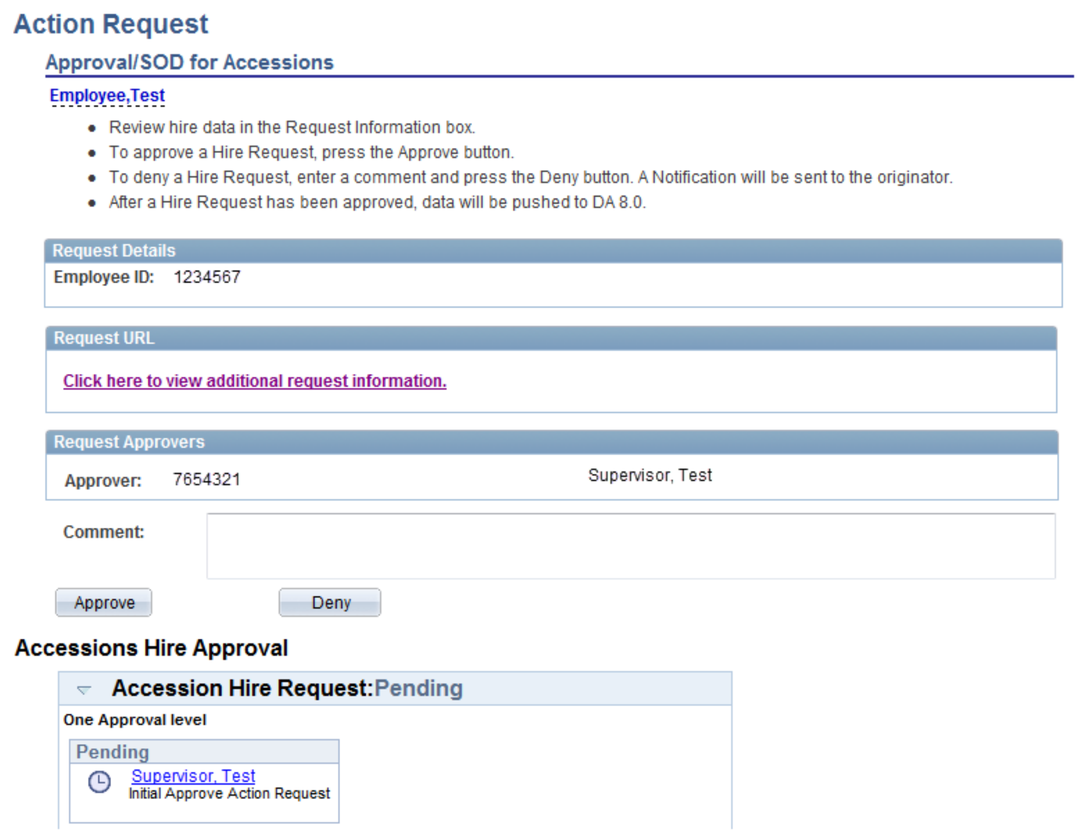


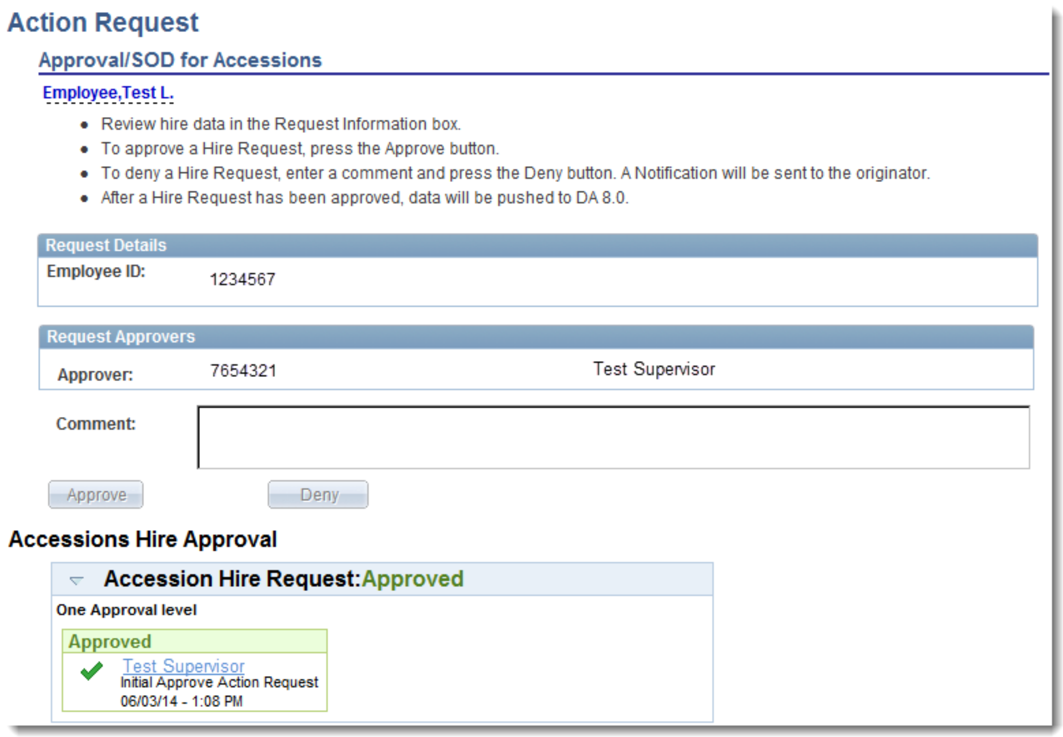
Step	Action
2	On the View My Action Requests page, select:

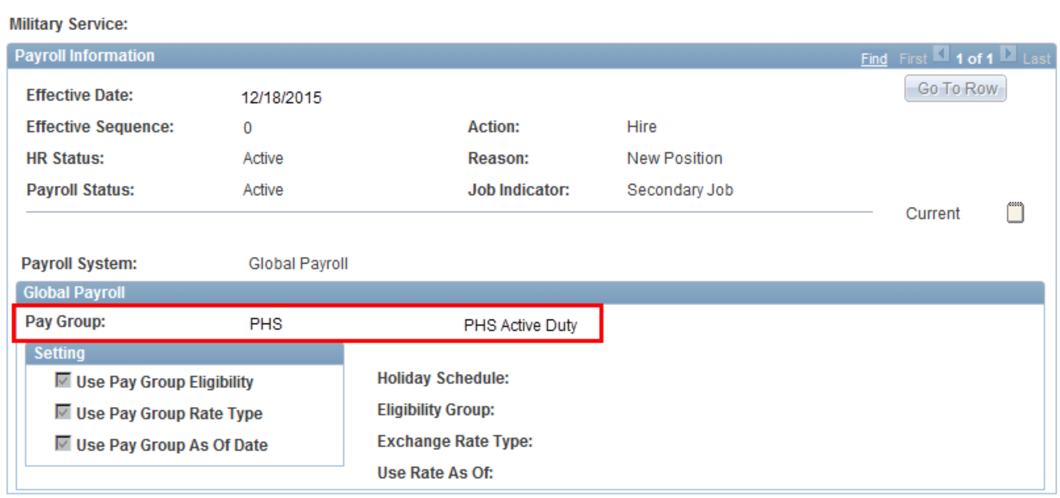
- **Requests I am Approver For** = Yes
- **Transaction Name** = Approval/SOD for Accessions
- **Submission From/To Date** = indicate date range to narrow your search or leave blank to search all.

Click the **Populate Grid** button. A listing of all requests awaiting your approval will be listed. Locate the employment instance request you are approving. **Take note of the Member's Emplid for the next step.**



Step	Action
3	As an approver, you must review/audit the employment instance data. Click the 'Click Here to review additional information' link to view the member's job data (this will open in a new tab). Use the **Modify a Person** transaction in the Core HR portal pagelet to view the member's personal data. Or, navigate to: Workforce Administration > Personal Information > Modify a Person 
4	After the data has been verified, go back to the Update Action Request browser tab, enter any comments for the person who submitted the request (optional) in the Comments field, and click the **Approve** or **Deny** button.
5	If no data is missing, the request is approved and the pay group for the employment instance you added is automatically updated with a valid 'paying' pay group.

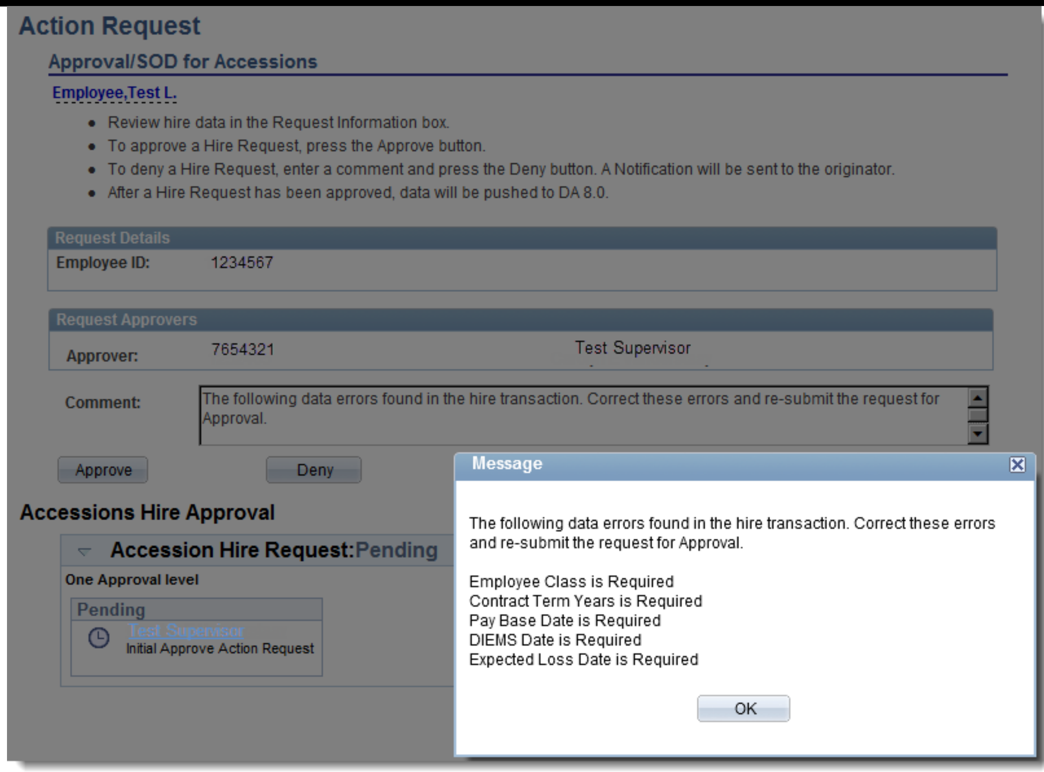
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>




</td></tr>
<tr><td>6</td><td>If any data is missing, an error message will display.

If you receive an error message, deny the request. The data errors are displayed in a message box and the Comments field. Add any additional comments, if necessary. The requestor must then fix the appropriate data and resubmit the request.</td></tr>
</table>

Step	Action



Job Data Corrections

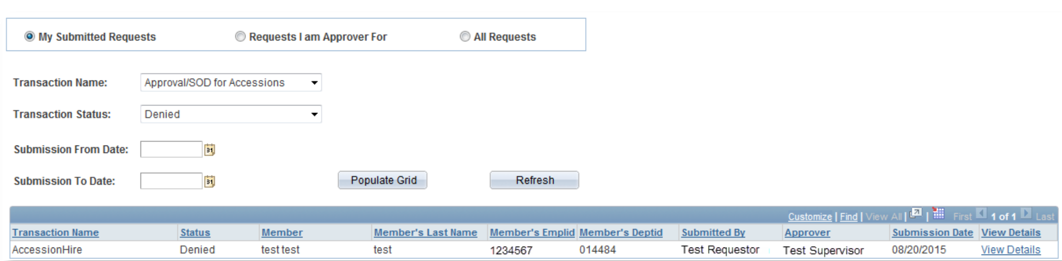
7

The requestor can view the items that need to be corrected by clicking on the **Requests** tab and selecting the **View My Requests (all types)** link in the Self Service Requests pagelet.

On the View My Action Requests page, select:

- **My Submitted Requests** = yes
- **Transaction Name** = Approval/SOD for Accessions
- **Transaction Status** = Denied

Click the **Populate Grid** button. Your denied request will be listed. Click the **View Details** link.



The data that must be corrected will be listed in the **Accessions Hire Approval** section.

<table>
<tr>
<td></td>
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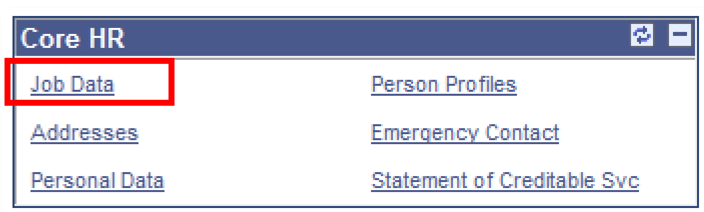
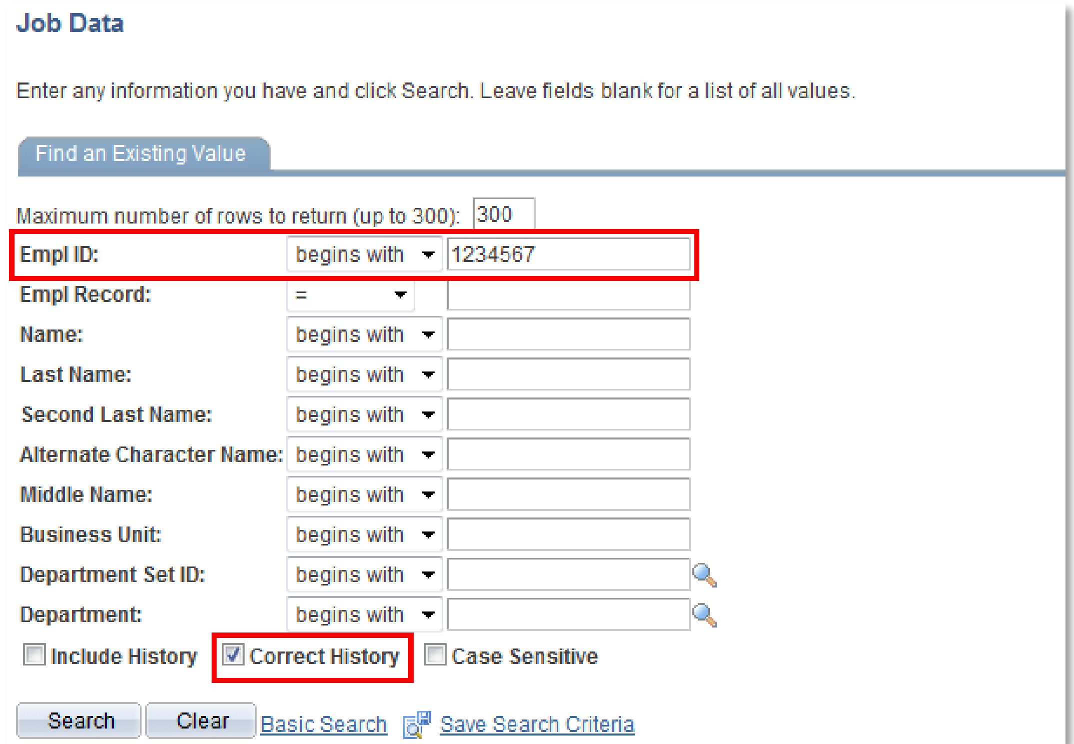
</td>
</tr>
<tr>
<td>8</td>
<td>
To correct job data such as employee class, service dates, job code, etc., the requestor must navigate to Job Data by clicking the Job Data link in the Core HR pagelet.


</td>
</tr>
<tr>
<td>9</td>
<td>On the search page, enter the member’s employee ID in the EmplID field, click the Correct History checkbox and click Search.</td>
</tr>
</table>



Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

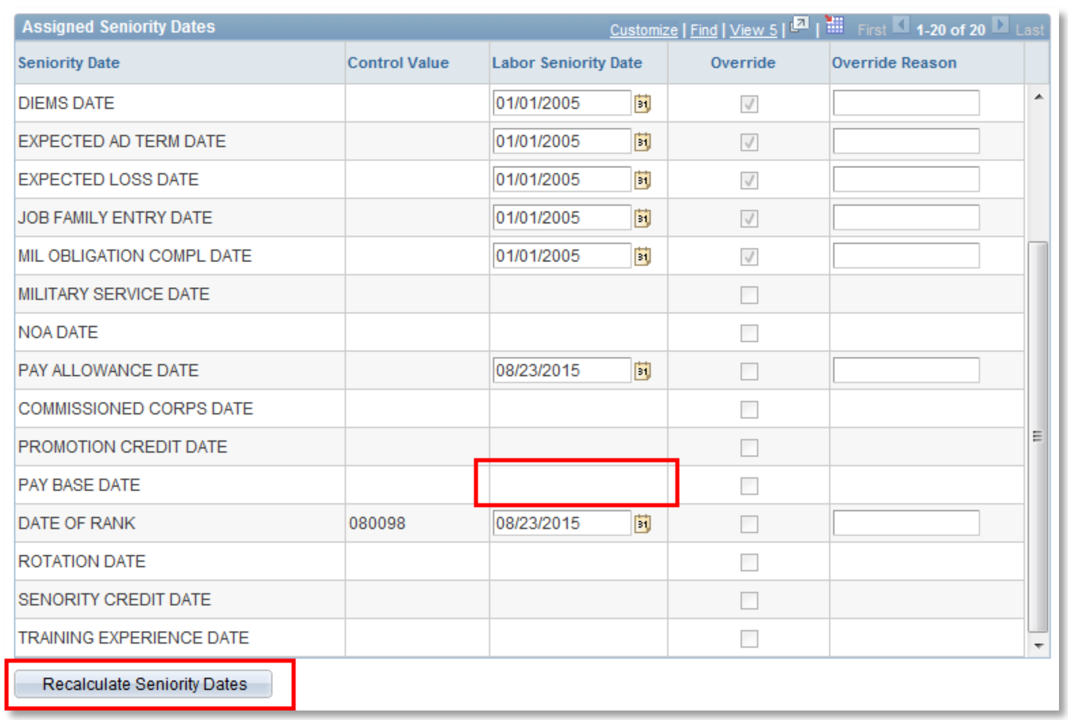
Maximum number of rows to return (up to 300): 300

Field	Operator	Value
Empl ID:	begins with	1234567
Empl Record:	=	
Name:	begins with	
Last Name:	begins with	
Second Last Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	
Business Unit:	begins with	
Department Set ID:	begins with	
Department:	begins with	

☐ Include History ☑ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

10 Correct the data that caused the approval to fail.

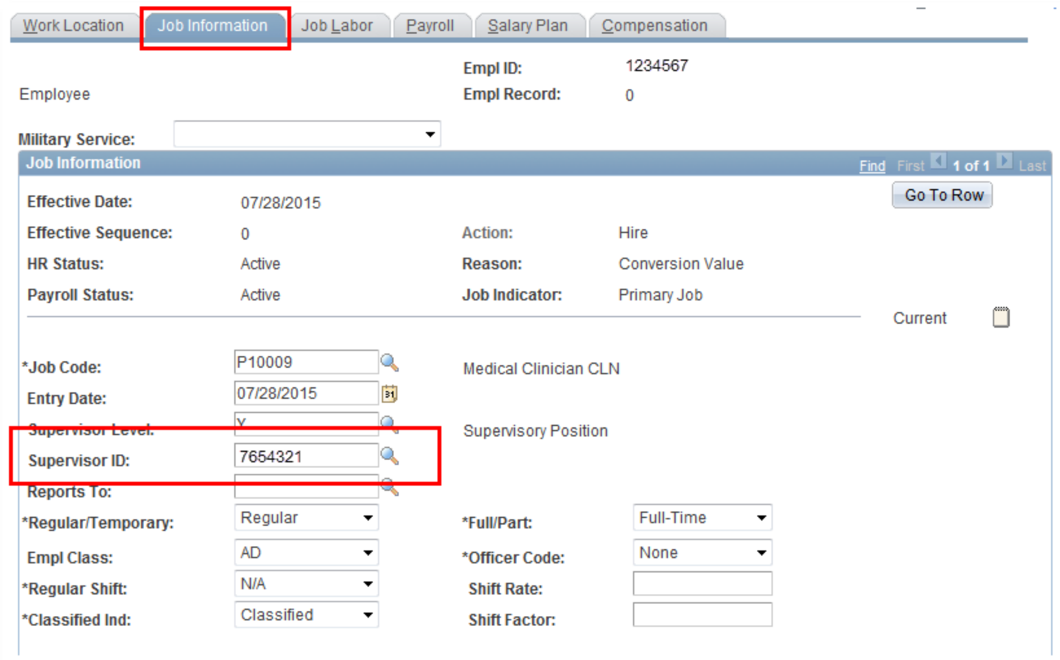


Assigned Seniority Dates Customize | Find | View 5 | First 1-20 of 20 Last

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
DIEMS DATE		01/01/2005	☑	
EXPECTED AD TERM DATE		01/01/2005	☑	
EXPECTED LOSS DATE		01/01/2005	☑	
JOB FAMILY ENTRY DATE		01/01/2005	☑	
MIL OBLIGATION COMPL DATE		01/01/2005	☑	
MILITARY SERVICE DATE			☐	
NOA DATE			☐	
PAY ALLOWANCE DATE		08/23/2015	☐	
COMMISSIONED CORPS DATE			☐	
PROMOTION CREDIT DATE			☐	
PAY BASE DATE			☐	
DATE OF RANK	080098	08/23/2015	☐	
ROTATION DATE			☐	
SENORITY CREDIT DATE			☐	
TRAINING EXPERIENCE DATE			☐	

Recalculate Seniority Dates

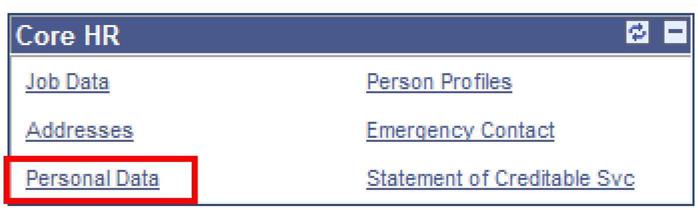
11 ! After the data has been corrected, indicate the approver again in the Supervisor ID field on the Job Information page.



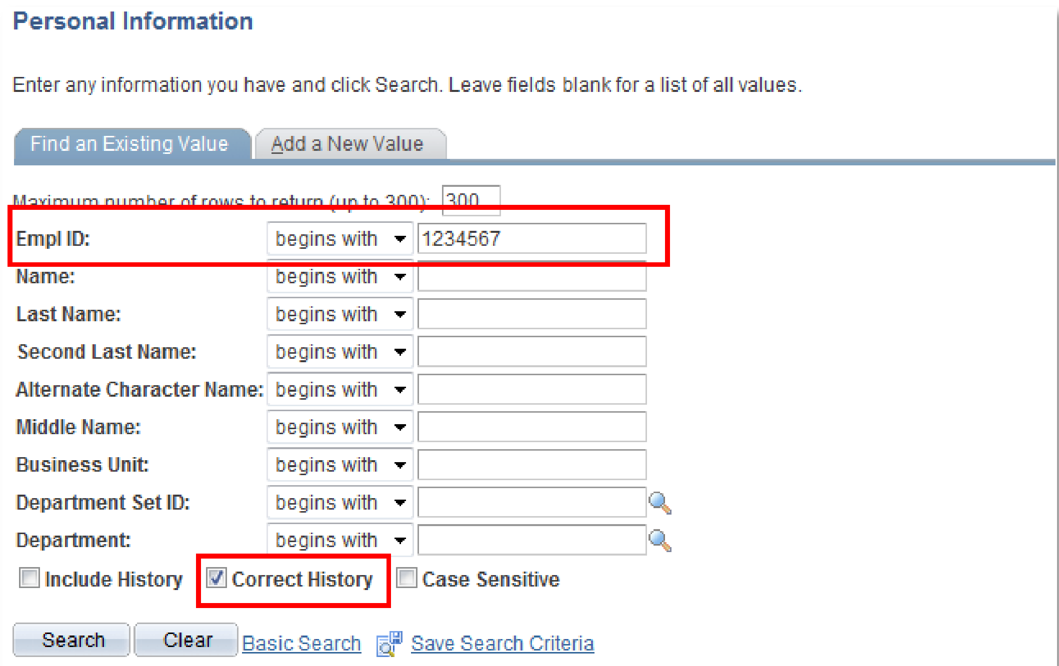
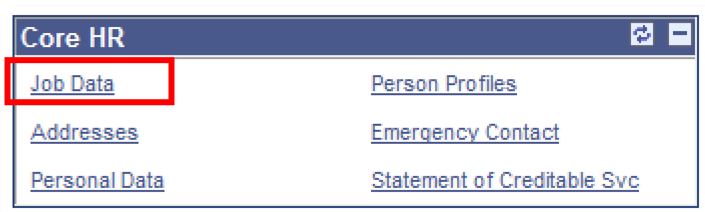
12 Click the **Save** button. Upon save, the request will be re-routed to the approver.

Personal Data Corrections

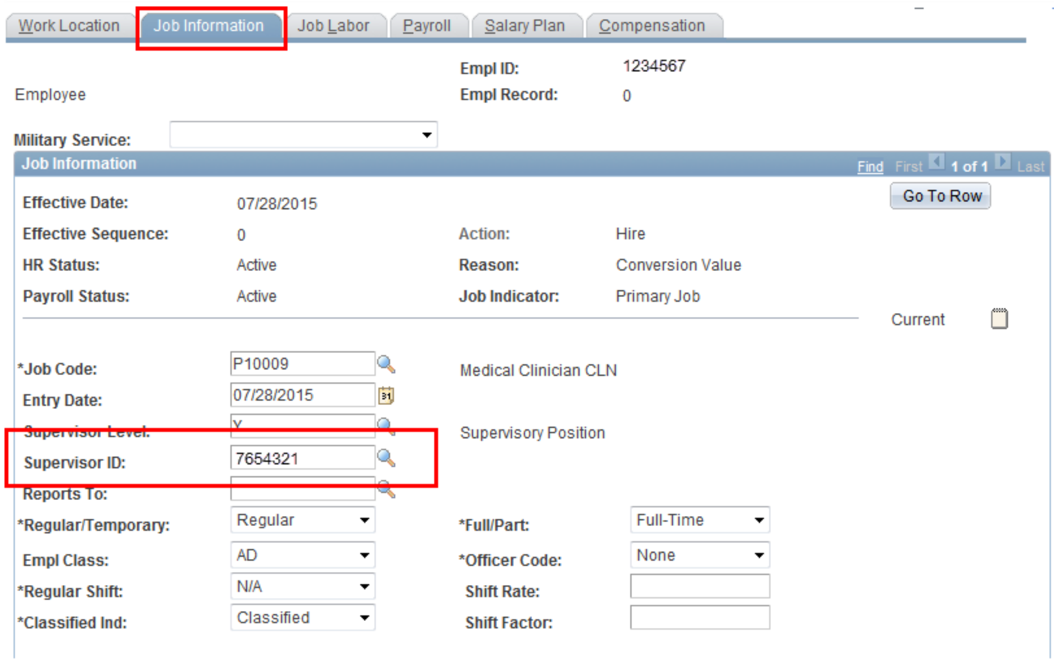
13 To correct personal data such as business address, the **requestor** must navigate Personal Data by clicking the Personal Data link in the Core HR pagelet.



14 On the search page, enter the member's employee ID in the **EmplID** field, click the **Correct History** checkbox and click **Search**.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>15</td><td>Correct the data that caused the approval to fail and click the Save button.</td></tr>
<tr><td>16</td><td>Navigate to Job Data by clicking the Job Data link in the Core HR pagelet.


! Indicate the approver again in the Supervisor ID field on the Job Information page.</td></tr>
</table>

	
17	Click the **Save** button. Upon save, the request will be re-routed to the approver.