NEOGOV Personnel Actions

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Table of Contents

Preface

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Overview

Update employee information in NEOGOV HRIS. The following are typical examples:

- Address change
- Promotion or transfer to a new position
- Wage increase
- Direct deposit account change
- New emergency contact

Update this information using personnel actions (PAs) or by entering the information on the relevant page.

Process	Result
With PAs	NEOGOV creates a **Pending** task for a defined approver. After approval and processing, NEOGOV updates the employee's information. Updates are not immediate.
Without PAs	Updates are immediate upon entering and saving.

Use PAs to add a level of approval. For example, you may want to use a PA for wage increases to require approval, but you might not need approvals when an employee adds an emergency contact.

Process Flow

The following diagram captures the end-to-end **PA** cycle. This document's Initiation, Viewing, Approval, and Processing sections follow the sequential framework in the diagram below, with additional details and examples for each step.
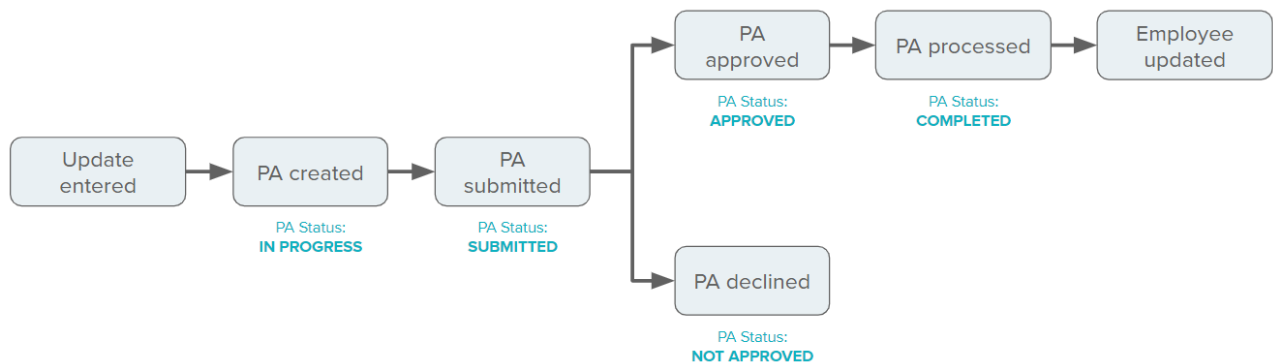
Initiation

Entry on Relevant Employee Page

To see the end-to-end PA process, consider the following example. On **Maintain Assignments (IEASL)** an employee currently has a **Wage Rate** of $39,500.

The HR administrator changes the **Wage Rate** to $50,000 . NEOGOV enables the **Save** button and highlights the new value with blue text.

After clicking **Save**, a pop-up appears to enter the **Effective as Of** date (the date the change begins) and a **Change Reason** for audit or reporting.

Date Sensitive Change

If this change is to take effect on a specific date, enter the Date and Reason then click 'OK'.

* Effective as of : 12/01/2022

Change Reason   WAGE INCREASE

If this is a correction only, leave the date and reason as is and click 'OK'

If you have made an error, click 'CANCEL'

OK   Cancel

After clicking **OK**, NEOGOV highlights the new rate of $50,000 in burnt orange text.
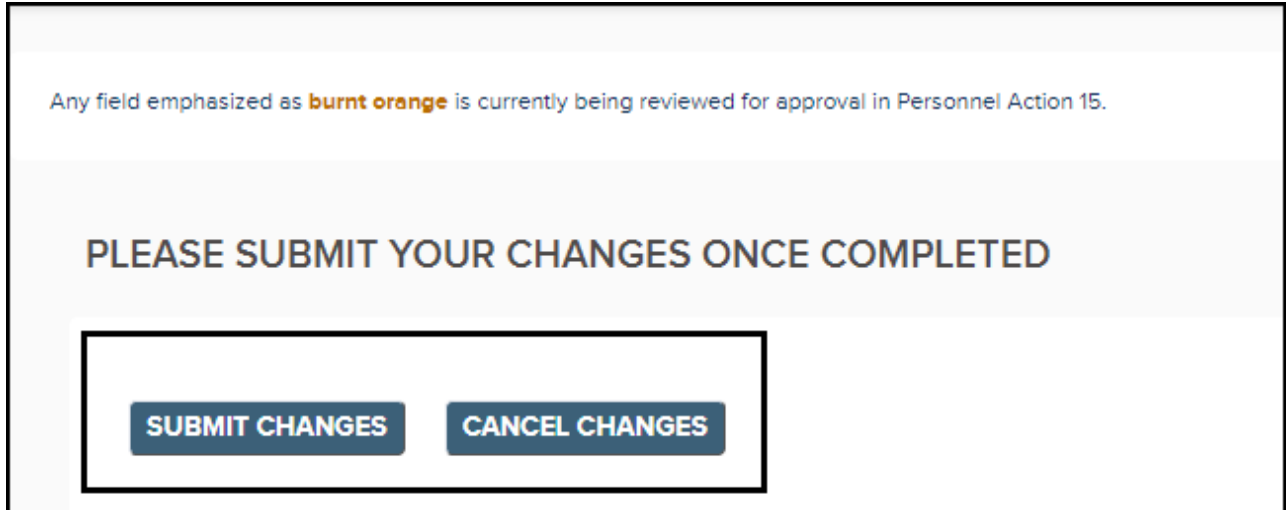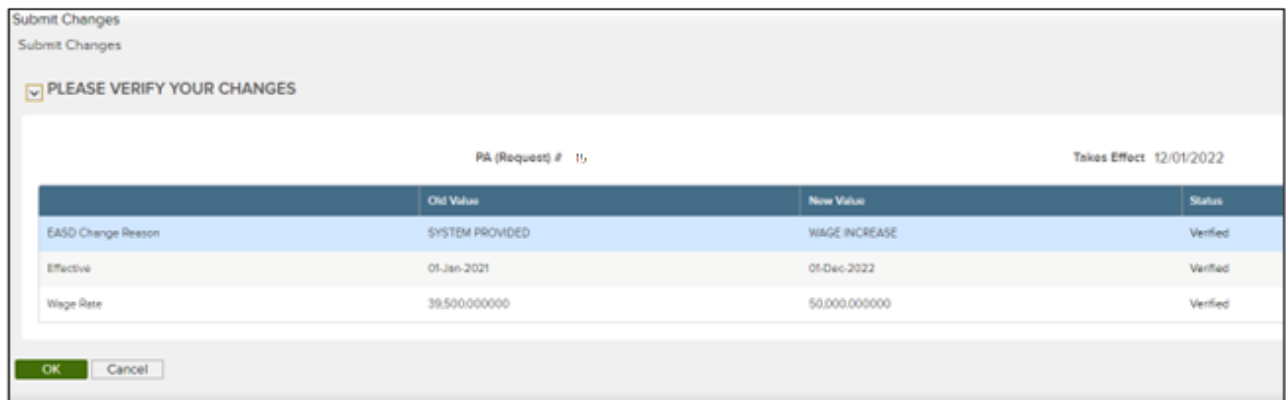
Range

Scale / Step

Wage Rate $ 50,000.00

Basis   YR

Submission

NEOGOV displays a new section at the top of the screen, indicating a unique PA number for this update (**15** in this example) and buttons to **SUBMIT CHANGES** or **CANCEL CHANGES**

Any field emphasized as **burnt orange** is currently being reviewed for approval in Personnel Action 15.

PLEASE SUBMIT YOUR CHANGES ONCE COMPLETED

SUBMIT CHANGES   CANCEL CHANGES

Clicking **CANCEL CHANGES** reverts the changes. Clicking **SUBMIT CHANGES** displays a pop-up with the **Old Value** and **New Value** confirming the changes.
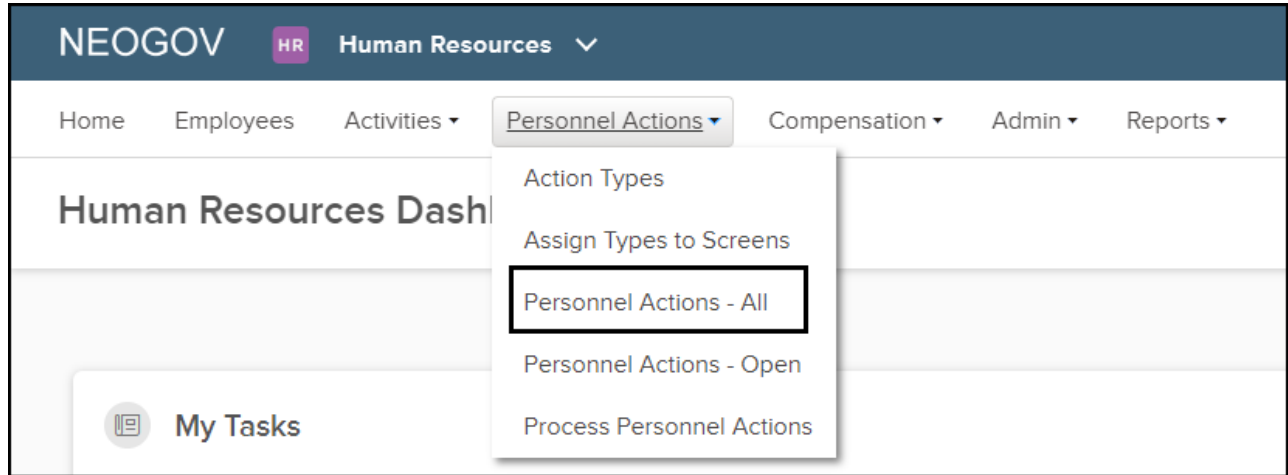
Submit Changes
Submit Changes

☑ PLEASE VERIFY YOUR CHANGES

PA (Request) # 15   Takes Effect 12/01/2022

	Old Value	New Value	Status
EASD Change Reason	SYSTEM PROVIDED	WAGE INCREASE	Verified
Effective	01-Jan-2021	01-Dec-2022	Verified
Wage Rate	39.500000000	50.000000000	Verified

OK   Cancel

Based on the approval flow defined for this type of action (in this example, an assignment update), after clicking **OK**, the new **Wage Rate** $50,000.00 requires approval and is **Pending**.

Viewing

All Personnel Actions

HR administrators can use the **Personnel Actions (ISPA)** screen from the **Personnel Actions** menu to view open and historical PA details, monitor progress, and perform actions.

After selecting the employee from the **LIST OF EMPLOYEES**, NEOGOV displays the **PA** (**#15** for our example).

The **PA Changes** tab in the **PERSONNEL ACTIONS** section shows updated details. For this example, NEOGOV updates the **Old Value** of $39,500 to the **New Value** of $50,000.

Column	Details	Old Value	New Value
Tax Jurisdiction/Geo Code		Stonyford, CA, USA	Stonyford, CA, USA
This is my field			
Time Reviewer			
Title		Emergency Medical Technician - BI	Emergency Medical Technician - BI
Trigger Retro Pay		No	No
Unit		NON_UNION	NON_UNION
Wage Rate		39,500.000000	50,000.000000

Field Descriptions

The following table lists critical fields and descriptions on the **Personnel Actions** page.
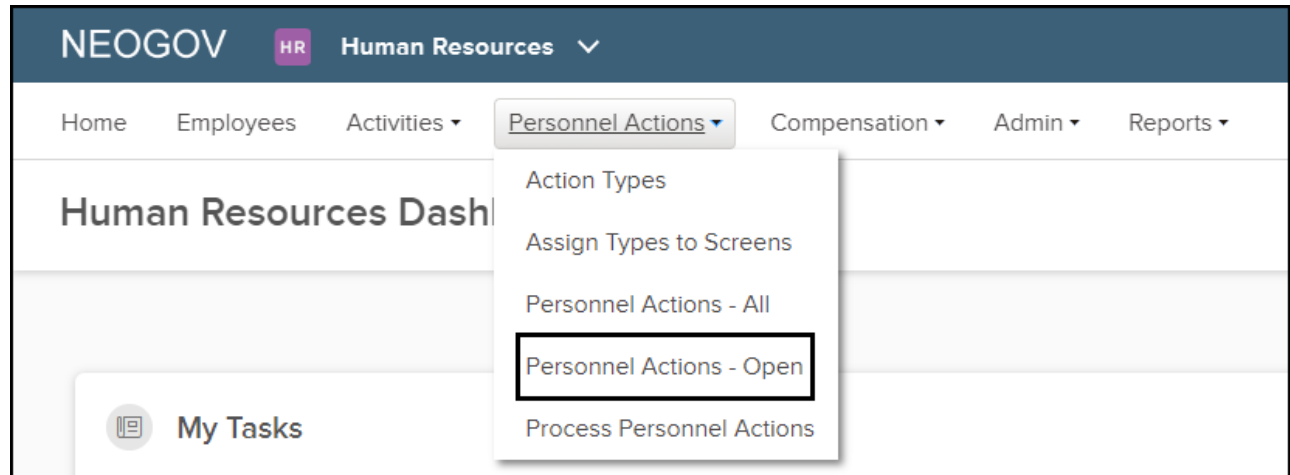
Field	Description
Status	The status of the **PA** in the process. Currently **Submitted** in this example.
Takes Effect	The effective date of the changes to the PAs. For this example, 12/01/22, as that is the effective date entered.
PA Description	The type of PA. NEOGOV automatically uses the default value based on the PA setup.
Change Reason	The reason for the change. This example uses **WAGE INCREASE** because that was the reason entered.
Update Future Records	What should happen if there are any future effective dated records for the employee *after* the PA effective date? ● Toggle (ON): Update the future records too. ● Toggle (OFF): Do not also update future records.
Cascade Change Reason	Should you update the change reason on those future records to match the reason for any future records impacted by this PA? ● Toggle (ON): Override any existing change reason on all future records to match the one for this PA. ● Toggle (OFF): Do not override the future change reasons.

Open Personnel Actions

The **Open Personnel Actions (ISPA_NGV)** screen from the **Personnel Actions** menu provides a pre-filtered view of PAs in an **Open** (incomplete) status.

	This screen may help you analyze open PAs without additional historical records to filter.

The **PA DETAILS** table provides all the open PAs for filtering and sorting.

Name	PA #	Status	PA Type	Initiated By	Create Date	Takes Effect	Change Reason
Irv Rosenberg	195	In Progress	PROFILE CHANGE	User, Super	08-Dec-2021 03:47 PM	08-Dec-2021	PERSONAL CHANGE
Jay B Walkin	224	In Progress	PROFILE CHANGE	User, Super	15-Feb-2022 08:19 AM	15-Feb-2022	PERSONAL CHANGE
Dyan Carandang	277	In Progress	PROFILE CHANGE	SysAdminID_260	07-Jun-2022 05:41 PM	07-Jun-2022	PERSONAL CHANGE
Bill Doran	451	In Progress	PROFILE CHANGE	aprice	03-Nov-2022 02:47 PM	03-Nov-2022	PERSONAL CHANGE
Craig Reynolds	461	Submitted	ASSIGNMENT CHANGE	aprice	07-Dec-2022 04:58 PM	01-Dec-2022	WAGE INCREASE
Glenn Davis	437	Submitted	PROFILE2	Davis, Glenn	18-Oct-2022 06:47 AM	18-Oct-2022	
Krisia Valenzuela	462	In Progress	ASSIGNMENT CHANGE	aprice	07-Dec-2022 05:14 PM	01-Jan-2021	SYSTEM PROVIDED
Alan Ashby	303	Submitted	TAX AREAS	Ashby, Alan	22-Jul-2022 12:00 PM	22-Jul-2022	
Alan Ashby	302	In Progress	DIRECT DEPOSIT	Ashby, Alan	22-Jul-2022 11:54 AM	22-Jul-2022	BANK ACCOUNT CHG
Maria Sandjaja	301	In Progress	ASSIGNMENT CHANGE	SysAdminID_383	22-Jul-2022 09:37 AM	01-Apr-2022	INITIAL RECORD

Administrator Actions

When you select an employee, NEOGOV displays a list of action buttons on the **Open Personnel Actions (ISPA_NGV)** and **Personnel Actions (ISPA)** screens. The following table describes each action.


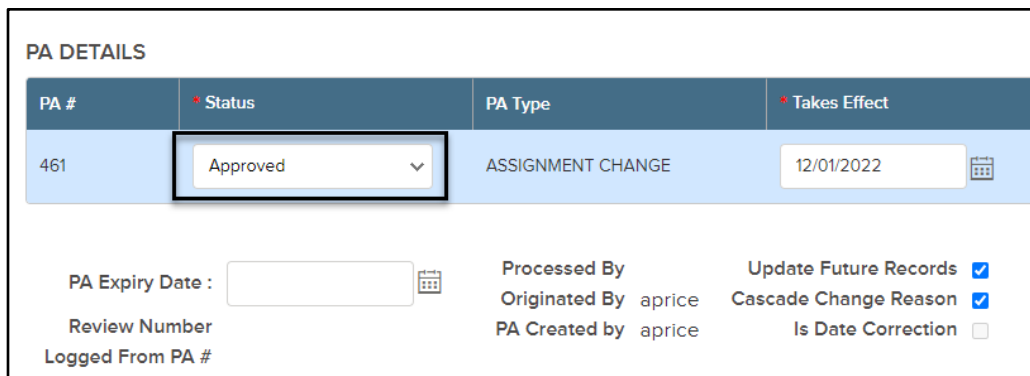| Action	Description
Cancel PA	- When enabled: PA status is **In Progress**, **Submitted**, or **Approved**. - What it does: Places PA in **Cancelled** status. - Why use it: Cancels PAs that you entered or started in error.
Submit PA	- When enabled: PA status is In **Progress**. - What it does: Places PA in **Submitted** status. - Why use it: When the PA is ready for submission, NEOGOV will trigger the approval process.
Add a Request	- When enabled: PA status is **In Progress** or **Approved**. - What it does: Provide a pop-up to enter a comment for this PA. - Why use it: When a comment is helpful for future reference.
Process PA	- When enabled: PA is in **Approved** status. - What it does: Places PA in **Completed** status and updates employee information. - Why use it: PA is in **Approved** status, but not yet processed, and you want to process the PA individually.

Approval

Submitting the PA creates an approval task based on a predefined approval workflow for the PA type.

The task appears on the approver's **Human Resources Dashboard** as a link to view, approve, or decline.
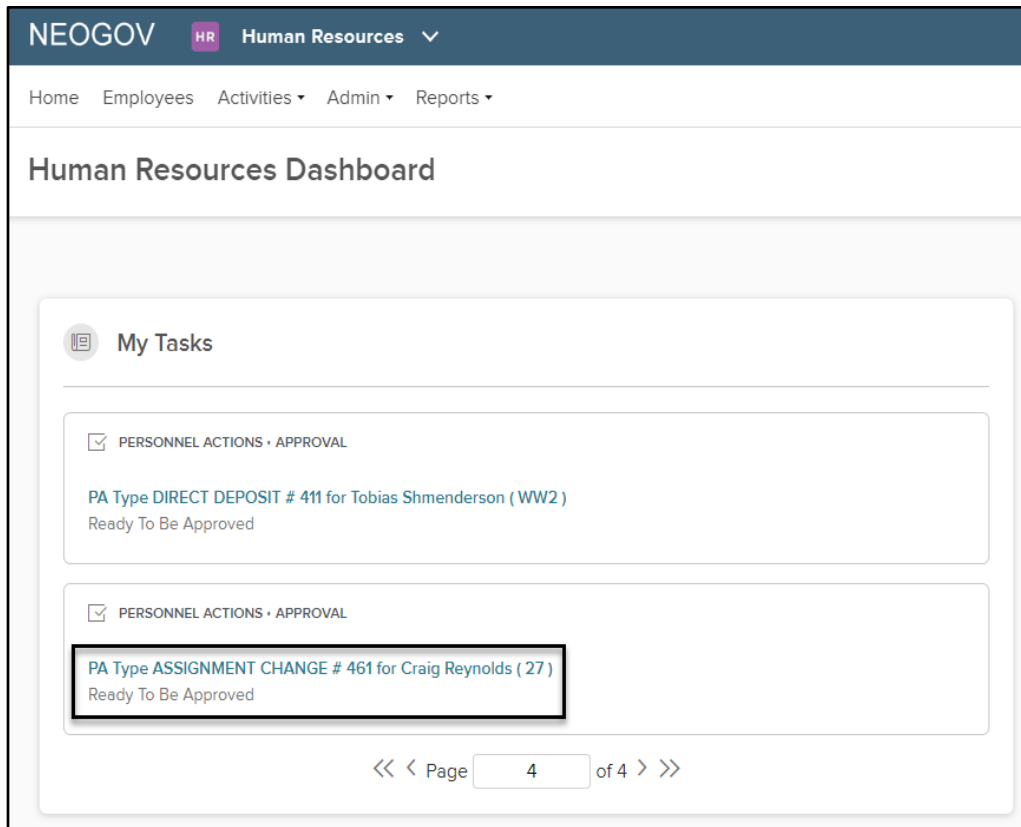
After clicking **OK**, NEOGOV displays the **Approved** status.

Processing

Once you've approved the PA, you can process it. NEOGOV updates the PA to **Completed** and updates the employee's data.
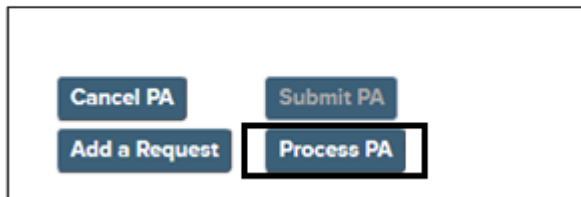
You can process PAs manually or by using the mass update function described below.

Manual Update

Manually updating individual PAs may be helpful on an exception basis.

To update a single PA, do the following.

1. Select the desired PA on the **Personnel Actions (ISPA)** and **Open Personnel Actions (ISPA_NGV)** screens.
2. Click **Process PA**.

Mass Update

You can process multiple PAs using the **Update Personnel Actions (USPPA)** screen from the **Process Personnel Actions** menu option.

> Mass update processing is the most efficient option. You may schedule the process to run automatically overnight (or at other frequencies), removing the need for manual steps.
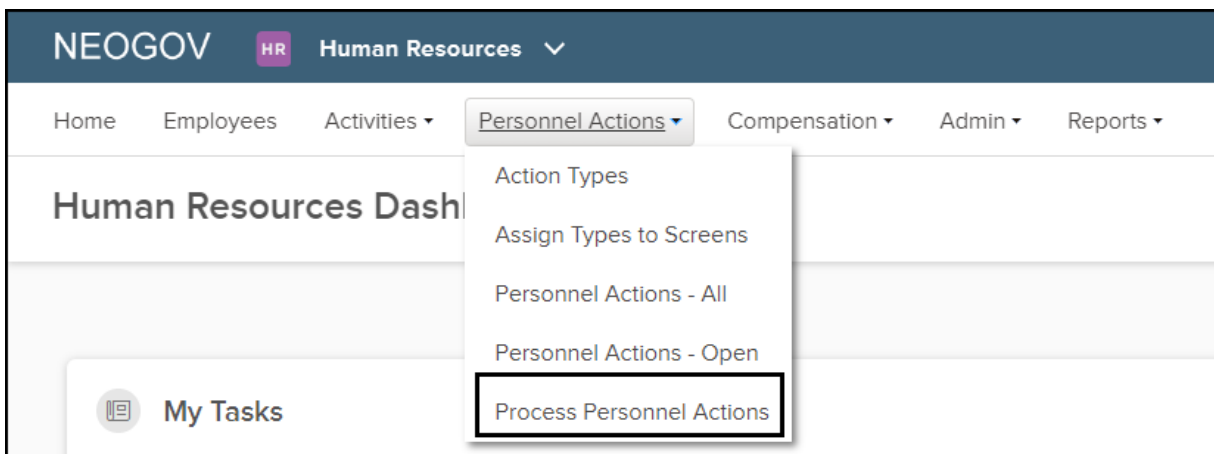
1. In the **PARAMETERS** section, enter your desired field settings.

2. In the lower section, enter the desired filters to control whom NEOGOV includes in the processing.

> For example, you may run it just for a specific person or employees in a specific department. You can also opt to run it for a specific **PA Type**, such as assignment changes.

3. Click **Generate**.

Field Descriptions

The following table describes the fields.

Field	Description
From Date - To Date	Enter the date range based on the processing effective date. Enter a specific date or select a dynamic date such as **Beginning of Day** or **Beginning of Week**.
Trial	**Yes:** Output mode is in preview, shows all PAs ready for processing, and helps you test the results. **No**: Processes the PAs and updates employee data.
Exception Level	Select **0-Exceptions only** to optimize report processing time.
User Comment	Leave blank.

Processing Results

After processing, the PA status displays as **Completed** .

NEOGOV updates the employee record with the PA's change and removes the **Pending** status.

Reporting

Generate a Personnel Action Report

Administrators can use the **Personnel Actions Report (RSPA)** page to review PA requests.

1. From the **Human Resources Dashboard**, click **Reports** > **Employee Reports** > **Personnel Action s**, or enter **RSPA** in the **Page Code** field.

2. Under the **Criteria** tab, select the following **EFFECTIVE DATE** parameters.

Field	Description
From Date	● Select the date that NEOGOV begins including PAs in the report. ● (Optional) Select a specific period, such as **Beginning of Day**.
To Date	● Select the date that NEOGOV stops including PAs in the report. ● (Optional) Select a specific period, such as **Beginning of Day**.
Sort People By	Select how NEOGOV sorts the information I the report. The default value is **Person Code**.
Print PA Changes	● **Yes** – NEOGOV prints PA changes in the report. ● **No** – NEOGOV does not include PA changes in the report.
User Comment	(Optional) Enter any desired comments. NEOGOV displays the comments in the header of all pages in the report.

3. Select the following **PROCESSED DATE** parameters.

Field	Description
From Date	● Select the date that NEOGOV begins including processed PAs in the report. ● (Optional) Select a specific period, such as **Beginning of Day**.
To Date	● Select the date that NEOGOV stops including processed PAs in the report. ● (Optional) Select a specific period, such as **Beginning of Day**.

REPORT PARAMETERS

EFFECTIVE DATE

From Date : 07/13/2021

To Date : 07/11/2022

Sort People By   Person Code ∨

Print PA Changes   Yes ∨

User comment

PROCESSED DATE

From Date : 07/13/2021

To Date : 07/11/2022

4. Select any optional **REPORT FILTERS**, then click **Generate**.

Field	Description
People List Code	(Optional) Select the desired people list to narrow the report.
Person	(Optional) Select the name of the employee(s) to narrow the report.
Entity	(optional) Select the name of the organization.
Department	(Optional) Select the desired department to narrow the report.
Org Level Type	(Optional) Select the location association the org level has with the organization. For example, **EEO Headquarter** or **EEO Locn Establishment**.
Org Level	(Optional) Select the desired org level to narrow the report.
Unit	(Optional) Select the desired unit to narrow the report.
Group	(Optional) Select the desired group to narrow the report.
Authorization	(Optional) Select the specific approval authorization to narrow the employees in the report.

Field	Description
Location	(Optional) Select the desired location to narrow the report.
Payroll	(Optional) Select the desired payrolls to narrow the report.
PA Number	(Optional) Select the desired PA to process.
PA Type	(Optional) Select the desired PA type to process.
PA Status	(Optional) Select the desired PA status to narrow the report.

REPORT FILTERS

People List Code		Location	
Person		Payroll	
Entity	RUNWATERS	PA Number	
Department		PA Type	
Org Level Type	EEO Headqu ⌄	PA Status	In Progress
Org Level			
Unit			
Group			
Authorization			

▶ Generate   ↩ Reset   ⊗ Cancel

Appendix

Version	Description	Date
2	● Added Appendix section. ● Updated screenshots.	2/27/23
1	Initial release.	1/18/23