

PERSONNEL ACTION FORMS

Any information and updates regarding an individual's employment with the County must be submitted via a Personnel Action (PA) form. The PA form is utilized to document all actions affecting the status of employment such as appointment, compensation, promotion, transfer, termination, layoff, and dismissal. This includes demographic changes regarding an employee such as name changes.

Changing the number of hours an employee works a week could also have an impact to benefit levels. This applies to both regular and unallocated (temporary) employees.

If a regular employee is working temporary out-of-class (TOC) or is assigned to a limited term position, these actions must be noted on a Personnel Action form. There is also a place to indicate the duration of such actions. It is important for tracking purposes that the estimated duration of a change in hours, temporary out-of-class (TOC) position, leave of absence, and limited term assignment are noted on the Personnel Action form.

Supporting documentation is required for many transactions. On most of the Personnel Actions forms there is a "Comments" field that can be used for this purpose. Attachment of e-mails or other supporting documents is acceptable.

By routing all Personnel Action forms through the Employee Services - Human Resources Division, all information relative to classification, benefits, and pay will be reviewed, and any inconsistencies or inaccuracies will be resolved and corrected prior to the action being processed. In addition, no paychecks can be issued for personnel services prior to Personnel Action form approval by the Employee Services - Human Resources Division.

Departments will receive an electronic copy of the Personnel Action form after it has been processed. Each department should ensure that a copy of the processed Personnel Action form is given to the employee.

Common Personnel Action Transactions

- New hire
- Rehire
- Promotions
- Temporary employee status changes
- Temporary to Regular Status
- Regular Status to Temporary Status
- Termination and retirement
- Temporary Out of Class (TOC) and Also Works As (AWA)

- Supervisor/location/work schedule changes
- Leaves of Absence
- Name changes
- Change in standard hours (FTE) and status

Transactions initiated by a DES generated form

- Reclassifications
- Scheduled Salary Increases – returned by departments
- End of Probation– returned by departments
- Automatic Salary Increases
- Temporary Out Of Class Extension Date

Transactions completed by DES

- Cost of Living Increases
- Family Medical Leave Events

This is not an exhaustive list of all possible employee transactions.

Personnel Action Forms

- Appointment/Personal Data/Status Changes
- Leave of Absence
- Temporary Employees
- Temporary Out of Class
- Terminations

All forms are found on the Department of Employee Services (DES) intranet page. They are available as WORD templates so they can be individualized by each department for reoccurring values such as department I.D. All PA forms have required information and serve different transaction areas. A Personnel Action Guide is available on the DES intranet page to help PA processors complete the forms.

Employee Self Service

Employee Self Service (ESS) is a web-based application that provides employees with a single online location to view, and in some instances, modify personal, payroll and compensation, benefits and training information.

All employees have access to Employee Self Service (ESS) and can update their own personal information along with other select services. Name changes require a Personnel Action form.

- Address
- Phone Numbers
- Email Addresses
- Emergency Contacts
- Benefit summaries and enrollment

- Update W-4 Tax Information (Federal Only)
- View W-2 Forms
- Direct Deposit
- Sign up for DES sponsored training

Effective Dates of Transactions

DES and Finance has worked with the County Administrator regarding Personnel Action Forms and the effective date for the following types of employee transactions:

- Reclassifications (except where specific dates are determined by bargaining language)
- Promotions
- Demotions
- Transfers
- Supervisor Changes
- Department/Location Changes
- Schedule Changes
- Cost Distribution/Account Number Changes
- Temporary Status to Regular Status
- Regular Status to Temporary Status

The Effective Date for the above transactions will be the 1st day of a **pay period**. Refer to the Payroll Cutoff and Holiday document for pay period beginning dates. You can find this document on the Employee Services intranet page under Personnel Documents or on the Finance page under Payroll.

The consistent use of the 1st day of a pay period date creates efficiency and improved processing through the PeopleSoft HR system to the Workforce Software Time and Labor system (WFS).

PA's with an effective date other than the 1st day of a pay period for the transactions listed above will be returned to the department.

Need more Information

Contact the HRIS Unit - Department of Employee Services (DES) with questions regarding the need and completion of PA forms.

RESOURCES AND INTERNET LINKS

Department of Employee Services -

http://web1.clackamas.us/mydepartment/3004.jsp?q_dept=DES

County Ordinance

<http://www.clackamas.us/code/documents/title2.pdf>

Employment Policy and Practice - <http://www.clackamas.us/des/epp.html>

EPP 7	Military Leave
EPP 10	Family and Medical Leave
EPP 11	Leaves of Absence
EPP 31	Employment of Temporary and Limited Term Employees
EPP 32	Part-time, Temporary, and Limited Term Employees - Benefits and Service Accruals
EPP 33	Employee Benefits

Intranet Resources:

My Department tab/Employee Services:

- Personnel Action forms and guide
- Pay Plan - <http://www.clackamas.us/des/payplan.html>
- Labor/Union Contracts - <http://www.clackamas.us/des/contracts.html>
- Payroll Cutoffs & Holidays
- Resources for Hiring Supervisors

Employee Self Service (ESS) - <https://hrapp.clackamas.us/ess/signon.html>

➔ Online Tutorials -

http://web1.clackamas.us/mydepartment/3004.jsp?q_dept=EMPLOYEESELFERVICE

- Printable Job Aids located under Documents
- Interactive Training located under ESS Interactive Online Training