

## GUIDELINES FOR TRANSACTION EFFECTIVE DATES

**JOB DATA**

**PENSIONABLE EARNINGS**

**POSITION**

*May 1, 2001*

*All examples in this document are based upon a standard forty-hour work week, Monday through Friday schedule.*

### JOB DATA TRANSACTIONS

#### Entrance Dates

##### Hire or Rehire -

The effective date of a Hire or Rehire is the date the employee actually reports for duty.

Example: An employee reports to duty on Tuesday, September 4, 2001 (Monday, September 3, 2001 was observed as Labor Day Holiday). The *Effective Date* of the action is September 4, 2001. The employee is not eligible to be paid for the Holiday on September 3, 2001.

##### Change Employment Record Number –

The effective date must be the same as the effective date of the termination from the previous *Employment Record Number*. The effective date should ALWAYS be the first day of a pay period.

Example: An employee is to be changed from non-benefits (Employment Record 1) to benefits (Employment Record 0) status effective August 1, 2001. The effective date of the transaction terminating the employee from Employment Record 1 is August 1, 2001. The effective date of the Hire or Rehire transaction on Employment Record 0 is August 1, 2001.

##### Transfer from Another Company –

The effective date is generally the date the employee actually reports to work in the new company, but MUST be the same date as the termination from the losing company.

Example: An employee reports to work in a new company on Monday, October 22, 2001. The effective date of the action transferring the employee out of the old company is October 22, 2001. The effective date of the transaction receiving the employee in the new company is October 22, 2001.

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Example: An employee reports to work in a new company on Wednesday, July 25, 2001. The effective date of the action transferring the employee out of the old company is July 25, 2001. The effective date of the transaction receiving the employee in the new company is July 25, 2001.

Exception for First Day of Pay Period: An employee reports to work in a new company on Monday, June 18, 2001. The effective date of the action transferring the employee out of the old company is Saturday, June 16, 2001. The effective date of the receiving transaction in the new company is June 16, 2001.

### Return from Long Term Unpaid Leave Without Pay -

The effective date is the date the employee returns to pay status. NOTE: If the **calendar** day prior to the day the employee returns to duty is a paid holiday, the effective date of the action is the date of the holiday and the employee must be paid for the holiday.

Example: On Tuesday, September 4, 2001, an employee returns to duty following a long term unpaid leave of absence. Since Monday, September 3, 2001 was a paid holiday, the effective date of the transaction is September 3, 2001 and the employee is paid for the Labor Day holiday.

### Separation Dates

#### Termination Other Than Retirement -

The effective date is the first **calendar** day the employee is not in employment status. This determination applies to terminations for any reason *except* retirement (resignation, death, dismissal, reduction-in-force, etc.).

Example: An employee died at 3:05 a.m. on Thursday, April 19, 2001. The effective date of the transaction is April 20, 2001. (Manual calculation of pay will be required since the deceased is not eligible for pay for April 19, 2001.)

Example: An employee resigns effective August 31, 2001. The effective date of the transaction is September 1, 2001, which is the first day the employee is not in employment status.

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### Retirement –

The effective date is the first day of the month *after* the last day in pay status. This does NOT apply if the employee is not in pay status through the last working day of the month.

Example: An employee's last day at work (or last day in pay status) before retirement is Friday, June 29, 2001. The effective date of the retirement is July 1, 2001.

Example: An employee's last day in pay status before retirement is Friday, September 14, 2001. The effective date of the retirement is September 15, 2001.

### Long Term Unpaid Leave or Suspension Without Pay -

The effective date is the date the leave begins as authorized by the appointing authority.

Example: An employee submits a leave request effective the close of business Thursday, November 8, 2001 even though the employee has been on short term leave of absence since Friday, November 2, 2001. Assuming the appointing authority approves the request, the effective date is November 9, 2001.

Example: An employee's last day at work was Tuesday, April 3, 2001. The employee has submitted a request for long term leave without pay to be effective Friday, April 27, 2001 and requests the use of Georgia Compensatory Time for the intervening period. Assuming the appointing authority approves the request for both types of leave, the effective date of the long term leave is April 28, 2001.

### Transfer to Another Company:

The effective date is the first day the employee is in pay status in the new company.

Example: An employee reports to work in a new company on Wednesday, July 25, 2001. The effective date of the action transferring the employee out to the new company is July 25, 2001.

Example: An employee reports to work in a new company on Tuesday, May 29, 2001 (Monday, May 28, 2001 is observed as the Memorial Day Holiday). The effective date of the action transferring the employee out of the old company is May 28, 2001. The effective date of the action transferring the employee in to the new company is May 28, 2001.

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Exception for First Day of Pay Period: An employee reports to work in a new company on Monday, June 18, 2001. The effective date of the action transferring the employee out of the old company is Saturday, June 16, 2001. The effective date of the receiving transaction in the new company is Saturday, June 16, 2001.

### Short Term Leave or Suspension Without Pay -

Periods of short term leave of fifteen calendar days or less should be entered in Absence History, NOT as personnel transactions. This applies to both paid and unpaid absences.

Unless definitive information is available that the period of absence will exceed fifteen days, an absence should first be recorded in Absence History. If it is later determined that the absence will exceed fifteen days, the Absence History record may be deleted and the leave recorded in Job Data. Use of Absence History will **NOT** affect payroll. If compensation is to be docked, notification **MUST** be forwarded to Payroll for appropriate action.

### Other Actions

#### Promotion/Demotion –

The effective date may be any appropriate date as determined by the appointing authority. Recommended date is the first calendar day of any pay period.

NOTE: Any effective date other than the first calendar day of a pay period will result in the calculation of partial payment and will require manual intervention by payroll staff.

#### Salary Reduction/Restoration –

The effective date may be any appropriate date as determined by the appointing authority. Recommended date is the first calendar day of any pay period.

NOTE: Any effective date other than the first calendar day of a pay period will result in the calculation of partial payment and will require manual intervention by payroll staff.

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### PENSIONABLE EARNINGS TRANSACTIONS

Employees who are members of the Employees' Retirement System MUST have a transaction entered in the Pensionable Earnings Panel for every Job Data or Additional Pay transaction which includes a change of pension eligible salary. The effective date of any entry in the Pensionable Earnings Panel should be the same as the corresponding action(s) in Job Data or Additional Pay. If necessary to 'correct' a pensionable earnings record, the effective date of the correcting action must be the calendar day after the effective date of the original action. A different effective date is necessary due to the lack of a sequence number in pensionable earnings records.

Example: An employee was promoted with a five percent salary increase effective August 1, 2001. The appropriate Job Data and Pensionable Earnings transactions were entered. The work day after initial entry it was determined that the salary increase should have been ten percent. A Job Data action correcting the salary was entered with an effective date of August 1, 2001, *Effective Sequence 1*. A Pensionable Earnings record must be entered with an effective date of August 2, 2001.

### POSITION TRANSACTIONS

*Except in unusual circumstances, position actions should ALWAYS be effective the first calendar day of a pay period. For companies using Phoenix payroll, transactions effective any date other than the first calendar day of a pay period will result in partial payments being generated in the payroll module. Such payments require manual intervention by payroll staff. If necessary to 'correct' a position action, the effective date of a correcting action must be the calendar day after the effective date of the original action. A different effective date is necessary due to the lack of a sequence number in position data records.*

#### Creation of New Position –

The effective date may be any appropriate date as determined by the appointing authority, but may not be later than the date an employee is to be assigned to the position.

Example: A new employee is to be hired into a new position effective Monday, November 5, 2001. The effective date of the position action may be November 1, 2001, November 5, 2001, or any earlier date that may be necessary for budgetary reasons. Recommended date is November 1, 2001.

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Example: Upon creation of a position with an effective date of October 1, 2001, the *Department Number* was entered incorrectly. A second position action with the *Action Reason* CJ1 and the correct *Department Number* must be entered effective October 2, 2001. This 'correction' will NOT work properly if the position is to be filled effective October 1, 2001.

Recommendation: Create new positions with an effective date at least one pay period earlier than the date of anticipated incumbency. Doing so will permit the entry of any necessary 'correcting' transactions without impacting the Job Data records of the subsequent incumbent.

### Inactivate a Position –

A position may be inactivated using any effective date. The position MUST be vacated prior to the effective date of the inactivation. Inactivation of a position does not 'eliminate' the position. Using any subsequent effective date, the position may be reactivated for future use by the same company.

Example: An employee resigned effective September 1, 2001. The appointing authority determined that the position was no longer needed in the company. A row was inserted in position data making the position inactive effective September 9, 2001.

### Update/Reallocate Vacant Position –

The effective date may be any appropriate date as determined by the appointing authority.

Example: The FLSA status of a position is to be changed to nonexempt prior to the appointment of a new employee. The employee reported to duty Thursday, July 12, 2001. The effective date of the action may be July 1, 2001, or July 12, 2001. Recommended date is July 1, 2001.

Example: The Classified/Unclassified status of a position needs to be changed prior to appointing a new incumbent. The effective may be any date, however, the position action must be entered prior to entering the Job Data action.

An unclassified employee is being transferred to a previously classified position effective August 1, 2001. A position action changing the position to unclassified effective August 1, 2001 is entered on July 27, 2001. The Job Data action transferring the employee is entered July 30, 2001.

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### Update Filled Position -

The effective date is the date the action is to be effective as determined by the appointing authority.

Example: An employee is to be promoted October 16, 2001. The effective date of the action is October 16, 2001.

NOTE: An employee may be promoted, demoted, or experience a salary change any day of the month. For purposes of calculating pay, such actions taken on the first calendar day of a pay period will require no manual intervention by payroll staff.

Example: The *Drug Test Indicator* of a position is to be changed from 'None' to 'Agency Discretion'. The effective date of the action should be the first calendar day of an appropriate pay period.