



## Personnel Action Notice

Presentation Handout – December 2024

# Personnel Action Form

## Overview

Personnel Actions are used to initiate and process changes to an employee record, thus applying those changes to live data. Examples of personnel actions are new hires, salary/position/class changes, leave of absences, reinstatements, terminations, etc.

The Personnel Actions process allows you to distribute duties between different personnel and departments and provide detailed records of changes made. Personnel Actions also offers the convenience of being able to enter changes in advance and post them to the employee's records when the changes actually become effective or after appropriate review and approval.

Using Personnel Actions, you can start entering data weeks or months in advance without impacting actual employee records until the appropriate date.



## Description:

The Personnel Action Notice is to be filled out by the Manager for any action that will take place, such as:

- \* New Hire or Rehire
- \* Salary Change
- \* Transfer Status or Position Change
- \* Leave of Absence
- \* Separation of employment

\* All Requests for Personnel Action must be signed and dated by the department head responsible for authorizing payroll changes.

To: Karen Preval, Auditor  
 From: Karen A. Fisher, Sr. Assistant Solicitor  
 Date: September 21, 2022  
 Re: Timely Payment of Wages Following Separation from Employment

# IMPORTANT

*Please read*

On April 15, 2022, I sent an email communication highlighting a recent decision that was issued by the Massachusetts Supreme Judicial Court indicating the need to pay all accrued wages immediately on the date an employee is terminated or laid off in order to avoid facing liability in accordance with the state's Wage Act. See, *Reuter v. City of Methuen*, 489 Mass. 465 (2022). An issue recently arose where the timeliness of a vacation payment to an employee who previously resigned was questioned and the City faced potential litigation over the issue. This memo is being provided to further clarify when payment of wages is owed to separating employees, what constitutes "wages" under the Act and what may be done to minimize potential liability to the City.

### "Wages" Defined

The Act covers "wages earned" by employees through performance of the job. Though the term "wages" is not expressly defined by the Act, it has been construed to mean salary, including holiday and vacation pay, and certain commissions. Essentially, the Act has been held to apply to *all wages which can be definitely determined and are due and payable when an employee separates*, including contractual benefits that may exist under collective bargaining agreements and/or City Ordinances such as clerical incentives and sick leave buyouts. See also, e.g., *Plourde v. Police Dep't of Lawrence*, 85 Mass.App.Ct. 178 (2014) (paid leave earned by working overtime hours, denominated "compensatory time" by employer, held to constitute wages under the Wage Act); *Pacheco v. H.N. Gorin, Inc.*, 28 Mass. L. Rep. 311 (Mass.Super.2011) (Leibensperger, J.) (monies deducted from weekly paycheck and diverted to employer-coordinated retirement account constitute wages under the Wage Act).

### Employees Separated by Termination/Discharge or Lay Off

Employees who are discharged from employment **must be paid in full on the day the employee is discharged**. M.G.L. c. 149, §148. This date for purposes of the Wage Act will be the day that the employee's pay and benefits end, rather than the date the employee was told to stop working. It is imperative that, prior to effectively terminating an employee, the final paycheck be prepared and the date of termination match the issuance of the check.

### Employees Separated by Resignation/Quitting

Employees who quit or resign from employment **must be paid in full on the following regular pay day**. M.G.L. c. 149, §148. This means that if an employee is paid weekly every Thursday,

and they resign on a Monday, then all earned wages would be due and payable to the employee in a final paycheck that Thursday. In this scenario, payroll must be processed to ensure that all wages owed at the time of resignation are reflected in the paycheck that week. This has to be accomplished regardless of the typical payroll processes/deadlines for submission as failure to pay in the next regular payroll could subject the City to significant damages.

### Steps to Minimize Potential Liability

There are steps that can be taken to minimize the potential for liability to the City in these situations. Payroll processes should be looked at to determine whether there are potential points of failure that can be corrected to avoid delays in processing final paychecks for those separating from employment either voluntarily or involuntarily. Eliminating elongated approval processes when it comes to payroll is advisable. Also, consistently updating accruals for vacation/sick time/bonuses and any other compensation that would be included in a final paycheck would be helpful. Minimizing reliance on paper slips or employees submitting their own payroll can also be useful as these practices tend to slow down payroll processing. There should also be clear communication processes for resigning employees so that resignations are communicated in time to ensure all payments are made in the next regular pay check. Employees and their supervisors/Department Heads should know who to relay information regarding resignations to so final calculations can occur timely. (For example, if an employee advises supervisor that they will be resigning on X date, ask employee to put it in writing, share with department head, human resources, auditing, immediately, etc.)

Of course, I defer to the Auditor to determine the best means and methods of assessing and improving payroll practices in this regard. I also suggest that a policy be prepared for those processing payroll that addresses these specific situations and how they must be handled to ensure timely payments.

### Takeaways

The City must adhere to the strict time deadlines regarding the payment of wages to departing employees, otherwise, we will be **strictly liable for treble damages and attorney's fees** regardless of the reason(s) for any delay. This means that when a decision is made to terminate an employee, the City must be prepared to pay the employee in full on the date of termination. In situations where the City wants to take immediate disciplinary action (e.g., in the event of an employee's illegal activity or serious misconduct), but is unable to pay the employee their owed wages that day, we should postpone the effective date of termination until final pay can be issued and put the employee on administrative leave until such date. We must also ensure that employees who have elected to resign, even abruptly, are paid all their final wages on the next regular payday. In such a case, the *Reuter* court noted that the date of discharge for purposes of the Wage Act will be the day that the employee's pay and benefits end, rather than the date the employee was told to stop working.

If you have any questions regarding the information set forth herein, please feel free to contact the Law Department.

# Personnel Action

## Personnel Actions Initiated by Requester Time from Initiation to Completion

The purpose of the **Personnel Action Request (PAR)** process is to streamline the review and approval of hiring and personnel actions for appropriate classification, compensation, and funding requirements.



Each PAR must be approved by the appropriate Department Head and the signed PAR form should be submitted to HR Personnel Administration for review and approval.

All required documents should be submitted with the PAR form to expedite the review process.

Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process. Give ample time for routing of the PAR to H.R. and Payroll through all the approval channels and budget review.

Payroll Administration reviews and finalizes personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

**Your PAR is now completed.**

### **Approvals:**

- Department Clerk Head
- H.R.
- Payroll Clerk
- Department Head management responsible for authorizing payroll changes.

***Reminder! When you are out of the office. Please have an alternate added as second approver.***

# Personnel Action Backup Documents Required

## BACKUP REQUIRED FOR PAs

- **Step Increase** – Excel PA only
- **Address Change** – Excel PA and written change from employee
- **Military Leave** – Excel PA, Military Orders, and Military Pay Info (after 30 days paid differential)
- **No Pay Status** – Excel PA and employee calendar
- **Retirement** – Excel PA, Separation Costs, Retirement Letter from Employee, Attendance Calendar, Form 56 (if Police or Fire)
- **Resignation** – Excel PA, Separation Costs, Resignation Letter from Employee, Attendance Calendar, Form 56 (if Police or Fire)
- **Termination** – Excel PA, Separation Costs, Attendance Calendar, Form 56 for Police and Fire only (do not attach termination letter)
- **Suspension** – Excel PA, Civil Service Suspension Form (do not attach suspension letter), Civil Service Reinstatement Form upon return)
- **Promotion** – Excel PA, Promotion letter from DH, Interview letter, cover letter, resume, job posting, Civil Service Form 13 (Requisition) and Civil Service Form 15A (Provisional Promotion)   
 *DPW: don't do cover letters or resume*  
- If Promotion is Police or Fire Backup is Form 14, Form 16, and signed certification list
- **Demotion** – Excel PA, Demotion Letter from DH
- **New Hire** - Excel PA, Permanent Offer letter, Conditional Offer letter, Interview letter, cover letter, resume, job posting, Civil Service Form 13 (Requisition), and Civil Service Form 15 (New Hire)  
- If New Hire is Police Officer or Firefighter backup is Form 14, Form 16, and signed certification list
- **CDL License** – Excel PA, Copy of CDI License
- **Injured on Duty/Remove IOD** – PA only (do not attach IOD application)
- **Worker's Compensation (Add/Remove)** – Excel PA, Memo from Michelle Yaffe w/ effective date and amount
- **Police Shift Change** – Excel PA, Roll Call Order
- **Fire 40-42 or 42-40 Hours** – Excel PA only
- **Name Change** – Excel PA, Document for Proof of Name Change (Marriage Cert of Divorce NiSi)
- **Educational Incentive** – Excel PA, Transcript or Diploma Copy (Police and Fire Language says has to be official transcript)
- **EMT Certification (Fire)** – Excel PA, EMT Card/letter
- **Transfer** - Excel PA, Transfer letter from DH, Interview letter, cover letter, resume, job posting, Civil Service Form 13 (Requisition) and Civil Service Transfer Form
- **Settlement PAs** – Excel PA, Settlement Agreement (do not attach copy of Settlement Agreement if disciplinary)
- **DPW Provisional to Permanent (after 6 months)** – Excel PA, Civil Service Form 13, Civil Service Form 14, Civil Service Form 16, Certification Chart
- **Corona Virus Emergency Paid Sick Leave** – Excel PA, Approval Letter from HR

- When processing a Personnel Action Entry, to the left is a list of possible PA's that would be entered into the system to reflect changes made to an Employee's Records.
- In order for your PA to be processed and approved by each department, all documents must be attached in the PA which will then get added to the employees master records after final approval.
- Once complete, the changes would reflect on the employees master records, thus changing their pay, an address change, workers compensation, etc.

# BACKUP REQUIREMENT FOR PA'S

## Address Change

Excel PA and written request change from employee

## CDL License

Excel PA, Copy of CDL License

## Demotion

Excel PA, Demotion Letter from DH

## DPW Provisional to Permanent

Excel PA, Civil Service Form 13, 14, 16 and Certification Chart

## Education Incentive

Excel PA, Transcript or Diploma Copy (Police and Fire Language says has to be official transcript)

## EMT Certification

Excel PA, EMT Card Letter. Excel PA

## Fire 40-42 or 42-40 Hours

Excel PA only

## IOD Injured on Duty – Remove IOD

Excel PA only (do not attach IOD application)

# BACKUP REQUIREMENT FOR PA's

## Military Leave

Excel PA, Military Orders and Military Pay Stub

## Name Change

Excel PA, Document for Proof of Name Change (Marriage Certification or Divorce)

## New Hire

Excel PA, Permanent Offer letter, Conditional Offer Letter, Interview Letter, Cover Letter, Resume, Job posting, Civil Service Form 13 (Requisition, and Civil Service Form 15 (New Hire)

## No Pay Status

Excel PA and employee calendar

## Police Shift Change

Excel PA, Roll Call Order.

## Promotion

Excel PA, Promotion Letter from DH, Interview letter, cover letter, resume , job posting, Civil Services Form 13 (Requisition) and Civil service Form 15A (Provisional Promotion)

## Resignation

Excel PA, Separation Costs, Retirement Letter from Employee, Attendance Calendar, Attendance form 56 (if Police or Fire)

## Retirement

Excel PA, Separation Costs, Retirement Letter from Employee, Attendance Calendar, Attendance form 56 (if Police or Fire)



# BACKUP REQUIREMENT FOR PA'S

## Settlement PA's

Excel PA, Settlement Agreement (do not attach copy of Settlement Agreement if disciplinary)

## Step Increase

Excel PA only

## Suspension

Excel PA, Civil Service Suspension Form (do not attach suspension letter), Civil Service Reinstatement Form upon return

## Termination

Excel PA, Separation Costs, Attendance Calendar, Attendance form 56 for Police or Fire only (do not attach termination letter)

## Deceased

Excel PA (Estate Of), Separation Cost, Attendance calendar, form 56 (Police & Fire), M.G. L, c, 190B legal court appointed letter of authority for personal representative to the estate, (Letter of Authority from Personal Representative of the Estate &/or Letter of Authority from the Comm of MA Probate and Family Court

## Transfer

Excel PA, transfer letter from DH, Interview letter, Cover letter, Resume, Job posting, Civil Service Transfer Form.

## Worker's Compensation (Add/Remove):

Excel PA, Memo from worker's comp agent (Law Department) with effective date and amount.

# WARRANT – City Weekly Payroll schedule

Reminder, PA's should be submitted and completed two Friday's before the effective date of the Personnel Action

*Example: If you submit and have your PA completed by Friday 01/01/25 it will be reflected on the next payroll; 01/06/25 – 01/12/25*

To make the workflow processes smoother for all departments, it is necessary to submit the PA two weeks prior to the payroll you wish for it to fall on. (Some PA's are much longer in processing time compared to others so please be considerate of other departments when submitting your PA's.)



**THURSDAY**  
Due by 3pm

From Date	To Date	Check Date
December 23, 2024	December 29, 2024	January 2, 2025
December 30, 2024	January 5, 2025	January 9, 2025
January 6, 2025	January 12, 2025	January 16, 2025
January 13, 2025	January 19, 2025	January 23, 2025
January 20, 2025	January 26, 2025	January 30, 2025
January 27, 2025	February 2, 2025	February 6, 2025
February 3, 2025	February 9, 2025	February 13, 2025
February 10, 2025	February 16, 2025	February 20, 2025
February 17, 2025	February 23, 2025	February 27, 2025
February 24, 2025	March 2, 2025	March 6, 2025
March 3, 2025	March 9, 2025	March 13, 2025
March 10, 2025	March 16, 2025	March 20, 2025
March 17, 2025	March 23, 2025	March 27, 2025
March 24, 2025	March 30, 2025	April 3, 2025
March 31, 2025	April 6, 2025	April 10, 2025
April 7, 2025	April 13, 2025	April 17, 2025
April 14, 2025	April 20, 2025	April 24, 2025

From Date	To Date	Check Date
April 21, 2025	April 27, 2025	May 1, 2025
April 28, 2025	May 4, 2025	May 8, 2025
May 5, 2025	May 11, 2025	May 15, 2025
May 12, 2025	May 18, 2025	May 22, 2025
May 19, 2025	May 25, 2025	May 29, 2025
May 26, 2025	June 1, 2025	June 5, 2025
June 2, 2025	June 8, 2025	June 12, 2025
June 9, 2025	June 15, 2025	June 19, 2025
June 16, 2025	June 22, 2025	June 26, 2025
June 23, 2025	June 29, 2025	July 3, 2025
June 30, 2025	July 6, 2025	July 10, 2025
July 7, 2025	July 13, 2025	July 17, 2025
July 14, 2025	July 20, 2025	July 24, 2025
July 21, 2025	July 27, 2025	July 31, 2025
July 28, 2025	August 3, 2025	August 7, 2025
August 4, 2025	August 10, 2025	August 14, 2025
August 11, 2025	August 17, 2025	August 21, 2025

From Date	To Date	Check Date
August 18, 2025	August 24, 2025	August 28, 2025
August 25, 2025	August 31, 2025	September 4, 2025
September 1, 2025	September 7, 2025	September 11, 2025
September 8, 2025	September 14, 2025	September 18, 2025
September 15, 2025	September 21, 2025	September 25, 2025
September 22, 2025	September 28, 2025	October 2, 2025
September 29, 2025	October 5, 2025	October 9, 2025
October 6, 2025	October 12, 2025	October 16, 2025
October 13, 2025	October 19, 2025	October 23, 2025
October 20, 2025	October 26, 2025	October 30, 2025
October 27, 2025	November 2, 2025	November 6, 2025
November 3, 2025	November 9, 2025	November 13, 2025
November 10, 2025	November 16, 2025	November 20, 2025
November 17, 2025	November 23, 2025	November 27, 2025
November 24, 2025	November 30, 2025	December 4, 2025
December 1, 2025	December 7, 2025	December 11, 2025
December 8, 2025	December 14, 2025	December 18, 2025
December 15, 2025	December 21, 2025	December 25, 2025

# WARRANT – Bi-Weekly Payroll schedule

Reminder, PA's should be submitted and completed two Friday's before the effective date of the Personnel Action

*Example: If you submit and have your PA completed by Friday 01/02/25 it will be reflected on the next payroll; 01/12/2025 – 01/25/2025.*

To make the workflow processes smoother for all departments, it is necessary to submit the PA two weeks prior to the payroll you wish for it to fall on. (Some PA's are much longer in processing time compared to others so please be considerate of other departments when submitting your PA's.)



**TUESDAY**  
Due by 3pm

From Date	To Date	Check Date
December 29, 2024	January 11, 2025	January 10, 2025
January 12, 2025	January 25, 2025	January 24, 2025
January 26, 2025	February 8, 2025	February 7, 2025
February 9, 2025	February 22, 2025	February 21, 2025
February 23, 2025	March 8, 2025	March 7, 2025
March 9, 2025	March 22, 2025	March 21, 2025
March 23, 2025	April 5, 2025	April 4, 2025
April 6, 2025	April 19, 2025	April 18, 2025
April 20, 2025	May 3, 2025	May 2, 2025
May 4, 2025	May 17, 2025	May 16, 2025
May 18, 2025	May 31, 2025	May 30, 2025
June 1, 2025	June 14, 2025	June 13, 2025
June 15, 2025	June 28, 2025	June 27, 2025

From Date	To Date	Check Date
June 29, 2025	July 12, 2025	July 11, 2025
July 13, 2025	July 26, 2025	July 25, 2025
July 27, 2025	August 9, 2025	August 8, 2025
August 10, 2025	August 23, 2025	August 22, 2025
August 24, 2025	September 6, 2025	September 5, 2025
September 7, 2025	September 20, 2025	September 19, 2025
September 21, 2025	October 4, 2025	October 3, 2025
October 5, 2025	October 18, 2025	October 17, 2025
October 19, 2025	November 1, 2025	October 31, 2025
November 2, 2025	November 15, 2025	November 14, 2025
November 16, 2025	November 29, 2025	November 28, 2025
November 30, 2025	December 13, 2025	December 12, 2025
December 14, 2025	December 27, 2025	December 26, 2025

# Retrieve Personnel Action Form

Enterprise ERP Landing Page

City of Brockton - prod

Approvals 0

Notifications

Tyler Menu

Search

- Enterprise ERP
  - Financials
  - ① Human Capital Management
    - ② Human Resources
      - Personnel Setup
      - Position Control and Budgeting
      - Employee Job/Pay Classification
      - ③ Personnel Actions
        - Actions History Inquiry ★
        - Personnel Actions Entry ★
        - Actions History Reporting ☆
        - Pay Change History Report ☆
        - Action Entry Templates ☆
        - ④ Personnel Action City Excel Form ★
        - User Defined Actions History Data ☆
        - User Defined Export Layouts ☆
        - Employee Add. ☆

1. Choose Human Capital Management

2. Click Human resources tab

3. Next choose personnel actions tab

4. Choose personnel action city excel form to retrieve the document

# Filling Out Personnel Action Form

CITY OF BROCKTON			MUNIS ID #:
NOTIFICATION OF PERSONNEL ACTION			
NAME: (Last, First, MI)	LOCATION CODE:	SOCIAL SECURITY NO. (New Hires Only):	
STREET ADDRESS:		BIRTH DATE:	
CITY:	STATE:	ZIP:	PHONE NUMBER:
NATURE OF ACTION:		EFFECTIVE DATE:	
FROM (Position Title):		STEP:	SALARY:
NAME AND LOCATION OF EMPLOYING OFFICE:			
TO (Position Title):		STEP:	SALARY:
NAME AND LOCATION OF EMPLOYING OFFICE:			
REMARKS:			
			Department Head Signature
DATE PREPARED:			

- Complete all *highlighted areas* on the form.
- Form needs to be approved by Department Head.
- Please keep in mind that the effective date on this form will supersede the effective date entered into the system.

# Sample PA's

\* Note that a PA with this effective date should be submitted two weeks prior (9/22/23) to give time for all departments to review and finalize approvals

For example, if this PA is submitted on the Friday (09/29/23) before the effective date, in doing so, it leaves little room for work to be done by the Human Resources and Auditing departments

<b>CITY OF BROCKTON</b>			MUNIS ID #:
<b>NOTIFICATION OF PERSONNEL ACTION</b>			<b>0</b>
NAME: (Last, First, MI)		LOCATION CODE:	SOCIAL SECURITY NO. (New Hires Only):
<b>Doe, John, M</b>			
STREET ADDRESS:			BIRTH DATE
			<b>00/00/0000</b>
CITY:	STATE:	ZIP:	PHONE NUMBER:
BROCKTON	MA	2301	
NATURE OF ACTION:			EFFECTIVE DATE:
<b>SALARY CHANGE/STEP INCREASE</b> <i>Note that a PA with this effective date should be submitted <u>two weeks prior</u> (9/22/23) to give time for all departments to review and get approval</i>			<b>10/2/2023</b>
FROM (Position Title):			STEP: SALARY:
<b>Admin Assistant 2</b>			<b>Step 1 \$52,000</b>
NAME AND LOCATION OF EMPLOYING OFFICE:			
TO (Position Title):			STEP: SALARY:
<b>Admin Assistant 2</b>			<b>Step 2 \$55,000</b>
NAME AND LOCATION OF EMPLOYING OFFICE:			
REMARKS:			
<b>John Doe - Step increase from 1 to 2 ( Employee Anniversary Date is 10/2)</b>			
Department Head Signature			
DATE PREPARED:	<b>To HR (2) two weeks prior the affective date</b>		

# Entering a Personnel Action

The screenshot displays the Enterprise ERP Landing Page for the City of Brockton - prod. The page features a search bar at the top right and a navigation menu on the left. The navigation menu is organized into a tree structure under the 'Tyler Menu' header. The 'Human Capital Management' tab is selected, and the 'Personnel Actions' sub-tab is highlighted. The 'Personnel Actions Entry' option is also highlighted. The favorites list on the right includes 'Recent Activity', 'Departmental Functions', 'Account Inquiry', 'My Saved Reports', 'Payment Entry', 'Requisition Entry', 'Bill Inquiry', 'Employee Self Service', 'Purchase Order Inquiry', and 'Time Entry'.

- Enterprise ERP
- Financials
- Human Capital Management
- Human Resources
  - Personnel Setup
  - Position Control and Budgeting
  - Employee Job/Pay Classification
  - Personnel Actions
  - Actions History Inquiry ☆
  - Personnel Actions Entry ☆
  - Action Codes ☆
  - Actions History ☆
  - Employee Benefits History ☆
  - Actions History Reporting ☆
  - Miscellaneous Codes ☆
  - Actions Rapid Entry Fields ☆
  - Pay Change History Report ☆
  - Action Entry Templates ☆
  - Personnel Action City Excel Form ☆

Favorites:

- Recent Activity
- Departmental Functions
- Account Inquiry
- My Saved Reports
- Payment Entry
- Requisition Entry
- Bill Inquiry
- Employee Self Service
- Purchase Order Inquiry
- Time Entry

1. Click Human Capital Management

2. Choose Human Resources tab

3. Click Personnel Actions tab

4. Click Personnel Actions and it will take you to the next screen

# Personnel Action Entry

The screenshot shows the 'Personnel Action Entry [LIVE DB CITY OF BROCKTON]' web application. At the top, there are navigation buttons: Close, Accept (circled with a '5'), Cancel, and Query. A handwritten 'Add' and a circled '1' are next to the Accept button. Below this is a search bar and an 'Employee Identification' section with fields for Employee # (circled with a '2'), SSN, Last Name, First Name, Middle Name, and MI. There are tabs for 'Main' and 'Other'. The 'Action Information' section includes 'Effective Date' (circled with a '3'), 'Authorization Date', 'Action Code' (circled with a '4'), 'Reason/Auth', 'Supporting Action', and 'On/Off Boarding Code'. Below these are checkboxes for 'Create Action History Record', 'Employee Initiated', and 'Create Employee Task Lists'. There are also fields for 'Enrollment Campaign', 'Action Category', 'Action Number', 'Approval Date', and 'Status'. At the bottom, there is a 'Comment' section and a footer with '0 of 0' and navigation arrows. A note at the bottom of the page states: 'Employee Number. (from Employee Master)'. Blue lines connect the numbered callouts to the corresponding UI elements.

1. Press Add, then a new window will pop up.

2. Enter Employee # and click tab.

3. Enter Effective date.

4. Pick PA type under action code.

5. Click Accept and Save, then a new window will pop up

Under the comment section you can further explain your PA nature of action for e.g. Step 1 to 2, Address Change, etc.



# Entering a Personnel Action

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Close Search Browse Add Update Delete Output Print Display PDF Save ReadyForms Delivery Definitions Email Schedule Attach Guide Me Detail Output Post Print Browse Data Scheduled Post Create RAP Revoke Menu

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Employee Identification

Employee *	SSN	Last Name	First Name	Middle Name	MI
------------	-----	-----------	------------	-------------	----

Main Other

Action Information

Effective Date *	05/05/2023	Authorization Date	
Action Code *	S100 - SALARY CHANGE	User	
Reason/Autn		Entry Date	05/31/2023
Supporting Action		Entry Time	12:13:43
Cn/Off Boarding Code			

Create Action History Record  
 Employee Initiated  
 Create Employee Task List

Action Category	S SALARY CHANGE
Action Number	530
Approval Date	
Status	N - NOT RELEASED

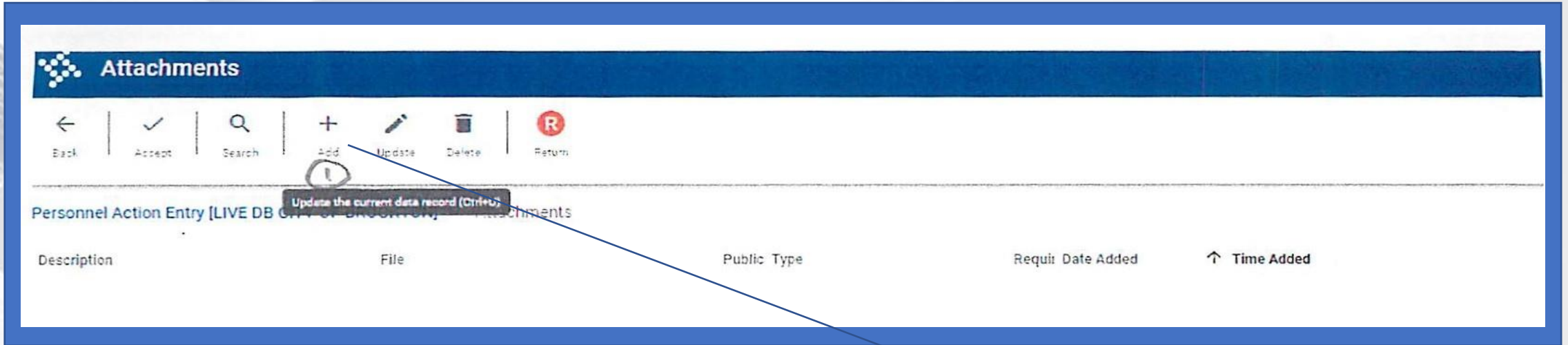
Comment

Electronic File Path

1 of 1 |< < > >| Guide me in entering a new Action. Record(s) added.

- Click attach and a new window will pop up

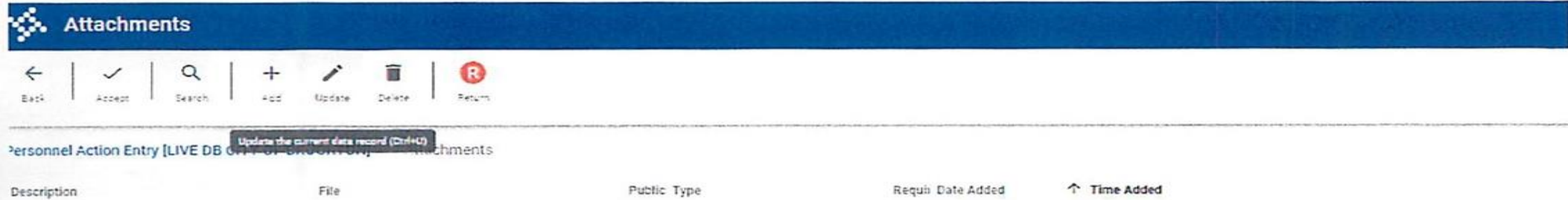
# Entering a Personnel Action



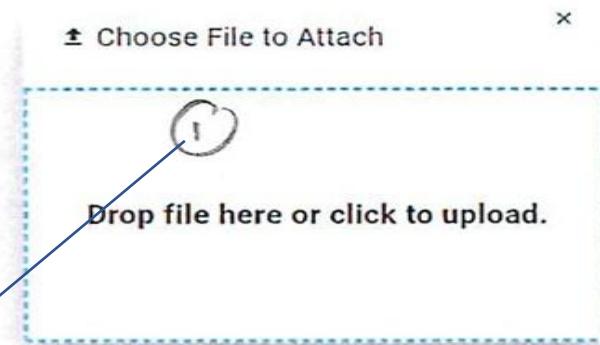
The screenshot shows a web interface titled "Attachments". At the top, there is a dark blue header with the word "Attachments" in white. Below the header is a toolbar with several icons: a left arrow (Back), a checkmark (Accept), a magnifying glass (Search), a plus sign (Add), a pencil (Update), a trash can (Delete), and a red circle with a white 'R' (Return). The "Add" button is circled in red. A tooltip with a clock icon and the text "Update the current data record (Ctrl+U)" is positioned over the "Add" button. Below the toolbar, the text "Personnel Action Entry [LIVE DB C... Attachments" is visible. At the bottom, there is a table with the following headers: "Description", "File", "Public Type", "Requit Date Added", and "Time Added".

- Click Add + then a new window will pop up

# Attachments



- Click and get PA file to attach



# Attachments

The screenshot shows a web application interface for 'Attachments'. At the top, there is a blue header with the word 'Attachments' and a search icon. Below the header is a navigation bar with icons for Back, Accept, Search, Add, Update, Delete, and Return. The main content area displays a table with columns: Description, File, Public Type, Requir, Date Added, and Time Added. A file explorer window is overlaid on the interface, showing the 'This PC' view. The file explorer shows a list of folders, with 'pa folder' selected. Handwritten text in the file explorer reads: 'Choose file to attach (choose from location you saved into)'. The file explorer also shows a 'File name' field and 'Open' and 'Cancel' buttons.

- Double click to choose from location you saved into

# Attachment File Attributes

The screenshot shows a web form titled "Attachment File Attributes" with a breadcrumb trail: "Personnel Action Entry [LIVE DB CITY OF BROCKTON] > Attachments > Attachment File Attributes". The form includes a "Description" field with a character count of 30, a "Description" label, and an "Attachment type" dropdown menu. A checkbox at the bottom is labeled "File can be viewed by non-Munis users". A red error message at the bottom states "A description to be used for this file is required".

Annotations on the screenshot include:

- A blue box at the top right containing the text: "1. For Description, choose file you saved". A line points from this box to the "Description" field.
- A blue box in the middle right containing the text: "2. Press Accept then Save, and a new window will pop up". A line points from this box to the "Accept" button.
- A blue box at the bottom right containing the text: "3. Press Add + to attach additional files. See attached new window". A line points from this box to the "Add +" button.

1. For Description, choose file you saved

2. Press Accept then Save, and a new window will pop up

3. Press Add + to attach additional files. See attached new window

# Attachments

Personnel Action Entry [LIVE DB CITY OF BROCKTON] > Attachments

Description	File	Public Type	Requir	Date Added	Time Added
file name - PA		General	<input type="checkbox"/>	05/31/2023	12:29:37
		General	<input type="checkbox"/>	05/31/2023	12:32:04

- Click the R (return) button and a new window will pop up

# Personnel Action Entry

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Employee Identification

Employee *	SSN	Last Name	First Name	Middle Name	MI
------------	-----	-----------	------------	-------------	----

Main Other

Action Information

Effective Date \* 05/08/2023 Authorization Date

Action Code \* S100 - SALARY CHANGE User

Reason/Auth Entry Date 05/31/2023

Supporting Action Entry Time 12:13:43

On/Off Boarding Code

Create Action History Record

Employee Init. step

Create Employee Task List

Action Category S SALARY CHANGE

Action Number 530

Approval Date

Status N - NOT RELEASED

Comment

Electronic File Path

Guide me in entering a new Action.

- Click R ( release) button and a new window will open up

**PRESS RELEASE**

# Personnel Action Entry

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Employee Identification

Employee #	SSN	Last Name	First Name	Middle Name	MI
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]		

Main Other

Action Information

Effective Date \* 05/08/2023 Authorization Date

Action Code \* S100 - SALARY CHANGE

Reason/Auth

Supporting Action

On/Off Boarding Code

Create Action History Record  
 Employee Initiated  
 Create Employee Task Lists

Action Category S SALARY CHANGE

Action Number 530

Approval Date

Status N - NOT RELEASED

Comment

Electronic File Path

1 of 1 |< < > >|

- Click Yes and a new window will open up



# Personnel Action Entry

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Close Search Browse Add Update Delete Output Print Display PDF Save Fax/Forms Delivery Definitions Email Schedule Attach Backup Data Output Post Proof-Enroll Dates Scheduled Post Create PAF Release Menu

Personnel Action Entry [LIVE DB CITY OF BROCKTON]

Employee Identification

Employee *	SSN	Last Name	First Name	Middle Name	MI

Main Other

Action Information

Effective Date *	05/08/2023	Authorization Date	
Action Code *	S100 - SALARY CHANGE	User	ahatslopoulos
Reason/Auth		Entry Date	05/31/2023
Supporting Action		Entry Time	12:13:43
On/Off Boarding Code			
	<input checked="" type="checkbox"/> Create Action History Record	<input type="checkbox"/> Check to create action history records	<input type="checkbox"/> Checklist
	<input type="checkbox"/> Employee Initiated		<input type="checkbox"/> Notes
	<input type="checkbox"/> Create Employee Team List		<input type="checkbox"/> ESS Comments
Action Category	S SALARY CHANGE		
Action Number	590		
Approval Date			
Status	X - IN PROGRESS		

Comment

Electronic File Path

1 of 1 |< < > >| Guide me in entering a new Action.

1. PA is now released.
2. An email is sent to dept head for approval.
3. Close file

# Personnel Action Entry Approval Screen

**Personnel Action Entry [CITY OF BROCKTON]**

Close | Search | Browse | Add | Update | Delete | Output | Print | Display | PDF | Save | ReadyForms Delivery Definitions

Personnel Action Entry [CITY OF BROCKTON]

**Action Information**

Effective Date \* 01/23/2023

Authorization Date

Action Code \* S100 - SALARY CHANGE

Reason/Auth S109 - EDUCATIONAL INCENTIVE

Supporting Action

On/Off Boarding Code

Create Action History Record

Employee Initiated

Create Employee Task Lists

Action Category S SALARY CHANGE

Action Number 1892

Approval Date

Status X - IN PROGRESS

Comment ED INCENTIVE 3%

Electronic File Path

Workflow

Workflow

My Approvals | Approve | Reject | Hold | Forward | Approvers

- The Entry Date and Entry Time will auto-populate when the action is completed.
- When the PA is at your level the workflow buttons will be useable.
- Click Approvers to verify that it is on your level, then click approve, accept and close window.

# Work Flow status

**Work Flow Status**

Personnel Action Entry [CITY OF BROCKTON] > Work Flow Status

Originator

Name	Comment
------	---------

Approvers' comments

Name	Action taken date	Action taker	Action	Comment
------	-------------------	--------------	--------	---------

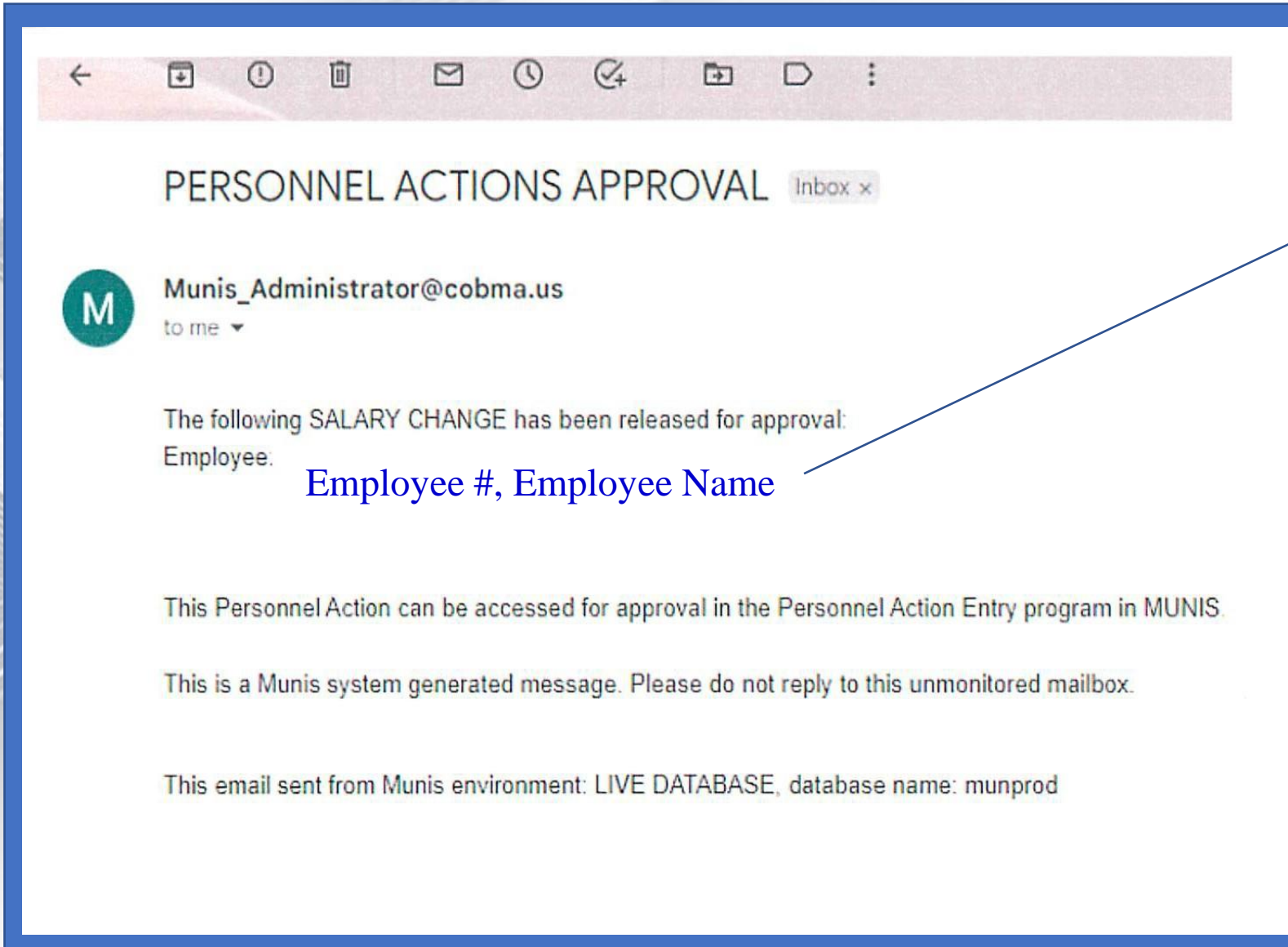
Status	Activated Date	Activated Ti
Complete (Approved)		
In Progress		
Not started		
Queued		

- Department Head Level
- HR Level
- Audit Department Level
- HR/ Department Level

Generate Chart | Expand All | Collapse All | Expand In Progress

- **Reminder!** When you are out of the office, you may want to forward workflow notifications and approval requests to another Munis user.
- PA's must be approved at each level before being completed.
- Starting with department head level, then moving to HR level, followed by auditing department and then back to HR and the corresponding department.

# Personnel Actions Approval Email



- You will receive an email when the Personnel Action approval is on your level
- PA type, along with employee # and name will be included

# ANY QUESTIONS AND CONERNS:

Please feel free to get in touch via the phone and email:

## HUMAN RESOURCES MAINLINE

Phone: 508-580-7820

Email: [hr@cobma.us](mailto:hr@cobma.us)

- \* Marcy Varela – [mvarela@cobma.us](mailto:mvarela@cobma.us)
- \* Jamie Taber – [jtaber@cobma.us](mailto:jtaber@cobma.us)
- \* Colleen Hooke – [chooke@cobma.us](mailto:chooke@cobma.us)
- \* Eisha George – [egeorge@cobma.us](mailto:egeorge@cobma.us)
- \* Dept. Head



*Thank You!*



# BROCKTON

CITY OF CHAMPIONS

