

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

Note: If the ORIGINAL Personnel Action is **CORRECT** however a data entry mistake was made, an email, with a copy of the original PA, may be submitted to the Office of Agency HR Support for a data entry correction.

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
No	Data Change (DTA)	Paid Administrative Leave	Per ORC 124.388 or appropriate Collective Bargaining Agreement (CBA).	ADMLV	Enter Eff Dates	Active	Active
Yes	Data Change (DTA)	Appointment Type Change	i.e. PERM/TEMP, FT/PT - Utilized for a CURRENT change. IF the change is required on the actual position, this change must first be completed in Position Mgt. which will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A		Active	Active
	Data Change (DTA)	Batch - Not specified	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (Utilized when a systematic, across the board update is completed)	N/A		Active	Active
	Data Change (DTA)	Batch Job	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (Utilized when a systematic, across the board update is completed)	N/A		Active	Active
Yes	Data Change (DTA)	Cancel - Promotion	Utilized for cancelling a promotion.	N/A		Active	Active
Yes	Data Change (DTA)	Cancel Internal Interim-BU	Utilized for entering an "end date" for an internal interim for a bargaining unit EE. Note: Inactivate the PN once the interim appt. is cancelled.	N/A		Active	Active
Yes	Data Change (DTA)	CBU Exemption (Fid/Confiden)	Utilized when a position is changed from BU to Exempt. A change will <u>always</u> be required in Position Mgt and MUST BE completed there first which will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A		Active	Active
Yes	Data Change (DTA)	Correction - Appointment Date	CORRECTION MODE WILL NORMALLY BE UTILIZED for this correction and therefore the CORRECTED PA is to be submitted to DAS, Agency HR Support within 30 days of the Appointment Date. <u>Note:</u> DAS, Agency HR Support will determine if a new row utilizing this Action/Reason is required.	N/A		Active	Active
Yes	Data Change (DTA)	Correction - Appointment Type	i.e. PERM/TEMP, FT/PT - Utilized for a data entry ERROR change. IF the change is required on the actual position, this change must first be completed in Position Mgt. which will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A	Enter actual effective date	Active	Active
Yes	Data Change (DTA)	Correction - Cvl Svc Status	i.e. CLASSIFIED/UNCLASSIFIED - DAS MUST ENTER - Submit PA to DAS, Agency HR Support in order to CORRECT an EE's's civil service status (Classified/Unclassified).	N/A		Active	Active
Yes	Data Change (DTA)	Correction - SSN	Utilized to correct an EE's Social Security Number	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
Yes/No	Data Change (DTA)	Correction - Step	Utilized to correct an EE's Pay Range step. If Agy needs DAS to make change, an email will suffice UNLESS the original entry was completed by PA (e.g. promotion, reassignment) then a CORRECTED PA must be submitted.	N/A		Active	Active
Yes/No	Data Change (DTA)	Correction - Step and Step Date	Utilized to correct an EE's Pay Range step. If Agy needs DAS to make change, an email will suffice UNLESS the original entry was completed by PA (e.g. promotion, reassignment) then a CORRECTED PA must be submitted.	N/A		Active	Active
No	Data Change (DTA)	Correction - Step Date	Utilized to correct an EE's Step Date.	N/A		Active	Active
Yes	Data Change (DTA)	Correction - Svc After RFL	DAS MUST ENTER THIS CORRECTION - Submit PA to DAS, Agency HR Support to correct an EE's service time upon a Return from Leave. NOTE: Agency to make necessary leave balance adjustments.	(A)		Active	Active
	Data Change (DTA)	DAS - Class Plan Change	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY	N/A		Active	Active
Yes (B)	Data Change (DTA)	Discipline - Leave Debit	Utilized for the decrease of leave for a disciplinary reason.	REDUV		Active	Active
Yes (B)	Data Change (DTA)	Discipline - Penalty Fine	Utilized for a fine for a disciplinary reason.	N/A		Active	Active
Yes (B)	Data Change (DTA)	Discipline - Working Suspension	Utilized for a working suspension for a disciplinary reason.	N/A		Active	Active
Yes	Data Change (DTA)	Displacement	Utilized when an EE displaces another EE as a result of a layoff.	N/A		Active	Active
No	Data Change (DTA)	Elected Off Class Plan Change	ELECTED OFFICIAL AGENCIES ONLY - To change an EE's classification as part of a Class Plan Change	N/A		Active	Active
No	Data Change (DTA)	Empl Class Change	Utilized when changing the "Empl Class" field (i.e. retirement info)	N/A		Active	Active
Yes	Data Change (DTA)	End Cancel Internal Temporary	Utilized when ending an internal temporary appointment. <i>Note: Inactivate the PN once the temporary appt. is cancelled.</i>	N/A		Active	Active
Yes	Data Change (DTA)	End Temporary Working Level	Utilized to end an EE's TWL. Note: NEVER enter both the PA for the start of the TWL (i.e. Data Change/TWL) and the end of the TWL on the same day.	N/A		Active	Active
Yes	Data Change (DTA)	Extend Temporary Position	ONLY required when an "End Date" has been utilized in Job Data	N/A		Active	Active
Yes	Data Change (DTA)	Fixed Term Ends	Utilized for ending a Fixed Term EE's appointment when being reappointed. Note: For tracking purposes	N/A		Active	Active
Yes	Data Change (DTA)	Fixed Term Reappointed	Utilized for the reappointment of a Fixed Term EE.	N/A		Active	Active
Yes	Data Change (DTA)	Grievance Adjustment	Utilized to make date(s) adjustment as a result of a grievance settlement	N/A		Active	Active
Yes	Data Change (DTA)	Grievance Term Adjustment	Utilized to adjust a Termination as a result of a grievance settlement IF the settlement does not mention removing all reference to termination. Note: May require other Job Data entry.	N/A		Active	Active

(B) PA is required but shall be returned/retained to/by the agency. Copy will NOT be placed in permanent EE file located at DAS.

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
Yes	Data Change (DTA)	HQ Location Change	Utilized for movement of an EE from one headquarter to another. Will normally be used in conjunction with another A/R. Note: If moving the EE in their current PN from one "location" to another, the change would need to first be completed in Position Mgt will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A		Active	Active
Yes	Data Change (DTA)	Internal Interim-BU Over 120 Days	To hire a bargaining unit EE into an internal interim PN. Note: A permanent PN must first be created in Position Mgt. which will then be "inactivated" once the interim appt. is cancelled.	N/A	Enter Eff Dates	Active	Active
No	Data Change (DTA)	Judicial Transfer	SUPREME COURT USE ONLY - utilized for transfer	N/A		Active	Active
Yes	Data Change (DTA)	Lateral Move	Utilized for the lateral move of an EE from one PN to another, same pay range.	N/A		Active	Active
Yes	Data Change (DTA)	Layoff Pending Return from Dis	Utilized for an EE who is on disability when a layoff occurs. Note: The Layoff is not official for this EE until his/her disability ends.	N/A		Active	Active
Yes	Data Change (DTA)	Name Change	Utilized to change an EE's name. Note: Effective date must be the beginning of a pay period.	N/A		Active	Active
Yes	Data Change (DTA)	Position Number Change	Utilized for moving an EE from one Position Number (PN) to another PN when there is NO change in Job Code or pay range.	N/A		Active	Active
Yes	Data Change (DTA)	Probationary Period Extension	Utilized to extend an EE's probationary period	N/A		Active	Active
Yes	Data Change (DTA)	Reassigned - No Pay Inc	Utilized when an EE is reassigned with NO pay increase. This must begin with an entry in Position Mgt (POS / JRC) which will create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: You must delete the PN, re-type the PN, and then "tab" off the field prior to "Saving".	N/A		Active	Active
Yes	Data Change (DTA)	Reassigned - Pay Increase	Utilized when an EE is reassigned WITH a pay increase. This must begin with an entry in Position Mgt (POS / JRC) which will create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: You must delete the PN, re-type the PN, and then "tab" off the field prior to "Saving".	N/A		Active	Active
Yes	Data Change (DTA)	Reassigned 3rd Party	Utilized when an EE is reassigned by a 3rd party (e.g. SPBR, arbitration). This must begin with an entry in Position Mgt which will create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: You must delete the PN, re-type the PN, and then "tab" off the field prior to "Saving".	N/A		Active	Active
Yes	Data Change (DTA)	Recall from Displacement	Utilized when an EE is recalled from Displacement (i.e. lay off).	N/A		Active	Active
Yes	Data Change (DTA)	Return from Salary Continuatio	Utilized when an EE is returning from Salary Continuation leave	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
No	Data Change (DTA)	Salary Continuation	Utilized for an EE with a work related injury, with the exception of injury by ward of state (see "OIL"), for Exempt and Bargaining Unit EEs. Note #1: Pays 480 hours at 100%. Note #2: Can not be used to extend OIL.	SALCN, FMSAL		Active	Active
Yes/No	Data Change (DTA)	Service Change	ONLY used by DAS, Agency HR Support for service time correction or by agency Labor Relations Officers to correct seniority credits ONLY.	N/A		Active	Active
Yes	Data Change (DTA)	Status - Civil Service Status	i.e. CLASSIFIED/UNCLASSIFIED - To change an EE's civil service status WITH a PN change and (e.g.) promotion, transfer, appointment type change. DAS MUST ENTER any change to an EE's civil service status in his/her current position when there is a change in duties that make the position Unclassified or Classified. Submit PA to DAS, Agency HR Support.	N/A		Active	Active
Yes	Data Change (DTA)	Step Denied	Utilized for denying a step through the Performance Eval process when completed PRIOR TO the step change in OAKS. Must also change the "Step Entry Date" in OAKS.	N/A		Active	Active
Yes	Data Change (DTA)	Step Reduction	Utilized for a step reduction as a result of discipline. Must also change the "Step" and the "Step Entry Date".	N/A	Yes	Active	Active
Yes	Data Change (DTA)	Step X (90)	Utilized to place an EE in a "Step X" by (e.g.) Job Audit, SPBR, Class Plan Change.	N/A		Active	Active
No	Data Change (DTA)	Stop Wage Progression Flag Updated	Utilized to stop or start wage progression.	N/A		Active	Active
Yes	Data Change (DTA)	Temp Internal - Extd Leave	Utilized when placing a current EE in a temporary appointment behind an EE on extended leave. The appointment may only be for the duration of the extended leave, NO overlap is allowed. Note: A permanent PN must first be created in Position Mgt. which will then be "inactivated" once the temporary appt. is cancelled.	N/A	Enter Eff Dates of Leave	Active	Active
No	Data Change (DTA)	Temporary FLSA Status Change	i.e. OT ELIGIBLE/OT EXEMPT - This change must first be completed in Position Mgt. which will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A	Enter Eff Dates	Active	Active
No	Data Change (DTA)	Temporary FLSA Status Return	i.e. OT ELIGIBLE/OT EXEMPT - This change must first be completed in Position Mgt. which will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A		Active	Active
Yes	Data Change (DTA)	Temporary Work Level	Utilized to place an EE in a TWL.	N/A	Enter Eff Dates	Active	Active
	Data Change (DTA)	Time and Labor Self Service	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (to denote that EE(s) are now on OAKS Time & Labor Self Service)			Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY **Changes** **New**

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
	Data Change (DTA)	Wage Progression Step	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (to denote a step increase).			Active	Active
Yes	Demotion (DEM)	Demotion	Utilized to demote an EE	N/A		Active	Active
No	Hire (HIR)	Conversion Hire	DAS USE ONLY - Utilized to bring over hire dates of EEs from HR2K to OAKS	N/A		Active	Active
Yes	Hire (HIR)	Established Term	Utilized to hire established term appointments (ETA), Bargaining Unit or Exempt, NOT otherwise specifically defined in Collective Bargaining Agreements (CBAs) as "Regular" or "Irregular" (See Hire - "Estbl. Term-Regular BU" or "Estbl. Term-Irregular BU")	N/A		Active	Active
Yes	Hire (HIR)	Estbl. Established Term - Irregular BU	Utilized for the hire of EEs, specifically defined in Collective Bargaining Unit Agreements (CBAs) (e.g. OCSEA, DNR specific language - do NOT work a normal 40-hour week and instead are provided a identified number of hours each fiscal year in excess of 720/1000 hrs.)	N/A		Active	Active
Yes	Hire (HIR)	Estbl. Established Term - Regular BU	Utilized for the hire of EEs, specifically defined in Collective Bargaining Unit Agreements (CBAs), (e.g. OCSEA, DNR specific language - work 40-hour weeks for a specific period of time within a fiscal year [i.e. usually more than 14 weeks but for a "season"]).	N/A		Active	Active
Yes	Hire (HIR)	External Interim-BU	Utilized to hire an external person into a unclassified bargaining unit interim PN. <i>Note: A temporary, unclassified PN must first be created in Position Mgt. which will then be "inactivated" once the interim is cancelled.</i>	N/A	Enter Eff Dates of Leave	Active	Active
Yes	Hire (HIR)	Fixed-Term Per Diem	Utilized to hire an EE into a Fixed-Term Per Diem PN	N/A		Active	Active
Yes	Hire (HIR)	Fixed-Term Salaried	Utilized to hire an EE into a Fixed-Term Salaried PN	N/A		Active	Active
Yes	Hire (HIR)	Intermittent	Utilized to hire an unclassified EE for an Intermittent assignment (max 1000 hrs/calendar year). If utilizing a "permanent" PN (rather than creating a new one), first go to Position Mgt and change position to "Temporary".	N/A		Active	Active
Yes	Hire (HIR)	Permanent	Utilized to hire an EE into a Permanent PN	N/A		Active	Active
Yes	Hire (HIR)	Project EE	Utilized to hire an EE into a Project EE PN	N/A		Active	Active
Yes	Hire (HIR)	Seasonal	Utilized to hire an EE into a Seasonal PN	N/A		Active	Active
Yes	Hire (HIR)	Temp External - Extended Leave Over 120 Days	Utilized to hire an unclassified EE into a Temporary PN for an EE who is on extended leave. May only be for the length of extended leave, no overlap. <i>Note: A temporary, unclassified PN must first be created in Position Mgt. which will then be "inactivated" once the temporary appt. is cancelled.</i>	N/A	Enter Eff Dates of Leave	Active	Active
Yes	Hire (HIR)	Temp External Under 120 Days & Under	Utilized to hire an unclassified EE into a Temporary PN for a VACANT position. May NOT exceed 120 Days. <i>Note: A temporary, unclassified PN must first be created in Position Mgt. which will then be "inactivated" once the temporary appt. is cancelled.</i>	N/A	Enter Last Possible Ending Date	Active	Active
Yes	Hire (HIR)	Temporary	Utilized to hire an EE into a Temporary PN (e.g. college interns)	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
Yes	Leave of Absence (LOA)	EX Leave - Personal	Utilized for an Exempt EE who goes on personal leave of absence in excess of 80 hours.	Closes Timesheet	Enter Eff Dates of Leave	Active	Inactive
No	Leave of Absence (LOA)	EX Workers Comp	Utilized for an Exempt EE who 1) has a "pending" Workers' Comp claim and is in an UNPAID status or 2) has actually been approved for Workers' Comp. pay and: a) chooses to waive his/her health care benefits or b) is more than 30 days late paying his/her share of their health insurance premium and has been provided a 15 day notice of cancellation (Note: DAS/HCM Benefits must be notified to enter a "LOC" to stop ER's's share of health care premium). Note: If the employee is SUPPLEMENTING his WC pay with paid leave, do NOT use this Action/Reason.	Closes Timesheet	Enter Eff Dates of Leave	Active	Inactive
Yes	Leave of Absence (LOA)	Exempt Educational Leave	Leave of Absence for an Exempt EE on educational leave.	Closes Timesheet	Enter Eff Dates of Leave	Active	Inactive
Yes	Leave of Absence (LOA)	Leave - Established Term	Utilized for placing any Estbl. Term appointment on a leave of absence. This "reason" will generate an event in Benefits (ETR) for the EE to "waive" or "continue" health care benefits but the EE will be responsible for both shares of the cost. Requires action in Benefits module. Note: Can use "LOA/Estbl. Term or Seasonal" which will NOT create an event in Benefits and therefore choosing "waive" will NOT be required..	Closes Timesheet		Active	Inactive
Yes	Leave of Absence (LOA)	Military Leave – Federal Duty	Utilized when an EE is on Federal Duty (i.e. Exec Order of President b/c of Act of Congress OR Gov's directive pursuant to ORC Section 5919.29) and chooses NOT to continue State medical insurance.	Closes Timesheet	Enter Eff Dates of Leave	Active	Inactive
Yes	Leave of Absence (LOA)	Military Leave – State	Utilized when an EE is called to State active duty NOT under ORC 5919.29 and has exhausted all paid leave (military and other).	Closes Timesheet	Enter Eff Dates of Leave	Active	Inactive
Yes	Leave of Absence (LOA)	Seasonal or Estbl. Term Interruption	Utilized when placing a Seasonal or any type of Estbl. Term EE on leave of absence when he/she is not eligible or chooses NOT to continue their medical coverage. A "TER" (Terminate) event is generated in Benefits so no action is required to "waive" coverage.	Closes Timesheet		Active	Inactive
Yes	Pay Rate Change (PAY)	Bilingual Change	Utilized to add, change or remove a supplement for bilingual EEs. Note: must be in the Position Description.	N/A		Active	Active
Yes	Data Change PAY RATE CHG (PRC)	Correction - Pay Rate	Utilized to correct a pay rate for an EE paid via Schedule E2, E3 or E4	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
Yes	Pay Rate Change (PAY)	Educational Attainment Change	Utilized for an EE who would receive a pay increase due to educational attainment. This change would need to first be completed in Position Mgt will then create a row in Job Data with a Seq "0". The row entry in Job Data utilizes the same "Effective Date" that is in Position Mgt with a Seq "1". Note: Verify that Seq 1 information is correct AFTER the "Save" is completed.	N/A		Active	Active
Yes	Pay Rate Change (PAY)	Elect Office Increase Declined	Utilized when an elected official declines a pay increase.	N/A		Active	Active
Yes	Pay Rate Change (PAY)	Elected Office Rate Increase	Utilized when an elected official receives a pay increase.	N/A		Active	Active
Yes	Pay Rate Change (PAY)	Hazardous Duty Change	Utilized for a change in hazardous duty pay.	N/A		Active	Active
No	Pay Rate Change (PAY)	Pay Range Reassigned	DAS USE ONLY - To change the pay range which starts in Pos Mgt.	N/A		Active	Active
Yes	Pay Rate Change (PAY)	Professional Achievement Change	Utilized for a pay rate change as described in OAC 123:1-37-08	N/A		Active	Active
Yes	Pay Rate Change (PAY)	Rate Change	Utilized when an EE requires a rate change	N/A		Active	Active
Yes	Pay Rate Change (PAY)	Step Denied	Utilized for denying a step through the Performance Eval process when completed AFTER the step change in OAKS. Must also change the "Step" and the "Step Entry Date" in OAKS.	N/A		Active	Active
Yes	Data Change PAY RATE CHG (PRC)	Supplement Change - OTHER	Utilized when changing an EE's pay supplement(s) when there is no "specific" "Pay Rate Chg" reason.	N/A		Active	Active
	Pay Rate Change (PRC)	Batch - Longevity Increase	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (when LONGEVITY Batch rows are put onto EE Job Data records).	N/A		Active	Active
	Pay Rate Change (PRC)	Batch Supp Pay	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (when Batch rows are put onto EE Job Data records changing any pay supplement EXCEPT longevity).	N/A		Active	Active
	Pay Rate Change (PRC)	Collective Bargaining Change	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (for Job Data rows denoting an annual pay rate increase under the collective bargaining agreement).	N/A		Active	Active
	Pay Rate Change (PRC)	House Bill 119	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (for Job Data rows denoting an annual pay rate increase in EEs not directly covered under the collective bargaining agreement).	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY **Changes** **New**

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
No	Payroll Leave Action (PLA)	Non-Paid Administrative Leave	Utilized for an EE who is placed on NON-PAID administrative leave per ORC 124.388 for a period not to exceed 2 months. The ER is required to continue paying the ER's share of health care premium <u>AS LONG AS</u> the EE continues to pay his/her share through direct pay. IF the EE becomes more than 30 days late paying his/her share of their health insurance premium and has been provided a 15 day notice of cancellation, their health insurance is to be dropped (Note: DAS/HCM Benefits must be notified to enter a "LOC" to stop ER's's share of health care premium).	NPDLV	Enter Eff Dates of Leave	Active	Active
No	Payroll Leave Action (PLA)	Adoption Childbirth Leave	Utilized for an EE who is out on adoption or childbirth leave. Note: If the EE extends the normal 6 weeks of leave in an UNPAID status, his Job Data A/R must be changed to an "PLA/FMLA".	Birth, Adoption, FMLA/Birth or Adopt TRC's		Active	Active
Yes	Payroll Leave Action (PLA)	BU Educational Leave	Utilized for a Bargaining Unit EE on educational leave. This A/R is treated as an "LOA in HCM Benefits", however if CBA requires the State to pay Dental/Vision ONLY when the EE pays both shares of the health insurance, contact DAS, Benefits Rep for instruction.	EDUNP		Active	Active
Yes	Payroll Leave Action (PLA)	BU Personal Leave	Utilized for a Bargaining Unit EE on personal leave. This A/R is treated as an "LOA in HCM Benefits" however if CBA requires the State to pay Dental/Vision ONLY when the EE pays both shares of the health insurance, contact DAS, Benefits Rep for instruction.	NOPAY, NPDLV		Active	Active
No	Payroll Leave Action (PLA)	Workers Comp Pay	Utilized as follows: 1) when the State is required to pay the 1st 7 days; 2) when a BU EE has been approved for Workers' Comp and it is during the 24-month period in which the State is required to pay both the ER and EE share of health insurance; 3) if the EE is Exempt and is supplementing his/her WC pay with paid leave (therefore his/her health insurance deduction continues); and/or 4) has a WC claim that is being run concurrently with FMLA (Note: the EE must pay his/her share of the health care premium).	WCREG, Paid Lv, FMLA		Active	Active
No	Payroll Leave Action (PLA)	BU-Workers Comp Pending	Utilized for BU EEs who are in an unpaid status awaiting approval of a Workers' Comp claim in order to advance payment of his/her health insurance premium.	WCPND		Active	Active
No	Payroll Leave Action (PLA)	Disability Pay	Utilized for an EE who is out on disability leave.	Disability, FMLA/Disb TRCs		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY **Changes** **New**

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
No	Payroll Leave Action (PLA)	FMLA With Benefits	Utilized for an EE who is going to be off for more than a full pay period for FMLA purposes when no other type of "PLA" (e.g. disability) is applicable. The ER's is required to continue paying the ER's's share of health care premium <u>AS LONG AS</u> the EE continues to pay his/her share (through the use of Paid leave or direct pay if on NON-paid leave). IF the EE becomes more than 30 days late paying his/her share of their health insurance premium and has been provided a 15 day notice of cancellation, their health insurance is to be dropped (Note: DAS/HCM Benefits must be notified to enter a "LOS" to stop ER's's share of health care premium).	FMLA TRCs	Enter Eff Dates of Leave	Active	Active
No	Payroll Leave Action (PLA)	Leave - Union	Utilized to place an EE on UNPAID "union" leave.	UNPDL	Enter Eff Dates of Leave	Active	Active
Yes	Payroll Leave Action (PLA)	Military Leave Federal Duty	Utilized when an EE is on Federal Duty (i.e. Exec Order of President b/c of Act of Congress OR Gov's directive pursuant to ORC Section 5919.29) and chooses TO CONTINUE State medical insurance. The employee is responsible for his/her shard of the premium and the state is responsible for the ER's's share of cost.	MILLV (176), Other Paid Leaves, MILNR (No pay)	Enter Eff Dates of Leave	Active	Active
Yes	Payroll Leave Action (PLA)	Military Leave State	Utilized when an EE is called to State active duty NOT under ORC 5919.29 and is still using paid leave (military and other).	MILLV (176) & other Paid Leaves	Enter Eff Dates of Leave	Active	Active
Yes	Payroll Leave Action (PLA)	Military Lv Fed Duty D-V Only	Utilized when an EE is on Federal Duty (i.e. Exec Order of President b/c of Act of Congress OR Gov's directive pursuant to ORC Section 5919.29) and chooses TO CONTINUE State insurance for Dental/Vision ONLY. The state is responsible for the ER's's share of cost.	MILLV (176), Other Paid Leaves, MILNR (No pay)	Enter Eff Dates of Leave	Active	Active
Yes	Payroll Leave Action	Non-FMLA Lv D/V ONLY Exempt-Educational Leave	Utilized when required by CBA for an EE on non-paid, non-FMLA leave, however the State is required to continue to pay Dental/Vision coverage AS LONG AS the EE pays both shares of the health insurance premium. Note: Will need to contact DAS, Benefits Rep to assure D/V continues to be paid.	Appropriate Non-Paid TRC		Active	Active
No	Payroll Leave Action (PLA)	Occupational Injury Leave	Utilized for an EE on OIL when injured by a "ward of state".	OILLV, FOILV	Enter Eff Dates of Leave	Active	Active
No	Payroll Leave Action (PLA)	Pending Disability Pay	Utilized for an EE who is waiting for disability claim approval.	Leave TRCs or DSPND		Active	Active
Yes	Payroll Leave Action (PLA)	Voluntary Cost Savings	Utilized to place an EE who is taking a VCS period which exceeds 1 full pay period.	VCSLV	Enter Eff Dates of Leave	Active	Active
No	Position Change	Class Plan Change	DAS USE ONLY - To change an EE's classification as part of a Class Plan Change	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
No	Position Change	Department ID Change	Utilized when changing an EE's Dept ID - MUST always be the first date of a pay period	N/A		Active	Active
No	Position Change	FLSA Status Change	Utilized when changing the FLSA Status of an EE	N/A	Reason for Change	Active	Active
Yes/No	Position Change	General Information Change	Utilized when making a Position change that isn't covered under another position reason code - may require a PA.	N/A		Active	Active
No	Position Change	Intermittent Bargaining Change	DAS USE ONLY - To change a position's status due to CBA change placing intermittents in BU.	N/A			
Yes	Position Change	Job Re-classification	Utilized when changing the classification of a position THAT IS FILLED . Note: see various DTC - "reassignments" for required entry in Job Data if the position is filled.	N/A		Active	Active
No	Position Change	Part-Time Std Hours Update	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (Utilized when a Batch is run in OAKS to update the Part-Time Standard hours for positions)	N/A		Active	Active
No	Position Change	Position Abolishment	This Action/Reason should NOT appear in Job Data: only VACANT positions can be abolished/deleted (i.e. inactivated).	N/A		Active	Active
Yes/No	Position Change	Position Location Change	Utilized when changing an EE's work location - may require a PA if headquarter county change is required.	N/A		Active	Active
No	Position Change	Position Reclassification	This Action/Reason should NOT appear in Job Data: Position Reclassification is to only be used for reclassifying a VACANT position	N/A		Active	Active
Yes/No	Position Change	Position Status Change	Utilized for 1) re-activating a position that was abolished/deleted 2) changing a position from proposed to approved or vice-versa and 3) updating an EE's Appointment Type - will appear as a Seq 0 row in Job Data, requires a PA for DTA/CAT or DTA/APC row as Seq 1.	N/A		Active	Active
No	Position Change	Reports To Change	Utilized when changing an EE's supervisor - MUST always be the first date of a pay period, Note: Keep in mind, FIN Travel and Expense may be affected by a change to this field.	N/A		Active	Active
Yes	Position Change	Teacher Educational Attainment	Utilized when changing a Teacher's classification due to educational attainment. This will create a row in Job Data. You MUST add a row, utilizing "Seq 1" for the A/R "Pay Rate Change/Educational Attainment Change".	N/A		Active	Active
No	Position Change	Title Change	Utilized when changing an EE's Working Title.	N/A		Active	Active
Yes	Promotion (PRO)	Promotion	Utilized when entering a promotion for an EE	N/A		Active	Active
Yes	Rehire (REH)	Recall from Layoff	Utilized when recalling an EE to the Agency they were laid off from.	N/A		Active	Active
Yes	Rehire (REH)	Reemployment from Layoff	Utilized when recalling an EE to a different Agency then originally laid off from.	N/A		Active	Active
Yes	Rehire (REH)	Rehire	Utilized for rehiring an EE.	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY **Changes** **New**

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
Yes	Rehire (REH)	Rehire - Retiree	Utilized for rehiring an EE who retired. Must be utilized for every type of rehire of a retiree.	N/A		Active	Active
Yes	Rehire (REH)	Reinstated by 3rd Party	Utilized for rehiring an EE when reinstated by a 3rd party (i.e. arbitration, settlement, or SPBR).	N/A		Active	Active
Yes	Rehire (REH)	Reinstated from Separation	Utilized for the rehire from a disability separation or disability retirement.	N/A		Active	Active
Yes	Rehire (REH)	Rescind Separation	Utilized for rehiring an EE who changed his/her mind about leaving.	N/A		Active	Active
Yes	Reinstate from Suspension (REC)	Recall from Suspension	Utilized for returning an EE to payroll from a unpaid suspension.	N/A		Active	Active
Yes	Retirement (RET)	Disability Retirement	Utilized for separating an EE who disability retires.	Closes Timesheet		Inactive	Inactive
Yes	Retirement (RET)	Retirement	Utilized for separating an EE due to retirement.	Closes Timesheet		Inactive	Inactive
Yes	Return from Leave (RFL)	Return from Leave	Utilized when an EE is returning from all types of leave, except for Military Leave	(A)		Active	Active
	Return from Leave (RFL)	Return from Leave - Batch	NEVER USED FOR ENTRY, SYSTEM GENERATED ONLY (Utilized when a systematic, across the board update is completed)	N/A		Active	Active
Yes	Return from Leave (RFL)	Return from Military	Utilized when an EE is returning from Military Leave	(A)		Active	Active
Yes	Return from seasonal leave (RFS)	Return from seasonal leave (RFS)	Utilized when an EE is returning from seasonal/establish term seasonal leave	N/A	use to enter the expected end date	Active	Active
Yes	Seasonal leave (SLV)	Seasonal Leave with Benefits(WBN)	Utilized when an EE is going on seasonal interruption and retaining Health Benefits	N/A	use to enter expected return date	Active	Inactive
Yes	Seasonal leave (SLV)	Seasonal Leave without Benefits(WOB)	Utilized when an EE is going on seasonal interruption and not retaining or not eligible for Health Benefits.	N/A	use to enter expected return date	Active	Inactive
Yes	Suspension (SUS)	Discipline - Suspension	Utilized for placing an EE on unpaid suspension.	Closes Timesheet		Active	Inactive
Yes	Terminated with Pay (TWP)	Disability Sep with Insurance	Utilized for separating an EE when an EE is still eligible for health care benefits as a result of disability or Workers' Comp.	Disability TRCs		Inactive	Active
Yes	Terminated with Pay (TWP)	Termination with Pay	Utilized for separating an EE when he/she is still due disability pay.	Disability, FMLA/Disb TRCs		Inactive	Active
Yes	Termination (TER)	Cancel Appointment	Utilized to cancel the appointment of an EE.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Death	Utilized when an EE has died.	Closes Timesheet		Inactive	Inactive

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
Yes	Termination (TER)	Disability Sep - No Ins	Utilized to separate an EE when all disability benefits have been exhausted or when an Agency is no longer required to pay health insurance for an EE on Workers' Comp.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	End Fixed-Term	Utilized to separate fixed term appointments when they have NOT been re-appointed.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	End Interim Separation -BU	Utilized when ending a Bargaining Unit external interim appointment. <i>Note: "Inactivate" PN once the interim appt is cancelled.</i>	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	End Temporary Appointment	Utilized for ending External Temporary appointments	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Layoff	Utilized to enter a layoff for an EE	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Layoff at Return from Disability	Utilized to enter a layoff an EE who was on disability at the time of the layoff.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Other Removal Separation	Utilized for separation of an EE not otherwise specified and NOT for disciplinary reasons.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Probationary Removal	Utilized for removal of an EE who is on probation.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Removed	Utilized for removal of an EE due to disciplinary reasons.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Resignation	Utilized for termination of an EE who resigned.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Resigned - Not in Good Stand	Utilized for resignation in lieu of discipline or to settle grievances for appeals for offenses such as absenteeism, tardiness, insubordination, failure to meet/maintain minimum quals, inefficiency or neglect of duty.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Resigned - Not Recomd Rehire	Utilized for resignation in lieu of discipline or to settle grievances for appeals when an egregious offense of a criminal or quasi-criminal nature is known or suspected.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Unclassified Removal	Utilized for removal of an unclassified EE for disciplinary reasons.	Closes Timesheet		Inactive	Inactive
Yes	Termination (TER)	Unclassified Separation	Utilized for separation of an unclassified EE for reasons OTHER than discipline (e.g. position no longer needed).	Closes Timesheet		Inactive	Inactive
Yes	Transfer (XFR)	Transfer between Agency	Utilized when an EE is going to transfer from one agency to another. <i>Note: Entry should not be completed until the releasing agency has finalized payroll.</i>	N/A		Active	Active
Yes	Transfer (XFR)	Transfer within Agency	Utilized when an EE is going to transfer within an agency. <i>Note: If the EE is changing payrolls, entry should not be completed until the releasing site or area has finalized payroll.</i>	N/A		Active	Active
Yes	Unclassified Revocation	Fall Back Rights-Exercised	When the Appt Authority demotes from or revokes the appointment of an EE in an unclassified position and the EE has fall back rights.	N/A		Active	Active

OAKS JOB DATA AND POSITION MGT - ACTION/REASON LISTING

ER = Employer EE = EE

(A) May require a leave balance adjustment, utilize appropriate TRCs

Used by Specific Agys ONLY

Changes

New

PA Req'd	Action	Reason	Description/Comments	Must Use TRC	Notepad	HR Status	Payroll Status
	Data Change	Conversion - TWL	INACTIVATE			Active	Active
	Data Change	Correction - Job Code	INACTIVATE			Active	Active
	Data Change	Extend Leave	INACTIVATE - No longer use "End Date" so not needed.			Active	Active
	Data Change	Internal Interim Temporary Assignment	INACTIVATE			Active	Active
	Data Change	Reclassification	INACTIVATE - See "Reassignment" for Job Data entry when position is filled.			Active	Active
	Hire	Emergency	INACTIVATE - No longer code/rule language for emergency apptmt.			Active	Active
	Leave of Absence	EX FMLA	INACTIVATE - Timesht closes, would not allow capture of FMLA hours.			Active	Inactive
	Leave of Absence	FMLA without Benefits	INACTIVATE - Timesht closes, would not allow capture of FMLA hours.			Active	Inactive
	Leave of Absence	Voluntary Cost Savings	INACTIVATE - Timesht closes, would not allow capture of VCS hours.			Active	Inactive
	Pay Rate Change	Correction - Teacher Pay	INACTIVATE			Active	Active
	Pay Rate Change	R&C Exec Secretary Supplement	INACTIVATE			Active	Active
	Payroll Leave Action	Leave - Established Term - BU	INACTIVATE			Active	Active
No	Payroll Leave Action (PLA)	FMLA without Benefits - BU	Inactivate			Active	Active
	Position Change	Conversion	INACTIVATE			Active	Active
	Return from Leave	Return from Salary Continuation	INACTIVATE			Active	Active
	Return from Temp Assignment	Cancel Interim	INACTIVATE			Active	Active
	Return from Temp Assignment	Return from Temp Assignment	INACTIVATE			Active	Active