



CREATE AND MANAGE EMPLOYEE INFORMATION

EX

QUICK REFERENCE GUIDE EX-09

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Create and Manage Employee Information, including bank account and manager information, in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of creating and managing employee information. This includes setting up employee's bank account, editing or end dating employee's bank account, and managing employee's manager.

Setup Employee's Bank Account

To setup employee's bank account, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **My Client Groups** tab and click the **Person Management** app.



- The **Person Management: Search** page opens. Enter information on at least one of the fields marked with **. Then, click the **Search** button.

In this example, we choose **Person Number** as **00729583**.

Note: In HR Payroll, the person number starts with zeros and must include 8 digits in total.

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name

** Person Number 00729583

** National ID

** Keywords

Include terminated work relationships

* Effective As-of Date 5/25/23

* Required
** At least one is required

Search Reset Save...

- On the **Search Result** section, click the **Employee Name** link.

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name

** Person Number 00729583

** National ID

** Keywords

Include terminated work relationships

* Effective As-of Date 5/25/23


* Required
** At least one is required

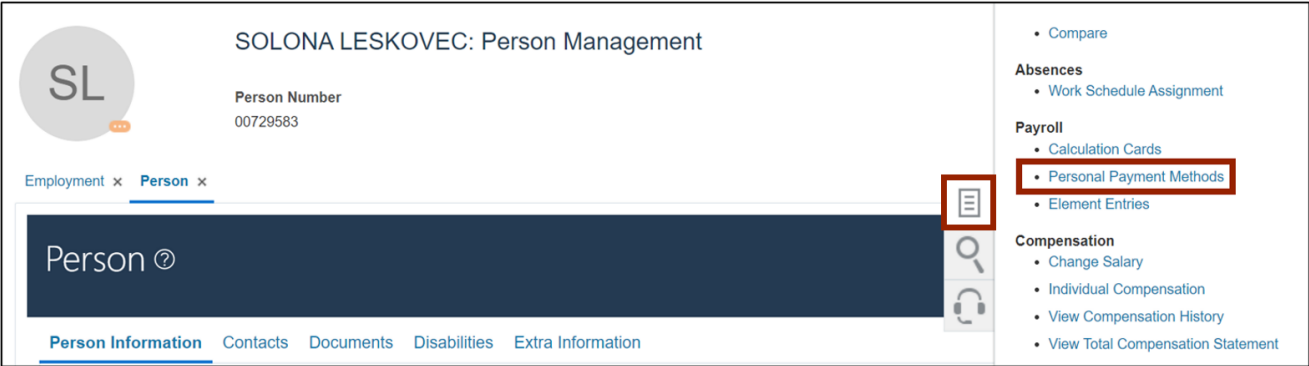
Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status
LESKOVEC, SOLONA	00729583		DOI LEGAL ...		Employee	AGENCY GENERAL C...	Active - Payr...

5. On the **Person Management** page, click the **Tasks** icon [] and under **Payroll**, select **Personal Payment Methods**.



SOLONA LESKOVEC: Person Management


Person Number: 00729583

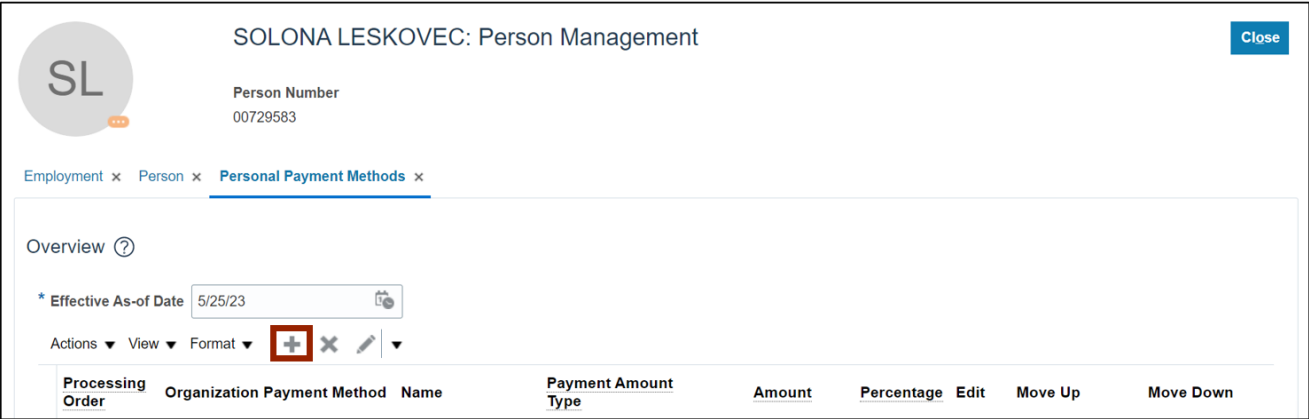
Employment x Person x

Person

- Compare
- Absences
 - Work Schedule Assignment
- Payroll
 - Calculation Cards
 - Personal Payment Methods**
 - Element Entries
- Compensation
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement

Person Information | Contacts | Documents | Disabilities | Extra Information

6. The **Person Management** page opens. Click the **Create** icon [] .



SOLONA LESKOVEC: Person Management

Person Number: 00729583

Employment x Person x Personal Payment Methods x


Overview

* Effective As-of Date: 5/25/23

Actions View Format **+** X Edit

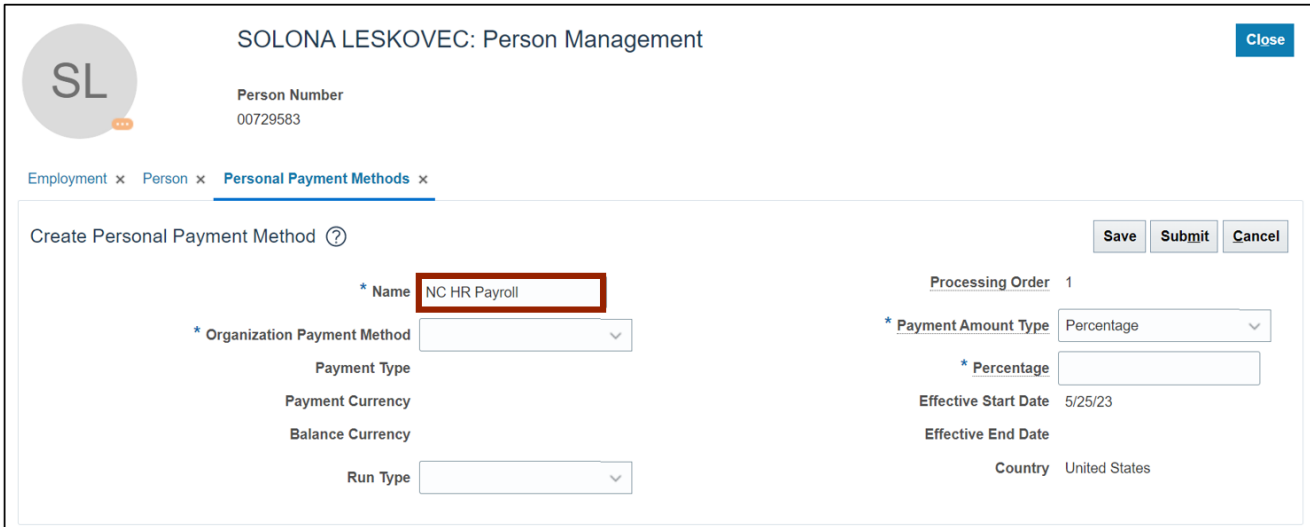
Processing Order	Organization	Payment Method	Name	Payment Amount Type	Amount	Percentage	Edit	Move Up	Move Down
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7. On the **Create Personal Payment Method** section, enter the **Name**.

In this example, we choose  **HR Payroll**.

Note: If you are adding a bank account manually that you do want to get updated from the HR Payroll interface in the future, then the Personal Payment Method name should equal “NC HR Payroll Interface”.

If you are adding a bank account manually that you do not want to get updated from the HR Payroll interface in the future, then the Personal Payment Method name should be something other than “NC HR Payroll Interface” and that account will not get replaced by the HR Payroll interface.



SOLONA LESKOVEC: Person Management Close

Person Number
00729583

Employment x Person x **Personal Payment Methods** x

Create Personal Payment Method Save Submit Cancel

* Name

* Organization Payment Method

Processing Order 1

* Payment Amount Type Percentage

* Percentage

Effective Start Date 5/25/23

Effective End Date

Country United States

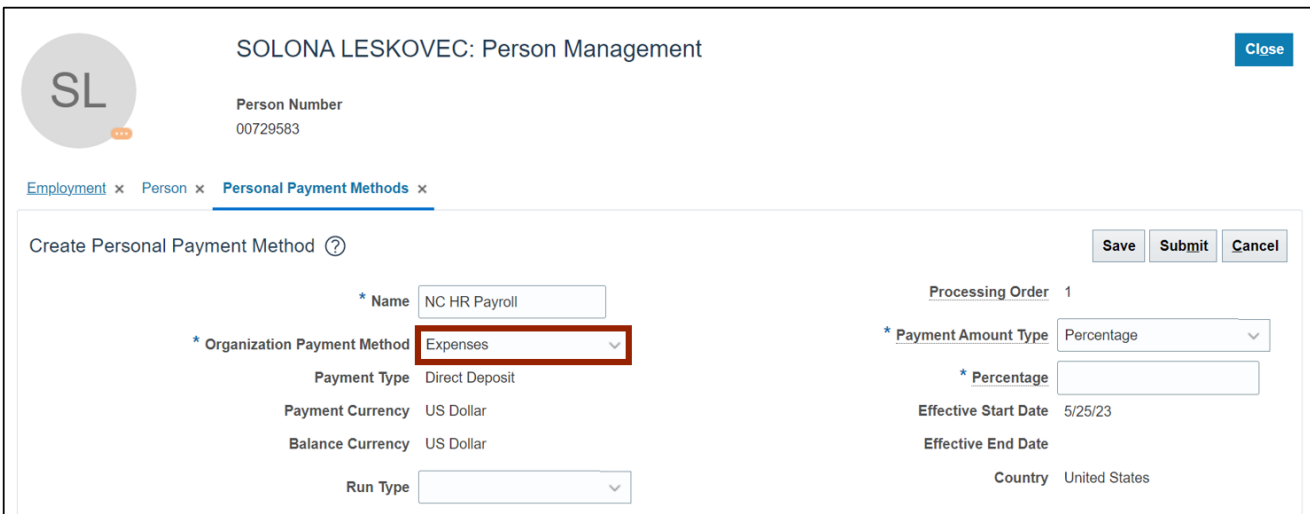
Payment Type

Payment Currency

Balance Currency

Run Type

8. On the **Organization Payment Method** drop-down, select **Expenses**. The **Payment Type**, **Payment Currency**, and **Balance Currency** fields get auto filled once **Expenses** is selected.



SOLONA LESKOVEC: Person Management Close

Person Number
00729583

Employment x Person x **Personal Payment Methods** x

Create Personal Payment Method Save Submit Cancel

* Name

* Organization Payment Method

Processing Order 1

* Payment Amount Type Percentage

* Percentage

Effective Start Date 5/25/23

Effective End Date

Country United States

Payment Type Direct Deposit

Payment Currency US Dollar

Balance Currency US Dollar

Run Type

9. The **Payment Amount Type** defaults to **Percentage**. Enter 100 on the **Percentage** field.

SOLONA LESKOVEC: Person Management Close

Person Number
00729583

Employment x Person x **Personal Payment Methods** x

Create Personal Payment Method Save Submit Cancel

* Name Processing Order 1

* Organization Payment Method * Payment Amount Type

Payment Type Direct Deposit * Percentage

Payment Currency US Dollar Effective Start Date 5/25/23

Balance Currency US Dollar Effective End Date

Run Type Country United States

10. On the **Bank Accounts** section, click the **Create** icon [+].

SOLONA LESKOVEC: Person Management Close

Person Number
00729583

Employment x Person x **Personal Payment Methods** x

Create Personal Payment Method Save Submit Cancel

* Name Processing Order 1

* Organization Payment Method * Payment Amount Type

Payment Type Direct Deposit * Percentage

Payment Currency US Dollar Effective Start Date 5/25/23

Balance Currency US Dollar Effective End Date

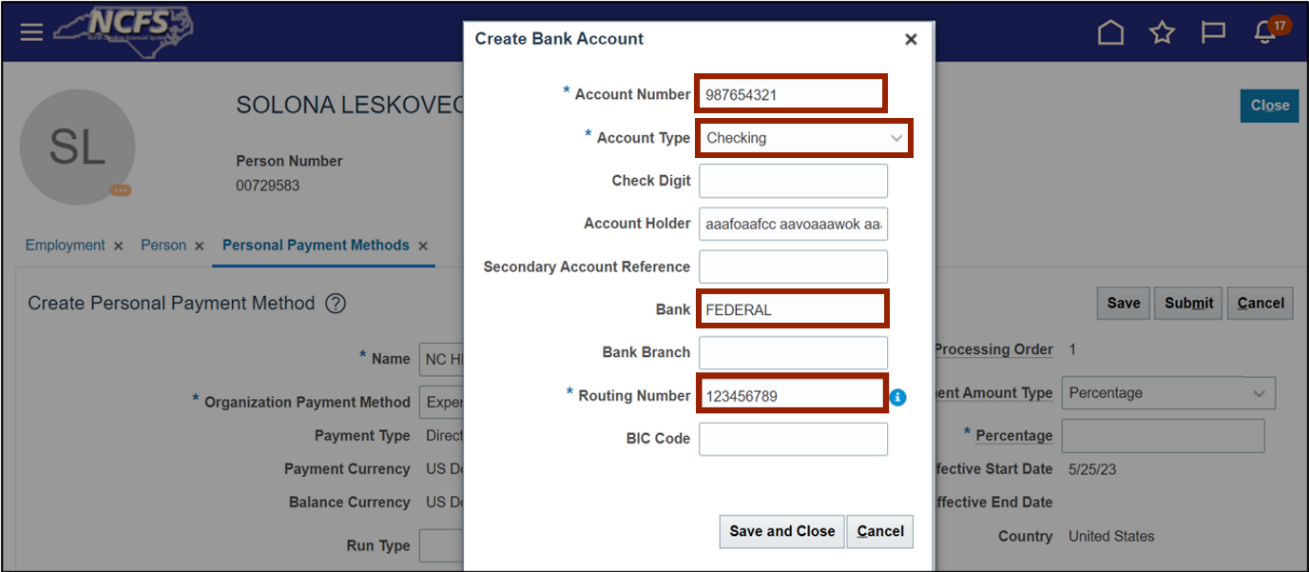
Run Type Country United States

Bank Accounts

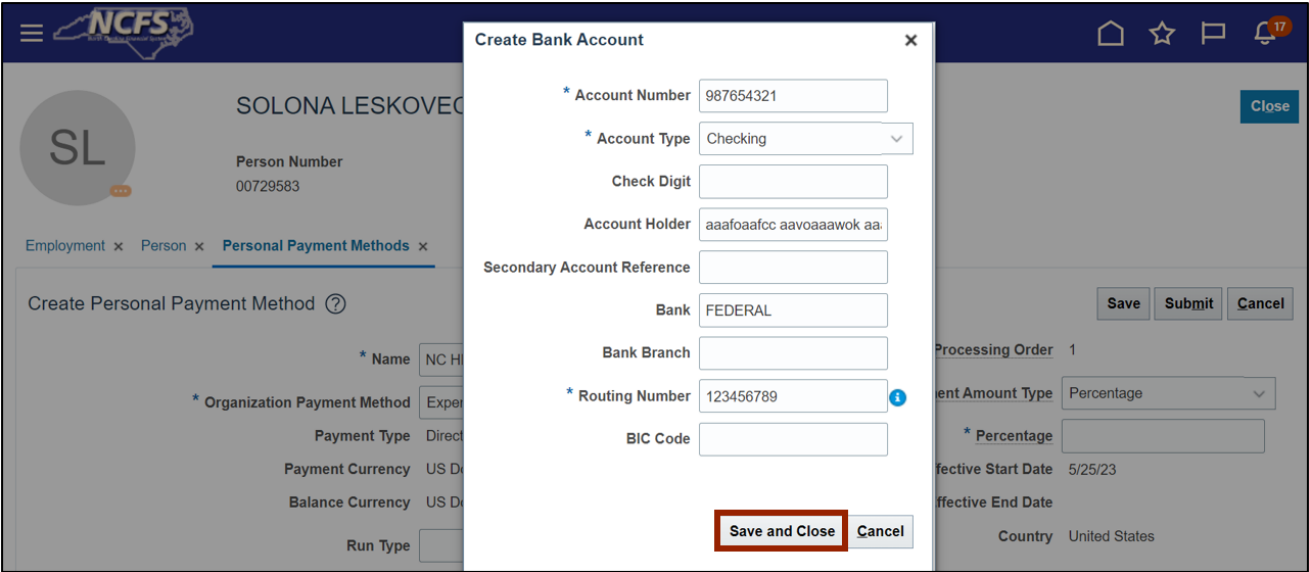
Actions View + Detach

11. The *Create Bank Account* pop-up appears. Select or enter information on fields ***Account Number**, ***Account Type**, ***Bank**, and ***Routing Number**.

- In this example, we choose:
- *Account Number: 987654321**
- *Account Type: Checking**
- *Bank: FEDERAL**
- *Routing Number: 123456789**



12. Click the **Save and Close** button.



13. Click the **Save** button.

Employment x Person x **Personal Payment Methods** x

Create Personal Payment Method ?

Save **Submit** **Cancel**

* Name NC HR Payroll

* Organization Payment Method Expenses

Payment Type Direct Deposit

Payment Currency US Dollar

Balance Currency US Dollar

Run Type

Processing Order 1

* Payment Amount Type Percentage

* Percentage

Effective Start Date 5/25/23

Effective End Date

Country United States

Bank Accounts

Actions View + Detach

Bank Name	Branch	Bank Account Number	Selected Account	Select
FEDERAL		XXXXX4321	<input checked="" type="checkbox"/>	<input type="checkbox"/>

14. Click the **Submit** button.

Employment x Person x **Personal Payment Methods** x

Edit Personal Payment Method ?

History **Save** **Submit** **Cancel**

* Name NC HR Payroll

Organization Payment Method Name Expenses

Payment Type Direct Deposit

Payment Currency US Dollar

Balance Currency US Dollar

Run Type

Processing Order 1

* Payment Amount Type Percentage

* Percentage 100

Effective Start Date 5/25/23

Effective End Date

Country United States

15. The created bank account can be viewed here. Click the **Close** button.

SL SOLONA LESKOVEC: Person Management **Close**

Person Number 00729583

Employment x Person x **Personal Payment Methods** x

Overview ?

* Effective As-of Date 5/25/23

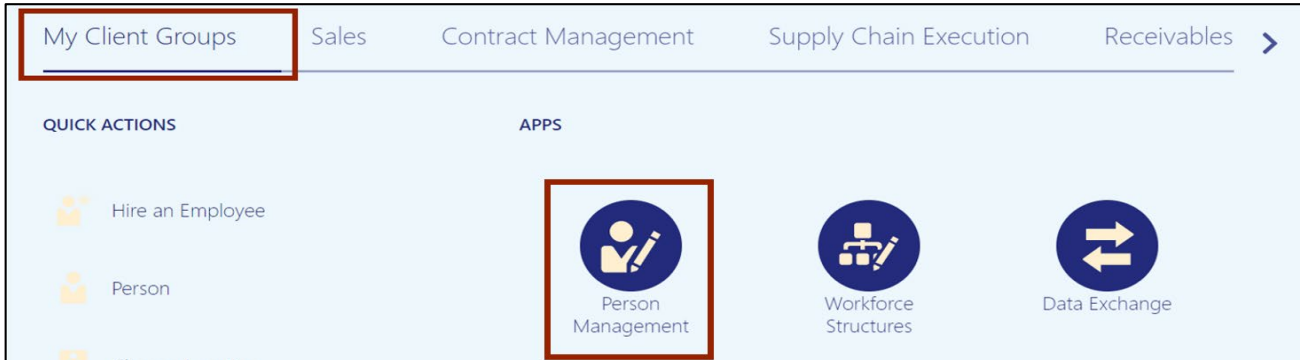
Actions View Format + X Edit

Processing Order	Organization Payment Method	Name	Payment Amount Type	Amount	Percentage	Edit	Move Up	Move Down
1	Expenses	NC HR Payroll	Percentage		100	<input type="text"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>

Edit or End Employee's Bank Account

To edit or end employee's bank account, please follow the steps below:

1. On the **Home** page, click the **My Client Groups** tab and click the **Person Management** app.



2. The **Person Management: Search** page opens. Enter information on at least one of the fields marked with ****** and click the **Submit** button.

In this example, we choose to fill the **Name** field.

Search Person

Person Management: Search

Search Advanced Saved Search All People

**** Name** **** Keywords**

**** Person Number** Include terminated work relationships

**** National ID** *** Effective As-of Date**

Search Reset Save...

* Required
** At least one is required

3. Click the **Employee Name** link.

Search Person

Person Management: Search

Search Advanced Saved Search All People

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status
LESKOVEC, SOLONA	00729583		DOI LEGAL ...		Employee	AGENCY GENERAL C...	Active - Payr...

4. Click the **Tasks** icon and under **Payroll**, select **Personal Payment Methods**.

SOLONA LESKOVEC: Person Management

Person Number: 00729583

- Compare
- Absences
 - Work Schedule Assignment
- Payroll
 - Calculation Cards
 - Personal Payment Methods**
 - Element Entries
- Compensation
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement

Employment x

Employment

Work Relationship ?

5. Click the **Edit** icon [].

SOLONA LESKOVEC: Person Management

Person Number: 00729583


Close

Employment x Personal Payment Methods x

Overview ?

* Effective As-of Date: 5/26/23

Actions View Format + X Edit

Processing Order	Organization	Payment Method	Name	Payment Amount Type	Amount	Percentage	Edit	Move Up	Move Down
1	Expenses		NC HR Payroll	Percentage		100		▲	▼

6. A **Warning** pop-up appears. Click the **Yes** button.

SOLONA LESKOVEC: Person Management

Person Number: 00729583

Close

Employment x Personal Payment Methods x

Warning


You entered an existing effective start date for a record in the object Personal Payment Method, which will correct the existing record. Do you want to continue?

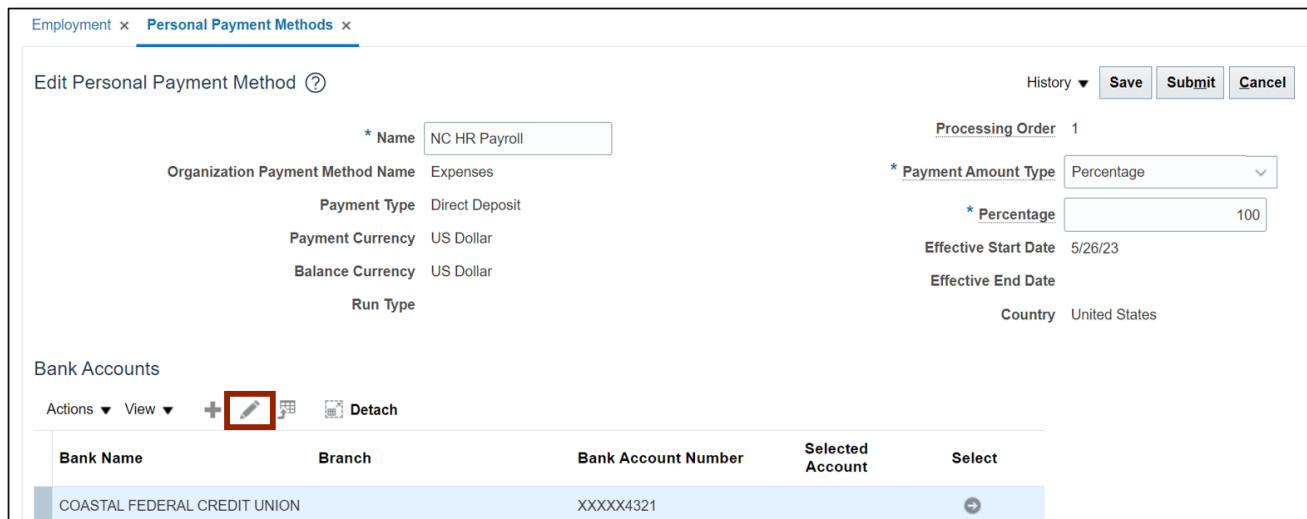
Yes No

Overview ?

* Effective As-of Date: 5/26/23

Actions View Format + X Edit

7. Scroll down to find the **Bank Accounts** section. Click the **Edit** icon [] for the bank account which must be updated.



Employment x Personal Payment Methods x

Edit Personal Payment Method ?

History Save Submit Cancel

* Name NC HR Payroll

Processing Order 1

Organization Payment Method Name Expenses

* Payment Amount Type Percentage

Payment Type Direct Deposit

* Percentage 100

Payment Currency US Dollar

Effective Start Date 5/26/23



Balance Currency US Dollar


Effective End Date

Run Type

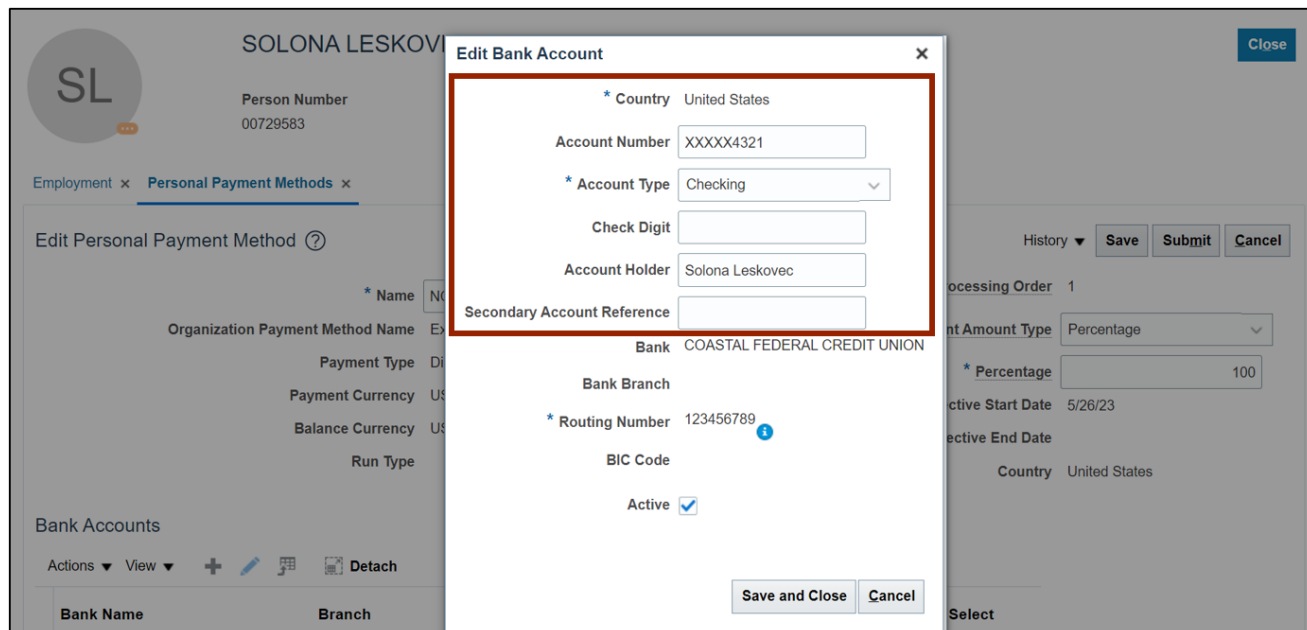
Country United States

Bank Accounts

Actions View +   Detach

Bank Name	Branch	Bank Account Number	Selected Account	Select
COASTAL FEDERAL CREDIT UNION		XXXXX4321		

8. On the *Edit Bank Account* pop-up, enter the required account details to be updated.



SOLONA LESKOVEC

Person Number 00729583

SL

Employment x Personal Payment Methods x

Edit Personal Payment Method ?

* Name NC HR Payroll

Organization Payment Method Name Expenses



Payment Type Direct Deposit

Payment Currency US Dollar

Balance Currency US Dollar

Run Type

Bank Accounts

Actions View +   Detach

Bank Name Branch

History Save Submit Cancel

Processing Order 1

Payment Amount Type Percentage

* Percentage 100

Effective Start Date 5/26/23

Effective End Date

Country United States

Select

Edit Bank Account x

* Country United States

Account Number XXXXX4321

* Account Type Checking

Check Digit

Account Holder Solona Leskovec

Secondary Account Reference

Bank COASTAL FEDERAL CREDIT UNION

Bank Branch

* Routing Number 123456789

BIC Code

Active

Save and Close Cancel

- To end date for the bank account, uncheck the **Active** check box. All previous and unused bank accounts should be end dated by unchecking the **Active** check box.

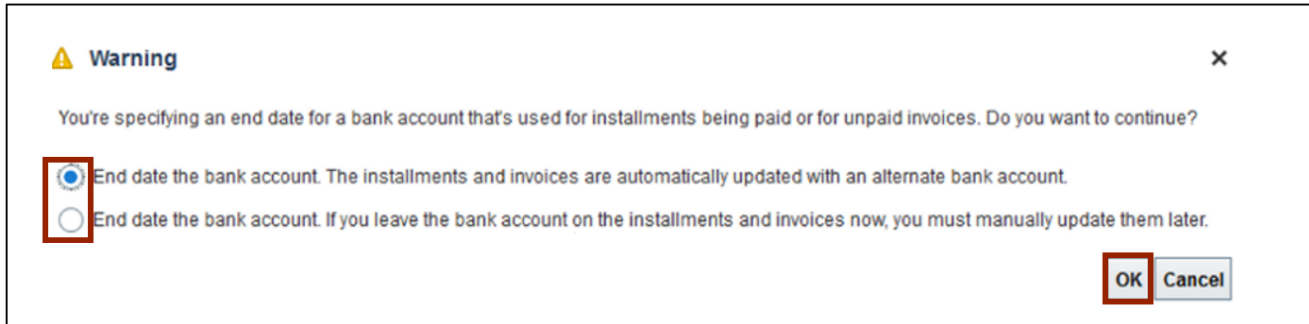
The screenshot shows the 'Edit Bank Account' dialog box for SOLONA LESKOVEC. The dialog contains the following fields: Country (United States), Account Number (XXXXX4321), Account Type (Checking), Check Digit, Account Holder (Solona Leskovec), Secondary Account Reference, Bank (COASTAL FEDERAL CREDIT UNION), Bank Branch, Routing Number (123456789), and BIC Code. The 'Active' checkbox is currently checked and is highlighted with a red box. At the bottom of the dialog are 'Save and Close' and 'Cancel' buttons. The background shows the 'Personal Payment Methods' section of the employee's profile.

- Click the **Save and Close** button.

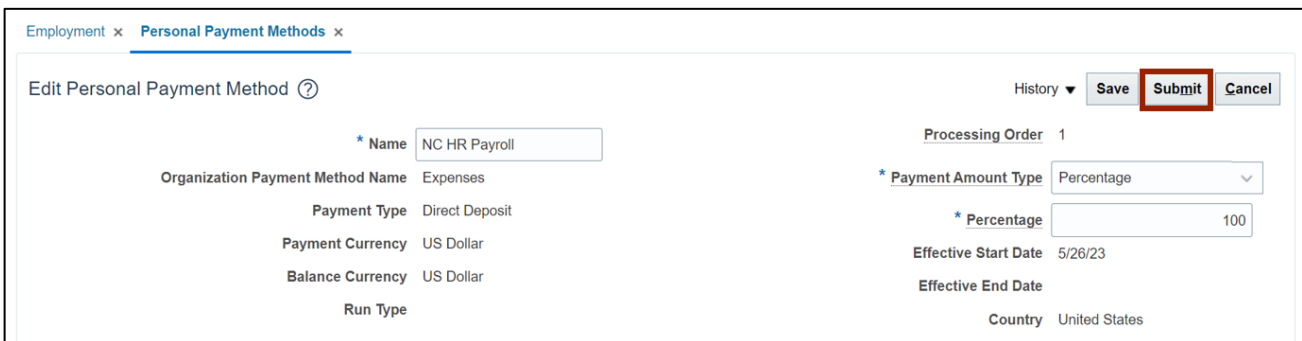
This screenshot is identical to the previous one, showing the 'Edit Bank Account' dialog box. In this step, the 'Active' checkbox is now unchecked. The 'Save and Close' button at the bottom of the dialog is highlighted with a red box, indicating the next action to be taken.

11. A *Warning* pop-up appears. Select the required radio button and click the **OK** button.

Note: If the User would like to update the outstanding expense report invoices for reimbursement, they must create an alternate bank account first (if any) before end dating the old bank account.



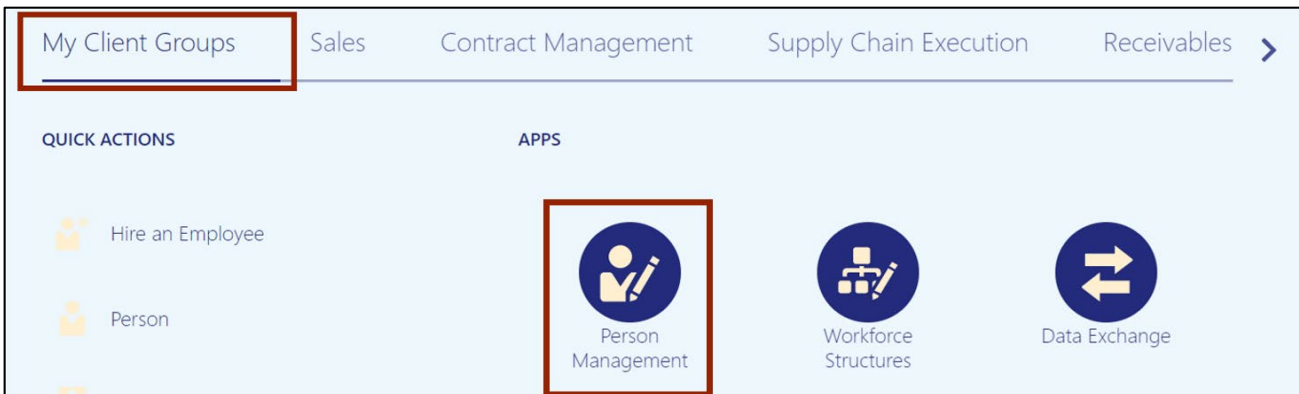
12. Click the **Submit** button to submit the changes.



Manage Employee's Manager

To manage an employee's manager, please follow the steps below:

1. On the **Home** page, click the **My Client Groups** tab and click the **Person Management** app.



- The **Person Management: Search** page opens. Enter information on at least one of the fields marked with ****** and click the **Search** button.

In this example, we choose to fill the **Name** field.

Search Person

Person Management: Search

Search Advanced Saved Search All People

****** Name ****** Keywords

****** Person Number Include terminated work relationships

****** National ID *Effective As-of Date

* Required
** At least one is required

Search Reset Save...

- Click the **Employee Name** link.

Search Person

Person Management: Search

Search Advanced Saved Search All People

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status
LESKOVEC, SOLONA	00729583		DOI LEGAL ...		Employee	AGENCY GENERAL C...	Active - Payr...

- Click the **Edit** drop-down choice list and select **Correct**.

Employment

Work Relationship

Legal Employer NC DEPARTMENT OF INSURANCE Country United States

Worker Type Employee

Hire Date 8/18/97

Assignment: AGENCY GENERAL COUNSEL I

Action Assignment Change Effective Start Date 1/9/23 (1 of 1)

Action Reason Reorganization Effective End Date

Edit View History

- Update
- Correct**
- Delete Record

5. On the *Action* drop-down choice list, select **Manager Change** and click the **OK** button.

The screenshot shows the 'Employment' form with a modal window titled 'Correct Employment'. The modal contains the following fields:

- Action:** A dropdown menu with 'Manager Change' selected.
- Action Reason:** A dropdown menu.
- Buttons:** 'OK' and 'Cancel' buttons.

The background form shows details for a worker with 'Legal Employer' as 'NC DEPARTMENT OF INSURANCE', 'Worker Type' as 'Employee', and 'Hire Date' as '8/18/97'. The 'Assignment' is for 'AGENCY GENERAL CO'. The 'Action' is 'Assignment Change' and the 'Action Reason' is 'Reorganization'.

6. Scroll down to find the **Manager Details** section and click the **Create** icon [+].

The screenshot shows the 'Manager Details' section of the form. The section is titled 'Manager Details' with a '+' icon next to it. Below the title are two dropdown menus:

- *Name:** A dropdown menu.
- *Type:** A dropdown menu with a blue 'X' icon to its right.

Below these fields is the text 'Assignment EIT Information EFF: Assignment Extra Information'. Further down, there is a section for 'Probation and Notice Periods' with fields for 'Probation Period', 'Notice Period', and 'Probation End Date' (with a date picker icon).

7. Click the *Name* drop-down choice list, and click the **Search** link.

The screenshot shows the 'Manager Details' section with the 'Name' dropdown menu highlighted. A search bar is visible below the dropdown, with the text 'Search...' inside it. The search bar is highlighted with a red box.

8. Enter the required manager details on either of the parameters (**Name, Department, Job, Email**) and click the **Search** button.

In this example, we choose **Name**.

Search and Select: Name

Advanced

** At least one is required

** Name

** Department

** Job

** Email

Assignment Status

Search Reset

Name	Assignment Number	Department	Job
------	-------------------	------------	-----

OK Cancel

9. Select the manager record and click the **OK** button.

Search and Select: Name

Basic

Name	Assignment Number	Department	Job
DOMINIC, ABIOLA	E00943389	DOI ADMINISTRATION	DEPUTY SECRETARY

OK Cancel

10. On the *Type* drop-down choice list, select **Line Manager**.

Manager Details +

*Name DOMINIC, ABIOLA E00943389 Active - Payroll Eligible *Type Line manager X

Assignment EIT Information EFF: Assignment Extra Information

Probation and Notice Periods

Probation Period [] [] Notice Period [] []

Probation End Date m/d/yy [] [] []

11. Scroll up and click the **Save** button.

SOLONA LESKOVEC: Person Management Close

Person Number 00729583

Employment x

Edit Employment: Manager Change Review Save Submit Cancel

Work Relationship ?

Legal Employer NC DEPARTMENT OF INSURANCE Country United States

Worker Type Employee

Hire Date 8/18/97

12. The *Confirmation* pop-up appears. Click the **OK** button.

SOLONA LESKOVEC: Person Management Close

Person Number 00729583

Employment x

Edit Employment: Manager Change Confirmation X

Your changes were saved. OK

Save Submit Cancel

Work Relationship ?

Legal Employer NC DEPARTMENT OF INSURANCE Country United States

Worker Type Employee

Hire Date 8/18/97

13. Click the **Review** button.

SOLONA LESKOVEC: Person Management Close

Person Number: 00729583

Employment x

Edit Employment: Manager Change Review Save Submit Cancel

Work Relationship ⓘ

Legal Employer: NC DEPARTMENT OF INSURANCE Country: United States

Worker Type: Employee

Hire Date: 8/18/97

14. Scroll down to the **Manager Details** section and review the updates made. A manager has been added under the **Proposed Value** section.

Assignment: AGENCY GENERAL COUNSEL I

Assignment Details

Job Details

Attribute	Current Value	Proposed Value	
Manager Details			
Proposed Value			
Name	Assignment Number	Assignment Status	Type
DOMINIC, ABIOLA	E00943389	Active - Payroll Eligible	Line manager

15. Scroll up and click the **Submit** button to submit the changes made.

SOLONA LESKOVEC: Person Management Close

Person Number: 00729583

Employment x

Edit Employment... Printable Page Back Review Save Submit Cancel

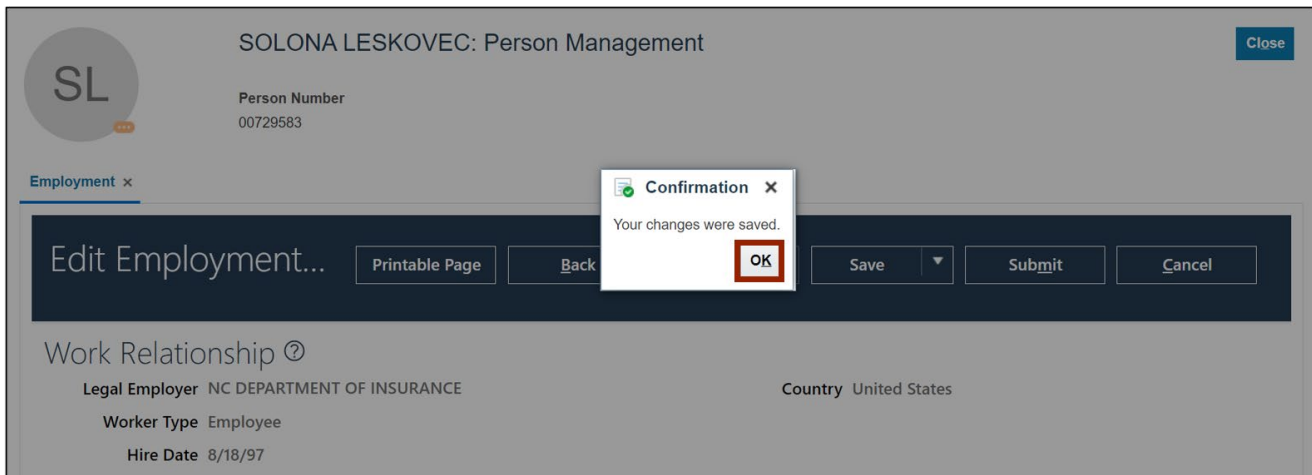
Work Relationship ⓘ

Legal Employer: NC DEPARTMENT OF INSURANCE Country: United States

Worker Type: Employee

Hire Date: 8/18/97

16. The *Confirmation* pop-up appears. Click the **OK** button.



Wrap-Up

Create and manage employee information by setting up employee bank accounts, edit or end employee bank accounts, and manage employee managers using the steps above.

Additional Resources

Web-Based Training (WBT)

- EX103: Employee Expense Information Management