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.

3. 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.

4. On the *Search Result* section, click the **Employee Name** link.
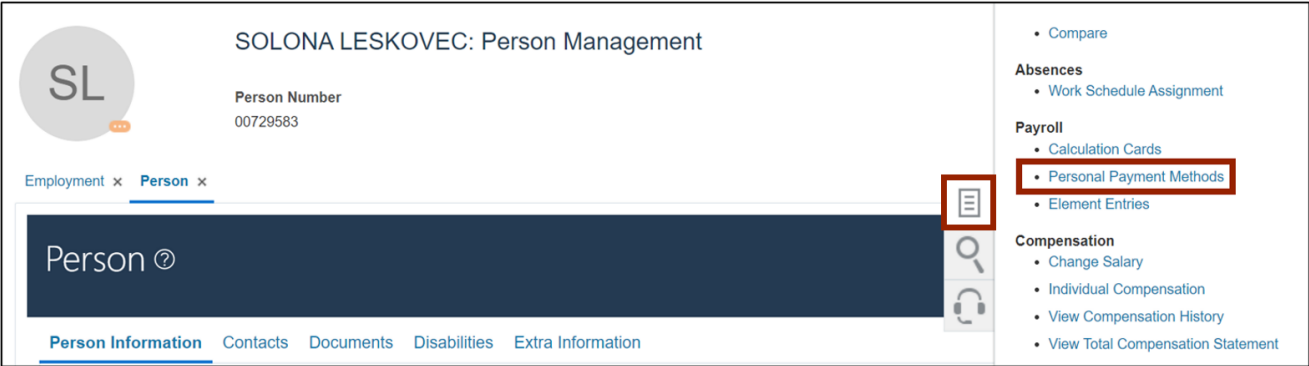
5. On the **Person Management** page, click the **Tasks** icon [▤] and under **Payroll**, select **Personal Payment Methods.**
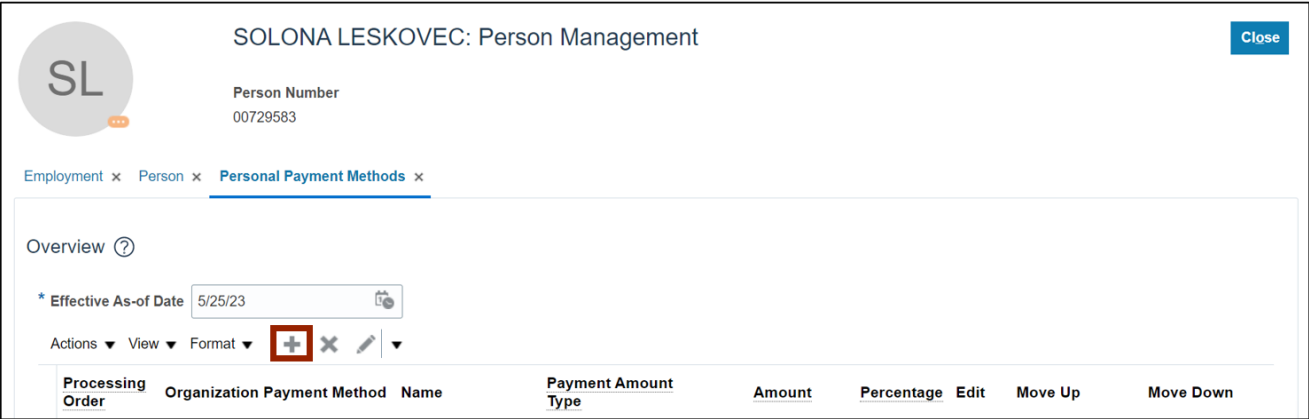
6. The **Person Management** page opens. Click the **Create** icon [➕] .

7. On the *Create Personal Payment Method* section, enter the *Name*.

   In this example, we choose NC HR Payroll.

   Note**:** If you are adding a bank account manually that you <u>do</u> 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 <u>do not</u> 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.
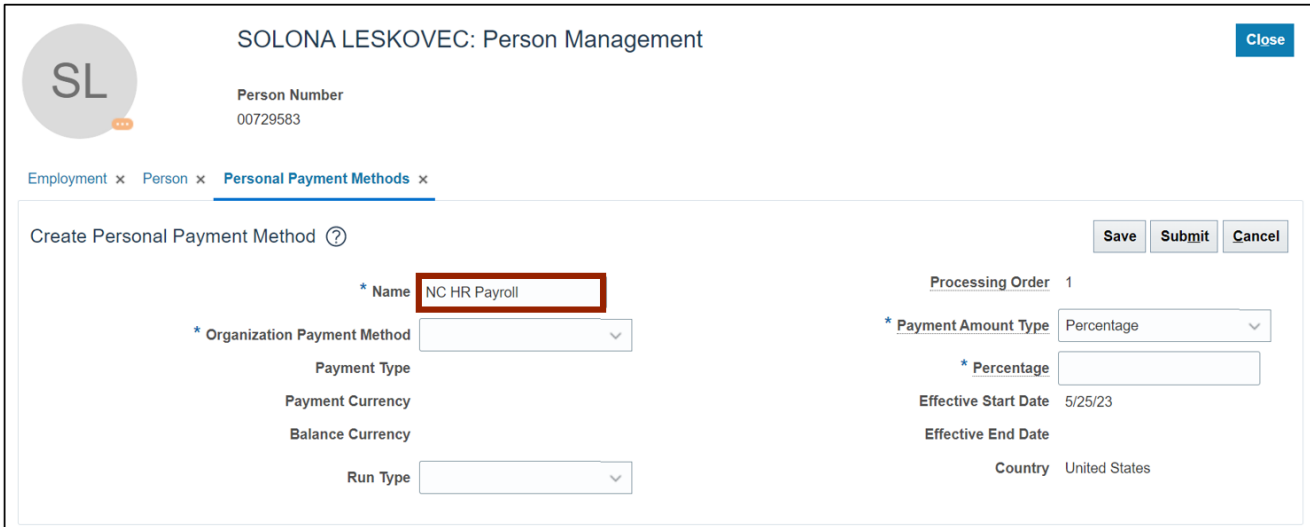
8. On the *Organization Payment Method* drop-down, select **Expenses**. The *Payment Type, Payment Currency,* and *Balance Currency* fields get auto filled once **Expenses** is selected.
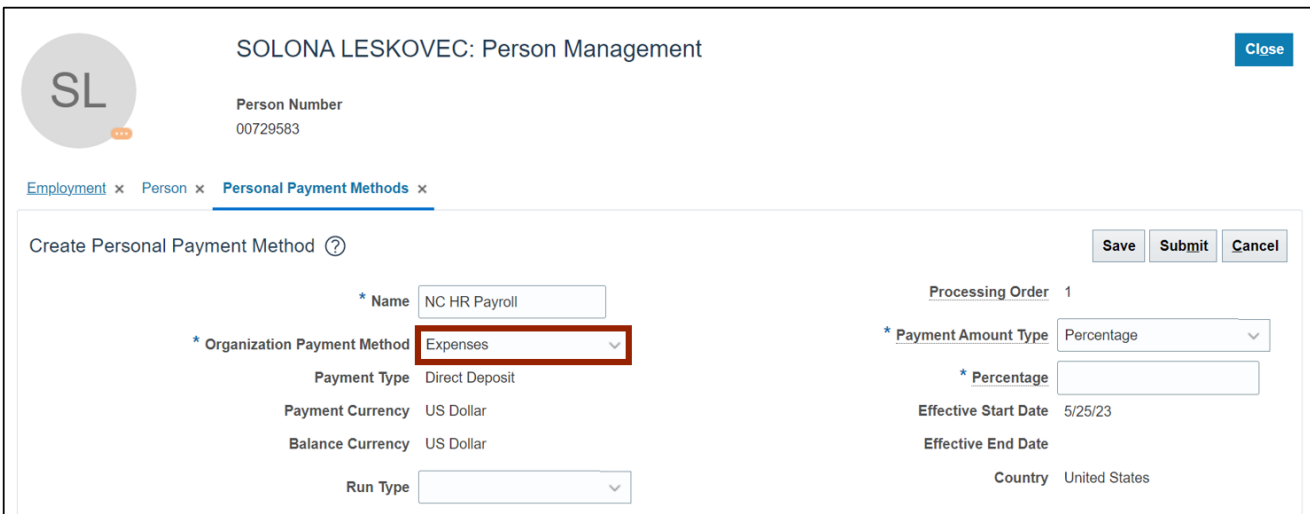
9. The *Payment Amount Type* defaults to **Percentage.** Enter 100 on the *Percentage* field.

10. On the *Bank Accounts* section, click the **Create** icon [➕].
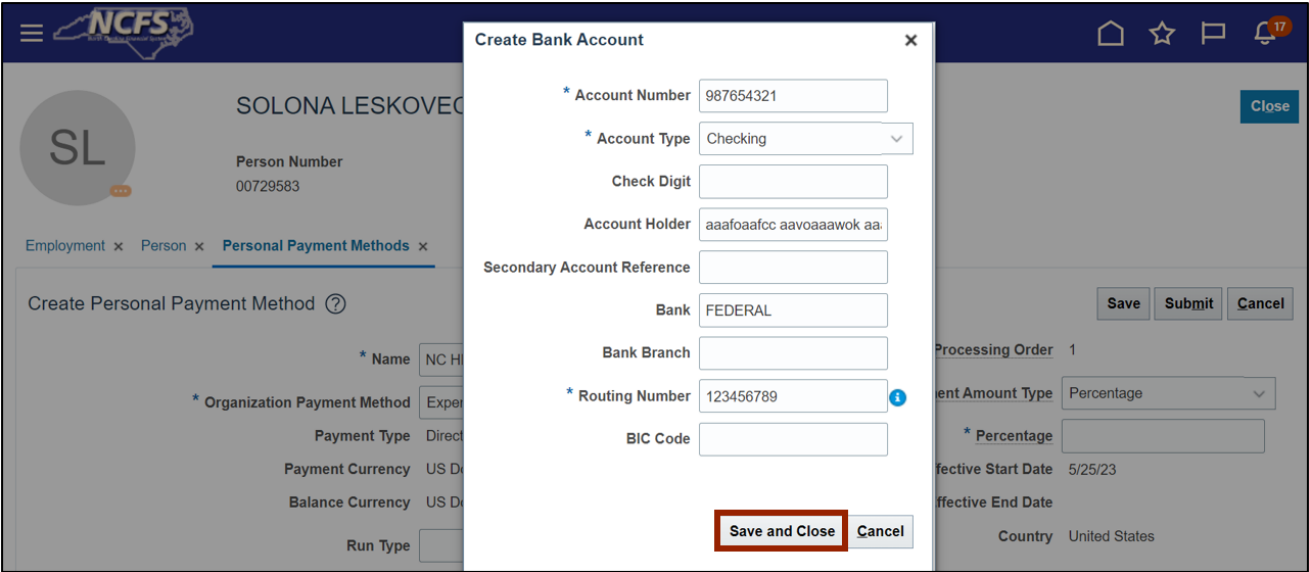
11. The *Create Bank Account* pop-up appears. Select or enter information on fields ***Account Number, *Account Type, *Bank,*** and ***Routing Number***.

In this example, we choose:
Account Number: **987654321**
Account Type: **Checking**
Bank: **FEDERAL**
Routing Number: **123456789**
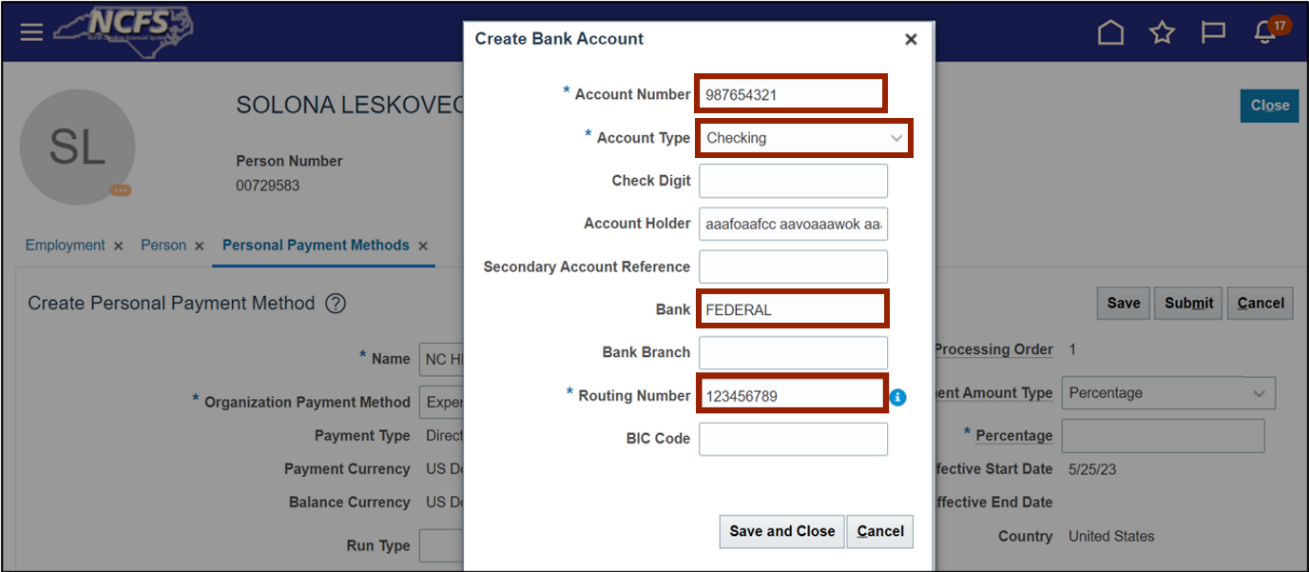
12. Click the **Save and Close** button.

13. Click the **Save** button.

14. Click the **Submit** button.

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

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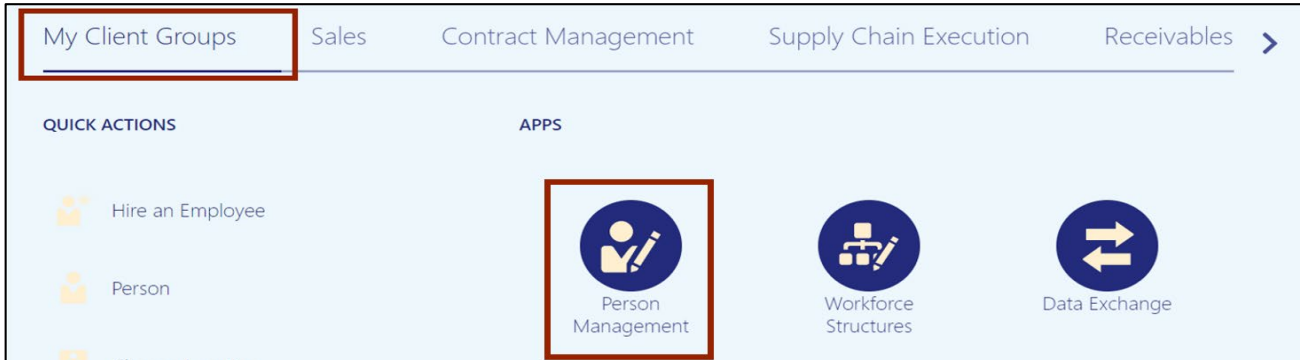
2. The **Person Management: Search** page opens. Enter information on at least one of the fields marked with ** and click the **Submit** button.

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

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

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

5. Click the **Edit** icon [✎] .

6. A *Warning* pop-up appears. Click the **Yes** button.
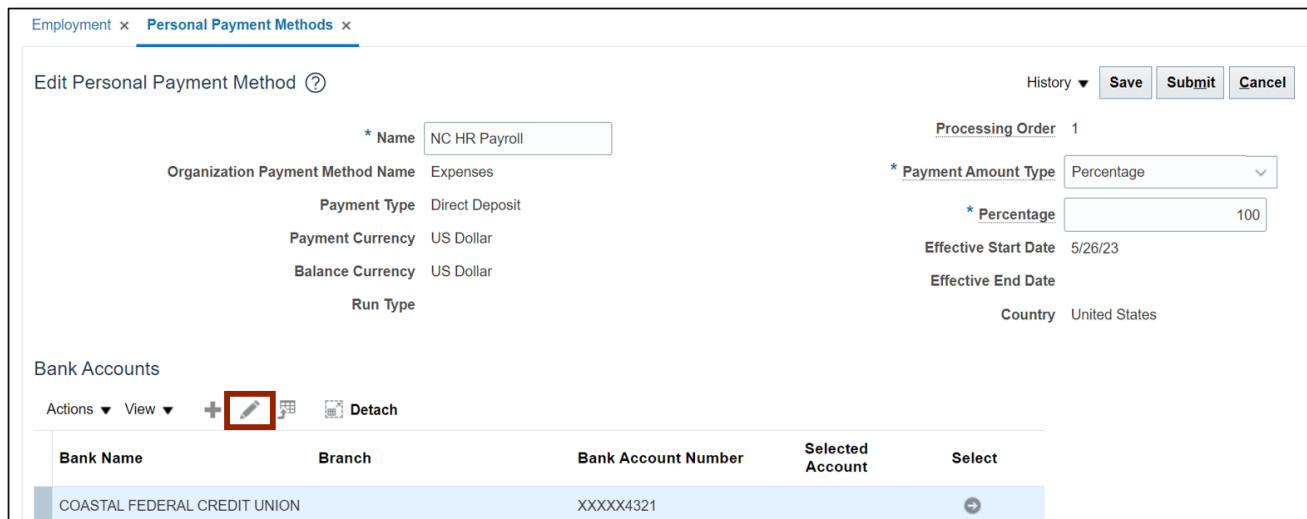
7. Scroll down to find the *Bank Accounts* section. Click the **Edit** icon [✏] for the bank account which must be updated.

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

9. 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.
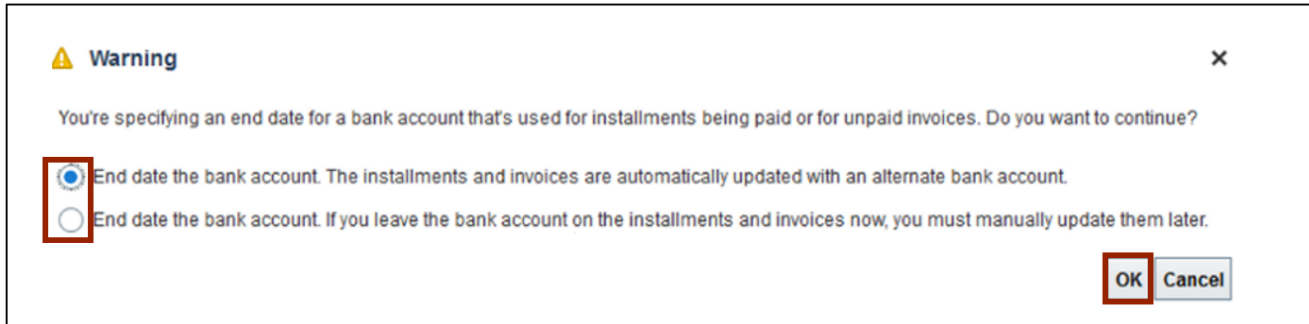

10. Click the **Save and Close** button.

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.
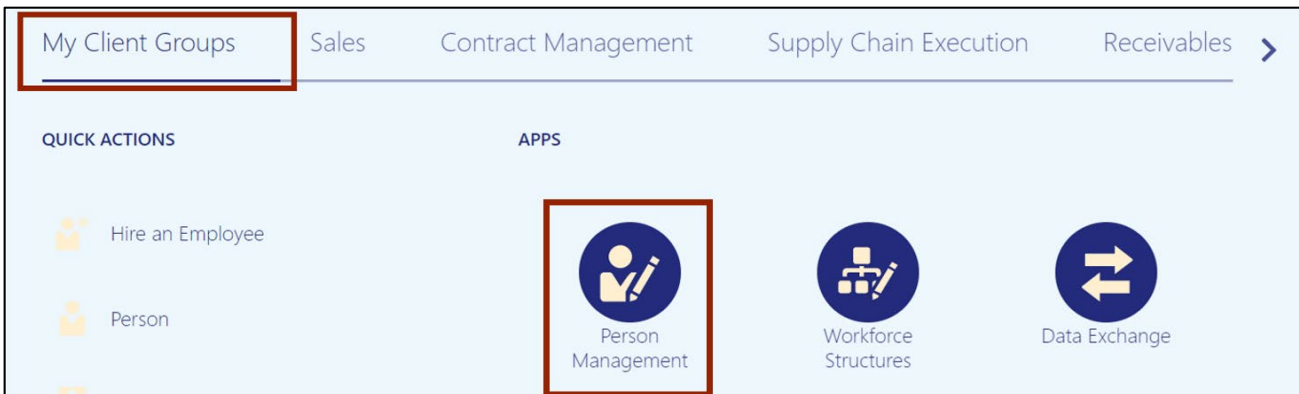

12. Click the **Submit** button to submit the changes.
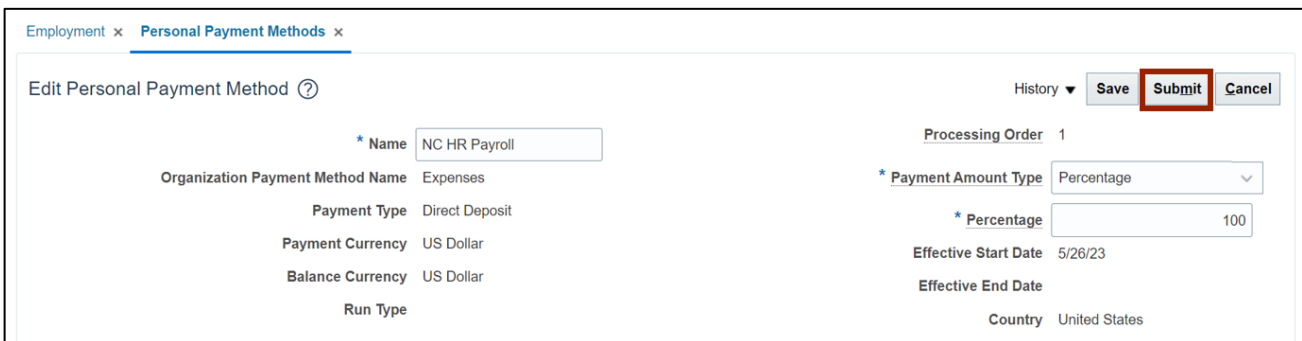
Manage Employee's Manager

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.

2. 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.

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

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

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

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

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

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.*

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

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

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

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

13. Click the **Review** button.

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

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

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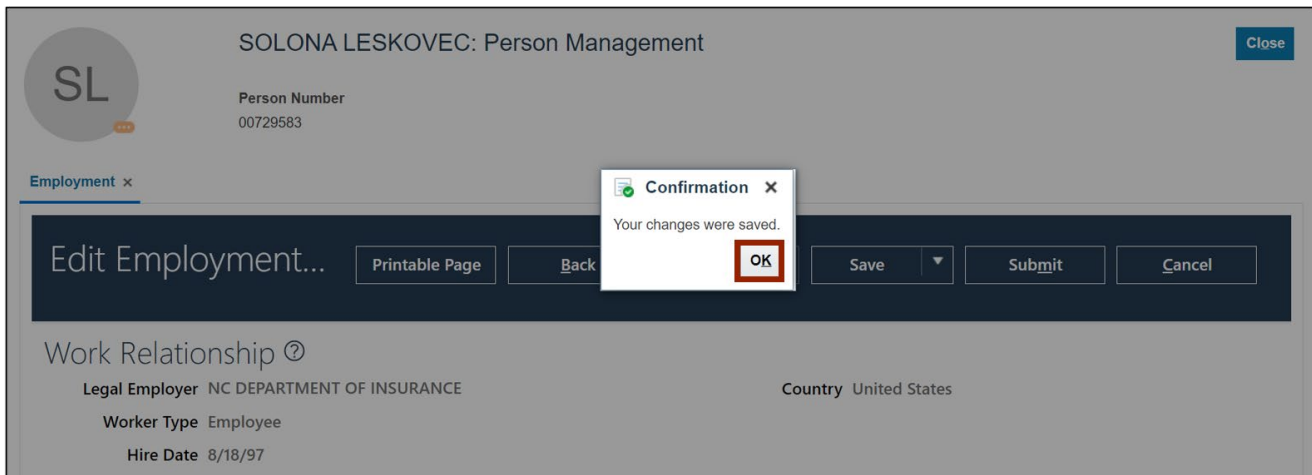
Wrap-Up

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