



Time and Labor (T&L)

HR CSR

View Employee HR Record History

R12 Work Instructions



Document Control

Change Record

Date	Author	Version	Change Reference
30-April-14	Robin Hardy	1.1	R12 Update and step changes
05-Jan-2017	Kim Gragg	1.2	DoDEA Updates

Reviewers

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Distribution

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1	HR CSR View Employee HR Record History	DEPS

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Business Process Description

The DAI HR Professional or Customer Service Representative (CSR) has access to review employee's record information stored in DAI for validation purposes. When reviewing the employee record, the display will show the most recent record with any historical changes. The record can be displayed in a previous status based on the date of the change to the employee record by using the Date Track History icon.

The DCPDS Interface automates creation and updates to employee records in DAI. The Interface receives human resource (HR) transaction records from DCPDS (Defense Civilian Personnel Data System) and uses the data to create and update HR records in DAI. In addition, changes and updates to the employee record can be made directly into the DAI system.

This procedure document shows how to access and view an employee's record(s) in DAI. This instruction is **to view only** the employee record data. See the Update Employee Record work instructions in order to make an actual change to the employee record.

Trigger

- An employee record exists in DAI which the HR CSR needs to view.

Prerequisites

- DAI Navigation

Responsibilities

- HR CSR – DoDEA

Menu Path

- People → Enter and Maintain

Training Exercises:

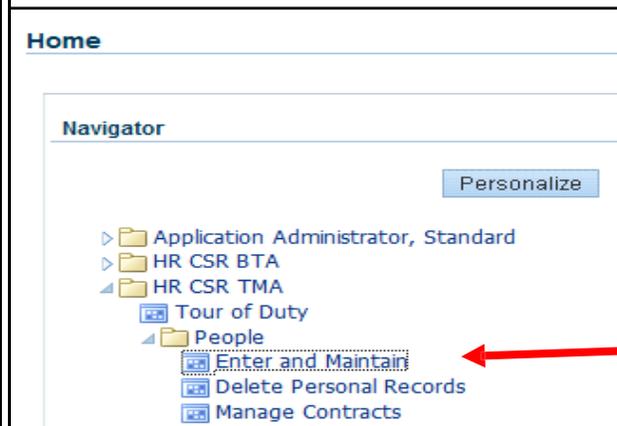
- Review an Employee's Record History

View Employee HR Record History

1. Start the task using the responsibility and menu path to open the **People** form:

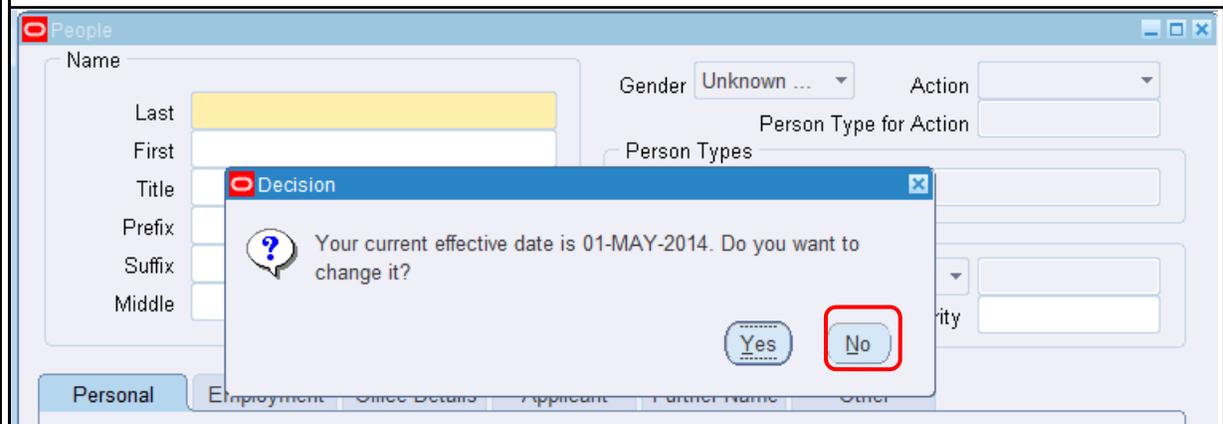
- **Responsibility:** HR CSR – Agency
- **Menu Path:** People → Enter and Maintain

DAI E-Business Suite – Navigation



People

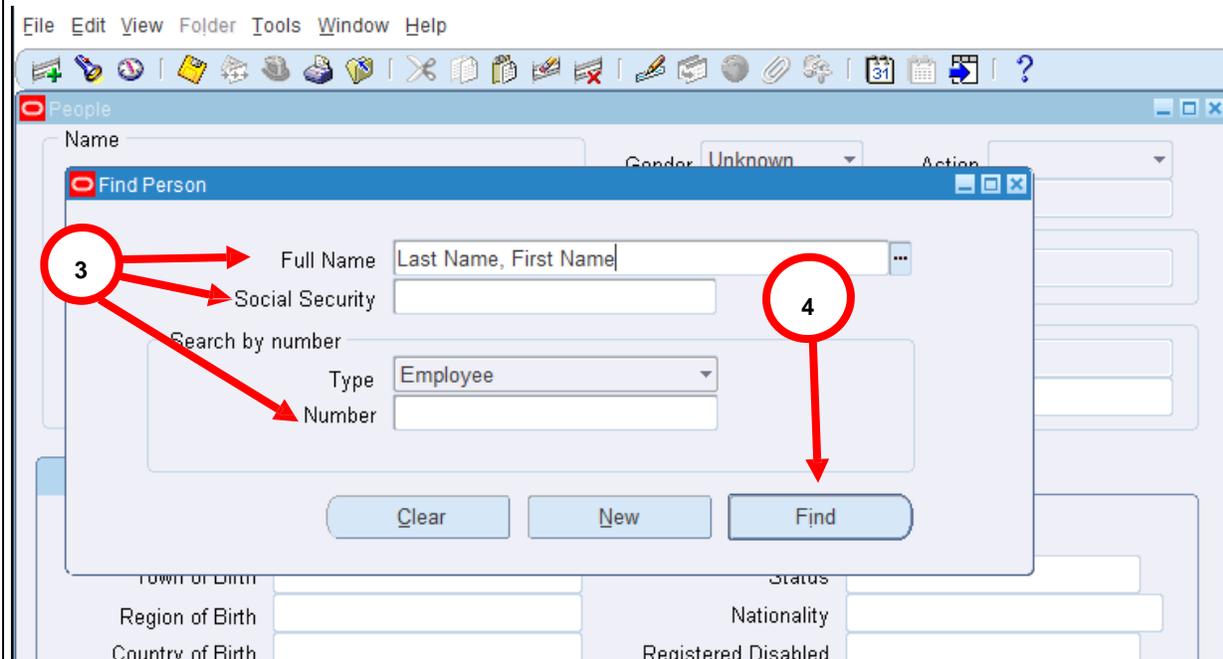
People – Decision



2. **Decision popup box:** Click the  button to keep the effective date the same. Selecting the **No** button will default the employee record to the current status of information,

Note: This instruction is **to view only** the employee record data. See the Update Employee Record work instructions in order to make an actual change to the employee record.

People – Find Person

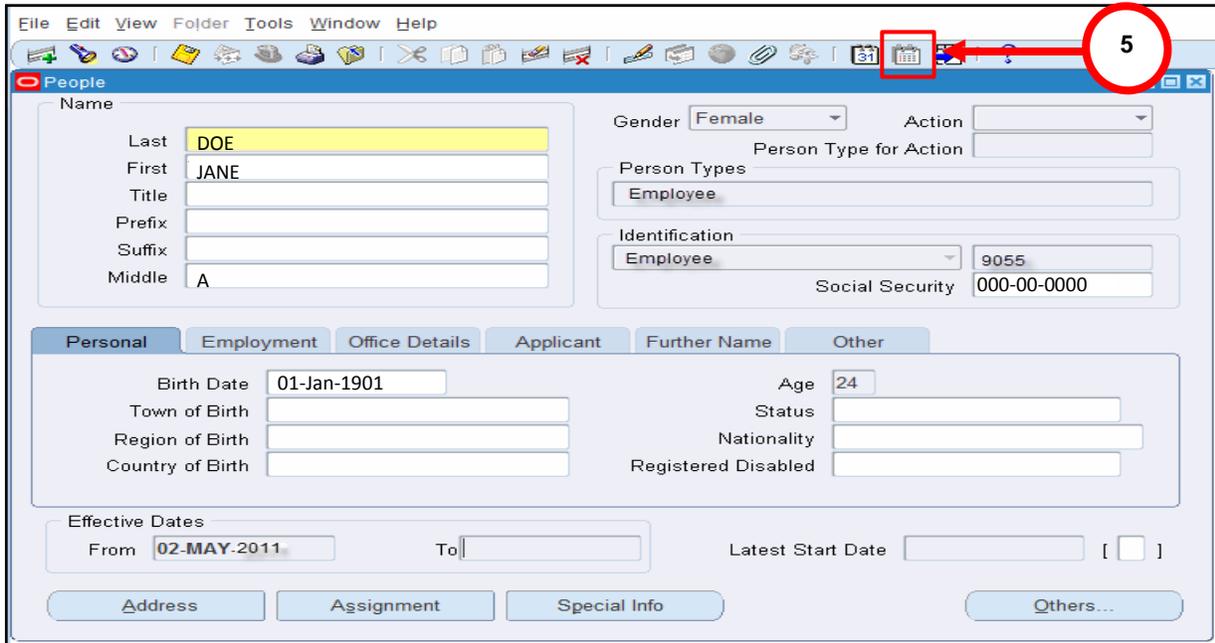


- 3. Find Person** –Enter an employee’s name in the **Full Name** field on the **Find Person** form using the format: **Last Name, First Name**, or enter a **Social Security Number** or **Employee Number** for primary search options.

Use wildcards and partial name searches (for example, Jacks %) to limit results. Remember entering multiple field search criteria, may limit the records displayed in the search.

- 4.** Click the **Find** button to activate the search.

People – Date Track History

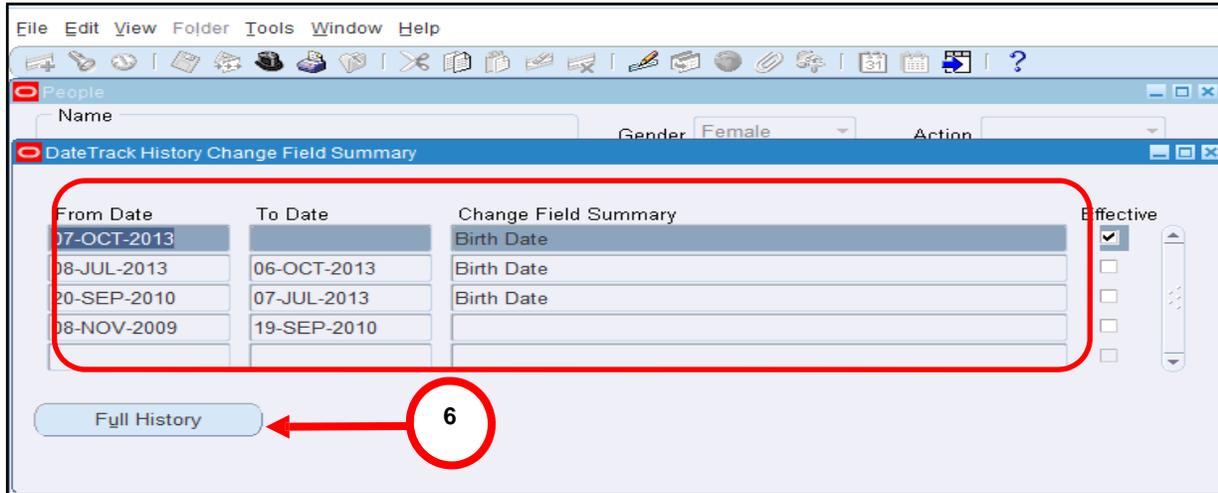


The screenshot shows a web-based form titled "People" with a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar. The form is divided into several sections: "Name" (Last: DOE, First: JANE, Title, Prefix, Suffix, Middle: A), "Gender" (Female), "Action", "Person Types" (Employee), "Identification" (Employee, 9055, Social Security: 000-00-0000), "Personal" (Birth Date: 01-Jan-1901, Age: 24, Town of Birth, Region of Birth, Country of Birth, Status, Nationality, Registered Disabled), "Effective Dates" (From: 02-MAY-2011, To, Latest Start Date), and "Address", "Assignment", "Special Info", "Others..." buttons. A red circle with the number "5" is placed over the "Date Track History" icon in the toolbar, with a red arrow pointing to it.

5. Click the **Date Track History**  icon on the **People** Form to view the current history for the employee. The **Date Track History Change Field Summary** form displays.

Note: The **Alter Effective Date** icon does not apply to viewing employee records. Use the **Date Track History** icon to **change** the date view timeframe displayed for the employee's record.

People – Date Track History Change Field Summary



6. The **Date Track History Change Field Summary** Form displays a high level summary of updated fields for this employee.

In the above display, the first row (From Date: 07-OCT-2013) is the latest or current employee record. The second row (From Date 08-JUL-2013 and To Date: 06-OCT-2013) is the previous version of that employee's record. In the **Change Field Summary** column, the verbiage **Birth Date**, describes the change made to the employee record. The actual date change can be viewed on the **Date Track History of Person** form.

Click the **Full History** button to view the employee's history on the **Date Track History of Person** Form for the activity pertaining to the date row selected.



People - Date Track History of Person – Date Track History Change Field - Full History

The screenshot shows three overlapping windows in the People application:

- People**: Search criteria include Name (Last: SMITH), Gender (Female), and Action.
- DateTrack History of Person**: A table with columns: From Date, To Date, Birth Date, Date Last Verified, Disabled, Email, and E. The first row is highlighted: 07-OCT-2013, 06-NOV-1996.
- DateTrack History Change Field Summary**: A table with columns: From Date, To Date, Change Field Summary, and Effective. The first row is highlighted: 07-OCT-2013, Birth Date, and checked Effective.

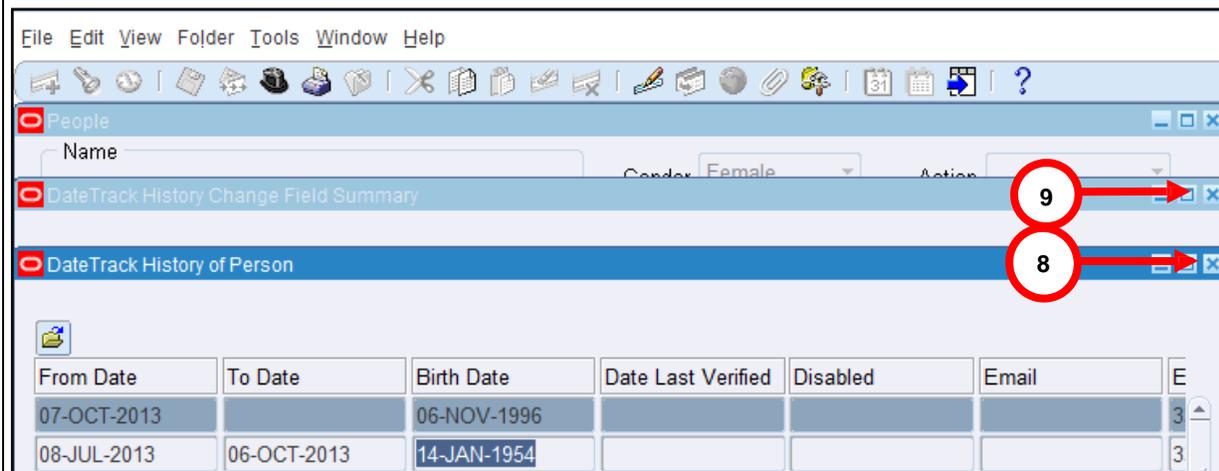
A red circle with the number 7 and an arrow points to the "Full History" button at the bottom of the DateTrack History Change Field Summary window.

7. The employee history information pertaining to the first line (07-OCT-2013) describes the employee's birth date changed from 14-JAN-1954 to 06-NOV-1996 on the pay period starting 07-OCT-2013.

The **Date Track History of Person** form contains the following columns of employee detail:

Column Name	Column Name	Column Name
From Date	Honors	Office Number
To Date	Internal Location	On Military Service
Birth Date	Known As	Previous Last Name
Data Last Verified	Last Name	Prefix
Disabled	Last Updated By	2 nd Passport Exist
Email	Last Updated Date	Gender
Employee Number	Mailstop	Social Security Number
First Name	Mail Destination	Student Status
FTE Capacity	Marital Status	Suffix
Full Name	Middle Name	Title
Hold Applicant Date Until	Nationality	Work Schedule
		Effective (check box)

Date Track History of Person



8. Click the X  in the upper right active window to close the **Date Track History of Person** form.
9. Click the X  in the upper right active window to close the **Date Track History Change Field Summary** form.



Address

People - Address

People

Name
Last **DOE**
First JANE
Title
Prefix
Suffix
Middle A

Gender **Female** Action
Person Type for Action
Person Types
Employee
Identification
Employee 3345
Social Security 000-00-0000

Personal Employment Office Details Applicant Further Name Other

Birth Date 01-JAN-1901 Age 17
of Birth
of Birth
Country of Birth
Status
Nationality
Registered Disabled

Effective Dates
From 07-OCT-2013 To
Latest Start Date 08-NOV-2009 [TV]

Address Assignment Special Info Others...

10. Click the **Address**  button to view the employee address.

People – Address

The screenshot shows the 'People' application interface. The 'Address' form is open, displaying the following fields: Style (United States (International)), Address (United States (International). 123456 Main Street. 123456 Main Street.. KENOSHA.. WI. 5314), Details (Type, Date From: 08-JUL-2013, Date To, Primary checkbox checked), and Town of Birth. A red circle labeled '11' highlights the 'Address' field and its details.

11. The **Address** form displays the form's **Style, Address,(Primary)** and the **Date From** and **To** fields.

Select in the **Address** field to display the **Personal Address Information** descriptive flex field (DFF) box.

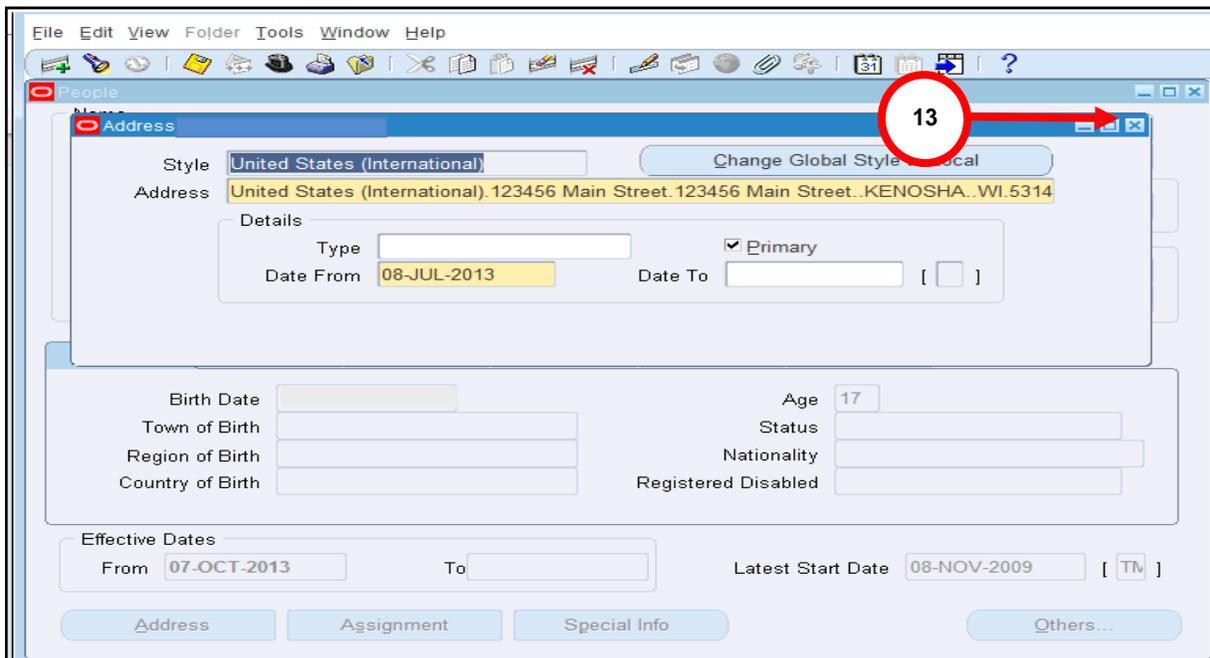
Note: The **Change Global Style to Local** button should not be used to change the display format. Currently in DAI, only the **Style – United States (International)** is activated for usage.

Personal Address Information

The screenshot shows the 'Personal Address Information' form. The fields are: Address Style (United States (International)), Address Line1 (123456 Main Street), Address Line2 (123456 Main Street), Address Line3, City (KENOSHA), County, State (WI Wisconsin), Zip Code (53142-7832), Country (United States), Telephone (999-99-9999), and Telephone2 (999-99-9999). A red circle labeled '12' highlights the 'Personal Address Information' field.

12. Click the X  in the upper right active window to close the **Personal Address Information (DFF)** form

Address



The screenshot shows a software interface with a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar. The main window is titled 'People' and contains a sub-window titled 'Address'. The 'Address' window has a title bar with a close button (X icon) circled in red and labeled '13'. The form fields are as follows:

Style	United States (International)	Change Global Style	Local
Address	United States (International).123456 Main Street.123456 Main Street..KENOSHA..WI.5314		
Details			
Type		<input checked="" type="checkbox"/> Primary	
Date From	08-JUL-2013	Date To	[]
Birth Date		Age	17
Town of Birth		Status	
Region of Birth		Nationality	
Country of Birth		Registered Disabled	
Effective Dates			
From	07-OCT-2013	To	
		Latest Start Date	08-NOV-2009 [TM]

Buttons at the bottom: Address, Assignment, Special Info, Others...

13. Click the X  in the upper right active window to close the **Address** form



Assignment

People - Assignment

People

Name

Last **DOE**
First JANE
Title
Prefix
Suffix
Middle A

Gender **Female** Action
Person Type for Action
Person Types **Employee**
Identification **Employee** 3345
Social Security 000-00-0000

Personal Employment Office Details Applicant Further Name Other

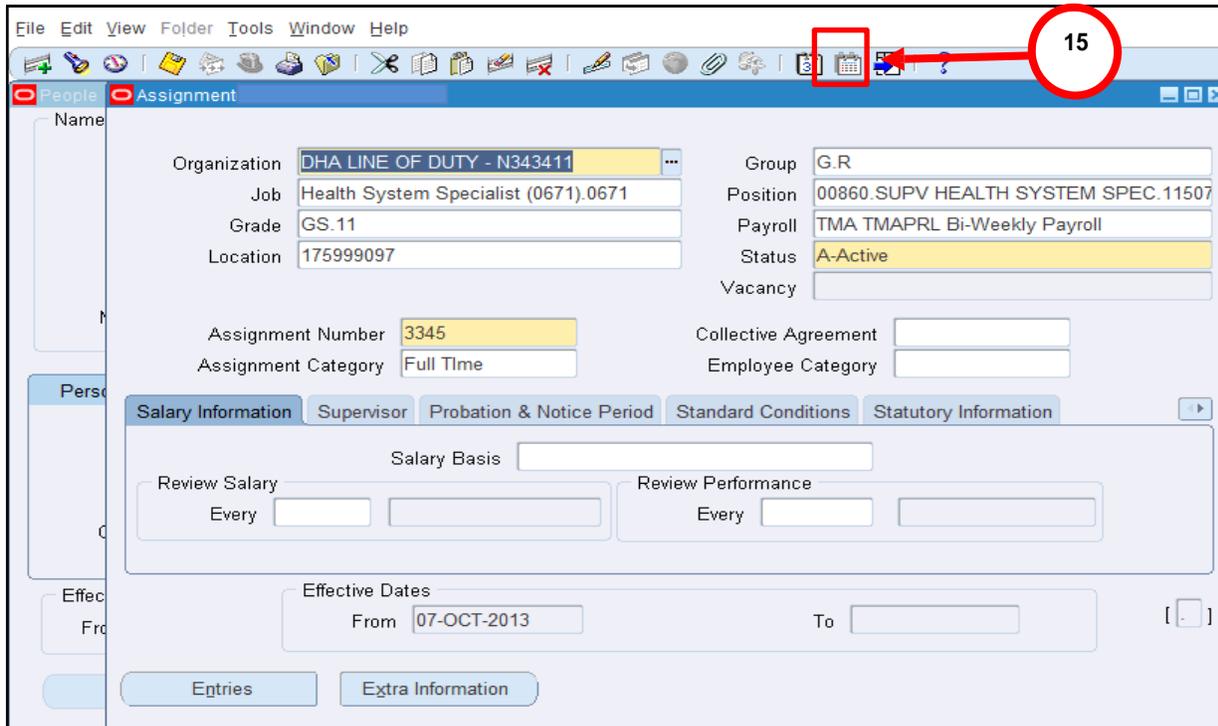
Birth Date 06-14-92 Age 17
Town of Birth
Region of Birth
Country of Birth
Status
Nationality
Registered Disabled

Effective Dates
From 07-OCT-2013 To
Latest Start Date 08-NOV-2009 [TV]

Address Assignment Special Info Others...

14. Click the **Assignment** button to view the **Assignment** form.

Assignment



File Edit View Folder Tools Window Help

People Assignment

Organization: DHA LINE OF DUTY - N343411
Job: Health System Specialist (0671).0671
Grade: GS.11
Location: 175999097

Group: G.R
Position: 00860.SUPV HEALTH SYSTEM SPEC.11507
Payroll: TMA TMAPRL Bi-Weekly Payroll
Status: A-Active
Vacancy:

Assignment Number: 3345
Assignment Category: Full Time

Collective Agreement:
Employee Category:

Salary Information | Supervisor | Probation & Notice Period | Standard Conditions | Statutory Information

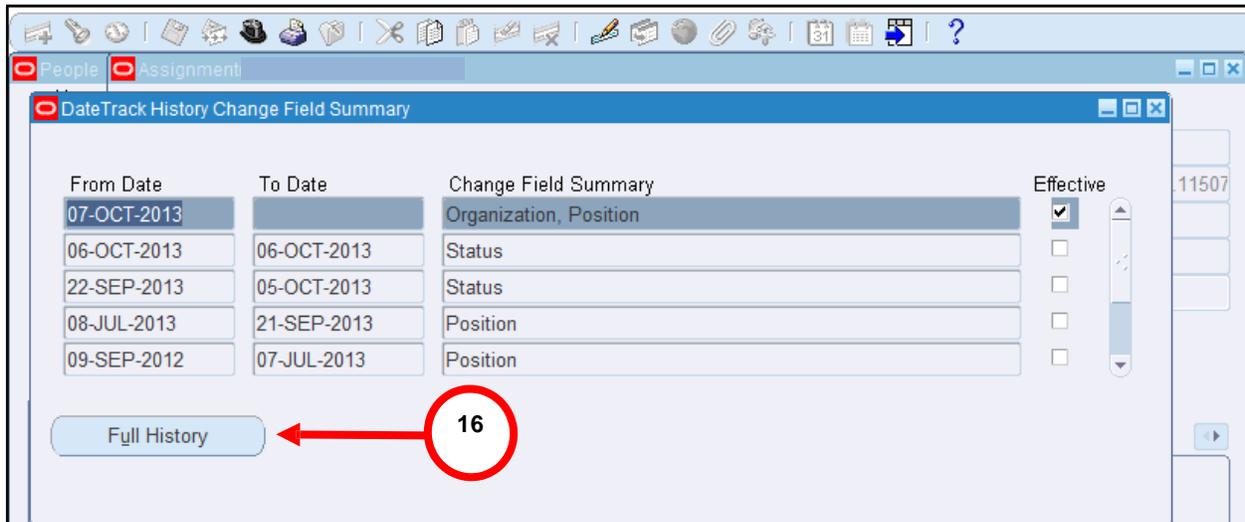
Salary Basis:
Review Salary: Every
Review Performance: Every

Effective Dates: From 07-OCT-2013 To

Entries | Extra Information

15. Click the **Date Track History**  icon on the **Assignment** Form to view the current history for the employee. The **Date Track History Change Field Summary** form displays.

People – Assignment – Date Track History



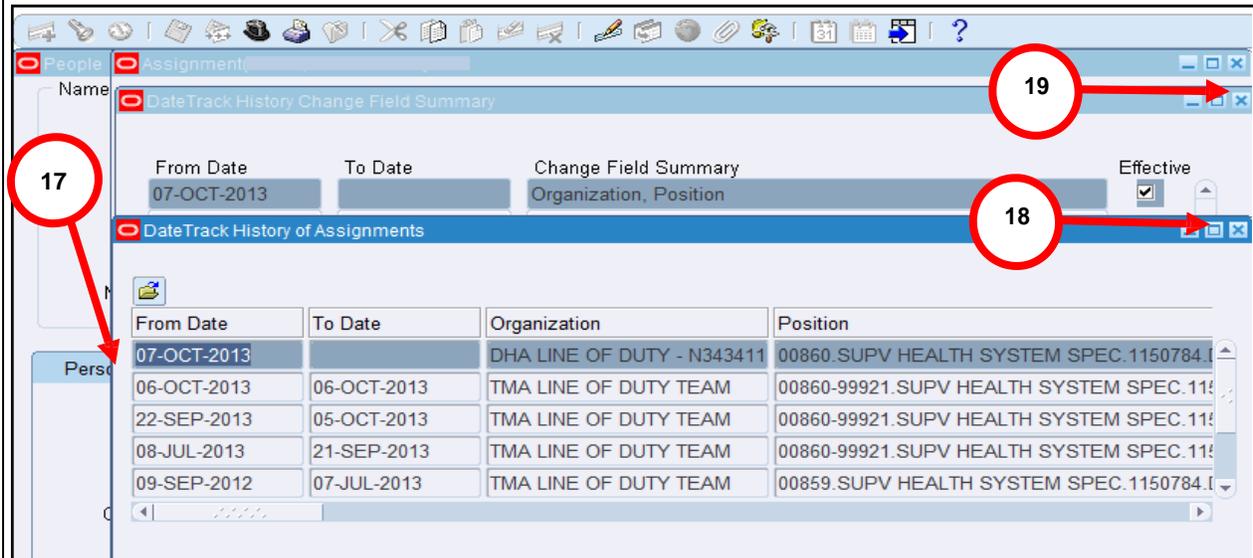
From Date	To Date	Change Field Summary	Effective
07-OCT-2013		Organization, Position	<input checked="" type="checkbox"/>
06-OCT-2013	06-OCT-2013	Status	<input type="checkbox"/>
22-SEP-2013	05-OCT-2013	Status	<input type="checkbox"/>
08-JUL-2013	21-SEP-2013	Position	<input type="checkbox"/>
09-SEP-2012	07-JUL-2013	Position	<input type="checkbox"/>

Full History

16. The **Date Track History Change Field Summary** Form displays a high level summary of what fields were edited for this employee.

Click the **Full History** button to view the employee's history on the **Date Track History of Person** Form for the activity pertaining to the date row selected.

Assignment – Date Track History – Full History



17. The employee history information pertaining to the first line (07-OCT-2013) describes the employee's Org and Position change from TMA Org to DHA Org and Supv. Health to Supv. Health Sys. Spec as of 07-OCT-2013.

The **Date Track History of Assignments** form contains the following columns of employee detail:

Column Name	Column Name	Column Name
From Date	Normal End Time	Recruiter
To Date	Normal Hours	Recruiter Activity
Assignment Number	Normal Start Time	Salary Basis
Contract	Organization	Special Ceiling Point
Employee Category	Payroll	Status
Grade	People Group	Statutory Info
Internal Address	Position	Title
Job	Primary	Vacancy
Last Updated By	Probation End Date	Working Hour Frequency
Last Updated Date	Probation Period	Effective (check box)
Location	Probation Units	
Manager	Reason	

18. Click the X  in the upper right active window to close the **Date Track History of Assignments** form.

19. Click the X  in the upper right active window to close the **Date Track Change Summary** form.



Assignment

Assignment

Organization	DHA LINE OF DUTY - N343411	Group	G.R
Job	Health System Specialist (0671).0671	Position	00860.SUPV HEALTH SYSTEM SPEC.11507
Grade	GS.11	Payroll	TMA TMAPRL Bi-Weekly Payroll
Location	175999097	Status	A-Active
Assignment Number	3345	Vacancy	
Assignment Category	Full Time	Collective Agreement	
		Employee Category	

Salary Information | **Supervisor** | Probation & Notice Period | Standard Conditions | Statutory Information

Name	DOE, JOHN A
Worker Number	3278
Assignment Number	

Effective Dates
From 07-OCT-2013 To [.]

Entries Extra Information

20. The **Assignment** form displays the active assignment details. Click on the **Supervisor** tab to view the current supervisor's name.



Assignment

Assignment

Organization: DHA LINE OF DUTY - N343411
Job: Health System Specialist (0671).0671
Grade: GS.11
Location: 175999097
Group: G.R
Position: 00860.SUPV HEALTH SYSTEM SPEC.11507
Payroll: TMA TMAPRL Bi-Weekly Payroll
Status: A-Active
Vacancy:
Assignment Number: 3345
Assignment Category: Full Time
Collective Agreement:
Employee Category:
Salary Information | Supervisor | Probation & Notice Period | Standard Conditions | Statutory Information
MHS Legal Entity.....
Effective Dates
From: 07-OCT-2013 To: []
Entries | Extra Information

21. Click on the **Statutory Information** tab to view the **Operating Unit** or the **Legal Entity**.
22. Click the **Entries** button to display the **Recurring Accrual Plans** and **Timecard Pay Codes** on the **Element Entries** form.



Assignment - Entries

Element Name	Processing Type	Costing	Reason	Effective Dates From	Effective Dates To
Advanced Annual Leave	Recurring			08-NOV-2009	
Advanced Sick Leave	Recurring			08-NOV-2009	
Annual Leave	Recurring			08-NOV-2009	
BRAC Restored Leave	Recurring			08-NOV-2009	
Compensatory Time	Recurring			08-NOV-2009	
Credit Hours	Recurring			08-NOV-2009	
Military Leave	Recurring			08-NOV-2009	
Religious Compensatory Time	Recurring			08-NOV-2009	
Restored Annual Leave 1	Recurring			08-NOV-2009	
Restored Annual Leave 2	Recurring			08-NOV-2009	
Restored Annual Leave 3	Recurring			08-NOV-2009	

23. View the **Element Entries** form displaying the various **Recurring Accrual Plans** and **Non-recurring Timecard Pay Codes**. **Recurring Accrual Plans** are populated once, only on the first pay period at the beginning of the calendar year, or on the first pay period for new hires based off the new hires start date. **Non-recurring** codes are based off the pay codes provided from the timecard.

Click the  in the upper right active window to close the **Element Entries** form.



Assignment – Entries – Extra Information

The screenshot shows a web application window titled "Assignment". It contains several input fields for employee information:

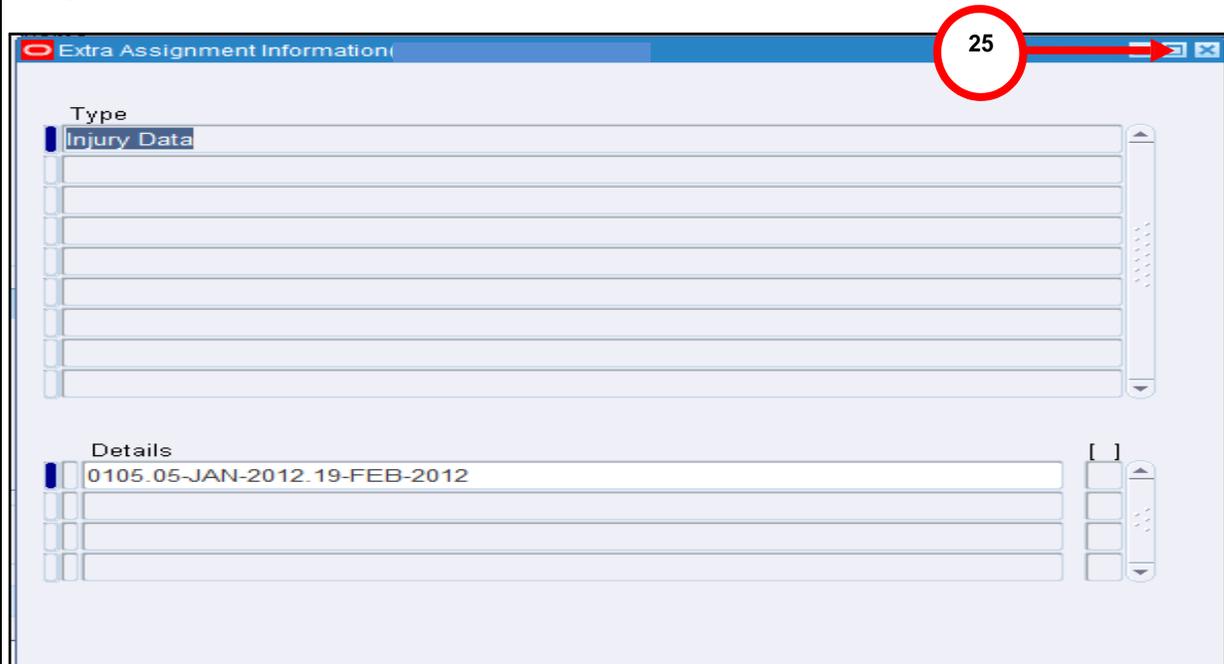
- Organization: DHA LINE OF DUTY - N343411
- Job: Health System Specialist (0671).0671
- Grade: GS.11
- Location: 175999097
- Group: G.R
- Position: 00860.SUPV HEALTH SYSTEM SPEC.11507
- Payroll: TMA TMAPRL Bi-Weekly Payroll
- Status: A-Active
- Vacancy: (empty)
- Assignment Number: 3345
- Assignment Category: Full Time
- Collective Agreement: (empty)
- Employee Category: (empty)

Below the fields are tabs for "Salary Information", "Supervisor", "Probation & Notice Period", "Standard Conditions", and "Statutory Information". The "Statutory Information" tab is selected, showing a text area with "MHS Legal Entity.....".

At the bottom, there are "Effective Dates" fields: "From" (07-OCT-2013) and "To" (empty). Below this are two buttons: "Entries" and "Extra Information". A red circle with the number "24" is positioned over the "Extra Information" button, with a red arrow pointing to it.

24. Click the **Extra Information** button.

Assignment – Extra Information



The screenshot shows a web browser window titled "Extra Assignment Information". In the top right corner of the window, there is a red circle containing the number "25" and a red arrow pointing to the close button (X). The form content is divided into two sections: "Type" and "Details". Under "Type", there is a dropdown menu with "Injury Data" selected. Under "Details", there is a text field containing the text "0105.05-JAN-2012.19-FEB-2012".

25. The **Extra Assignment Information** form displays the **Injury Data Number** along with **Dates** in the **Details** section.

Click the X  in the upper right active window to close the **Extra Assignment Information** form.



5

Assignment

The screenshot shows a web-based form titled "Assignment". The form contains several input fields and dropdown menus. A red circle highlights the number "26" in the window title bar, with a red arrow pointing to the close button (X) in the upper right corner of the window. The form fields are as follows:

Organization	DHA LINE OF DUTY - N343411	Group	G.R
Job	Health System Specialist (0671).0671	Position	00860.SUPV HEALTH SYSTEM SPEC.11507
Grade	GS.11	Payroll	TMA TMAPRL Bi-Weekly Payroll
Location	175999097	Status	A-Active
Assignment Number	3345	Collective Agreement	
Assignment Category	Full Time	Employee Category	

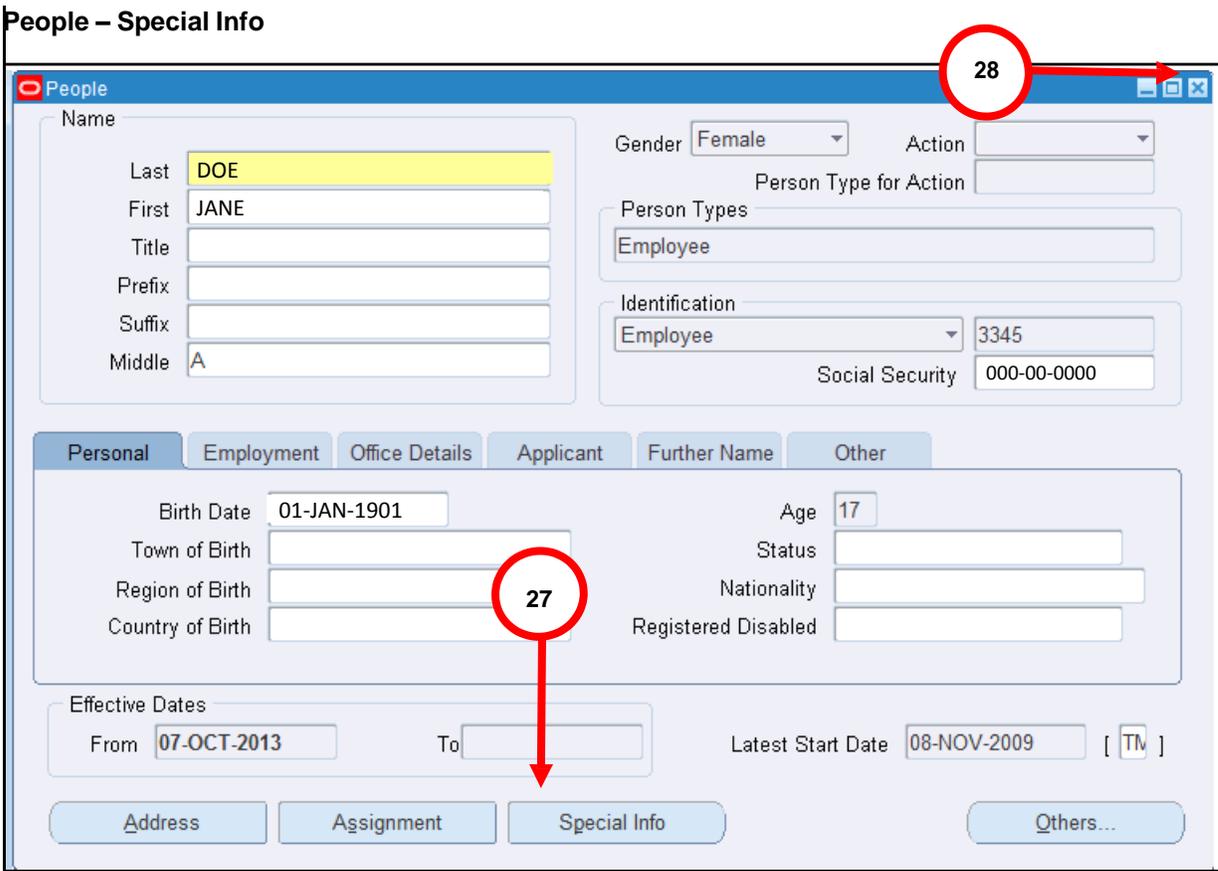
Below the form fields are several tabs: Salary Information, Supervisor, Probation & Notice Period, Standard Conditions, and Statutory Information. The Statutory Information tab is currently selected, showing a text field with "MHS Legal Entity.....". Below this is an "Effective Dates" section with "From" set to "07-OCT-2013" and "To" set to an empty field. At the bottom of the form are two buttons: "Entries" and "Extra Information".

26.

Click the  in the upper right active window to close the **Assignment** form.

Special Info

People – Special Info

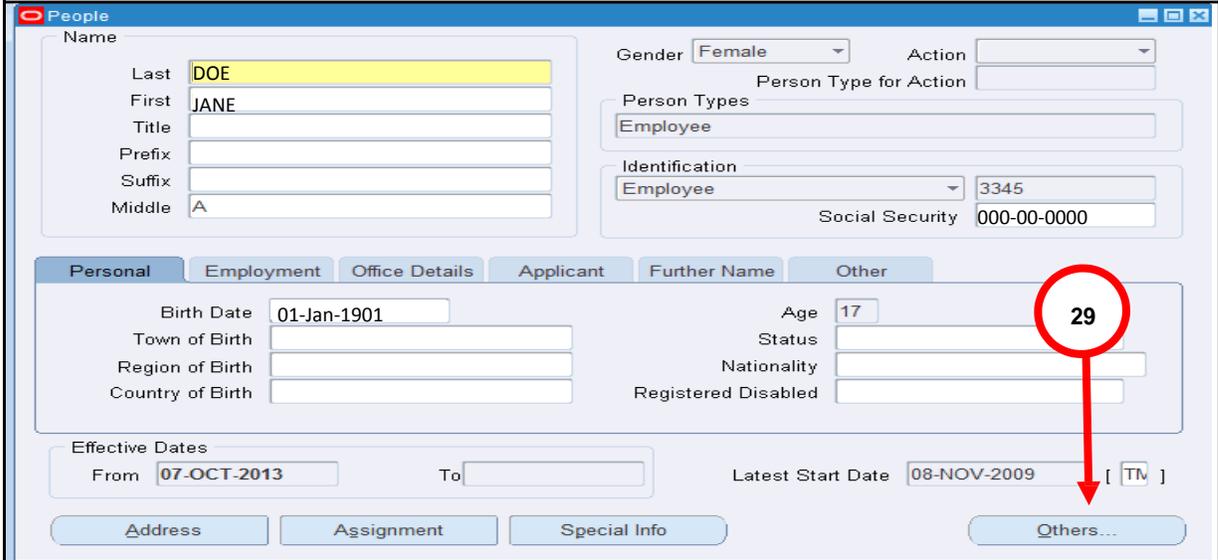


27. Click the **Special Info** button to display the **Special Information** form. The form displays the default **Project and Task** details along with the **Start Date**.

28. Click the **X**  in the upper right active window to close the **Special Information** form.

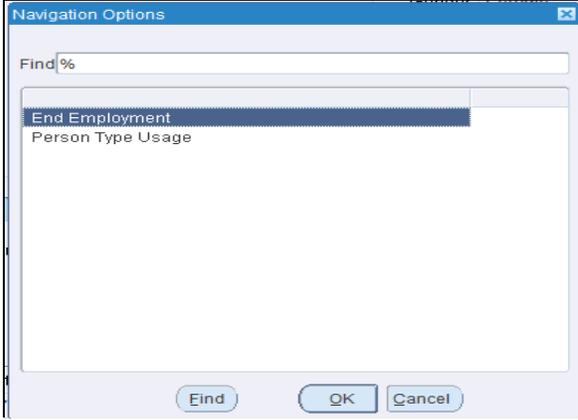
Others

People - Others



29. Click the **Others** button to display the **Navigation Options** form.

People – Others – Navigation Options



30. The **Navigation Options** form displays the location for the **End Employment** option.

Click the **X**  in the upper right active window to close the **Navigation Options** form.



People

31. Click the  in the upper right active window to close the **People** form.

Result

Congratulations! You have successfully accessed and viewed an employee record history in DAI.