

OSC TRAINING

PA321

Developing Guardians of North Carolina's Data

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER

Updated 7/8/22

North Carolina Office of the State Controller

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TABLE OF CONTENTS

INTRODUCTION.....	1
Overview.....	1
Integrated HR-Payroll System Training Curriculum.....	1
PA Curriculum by Security Role	2
Strategy for Training	3
Course Map.....	3
Course Objectives	3
Reference Materials.....	4
LESSON 1: TERMS, CONCEPTS AND INFOTYPES OVERVIEW	5
Lesson 1 Objectives.....	5
PA30 - Maintain Master Data	5
Infotype for Grievance Process	6
Monitoring of Tasks (IT0019).....	8
Description of Buttons	9
Copy and Change Options	10
Entering End Dates	11
LESSON 2: CREATE AND MAINTAIN A GRIEVANCE RECORD	13
Lesson 2 Objectives.....	13
State of North Carolina Grievance Policy	13
Overview of Employee Grievance Policy.....	14
Informal Grievance Process	15
Formal Internal Grievance Process.....	15
External Appeal Process.....	16
Details of Employee Grievance Policy.....	17
Infotype 9834.....	17
Grievable Issue	18

Date of Alleged Event or Action 20

Completion of Infotype..... 39

 Appealed to OAH?..... 39

 OAH Final Decision..... 40

 Examples of Comments 40

Reporting 41

LESSON 3: COURSE REVIEW..... 45

 Course Objectives 45

 Integrated HR-Payroll System 46

 Next Steps..... 47

 Course Assessment/Evaluation 47

INTRODUCTION

Overview

Welcome to the Create & Maintain Grievances - PA321 Virtual Class.

The security role associated with this class is called the Grievance Maintainer. The focus of the class is on the transactions that pertain to specific infotypes on the employee's records. If a correlating Workflow action (like a Suspension) needs to be entered as well, you must ensure that you communicate appropriately with the HR Master Data Maintainer to have those records entered.

The course introduction is an opportunity to get to know others who are attending class as well as to agree on courtesy for the training session. There will be at least one break during this session.

NOTICE!

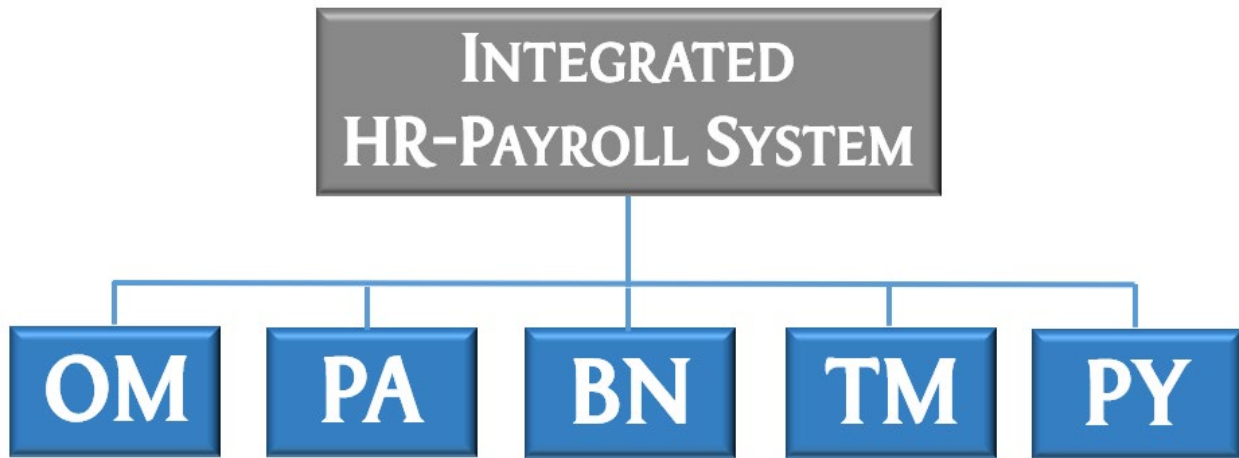
The State of North Carolina Employee Grievance Policy and the Integrated HR-Payroll System Training HELP website can be accessed at the below links.

- OSHR Policy Guide website
 - <https://oshr.nc.gov/policies-forms/discipline-appeals-grievances>
- Integrated HR-Payroll System Training HELP website
 - <https://www.osc.nc.gov/training>

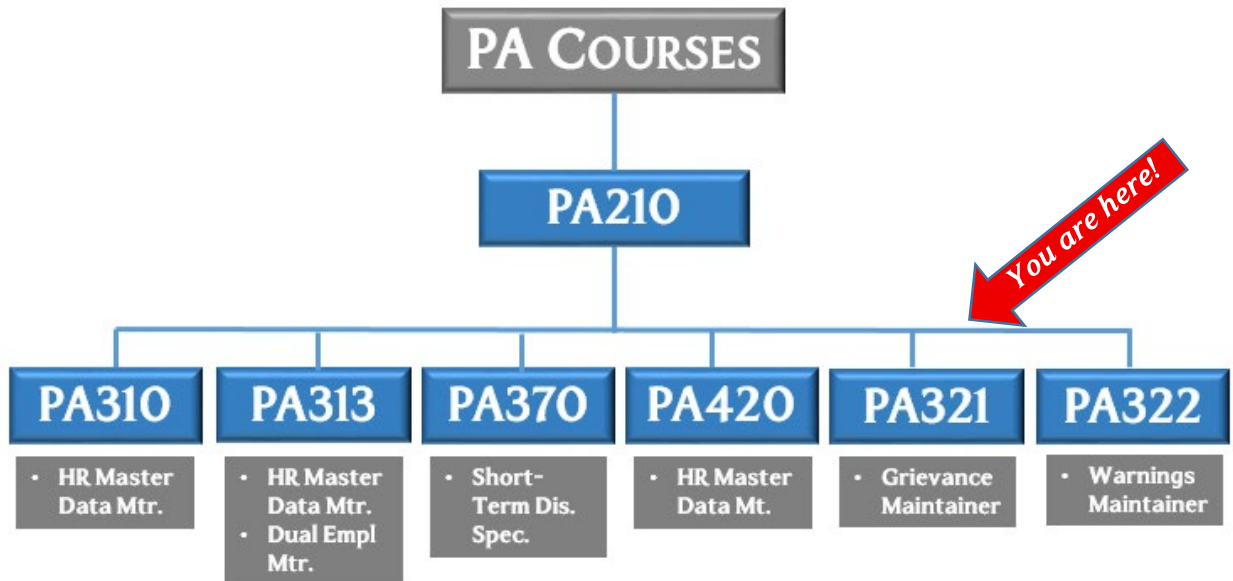
Integrated HR-Payroll System Training Curriculum

The Integrated HR-Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.

PA Curriculum by Security Role



Within the Personnel Administration module, there are several courses. Your position determines which courses you will be required to attend.



Strategy for Training

TELL ME (Concepts)

Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

SHOW ME (Demonstrations)

Instructor will demonstrate job-related tasks performed in the Integrated HR-Payroll System – HANDS OFF.

LET ME (Exercises)

Student will complete the exercises which allows for hands-on practice in class – HANDS ON

SUPPORT ME (Availability)

Instructor will be available to answer questions while the students complete the exercises

Course Map

The lessons covered in this class include:

- Lesson 1: Terms, Concepts, and Infotypes Overview
- Lesson 2: Create and Maintain a Grievance Record
- Lesson 3: Course Review

The Create & Maintain Grievances Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the Integrated HR-Payroll System training environment.

Course Objectives

Upon completion of this course, you should be able to:

- Define key terms and concepts,
- Describe the Integrated HR-Payroll System grievance processes,
- View, create and maintain a grievance, and
- Identify how to access the Grievance reports.

Reference Materials

- Student Guide
- Job Aids
- Work instructions - Business Process Procedures (BPPs)
- OSHR Employee Grievance Policy
- Online help - from the SAP portal

The materials above can be accessed through the OSC Training HELP website. Use the following link to access the HELP website:

<https://www.osc.nc.gov/training>

SUMMARY

This course is intended to give HR professionals an understanding of the Integrated HR-Payroll System Personnel Administration module about Grievance records. This course will provide you with demonstration and practice for creating and modifying actions and records.

LESSON 1: TERMS, CONCEPTS AND INFOTYPES OVERVIEW

Lesson 1 Objectives

Upon completion of this lesson, you should be able to:

- Identify the transaction codes used to maintain a Grievance record
- Identify the applicable infotype and subtypes
- Discuss how to create a reminder to follow-up on a Grievance
- Identify the various functions used to create, maintain, and view Grievance records
- Discuss the application of validity periods and how records are end-dated

PA30 - Maintain Master Data

Area to enter infotype and subtype number directly

You may recall from Personnel Administration Terms, Concepts and Display Data (PA210), transaction code PA20 is used to view individual infotypes. PA30 is the transaction code used to create and maintain Grievances. There are several options available when you access PA30 which include:

- **Tabs:** The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access or use the display All tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.

NOTE: Not all infotypes are in tabs.

- **Period:** You have various options regarding the timeframe you want to use when displaying an infotype. Some infotypes will display only if the **All** option has been selected.

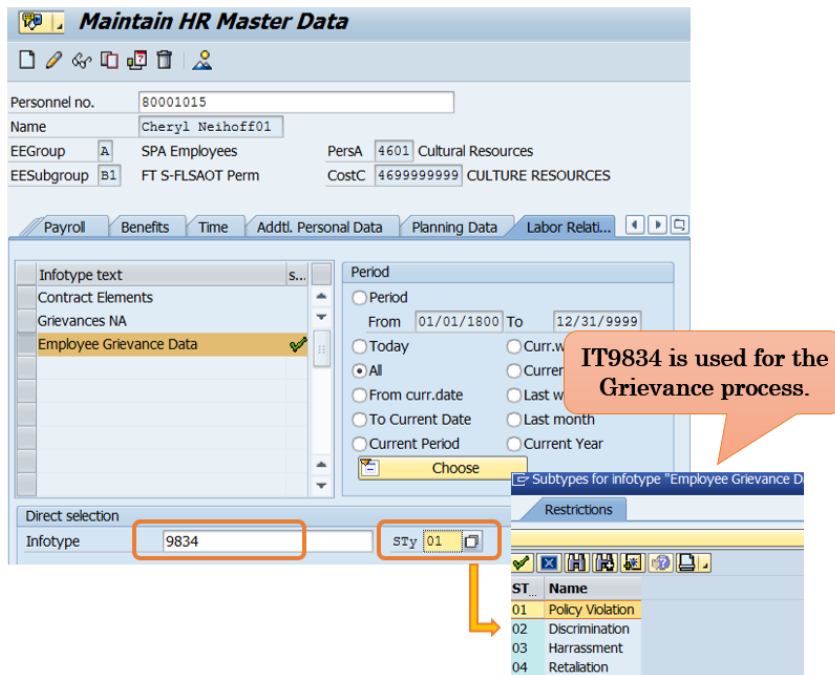
NOTE: When displaying records, no change is necessary to the period selection.

- **Direct Selection:** You can enter either the infotype code and subtype in the Direct Selection field or use the matchcode to search for the infotype and subtype.

NOTE: PA20 can be used to view (not maintain) the employee’s prior grievance or history only.


Commented [ECD1]: We are not using the folder icon anymore. It doesn't add anything and isn't accessible

Infotype for Grievance Process



As indicated in a previous course, employee master data is organized into infotypes or screens of data. Some infotypes have additional screens, called subtypes. Infotypes and subtypes are important concepts in the grievance process.

The Employee Grievance Data (IT9834) infotype is used to track grievances. The Grievance NA (IT0102) infotype was used until 11/30/2013.

 INFORMATION	<i>Effective 12/1/2013, IT0102 is no longer used for grievances. However, it is used to reference/update grievances prior to 12/1/2013.</i>
---	---

Monitoring of Tasks (IT0019)

Additional text icon displays after comments are written

Task Type

Date of Task

Reminder Date

Lead/Follow-up time

Comments

You can create an IT0019 record in the system to help recall when to complete actions or tasks.

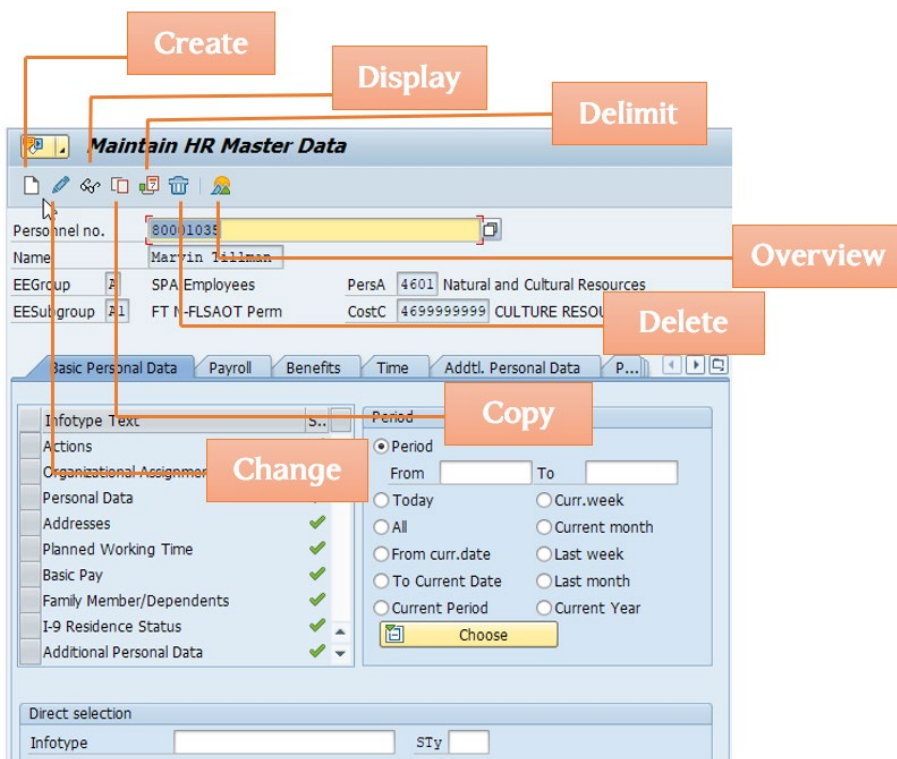
In a previous course, IT0019 was described like a tickler file that is date driven. Two different reports can be run to see which employees have actions or tasks due soon. Run BOBJ report B0099 or the Date Monitoring report (S_PH0_48000450) in the Integrated HR-Payroll System to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype. You may need to enter more than one IT0019 for a transaction. For example, if an employee files a grievance for a suspension without pay, you would perhaps want to follow up within 10 days. But you will also want to make sure the grievance is resolved within 90 days, so you need IT0019 for both dates. It is important to use IT0019 so you can run a report to find the pending records.

The following fields are to be completed:

- **Task type:** Select applicable task type. For a grievable issue, select the appropriate task type. Grievances have various task types.
- **Date of task:** The date of the first scheduled review; re-created for each subsequent review and the final resolution of the record.
- **Reminder date:** The date you need to be reminded that the task is about to be due. Enter or allow the Integrated HR-Payroll System to suggest a date.

- **Comments:** Enter additional details necessary to document the grievable issue. Observe that when you enter comments, the Additional text icon displays on the infotype. Go to the Menu and click on Edit > Maintain Text to add your comments.
- **Lead/follow-up time:** Used to re-program the reminder date

Description of Buttons



There are several ways to Maintain Master Data as listed below.

Create	Create a new infotype for an existing employee
Change	You can correct/revise using the Change (pencil) function NOTE: In the Grievance process, Infotype 9834 is the only infotype on which you should use the Change (pencil) function.

Display	View an individual infotype
Copy	Create a duplicate record to modify with needed changes and maintains history
Delimit	Enter an end date on an infotype to make it inactive
Delete	Eliminate a record CRITICAL! You must contact BEST Shared Services and ask them to delete an IT9834 – Employee Grievance Data record. Only BEST should perform this function. (OSHR approval required)
Overview	View a list or summary of the infotypes data

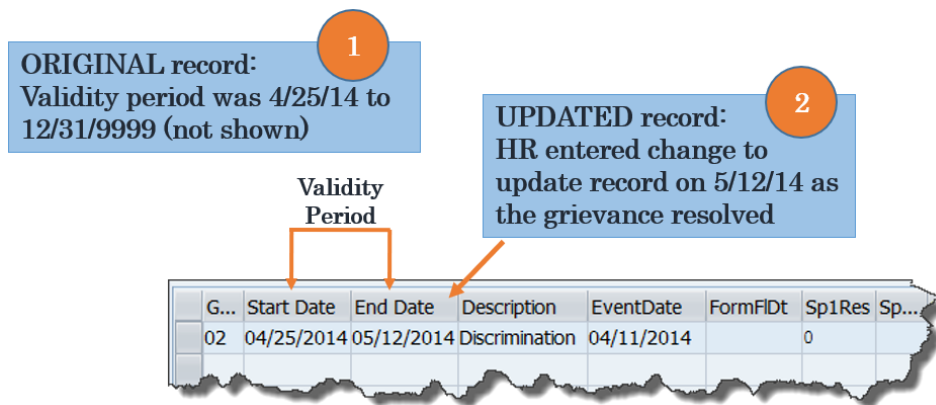
Copy and Change Options

Copy: Create another record to ensure that history is maintained. Unlike other Personnel Administration infotypes, you cannot use the Copy function with the same dates to correct errors.

Change (pencil): **Be extremely careful** when using the Change function. Unlike other Personnel Administration (PA) infotypes, it is sometimes necessary to use Change to correct errors in IT9834. If you used the Copy function instead of Change, this action will create another record, even though you are using the same effective date.

- You can correct a current (not historical) record only. Only BEST Shared Services can make changes to historical records.
- Please note that permission is granted to use the Change function on IT9834 only. The rule that you are to use the Copy function and never the pencil for all other PA infotypes is still applicable.

Entering End Dates



All records must have a beginning (start) date and an ending date, a time span that is called the **validity period**. When an end date is entered, the record is **delimited** (no longer active). For Grievances records, the end date will **always be manually entered** by the Maintainer.

NOTE: In other HR functions, the end date can be either automatically created by the Integrated HR-Payroll System when a new record with a new effective date is entered or entered manually by HR.

The ending date on an IT9834 Grievance is handled as follows:

Leave the end date as 12/31/9999 until it is resolved or has progressed through all available steps/appeals. At that time, the agency will delimit the record. Although policy dictates a set number of days for resolution for grievances, you should not enter those dates when you initially create the infotype. For example, an employee files a grievance on 4/1/14 for suspension without pay, which has 90 days per policy. When you create the grievance, the validity period is 4/1/14 – 12/31/9999. You create IT0019 with a reminder for 90 days. When the grievance progresses to the next step or is resolved, whether within two days of the initial filing, or the entire 90 days, go back and delimit the initial infotype. Use IT0019 to remind you to follow the transaction carefully so that the proper end date is applied as the transaction either continues in the process or is resolved.

It is **crucial** to understand the concept of validity periods, how history is preserved, and when it is applicable to apply the end date.

KNOWLEDGE CHECK

QUESTION	ANSWER
1. All records must have a beginning (start) date and an ending date, a time span that is called the ___.	
2. Infotypes and ___ are important concepts in the grievance process.	
3. You must contact ___ to request they delete an IT9834 – Employee Grievance Data record.	
4. Infotype ___ is used to track grievances.	
5. On a Grievance, leave the end date as 12/31/9999 until it is resolved or has progressed through all available ___.	

SUMMARY

In this lesson, you learned to:

- Identify the transaction codes used to maintain a Grievance record,
- Identify the applicable infotype and subtypes,
- Discuss how to create a reminder to follow-up on a Grievance,
- Identify the various functions used to create, maintain, and view Grievance records, and
- Discuss the application of validity periods and how records are end-dated.

LESSON 2: CREATE AND MAINTAIN A GRIEVANCE RECORD

Lesson 2 Objectives

Upon completion of this lesson, you should be able to:

- Enter grievance data as events occur.
- Provide employee grievance data to OSHR as requested.

State of North Carolina Grievance Policy

It is the policy of North Carolina State government that a grievance process exists to allow for prompt, fair and orderly resolution of grievances arising out of employment. Each agency shall adopt the Employee Grievance Policy as approved by the State Human Resources Commission.

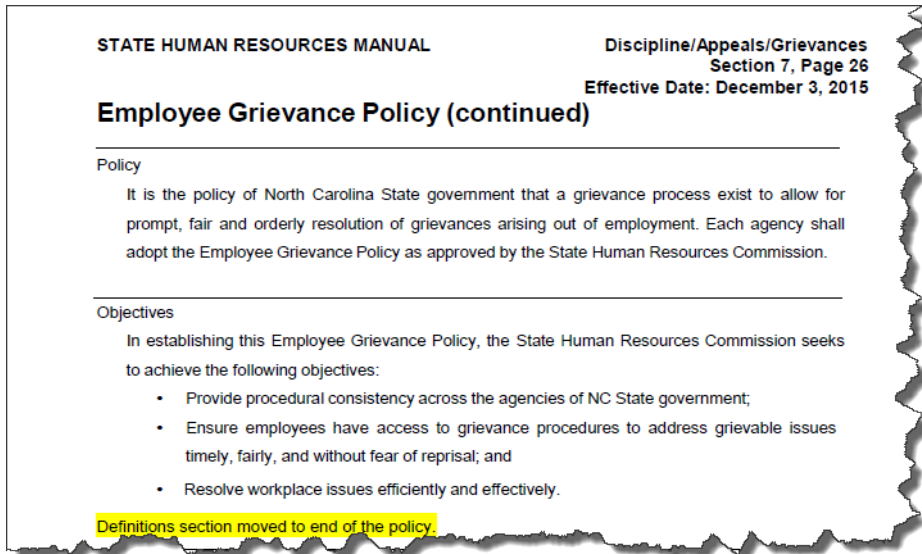
Data must be entered the day an event occurs. *The 15-calendar day clock starts the day after the alleged event took place.*

End dates must be entered after resolution at each step. For example – if a potential grievance is resolved at the Informal Discussion step, the end date must be entered.

The purpose of this infotype is to track and report events occurring in the EEO Informal Complaint and Grievance process, and the Policy Violation Grievance process beginning with the informal complaint step through the disposition of a complaint at the Office of Administrative Hearings (OAH).

The data captured will reflect the State's activity for employee complaints and grievances. The data also will be used to determine training and/or education needs for employees.

The Employee Grievance Policy link is: <https://oshr.nc.gov/policies-forms/discipline-appeals-grievances/employee-grievance-policy>



Overview of Employee Grievance Policy



A formal grievance or complaint must be filed within 15 calendar days of the alleged event or action that is the basis of the grievance. The 15 Calendar-day clock starts the day after the alleged event took place. Unlawful discrimination, harassment or retaliation complaints must be filed under the Equal Employment Opportunity (EEO) Informal Inquiry process before proceeding to the formal internal grievance process. All other grievable issues must first be discussed with the immediate or other appropriate supervisor in the employee’s chain of command or other appropriate personnel who has jurisdiction regarding the alleged event or action that is the basis of the grievance prior to filing a formal grievance except for disciplinary action grievances. Disciplinary action grievances as well as separation due to unavailability shall proceed directly to the formal internal grievance process.

For additional information regarding the Employee Grievance Policy, please use the following link: <https://oshr.nc.gov/policies-forms/discipline-appeals-grievances/employee-grievance-policy>

Informal Grievance Process

INFORMAL GRIEVANCE PROCESS	
<ul style="list-style-type: none"> • Informal Discussion <input type="checkbox"/> with Supervisor or Appropriate Manager • Equal Employment Opportunity Informal Inquiry • Check to see if grievance rises to the level of an unlawful act • Employee Files Formal Grievance if the Issue is Not Resolved 	Within: 15 Calendar Days of the Alleged Event or Action

Commented [ECD1]: Is this word necessary?

Formal Internal Grievance Process

FORMAL INTERNAL GRIEVANCE PROCESS	
<ul style="list-style-type: none"> • Step 1: Mediation 	Within: 35 Calendar Days
<ul style="list-style-type: none"> • Employee Files Step 2 	Within: 5 Calendar Days
<ul style="list-style-type: none"> • Step 2: Employee Presents Grievance to Hearing Officer/ Panel Hearing Officer/Panel Makes Proposed Recommendation to the Director of State Human Resources 	Within: 35 Calendar Days
<ul style="list-style-type: none"> • Office of State Human Resources Reviews Proposed Recommendation and Approves as Written or Returns with Recommendations for Modification or Reversal 	Within: 10 Calendar Days
<ul style="list-style-type: none"> • Agency Head Renders Final Agency Decision (FAD) 	Within: 5 Calendar Days
<ul style="list-style-type: none"> • Formal Internal Grievance Process Completed 	Within: 90 Calendar Days

External Appeal Process

EXTERNAL APPEAL PROCESS	
<ul style="list-style-type: none">Employee May Petition for a Contested Case Hearing with OAH if Issue is Appealable	Within: 30 Calendar Days of the FAD

Additional Resource
Refer to the OSC Training website in HELP documents for more information about creating and maintaining a Grievance record. Search for the following Job Aid: <ul style="list-style-type: none"><i>Grievance Maintainer</i>

Details of Employee Grievance Policy

Infotype 9834

Create Employee Grievance Data (9834)

Personnel No: 80001035 Name: Marvin Tillman

EEGroup: A SPA Employees PersA: 4001 Natural and Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 07/15/2019 To: 12/31/9999 Record Complete

Employee Grievance Data

Grievable Issue: 01 Policy Violation Date of Alleged Event or Action:

Policy Violation Action	Discrimination Action	Discrimination Basis
<input type="checkbox"/> Dismissal	<input type="checkbox"/> Hiring	<input type="checkbox"/> Race
<input type="checkbox"/> Demotion	<input type="checkbox"/> Promotion	<input type="checkbox"/> Sex
<input type="checkbox"/> Suspension without Pay	<input type="checkbox"/> Demotion	<input type="checkbox"/> Religion
<input type="checkbox"/> Unavailability Separation	<input type="checkbox"/> Compensation	<input type="checkbox"/> National Origin
<input type="checkbox"/> Inaccurate & Misleading	<input type="checkbox"/> Written Warning	<input type="checkbox"/> Genetic Information
<input type="checkbox"/> Overall Performance Rating	<input type="checkbox"/> Work Assignments	<input type="checkbox"/> Political Affiliation
<input type="checkbox"/> Priority Promotion	<input type="checkbox"/> Overall Performance Rating	<input type="checkbox"/> National Guard
<input type="checkbox"/> Priority Reemployment	<input type="checkbox"/> Suspension without Pay	<input type="checkbox"/> Veteran Status
<input type="checkbox"/> Veterans Preference	<input type="checkbox"/> Reasonable Accommodation	<input type="checkbox"/> Sexual Orientation
<input type="checkbox"/> Failure to Post	<input type="checkbox"/> RIF	<input type="checkbox"/> Color
<input type="checkbox"/> "Whistle Blower"	<input type="checkbox"/> Training	<input type="checkbox"/> Age
	<input type="checkbox"/> Dismissal	<input type="checkbox"/> Disability
		<input type="checkbox"/> Ethnicity
		<input type="checkbox"/> Gender Identity/Expression
		<input type="checkbox"/> Pregnancy

Informal Process

Informal Step Taken: Date Informal Completed:

Formal Grievance Filed?: Grievance Filed Timely?: Date Formal Grievance Filed:

Step 1

Step 1 Result/Mediation: Date Step 1 Completed:

Step 2

Step 2 Filed?: OSHR Reviewed FAD:

Step 2 Result/FAD: Date FAD Issued: FAD Exceeded Timeline:

OAH

Appealed to OAH?: OAH Filing Date: OAH Deadline:

OAH Case Number: OAH Case Status:

OAH Remand Back To Agency: Remand Date:

OAH Final Decision: Decision Date:

Grievable Issue

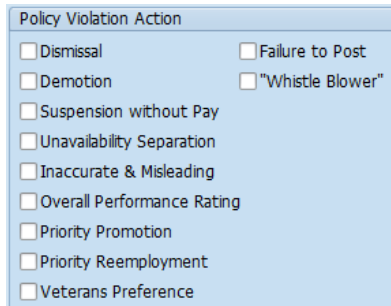
The first entry in each record will be the Grievable Issue which is the basis for the grievance. There are four possible entries for the Grievable Issue:

- **Policy Violation** (01)
- **Discrimination** (02)
- **Harassment** (03)
- **Retaliation** (04)

For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected. The record will not allow you to save unless you have checked an item in the appropriate box.

The check box entries you must make for each grievable issue are as follows:

Policy Violation



The screenshot shows a form titled "Policy Violation Action" with the following checkboxes:

- Dismissal
- Demotion
- Suspension without Pay
- Unavailability Separation
- Inaccurate & Misleading
- Overall Performance Rating
- Priority Promotion
- Priority Reemployment
- Veterans Preference
- Failure to Post
- "Whistle Blower"

- Must make one selection from the Policy Violation Action box.
- Do **not** make any selections in the Discrimination Action or the Discrimination Basis boxes.

Discrimination

Discrimination Action		Discrimination Basis	
<input type="checkbox"/> Hiring	<input type="checkbox"/> RIF	<input type="checkbox"/> Race	<input type="checkbox"/> Color
<input type="checkbox"/> Promotion	<input type="checkbox"/> Training	<input type="checkbox"/> Sex	<input type="checkbox"/> Age
<input type="checkbox"/> Demotion	<input type="checkbox"/> Dismissal	<input type="checkbox"/> Religion	<input type="checkbox"/> Disability
<input type="checkbox"/> Compensation		<input type="checkbox"/> National Origin	<input type="checkbox"/> Ethnicity
<input type="checkbox"/> Written Warning		<input type="checkbox"/> Genetic Information	
<input type="checkbox"/> Work Assignments		<input type="checkbox"/> Political Affiliation	
<input type="checkbox"/> Overall Performance Rating		<input type="checkbox"/> National Guard	
<input type="checkbox"/> Suspension without Pay		<input type="checkbox"/> Veteran Status	
<input type="checkbox"/> Reasonable Accommodation		<input type="checkbox"/> Sexual Orientation	
		<input type="checkbox"/> Gender Identity/Expression	
		<input type="checkbox"/> Pregnancy	

- **Must** make one selection from the Discrimination Action box **and** at least one selection from the Discrimination Basis box.
- Do **not** make any selections from the Policy Violation Action box.

Harassment

Discrimination Basis	
<input type="checkbox"/> Race	<input type="checkbox"/> Color
<input type="checkbox"/> Sex	<input type="checkbox"/> Age
<input type="checkbox"/> Religion	<input type="checkbox"/> Disability
<input type="checkbox"/> National Origin	<input type="checkbox"/> Ethnicity
<input type="checkbox"/> Genetic Information	
<input type="checkbox"/> Political Affiliation	
<input type="checkbox"/> National Guard	
<input type="checkbox"/> Veteran Status	
<input type="checkbox"/> Sexual Orientation	
<input type="checkbox"/> Gender Identity/Expression	
<input type="checkbox"/> Pregnancy	

- **Must** make at least one selection from the Discrimination Basis box.
- Do **not** make any selections from the Policy Violation Action or the Discrimination Action boxes.

Retaliation

Discrimination Action	
<input type="checkbox"/> Hiring	<input type="checkbox"/> RIF
<input type="checkbox"/> Promotion	<input type="checkbox"/> Training
<input type="checkbox"/> Demotion	<input type="checkbox"/> Dismissal
<input type="checkbox"/> Compensation	
<input type="checkbox"/> Written Warning	
<input type="checkbox"/> Work Assignments	
<input type="checkbox"/> Overall Performance Rating	
<input type="checkbox"/> Suspension without Pay	
<input type="checkbox"/> Reasonable Accommodation	

- **Must** make one selection from the Discrimination Action box.
- Do **not** make any selections from the Policy Violation Action or Discrimination Basis boxes.

Date of Alleged Event or Action

Enter the date of the alleged event or action.

Date of Alleged Event or Action	<input checked="" type="checkbox"/>
---------------------------------	-------------------------------------

The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. **This date is critical information as it begins the timeframes for the entire grievance process.**

EXERCISE 2.0: Logging on to the Integrated HR-Payroll System

SCENARIO

You need to log into the Integrated HR-Payroll System. Use the steps below to log into the system

Instructions

1. Use the task bar to open a new Internet window.
2. Access the **Integrated HR-Payroll System portal** using your own User ID and password.
3. Click the **SAP GUI** tab.
4. Click the header for the **Training Sandbox (E1T 899)** along the left side of your screen, then click the icon for **Training Sandbox (E1T 899)**. The SAP Easy Access screen displays.

NOTE: If necessary, click 'Open,' 'Allow,' and green check any boxes that pop-up for approval.

5. On the taskbar, **leave open** the **SAP Easy Access** screen and the **GoToMeeting** tasks; **close** all other tasks.
6. Click the PA321 **GoToMeeting** task on your taskbar to return to the Virtual Class.
7. Chat in when you are finished to let the Instructor know you have successfully logged on. The Instructor will acknowledge.


EXERCISE 2.1: Create a Grievance Record

SCENARIO

Cheryl Neihoff is currently an Art Handler for the Department of Cultural Resources. She applied for a Museum Technician position in her department. She received an interview on December 3rd; however, she was not selected for the position. Management selected a person who was not a current State Employee who had no prior state government experience.

Ms. Neihoff received her denial letter on December 12th. On December 13th, she followed the State of NC Employee Grievance Policy by requesting an informal discussion. During the informal discussion, Ms. Neihoff asked her supervisor why she did not receive the promotion. Ms. Neihoff was not satisfied with the response from her supervisor. Her Supervisor followed the conversation with a written summary of what they had discussed (per policy). The Supervisor had indicated that she felt she had made a correct hiring decision.

Ms. Neihoff made the decision to file a formal internal grievance the following day because she did not feel that the situation was satisfactorily resolved.


 CAUTION	<i>Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.</i>
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PART A: Create IT9834 - Employee Grievance Data

Instructions

Infotype 9834 must be created in the system to track the grievance process.

You are currently on the SAP Easy Access screen.


1. Enter transaction code **PA30** in the Command field and click .

- Enter the **personnel number** from the table below based on the student ID your instructor assigns you.

PERNR: CHERYL NEIHOFF							
<i>A</i>	<i>80001015</i>	<i>F</i>	<i>80001020</i>	<i>K</i>	<i>80001025</i>	<i>P</i>	<i>80001030</i>
<i>B</i>	<i>80001016</i>	<i>G</i>	<i>80001021</i>	<i>L</i>	<i>80001026</i>	<i>Q</i>	<i>80001031</i>
<i>C</i>	<i>80001017</i>	<i>H</i>	<i>80001022</i>	<i>M</i>	<i>80001027</i>	<i>R</i>	<i>80001032</i>
<i>D</i>	<i>80001018</i>	<i>I</i>	<i>80001023</i>	<i>N</i>	<i>80001028</i>	<i>Inst 1</i>	<i>80001033</i>
<i>E</i>	<i>80001019</i>	<i>J</i>	<i>80001024</i>	<i>O</i>	<i>80001029</i>	<i>Inst 2</i>	<i>80001034</i>



- Click **Enter** on the keyboard to validate your entry.
- Complete the following fields:

Field	Value
Infotype	9834 - Employee Grievance Data
Subtype	01 - Policy Violation

- Click or press **Enter** on the keyboard to validate your entry.
- Click the **Create**  button to begin a new Grievance record.
- Complete the following fields:

Field	Value
Start	December 17, <current year> CRITICAL: The Start Date is the date you create the first entry. Once this date is saved it cannot be changed.
End	Leave it as 12/31/9999

Action/Basis Boxes	Policy Violation Action <ul style="list-style-type: none"> • Priority Promotion For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected. <p>NOTE: The record will not allow you to save unless you have checked an item in the appropriate box.</p>
Date of Alleged Event or Action	December 12, <current year> The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the timeframes for the entire grievance process.

8. Click or press **Enter**  to validate your changes.
9. Click the **Save**  button to save the record creation.

PART B: Change IT9834 - Informal Step Taken

STATUS

Ms. Neihoff met with her supervisor on December 13th to discuss her concerns about not receiving the position. After the discussion, Ms. Neihoff's supervisor responded to Ms. Neihoff in a memo and sent a copy to Human Resources as instructed in the grievance policy.

The IT9834 record must reflect Ms. Neihoff's informal discussion with her supervisor.

10. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Informal Step Taken	Unresolved, Informal Discussion
Date Informal Completed	December 13 th - <current year>

The Date Informal Completed is the date of the written response of the outcome of the Informal Discussion or the date of the written response from the EEO Informal Inquiry to the complainant.

NOTE: A date must be recorded for both resolved and unresolved outcomes.

- 11. Click the **Enter**  button.
- 12. Click the **Save**  button.

PART C: Change IT9834 - Date Formal Grievance Filed

STATUS

You received a copy of Ms. Neihoff's formal grievance Step 1-Mediation on December 14th. Her grievance was timely filed.

The IT9834 record must be updated to reflect when Ms. Neihoff filed a formal grievance.

- 13. On the next entry, click the **Change (F6)**  button to maintain the record.


Field	Value
Formal Grievance Filed?	Yes
Date Formal Grievance Filed	December 14th, <current year>

The Date Formal Grievance Filed is the date that the formal grievance was filed with the agency following the Informal Discussion or EEO Informal Inquiry. The grievance **must be filed within 15 calendar days** of the Date of the Alleged Event or Action or the date of receiving the conclusions of the EEO Informal Inquiry. Remember: *the 15 Calendar day clock starts the day after the alleged event took place.*

A grievance cannot be filed unless one of the informal processes has been completed and the grievance is filed within the 15-calendar day time frame. Not all grievances require an informal step first. Examples include (but are not limited to) Disciplinary Action or Separation due to Unavailability/Unavailable to Work.

If the grievance is filed within 15-calendar days of the Date of the Alleged Event or Action for policy violations or Date of the Written response for the EEO Informal Inquiry, it is timely. The grievance can proceed.

If the grievance is filed at any date after the 15-calendar day timeframe, it is untimely. The grievance cannot proceed.



INFORMATION *The Grievance Filed Timely field is grayed out and will calculate automatically.*

14. Click the **Enter**  button.


15. Click the **Save**  button.

PART D: Change IT9834 – Step 1 Result/Mediation

STATUS

The Step 1 Mediation was held December 22nd. You were notified by copy of the Mediation Impasse paperwork that the results of Ms. Neihoff's Step 1-Mediation was an impasse.

The IT9834 record must be updated to reflect that Ms. Neihoff and an agency respondent attended a Mediation session held on Dec. 22nd.

16. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 1 Result/Mediation	Impasse
Date Step 1 Completed	December 22nd, <current year>

Step 1 is Mediation. The results of mediation will be one of the following:

- Resolution** An agreement was reached. The grievance has ended.
- Impasse** No agreement was reached. The grievant may file Step 2 within 5 calendar days.
- Withdrawn** The grievant chose to withdraw the grievance. The grievance has ended.
- Postponed** The mediation was postponed due to extenuating circumstances.

- No Show** The grievant did not attend the mediation. The grievance has ended.

- Untimely** The grievant did not file within the designated timeframe requirement.

A grievant who does not attend the mediation (i.e. no show) forfeits the right to proceed with the internal grievance process.

For Resolution, Impasse and No Show Step 1 results, the Date Step 1 Completed will be the last date of mediation.


For Withdrawn and Postponed Step 1 results, the Date Step 1 Completed will be the date that the grievant withdrew the grievance or the date the agency agreed to postpone the mediation.

For Untimely Step 1 Results, the Date Step 1 Completed will be the date of the filing deadline.

If a grievance is resumed or withdrawn after postponement, the Step 1-Result and Date Step 1 Completed entries will be changed to reflect the new outcome.

NOTE: For Resolution, Withdrawn, No Show and Untimely, the record should be delimited since all of these results effectively end the grievance.

It is important to include a date for all Step 1 results.

- 17. Click the **Enter**  button.
- 18. Click the **Save**  button.

Additional Resource
Refer to the OSC Training website in HELP documents for examples of comments to include on the Grievance infotype. Search for the following Job Aid: Grievance Maintainer

PART E: Change IT9834 - Step 2 Hearing

STATUS

After the Step1-Mediation resulted in an impasse, Ms. Neihoff decided to file for a Step 2-Hearing. You receive a copy of her appeal for Step-2 Hearing on December 26th, it was timely filed.

The IT9834 record must be updated to reflect that Ms. Neihoff’s mediation resulted in an impasse. Ms. Neihoff made the decision to file for a Step 2 Hearing on Dec. 26th.

19. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 2 Filed?	Yes CRITICAL: It is imperative that this field be completed with a Yes or No following each impasse entry.

If Step 2 is filed within five calendar days of the date of mediation, it is timely. The grievance can proceed.

If Step 2 is filed at any date after the five-calendar day time frame, it is untimely. The grievance cannot proceed. An Untimely filing of a Step 2 Grievance is a grievance filed after the five Calendar day filing deadline has expired. You must notify the employee in writing.

20. Click the **Enter**  button.

21. Click the **Save**  button.

PART F: Change IT9834 - Step 2 Results/FAD

STATUS

You received a copy of Ms. Neihoff’s Step 2-Hearing decision that was held on January 13th. The decision was upheld.

The IT9834 record must be updated to reflect that a hearing was held on January 13th.

22. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 2 Result/FAD	Upheld
OSHR Reviewed FAD	Yes
Date FAD Issued	1-13- <next year>

Step 2 is a hearing before a hearing officer or hearing panel. The Step 2 Results/FAD will be one of the following:

- Upheld** Alleged action upheld/unchanged
- Reversed** Alleged action reversed
- Modified** Alleged action modified
- Withdrawn** Grievant chose to withdraw grievance. The grievance has ended.
- Resolved Prior to FAD** Agreement reached before FAD was issued. The grievance has ended.
- No Show** The grievant did not attend the hearing. The grievance has ended.
- Untimely** The grievant did not file within the designated timeframe requirements.

The Date FAD Issued is the date that the grievant is issued the Final Agency Decision (FAD). The internal grievance process has ended. The agency then verifies for an appeal to OAH and would delimit the record manually after confirming no appeal has been made.

However, if the grievance were to be resolved before Step 2, the agency would delimit the infotype at that point.

23. Click the **Enter**  button.

24. Click the **Save**  button.

If the grievant is not satisfied with the FAD, the grievant may file a Petition for a Contested Case Hearing with the Office of Administrative Hearings (OAH) in cases where the grievable issue can be appealed.

This exercise is complete.

Additional Resource

Refer to the OSC Training website in HELP documents for examples of comments to include on the Grievance infotype.

Search for the following Job Aid:

Grievance Maintainer

EXERCISE 2.2: Create a Discrimination (Race/Age) Grievance Record

SCENARIO

The North Carolina Department of Administration, EEO Office received a timely complaint filed on April 25th from Facility Electrician James (Jimmy) C. Kracklin (African American/Age 60) against Lead Facility Maintenance Supervisor Dalton K. Samuels (Caucasian/Age 37) for alleged discrimination based on race and age.


On March 28th while working on the Department of Commerce campus, Samuels called Kracklin "Jimmy Crack Corn." Kracklin told Samuels the phrase sounded racist to him. Kracklin claimed Samuels looked the phrase up on the Internet and found it was a song about slaves but never apologized. Also, Samuels referred to Kracklin, Electronics Tech Alvin Greene (Caucasian /Age 65), and Electronics Tech Johnny Craven (Caucasian /Age 51) as his "geriatric crew." He has heard the term used more than once. He last heard it on April 11th. Kracklin submitted a request to move to a new team that was working on a project of interest to him. His request was denied. Kracklin filed a grievance for discrimination.

REMEMBER: Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

PART A: Create IT9834 - Employee Grievance Data

Instructions

You are currently on the SAP Easy Access screen.


1. Enter transaction code **PA30** in the Command field and click .

2. Enter the **personnel number** from the table below based on the student ID your instructor assigned you.

PERNR: JIMMY KRACKLIN							
A	10000071	F	10000076	K	10000081	P	10000086
B	10000072	G	10000077	L	10000082	Q	10000087
C	10000073	H	10000078	M	10000083	R	10000088
D	10000074	I	10000079	N	10000084	Inst 1	10000089
E	10000075	J	10000080	O	10000085	Inst 2	10000090



3. Click **Enter** on the keyboard to validate your entry.
4. Complete the following fields:

Field	Value
Infotype	9834 - Employee Grievance Data
Subtype	02 - Discrimination

5. Click or press **Enter** on the keyboard to validate your entry.
6. Click the **Create**  button to begin a new Grievance record.
7. Complete the following fields:

Field	Value
Start	April 25, <current year> CRITICAL: The Start Date is the date you create the first entry. Once this date is saved it cannot be changed.
End	Leave 12/31/9999

<p>Discrimination Action/Work Assignments</p>	<p>Discrimination Action</p> <ul style="list-style-type: none"> • Work Assignment <p>Discrimination Basis</p> <ul style="list-style-type: none"> • Race • Age <p>NOTE: You must select the Work Assignment before you select the Basis (Race & Age).</p> <p>For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry should be restricted to the applicable boxes for the grievable issue you selected.</p> <p>NOTE: The record will not allow you to save unless you have checked an item in the appropriate box.</p>
<p>Date of Alleged Event or Action</p>	<p>April 11, <current year></p> <p>The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the time frames for the entire grievance process.</p>

8. Click or press **Enter**  to validate your changes.
9. Click the **Save**  button to save the record creation.

PART B: Change IT9834 - Informal Step Taken

STATUS

An EEO Investigator was assigned and spoke with Mr. Kracklin and collected statements into the allegations. An investigation was completed and submitted to appropriate level management on May 5th. Based on the conclusion of the investigation, EEO found cause to substantiate the allegations in his complaint. EEO met with Mr. Kracklin and Management to resolve the complaint. An agreement was reached, and the complaint was resolved. Management did not sign off on the investigation summary until 5/12/XXXX <current year>.

The IT9834 record must be updated to reflect Mr. Kracklin’s complaint was resolved through the EEO Informal Inquiry.

10. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Informal Step Taken	Resolved, EEO Informal Inquiry
Date Informal Completed	May 12 th -<current year>
Comments	Edit > Maintain Text <your name> May 15, <current year> Per the EEO Informal Investigation, the North Carolina Department of Administration has agreed to reassign Mr. James C. Kracklin to another team effective June 1, <current year>.
To (delimit date)	Change 12/31/9999 to 5/12/<current year>

NOTE: A date must be recorded for **both** resolved and unresolved outcomes.


11. Click the **Enter**  button.

12. Click the **Save**  button.

EXERCISE 2.3: Create a Harassment (Sex) Grievance Record

SCENARIO

The Department of Cultural Resources, Equal Employment Opportunity (EEO) Office received a timely complaint filed on January 11th from Photographer Francine Amato (Female) against Exhibit Designer Randall Wright (Male) for inappropriate conduct and comments based on a sexual nature.

 **CAUTION** Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

PART A: Create IT9834 - Employee Grievance Data


Instructions

Infotype 9834 must be created in the system to track the grievance process.

ALLEGATIONS

In Ms. Amato's complaint, she stated that she was sexually assaulted on January 2nd when Randall Wright grabbed her hand and forced her to touch his genital area during a conversation they were having. Ms. Amato further alleged that Mr. Wright followed her to her office on the same day and attempted to put his hand down the front of her shirt.

You are currently on the SAP Easy Access screen.


1. Enter transaction code **PA30** in the Command field and click .
2. Enter the **personnel number** from the table below based on the student ID your instructor assigns you.

PERNR: FRANCINE AMATO							
A	80000631	F	80000636	K	80000641	P	80000646
B	80000632	G	80000637	L	80000642	Q	80000647
C	80000633	H	80000638	M	80000643	R	80000648
D	80000634	I	80000639	N	80000644	Inst 1	80000649

<i>E</i>	80000635	<i>J</i>	80000640	<i>O</i>	80000645	<i>Inst 2</i>	80000650
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- Click **Enter** on the keyboard to validate your entry.
- Complete the following fields:

Field	Value
Infotype	9834 - Employee Grievance Data
Subtype	03 - Harassment

- Click or press **Enter** on the keyboard to validate your entry.
- Click the **Create**  button to begin a new Grievance record.
- Complete the following fields:

Field	Value
Start	<i>January 11, <current year></i> CRITICAL: The Start Date is the date you create the first entry. Once this date is saved it cannot be changed.
End	Leave 12/31/9999
Action/Basis Boxes	Discrimination Basis <ul style="list-style-type: none"> Sex For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected. NOTE: The record will not allow you to save unless you have checked an item in the appropriate box.

Date of Alleged Event or Action	<p><i>January 2, <current year></i></p> <p>The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the timeframes for the entire grievance process.</p>
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8. Click or press **Enter**  to validate your changes.
9. Click the **Save**  button to save the record creation.

PART B: Change IT9834 - Informal Step Taken

STATUS

An EEO Investigator was assigned and spoke with Ms. Amato and collected statements about the allegation on January 13th. An investigation was completed and submitted to appropriate level management on January 30th. EEO did not find cause to substantiate the allegations in her complaint. She was sent a letter of no-cause and given her appeals rights.

The IT9834 record must be updated to reflect Ms. Amato’s informal discussion with her supervisor.

10. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Informal Step Taken	Unresolved, EEO Informal Inquiry
Date Informal Completed	January 30, <current year>

Remember: A date must be recorded for both resolved and unresolved outcomes.

11. Click the **Enter**  button.
12. Click the **Save**  button.

PART C: Change IT9834 - Date Formal Grievance Filed

STATUS

Ms. Amato was not satisfied with the results of the EEO Informal Inquiry Process and filed a Step 1 Grievance on February 2nd.

13. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Formal Grievance Filed?	Yes
Date Formal Grievance Filed	February 2, <current year>


REMEMBER: It is imperative that this field be completed with a Yes or No following the Date Formal Grievance Filed entry.

14. Click the **Enter**  button.

15. Click the **Save**  button.




PART D: Change IT9834 - Step 1 Result/Mediation


A mediation was held with Ms. Amato (Grievant) and Robert Jones, Management Representative (Respondent) on February 20th. The Respondent agreed to allow Ms. Amato to be reassigned, giving her minimal contact with Mr. Wright. A Memorandum of Agreement was signed and approved by Agency Management prior to leaving the mediation.

16. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 1 Result/Mediation	Resolution
Date Step 1 Completed	February 20, <current year>

Edit > Maintain Text	<p><your name> 2/23/<current year></p> <p><i>Per the Memorandum of Agreement, the Department of Public Safety, represented by respondent, Robert Jones, and the grievant, Francine Amato, reached a resolution allowing Ms. Amato to be reassigned to Unit 4.</i></p>
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17. Click the **Save**  button after entering the note.
18. Go to the **To** field at the top of the grievance record. Change the date from 12/31/9999 to **2/20/<current year>**.
19. Click the **Enter**  button.
20. Click the **Save**  button.
21. Click **Back** until you return to the SAP Easy Access screen.



REMEMBER: Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

INFORMATION

This exercise is complete.

Completion of Infotype

Completion of the remainder of the Employee Grievance Data infotype requires verifying for an appeal to OAH and then delimiting the record manually after confirmation or after the Final Decision is rendered by OAH.

Appealed to OAH?

OAH

Appealed to OAH?	<input type="text"/>	OAH Filing Date	<input type="text"/>	OAH Deadline	<input type="text"/>
OAH Case Number	<input type="text"/>	OAH Case Status	<input type="text"/>		
OAH Remand Back To Agency	<input type="text"/>	Remand Date	<input type="text"/>		
OAH Final Decision	<input type="text"/>	Decision Date	<input type="text"/>		

A grievant may appeal to OAH within 30 calendar days of receiving the FAD in cases where the grievable issue can be appealed. A grievant can also appeal to OAH after 90 calendar days from the formal grievance filing date if they do not receive a FAD, per policy.

OAH Final Decision

An Administrative Law Judge will conduct a hearing and render a Final Decision. The Final Decision will be one of the following:

Petitioner	FAD upheld/unchanged
Respondent	FAD reversed
Modified	FAD modified
Withdrawn	Petitioner chose to withdraw grievance. The grievance has ended.
Resolved Prior to Decision	Agreement reached before final decision. The grievance has ended.
Dismissed at OAH	Case was dismissed at OAH, e.g. untimely filing, lack of jurisdiction

The Decision Date is the date that the Final Decision was issued to the petitioner by the Office of Administrative Hearings.

Examples of Comments

Petitioner: No Comment needed

Respondent Comment:

S. Sally 9-16-19

OAH reversed the Disney Agency's FAD to uphold the dismissal issued on April 12, 2019. The grievant, Mickey Mouse, will be reinstated to his former position as Disney Character, effective October 1, 2019. Mickey Mouse will receive back pay and full benefits.

Modified Comment:

S. Sally 9-16-19

OAH modified the Disney Agency's FAD to uphold the 10-day disciplinary suspension without pay issued to the grievant, Mickey Mouse, on April 3, 2019 and reduced it to a five-day disciplinary suspension with pay. The grievant will be reimbursed for five days of disciplinary suspension without pay.

Withdrawn: No Comment needed

Resolved Prior to Decision Comment:

S. Sally 9-16-19

In a meeting before the OAH decision was rendered, the Disney Agency agreed to allow the grievant, Mickey Mouse, to resign for personal reasons in lieu of dismissal effective September 1, 2019.

Dismissed at OAH Comment:

S. Sally 9-16-19

OAH dismissed appeal filed by Mickey Mouse September 1, 2019 due to untimely filing.

Reporting

Grievance reports are in Business Objects (BOBJ). Access the related BOBJ reports by going to the following folder:

PA: Grievances folder

Title ^	Type
B0034: Employee Grievance Data	Web Intelligence
B0050: Grievance Data	Crystal Reports
B0057: Grievance Overview	Crystal Reports
B0059: Grievance Summary	Crystal Reports

DETAILED REPORTS


- **B0034 – Employee Grievance Data** - This report lists all Grievable Issues filed by active employees. It includes all associated detail for each grievance basis along with status information such as informal and formal steps taken. Provides jump to 'B0022: Comments.'

SUMMARY REPORTS

- **B0050 – Grievance Data** – This report lists all historical grievances (from infotype 0102) filed by active employees. It includes details such as when the grievance was filed, and the current status. Provides jump to 'B0022: Comments'. The data in this report will be used to track and report historical data in the Grievance process.
- **B0057 – Grievance Overview** – This report shows the total number of grievances (based on Grievance Count) and corresponding percent calculations. The counts and

percentages are broken down by processing steps for each of the four Grievable Issue types (Policy Violation, Discrimination, Harassment, and Retaliation).

- B0059 – Grievance Discrimination Summary** - This reports shows (by Agency, Gender, and Ethnicity) the number of grievances (based on Reason Count) and corresponding percent calculations for each type of Grievable Issue (Policy Violation, Discrimination, Harassment, Retaliation). Data will display for all four types of Grievable Issue only if there exists at least one grievance for each type of issue.

 INFORMATION	BOBJ Reports B0060, B0069, and B0071 have all been migrated into B0059 – Grievance Discrimination Summary.
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KNOWLEDGE CHECK

QUESTION	ANSWER
1. How often are agencies required to submit employee grievance reports to OSHR?	
2. Once the ___ is saved, it cannot be changed.	
3. The Start date is the date you ___.	
4. The ___ begins the time frames for the entire grievance process.	
5. In the Informal Step Taken, a date must be recorded for both ___ and ___ outcomes.	
6. The Formal Grievance must be filed within ___ calendar days of the Date of the Alleged Event or Action.	
7. In the Step 1/Result/Mediation ___ means no agreement was reached.	
8. A Step 2 Grievance must be filed within ___ calendar days of the mediation.	

9. A grievant may appeal to OAH within ___ calendar days of receiving the FAD in cases where the grievable issue may be appealed.	
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SUMMARY

In this lesson, you learned to:

- Enter grievance data as events occur.

This will enable you to:

- Submit employee grievance data to OSHR as requested.

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LESSON 3: COURSE REVIEW

Course Objectives

Upon completion of this course, you should now be able to:

- Define key terms and concepts,
- Describe the Integrated HR-Payroll System grievance processes,
- View, create, and maintain a grievance record, and
- Identify how to access the Grievance reports

Don't Forget!
<p>The State of North Carolina Employee Grievance Policy is reviewed and updated as changes in policy occur. Prior to implementing policy, students need to verify the most current changes by accessing updated materials at the following sites:</p> <ul style="list-style-type: none">• OSHR Policy Guide website• https://oshr.nc.gov/policies-forms/discipline-appeals-grievances/employee-grievance-policy• OSC HR-Payroll Training HELP website <p>https://www.osc.nc.gov/training/training_help_documents</p>

Integrated HR-Payroll System



Because the Integrated HR-Payroll System is an integrated system, entries made in one module affect other system components, such as an employee's time and pay.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how the Integrated HR-Payroll System looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

Listen as your instructor explains how the Personnel Administration module integrates with the other the Integrated HR-Payroll System modules.

Next Steps

- Monitor the Integrated HR-Payroll System communication
 - BEST Shared Services website (especially the Updates tab)
<https://www.osc.nc.gov/state-agency-resources/customer-service-hr-payroll>
 - Review conceptual materials
 - Access the Training HELP site
https://www.osc.nc.gov/training/training_help_documents
 - Practice what you've learned
<http://mybeacon.nc.gov>
 - Client 899
 - Use your current NCID user name and password

Want to practice what you have learned from your desk?

Follow the link provided above to access the training client on the Integrated HR-Payroll portal. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed online through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your competency assessment and your evaluation of today's class in the Learning Management System (LMS).

When you have completed the class, you may:

- Hang up the phone
- Exit the virtual classroom

CONGRATULATIONS!

You've completed the course!

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