What is HRA?

HRA stands for Human Resource Action. This is a web-based application used to request and track approval(s) of all human resource actions. As a requestor, you are the first step in a process that, if all approvals are granted, will result in one or more updates to the Human Resources system. University reporting data is reliant on the data submitted via HR Action, so complete and accurate requests are essential.

Key Reminders:

1. All university human resource requests should be submitted using HRA
2. HRA requests are not encrypted. Sensitive information should NEVER be included in comments or attached to HRA requests ie, social security numbers, medical information, driver’s license numbers, etc…
3. Information included in a HRA request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery
HR Action Levels of Access

The HR Action system comes with several levels of access for system users:

1. **Inquiry Access** – Ability to view and search for HRA’s based on department access, cannot make changes or submit requests
2. **Initiator Access** – Ability to create and submit HRA’s, and view all HRA’s submitted based on department access
3. **Supervisor Access** – Ability to submit HRA’s for own employee list, and view only own list of previously submitted requests
4. **First Level Approval Access** – First level approver after submission; this level is housed within the unit. May be responsible to complete unfinished information such as chartfield when required
5. **Second Level Approval Access** – Second level approver receives once First Level approver has approved request; this level is also housed within the unit. Some units do not use this level.
6. **Final Level Approval Access** – Final approver to review request before assigned for service center entry; this level is housed within the service center to allow for any necessary final changes prior to processing
7. **Service Center Access** – Ability to view all requests based on department access, but only access to change information in Comments and Service Center Activity section. This access is used for the HR service center and background check coordinators to record progress updates in requests
What Actions Can Be Submitted Using HRA

Person Actions:

• **Hire** – Final candidate has been selected. Includes new hires, rehires, promotions (excluding reclassification), concurrent positions, and transfers within the University

• **Terminate** – Includes resignations, retirements, involuntary terminations, and transfers out of department

• **Pay Additional Compensation** – Payments in addition to salary for employment arrangements (payroll approved payment types only)

• **Change Rate of Pay** – Increases or decreases in pay rate/salary amounts without changes to position

• **Change Funding Source** – Temporary and permanent chartfield and/or earnings distribution changes as well as Retro distribution changes

• **Change Number of Hours Worked Per Week** – Increases or decreases in standard hours/full-time equivalent (FTE) within same position

• **Update Job Duties/Responsibilities** – Includes reporting line/etimesheet/eleave approver changes, disaster designation changes, reclassifications, promotions, title changes, and job duties/description changes

• **Change Other Employee Data** – Includes department, webclock usage, leave/timesheet approver, business address, phone number

Position Actions:

• **Fill Existing Position** – Ready to advertise/recruit for a position that already exists; position description, job duties, responsibilities and requirements may need to be updated

• **Create New Position** – Position does not exist; create a new position to fulfill certain duties/responsibilities; position would then be ready to advertise/recruit

Anything Else:

• **Other** – Any HR action not previously described. Service dates updates, background/motor vehicle checks, supervisor updates when HRIS shows blank field, inactivating/activation position numbers, vacation donations, etc…
The Process
Knowing how your request will flow through the system is critical to understanding your role and what to expect. The benefits of this simple streamlined process allows for transparency, automatic record retention, University wide application and customization.

- **HRA Submitted**
  - Appropriate information and documentation attached

- **Unit HR – Level 1 and 2 Approvers**
  - Reviews HRA submission

- **SC HR Specialist – Final Approvers**
  - Reviews HRA – sends to HR Associate for entry
How do I create a HRA request?

The following slides demonstrate various types of transactions that can be submitted using HRA.
Creating a New Action Request Item

Actions within the HRA system may start with a new request.

In order to access the site, please go to: https://hraction.osu.edu/hraction/home.jsf and log in using your Ohio State Username and Password.

If you are having issues with your password, please contact the IT Service Desk at 614-688-HELP(4357) or use the self service website located at https://osuitsm.service-now.com/selfservice for assistance.

Once you are logged into the HRA site click:
Supervisor Contact Information

New HR Action Request

Note: If you are initiating a request for someone else, please click the Lookup link or type the requesting supervisor’s OSU ID in order to proceed with the request.

**Verify Department number corresponds with the desired unit department to ensure correct approver workflow.**
Supervisor Contact Information

The Preferences page can be utilized to customize HRA request(s).

HRA initiators can store a list of supervisors in the Supervisor Favorites section in order to help create the HR Action Request.

Click on Preferences on the taskbar to create HRA Supervisor Favorites.

Enter Supervisor’s ID Number, or use any of the Lookup options to locate supervisor.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Click Save to save preference selections.

Helpful Tip: If submitting HRA requests for multiple supervisors, HRA Preferences can be utilized in order to set supervisor favorites.
Supervisor Contact Information

New HR Action Request

Choose the appropriate supervisor from the drop down menu created for the HRA request being submitted

Supervisor information will automatically populate when selected

Supervisor Favorites can be utilized for any HRA Request Type.

If the supervisor information needs updated after the HRA type has been selected, utilize the drop down menu or use the Lookup function with the appropriate supervisor information.
HR Action Send Notification

The Preferences page can be utilized to customize HRA request(s).

HRA users can store a list email addresses to select from when using Send Notification in order to send communication regarding a HRA.

Click on Preferences on the taskbar to create a list of Send Notification Email Addresses.

Helpful Tip: Send notification emails from HRA can not be found in Outlook sent items. Remember to include your email address in the recipient’s email field in order to receive a copy of the email.

Remember to click Save to save preference selections.
HR Action - Ad-Hoc Approvers

The *Preferences* page can be utilized to customize HRA request(s).

HRA users can store ad-hoc approvers to any HRA request type when additional approval(s) are needed.

Click on *Preferences* on the taskbar to create a list of ad-hoc approvers per HRA Request Type.

**Helpful Tip:** Be aware that once an Ad-Hoc Approver is added, the request will not continue in the approval workflow until that specific Ad-Hoc Approver approves the request. Ad-Hoc Approver(s) will automatically receive an email notification when the request is saved.

**Note:** Current Level 1 HRA approvers can not be utilized as an Ad-Hoc Approver.
HR Action - Ad-Hoc Approvers

Enter Ad-Hoc Approver’s Employee ID Number, or use any of the Lookup options to locate supervisor.

Verify Department number corresponds with the desired unit to ensure correct approver workflow.

Click Save to save preference selections.
HR Action – Common Fields

Each HRA Request Type has common fields:

Additional Information, Attachments, Chartfield Information

These fields are used in the same fashion regardless of HRA Request Type

Reminder: Please do not attach any information containing restricted data to HRA
Save, Review and Submit!

If you are not yet ready to submit the HRA Request for approval, you may return to the HRA later by clicking Save For Later.

Once you are ready to submit the HRA for approval, please click Save and Continue and then Submit.

You must formally submit the HRA before it can be approved or move into workflow. You will notice the following warning at the top of the HRA:

HR Action - Hire - Preview

- Hire Request saved, but will NOT be submitted until you click the "Submit" button below.
HR Action Request – Confirmation

Confirmation!!

After each HRA is submitted for approval, you will receive a confirmation noting the HRA# along with the approvers listed for the request.

Note: Certain HR Action Request Types will workflow to the department HR approver and then to the Service Center for final approval and processing. If changes or additions are needed after submitting, Send Notification can be used to contact your HR Service Center representative.
HR Action Request –Search

Log in to http://hraction.osu.edu

Click on Search for Existing HR Action Requests

Once a HRA has been created and generated a HRA#, you may search for the request number or enter search parameters based on the fields provided in order to finalize details of the request or simply see the status of the request.

HR Action - Hire

HRA# 412758  Request Status COMPLETE

Completion Date 04/28/2016 8:30 AM

Completed By: Gluck, Stephanie Lauren
Selecting an Action

For further information regarding each action, please hover your mouse over each action.

Detailed information regarding the action will populate on the right.

Select the appropriate action, then click next.

**Please note: The type of action selected determines the approval workflow of the request.**
Log in to [http://hraction.osu.edu](http://hraction.osu.edu)

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type **Hire**.

This HR Action type is used for:
**Final candidate has been selected for hire and offer letter is signed, if applicable**
*New hires, Rehires, Concurrent Positions, Promotions (excluding reclassifications), and Transfers within the University*
Enter hire information into the data fields provided in the HRA.

- Although there are only a few required fields (*), providing more information upon submission will expedite the approval process.
  - Unit approvers (level 1 & 2) are able to enter additional information in HRA fields before sending to the HR Service Center for final approval.
  - The service center will be in contact to gather additional information, when necessary, prior to final approval and processing the request.
- Certain fields (ex. Employee department and standard hours) default based on the position number, but these can be overridden, if changes are needed.

Any information pertaining to the hire can be placed in the ‘Additional Information’ section of HRA. This may include, but is not limited to:

- Additional Background Checks beyond OSU requirements (e.g. motor vehicle, credit, fingerprint, etc.)
- Concurrent appointment information
- Phone number and type for new hires without active OSU accounts
- Position updates needed since creation/posting
- Notes to assist with hire entry

Attachments may include:

- Signed letter of offer
- Signed appointment document (used for grad student appointments)
- Signed Federal Work Study referral form
- Memorandum of Understanding (MOU)
- Minor Documentation
- Resume with contact information
- Approved exceptions to regular processes (posting, pay rate, etc.)
- Any other explanation correspondence, approval emails, or additional documents that will be helpful for future records and audit
Confirm pay frequency for job code and divisibility (monthly=12, FT biweekly=2,080 hours)

Check Temp if appointment is ≤ 12 months and enter end date, if available

If position was posted, revisit Create New/Fill Existing HRA and click the 'Ready to Hire' button at the bottom of the HRA to auto-fill position data

Enter supervisor ID or use the lookup link to search by name for eTime/eLeave approval

Select the department number to align with funding and/or reporting needs

Please enter standard hours for appointment. For students appointments, please review student appointment guide for student standard hour restrictions

Enter best email address for new hire process correspondence

Staff and Faculty positions require posting based on OHR policy 4.10 and will include a job requisition number. Temporary positions, including student position, will not have a requisition number
**Key Information to Keep in Mind for Student Hires**

NOTE: Please provide at least 10 business days for student hires when background checks are required

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**HR Action Request - Hire**

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### Undergraduate Student Appointments

<table>
<thead>
<tr>
<th>Student Classification</th>
<th>Enrolled Terms Maximum hours</th>
<th>Off Term &amp; Breaks Maximum hours</th>
<th>Pay Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Assistant - Domestic</td>
<td>20</td>
<td>58</td>
<td>$8.10 - 13.00</td>
</tr>
<tr>
<td>Student Assistant - International</td>
<td>20</td>
<td>38</td>
<td>$8.10 - 13.00</td>
</tr>
<tr>
<td>Federal Work Study Student Assistant</td>
<td>20</td>
<td>Off Term - N/A</td>
<td>See FWS Pay Range</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Breaks - 38</td>
<td>LBI</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Approved required to work up to 38 FWS hours, service center will send notification from FWS Office leading up to each break.</td>
<td></td>
</tr>
<tr>
<td>Student Intern</td>
<td>28 Domestic / 20 International</td>
<td>38</td>
<td>Varies by program</td>
</tr>
<tr>
<td>Non-OSU Student Assistant</td>
<td>20</td>
<td>38</td>
<td>$8.10 - 13.00</td>
</tr>
<tr>
<td>Undergraduate Trainee/Fellow</td>
<td></td>
<td></td>
<td>Varies by program</td>
</tr>
</tbody>
</table>

### Graduate Student Appointments

<table>
<thead>
<tr>
<th>Student Classification</th>
<th>Enrolled Terms Maximum hours</th>
<th>Off Term Maximum hours</th>
<th>Pay Range Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate Associates</td>
<td>20</td>
<td>N/A</td>
<td>Minimum stipend $13,500 for 50% FTE for 9 month appointment plus for other FTE %</td>
</tr>
<tr>
<td></td>
<td>1 or &gt;2 total hours required School approval, Combined total of 30 hours is max that may be approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Associates</td>
<td>N/A</td>
<td>38</td>
<td>Equivalent to GA rate for same level of work, or use Student Assistant for lower level of work</td>
</tr>
<tr>
<td></td>
<td>Appointment should only be used to bridge the off term for GA positions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graduate Fellows</td>
<td>** Fellows are not OSU employees and cannot perform work for OSU without an approved concurrent employment role **</td>
<td>Varies by program</td>
<td></td>
</tr>
</tbody>
</table>

* For Professional programs, approved concurrent employment must be approved by the Graduate School prior to assigning work.
** Concurrent employment roles for Graduate Fellows must be approved by the Graduate School prior to assigning work.

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Helpful Resources:

http://hr.osu.edu/public/documents/policy/policy1010.pdf
The presence of the Federal Work Study referral form is confirmation that the student has a work-study award.

You may choose any rate within the range displayed on the referral form that corresponds with the work category selected for the position.

Please ensure that all required fields are completed and are reflected appropriately in the provided fields in the HRA hire request.
HR Action Request - Hire

Graduate Associate Appointment Document

This document gives important information about your graduate associate (GA) appointment but does not supersede applicable Graduate School policies, university rules, or federal and state laws, which change from time to time. Graduate students and graduate programs should consult the Graduate School Handbook, particularly Section 9, for Graduate School rules and policies pertaining to graduate associates.

Student’s name:
Student’s academic unit (graduate program):
Appointing unit:
Unit’s address:
Unit contact person:
E-mail address/telephone number:
Appointment title(s):
  - Graduate Research Associate
  - Graduate Administrative Associate
  - Graduate Teaching Associate

Non-native English speakers assigned as GTAs must be certified in spoken English (Graduate School Handbook section 2.7). If the student has not been certified, please contact the Spoken English program.

Certified: [Yes] [No] [N/A]

Average work load (hours/week): [ ]
Full-Time Equivalent (FTE): [ ] %

Estimated monthly stipend: $ [ ] X [ ] Months = Estimated Total Stipend $ [ ]

Tuition and Fees: GA appointments of at least 50 percent FTE include full tuition and fee authorization covering all instructional and general fees, including nonresident fees, and the learning/technology fee. The university also subsidizes the cost of Student Health Insurance plan for eligible individuals at 85 percent of the premium. GA appointments at 25 percent FTE include one-half of instructional and general fees, including nonresident fees and one-half of the learning/technology fees. GA appointments at 25 percent FTE do not include the health insurance subsidy.

Note: The Office of Human Resources has implemented a Payroll Deduction Plan for graduate students supported as graduate associates, graduate fellows, and graduate trainees who are paid through the university payroll system. This plan deducts “Other Student Fees” from the GA’s monthly stipend.

Appointment period:
HR system appointment dates:
From [ ] to [ ]
Dates of work performed:
From [ ] to [ ]
HR Action Request Guide - Termination

Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type Terminate

This HR Action type is used for:
Termination of appointment or notification that employee is transferring within the University. Types of terminations include:
- Resignation – Leaving University
- Resignation – Transfer within University
- End of Student/Temporary Appointment
- Retirement
- Death
- Involuntary
- Reduction in Force
- Disability/Separation
HR Action Request - Termination

**Termination Example**

Enter the **Employee OSU ID Number** into the appropriate field. This will bring up the employee’s information.

If the Employee ID is unknown, the 'Lookup' link is available to search by name.

If employee has multiple records, please select the appropriate record number.

Enter the **Last Day of Work**.

**Select** the Reason for Termination by clicking the arrow to open the menu and choosing the most appropriate option.

Please work with your unit HR team for any involuntary terminations.
**HR Action Request - Termination**

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**Attachments may include:**
- Letter of resignation
- Pre-approved OHR Reduction in Force documents
- Memorandum of Understanding
- Pre-approved OHR notification to employee regarding termination
- Obituary, if available
- Letter to employee confirming termination
- Grad School approval for grad students who are terminating prior to the end of their contract
- Any other explanation correspondence or additional documents that will be helpful for entry

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**Note:** Voluntary terminations are automatically approved and sent to the Service Center for processing.

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**Voluntary terminations** are automatically approved and sent to the Service Center for processing.
HR Action Request Guide - Pay Additional Compensation

Log in to [http://hraction.osu.edu](http://hraction.osu.edu)

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type **Pay Additional Compensation**.

This HR Action type is used for:
Additional compensation outlined in an employment agreement for students, staff and faculty, including:
- Supplemental compensation, Cell phone/internet reimbursements, Bonuses (aside from AMCP), Staff awards, Administrative attachments, Off duty pay,
- Approved living expenses
HR Action Request - Pay Additional Compensation

**One Time Payment**

- **For biweekly employees/Graduate Students**, please provide hours worked and hourly rate in the **Additional Information** section. This is important for Fair Labor Standards Act (FLSA) reporting.
- Please be sure to select appropriate compensation frequency.
- Select the appropriate payment type from the drop down menu.
- Effective date should reflect beginning of pay period in which payment will be processed or work was performed. See **pay period calendar** for assistance or contact your HR Service Center Representative.
- Total amount of payment: Enter Employee ID or use Lookup to search by name

**Multiple/Recurring Payments**

- **Begin and End dates** should reflect beginning and ending dates of pay periods in which payment will be processed or work was performed. See **pay period calendar** for assistance or contact your HR Service Center Representative.
- Please list amount per pay period and number of pay periods related to payment.
- Please ensure total amount listed equals the amount employee is to expect.
- **Begin Date** and **End Date**
- **Amount per Pay Period**
- **X Number of Pay Periods**
- **Total Amount**
- **Please click in order to populate chartfield information fields**

For biweekly employees/Graduate Students, please provide hours worked and hourly rate in the **Additional Information** section. This is important for Fair Labor Standards Act (FLSA) reporting.
HR Action Request – Pay Additional Compensation

Payment for work outside scope of position:
- **Supplemental Pay** – short term project/duties that are outside the scope of the existing role. Full-time faculty & staff are eligible for this payment type.
- **Additional Pay** – short term project/duties that are outside the scope of the existing role or cannot be paid through regular timekeeping practices. Part-time faculty, staff & students are eligible for this payment type.

Cell Phone or Internet Allowance:
- Payment for cell phone and/or internet expenses. Staff & faculty are eligible for payment. Payment must follow calendar year (January-December)

Non-cash item:
- Used to document taxable gifts, awards, gift cards, and any other non-cash items given to employees as outlined in Expenditures policy. Chartfield will match the employee’s wages; it is applied to gross income, but will not generate a payment

Off Duty Pay:
- Payments for work performed during off duty period and eligible dates for 9/12 month faculty members

Staff Award:
- Payment of an award based on an approved Rewards & Recognition program

Bonus:
- One-time payment as an incentive based on performance or accomplishment in employee’s role

Other:
- **Differential Pay** – Payment for shift differentials
- **Faculty Administrative Attachment** – payment for major administrative assignments (Chair of Committee, Director of program, etc.) Eligible faculty members can receive this payment type.

For Additional Pays involving sponsored research funding, please make sure that the grant permits for additional pay compensation.
HR Action Request – Pay Additional Compensation

**One Time Payment Example**

- **Employee's Pay Frequency**: BIWEEKLY
- **Number of pay periods**: 26
- **Effective Date**: 03/06/2016
- **Total Amount**: 50

**Multiple/Recurring Payments Example**

- **Employee's Pay Frequency**: MONTHLY
- **Number of pay periods**: 12
- **Begin Date**: 03/01/2016
- **End Date**: 06/30/2016
- **Amount per Pay Period**: 100

**Payment Type**: Payment for work outside scope of the position

- **Total Amount**: 400.00

**Effective/End dates reflect beginning and end dates of pay periods**
Please click on the ‘Add’ button to attach any necessary documentation to the HRA prior to submission. Types of documentation per payment type include:

- Supplemental Compensation – Supplemental Compensation form with signatures of approval (or electronic Ad Hoc approval through HRA system).
- Cell Phone/Internet Reimbursement – Cell Phone/Internet Allowance Request form with appropriate signatures of approval.
- Faculty Administrative Attachment – Letter of offer or Memorandum of Understanding (MOU) that details the payment amount and date range.
- Staff Awards – Documentation or explanation of the approved award or rewards/recognition program, and letter to employee with award amount.
- Bonus – Detailed reason for bonus and documented rewards program when available. For any bonus amount over $1,000, please attach Salary Adjustment and Reclassification Request form.

If additional approvals are needed, the Ad-Hoc feature can be used. You may also inform the Service Center in the Comments section of the HRA with the employee name/ID# that should be Ad-Hoc’d on the HRA for additional approval(s).
HR Action Request Guide - Change Rate of Pay

Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type Change Rate of Pay.

This HR Action type is used for:
Increases or decreases to employees’ salary or hourly rate within the same position. Types of changes include:
- Counter offers, Equity/market adjustments,
- Performance related increases aside from AMCP,
- Student pay rate increases for performance or increased responsibility, Other increases that do not include changes in position data
**HR Action Request - Change Rate of Pay**

To process multiple changes, check this box and attach a list of **student** employees with desired new pay rates.

For single changes, enter Employee ID or use Lookup to search by name.

Enter the effective date. Please review pay period calendar for assistance or contact your HR Service Center representative.

If chartfield information needs to be changed, please click on this button and make comment regarding change in ‘additional information’.

If an employee has multiple active positions, select the desired job record that requires a change in pay.

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<table>
<thead>
<tr>
<th>Record Number</th>
<th>Job Title</th>
<th>Supervisor</th>
<th>Dept</th>
<th>Dept Name</th>
<th>Work Location</th>
<th>Hours Per Week</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Library Student Assistant 1</td>
<td>Miller, James I.</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>10</td>
<td><img src="select.png" alt="select" /></td>
</tr>
<tr>
<td>1</td>
<td>Library Student Assistant 1</td>
<td>Gosha, David T.</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>10</td>
<td><img src="select.png" alt="select" /></td>
</tr>
<tr>
<td>2</td>
<td>Student Assistant</td>
<td>Richman, David B.</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>8</td>
<td><img src="select.png" alt="select" /></td>
</tr>
</tbody>
</table>
HR Action Request - Change Rate of Pay

Please select a job from the list below:

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Job Title</th>
<th>Supervisor</th>
<th>Dept</th>
<th>Dept Name</th>
<th>Work Location</th>
<th>Hours Per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Library Student Assistant</td>
<td>Goshka, David Theron</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>10</td>
</tr>
<tr>
<td>1</td>
<td>Student Assistant</td>
<td>Richman, David Bozwell</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>10</td>
</tr>
</tbody>
</table>

The system will present the current rate of pay based on the employee ID and job record.

Please click on the button to attach any necessary documentation to the HRA prior to submission. This may include:

- **Salary Adjustment and Reclassification Request Form** (counter offers, equity/market adjustments)
- Internal/External Market Data
- Letter to employee confirming new rate of pay. Template letters can be found on the [OAA Service Center website](#).
- Outline of wage information provided by the government/Office of International Affairs

**Reminder:** Please do not attach any information containing **restrictive data** to HRA.
Note: If an employee has multiple records, please ensure that the correct record is selected for the change rate of pay.

Once the appropriate record is selected, the current rate of pay will automatically populate.
Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type **Change Funding Source**.

This HR Action type is used for:
**Current/Future Funding Source Changes & Retroactive Funding Source Changes,**

If a more significant change is driving the funding change, such as a promotion, reclassification, transfer, etc., please use the best available HR Action request type and include the new funding information in the space provided.


### HR Action Request - Change Funding Source

**Current/Future Distributions**

- **To process multiple changes,** check this box and attach a list of employees with new desired funding source.

- **For single changes,** enter Employee ID or use Lookup to search by name.

- **Select current/future distributions** to request future-dated changes and current pay period changes if payroll has not yet processed. See payroll processing calendar for assistance.

- **Enter the effective date.** Please review pay period calendar for assistance or contact your HR Service Center representative.

#### Current/Future Distributions

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Job Title</th>
<th>Supervisor</th>
<th>Dept</th>
<th>Dept Name</th>
<th>Work Location</th>
<th>Hours Per Week</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>NSF Graduate Research Fellow</td>
<td>Eckstrand Katherine L</td>
<td>30000</td>
<td>Graduate School Administration</td>
<td>University Hall</td>
<td>0.1</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Graduate Supplemental Fellow</td>
<td>Eckstrand Katherine L</td>
<td>30000</td>
<td>Graduate School Administration</td>
<td>University Hall</td>
<td>0.1</td>
<td></td>
</tr>
</tbody>
</table>

- **If an employee has multiple active positions,** select the desired job record that requires a change in funding.

#### Funding Source Changes

**Current Funding Source** - Only select row(s) to be changed.

<table>
<thead>
<tr>
<th>From Org</th>
<th>From Fund</th>
<th>From Account</th>
<th>From Project</th>
<th>From Program</th>
<th>User Defined</th>
<th>Percent</th>
<th>Amount</th>
<th>Release Time</th>
<th>Funding End Dt</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>011000</td>
<td>80044</td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td>0</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**Proposed Funding Source**

Enter chartfield by Percentage

<table>
<thead>
<tr>
<th>Org</th>
<th>Fund</th>
<th>Account</th>
<th>Project</th>
<th>Program</th>
<th>User Defined</th>
<th>Percent</th>
<th>Release Time</th>
<th>Funding End Dt</th>
<th>Split Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The system will present the existing funding source(s) based on the employee ID number and job record selected. Click the check box next to the chartfield(s) you would like to change.

- Enter new funding chartfield(s) and confirm combined percentages equal 100%.

- To add more chartfield rows, please click “+”.

HR Action Request - Change Funding Source

When dealing with **General** to **FWS** or vice versa funding, please enter *Hire* HRA and attach signed FWS referral form if moving from General to FWS funding.

This helps verify that:
- student is in correct position
- student is being paid at the correct hourly rate
- correct approval is received if changes are needed

```
From 60131 + To 60155 = Hire HRA
From 60155 + To 60131 = Hire HRA
```
HR Action Request - Change Funding Source

Retroactive Distributions

To process multiple changes, check this box and attach completed Direct Retro Distribution calculator.

Enter Employee ID or use Lookup to search by name.

Select retroactive distribution to process changes for salary expenses that have already been paid/processed.

Enter the begin and end dates for the posted wages that need to be transferred to a new funding source.

Please note – biweekly pay period effective dates will not align with the monthly GL report dates. Please review pay period calendar for assistance.

If an employee has multiple active positions, select the desired job record that requires a change in funding.

The system will present the existing funding source(s) for each pay period contained within the date range for the employee selected. Please review to identify the necessary changes.
### HR Action Request - Change Funding Source

#### Proposed Funding Source

**Move Expense From** (only rows being changed need to be entered)

<table>
<thead>
<tr>
<th>Org</th>
<th>Fund</th>
<th>Account</th>
<th>Project</th>
<th>Program</th>
<th>User Defined</th>
<th>Amount</th>
<th>Release Time</th>
<th>Split Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>42016</td>
<td>011000</td>
<td>60044</td>
<td>Lookup</td>
<td>Lookup</td>
<td>Lookup</td>
<td>1500</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Move Expense To** (only rows being changed need to be entered)

<table>
<thead>
<tr>
<th>Org</th>
<th>Fund</th>
<th>Account</th>
<th>Project</th>
<th>Program</th>
<th>User Defined</th>
<th>Amount</th>
<th>Release Time</th>
<th>Split Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>42015</td>
<td>011000</td>
<td>60044</td>
<td>19753</td>
<td>DAA</td>
<td>Lookup</td>
<td>1500</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The ‘from’ chartfield(s) should match the funding source(s) returned for the pay periods within the selected date range that were charged for the original salary expense.
- The ‘to’ chartfield(s) should reflect the funding source(s) that will incur the salary expense.
- Please make sure the Amount fields are completed in both the ‘from’ and ‘to’ sections, and the total amounts match.

---

**Retroactive Distributions**

- **Click** to attach **DRD calculator** for multiple employee retro funding changes or spreadsheet containing current/future changes.

- For single employee changes, attachments are optional and may include any supporting documentation to be linked for audit review or department record retention needs.
HR Action Request - Change Funding Source

Retroactive Distributions

Questions will automatically populate for retro changes involving the Office of Sponsored Programs (OSP) funding. Please be sure to answer these questions in order to further process the transaction.

For requests involving funding changes over 90 days ago, please be sure to provide a justification in order for OSP to approve the request.

NOTE: Change Funding Source requests do not go through approval workflow and cannot include ad hoc approvals. If a change needs to be made after the request is submitted, please contact the HR Service Center.
Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type **Change Number of Hours Worked Per Week**.

This HR Action type is used for:
**Changes in number of hours worked weekly for staff, faculty or student employees, when no additional changes in position are required, including:**
- Change from full-time to part-time and vice versa; standard hours changes
HR Action Request - Change Number of Hours

Is this request for multiple employees?  

To request multiple employee changes, please check this box and attach a list of student employees or spreadsheet with changes needed.

Employee / OSU ID  

Name (Last,First)  

Lookup  

For single changes, enter Employee ID or use Lookup to search by name.

Proposed Hours Per Week  

or % FTE  

State proposed hours per week or % FTE (full-time equivalent) for employee.

Effective Date  

Enter effective date of change. Biweekly employee data changes will be effective the next available pay period begin date. See pay period calendar for assistance.

Please select a job from the list below:

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Job Title</th>
<th>Supervisor</th>
<th>Dept</th>
<th>Dept Name</th>
<th>Work Location</th>
<th>Hours Per Week</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Library Student Assistant 1</td>
<td>Gosh, David Tharan</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Student Assistant</td>
<td>Robinson, David Bozwell</td>
<td>32101</td>
<td>Research and Education</td>
<td>Eighteenth Avenue Library</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

If an employee has multiple active positions, select the desired job record that requires a change in funding.

Student changes in hours are important for the Affordable Care Act reporting. Please send in change requests when a student submits notification of schedule changes that will alter their weekly standard hours.
Change in Number of Hours worked per week for Faculty/Staff is used when no additional changes in position are required. If an employee is transferring to a new position or adding a concurrent position, please use Hire HRA type.

For monthly employees, the monthly rate is tied to the standard hours and will therefore include a change in the monthly salary.
HR Action Request Guide – Update Job Duties/Responsibilities

Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type **Update Job Duties/Responsibilities**

This HR Action type is used for:
Changes to employee’s job description, including the following:
- Reclassifications
- Career Progressions
- Addition or Permanent or Interim Duties
- Job Description updates
- Disaster Designations
- Working Title Changes
Other pay rate changes that do not include changes to the position description should be processed using Change Rate of Pay HRA.

Required documentation may include:
- Salary Adjustment and Reclassification Request for Approval (including the required documentation listed on page 2)
- OHR Compensation approval on the HRA request
- OAA Position Template noting changes to employee’s position description
- Justification for change, if not noted in ‘additional information’
- Salary notification letter to employee confirming change (must be attached after OHR approval is received)
- Spreadsheet containing list of changes needed

To determine whether a position change qualifies for a reclassification or requires a job posting, please review the Recruitment & Selection policy.

Effective date should reflect the date in which change should occur. Select disaster designations from the drop-down menu. See HR Policy 6.17 for assistance.

Enter supervisory ID or use the lookup link to search by name. In most situations, the Reports to and eLeave/eTimesheet approver are the same person.

Check this box to add webclock functionality. Webclock requires an In/Out punch at the start/end of each shift to track hours.

Enter percentage adjustment or proposed new pay rate. See below.

Note: there is a 30 character limit.
Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type Change Other Employee Data.

This HR Action type is used for:
Employee data changes for an individual employee or a group of employees, including:
- Supervisor Changes
- Addition or removal of Webclock functionality
- Business address or phone number changes
- Department Number
HR Action Request Guide – Change Other Employee Data

Please complete only the fields that apply to the data changes you wish to make.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this request for multiple employees?</td>
<td>To request multiple employee changes, please check this box and attach a list of employees or spreadsheet with changes needed.</td>
</tr>
<tr>
<td>Employee / OSU ID</td>
<td>Enter employee ID or use Lookup to search by name.</td>
</tr>
<tr>
<td>Name (Last,First)</td>
<td>For single changes, enter Employee ID or use Lookup to search by name.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Enter effective date of change. Biweekly employee data changes will be effective the next available pay period begin date. See pay period calendar for assistance.</td>
</tr>
<tr>
<td>Dept</td>
<td>Enter new department number here. Please determine whether new chartfield information is also necessary.</td>
</tr>
<tr>
<td>Employee ID</td>
<td>Enter supervisor ID or use the lookup link to search by name.</td>
</tr>
<tr>
<td>Name (Last,First)</td>
<td></td>
</tr>
<tr>
<td>Leave/Timesheet Approver</td>
<td></td>
</tr>
<tr>
<td>WebClock User</td>
<td>Check this box to add webclock functionality. Webclock requires an In/Out punch at the start/end of each shift to track hours.</td>
</tr>
<tr>
<td>Work Address</td>
<td>Please enter building address with room number and business phone number when available for Find People Directory updates.</td>
</tr>
<tr>
<td>Work Phone</td>
<td></td>
</tr>
<tr>
<td>University Cell Phone</td>
<td></td>
</tr>
<tr>
<td>University Pager</td>
<td></td>
</tr>
</tbody>
</table>

**Note** - If funding source is the only change, please use the Change Funding Source HRA type.

Change Other Employee Data requests do not go through approval workflow and cannot include ad hoc approvals. If a change needs to be made after the request is submitted, please contact the HR Service Center.

For correction or changes to Social Security Number, Name or Date of Birth, please use Change of Record Form and send completed form directly to Payroll Services (noted on form).
HR Action Request Guide – Create New Position

Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type Create New Position.

This HR Action type is used for:
Department has identified a need for a new position rather than an update to an existing available position.
Creating new staff, faculty and student positions to fulfill a need within the unit when an existing position is not available.
Identify desired working title. Note: there is a 30 character limit in our HR system.

Enter start date as agreed in offer letter. If start date will depend on hiring process completion (background check & I-9), please note in Additional Information. If staff/faculty position is temporary (≤ 12 months), check box and enter end date.

Enter hiring range and frequency. Reference OHR’s Title Deck for designated pay grades by job code.

The primary position responsibilities will be necessary in order to select the appropriate University job code. OHR’s Title Deck contains a list of available job codes along with specifications. Contact your HR representative or the OHR Compensation Department for assistance with your selection or position description.

Click here to utilize OHR’s Title Deck for assistance with determining the appropriate job code, pay range, exempt status, etc. Please contact your unit HR representative or the OHR Compensation Department for additional guidance.

In order to post a position with a Preferred Internal Candidate, the preferred employee must meet the following Criteria:
1. Currently employed within same department as vacant position
2. Currently in a Regular or Term appointment (not Temporary)
HR Action Request – Create New Position

Information in this request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery.

Additional Information (Funding, Posting Details/Duration, Applicant Manager, etc.)

Please provide any additional information pertaining to the position and/or posting to supplement the attached position template document.

Although chartfield information will not be charged until the position is filled, the org (department) and fund must be defined in order to create the position. Click here to expand for entry.

Org/Department number is used for various reporting, access, and HR functions. For assistance with identifying the correct funding source, please contact your HR department.

For more information and helpful tips regarding position descriptions, please see OHR's Talent Management job aids and resources.

Please see the OAA Payroll & Transaction Calendar for weekly position update and job opening deadlines.

Click  to attach completed OAA Position Template to provide the position description details and desired posting information. If multiple positions (with same description) will be needed, please note the total number in the ‘additional information’ section.
HR Action Request – Create New Position

The **OAA Position Template** is a tool created to assist in the collection of position and job opening information required for system entry. Please complete the document in its entirety and attach to the HRA.

**Additional Information** may be added to the HRA to supplement the form and communicate details with your Service Center representatives.

**Appointment Type Details:**
- **Regular** = ongoing appointment
- **Temporary** = 12 months or less
- **Term** = longer than 12 months, but not longer than 3 years
HR Action Request Guide – Fill Existing Position

Log in to http://hraction.osu.edu

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type Fill Existing Position.

This HR Action type is used for:
Position has been vacated and will need to be replaced with a new employee through the posting process, whether the title and description will be staying the same or being revised.

Updating an existing position, that has been or will soon be vacated, to prepare for a replacement. Requests will also include details for a job posting when necessary.
**HR Action Request – Fill Existing Position**

**Fill Existing Position Detail - Please supply as much information as possible**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee / OSU ID</td>
<td>Name (Last, First)</td>
</tr>
<tr>
<td><strong>Employee Being Replaced</strong></td>
<td><a href="#">Lookup</a></td>
</tr>
<tr>
<td>Proposed Start Date</td>
<td>Enter proposed start date for replacement; actual start date subject to recruiting process</td>
</tr>
<tr>
<td>Proposed Hiring Range</td>
<td>From $ to $ with designated pay grades by job code.</td>
</tr>
<tr>
<td>Position Number</td>
<td>Enter position number, if applicable. (See criteria)</td>
</tr>
<tr>
<td>Preferred Internal Candidate</td>
<td>List preferred candidate name, if applicable. (See criteria)</td>
</tr>
<tr>
<td>Reports To</td>
<td>Employee ID of position's manager. Will default based on existing position data.</td>
</tr>
<tr>
<td></td>
<td>Lookup link available to search by name, if changing</td>
</tr>
</tbody>
</table>

Enter Employee ID or use Lookup to search by name. If requesting after employee has transferred to a new OSU position, leave this field blank and enter the Position Number below.

In order to post a position with a **Preferred Internal Candidate**, the preferred employee must meet the following criteria:
1. Currently employed within same department as vacant position
2. Currently in a Regular or Term appointment (not Temporary)

Click here to utilize **OHR's Title Deck** for assistance with determining the appropriate job code, pay range, exempt status, etc. Please contact your unit HR representative or the OHR Compensation Department for additional guidance.
HR Action Request – Create New Position

Information in this request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery.

Additional Information (Funding, Posting Details/Duration, Applicant Manager, etc.)

Please provide any additional information pertaining to the position and/or posting to supplement the attached position template document.

Org/Department number is used for various reporting, access, and HR functions. For assistance with identifying the correct funding source, please contact your HR department.

For more information and helpful tips regarding position descriptions, please see OHR’s Talent Management job aids and resources.

Please see the OAA Payroll & Transaction Calendar for weekly position update and job opening deadlines.

Click to attach completed OAA Position Template to provide the position description details and desired posting information. If multiple positions (with same description) will be needed, please note the total number in the ‘additional information’ section.
The OAA Position Template is a tool created to assist in the collection of position and job opening information required for system entry. Please complete the document in its entirety and attach to the HRA. If no changes are needed in the description, duties and/or education/experience sections, please note on the form.

Additional Information may be added to the HRA to supplement the form and communicate details with your Service Center representatives.

Appointment Type Details:
- Regular = ongoing appointment
- Temporary = 12 months or less
- Term = longer than 12 months, but not longer than 3 years
HR Action Request – Ready to Hire

Log in to [http://hraction.osu.edu](http://hraction.osu.edu)

Click on Search for Existing HR Action Requests

When a final candidate has been selected for a position and offer letter is signed, the candidate is **Ready to Hire** through HRA.

In order to view the position number that was created, enter the HRA number and click Search.
HR Action Request – Ready to Hire

Service Center Activity lists detailed information related to the HRA request that was entered into the HR System (PeopleSoft).

Contains information from HRA request.

Position number is created detailing the position information requested on the HRA.

Job Opening ID is listed if position was requested to be posted.

Click when final candidate has been selected for position. Action is found at the very bottom of the HRA request.
Hire HRA will automatically generate detailing the position information including the position number as well as the job requisition number.

A comment is created in this request referencing the HRA# of the original request.
Log in to http://hraction.osu.edu
Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type Other.

This HR Action type is used for:
Those items that do not fit into other categories, but require department approval. This action type is most frequently used for:
- Background checks, Motor Vehicle checks, Service Date adjustments, Vacation donations, Payroll pre-approved bulk additional pays (large group of 50+ lines), Leave of Absences or Return from Leave entries needed
HR Action Request - Other

To process multiple changes/requests, check this box and attach a list of employees along with requested information. This can be used for background/motor vehicle check requests.

For single changes/requests, enter Employee ID or use Lookup to search by name.

Enter the effective date. Please review pay period calendar for assistance or contact your HR Service Center representative. Not needed for background check requests.

Provide any additional comments and/or explanation to assist in entry for request/change.

If chartfield information is changing, please click in order to populate chartfield information fields.

Please note change in ‘Additional Information’ section.

Supporting documentation may include:
- Vacation Donation Agreement with appropriate approvals
- State of Ohio letters confirming previous years of service
- Spreadsheet containing background/motor vehicle checks needed
- Payroll pre-approved bulk additional pay spreadsheet (large group of 50+ lines)

Please refrain from adding restrictive data to HRA.
1. How do I cancel a request?
   If a request needs to be cancelled, please contact your HR Service Representative for assistance.

2. What happens if a change needs to be made to a HRA that has already been submitted and approved?
   Please enter a comment in the HRA documenting the change that is needed and attach any relevant documentation pertaining to the change. Also, please be sure to send a notification to your HR Service Representative to bring this to their attention. For questions, please contact your HR Service Representative.

3. Can I utilize Ad-Hoc approvers for a request?
   Yes, the ad-hoc functionality can be utilized for any HRA that goes through the approval workflow. For Change Other Employee Data and Change Funding Source HRAs, additional approvals should be obtained through some sort of documentation and attached to the HRA.

4. Can I submit a hire request on a Create New Position/Fill Existing Position HRA?
   HRAs should be submitted as a one-to-one ratio, whenever possible. When a final candidate has been selected for a position, please enter a Hire HRA request.

Step-by-Step Guides regarding each HRA Request Type can be found on the OAA HR Service Center website.