MANAGEMENT AND BUDGET

Correcting HR Data

August 2021

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Refer to SEMA4 Help for the most current SEMA4 information. This learning guide may be less current than instructions found in SEMA4 Help.

To request a reasonable accommodation and/or alternative format of this document, contact the Statewide Administrative Systems Help Line at (651) 201-8100 or accessibility.mmb@state.mn.us.

Welcome

Welcome to the *Correcting HR Data* learning guide, which is part of the SEMA4 curriculum.

Who should complete this guide?

Employees who need access to Correct History for Position data, Person data or Job data.

What skills will I learn?

You will develop skills to use Correct History in SEMA4 appropriately and safely when maintaining HR records.

When you work with effective-dated position and employee records, you access them using the page actions Update/Display, Include History, or Correct History. Not all users have access to Correct History. Your security clearance controls whether you can select Correct History.

Because Correct History affects the accuracy of your historical records, it's important to understand what it does and when to use it.

What do I need to know before starting?

You must have completed *SEMA4 Overview*. Also, be sure to complete either the *Position Management* or *Employee Maintenance* learning guide.

How much time will this take?

Actual time will vary, but plan on approximately 1 hour.

Directions

Read each topic, and then complete the exercise and review questions.

Follow-up

- Complete the evaluation form and send it to SEMA4 HR Services.
- Follow your agency's procedures for tracking completed training.

Introduction

In this guide, you will review each SEMA4 page action (Update/Display, Include History, and Correct History). You will learn that Correct History allows you to change information in historical and current effective-dated rows, and allows you to insert historical information.

You will see why you should select Correct History only when necessary; not when Update/Display or Include History would suffice. You will find out which fields should never be overwritten using Correct History, and you will discover the effect some corrections may have on an employee's insurance eligibility.

Through case studies, you will practice making decisions on which page action is necessary for specific situations.

The following topics are included in this guide:

- Effective Dates and Page Actions
- Maintaining HR Records

Continue to the next topic, *Effective Dates and Page Actions*.

Introduction

Position, person and job data records have effective dates. To maintain accurate HR records, it is important to understand effective dates and page actions.

Future, Current, Historical Information

- *Future* effective-dated information takes effect on dates that are beyond today's date. For example, if today's date is 1/2/2018, the user can enter a change to a position's funding information with a future date of 3/1/2018. The user does not have to remember to make the entry on 3/1/2018.

- *Current* effective-dated information has an effective date closest to, but not beyond, today's date. Only one row of information is current.

- *Historical* information has effective dates that are prior to that of the current effective-dated information.

Example: Today's date is 3/31/2018. An employee record has the following effective-dated rows of information: historical, current and future.

Action	Effective Date	blank	Date Entered
Hire	9/28/2017	Historical	9/25/2017
Change status from probationary to permanent	3/25/2018	Current	3/27/2018
Transfer	4/2/2018	Future	3/28/2018

Comparison of Page Actions

The page actions **Update/Display**, **Include History** and **Correct History** work with effective dates to access records in SEMA4. Let's review what the actions allow you to do.

Update/Display

- *View* current and future effective-dated information
- *Insert* current and future effective-dated information
- *Change* (type over) future effective-dated information

Include History

- *View* all effective-dated information (historical, current, and future)
- *Insert* current and future effective-dated information
- *Change* (type over) future effective-dated information

Correct History

- *View* all effective-dated information (historical, current, and future)
- *Insert* all effective-dated information (historical, current, and future)
- *Change* (type over) all effective-dated information (historical, current, and future)

Using the **Correct History** action can be dangerous because you can remove or change history. Use caution when selecting it. Be sure you have accessed the appropriate record before making any changes, and enter only the necessary changes.

Continue to the next topic, *Maintaining HR Records*.

Overview of Correct History

Correct History differs from the other page actions in some significant ways.

- When you use Correct History to change (type over) data, you're wiping out what was there before. History is not maintained. In contrast, when you add an effective-dated row, you *maintain a historical record* of information.
- Fewer SEMA4 users have the security clearance that allows them to use Correct History on HR records (position data, person data, and job data).
- Corrections to HR data can trigger events in employee benefits that need to be reviewed manually to determine what has changed.

What Correct History does

Correct History is more powerful than the other page actions. Using Correct History, you can:

- **Change information in historical and current effective-dated rows**.

  Correct History allows you to change (type over) information in historical and current effective-dated rows of information. You cannot do this using Update/Display or Include History.

- **Insert historical effective-dated information**.

  Correct History allows you to insert historical information, which is effective-dated prior to the current row. That is, you can "go back in time" to insert history. You cannot do this using Update/Display or Include History.

Use Correct History only when necessary

It's *not* a good idea to use Correct History all the time, for these reasons:

1. You could accidentally type over (wipe out) existing data in a field, without inserting an effective-dated row. In that case, history is not maintained.

2. You could insert a row of information with the wrong effective date inadvertently. The system doesn't prevent you from entering a historical effective date by mistake.

Select Correct History only when you need to change historical or current data, or insert historical data. For other situations, you access records using Update/Display or Include History, and *add an effective-dated row* before you enter changes.

Data affecting payroll or benefits

Never correct data in the following fields.

- **Department ID**, **Leave Authority**, and **Salary Authority**. Never correct (type over) or delete existing data; doing so causes problems for payroll. To update these fields, add a row with a new effective date or effective sequence number.

- **Home address**. Never correct the home address. If an employee moves, add an effective-dated row and enter the address on the new row.

Never correct data in the following fields without notifying the Minnesota Management & Budget (MMB) Insurance Division at insurance.events.mmb@state.mn.us

- **Special Eligibility**. Correcting this field requires special processing to ensure that the employee's insurance coverage is correct. A correction to the field can result in back charges or cancellation of existing insurance.

    - **If 30 days or fewer** have passed since the incorrect special eligibility code was entered, correct it using Correct History, and then notify the MMB Insurance Division at insurance.events.mmb@state.mn.us

    - **If more than 30 days** have passed since the incorrect special eligibility code was entered, notify the MMB Insurance Division at insurance.events.mmb@state.mn.us and work with them to determine the proper action to take.

- **Action**, **Reason**, **Effective Date**, **Officer Code**. Correcting any of these fields can result in cancellation of insurance. When correcting any of these fields, contact the MMB Insurance Division at insurance.events.mmb@state.mn.us

When a historical row is corrected, inserted, or deleted, a new row cannot be processed by SEMA4 until the changed row *and* all subsequent rows are re-processed to determine benefits eligibility. If any re-processed row had benefits consequences, insurance forms may be sent to the employee. These forms must be completed before the system can move on to re-process the next row. If the employee does not complete the forms, it is possible that insurance can be cancelled. Until the forms are completed and the remaining rows finish processing, any current row added must wait to be processed.

The Job Data row with action **Data Change**, reason **INC (Insurance Conversion)** is needed for employee benefits administration. Correcting this row or deleting it can affect an employee's insurance eligibility. Potentially, entering a change on this row could cause the employee to lose coverage back to April 2003.

If you have questions, contact your SEMA4 HR Specialist for advice.

Example situations requiring Correct History

Sometimes it's necessary to use Correct History. Here are some situations where you need to use Correct History.

A. To *fix errors*, such as typos, in *current or historical* information.

Use Correct History if an error was made in current or historical data, and there is no need to keep the original information.

Example 1: Today is 4/3/2018. When creating a new position, effective 4/2/2018, you mistakenly entered Temporary instead of Limited and saved it. This is the *current* effective-dated row of information.

To fix this typo, use Correct History, which allows you to change current effective-dated information. (You cannot change current or historical effective-dated information using Update/Display or Include History.)

	Effective Date		Reg/Temp	Date Entered
Fixed -->	4/2/2018	Current	Limited	4/3/2018

Example 2: Today is 4/3/2018. When hiring a new employee, effective 4/2/2018, you mistakenly entered the appointment end date 2/6/2019 instead of 6/2/2019 and saved it. This is now the *current* effective-dated row of information.

To fix this typo, use Correct History, which allows you to change current effective-dated information. (You cannot change current or historical effective-dated information using Update/Display or Include History.)

	Action	Effective Date		Appointment End Date	Date Entered
Fixed -->	Hire	4/2/2018	Current	6/2/2019	4/3/2018

B. To *insert historical* effective-dated information.

Use Correct History if you need to insert data effective *prior* to the current row of information.

Example: Today is 7/2/2018. An employee hired on 12/28/2017 is serving a probationary period. On 6/12/2018, a general adjustment mass update was processed, effective 7/1/2018. This is the *current* row.

The employee's probationary period ends, and on 7/2/2018 you need to insert a row effective-dated 6/28/2018, to change the Empl Class from probationary to permanent. Use Correct History, which allows you to insert a row of historical information. (You cannot insert history using Update/Display or Include History.)

You also need to correct the current row and enter a comment.

	Action	Effective Date		Date Entered
	Hire	12/28/2017	Historical	12/28/2017
Inserted -->	Change status from probationary to permanent	6/28/2018	Historical	7/2/2018
	General adjustment mass update	7/1/2018	Current	6/12/2018

Sometimes you need to insert a historical effective-dated row for a pay rate change. When you do that, enter a comment in Maintain/View Notes (Job Data Notepad) on the Job Data component, explaining why the row was inserted. In addition, you may insert a row of information after each subsequent effective-dated row.

How to select Correct History

There are two ways to select Correct History:

- On a search page, select the **Correct History** check box before you select the Search button.
- When a page is displayed, select the **Correct History** toolbar button at the bottom of the page.

Security clearance to Correct History

To request clearance to Correct History in SEMA4, contact your **Agency SEMA4 Security Administrator**, who submits a form to the State SEMA4 Security Administrator. To find out who your Agency SEMA4 Security Administrator is, inquire at sema4.security.mmb@state.mn.us.

Maintain HR Records – Exercise

To put your knowledge to use, try the following case studies.

Case 1

Today is 3/31/2018. There is a supervisory change, effective today, which makes it necessary to update the Reports To field on a position record. You should use:

a. Update/Display, and type over the existing data, because the change is effective today.
b. Correct History, and type over the existing data, because you need to change the current effective-dated row.
c. Update/Display, and add a new row, because you need to insert current effective-dated information.
d. Correct History, and type over the existing data in all rows, because you need to change the current row and all the history.
e. Correct History, because you need to fix an error.

Case 2

Today is 3/31/2018. For an employee who was hired on 3/26/2017, today you entered a progression increase effective 3/26/2018, which is the current effective-dated row.

Later today you discovered the need to insert a paid leave of absence for military leave, effective 3/24/2018, which is *prior* to the current effective-dated row.

	Action	**Effective Date**		**Date Entered**
	Hire	3/26/2017	Historical	3/26/2017
Insert -->	Paid leave of absence	3/24/2018	Historical	3/31/2018
	Progression increase	3/26/2018	Current	3/31/2018

To insert the paid leave of absence, use:

a. Update/Display, because you need to insert a row of information.
b. Correct History, because you need to insert a historical effective-dated row of information.
c. Include History, because you need to view the historical information.
d. Correct History, because you have access to it, and use it all the time.
e. None of these.

Case 3

Today is 3/31/2018. An employee is hired effective 4/2/2018, which is a *future* effective-dated row. Today you discover that the wrong pay rate was entered on this row.

	Action	Effective Date		Date Entered
Fix -->	Hire	4/2/2018	Future	3/31/2018

To correct the pay rate, use:

a. Correct History, because you need to fix an error.
b. Correct History, because you need to correct a row of information.
c. Update/Display, because you need to change future effective-dated information.
d. Update/Display, because Correct History should never be used.
e. None of these.

Case 4

Today is 3/31/2018. An employee in your agency moved to a different department ID in the agency today. To enter this information, you should use:

a. Correct History, because you need to correct the current department ID.
b. Nothing, because the department ID, leave authority, and salary authority fields should never be changed.
c. Correct History, because you need to fix an error.
d. Update/Display, and insert an effective-dated row of information.
e. Correct History, because it's okay to wipe out an existing department ID.

Case 5

Today is 3/31/2018. An employee in your department transferred to a different position in your department, effective today. To enter this information, you should use:

a. Update/Display, and insert an effective-dated row of information.
b. Correct History, and type over the position number on the current row only.
c. Correct History, and type over the position number in the current row and all historical rows.
d. Nothing; leave the record as-is.
e. None of these.

Case 6

Today, before entering a location change on the record of an employee you hired last week, you discover that the Special Eligibility code, on the Benefit Program Participation page, was incorrectly entered on the hire row. How should you fix it?

a. Use Correct History, because that is the only way to fix a data entry error.
b. Use Correct History, because it's okay to erase existing data in this field.
c. Prior to entering a new row, correct the hire row and notify the Insurance Division of the change at insurance.events.mmb@state.mn.us.
d. Do nothing; this code should never change.

Case 7

Today you decide to check the record of another employee who was hired last week. You find that the Special Eligibility code was entered incorrectly on this record, too. In addition, a location change row was entered, so the hire row is not the current row. How should you fix this?

a. Use Correct History, because data entered last week is history.
b. Use Correct History on the hire row and notify the Insurance Division of the change at insurance.events.mmb@state.mn.us. After correcting the hire row, correct the Special Eligibility Code on the location change row, to ensure that the change will be reflected on the current row.
c. Use Update/Display, and insert a row with the same effective date as the hire, and increase the effective sequence number. Use the action Data Change and reason BJC (Benefits Job Change).
d. Do nothing; this code should never change.

Case 8

While entering HR transactions on Friday afternoon, you are interrupted by a co-worker who needs your immediate assistance. You save the transaction you have just completed, without reviewing it. The next Tuesday you review the transaction and find you entered the wrong action, reason, effective date, and officer code. What should you do?

a. Use Correct History and type over the incorrect values, and notify the Insurance Division at insurance.events.mmb@state.mn.us.
b. Contact the DDIR before using Correct History to type over the action, reason, effective date or officer code field, to confirm that the change will not affect the employee's insurance coverage.
c. Use Update/Display, and insert a row with the same effective date as the incorrect transaction, increase the effective sequence number, and enter the action, reason and officer code.
d. Since this happened on a Friday, use Update/Display, and insert a row using the next day as the effective date; and then enter the correct action, reason and officer code.

Case 9

Today you notice that the wrong Special Eligibility code was entered at the time of hire. The code indicates not eligible for insurance coverage, but should indicate full insurance eligibility. What should you do? Select the correct answer(s).

a. If 30 days or fewer have passed since the record with the incorrect Special Eligibility code was entered, use Correct History and type over the incorrect values, and then notify the Minnesota Management & Budget (MMB) Insurance Division at insurance.events.mmb@state.mn.us.
b. If more than 30 days have passed since the record with the incorrect Special Eligibility code was entered, notify the Minnesota Management & Budget (MMB) Insurance Division at insurance.events.mmb@state.mn.us of the error and work with them to determine the proper action to take.
c. Using Update/Display, insert a row with the same effective date as the incorrect transaction, increase the effective sequence number, select action Data Change and reason BJC (Benefits Job Change), and select the Special Eligibility code.
d. Using Correct History, insert a row with the same effective date as the hire, increase the effective sequence number, and select action Data Change and reason BJC (Benefits Job Change), and select the Special Eligibility code.
e. a and b.

Check your answers on the next page.

Solution

Check your answers to the case studies.

Case 1. c

Case 2. b

Case 3. c

Case 4. d

Case 5. a

Case 6. c

Case 7. b

Case 8. a

Case 9. e

Review Questions

Review what you learned by answering the following questions. For assistance, you may refer to the page actions described on page 6.

1. To *view* historical effective-dated information, do you need Correct History?

    a. Yes
    b. No

2. To *change* (type over) future effective-dated information, do you need Correct History?

    a. Yes
    b. No

3. To *insert* a row of current effective-dated information, do you need Correct History?

    a. Yes
    b. No

4. To *insert* a row of historical effective-dated information, do you need Correct History?

    a. Yes
    b. No

5. To *change* (type over) current or historical effective-dated information, do you need Correct History?

    a. Yes
    b. No

6. To *insert* a row of future effective-dated information, do you need Correct History?

    a. Yes
    b. No

7. When you insert a historical row for a pay rate change, should you also enter a comment in Maintain/View Notes (Job Data Notepad)?

    a. Yes
    b. No

8. An employee moves to a new home address. Should you use Correct History to erase and correct the address on the existing row?

    a. Yes
    b. No

9. To request security clearance to Correct History, you should:

    a. Contact your Agency SEMA4 Security Administrator
    b. Call your LAN administrator

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. To *view* historical effective-dated information, do you need Correct History?

    b. No

2. To *change* (type over) future effective-dated information, do you need Correct History?

    b. No

3. To *insert* a row of current effective-dated information, do you need Correct History?

    b. No

4. To *insert* a row of historical effective-dated information, do you need Correct History?

    a. Yes

5. To *change* (type over) current or historical effective-dated information, do you need Correct History?

    a. Yes

6. To *insert* a row of future effective-dated information, do you need Correct History?

    b. No

7. When you insert a historical row for a pay rate change, should you also enter a comment in Maintain/View Notes (Job Data Notepad)?

    a. Yes

8. An employee moves to a new home address. Should you use Correct History to erase and correct the address on the existing row?

    b. No

9. To request security clearance to Correct History, you should:

    a. Contact your Agency SEMA4 Security Administrator

Please continue to the *Conclusion*.

Conclusion

Summary

In this guide, you reviewed what each page action allows you to do. You learned that Correct History allows you to change information in historical and current effective-dated rows, and allows you to insert historical information.

You learned why you should select Correct History only when necessary; not when Update/Display or Include History would suffice. You found out which fields should never be overwritten using Correct History. You discovered the effect some corrections may have on an employee's insurance eligibility. Through case studies, you practiced making decisions on which page action is necessary for specific situations.

Objectives

This guide included the following topics:

- Effective Dates and Page Actions
- Maintaining HR Records

Completion of *Correcting HR Data* Learning Guide Form

Complete the form on the next page and send it to your **Agency SEMA4 Security Administrator**, in your agency.

To request clearance to Correct History in SEMA4, contact your **Agency SEMA4 Security Administrator**, who submits the security form to the State SEMA4 Security Administrator.

Evaluation Form

Complete the Evaluation form on the last page and return it to SEMA4 HR Services.

Thank you for participating!

MANAGEMENT AND BUDGET

Completion of *Correcting HR Data* Learning Guide

You have requested Correct History as part of your SEMA4 security access. It is important to know that Correct History is more powerful than Update/Display and Include History. With Correct History, users can change historical and current effective-dated information, and insert historical effective-dated information.

If you have clearance to Correct History, remember that it's **not** a good idea to use Correct History all the time. You could accidentally type over existing data without inserting an effective-dated row, or insert a historical effective date by mistake. Select Correct History **only** when you need to change historical or current data, or insert historical data.

Because Correct History involves higher risk for transactions, the following requirements must be completed before being granted access.

Requirements for Granting Correct History:

1) You must successfully complete the *Correcting HR Data* learning guide and submit a signed statement to that effect. This guide explains how to use Correct History in SEMA4 appropriately and safely when maintaining human resource records.

2) Sign this form and return it to your **Agency SEMA4 Security Administrator**. Once the above requirements have been met, you will be granted Correct History.

If you have questions about the information in this document, contact your Agency SEMA4 Security Administrator.

By signing this form, I verify that I have completed the *Correcting HR Data* Learning Guide and will use Correct History **only** to change historical or current data, or insert historical data.

_____
Signature

_____
Print name

_____
Name of agency

_____
Date

admserv/SEMA4/General/Completion of Correcting HR Data

400 Centennial Building ● 658 Cedar Street ● St. Paul, Minnesota 55155
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Please return only this page to SEMA4 HR Services. *Send the form on the previous page to your Agency SEMA4 Security Administrator. Thank you.*

Evaluation

Correcting HR Data

Your Name (Optional) _____ Date_____

Agency _____

Check the box that best describes what you learned.

Concepts	I fully understand	I am slightly confused	I do not understand	Was not addressed
Update/Display				
Include History				
Correct History				
Why select Correct History only when necessary, not all the time				
Fields to never wipe out using Correct History				
The effect Correct History may have on an employee's insurance eligibility				
Situations where Update/Display or Include History are sufficient				
Situations that require using Correct History				
Processes	Blank	Blank	Blank	Blank
Inserting an effective-dated row of information				
Selecting Correct History check box or toolbar button				

In what three ways will you apply what you have learned in this guide?

1.

2.

3.

Write any other comments below. Thank you!