Automatic Actions, Other Than Terminations
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Introduction

EHRP automatically updates the records of employees who complete their probation period. It also automatically produces the personnel actions to change the tenure of employees who meet the three year requirement to convert from career conditional appointments to career appointments. Employees who are eligible to receive within grade increases (WGI), will automatically receive those provided the performance ratings are current (not more than 15 months) and last equivalent increase is correct. This topic describes what the system requires to perform this function and how you can use the information that the system provides.

To enable EHRP to run automatic actions, the required position and employee data must first be set up.

Probation Termination

The Probation Termination Automatic Action will identify employees who will reach the end of their probation period within 60 days.

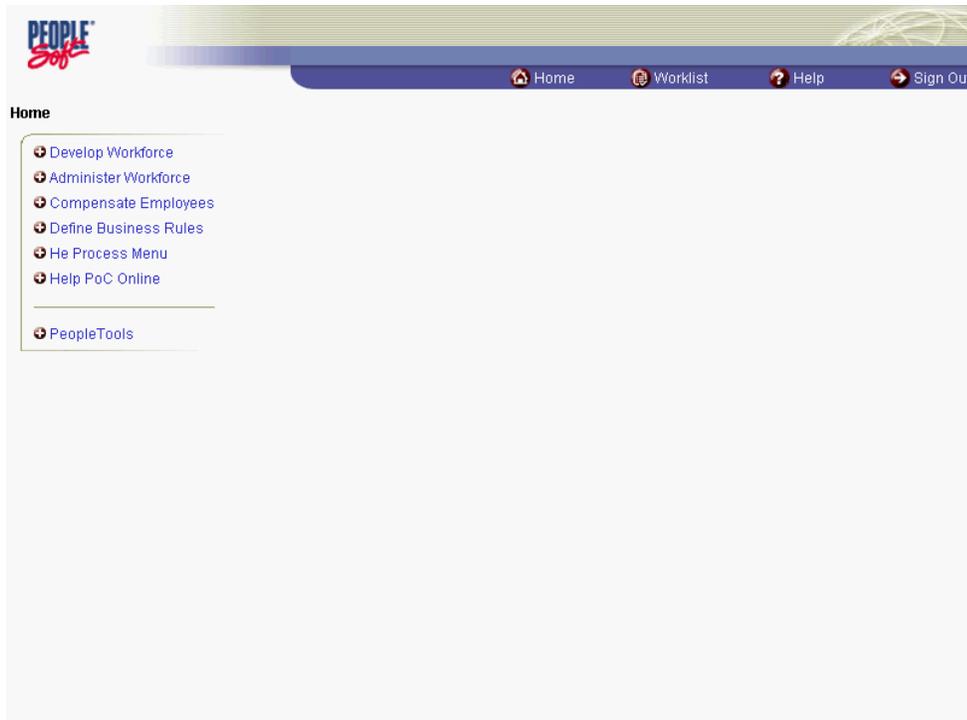## Empl Approaching the End of their Probation Period

Introduction

To enable EHRP to run automatic actions, the required position and employee data must first be set up. For probation termination, the Probation Date and Reports To Position must be identified on the Employment 2 page of the HR Processing page group.

The effectiveness of the probation termination process is dependent upon frequent review of notifications for probation termination. It is recommended that the notifications be reviewed at least once per pay period.
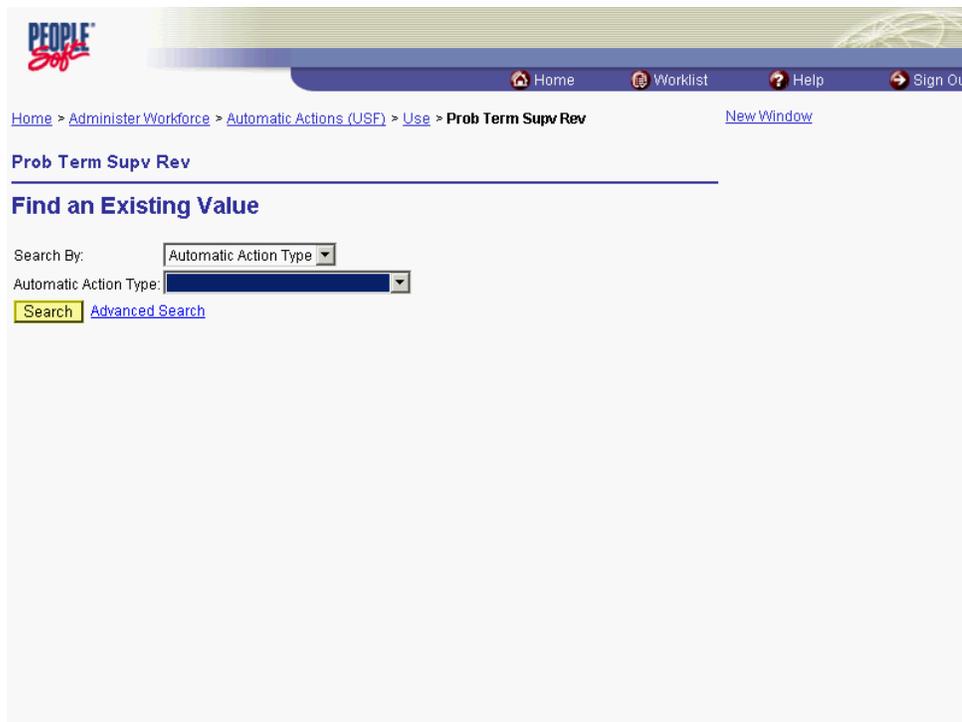
Procedure

The following details the steps to use to review the list of employees the system has identified as approaching the end of their probation period.

Step	Action
1.	Click the **Administer Workforce** link. ⊙ Administer Workforce
2.	Click the **Automatic Actions (USF)** link. ⊙ Automatic Actions (USF)
3.	Click the **Use** link. ⊙ Use
4.	Click the **Prob Term Supv Rev** link. Prob Term Supv Rev

Step	Action
5.	Select which search criteria to use by selecting one from the **Search By** dropdown menu. Click the **Search By** list. ▾
6.	Select the desired entry. Click **Automatic Action Type**. Automatic Action Type
7.	Click the **Automatic Action Type** list. ▾

Step	Action
8.	Scroll as necessary and click an entry in the list. Click **Within Grade Increase**. Within Grade Increase
9.	Click the **Search** button. Search
10.	The page will list the employees that meet the search criteria and are within 60 days of completing their probationary period. Automatic Actions are deleted from the user's worklist when the user clicks on the corresponding link to open the item.
11.	The employees who will reach the end of their probation period within 60 days are identified. **End of Procedure.**

> NOTE: If the requirements of the probationary period have been satisfied, then the system will automatically update the employee record to remove the probation date from the Employment Data 2 page.

Tenure Conversion

In EHRP, there are several routine HR functions that are automated. One function of this type is the Tenure Conversion function. This section describes what the system requires to perform this function and how to use the information that the system provides.

Rev Empl Near Their Tenure Conversion Date

Introduction

To enable EHRP to run automatic actions, the required position and employee data must first be set up. In order for the conversion actions to occur, the Service Conversion Dates must be entered on the Employment 1 page and the Reports To Position and the Tenure Status must be completed on the Employment 2 page.

Procedure

The following details the steps the user can use to review the list of employees the system has identified as approaching their tenure conversion date.
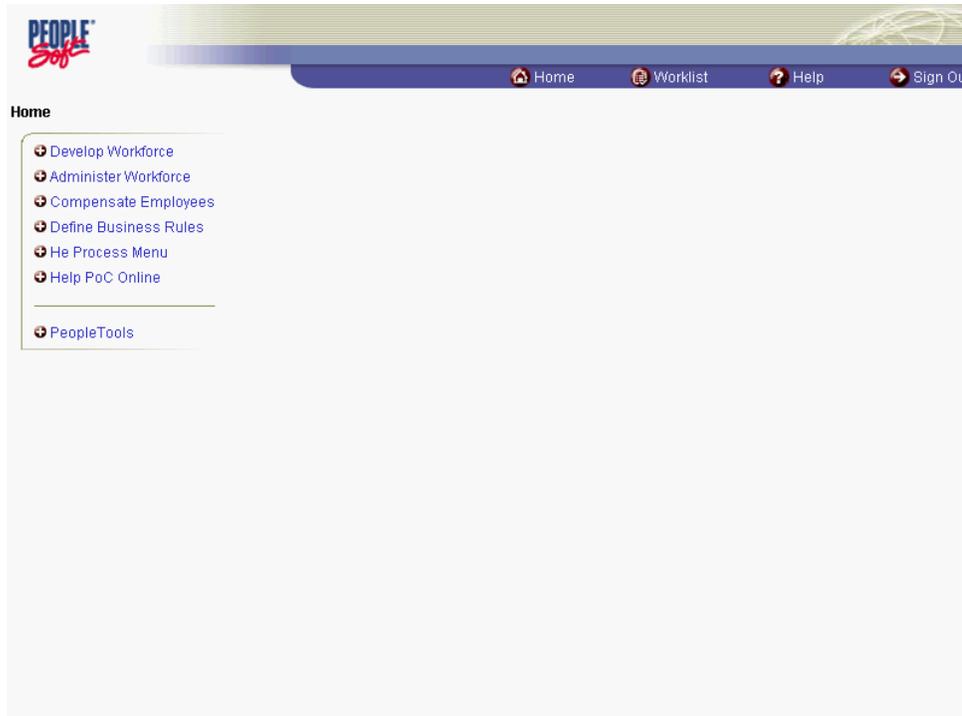
Step	Action
1.	Click the **Administer Workforce** link. ⊙ Administer Workforce
2.	Click the **Automatic Actions (USF)** link. ⊙ Automatic Actions (USF)
3.	Click the **Use** link. ⊙ Use
4.	Click the **Tenure Conv Notice** link. Tenure Conv Notice

Step	Action
5.	Select which search criteria to use by selecting one from the **Search By** dropdown menu. Click the **Search By** list. ▾
6.	Select the desired entry. Click **Automatic Action Type**. Automatic Action Type
7.	Click the **Automatic Action Type** list. ▾

Step	Action
8.	Scroll as necessary and click an entry in the list. Click **Within Grade Increase**. Within Grade Increase
9.	Click the **Search** button. Search
10.	The page will list the names of employees who meet the search criteria and are eligible for conversion. Automatic Actions are deleted from the user's worklist when the user clicks on the corresponding link to open the item.
11.	The employees who will reach the end of their tenure conversion date within 60 days are identified. **End of Procedure.**

Within-Grade Increase

In EHRP, an important automated HR function is the Within-Grade Increase (WGI). This section describes what the system requires to perform this function and how to use the information that the system provides.
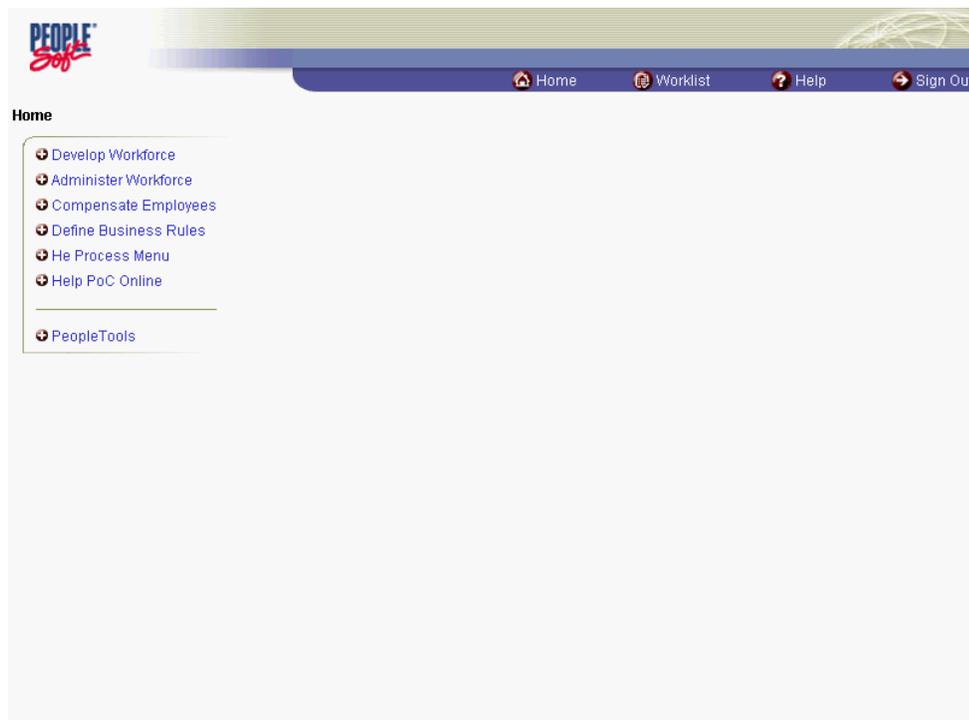
Entering Employee's Performance Appraisal Rating

Introduction

To enable EHRP to run automatic actions, the required position and employee data must first be set up. In order for the WGI actions to be performed, the employee must have a performance appraisal rating or record that is Fully Successful or higher, and the rating must have occurred within the last 15 months. The employee must also have a WGI status of "Waiting" or "Approved" on the Employment 1 page. The Reports To Position must also be completed on the Employment 2 page.

The information for the performance appraisal rating is entered in the Manage Performance component of EHRP.
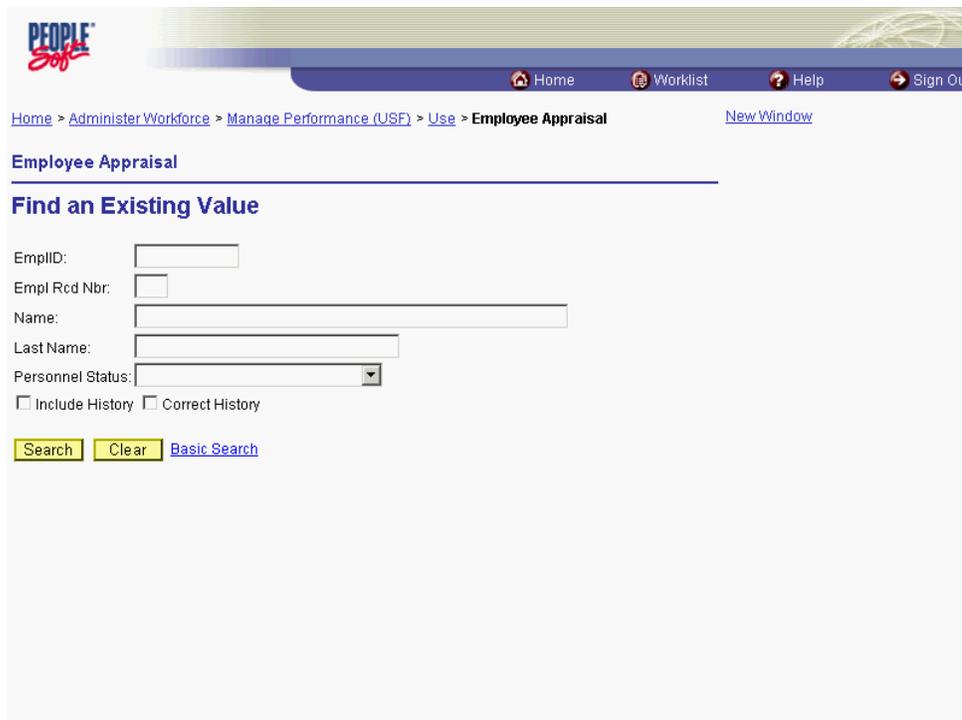
Procedure

The following steps detail how to enter the employee's performance appraisal ratings.

Step	Action
1.	Click the **Administer Workforce** link. 🔴 Administer Workforce
2.	Click the **Manage Performance (USF)** link. 🔴 Manage Performance (USF)
3.	Click the **Use** link. 🔴 Use
4.	Click the **Employee Appraisal** link. Employee Appraisal

Step	Action
5.	Click in the field in which you want to search. Click in the **Last Name** field.
6.	Enter the desired information into the **Last Name** field. Enter "**Winter**".
7.	Click the **Search** button. Search
8.	Select the desired entry. Click **Winter, Betty**.

Step	Action
9.	Click the **Choose a date** button.

> The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

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Step	Action
10.	Click on the effective date of the appraisal in the **Effective Date** field. Click on **15**.

Step	Action
11.	In the **From/To** Date fields, enter the period of time for which the employee is being appraised. Click in the **From Date** field.
12.	Enter the desired information into the **From Date** field. Enter "**12/01/2002**".
13.	Press **[Tab]**.
14.	Enter the desired information into the **To Date** field. Enter "**12/01/2003**".
15.	Press **[Tab]**.
16.	If known, enter the date of the next review in the **Next Review Date** field. Enter the desired information into the **Next Review Date** field. Enter "**12/15/2004**".
17.	Press **[Tab]**.
18.	Enter the desired information into the **Rating Scale** field. Enter "**A**".

	The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

Step	Action
19.	Press **[Tab]**.
20.	Enter the desired information into the **Review Rating** field. Enter "**3**".

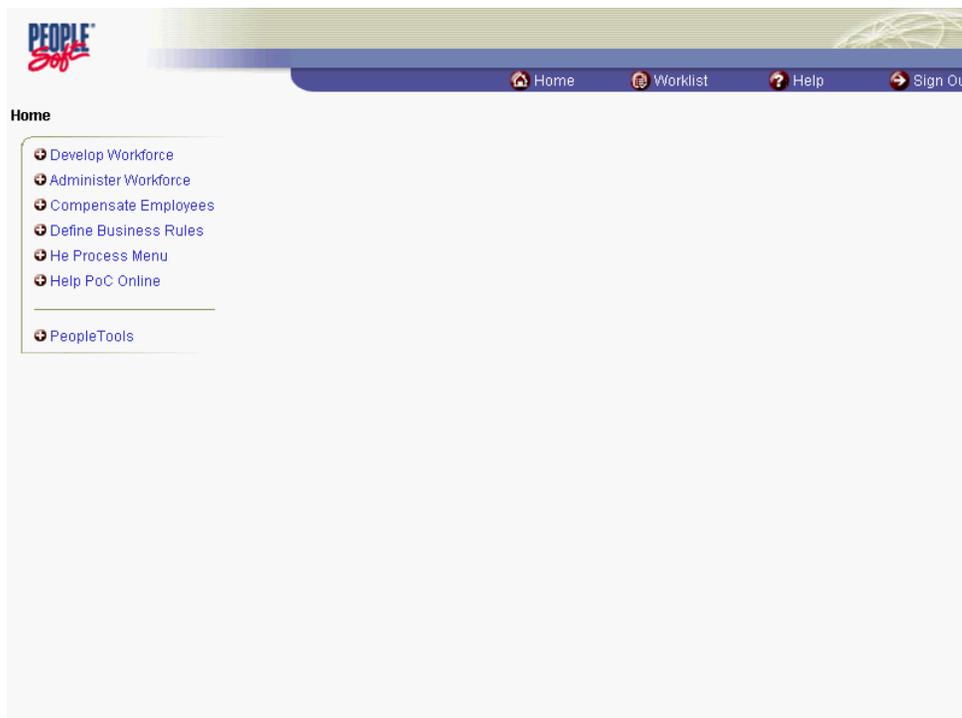| Step	Action
21.	Click the **Save** button. 🖫 Save
22.	The employee's performance appraisal ratings are entered. **End of Procedure.**

Reviewing Empl Near Their WGI Date

Introduction

The WGI Automatic Action will identify employees who are eligible for an increase within 60 days.

The effectiveness of the WGI automatic process is dependent upon the frequent review of notifications for WGI. It is recommended that the notifications be reviewed, at minimum, once per pay period. Timely entry of performance appraisals is also an important component of this process.

Procedure

The following details the steps to use to review the list of employees the system has identified as approaching their WGI date.
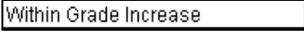
Step	Action
1.	Click the **Administer Workforce** link. ⊙ Administer Workforce
2.	Click the **Automatic Actions (USF)** link. ⊙ Automatic Actions (USF)
3.	Click the **Use** link. ⊙ Use
4.	Click the **WGI Notice** link. WGI Notice

Step	Action
5.	Select which search criteria to use by selecting one from the **Search By** dropdown menu. Click the **Search By** list. ▾
6.	Select the desired entry. Click **Automatic Action Type**. Automatic Action Type
7.	Click the **Automatic Action Type** list. ▾

Step	Action
8.	Scroll as necessary and click an entry in the list. Click **Within Grade Increase**.
	Within Grade Increase

> Here are definitions for WGI automatic actions:
>
> **Within Grade Increase** - These employees will receive an automatic WGI within 60 days.
>
> **Manual WGI** - You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
>
> **Retroactive WGI** - These employees have a WGI Status of *Waiting,* but were due a WGI in a previous pay period.
>
> **WGI W/O Min. Performance** - These employees have an Overall Review Rating below *Satisfactory* or don't have a review within the last fifteen months.

Step	Action
9.	Click the **Search** button. Search
10.	The page will list the employees that meet the search criteria and are eligible for a within-grade increase. Automatic Actions are deleted from the user's worklist when the user clicks on the corresponding link to open the item.
11.	The list of employees the system has identified as approaching their WGI date displays. **End of Procedure.**

> NOTE: If the supervisor wishes to deny the WGI, the supervisor will request a personnel action deny the WGI. This personnel action request would be an 888-0 NOA, Denial of WGI and the manager would enter the following action and reason codes, DTA and PRA.
>
> NOTE: If the supervisor approves of the within-grade increase, then the system will automatically process that increase.