**HRMS 101 and Preparation for Transition**

**PANC – April 12, 2022**

The Human Resource Management System (HRMS) is a comprehensive information system specifically designed to meet the human resource management needs of all public schools in North Carolina. The current system provides the following:

* Management of employment**,** benefit information, leave of absence tracking, current licensure information and specialized local information
* Reporting tool for legislative, general reporting and specialized local reports
* Online specialized Help with detailed, step-by-step instructions (We will be using this tool today!) https://files.dpi.state.nc.us/HRMS\_help/

There are two integrated HRMS modules which include HRMS LEA, and the HRMS Reporting Tools.

**HRMS LEA**

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/HRMS%20Home%20Page%20Help.html>

The HRMS LEA module consists of numerous features including:

* Maintaining employee records
  + Demographics <https://files.dpi.state.nc.us/HRMS_help/mainSpace/Employee%20Demographics.html>
    - Emergency Contact Information
  + Benefits
  + Beginning Teacher Status
  + Tenure Status **(Although an individual can no longer work toward or gain Tenure this status code is still important in the generation of reports and determining Type of Contract to be issued for Certified Staff)**
* Position management

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Position%20Management%20(Central%20Office).html>

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Create%20a%20Position>

* + Position information
  + Budget code management
  + Site Location
  + Position description
  + FT/PT
  + Licensed
  + Classified
* Assignment management

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Add%20Assignment.html>

* + Position Assigned with all supporting information
  + Grade and Step Identification
  + Budget Code Assigned
  + Percent Employed / Hours Employed
  + Linkage to Payroll System based on Budget Code and SSN
* Staff actions

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Staff%20Action%20Console.html>

* + Leave of absence
  + Promotions, Demotions andSuspensions
  + Separations
  + New Hires andRe-employments
* Contract management

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Contracts.html>

* + Teacher
  + Temp FT
  + Temp PT
  + Administrative Term Contracts can now also be constructed, managed and printed within HRMS
  + Specific Contract Conditions for all contracts
* Licensure information

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Employee%20License%20Data.html>

* + Current License Information
  + Updated daily (Monday – Friday)
  + Special list of actions taken for active employees (updated daily with 30 day moving list)

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Licensure%20Data%20Changes.html>

* Continuing education tracking

[HRMS Communication Site - CEU Template Management (state.nc.us)](https://files.dpi.state.nc.us/HRMS_help/mainSpace/CEU%20Template%20Management)

* + Posting of Credits
    - Total Credits
    - Academic credits
    - Literacy credits
    - Digital Learning Credits
  + Mass Updates to correct errors
* Substitutes

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Substitute%20Profile.html>

* + Titles
  + Availability / Sites
* Mass update processes

[https://files.dpi.state.nc.us/HRMS\_help/mainSpace/Mass%20Updates.htm**l**](https://files.dpi.state.nc.us/HRMS_help/mainSpace/Mass%20Updates.html)

* + BT Statuses
  + Budget Codes / Salary Table linkage from Payroll
  + Substitute Salary Increases
  + Contracts for Next School Year from Existing Contracts
* Renewal / Non-renewal Eligibility Review Documentation

[HRMS Communication Site - License Assignment and Contract Info (state.nc.us)](https://files.dpi.state.nc.us/HRMS_help/mainSpace/License%20Assignment%20and%20Contract%20Info.html)

* + Assignment
  + License
  + Current / Past Contracts
* Online help documentation and knowledge base

<https://files.dpi.state.nc.us/HRMS_help/>

* Special Help
  + Dismissed Teacher List

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Dismissed%20Teacher%20List.html>

* + Revoked License List
  + Do Not Hire List (local)

[HRMS Communication Site - Do Not Hire List (state.nc.us)](https://files.dpi.state.nc.us/HRMS_help/mainSpace/Do%20Not%20Hire%20List.html)

**HRMS Reporting Suite (Appletree and LEA module)**

The HRMS reporting tools benefits HR professionals in multiple areas by allowing them to meet the state and federal reporting requirements. The reporting tools cut costs, improve productivity, established uniformity in reportingand provides added value to the LEAs. The Reporting Tool compiles reports as well as contracts created within HRMS LEA. **Please remember the Reports are only as accurate as the information is accurate within your HRMS System.** This is major reason for cleaning up your HRMS Data!

There are two separate Reporting Tools that both pull from the same data base.

* **The Apple Tree Reporting Tool**

<https://files.dpi.state.nc.us/HRMS_help/mainSpace/Reporting%20Tool.html> This tool is a standalone tool that can be loaded to your desk top and is used for contract printing, licensure reports, continuing renewal credit reporting, and state / federal summary reports just to name a few of the major tasks managed here.

* **The HRMS Web Reporting Tool** (This tool is accessible from the HRMS Home Page

[HRMS Communication Site - Web Reports (state.nc.us)](https://files.dpi.state.nc.us/HRMS_help/mainSpace/Web%20Reports)

This tool is hosts a number of canned reports and also has a query builder option that is easy to use for Locally Defined Reports. Some of the more often used canned reports are the CEU Totals, New Hire, BT Status, and Validated License reports. The Query Builder Tool is invaluable for developing reports to meet specialized local needs.

**Reports (State and Federal)**:

New Hire

Paraprofessional

Professional Development

Public Records

SS200

SS300

EEO-5

Teacher Turnover

Beginning Teacher Turnover

**Reports Other**:

Licensure – Renewal, CEU Totals, Validated, Specific Licensure Type Listing (Provisional / Residency / Emergency / Initial / Continuing)

Continuing Education

Employee Listing

Personnel Directory

Substitute Listing

Standard Web Reports

Query Builder

Local Web Reports

**Cleanup of HRMS and Preparation for Conversion**

A regular review of the information housed within your HRMS System is highly recommended to ensure accuracy in state, federal and local reporting. In addition, having an up-to-date and accurate data base in HRMS will provide for a better transfer of data to your next / modern system. To ensure the accuracy of information in HRMs from your daily information entry and information coming into HRMS from your payroll system it is recommended that the following steps be taken.

* Run the following Specific Reports from the LEA Web Reporting Tool
  + 80001 – Payroll Employees not in HRMS
  + 80004 – HRMS Employees with No Position Assignment
  + 80005 - [Active Payroll Assignments with Missing/Invalid HRMS Position Numbers](https://149.173.159.76/hrms/leawebreport.nsf/8d7a039ea6ae26e485256fb30058d4c9/306a4ef2977afbcb852578a20081ae80?OpenDocument)
  + 80006 – Active HRMS Employees NOT Active in Payroll
  + 80007 – SS200 and EEO5 Cleanup
  + 000019 - [Employees With Disabled or Invalid Employment Status Codes](https://149.173.159.76/hrms/leawebreport.nsf/8d7a039ea6ae26e485256fb30058d4c9/de3a4afd6f9e5bdf852578a20081aebb?OpenDocument)
  + 000020 - [Active Employees With Zero or Multiple Primary Assignments](https://149.173.159.76/hrms/leawebreport.nsf/8d7a039ea6ae26e485256fb30058d4c9/8b0496790436b78a852578a20081aec1?OpenDocument)
  + 000022 - [Inactive Employees with Current Assignments](https://149.173.159.76/hrms/leawebreport.nsf/8d7a039ea6ae26e485256fb30058d4c9/d16ab792c6ca20ab852578a20081aedf?OpenDocument)
* Please note these tools to cleanup your HRMS Data are available for easy use within your current HRMS System but will not be available in your new system as the new systems are combined HR and Payroll Systems are work from one table and won’t need regular review and cleanup!

**Assistance**

* **Gordon Millspaugh** (FREE assistance on HRMS issues / questionsand cleanup procedures / ZOOM or TEAMS Sessions can be scheduled to provide direct assistance!)

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**Information on Possible Funding Assistance for Conversion to a Modern System**