SSSA | HR SMART Form Instructions

Government of South Australia
Department of Treasury and Finance

Click on the required HR Form for more details on the requests available in each form and instructions to complete:

[HR01](#)

[POSITION MANAGEMENT](#)

[HR02](#)

[EMPLOYMENT MANAGEMENT](#)

[HR03](#)

[EMPLOYEE DETAILS MANAGEMENT](#)

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The HR Smart Forms are frequently updated.
To ensure you are using the most up to date version always access via [this link.](#)

HR01 POSITION MANAGEMENT

Audience

- Managers (Delegates)
- Administration Support
- Human Resources

When to use

To create a Position or request a change to Position Details

Before you start

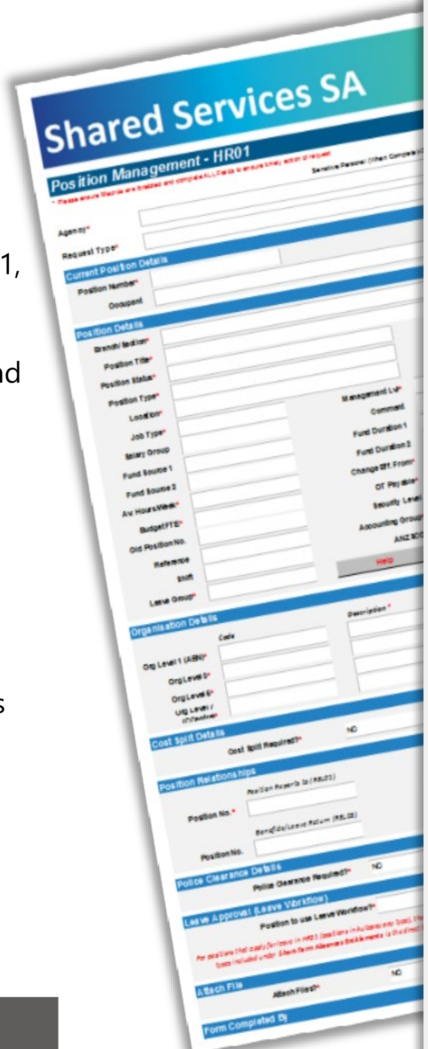
You will be prompted to *Enable Content (macros)* upon opening the form. Once enabled, the Smart Forms will populate position information from the data held in CHRIS 21, reducing the manual input required.

Once you have enabled macros, select the correct Agency and the applicable Request Type. Once the Request Type is selected, the form will display only the sections applicable to the request.

Notes

- Optional sections will not display initially; to complete these sections, select YES from the drop down.
- Mandatory fields are flagged with a Red * and these fields must be completed.
- Field specific assistance (tool tips) will display when the field is selected. Some fields also have a Help button which will provide more information.
- To save a copy of the form, use the in-built Save Copy button.

Click to view HR form troubleshooting



Click the Request Type for more details

- Abolish Existing Position
- Create a New Position Update
- Funding Details Update
- Organisation Details Update
- Position Details
- Update Position of Trust Details
- Update Position Relationships OR Workflow

HR01 POSITION MANAGEMENT - Abolish Existing Position

The sections available for completion in this Request Type are:

- Current Position Details
- Position Details
- Organisation Details (FIO)
- Form Completed by
- Attach File
- Submission and Approval
  - Completed By
  - Delegates
  - Employee
  - HR or Finance

To complete Optional sections, select YES from the drop down

Current Position Details

Enter the Position Number. The Occupant and Employee Number is only required if the position is currently occupied.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Position Details

Enter the abolished date in the Change Eff. From field. Review and complete any blank mandatory fields as required. Updated fields will be flagged with a ‘C’.

Organisation Details

The current organisation levels will populate. No updates are required when abolishing a position.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate’s Approval – is the person with delegation to approve and is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

Some information, including Position and Employee Number, can be found in [HR21 Employee and Manager Self-Service.]

HR01 POSITION MANAGEMENT – Create New Position

The sections available for completion in this Request Type are:

- Position Details
- Organisation Details
- Cost Split Details
- Position Relationships
- Position Check/ Screening Clearance Details
- Leave Approval
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Position Details

Enter the new position details by typing or selecting the applicable options from the drop-down lists. Complete all fields as per Agency requirements. When selecting values, it can help to model the information on a similar existing position; the data can be found in CHRIS 21 or HR21 Employee and Manager Self-Service.

Detailed help on Leave Group can be viewed by clicking the Help button below the field.

An existing position number can be entered to populate mandatory fields and changes can be made where required.

Leave Group can be selected by code eg SD9.

Organisation Details

Organisational Levels define where the position sits in the Agency. To view the Org Level Codes and Descriptions, select the Click here… button. You will need to enter the **Org Level Codes;** the **Descriptions** will populate based on the code entered.

Cost Split Details

If the salary cost of the position is to be charged to more than one cost centre, enter the **Cost Centre Codes** and **Percentage** of cost split.

Position Relationships

Defines the reporting structure and determines HR21 relationships. **Position Reports To** is the position this position will report to, e.g., the managers/approvers Position Number. **Clerical Admin** and **Bonafide/Leave Return** relate to HR21, refer to field specific assistance for more information.

Position Check/Screening Clearance Details

If a Police Clearance is required to occupy the position, then it is considered a **Position of Trust**. Indicate if the position is a Position of Trust (NO/YES) and define the required Police Clearances.

Leave Approval

If the position uses Leave Workflow in HR21, enter the **Levels** for each **Workflow Group.**

To view the breakdown of the Workflow Groups, select the Click Here… button.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here… button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR FORMS

POSITION MANAGEMENT – Update Funding Details

The sections available for completion in this Request Type are:

- Current Position Details
- Position Details
- Organisation Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Current Position Details

Enter the Position Number. The Occupant and Employee Number is only required if the position is currently occupied.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Position Details

Update the **Funding Source/s, Duration/s** and **Percentage %** as applicable. Review and complete any blank mandatory fields as required. Updated fields will be flagged with a **'C'**.

Organisation Details – For Information Only

The current organisation levels will populate. No updates are required when updating funding details.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

Some information, including Position and Employee Number, can be found in HR21 Employee and Manager Self-Service.

HR01 POSITION MANAGEMENT – Update Organisation or Costing Details

The sections available for completion in this Request Type are:

- Current Position Details
- Position Details
- Organisation Details
- Cost Split Details
- Attach File
- Submission and Approval
  - Completed By
  - Delegates
  - Employee
  - HR or Finance

To complete Optional sections, select YES from the drop down

Current Position Details

Enter the Position Number. The Occupant and Employee Number is only required if the position is currently occupied.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Position Details

Review and complete any blank mandatory fields, noting any changes to the current set up will be flagged with a 'C'.

Organisation Details

The current Organisational Levels will populate. Update the fields to define where the position sits in the Agency. To view the Org Level Codes and Descriptions, select the Click here… button. If an update is required, enter the applicable Org Level Codes; the Descriptions will populate based on the code entered.

Cost Split Details

If the salary cost of the position is to be charged to more than one cost centre, enter the Cost Centre Codes and Percentage of cost split.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here… button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

Some information, including Position and Employee Number, can be found in [HR21 Employee and Manager Self-Service.]

HR FORMS

HR01 POSITION MANAGEMENT – Update Position Details

The sections available for completion in this Request Type are:

- Current Position Details
- Position Details
- Organisation Details
- Cost Split Details
- Position Relationships
- Position Check/ Screening Clearance Details
- Leave Approval
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Current Position Details > Enter the **Position Number.** The **Occupant** and **Employee Number** is only required if the position is currently occupied.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Position Details > Review and complete any blank mandatory fields, noting any changes to the current set up will be flagged with a **'C'.**

Leave Group can be selected by code eg SD9.

Organisation Details > Organisational Levels define where the position sits in the Agency. If an update is required, enter the **Org Level Codes**, the **Descriptions** will populate based on the code entered. To view the Org Level Codes, select the Click here… button.

Cost Split Details > If there is a current cost split applied to the position, the details will populate. If a new or change to the current cost split is required, enter the **Cost Centre Codes** and **Percentage** of cost split.

Position Relationships > Defines the reporting structure and determines HR21 relationships. **Position Reports To** is the position this position will report to, e.g., the managers/approvers Position Number. **Clerical Admin** and **Bonafide/Leave Return** relate to HR21, refer to field specific assistance for more information.

Position Check/Screening Clearance Details > If a Police Clearance is required to occupy the position, then it is considered a Position of Trust. Indicate if the position is a **Position of Trust (NO/YES)** and define the required Police Clearances.

Leave Approval > For positions that use Leave Workflow in HR21, enter the **Levels** for each **Workflow Group.**

To view the breakdown of the Workflow Groups, select the Click here… button.

Attach File > If supporting documentation is required, select the Attach File button to attach document/file.

Submission and Approval > All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here… button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

When selecting values it can help to model the information on a similar existing position; data can be found in CHRIS 21 or [HR21 Employee and Manager Self-Service](.)

HR01 POSITION MANAGEMENT – Update Position of Trust Details

The sections available for completion in this Request Type are:

- Current Position Details
- Position Details
- Position Check/ Screening Clearance Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Current Position Details

Enter the **Position Number**. The **Occupant** and **Employee Number** is only required if the position is currently occupied.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Position Details

Review and complete any blank mandatory fields, noting any changes to the current set up will be flagged with a **'C'**.

Position Check/Screening Clearance Details

If a Police Clearance is required to occupy the position, then it is considered a Position of Trust. Indicate if the position is a Position of Trust (NO/YES) and define the required Police Clearances.

Attach File

If supporting documentation is required, select the **Attach File** button to attach document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is **mandatory** to complete.
- Delegate's Approval – is **mandatory** to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are **optional**; complete as per each Agency's requirements.

Once each stage is completed, select the **Click here…** button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

Some information, including Position and Employee Number, can be found in HR21 Employee and Manager Self-Service.

HR01 POSITION MANAGEMENT – Update Position Relationships or Workflow

The sections available for completion in this Request Type are:

- Current Position Details
- Position Details
- Organisation Details
- Position Relationships
- Leave Approval
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Current Position Details

Enter the **Position Number**. The **Occupant** and **Employee Number** is only required if the position is currently occupied.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Position Details

Review and complete any blank mandatory fields, noting any changes to the current set up will be flagged with a '**C**'.

Organisation Details

The current organisation levels will populate. No updates are required when updating the Position Relationships or Workflow.

Position Relationships

Defines the reporting structure and determines HR21 relationships. **Position Reports To** is the position this position will report to, e.g., the managers/approvers Position Number. **Clerical Admin** and **Bonafide/Leave Return** relate to HR21, refer to field specific assistance for more information.

Leave Approval

For positions that use Leave Workflow in HR21, enter the **Levels** for each **Workflow Group**.

To view the breakdown of the Workflow Groups select the Click Here… button.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here… button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

Some information, including Position and Employee Number, can be found in HR21 Employee and Manager Self-Service.

HR02 EMPLOYMENT MANAGEMENT

Audience

- Managers (Delegates)
- Administration Support
- Human Resources

When to use

To create a New Employment Contract or change Employment Details.

Before you start

You will be prompted to *Enable Content (macros)* upon opening the form. Once enabled, the Smart Forms will populate position information from the data held in CHRIS 21, reducing the manual input required.

Once you have enabled macros, select each Agency and the applicable Request Type. Once the Request Type is selected, the form will display only the sections applicable to the request.

Notes

Optional sections will not display initially; to complete these sections, select YES from the drop down.

Mandatory fields are flagged with a Red * and these fields must be completed.

Padlocked fields cannot be edited.

Field specific assistance (tool tips) will display when the field is selected. Some fields also have a Help button which will provide more information.

To save a copy of the form, use the in-built Save Copy button.

Click here to view HR form troubleshooting

Click the Request Type for more details

- Allowances OR Additional Duties
- Change of Hours OR Roster
- Create New Contract
- Extend Contract Existing Employee
- Permanent Assignment
- Temporary Assignment
- Termination
- Separation

HR02 EMPLOYMENT MANAGEMENT – Allowance or Additional Duties

The sections available for completion in this Request Type are:

- Employee Details
- Allowance Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Employee Details

Enter the **Employee Number**, Surname and **Given Name**.

Allowance Details

Select the **Type of Allowance** from the drop-down list and enter the **Start Date, End Date** and **Original Start Date** (will only differ to Start Date if the request is to extend an allowance). Complete all other fields applicable to the allowance as required.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed select the Click here… button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR02 EMPLOYMENT MANAGEMENT – Change of Hours or Roster

The sections available for completion in this Request Type are:

- Employee Details
- Roster Details
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Employee Details

Enter the **Employee Number**, **Surname** and **Given Name**.

Roster Details

Select the **Number of Roster Cycles** from the drop down list if required. Enter the **Start Date**, **Current** and **New Work Hours**. Complete all other fields applicable to the Roster as required.

Select Yes if the change is due to a Compressed Week arrangement.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR02 EMPLOYMENT MANAGEMENT – Create New Contract

The sections available for completion in this Request Type are:

- Employee Details
- Recruitment/Position Details
- Work Address Details
- SA Government Employment Status
- Postal Address Details
- New Employment/Contract Details
- Salary Details
- Organisation Details (view only)
- Cost Splits
- Pay Type & Electronic Roster OR Leave Paid System Details
- Allowance Details
- Right to Further Employment Details
- Roster Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

SA Government Employment Status

Employee Details > Enter the employee's **Date of Birth**, **Title, Surname** and **Given Name**.

SA Government Employment Status

The processing requirements for a new contract vary depending on the employee's SA Government employment status and the term of the contract.

Confirm the employee's status by selecting yes/no as required to access the form applicable to the employee's specific circumstances.

Recruitment/Position Details > Select the applicable Recruitment options. Enter the **Position Number.**

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Work Address Details > Enter the address details – all fields are mandatory.

New Employment/Contract Details > Enter the contract details.

Ensure the Contract End Date is not after the Position Expiry Date.

Cost Split > If a cost split is required, enter the **Cost Centre Codes** and **Percentage**.

Salary Details > Enter the **Classification** and **Increment Level**.

Pay Type & Electronic Roster or Leave Paid System Details

> Select the **Pay Type** & **Electronic Roster /Leave System** as required.

Allowance Details > If an allowance applies, select the **Type of Allowance** from the drop-down list and enter the **Start Date** and **End Date** and **Original Start Date**. Complete all other fields applicable to the allowance as required.

Right to Further Employment Details > If applicable, complete the appropriate fields.

Include employee's substantive classification for HR purposes.

Roster Details > If a roster applies, select the **Number of Roster Cycles** from the drop-down list. Enter **the Start Date, Current** and **New Work Hours**, and all other fields applicable to the Roster as required.

Attach File > If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval > All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR02 EMPLOYMENT MANAGEMENT – Extend Contract Existing Employee

The sections available for completion in this Request Type are:

- Employee Details
- Position Details
- Work Address Details
- New Employment/Contract Details
- Salary Details
- Organisation Details (view only)
- Cost Splits
- Allowance Details
- Right to Further Employment Details
- Roster Details
- Attach File
- Submission and Approval
  - Completed By
  - Delegates
  - Employee
  - HR or Finance

To complete Optional sections, select YES from the drop down

Employee Details

Enter the **Employee Number**, **Surname**, **Given Name** and **Originating Agency**.

Recruitment/Position Details

Enter the **Position Number** and **Vacancy Number** if applicable.

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

New Employment/Contract Details

Enter the contract details.

Ensure the Contract End Date is not after the Position Expiry Date.

Salary Details

Enter the **Classification** and **Increment Level**.

Cost Split

If a cost split is required, enter the **Cost Centre Codes** and **Percentage**.

Allowance Details

If an allowance applies, select the **Type of Allowance** from the drop-down list and enter the **Start Date, End Date** and **Original Start Date** (if the allowance is being extended).
Complete all other fields applicable to the allowance as required.

Right to Further Employment Details > If applicable, complete the appropriate fields.

Include employee's substantive classification for HR purposes.

Roster Details

If a roster applies, select the **Number of Roster Cycles** from the drop-down list. Enter the **Start Date, Current** and **New Work Hours**, and all other fields applicable to the Roster as required.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR02 EMPLOYMENT MANAGEMENT – Permanent Assignment

The sections available for completion in this Request Type are:

- Employee Details
- Recruitment/Position Details
- Work Address Details
- New Employment/Contract Details
- Salary Details
- Organisation Details (view only)
- Cost Splits
- Pay Type & Electronic Roster OR Leave Paid System Details
- Allowance Details
- Right to Further Employment Details
- Roster Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Employee Details > Enter the Employee Number, Surname and Given Name.

Recruitment/Position Details > Select the applicable Recruitment options. Enter the **Position Number.**

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Work Address Details mandatory when updating work address details.

New Employment/Contract Details > Enter the contract details.

Ensure the Contract End Date is not after the Position Expiry Date.

Salary Details > Enter the **Classification** and **Increment Level**.

Cost Split > If a cost split is required, enter **the Cost Centre Codes** and **Percentage**.

Pay Type & Electronic Roster or Leave Paid System Details > Select the **Pay Type** & **Electronic Roster /Leave System** as required.

Allowance Details > If an allowance applies, select the **Type of Allowance** from the drop-down list and enter the **Start Date, End Date** and **Original Start Date** (if the allowance is being extended). Complete all other fields applicable to the allowance as required.

This request type applies to Internal Assignments, i.e. within the employee's current Agency (ABN).

Right to Further Employment Details > If applicable, complete the appropriate fields.

Include employee’s substantive classification for HR purposes.

Roster Details > If a roster applies, select the **Number of Roster Cycles** from the drop down list. Enter the **Start Date, Current** and **New Work Hours,** and all other fields applicable to the Roster as required.

Attach File > If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval > All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate’s Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR02 EMPLOYMENT MANAGEMENT – Temporary Assignment

The sections available for completion in this Request Type are:

- Employee Details
- Recruitment/Position Details
- Work Address Details
- New Employment/Contract Details
- Salary Details
- Organisation Details (view only)
- Cost Splits
- Pay Type & Electronic Roster OR Leave Paid System Details
- Allowance Details
- Right to Further Employment Details
- Roster Details
- Attach File
- Submission and Approval

- Completed By
- Employee
- Delegates
- HR or Finance

To complete Optional sections, select YES from the drop down

Employee Details > Enter the Employee Number, Surname and Given Name.

Recruitment/Position Details > Select the applicable Recruitment options. Enter the **Position Number.**

Once the Position Number is entered, sections of the form will populate with the current position data in CHRIS 21.

Work Address Details > mandatory when updating work address details.

New Employment/Contract Details > Enter the contract details.

Ensure the Contract End Date is not after the Position Expiry Date.

Salary Details > Enter the **Classification** and **Increment Level**.

Cost Split > If a cost split is required, enter the **Cost Centre Codes** and **Percentage**.

Pay Type & Electronic Roster or Leave Paid System Details > Select the **Pay Type** & **Electronic Roster /Leave System** as required.

Allowance Details > If an allowance applies, select the **Type of Allowance** from the drop-down list and enter the **Start Date, End Date** and **Original Start Date** (if the allowance is being extended). Complete all other fields applicable to the allowance as required.

This request type applies to Internal Assignments, i.e., within the employee's current Agency (ABN).

Right to Further Employment Details > If applicable, complete the appropriate fields.

Include employee's substantive classification for HR purposes.

Roster Details > If a roster applies, select the **Number of Roster Cycles** from the drop-down list. Enter the **Start Date, Current** and **New Work Hours**, and all other fields applicable to the Roster as required.

Attach File > If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval > All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here… button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

Complete this Request Type when an employee leaves the Public Sector Permanently.

The sections available for completion in this Request Type are:

- Employee Details
- Termination Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Employee Details

Enter the **Employee Number, Surname** and **Given Name**.

Termination Details

Select the **Termination Reason** and enter the dates for **Last Day on Duty** and **Last Day of Service**, noting they could be different. Complete all other fields as required.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate's Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed select, the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR02 EMPLOYMENT MANAGEMENT – Separation

The sections available for completion in this Request Type are:

- Employee Details
- Separation Details
- Attach File
- Submission and Approval
  - Completed By
  - Employee
  - Delegates
  - HR or Finance

To complete Optional sections, select YES from the drop down

Complete this request type when an employee is separating from their current Agency but not terminating SA Government employment i.e. secondment.

Employee Details

Enter the Employee Number, Surname and Given Name.

Separation Details

Select the **Separation Reason** and enter the dates for **Last Day on Duty** and **Last Day of Service**, noting they could be different. Complete all other fields as required.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Submission and Approval

All details in each Submission and Approval section must be completed as applicable to the request and Agency requirements.

- Form Completed By – is the person completing the request type and is mandatory to complete.
- Delegate’s Approval – is mandatory to complete.
- Additional Sign-Offs – Employee, Finance & HR sign offs are optional; complete as per each Agency's requirements.

Once each stage is completed, select the Click here... button within the section to progress the form to the next stage, noting as above that some stages are optional.

Refer to each Agency's HR Delegations to determine who has delegation to approve the request.

HR03 EMPLOYEE DETAILS MANAGEMENT

Audience

- Managers (Delegates)
- Administration Support
- Human Resources

When to use

To create a New Employee or change Employee Details.

Before you start

You will be prompted to *Enable Content (macros)* upon opening the form. Once enabled, the Smart Forms will populate position information from the data held in CHRIS 21, reducing the manual input required.

Once you have enabled macros, select the correct Agency and the applicable Request Type. Once the Request Type is selected, the form will display only the sections applicable to the request.

Notes

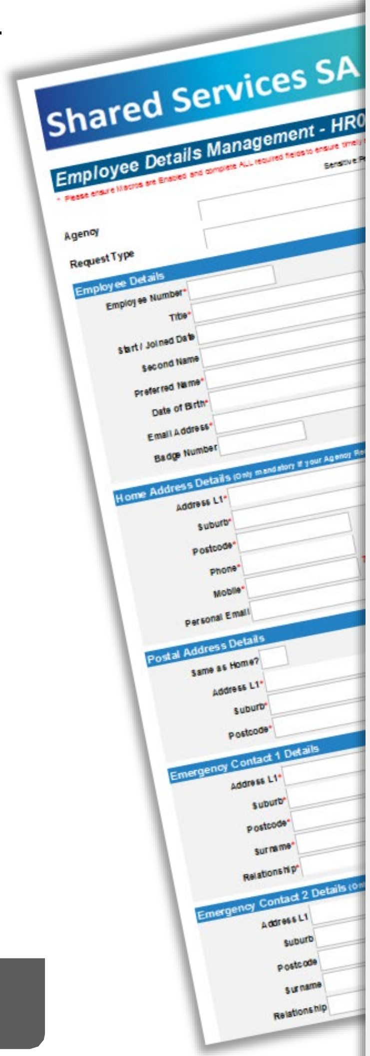
Optional sections will not display initially; to complete these sections, select YES from the drop down.

Mandatory fields are flagged with a Red * and these fields must be completed.

Field specific assistance (tool tips) will display when the field is selected. Some fields also have a Help button which will provide more information.

To save a copy of the form, use the in-built Save Copy button.

Click to view HR form troubleshooting



Click the Request Type for more details

New Employee

Update Address Details

Update Education Details

Update Employee Details

Update Police Check/Screening Clearance Details

Update Visa Details

HR03 EMPLOYEE DETAILS MANAGEMENT – New Employee

The sections available for completion in this Request Type are:

- Employee Details
- Address Details
  - Home
  - Postal
  - Emergency 1
  - Emergency 2
  - Work
- Bank Details
- Diversity Details
- Disability Details
- Visa Details
- Education Details
- Police Check/Screening Clearance Details
- Attach File
- Employee Approval

To complete Optional sections, select YES from the drop down

Employee Details

Enter the employee details by typing or selecting the applicable options from the drop down lists.

Leave the Employee Number field blank when creating a New Employee.

Address Details

Enter the details for each address type: **Home, Postal, Emergency 1, Emergency 2** and **Work** as required.

Bank Details

Enter the employee bank details including: **BSB Number, Account Number** and **Account Name** for the disbursement of salary.

Diversity Details

Select the appropriate radio button indicating **Indigenous Status**. Then from the drop-down lists, select the applicable options relating to **Ethnicity**.

Disability Details

Select the applicable radio button indicating Disability Indicator. Then from the drop-down lists, select the applicable options relating to Disability.

For a definition of Disability, refer to Section 4 of the Commonwealth Disability Discrimination Act 1992.

Visa Details

If a Visa is held, enter the specific details including **Number, Dates** and **Condition** if applicable.

Education Details

If applicable, enter the specific details of **Qualifications** held. To record multiple qualifications, use the Click here.. button to add another education section.

Police Check/Screening Clearance Details

Enter the details of **Police Clearance/s** held. To record multiple clearances, use the Click here.. button to add another police check section.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Employee Approval

Complete all details and then select the Click here… button to attach the form to an email for sending.

HR03 EMPLOYEE DETAILS MANAGEMENT – Update Address Details

The sections available for completion in this Request Type are:

Employee Details

Address Details

- Home
- Postal
- Emergency 1
- Emergency 2
- Work

Employee Approval

To complete Optional sections, select YES from the drop down

User this request type to update an existing employee's address details.

Employees with access to HR21 are required to update these details online. Instructions on how to do this are located here.

Employee Details

Enter the **Employee Number, Surname** and **First Name.**

Address Details

Enter the new details for the address type/s being updated. For example, **Home, Postal, Emergency 1, Emergency 2** and **Work**.

When updating Home Address, please consider whether it is necessary to update the Postal Address as well.

Employee Approval

Complete all details and then select the Click here... button to attach the form to an email for sending.

HR03 EMPLOYEE DETAILS MANAGEMENT – Update Education Details

The sections available for completion in this Request Type are:

Employee Details

Education Details

Attach File

Employee Approval

To complete Optional sections, select YES from the drop down

Employee Details

Enter the **Employee Number, Surname** and **First Name**.

Education Details

Provide the specific details of the qualification; enter the **Atta**ined **Date** and select from the drop down lists the applicable **Australian Qualification Framework Level, ABS Qual Code, Institution Code/Name** and **Country**.

Agency Cost is only required if the qualification has been funded, even in part, by the Agency.

To record multiple qualifications, use the Click here.. button to add another education section.

Education details will not be recorded in CHRIS 21 unless they have been sighted and confirmed by the required third party.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.
Employee Approval

Employee Approval

Complete all details and then select the Click here... button to attach the form to an email for sending.

HR03 EMPLOYEE DETAILS MANAGEMENT – Update Employee Details

The sections available for completion in this Request Type are:

- Employee Details
- Attach File
- Employee Approval

To complete Optional sections, select YES from the drop down

Employee Details

Enter the details to be updated in the applicable fields. All mandatory fields must be completed, even if there is no update to the other existing details.

Ensure supporting documentation is submitted with the form as required. For example, if updating a Surname, the official name change documentation must be submitted with the form.

Attach File

If supporting documentation is required, select the Attach File button to upload a document/file.

Employee Approval

Complete all details and then select the Click here... button to attach the form to an email for sending.

HR03 EMPLOYEE DETAILS MANAGEMENT – Update Police Check Details

The sections available for completion in this Request Type are:

- Employee Details
- Police Check/Screening Clearance Details
- Attach File
- Employee Approval

To complete Optional sections, select YES from the drop down

Employee Details

Enter the Employee Number, Surname and First Name.

Police Check/Screening Clearance Details

Select from the drop-down list the type of the Clearance/Police Check attained. Enter the Date Acquired, Next Review Date and any Comments if applicable.

To add multiple clearances, use the Click here.. button to add another police check section.

In some instances, proof of clearances will be required to be sent with this form before the information can be entered in CHRIS 21.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Employee Approval

Complete all details and then select the Click here... button to attach the form to an email for sending.

HR03 EMPLOYEE DETAILS MANAGEMENT – Update Visa Details

The sections available for completion in this Request Type are:

- Employee Details
- Visa Details
- Attach File
- Employee Approval

To complete Optional sections, select YES from the drop down

Employee Details

Enter the **Employee Number**, **Surname** and **First Name**.

Visa Details

Enter the **Visa Number, Type, Date Applied, Date Granted, Expiry Date** and **Condition** if applicable.

In some instances, proof of Visas will be required to be sent with this form before the information can be entered in CHRIS 21.

Attach File

If supporting documentation is required, select the Attach File button to attach document/file.

Employee Approval

Complete all details and then select the Click here... button to attach the form to an email for sending.

TROUBLESHOOTING

	ISSUE	REASON	ACTION REQUIRED
1	I have entered the Position Number but no details have populated.	The population of data from CHRIS 21 is dependent on the macros being enabled when the form is opened.	Close the form and download again from the CHRIS 21 website, ensuring macros are enabled when prompted.
2	The form hasn't loaded properly, i.e. I was not prompted to/are unable to enable macros.	Microsoft Excel versions and settings vary across government and this can impact the functionality of the form.	Close all Excel windows, clear your cache and download the form from the CHRIS 21 Website again. If issues continue, your ICT department can provide Excel troubleshooting assistance.
3	When I enter the Position Number, an error message appears advising the position cannot be found.	There are 3 sets of Smart Forms available, with each set linked to a group of Agencies, populating data from different databases.	Download the form applicable to your Agency: • DCSI, Families SA, EECSRSB or Renewal SA • SA Health • All other Shared Sector Agencies.
4	I have entered the Position Number but *no* details or *incorrect* details have populated.	Form data is updated on a daily basis. Where a position is created or updated on the day the form is completed, the new details will not yet be available.	If urgent, complete the form by overwriting the editable fields with the required details. Alternatively, complete the form the following business day.
5	I am experiencing Outlook issues, i.e. an email doesn't open when I select the applicable *Click here…* button.	Outlook versions and settings vary across government; this and network connection issues can impact Outlook based functionality.	To work around Outlook issues, you can save a copy of the completed form locally, which you can then attach to a new email. If issues continue, your ICT department can provide Outlook troubleshooting assistance.
6	I'm unsure what detail to provide in a certain field and am unable to submit the form without completing.	Mandatory fields are flagged with a red * and these fields must be completed as the information is required to process the request.	Click in the field to view field specific assistance (tool tips). If you are still unsure of what selection to make, refer to your Agency's guidelines on Position and Employee data management or seek assistance from HR Support.