PeopleSoft HR

ECR Automation Process:

Return from Leave
&
Return from Short-Term Disability

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Create a Return from Leave of Absence –or– a Return from Short-Term Disability

In order to ‘return’ an employee from Leave of Absence or STD, an automated ECR must be created by the employee’s department administrator (Originator). It will be reviewed/approved by the appropriate offices based on the funding involved, and lastly, entered into PeopleSoft HR by the Human Resources Service Center (HRSC).

Before creating a Return from Leave or Return from Short-Term Disability ECR for an employee, the Originator should determine:

- The **Effective Date** the return will occur – that is, the first day the employee will return to work.

When the Originator is ready to create a Return from Leave or STD using the automated ECR process, he/she will follow the menu navigation below to access the employee search page and then follow the set of instructions below:

**Navigation:** Home > Employee Change Request (ECR) > Use > ECR Create
Employee Search Page:
(to call-up the employee)

- If you know the Name or Eagle ID of the employee, type it into the appropriate field and click Search. A search can still be performed if you only have a partial name or Eagle ID. (The Name fields are not case-sensitive.)

ECR Employee Search Page:
(to call-up the desired ECR Action & Effective Date)
1. **Verify that the Eagle ID & Name** of the employee for whom the transaction is being done is correct.

2. Enter the **Effective Date** of the Return. 
   *(This is the Effective Date that will be reflected in PeopleSoft HR once the transaction is complete.)*

3. Select either, “Return from Leave” or “Return from Short-Term Disability” from the **ECR Action** drop down field.

4. Click the **Search** button to display the **Employee Jobs** for the employee. This will display all of the job records within the security access of the Originator, and allows the Originator to select which job record to associate with this ECR Action.

   **ECR Create Page**  
   *(To call-up a list of the Employee’s Jobs & “Create” the ECR)*

5. Click the **Create ECR** button next to the Job Record whose current ‘Empl Status’ is either Leave of Absence, or STD, to begin creating the Return from Leave/Return from STD transaction.

   **NOTE:** Any other ECR transactions that are pending or have been processed for the employee will also display under the **Change Request Status** section of the page, for your reference.
Return from Leave or STD ECR Request Page

After clicking “Create ECR”, the following screen will display:

![Screenshot of Return from Leave Form]

**NOTE:** HR information specific to the employee, including important information for processing a Return from Leave has been captured in the top section of the screen.

This employee data is specific to the job being updated.

This data displays current information as of the effective date that has been chosen for the ECR.

It will not display any future-dated information for the employee. *(i.e. Any dates beyond the effective date that’s been chosen for the ECR.)*

- The **Other Job Records** link opens a screen that displays other job records the employee has (if applicable) that the user has security access to view:

![Screenshot of Other Job Records]

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6. To continue, select a **Transaction Type**.

**NOTE:** Depending on whether you’re processing a Return from a Leave of Absence, or a Return from STD, you will be able to select from one of the following Transaction Types:

- Return from Leave
- Return Leave w/ Earn Dist
- Return from Disability
- Return Disability w/ Earn Dist

**If you wish to create a Return from Leave/STD which includes an Earnings Distribution change** - please refer to that section of this guide, starting on Page 9.

Verify the FICA Status of the employee. This is very important when processing a Return from Leave, in particular if the employee is a foreign employee.

Verify that the Effective Date of the return is the same as you entered on the ECR Employee Search page. If not, return to the Search page and enter the correct value.
7. Originators and Approvers can enter Comments as they go through the process. These will appear on the Workflow Tab and can be viewed by anyone involved in the approval path from the Originator to the HRSC. They can also be referenced at any time after the transaction has been completed.

8. Click the Submit Button when all required information has been entered. This will begin the automated workflow, and will assign a Request ID to the transaction.
Return from Leave/STD with Earnings Distributions Page

9. To process a Return from Leave or STD with Earnings Distribution changes, you may follow steps 1 through 5 from this guide to create the ECR.

10. Once the “Create ECR” button has been clicked – you may now select the Transaction Type of either:

   “Return from Leave w/ Earn Dist” or “Return from Short-Term Disability w/ Earn Dist”

Verify the FICA Status of the employee. This is very important when processing a Return from Leave, in particular if the employee is a foreign employee.

11. Verify that the Effective Date of the return is the same as you entered on the ECR Employee Search page. If not, return to the Search page and re-enter the correct value.
12. Originators and Approvers can **enter Comments** about the leave as they go through the process. These will appear on the Workflow Tab and can be viewed by anyone involved in the approval path from the Originator to the HRSC. They can also be referenced at any time after the transaction has been completed.

13. Click the **Submit** Button when all required information has been entered. This will begin the workflow and assign a Request ID to the transaction.
Return from Leave/STD Comments & Workflow Tracking Page

- After the Return from Leave/STD request is submitted, the workflow approval path is displayed on the second tab called “Comments/Workflow Tracking”. This will show each department area that must approve the transaction before it is processed in PeopleSoft. It will also show those departments that receive an email notification of the transaction.

- The request can be viewed by the Originator and the Approvers at any point during the workflow process for a status update. Instructions on how to do this are outlined in the next 2 pages.
ECR Transaction Inquiry  
(To look up an existing ECR)

To view a transaction that is in process or already completed, follow the menu navigation below:

Home > Employee Change Request (ECR) > Inquire > ECR Inquire
1. In the top section of the ECR Employee Search page, the user can search by any field or combination of fields to locate an existing ECR. (It is also useful as a tool for reviewing ECR data already housed in the system.)

2. Click the Search button to display any ECR Requests that meet the search criteria entered. If a broader search is done against certain fields, the data can be downloaded to Excel by selecting the spreadsheet button to the far right of the header. (Example: If searching broadly, by ‘all Transaction types’ within a large date range – there may be many ECR results found.)

3. Click the Select button next to the request to pull up a specific ECR transaction. (Note: All of the fields will be grayed out except for the current Approver of the transaction. If the ECR has already been fully processed, then all fields will be grayed out.)
Cancel an ECR Transaction Request

To cancel a request that has been submitted, you must first locate and access the ECR using the ECR Inquire option, using the navigation below. (For a refresher on how to use the ECR Inquire Page, you may refer back to pages 12-13 of this guide)

Home > Employee Change Request (ECR) > Inquire > ECR Inquire
About the ECR Cancel Process:

- The Originator is the only one who can cancel an ECR Transaction Request.
- A request can be cancelled at any point during the approval process before the status is updated to ‘Completed’.
- First, enter a comment related to the cancellation (a comment is required to proceed).
- Select ‘Cancel’ at the bottom of the Inquiry Page.
- Confirm the status has been updated to ‘Cancelled’.
- Upon cancellation, an email notification is sent to the next pending Approver and all prior Approvers in the workflow, indicating the transaction has been cancelled.
Approve or Deny an ECR Transaction Request

1. An Approver has the option to access and view his/her transactions by either navigating to the Worklist, or by clicking through the ECR Inquiry menu:

   Home > Employee Change Request (ECR) > Inquire > ECR Inquire

2. The Worklist allows the user to filter on the different types of transactions that come through the ECR workflow. The Return from Leave and Return from STD Work List Filter name is: ‘Review Return Transaction’ (shown on screen as “Review Return Trxn”). This will display only those items under the selected filter.

3. Each Worklist item is defined by a link that displays: the Employee’s Name, Eagle ID, and Effective Date of the transaction. Click on this link to go directly to the ECR transaction page and review the information.
4. If the information provided is accurate, the approver will click ‘Approve’ to advance the workflow to the next approver on the list. The Comments/Workflow Tracking tab indicates the ECR’s routing path, and where it is in the process. It will reflect updated information after each step.

If the information is not correct for any reason, the Approver has the option to Deny the request. This will send a notification email and the ECR request directly back to the Originator with a required comment as to why it has been denied. The Originator now has the option to either Resubmit the request, or to Cancel the request.
Resubmit or Cancel a Denied ECR Transaction Request

1. An Originator has the option to access and view his/her transactions by either navigating to the Worklist, or by clicking through the ECR Inquiry menu:

   **Home > Employee Change Request (ECR) > Inquire > ECR Inquire**

2. The Worklist allows the user to filter on the different transactions that come through the ECR workflow. The Return from Leave filter name is ‘Review Leave Transaction’ (shown as Review Leave Trxn). This will display only those items under the selected filter.

   Worklist for BURKE: Jack Burke

<table>
<thead>
<tr>
<th>Worklist</th>
<th>Work List Filters:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Review Return Transaction</td>
</tr>
<tr>
<td>Fudd, Elmer, 12345678</td>
<td></td>
</tr>
</tbody>
</table>

3. Each Worklist item is defined by a link that displays: the Employee’s Name, Eagle ID, and Effective Date of the transaction. Click on this link to go directly to the ECR transaction page and review the information.
5. **If a request is Denied**, the Originator can either make changes to the request and **Resubmit** it, or **Cancel** the request altogether. (The Originator may also choose to Cancel an ECR request at any point while the ECR is in a ‘pending approval’ workflow status.)

   Note: In either case of a Resubmit or a Cancel, a **Comment** about the action is required.
6. **When a request is Resubmitted,** the workflow will readjust according to the changes made, and begin the approval routing cycle again. It will display all activity pertaining to the request, including the resubmission through to completion.

7. **When a request is Cancelled,** the workflow will be deleted, and an email notification will be sent to those individuals who had already Approved or Denied the transaction prior to the cancellation. This notification is to inform them that the Originator has cancelled the request.
NOTES ABOUT “ECR STATUSES”:

- **Request ID and Status** will default to ‘NEW’ until the transaction has been submitted. Once submitted, the **Status** will update as the transaction goes through the process.

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Request</td>
<td>The status defaults to ‘New’ when the request is first opened. The Request ID defaults to ‘New.’</td>
</tr>
<tr>
<td>Pending (area) Approval</td>
<td>The status is ‘Pending (area) Approval’ while waiting for approver action: Approve or Deny. **Possible approval areas are: Office of the Provost, Benefits, Office of Sponsored Projects (OSP), Controller’s Office, Endowment, Foreign Tax, and HRSC.</td>
</tr>
<tr>
<td>Denied</td>
<td>The status is set to ‘Denied’ when the request is denied by an approver. Upon denial, the request is routed back to the originator. At this point, the originator can either cancel or resubmit the request. On resubmit, the Request ID remains the same as the original submittal.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The status is ‘Cancelled’ when the request is cancelled by the originator. No further activity allowed on this request. The Originator can simply choose to submit a new ECR, or not.</td>
</tr>
<tr>
<td>Manual Update</td>
<td>The status is ‘Manual Update’ when the HRSC representative presses the ‘Manual Update’ button. In these cases, the request must be entered into PeopleSoft manually. (This is done in the event of a system error, or if the rep determines that a manual update is required due to functional constraints.) The transaction is now complete. The Originator will receive notification of the manual update, but no further activity is allowed on this request. (The HRSC does however, have the ability to continue adding descriptive comments as needed.)</td>
</tr>
<tr>
<td>Completed</td>
<td>The status is ‘Completed’ when the HRSC representative presses the ‘Update Job’ button and the data is entered successfully into PeopleSoft via the automated data entry feature. <em>(Unlike the manual update feature.)</em> No further activity is allowed on this request but again, the HRSC has the ability to add comments as needed.</td>
</tr>
</tbody>
</table>