

PeopleSoft HR

ECR Automation Process

Short Term Disability with Pay

May 2011

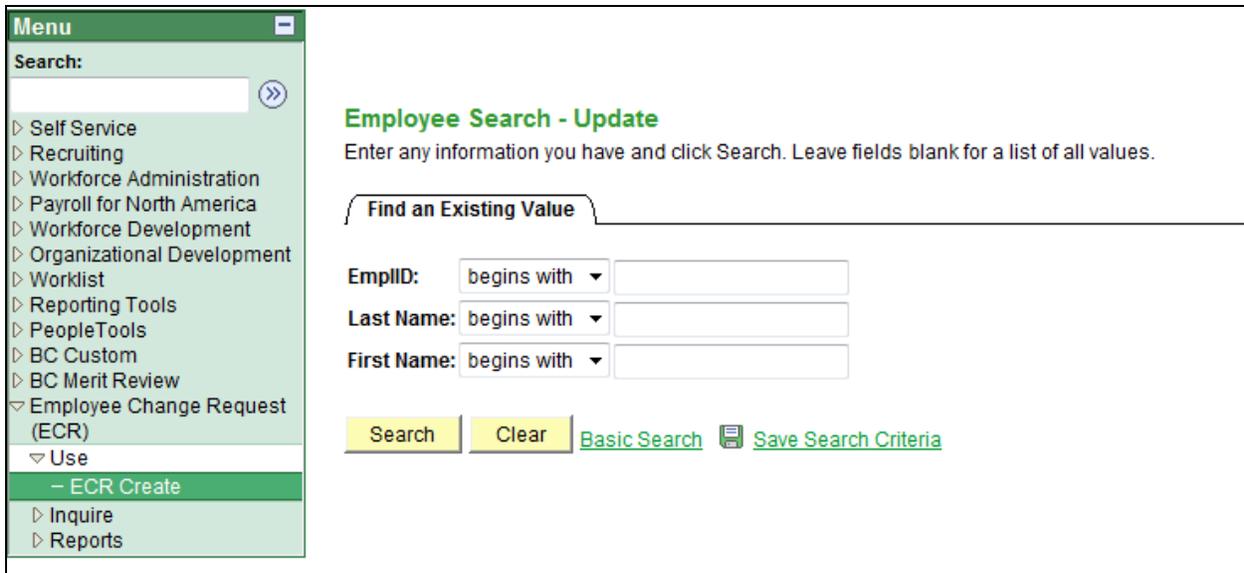
Processing a Short Term Disability with Pay

ECR Search Page



To process a Short Term Disability using the automated ECR process, follow the menu navigation below:

Home > Employee Change Request (ECR) > Use > ECR Create



- If you know the Name or Eagle ID of the employee, type it into the appropriate field. A search can still be performed if you only have a partial name or Eagle ID.

NOTE: The Name fields are not case sensitive.

ECR Search Page

ECR Employee Search

Employee Search Criteria

Empl ID: 20168550 Fudd, Elmer A **1**

Effective Date: **2**

ECR Action: **3**

4

Below is a list of all job records for this employee for which you have access as of the effective date above. To create an ECR, first select the Action then click the Create ECR button.

Employee Jobs									
Rcd#	Eff Date	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
<input type="button" value="Create ECR"/>	0								<input type="checkbox"/>

Below is a list of ECRs that have been created for the jobs listed above. To view more information about the request or to cancel a request, click on the Select button.

Change Request Status									
Select	Request ID	Rcd#	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
<input type="button" value="Select"/>		0							

1. Verify the Eagle Id and Name of the employee for whom the transaction is being done.
2. Enter the Effective Date of the Short Term Disability. This is the Effective Date that will be reflected in PeopleSoft HR.
3. Select “**Short Term Disability with Pay**” from the ECR Action drop down field.
4. Click the Search button to display the Employee Jobs for the employee. This will display all the job records within the security access of the originator. This allows the user to determine which job record to select and run the Create ECR process.

ECR Search Page

ECR Employee Search

Employee Search Criteria

Empl ID: 69215714

Effective Date: 06/11/2011

ECR Action: Short Term Disability with Pay

Below is a list of all job records for this employee for which you have access as of the effective date above.
To create an ECR, first select the Action then click the Create ECR button.

Employee Jobs										Customize Find First 1-3 of 3 Last
	Rcd#	Eff Date	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
<input type="button" value="Create ECR"/>	0	09/01/2003	Terminated	Termination	NJA-No Job Activity Job Term'd	059001	Dean, Gssw	00008173	Part Time Faculty	<input type="checkbox"/>
<input type="button" value="Create ECR"/>	1	06/01/2003	Terminated	Termination	NJA-No Job Activity Job Term'd	059001	Dean, Gssw	00008173	Part Time Faculty	<input type="checkbox"/>
<input type="button" value="Create ECR"/>	2	06/01/2011	Active	Pay Rate Change	ANN-Annual Merit Increase	059021	Gssw Field Office	00010957	Field Education Specialist	<input checked="" type="checkbox"/>

5. Click the Create ECR button next to the job record to process the Short Term Disability.

NOTE: Any ECR transactions that have been processed for the employee will also display under the **Change Request Status** section of the page.

ECR Short Term Disability Request Page

Change Request

Comments/Workflow Tracking

SHORT TERM DISABILITY

Request ID: NEW	EmplID: 69215714	Total Number of Records: 3	Other Job Records
Status:	Name:	Rcd#: 2	

Empl Status: Active	Benefit Program: <input checked="" type="checkbox"/> Primary	
Department: 059021	BC Annual Salary:	Benefits Base: \$39,046.000
Position: 00010957	Comp Rate:	Periods/Yr: 12.00
Job Code: 249550	Pay Group: MON	Comp Freq: M
Citizenship:	Reg/Temp: Regular	FT/PT: Part-Time
Visa Type:	Empl Class: B-PtAdmin	Std Hrs: 21.00
Visa Exp Dt:	Service Date: 09/01/1991	Rehire Date: 09/01/1991
	Hire Date: 09/01/1991	<input checked="" type="checkbox"/> BC Budgeted Position

Information specific to the employee and important for processing a Short Term Disability has been identified and captured in the top section of the screen. This information is reflective of the data specific to the job being updated. This data displays current information as of the effective date. It will not display future dated information for the employee.

NOTES:

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

Status	Definition
New Request	The status defaults to ‘New Request’ when the request is first opened. The Request ID defaults to ‘New.’
Pending (area) Approval	The status is ‘Pending (area) Approval’ while waiting for approver action: Approve or Deny. Possible approval areas are: Office of the Provost, Restricted Funds, Compensation, Position Management, Foreign Tax, and HRSC.
Denied	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 may cancel or resubmit the request. On resubmit, Request ID remains the same as original.
Cancelled	The status is ‘Cancelled’ when the request is cancelled by the originator. No further activity allowed on this request.
Manual Update	The status is ‘Manual Update’ when the HRSC rep presses the ‘Manual Update’ button. The request must be entered into Job Data manually. This is done in the event of a system error or if the rep determines that a manual update is required. The request is complete. No further activity allowed on this request however, the HRSC has the

	ability to add a comment. The Originator will receive notification of the manual update.
Completed	The status is 'Completed' when the data is entered successfully into PeopleSoft. No further activity allowed on this request however, the HRSC has the ability to add a comment.

- 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.

EmpID:	Name: Stephen B							
Other Job Records for which you have access 1 of 1								
<u>Rcd #</u>	<u>Effective Date</u>	<u>Empl Status</u>	<u>Action</u>	<u>DeptID</u>	<u>Dept Name</u>	<u>Position</u>	<u>Position Title</u>	<u>Primary</u>
0								<input type="checkbox"/>

ECR Short Term Disability Page (Lower Section)

Change Request
Comments/Workflow Tracking

SHORT TERM DISABILITY

Request ID:	NEW	EmplID:	Total Number of Records:	1	Other Job Records
Status:		Name:	Rcd#:	0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 025105	BC Annual Salary:	Benefits Base: \$
Position: 00011492	Comp Rate:	Periods/Yr: 12.00
Job Code: 242420	Pay Group: MON	Comp Freq: M
Citizenship:	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 06/09/2003	Rehire Date: 06/09/2003
	Hire Date: 06/09/2003	<input checked="" type="checkbox"/> BC Budgeted Position

Transaction Type: Short Term Disability with Pay

Funding Accounts: [Find](#) | [View All](#) | First Last

Start Date: 04/01/2008 Stop Date:

Account Codes: [Find](#) | [View All](#) | First Last

Account Code: 25105-100-10000-51100D001										
DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
025105	100	10000	00000		00000	401	51100	MRG	100.000	D001

*FICA Status-Employee 6

Short Term Disability

Effective Date: 06/11/2011 Action: STD Change Reason: 7 Earn Code: NPY

Vacation Additional Data

Applied Vacation Time

*BC Days Hours:

Vacation: 8

Sick:

Comments:

9

Comments:

10

Submit 11

[Return to Search](#)

6. Verify the FICA Status of the employee. This is very important when processing a Short Term Disability. In particular, if the employee is a foreign employee.

7. The Change Reason will default in as Short Term Disability with Pay and will be grayed out. This is the only reason used and cannot be changed. At this point, a discussion has most likely taken place with the Benefits Office to determine effective date and correct type of leave.

8. Enter the vacation and sick time in the appropriate fields. They can be entered in days or hours based on the type of employee.

9. This comment field is used by the Originator only. It is for comments related to the vacation and sick time entered. Anything entered here is 'View Only' for all approvers throughout the process. The comments can be viewed in the comment box next to the vacation/sick fields.

Vacation Additional Data

Applied Vacation Time

*BC Days Hours: Days

Vacation: 5.00

Sick: 3.00

Comments:

This employee will be paid according to what is entered here. Please approve.

View as an approver

10. 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.

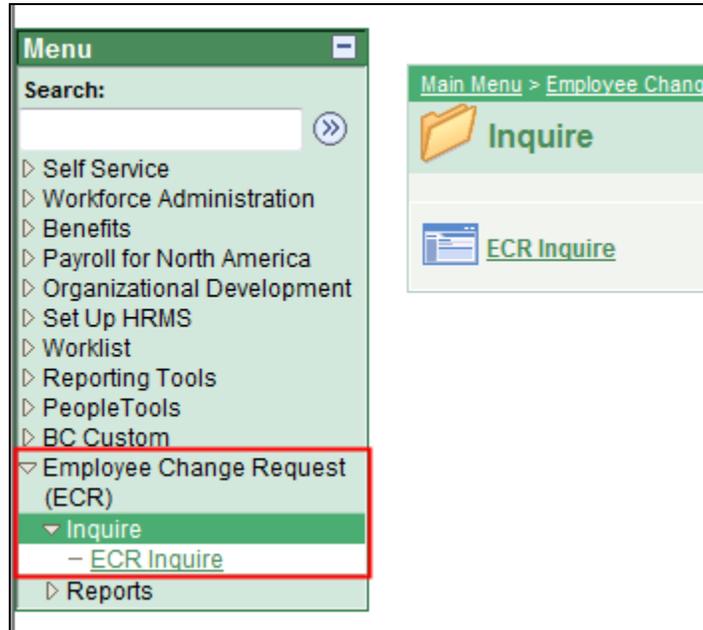
11. Enter the **Submit** Button when all the required information has been entered. This will begin the workflow and assign a Request ID to the transaction.

ECR Short Term Disability Comments/Workflow Tracking Page

Change Request		Comments/Workflow Tracking	
Request ID:	2162	ECR Status:	Completed
EmplID:	83018766	Rcd#:	0
Comments / Tracking 1-4 of 4			
User Name	DateTime	Action	Comment
Susan Hynes	05/03/2011 10:58AM	Submitted	-submitted for approval without comments-
Susan Hynes	05/03/2011 10:58AM	Approved	Approved as Originator
Jack Burke	05/03/2011 11:04AM	Approved	looks good from a benefits standpoint.
Maria Alvarez	05/03/2011 11:16AM	Approved	let's move forward.
Review Workflow Routing 1-5 of 5			
Description	Action	Oprid	DateTime Stamp
Originator	Originated	HYNESS	05/03/2011 10:58AM
Provost	Approved	HYNESS	05/03/2011 10:58AM
Benefits	Approved	BURKEJ	05/03/2011 11:04AM
HRSC	Approved	CRUZMC	05/03/2011 11:16AM
Employment	Job Updated	CRUZMC	05/03/2011 11:17AM

- After the Short Term Disability request is submitted, the workflow approval path is displayed on the second tab called 'Comments/Workflow Tracking'. This will show each department that must approve the transaction before it is processed in the HRSC. 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.

ECR Transaction Inquiry



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

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

ECR Employee Search

Enter any information you have and click Search. Leave all fields blank for a list of all values.

Request ID: 1 Department:

EmplID: Transaction Type:

Last Name: ECR Status:

First Name: From Date: BT Thru Date: BT

2

To view more information about a request, click on the Select button.

Employee Change Requests												
	ID	EmplID	Name	Rcd#	Eff Date	Action	Status	Originator	Current Owner	Last Updt Date	DeptID	Dept Name
3	Select			0								

1. In this top section, the user can enter any field and/or multiple fields to search for an ECR. It is also useful to review ECR data already in the system.
2. Hit 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. ()
3. Click the Select button next to the request to pull up a specific ECR Inquiry Page. All the fields will be grayed out except for the current approver of the transaction.

Canceling an ECR Transaction Request

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

Change Request **Comments/Workflow Tracking**

SHORT TERM DISABILITY

Request ID: 2164 EmplID: 69215714 Total Number of Records: 3 [Other Job Records](#)
Status: Pending Benefits Approval Name: Empl Rcd#: 2

Empl Status: Active	Benefit Program: <input checked="" type="checkbox"/> Primary	BC Annual Salary: \$39,046.000
Department: 059021	Comp Rate:	Periods/Yr: 12.00
Position: 00010957	Pay Group: MON	Comp Freq: M
Job Code: 249550	Reg/Temp: Regular	FT/PT: Part-Time
Citizenship:	Empl Class: B-PTAdmin	Std Hrs: 21.00
Visa Type:	Service Date: 09/01/1991	Rehire Date: 09/01/1991
Visa Exp Dt:	Hire Date: 09/01/1991	<input checked="" type="checkbox"/> BC Budgeted Position

Transaction Type: Short Term Disability with Pay

Funding Accounts: [Find](#) | [View All](#) First Last

Start Date: 11/01/2006 Stop Date:

Account Codes [Find](#) | [View All](#) First Last

Account Code: 59021-100-10000-53120D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
059021	100	10000	00000		00000	101	53120	MPR	100.000	D001

*FICA Status-Employee Subject

Short Term Disability

Effective Date: 06/11/2011 Action: STD Change Reason: Earn Code: NPY

Vacation Additional Data

Applied Vacation Time	Comments:
*BC Days Hours: <input type="text" value="Days"/>	<input type="text" value="please pay."/>
Vacation: <input type="text" value="10.00"/>	
Sick: <input type="text" value="2.00"/>	

Comments:

[Return to Search](#)

- 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'.
- 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 pending approver and prior approvers indicating the transaction has been cancelled.

Approve/Deny an ECR Transaction Request

Worklist for

Work List Filters: Review STD Transaction

From	Date From	Work Item	Worked By Activity	Priority	Link
Susan Hynes	05/03/2011	Review STD Transaction	BC_TRXN_DISABILITY		:69215714.06/11/2011

Mark Worked Reassign

1. An approver has the option to go through his worklist to view any transactions or through ECR > Inquiry to get to the transaction.
2. The worklist allows the user to filter on the different transactions that come through the worklist. The Short Term Disability filter name is 'Review STD Transaction'. This will display only those items under the selected filter.
3. Each worklist item is defined within 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 transaction page and review the information.

Change Request [Comments/Workflow Tracking](#)

SHORT TERM DISABILITY

Request ID: 2164	EmpID: 69215714	Total Number of Records: 3
Status: Pending Benefits Approval	Name:	Empl Rcd#: 2 Job Data Job Summary

Empl Status: Active	Benefit Program: <input checked="" type="checkbox"/> Primary	Benefits Base: \$39,046.000
Department: 059021	BC Annual Salary:	Periods/Yr: 12.00
Position: 00010957	Comp Rate:	Comp Freq: M
Job Code: 249550	Pay Group: MON	FT/PT: Part-Time
Citizenship:	Reg/Temp: Regular	Std Hrs: 21.00
Visa Type:	Empl Class: B-PtAdmin	Rehire Date: 09/01/1991
Visa Exp Dt:	Service Date: 09/01/1991	<input checked="" type="checkbox"/> BC Budgeted Position
	Hire Date: 09/01/1991	

Transaction Type: Short Term Disability with Pay

Funding Accounts: [Find](#) | [View All](#) | First Last

Start Date: 11/01/2006 **Stop Date:**

Account Codes: [Find](#) | [View All](#) | First Last

Account Code: 59021-100-10000-53120D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
059021	100	10000	00000		00000	101	53120	MPR	100.000	D001

***FICA Status-Employee:**

Short Term Disability

Effective Date: 06/11/2011 **Action:** STD **Change Reason:** **Earn Code:** NPY

Vacation Additional Data

Applied Vacation Time	Comments:
*BC Days Hours: <input type="text" value="Days"/>	<input style="width: 100%; height: 100%;" type="text" value="please pay."/>
Vacation: <input type="text" value="10.00"/>	
Sick: <input type="text" value="2.00"/>	

Comments:

[Return to Search](#)

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4. If the information provided is accurate, the approver will click 'Approve' to advance the workflow to the next approver on the list. The workflow tab indicates the route 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 request directly back to the originator with a required comment as to why it has been denied. The originator has the option to re-submit the request or to cancel the request.

SHORT TERM DISABILITY

Request ID: 2164	EmplID: 69215714	Total Number of Records: 3	Other Job Records
Status: Denied	Name:	Empl Rcd#: 2	

Empl Status: Active	Benefit Program: <input checked="" type="checkbox"/> Primary	Benefits Base: \$39,046.000
Department: 059021	BC Annual Salary:	Periods/Yr: 12.00
Position: 00010957	Comp Rate:	Comp Freq: M
Job Code: 249550	Pay Group: MON	FT/PT: Part-Time
Citizenship:	Reg/Temp: Regular	Std Hrs: 21.00
Visa Type:	Empl Class: B-PtAdmin	Rehire Date: 09/01/1991
Visa Exp Dt:	Service Date: 09/01/1991	<input checked="" type="checkbox"/> BC Budgeted Position
	Hire Date: 09/01/1991	

Transaction Type: Short Term Disability with Pay

Funding Accounts: Find View All First <input type="button" value="1 of 1"/> Last											
Start Date: 11/01/2006		Stop Date:									
Account Codes: Find View All First <input type="button" value="1 of 1"/> Last											
Account Code: 59021-100-10000-53120D001											
DeptID	Fund	Fund Srce	Program	ProjGrt	Property	Func	Account	Earn Code	Percent	Seq#	
059021	100	10000	00000		00000	101	53120	MPR	100.000	D001	

*FICA Status-Employee

Short Term Disability

Effective Date: 06/11/2011 Action: STD Change Reason: Earn Code: NPY

Vacation Additional Data									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr style="background-color: #4CAF50; color: white;"> <th colspan="2">Applied Vacation Time</th> </tr> <tr> <td>*BC Days Hours: <input type="text" value="Days"/></td> <td><input type="button" value="▼"/></td> </tr> <tr> <td>Vacation: <input type="text" value="10.00"/></td> <td></td> </tr> <tr> <td>Sick: <input type="text" value="2.00"/></td> <td></td> </tr> </table>	Applied Vacation Time		*BC Days Hours: <input type="text" value="Days"/>	<input type="button" value="▼"/>	Vacation: <input type="text" value="10.00"/>		Sick: <input type="text" value="2.00"/>		<p>Comments:</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>please pay.</p> </div>
Applied Vacation Time									
*BC Days Hours: <input type="text" value="Days"/>	<input type="button" value="▼"/>								
Vacation: <input type="text" value="10.00"/>									
Sick: <input type="text" value="2.00"/>									

Comments:

[Return to Search](#)

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5. If a request is denied, the originator can make changes to the request and Resubmit it or Cancel the request.

Request ID: 2163

ECR Status: Denied

EmplID: 35020710

Rcd#: 0

Comments / Tracking

1-3 of 3

User Name	DateTime	Action	Comment
Susan Hynes	05/03/2011 11:37AM	Submitted	-submitted for approval without comments-
Jack Burke	05/03/2011 11:58AM	Denied	no
Susan Hynes	05/03/2011 12:04PM	Submitted	TRY AGAIN WITH CORRECT DAYS

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Review Workflow Routing

1-4 of 4

Description	Action	Oprid	DateTime Stamp
Originator	Originated	HYNESS	05/03/2011 12:04PM
Benefits			
HRSC			
Employment			

[Change Request](#) | [Comments/Workflow Tracking](#)

6. When a request is resubmitted, the workflow will readjust according to the changes made and begin the routing cycle again. It will display all activity pertaining to the request, including the resubmission through to completion.