PeopleSoft HR

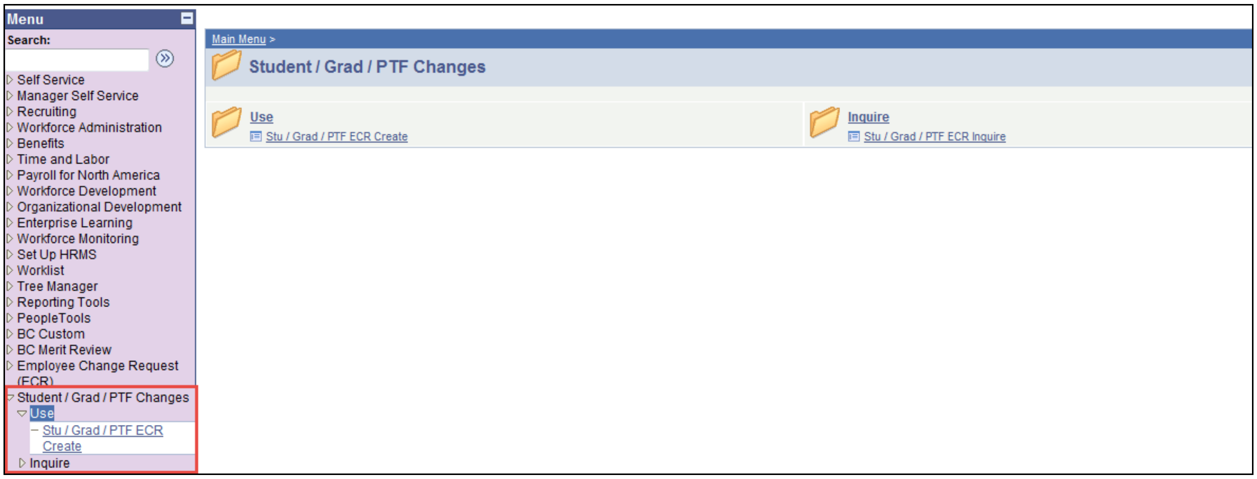
PTF/Grad/Hourly Student Automated Change Process

Pay Rate Changes/Job Earning Distributions/Terminations

October 2015

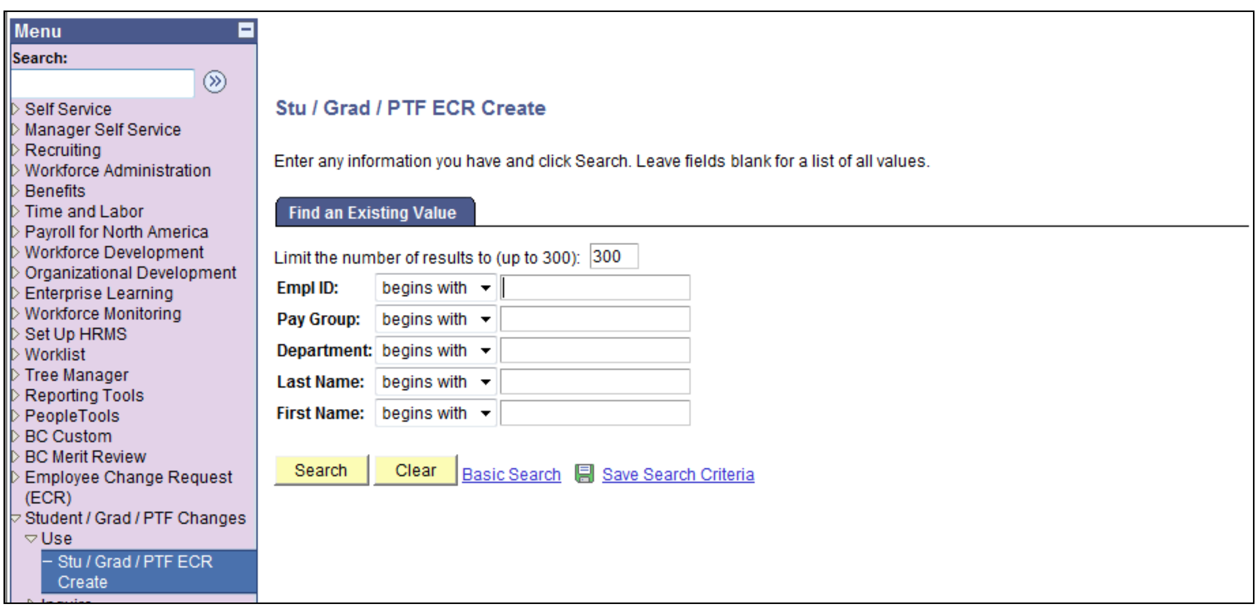
Processing a Pay Rate Change

Change Search Page



To process a Pay Rate Change using the automated Change process, follow the menu navigation below:

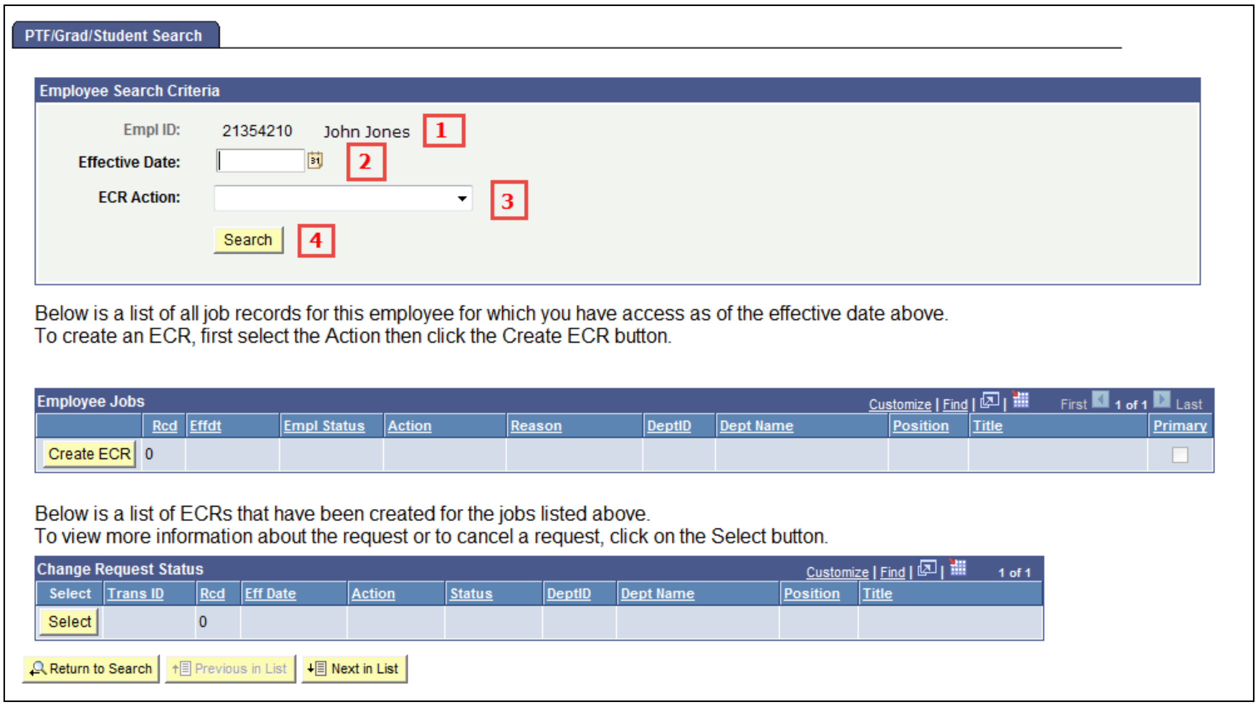
Home > Student/Grad/PTF Changes > Use > Stu/Grad/PTF ECR Create



- Enter the Name or Eagle ID of the employee as well as any available field to narrow search. 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.

Change Criteria Search Page



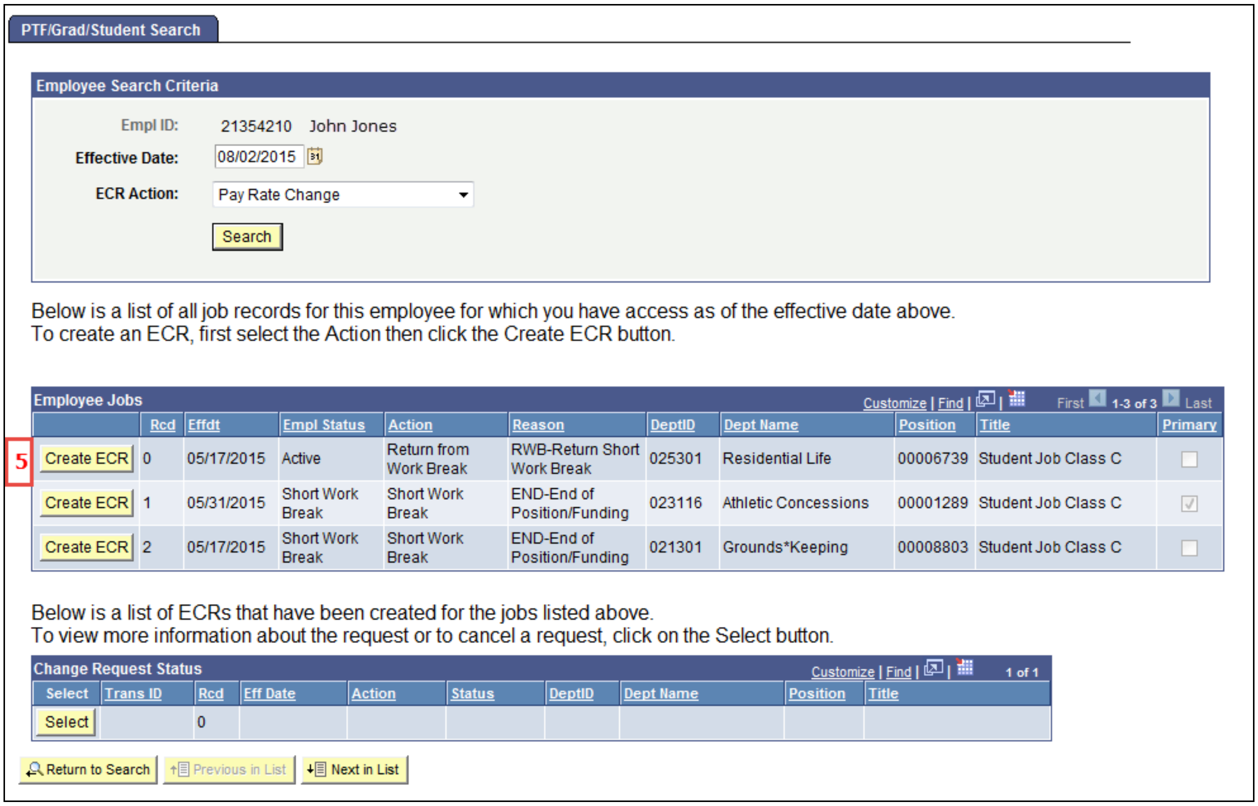
1. Verify the Eagle Id and Name of the employee for whom the transaction is being done.

2. Enter the Effective Date of the Pay Rate Change. This is the Effective Date that will be reflected in PeopleSoft HR. The Effective date must coincide with the correct start of the employee's pay period. (Weekly or Monthly)

3. Select "**Pay Rate Change**" 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.

Change Criteria Search Page

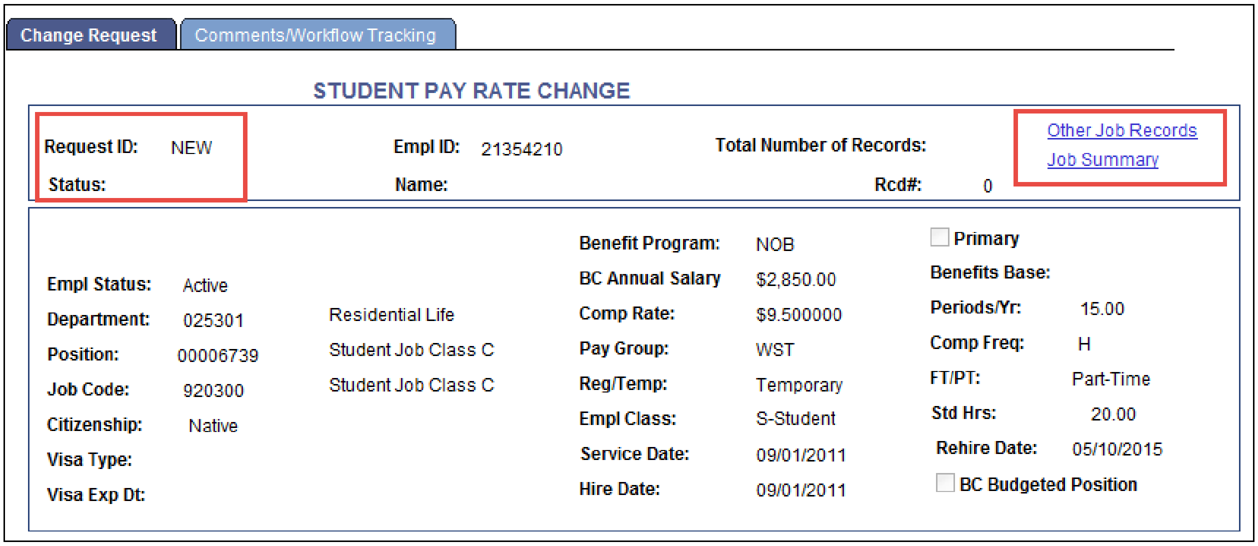


5. Click the Create ECR button next to the job record of the pay rate change.

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

   It is very important to verify the correct job record is selected when processing a change transaction.

Pay Rate Change Request Page



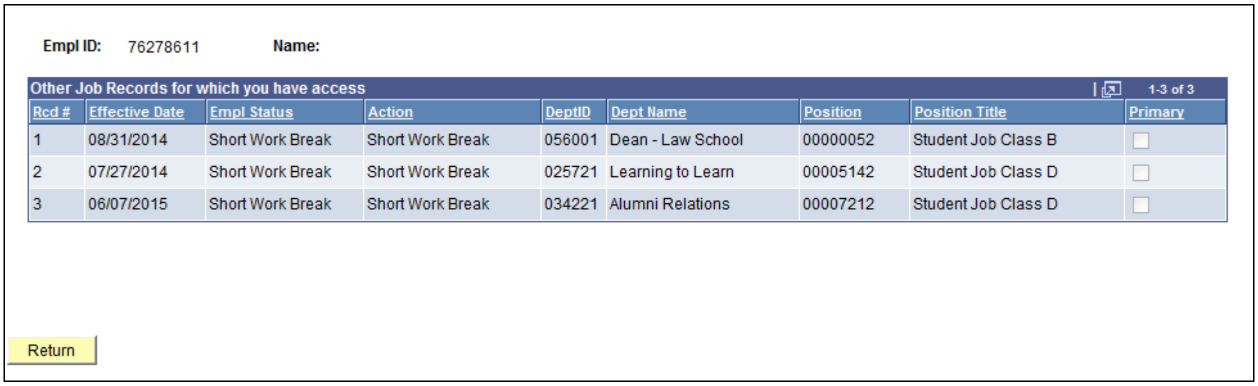
Information specific to the employee and important for processing a Pay Rate Change has been identified and captured in the top section of the screen. This information is reflective of the data specific to the job being updated. This data displays current information as of the effective date entered. 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. Approval areas are: OSP or the HR Foreign Tax Office.
Denied	The status is set to 'Denied' when the request is denied by an approver. Upon denial, the request is closed and a notification is sent back to the originator. At this point, the originator may create a new request.
Completed	The status is 'Completed' when the data is entered successfully into PeopleSoft Job Data. No further activity allowed on this request.

- 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.



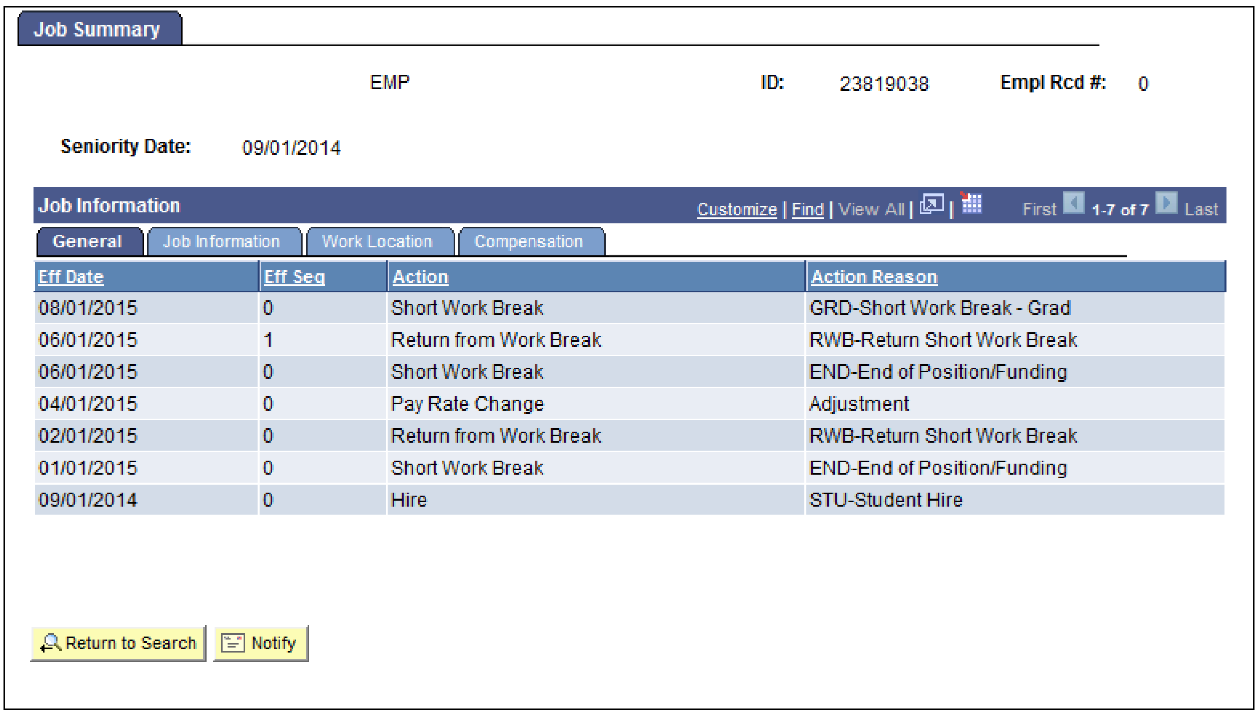
Empl ID: 76278611 Name:

Other Job Records for which you have access 1-3 of 3

Rcd #	Effective Date	Empl Status	Action	DeptID	Dept Name	Position	Position Title	Primary
1	08/31/2014	Short Work Break	Short Work Break	056001	Dean - Law School	00000052	Student Job Class B	
2	07/27/2014	Short Work Break	Short Work Break	025721	Learning to Learn	00005142	Student Job Class D	
3	06/07/2015	Short Work Break	Short Work Break	034221	Alumni Relations	00007212	Student Job Class D	

Return

- The **Job Summary** link opens a screen that displays the employee's specific job activity for the particular job record displayed.



Job Summary

EMP ID: 23819038 Empl Rcd #: 0

Seniority Date: 09/01/2014

Job Information Customize | Find | View All | First 1-7 of 7 Last

General | Job Information | Work Location | Compensation

Eff Date	Eff Seq	Action	Action Reason
08/01/2015	0	Short Work Break	GRD-Short Work Break - Grad
06/01/2015	1	Return from Work Break	RWB-Return Short Work Break
06/01/2015	0	Short Work Break	END-End of Position/Funding
04/01/2015	0	Pay Rate Change	Adjustment
02/01/2015	0	Return from Work Break	RWB-Return Short Work Break
01/01/2015	0	Short Work Break	END-End of Position/Funding
09/01/2014	0	Hire	STU-Student Hire

Return to Search | Notify

Pay Rate Change Request Page (Lower Section)

Change Request | Comments/Workflow Tracking

STUDENT PAY RATE CHANGE

Request ID: NEW
Empl ID:
Total Number of Records:
Other Job Records
Job Summary
Status:
Name:
Rcd#: 1

Empl Status: Active
Department: 050201 Student Services
Position: 00000431 Student Job Class D
Job Code: 920400 Student Job Class D
Citizenship: Not Indic.
Visa Type:
Visa Exp Dt:

Benefit Program:
BC Annual Salary $4,830.00
Comp Rate: $11.500000
Pay Group: WST
Reg/Temp: Temporary
Empl Class: S-Student
Service Date: 11/20/2014
Hire Date: 11/20/2014

Primary
Benefits Base:
Periods/Yr: 12.00
Comp Freq: H
FT/PT: Part-Time
Std Hrs: 35.00
Rehire Date: 11/20/2014
BC Budgeted Position

Transaction Type: Pay Rate Change Only 6

Funding Accounts: Find | View All First 1 of 1 Last

Start Date: 05/17/2015 Stop Date: 08/29/2015 7

Account Codes Find | View All First 1 of 1 Last

Account Code: 50201-100-05417-53311D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
050201	100	05417	00000		00000	000	53311	STO	100.000	D001

FICA Status-Employee Subject

Pay / Hours / Job Change Find First 1 of 1 Last

Effective Date: 08/02/2015 8

9 New Hourly Comp Rate | Change Percent

Annual Salary Change Amount 0.00
Hourly Change Amt

Comment:
10

Return to Search
Submit 11

6. Select the Transaction Type from the Drop down menu. The two options available are:
   - **Pay Rate Change Only –** select if the user is processing a pay rate change only.
   - **Pay Rate/Distribution Change –** select if the user needs to process a distribution change along with the Pay Rate change.

The Transaction Type will align the page with the required fields based on what is selected in this step. **This is a required field.**

7. Verify the Stop Date information before you move forward with the transaction. This is important when processing a pay rate change to confirm when funding and position will end.

8. Confirm the Effective Date is correct because this is the effective date of the pay rate change in payroll. This field will be grayed out. If the date is incorrect, the user must select the Return to Search link at the bottom of the page and begin again.

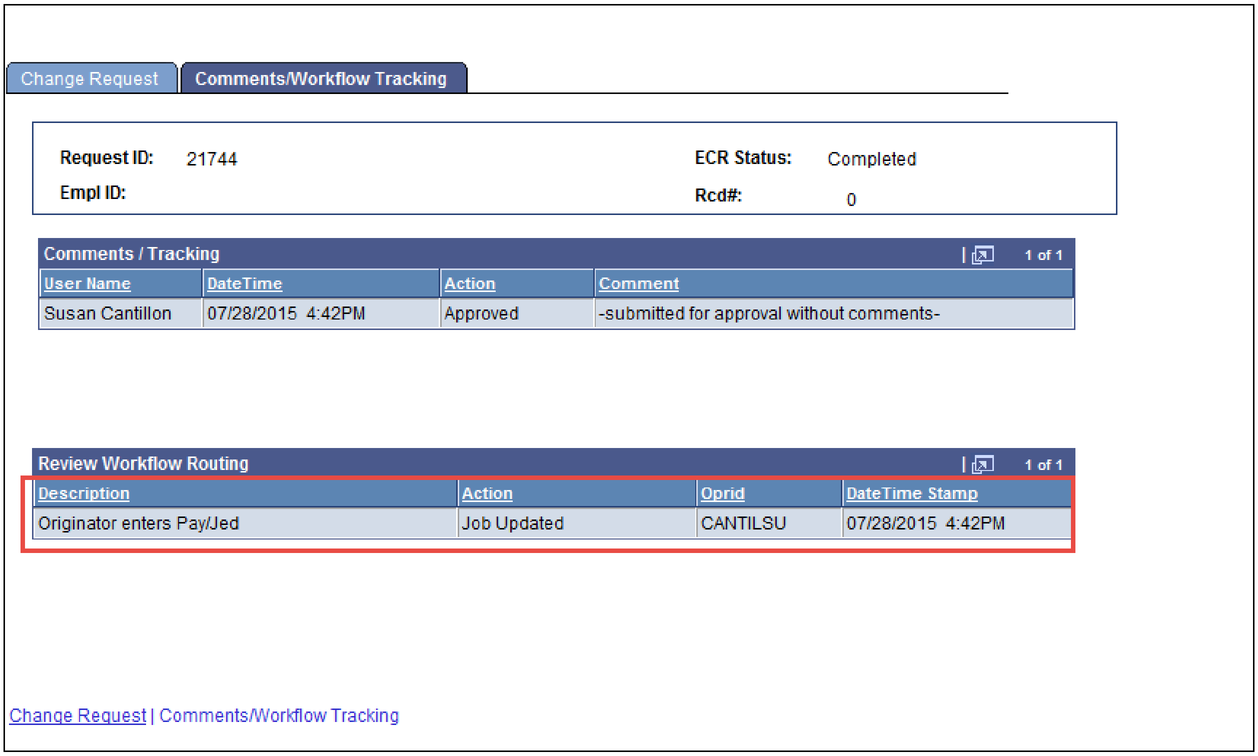
9. Enter the new pay rate into one of the fields within the selected box. Only one field needs to be entered and the other field will be automatically calculated by the system. In general, it is best to update the “New Hourly Comp Rate’ field for hourly paid employees or the “New Monthly Comp Rate” field for monthly paid employees. Enter into the percentage field if the change is a specific percent.

> **NOTE:** The Comp Rate will display whether the field is monthly, weekly or hourly based on the Pay Frequency. **Example:** New Hourly Comp Rate.
>
> Verify the Annual Salary Change Amount and the Change Amount fields calculate correctly. They will be reflective of what is entered into the rate fields in step 9.

10. Originators and Approvers (OSP, Foreign Tax Office) 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.

Pay Rate Change Comments/Workflow Tracking Page


Change Request | Comments/Workflow Tracking

Request ID: 21744 ECR Status: Completed

Empl ID: Rcd#: 0

Comments / Tracking 1 of 1

User Name	DateTime	Action	Comment
Susan Cantillon	07/28/2015 4:42PM	Approved	-submitted for approval without comments-

Review Workflow Routing 1 of 1

Description	Action	Oprid	DateTime Stamp
Originator enters Pay/Jed	Job Updated	CANTILSU	07/28/2015 4:42PM

Change Request | Comments/Workflow Tracking

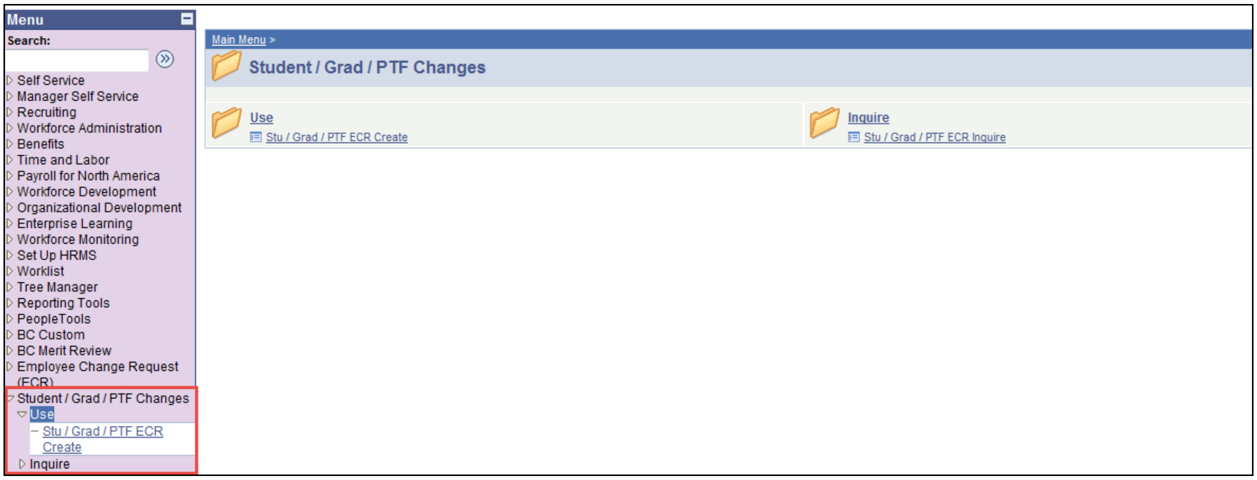
- After the pay rate change is submitted, the workflow path is displayed on the second tab called ‘Comments/Workflow Tracking’. This will show if the transaction is updated in PeopleSoft Job Data automatically or if it needs an approval before being processed.

NOTE:

There are two special workflow approval steps that have been built into the new Change Process when specific criteria is met.

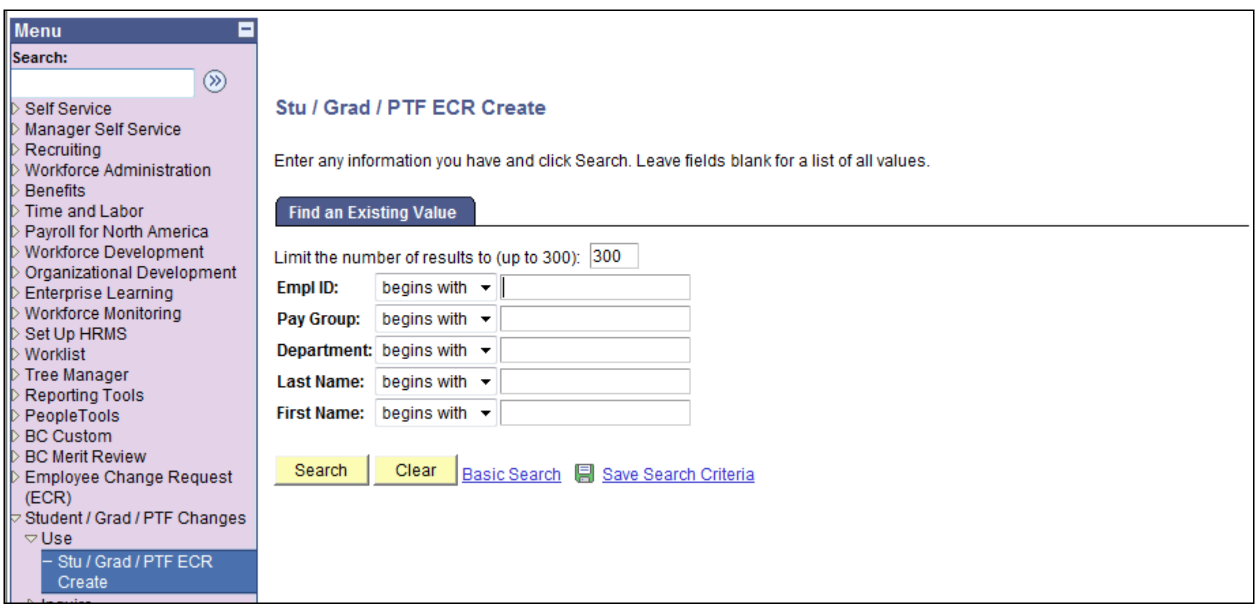
- When the employee is a Foreign employee, the transaction must be approved by the Foreign Tax group in the HRSC.
- If the funding is fund 500x, the workflow will be directed to OSP for approval.

Processing a Job Earning Distribution/Extension Search Page



To process a Job Earning Distribution/Extension using the automated Change process, follow the menu navigation below:

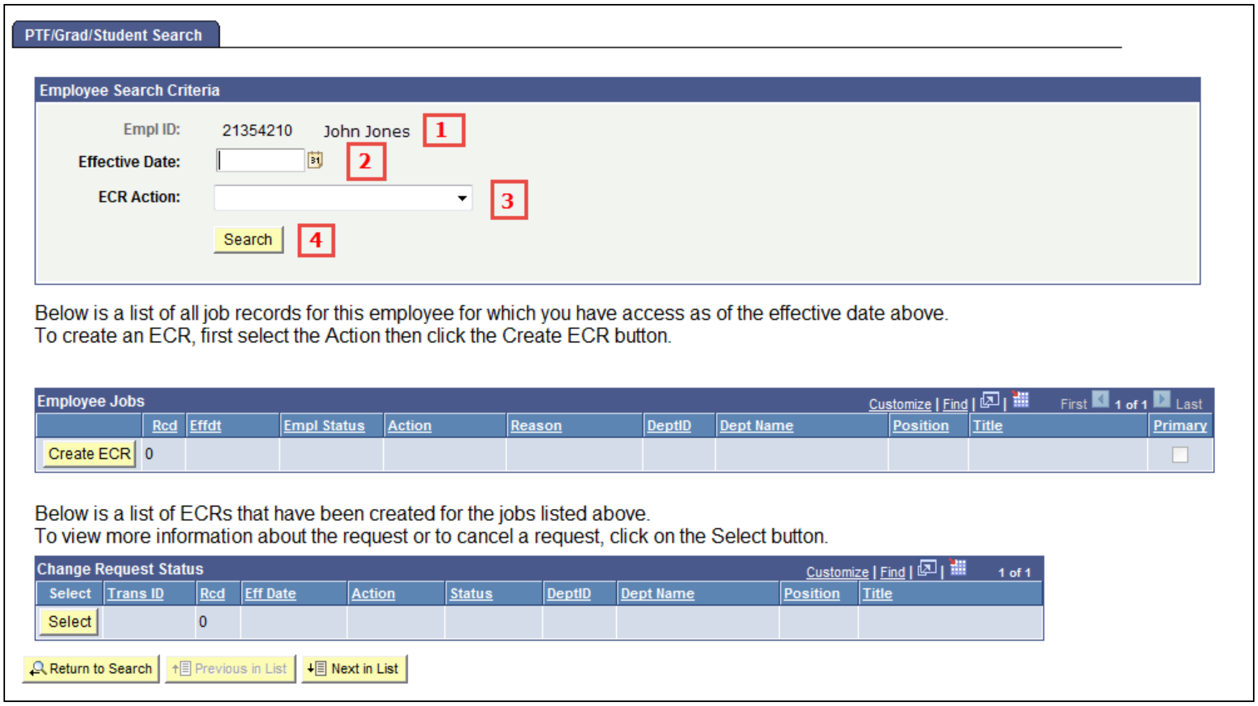
Home > Student/Grad/PTF Changes > Use > Stu/Grad/PTF ECR Create



- Enter the Name or Eagle ID of the employee as well as any available field to narrow search. 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.

Change Search Page



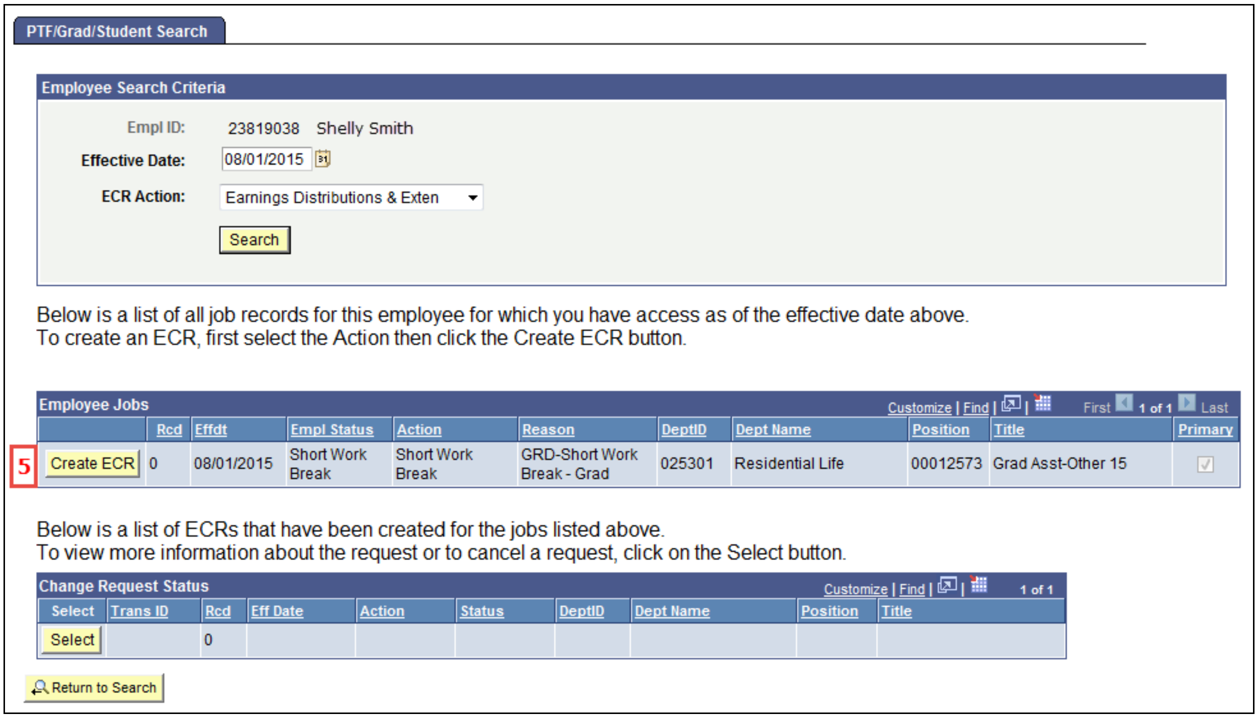
1. Verify the Eagle Id and Name of the employee for whom the transaction is being done.

2. Enter the Effective Date of the Job Earning Distribution Change. This is the Effective Date that will be reflected in PeopleSoft HR. The Effective date must coincide with the correct start of the employee's pay period. (Weekly or Monthly)

3. Select "Earnings Distributions & Extension" 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.

Change Criteria Search Page

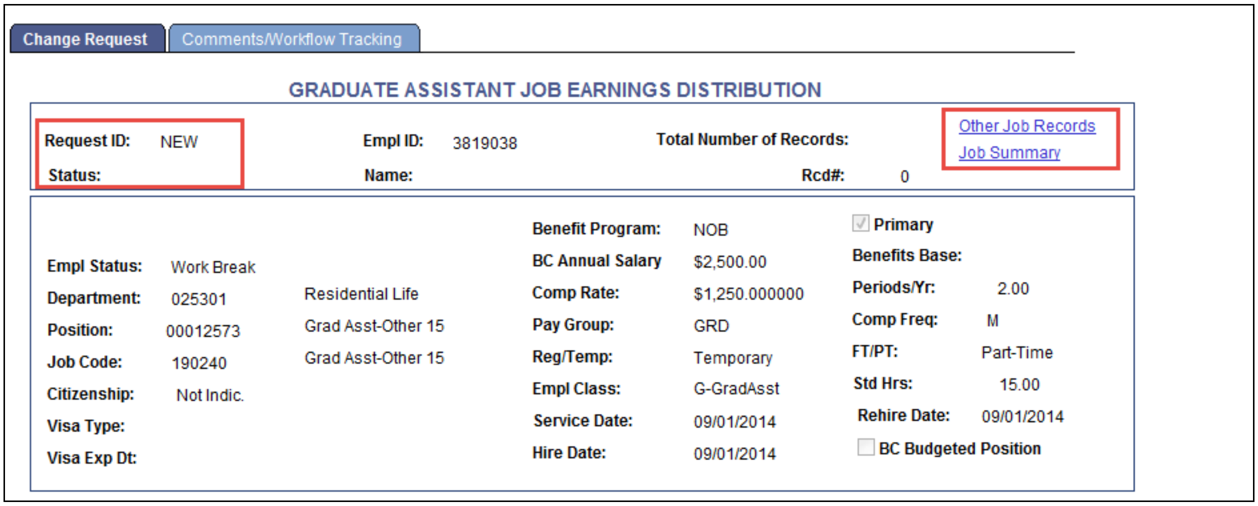


5. Click the Create ECR button next to the job record of the job earning distribution change.

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

It is very important to verify the correct job record is selected when processing a change transaction.

Processing a Job Earning Distribution/Extension



Information specific to the employee and important for processing a Job Earning Distribution/Extension 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. Approval areas are: OSP or the HR Foreign Tax Office.
Denied	The status is set to 'Denied' when the request is denied by an approver. Upon denial, the request is closed and a notification is sent back to the originator. At this point, the originator may create a new request.
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.

Empl ID: 23819038 **Name:**

Other Job Records for which you have access — 1 of 1

Rcd #	Effective Date	Empl Status	Action	DeptID	Dept Name	Position	Position Title	Primary
0								

- The **Job Summary** link opens a screen that displays the employee's specific job activity for the particular job record displayed.

Job Summary

EMP **ID:** 23819038 **Empl Rcd #:** 0

Seniority Date: 09/01/2014

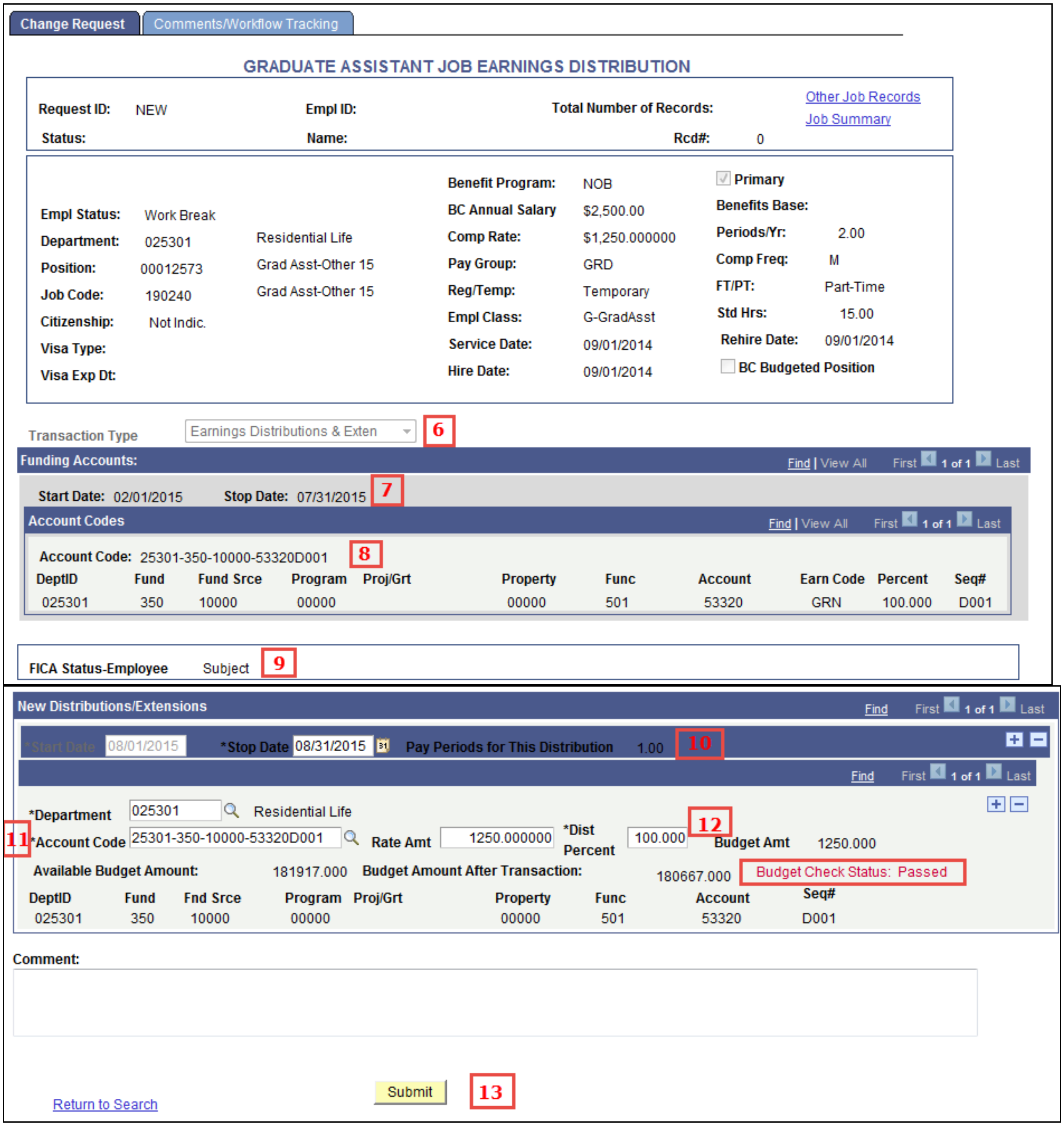
Job Information Customize | Find | View All | First 1-7 of 7 Last

General | Job Information | Work Location | Compensation

Eff Date	Eff Seq	Action	Action Reason
08/01/2015	0	Short Work Break	GRD-Short Work Break - Grad
06/01/2015	1	Return from Work Break	RWB-Return Short Work Break
06/01/2015	0	Short Work Break	END-End of Position/Funding
04/01/2015	0	Pay Rate Change	Adjustment
02/01/2015	0	Return from Work Break	RWB-Return Short Work Break
01/01/2015	0	Short Work Break	END-End of Position/Funding
09/01/2014	0	Hire	STU-Student Hire

Return to Search | Notify

Processing a Job Earning Distribution/Extension (Lower Section)



6. The Transaction Type is defaulted in and grayed out as Earnings Distributions & Exten.

   The Transaction Type sets the page with the required fields based on what the transaction is. **This is a required field.**

7. Verify the Funding Date information before you move forward with the transaction. This is very important when processing a distribution change.

8. Verify the Funding information before you move forward with the transaction. This is also very important when processing a distribution change.

9. Verify the FICA Status of the employee. This is very important if the employee is a foreign employee.

10. Confirm the Start Date matches the Effective Date of the Job Earning Distribution. This field will be grayed out. If the date is incorrect, the user must select the Return to Search link at the bottom of the page and begin again.

- Enter the Stop Date of the distribution. The Pay Periods for this distribution will calculate based on the Stop Date.

11. Enter or look up the Account code for the new Earning Distribution. The Account Code table is limited by the security access of the user. The user will only see those account codes within their departmental access.

12. Enter the new rate into one of the fields within the selected box. Only one field needs to be entered and the other two will be automatically calculated by the system. If the percentage is entered, the rate amount will calculate automatically.

NOTE:

- When doing multiple split distributions, the distribution percent must total 100 percent.
- The budget amount will only calculate if there is a Stop Date entered because it calculates against the number of pay periods within the given dates.
- If more than one distribution account needs to be entered for the specific dates, use the plus sign ( ) to insert a second row and repeat steps 10-12 to enter the account information.

****** The originator and approvers (OSP, Foreign Tax Office) 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.

13. Enter the Submit Button when all the required information has been entered. This will assign a Request ID to the transaction.

Job Earning Distribution/Extension Comments/Workflow Tracking Page

Change Request | Comments/Workflow Tracking

Request ID: 21747 **ECR Status:** Completed

Empl ID: **Rcd#:** 0

Comments / Tracking 1 of 1

User Name	DateTime	Action	Comment
Susan Cantillon	08/11/2015 1:13PM	Approved	-submitted for approval without comments-

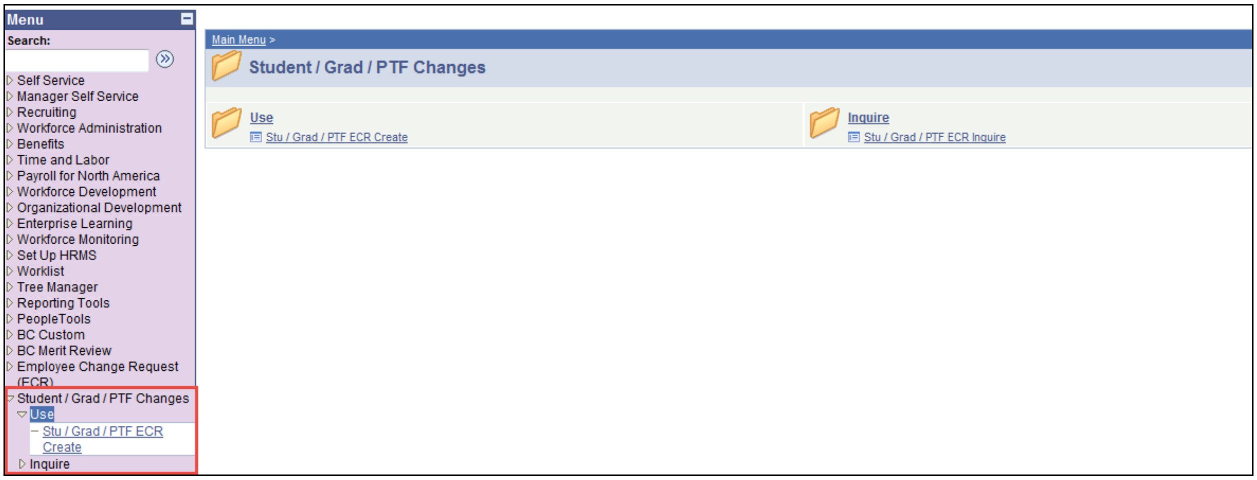
Review Workflow Routing 1 of 1

Description	Action	Oprid	DateTime Stamp
Originator enters Pay/Jed	Job Updated	CANTILSU	08/11/2015 1:13PM

- After the job earning distribution is submitted, the workflow approval path is displayed on the second tab called ‘Comments/Workflow Tracking’. This will show where the transaction is within the process.

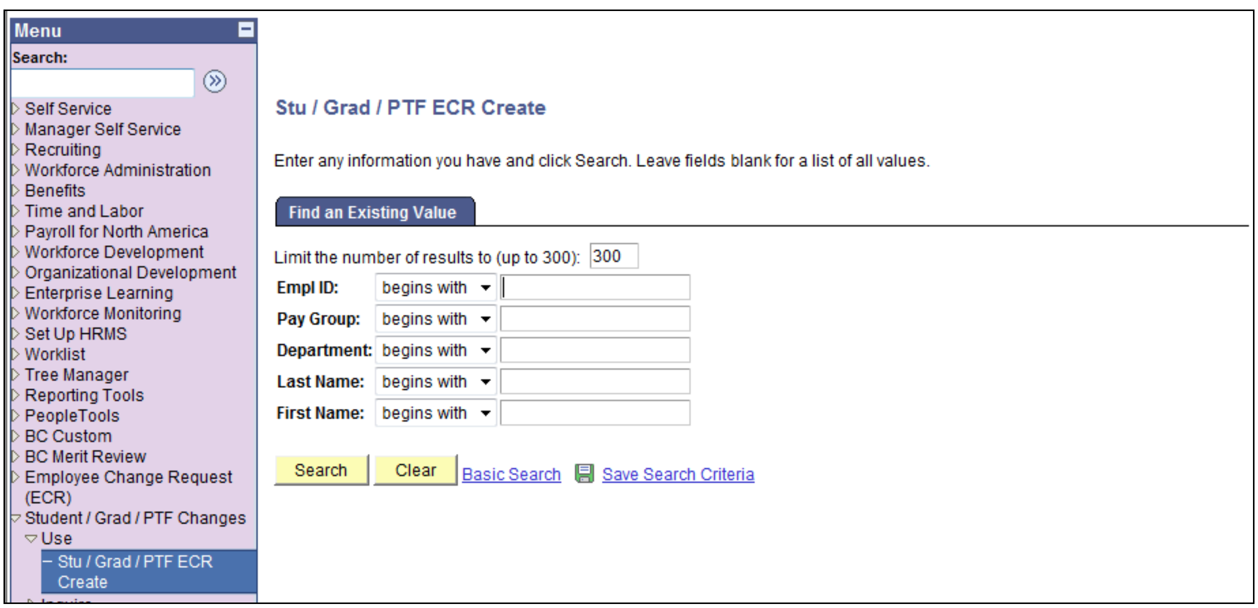
- The request can be viewed by the originator and the approver(s) at any point during the workflow process for a status update.

Processing a Pay Rate/Job Earning Distribution Change Search Page



To process a Job Earning Distribution/Extension using the automated Change process, follow the menu navigation below:

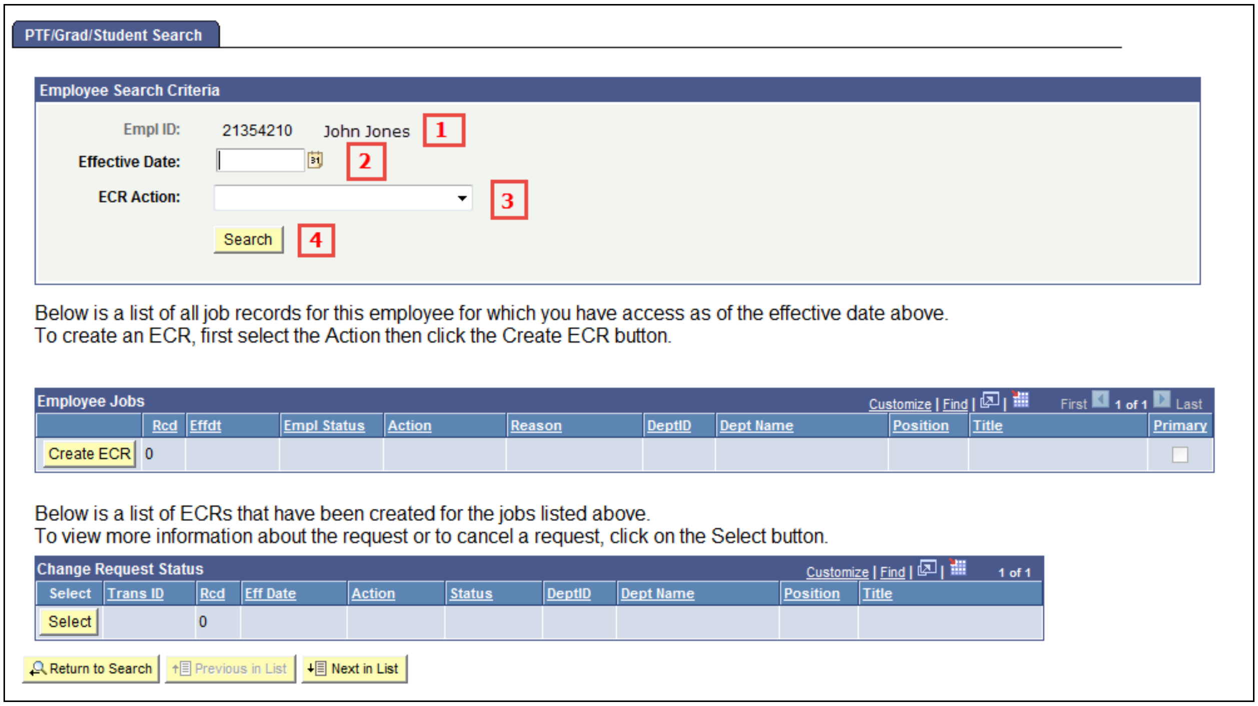
Home > Student/Grad/PTF Changes > Use > Stu/Grad/PTF ECR Create



- Enter the Name or Eagle ID of the employee as well as any available field to narrow search. 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.

Change Search Page



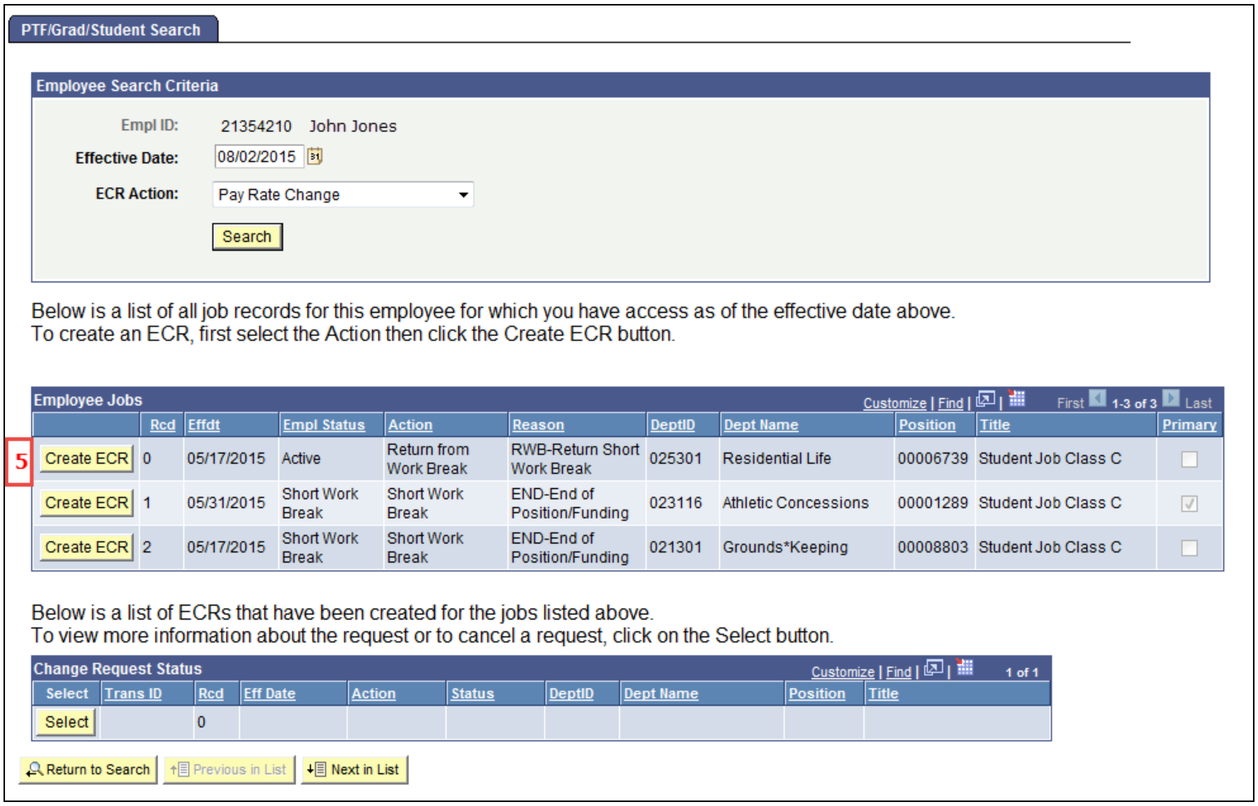
1. Verify the Eagle Id and Name of the employee for whom the transaction is being done.

2. Enter the Effective Date of the Pay Rate Change. This is the Effective Date that will be reflected in PeopleSoft HR. The Effective date must coincide with the correct start of the employee's pay period. (Weekly or Monthly)

3. Select "**Pay Rate Change**" 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.

Change Criteria Search Page



PTF/Grad/Student Search

Employee Search Criteria

Empl ID: 21354210 John Jones

Effective Date: 08/02/2015

ECR Action: Pay Rate Change

Search

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	Effdt	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
5 Create ECR	0	05/17/2015	Active	Return from Work Break	RWB-Return Short Work Break	025301	Residential Life	00006739	Student Job Class C	
Create ECR	1	05/31/2015	Short Work Break	Short Work Break	END-End of Position/Funding	023116	Athletic Concessions	00001289	Student Job Class C	✓
Create ECR	2	05/17/2015	Short Work Break	Short Work Break	END-End of Position/Funding	021301	Grounds*Keeping	00008803	Student Job Class C	

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 — Customize | Find | 1 of 1

Select	Trans ID	Rcd	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
Select		0							

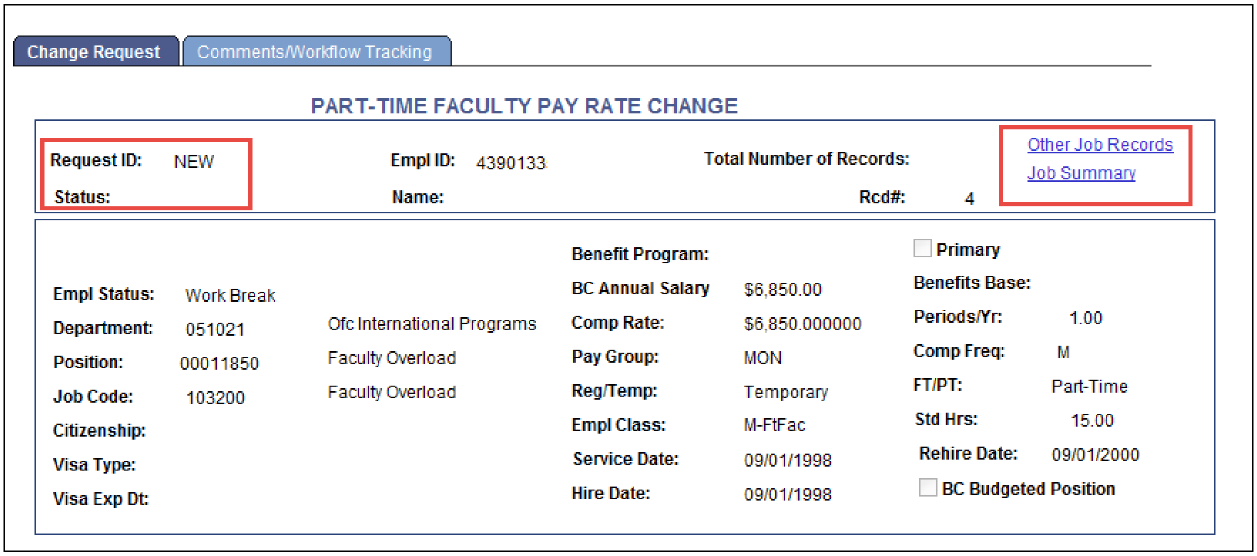
Return to Search | Previous in List | Next in List

5. Click the Create ECR button next to the job record of the pay rate change.

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

   It is very important to verify the correct job record is selected when processing a change transaction.

ECR Pay Rate/Job Earning Distribution Change Request Page



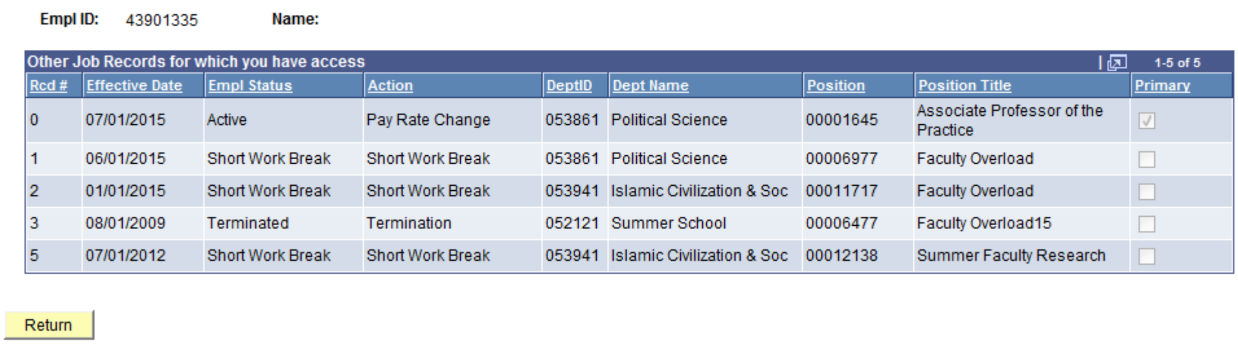
Information specific to the employee and important for processing a Pay Rate/Job Earning Distribution change has been identified and captured in the top section of the screen. This information is reflective of the data specific to the job being updated. This data displays current information as of the 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. Approval areas are: OSP or the HR Foreign Tax Office.
Denied	The status is set to 'Denied' when the request is denied by an approver. Upon denial, the request is closed and a notification is sent back to the originator. At this point, the originator may create a new request.
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.



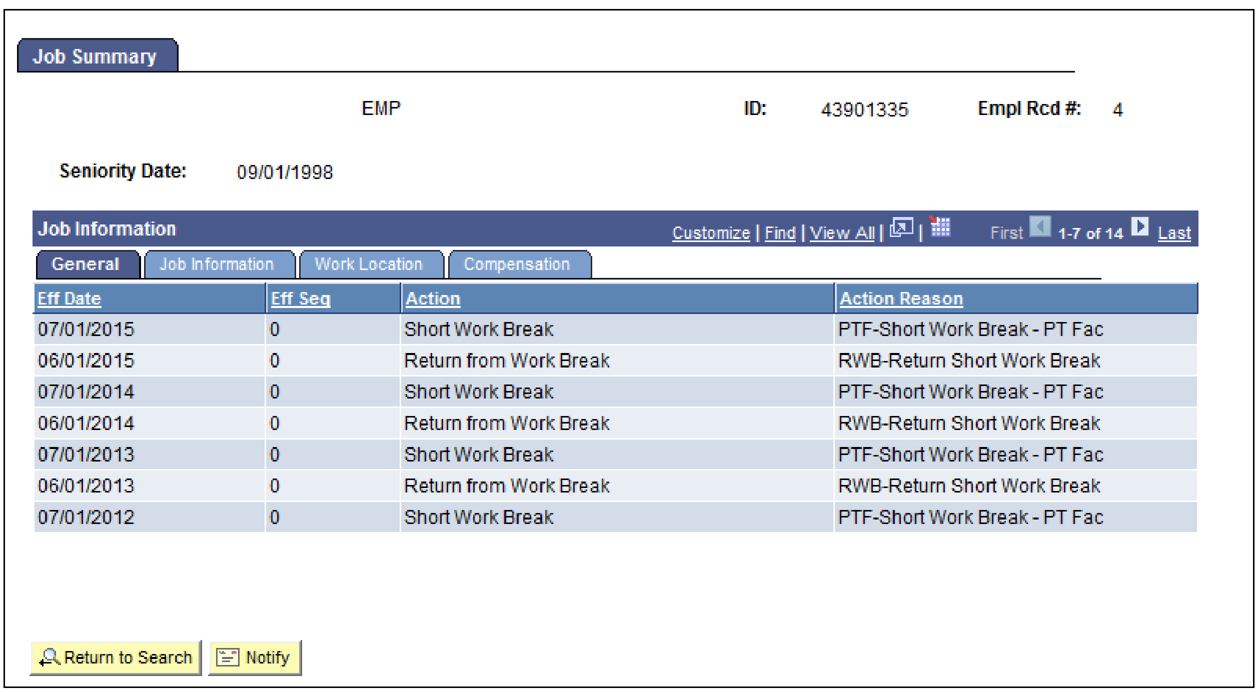
Empl ID: 43901335 **Name:**

Other Job Records for which you have access — 1-5 of 5

Rcd #	Effective Date	Empl Status	Action	DeptID	Dept Name	Position	Position Title	Primary
0	07/01/2015	Active	Pay Rate Change	053861	Political Science	00001645	Associate Professor of the Practice	☑
1	06/01/2015	Short Work Break	Short Work Break	053861	Political Science	00006977	Faculty Overload	☐
2	01/01/2015	Short Work Break	Short Work Break	053941	Islamic Civilization & Soc	00011717	Faculty Overload	☐
3	08/01/2009	Terminated	Termination	052121	Summer School	00006477	Faculty Overload15	☐
5	07/01/2012	Short Work Break	Short Work Break	053941	Islamic Civilization & Soc	00012138	Summer Faculty Research	☐

Return

- The **Job Summary** link opens a screen that displays the employee's specific job activity for the particular job record displayed.



Job Summary

EMP **ID:** 43901335 **Empl Rcd #:** 4

Seniority Date: 09/01/1998

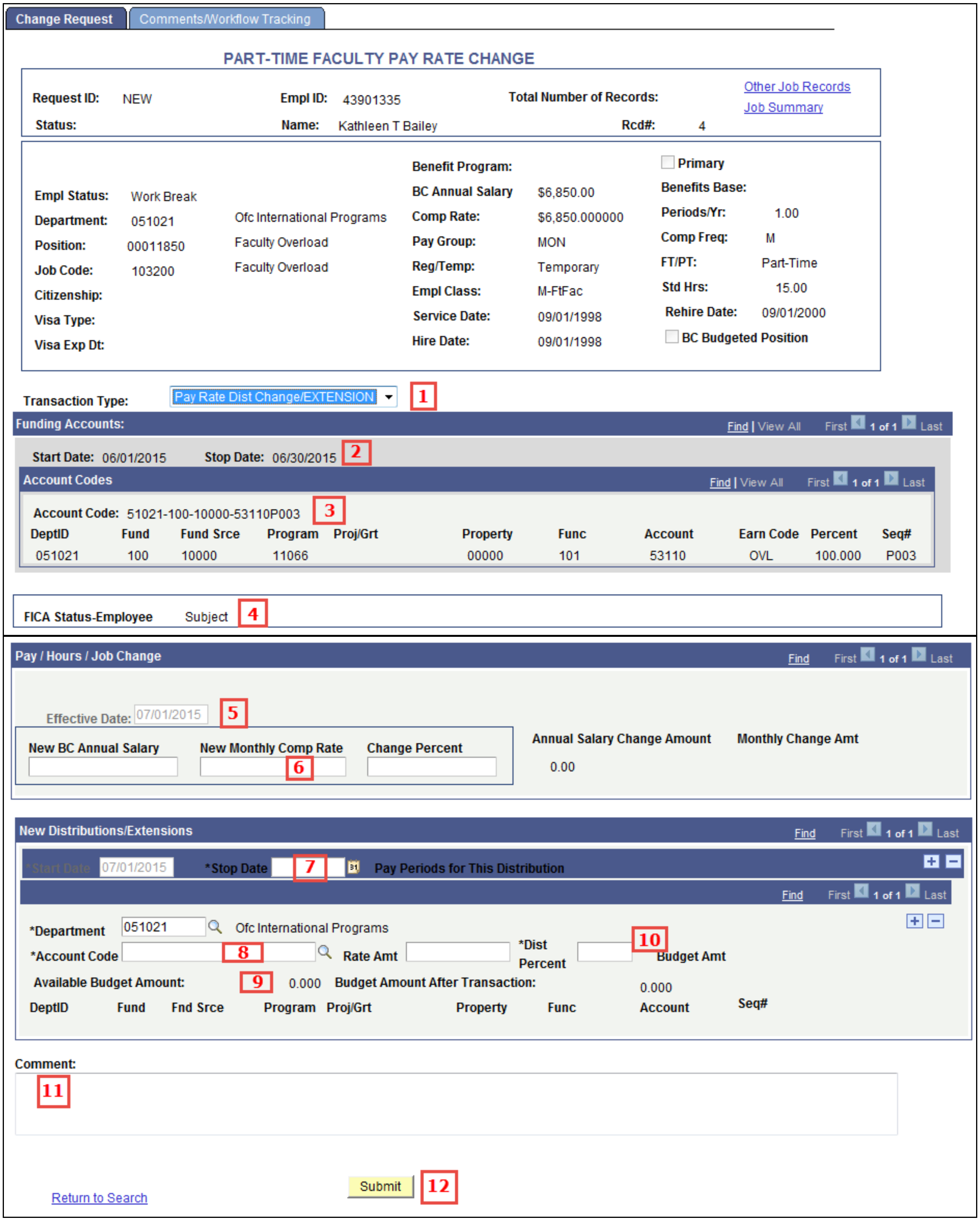
Job Information Customize | Find | View All | First 1-7 of 14 Last

General | Job Information | Work Location | Compensation

Eff Date	Eff Seq	Action	Action Reason
07/01/2015	0	Short Work Break	PTF-Short Work Break - PT Fac
06/01/2015	0	Return from Work Break	RWB-Return Short Work Break
07/01/2014	0	Short Work Break	PTF-Short Work Break - PT Fac
06/01/2014	0	Return from Work Break	RWB-Return Short Work Break
07/01/2013	0	Short Work Break	PTF-Short Work Break - PT Fac
06/01/2013	0	Return from Work Break	RWB-Return Short Work Break
07/01/2012	0	Short Work Break	PTF-Short Work Break - PT Fac

Return to Search | Notify

Pay Rate/Job Earning Distribution Change Request Page (Lower Section)



1. Select the Transaction Type from the Drop down menu. The two options available are:
   - **Pay Rate Change Only –** select if the user is processing a pay rate change only.
   - **Pay Rate/Distribution Change –** select if the user needs to process a distribution change along with the Pay Rate change.

   The Transaction Type will align the page with the required fields based on what is selected in this step. **This is a required field.**

2. Verify the Funding Date information before you move forward with the transaction. This is very important when processing a distribution change with the pay rate change.

3. Verify the Funding information before you move forward with the transaction. This is also very important when processing a distribution change with the pay rate change.

4. Verify the FICA Status of the employee. This is very important when processing a pay rate change. In particular, if the employee is a foreign employee.

5. Confirm the Effective Date is correct because this is the effective date of the pay rate change in payroll. This field will be grayed out. If the date is incorrect, the user must select the Return to Search link at the bottom of the page and begin again.

6. Enter the new pay rate into one of the fields within the selected box. Only one field needs to be entered and the other field will be automatically calculated by the system. In general, it is best to update the "New Hourly Comp Rate' field for hourly paid employees or the "New Monthly Comp Rate" field for monthly paid employees. Enter into the percentage field if the change is a specific percent.

   > **<u>NOTE</u>:** The Comp Rate will display whether the field is monthly, weekly or hourly based on the Pay Frequency. **Example:** <u>New Monthly Comp Rate</u>.

   - The budget checking will automatically occur and look at the Annual Salary Change Amount to check for.
   - The Pay Rate Action Reason code that will default on the Job Record is 'Adjustment'.

7. Confirm the Start Date matches the Effective Date of the Job Earning Distribution. This field will be grayed out. If the date is incorrect, the user must select the Return to Search link at the bottom of the page and begin again.
Enter the Stop Date. Verify that the Pay Periods have calculated correctly based on the dates entered. This calculation is done automatically.

8. Enter or look up the Account code for the new Earning Distribution. The Account Code table is limited by the security access of the user. The user will only see those account codes within their departmental access.

9. Budget Checking will automatically occur when an account code is entered to verify there is enough funding for the salary.

10. Enter either the new rate or distribution percent into one of the fields within the selected box. Only one field needs to be entered and the other will be automatically calculated by the system. If the percentage is entered, the rate amount will calculate automatically.

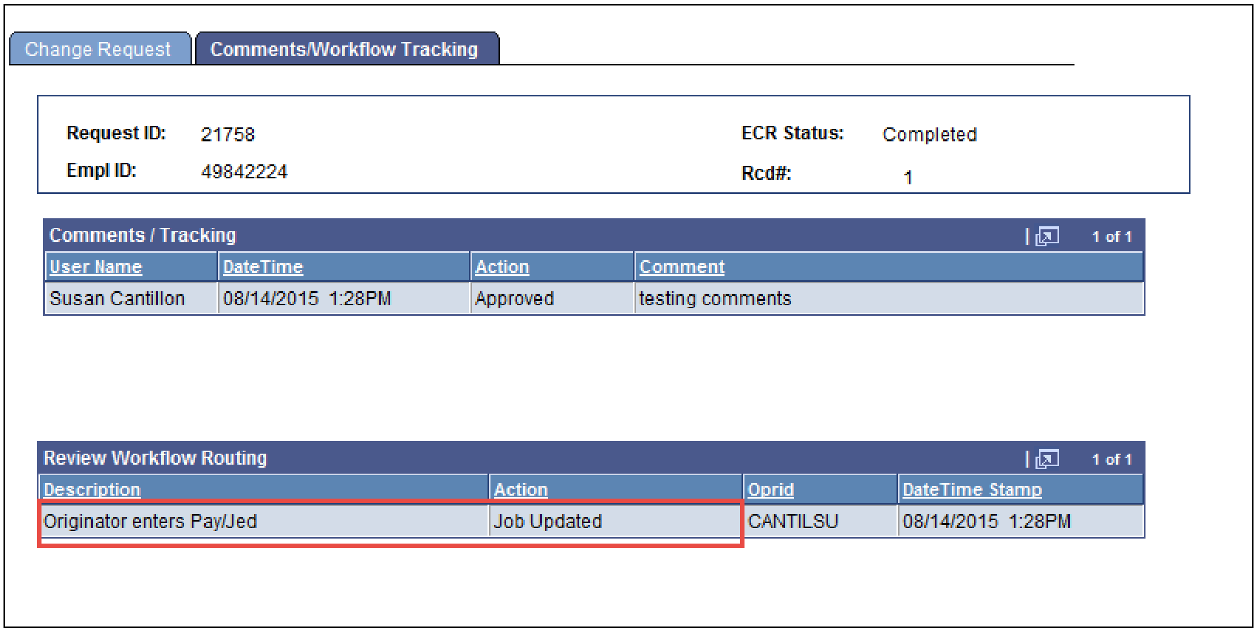
NOTE:

- When doing multiple split distributions, the distribution percent must total 100 percent.
- The budget amount will only calculate if there is a Stop Date entered because it calculates against the number of pay periods within the given dates.
- If more than one distribution account needs to be entered for the specific dates, use the plus sign ( ) to insert a second row and repeat steps 8-10 to enter the account information.

11. Originators and Approvers (OSP, Foreign Tax Office) 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 at any time. They can also be referenced at any time after the transaction has been completed.

12. 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.

Pay Rate/Job Earning Distribution Change Comments/Workflow Tracking Page



Change Request | Comments/Workflow Tracking

Request ID: 21758   ECR Status: Completed
Empl ID: 49842224   Rcd#: 1

Comments / Tracking   1 of 1

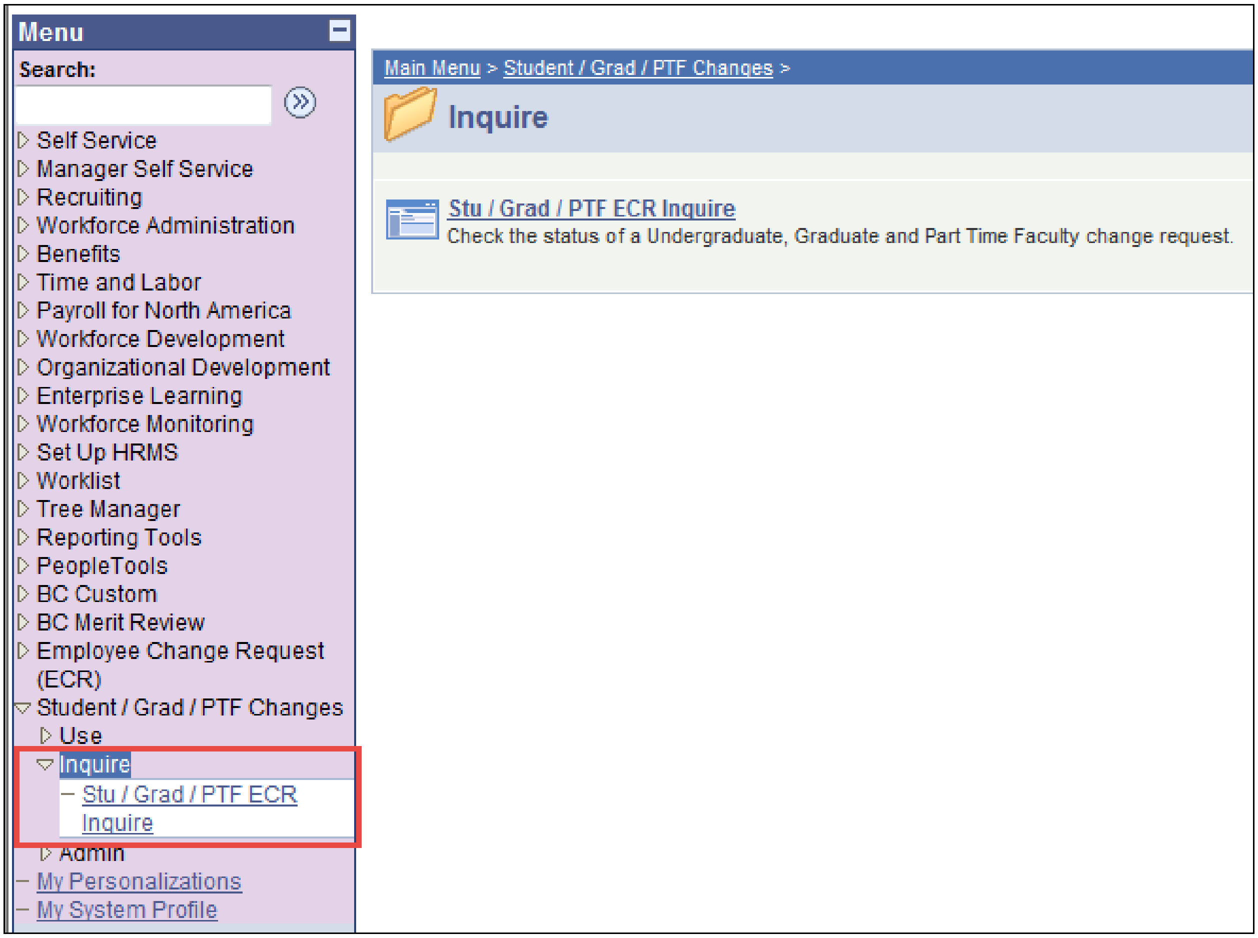
User Name	DateTime	Action	Comment
Susan Cantillon	08/14/2015 1:28PM	Approved	testing comments

Review Workflow Routing   1 of 1

Description	Action	Oprid	DateTime Stamp
Originator enters Pay/Jed	Job Updated	CANTILSU	08/14/2015 1:28PM

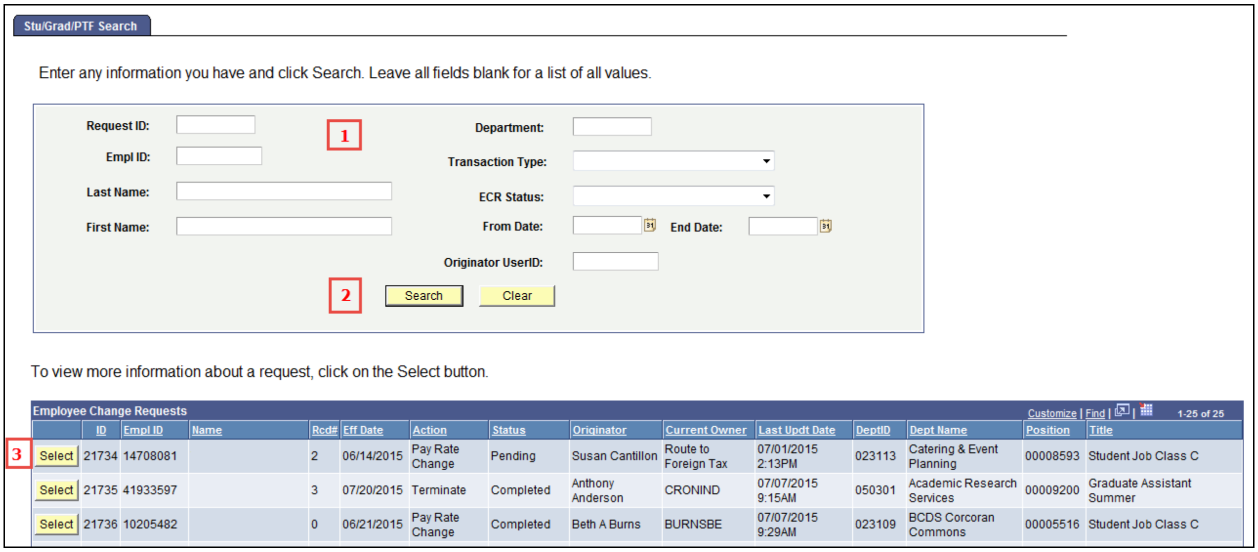
- After the transaction is submitted, the workflow path is displayed on the second tab called 'Comments/Workflow Tracking'. This will show if an approver is needed before it is updated into Job Data.
- The request can be viewed by the originator and the approvers at any point during the workflow process for a status update.

Change Transaction Inquiry



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

Home > Student/Grad/PTF Changes > Inquire > Stu/Grad/PTF ECR Inquire



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 for all those viewing, except for the current approver of the transaction.

4. The ‘Other Job Records’ link is active for viewing if needed. It will only show records that are within the security access of the user.

5. The information is grayed out after it has been submitted. It is for viewing only.

6. The originator can cancel the transaction from the Inquiry page if it has not yet been uploaded into PeopleSoft HR by the HRSC.