

PeopleSoft HR

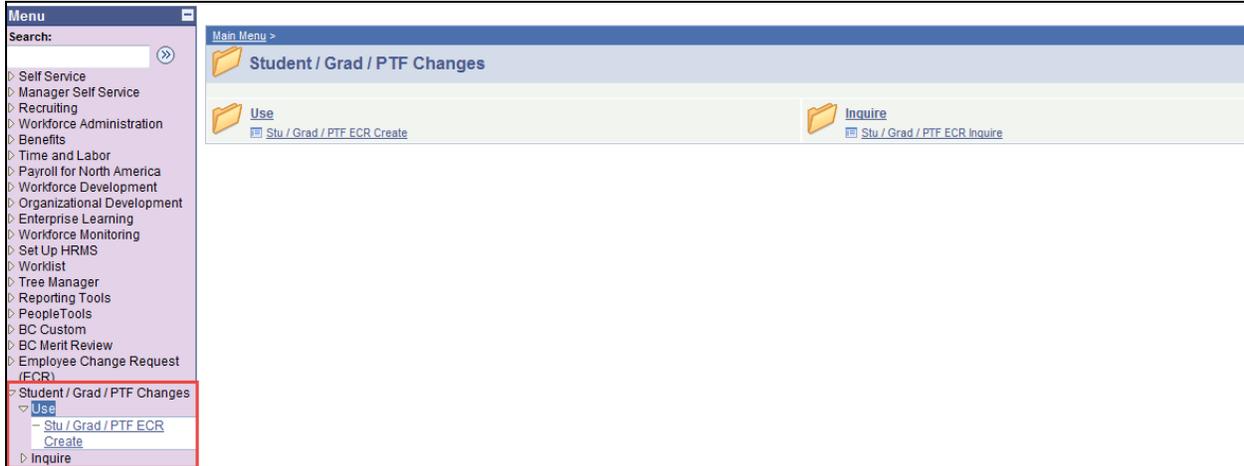
PTF/Grad/Hourly Student Automated
Change Process

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

PTF/Grad/Student Search

Employee Search Criteria

Empl ID: 21354210 John Jones 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	Effdt	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
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	Trans ID	Rcd	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
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 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

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	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	<input type="checkbox"/>
	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	<input checked="" type="checkbox"/>
	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	<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	Trans ID	Rcd	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
Select		0							

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

Change Request		Comments/Workflow Tracking	
STUDENT PAY RATE CHANGE			
Request ID: NEW	Empl ID: 21354210	Total Number of Records:	Other Job Records
Status:	Name:	Rcd#: 0	Job Summary
Empl Status: Active	Department: 025301 Residential Life	Benefit Program: NOB <input type="checkbox"/> Primary	BC Annual Salary: \$2,850.00
Position: 00006739 Student Job Class C	Job Code: 920300 Student Job Class C	Comp Rate: \$9,500000	Benefits Base:
Citizenship: Native	Comp Freq: H	Pay Group: WST	Periods/Yr: 15.00
Visa Type:	Reg/Temp: Temporary	FT/PT: Part-Time	Comp Freq: H
Visa Exp Dt:	Empl Class: S-Student	Std Hrs: 20.00	Rehire Date: 05/10/2015
	Service Date: 09/01/2011	<input type="checkbox"/> BC Budgeted Position	
	Hire Date: 09/01/2011		

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	<input type="checkbox"/>
2	07/27/2014	Short Work Break	Short Work Break	025721	Learning to Learn	00005142	Student Job Class D	<input type="checkbox"/>
3	06/07/2015	Short Work Break	Short Work Break	034221	Alumni Relations	00007212	Student Job Class D	<input type="checkbox"/>

[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
Status:	Name:	Rcd#: 1	Job Summary

Empl Status: Active	Benefit Program:	<input type="checkbox"/> Primary
Department: 050201 Student Services	BC Annual Salary: \$4,830.00	Benefits Base:
Position: 00000431 Student Job Class D	Comp Rate: \$11.500000	Periods/Yr: 12.00
Job Code: 920400 Student Job Class D	Pay Group: WST	Comp Freq: H
Citizenship: Not Indic.	Reg/Temp: Temporary	FT/PT: Part-Time
Visa Type:	Empl Class: S-Student	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 11/20/2014	Rehire Date: 11/20/2014
	Hire Date: 11/20/2014	<input type="checkbox"/> 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	Hourly Change Amt
	<input type="text"/>	<input type="text"/>	0.00	

Comment:

10
Submit
11

[Return to Search](#)

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](#)

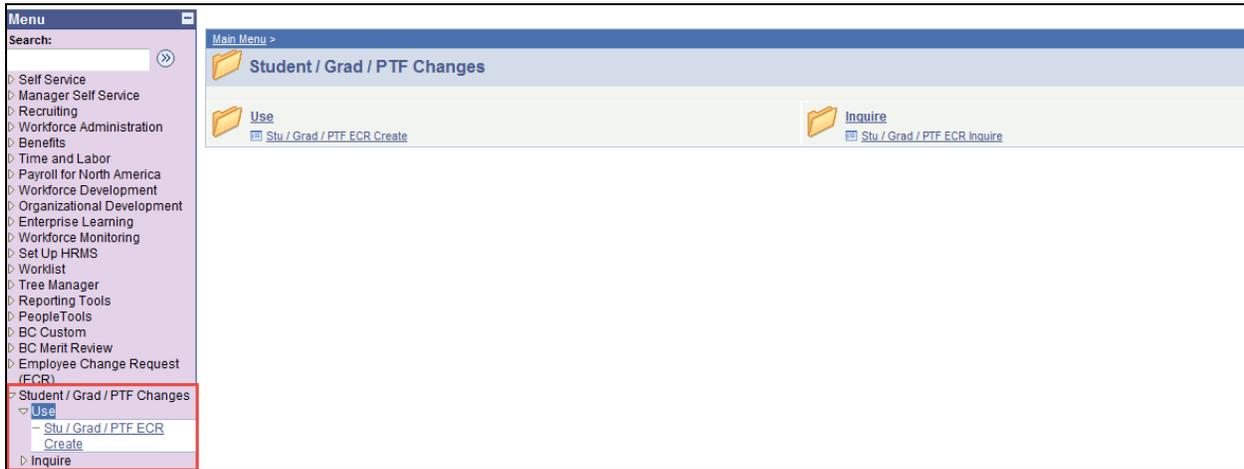
- After the pay rate change is submitted, the workflow path is displayed on the second tab called 'Comments/Workflow Tracking'. This will show if the transaction is updated in PeopleSoft Job Data automatically or if it needs an approval before being processed.

NOTE:

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

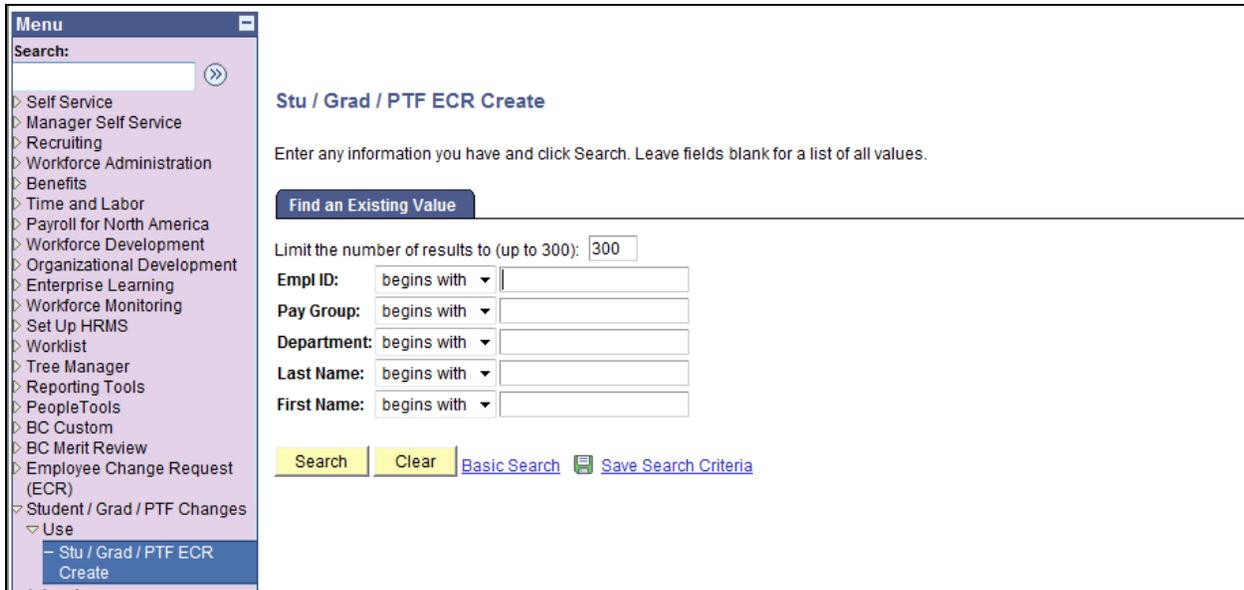
- When the employee is a Foreign employee, the transaction must be approved by the Foreign Tax group in the HRSC.
- If the funding is fund 500x, the workflow will be directed to OSP for approval.

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

PTF/Grad/Student Search

Employee Search Criteria

Empl ID: 21354210 John Jones **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	Effdt	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	Trans 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 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

PTF/Grad/Student Search

Employee Search Criteria

Empl ID: 23819038 Shelly Smith

Effective Date: 08/01/2015

ECR Action: Earnings Distributions & Exten

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	Effdt	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary	
5	Create ECR	0	08/01/2015	Short Work Break	Short Work Break	GRD-Short Work Break - Grad	025301	Residential Life	00012573	Grad Asst-Other 15	<input checked="" 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	Trans ID	Rcd	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
Select		0							

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

Change Request		Comments/Workflow Tracking	
GRADUATE ASSISTANT JOB EARNINGS DISTRIBUTION			
Request ID: NEW	Empl ID: 3819038	Total Number of Records:	Other Job Records
Status:	Name:	Rcd#: 0	Job Summary
Empl Status: Work Break	Benefit Program: NOB	<input checked="" type="checkbox"/> Primary	
Department: 025301 Residential Life	BC Annual Salary: \$2,500.00	Benefits Base:	
Position: 00012573 Grad Asst-Other 15	Comp Rate: \$1,250.000000	Periods/Yr: 2.00	
Job Code: 190240 Grad Asst-Other 15	Pay Group: GRD	Comp Freq: M	
Citizenship: Not Indic.	Reg/Temp: Temporary	FT/PT: Part-Time	
Visa Type:	Empl Class: G-GradAsst	Std Hrs: 15.00	
Visa Exp Dt:	Service Date: 09/01/2014	Rehire Date: 09/01/2014	
	Hire Date: 09/01/2014	<input type="checkbox"/> BC Budgeted Position	

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.

Processing a Job Earning Distribution/Extension (Lower Section)

Change Request
Comments/Workflow Tracking

GRADUATE ASSISTANT JOB EARNINGS DISTRIBUTION

Request ID: NEW	Empl ID:	Total Number of Records:	Other Job Records
Status:	Name:	Rcd#: 0	Job Summary

Empl Status: Work Break	Benefit Program: NOB	<input checked="" type="checkbox"/> Primary
Department: 025301 Residential Life	BC Annual Salary: \$2,500.00	Benefits Base:
Position: 00012573 Grad Asst-Other 15	Comp Rate: \$1,250.000000	Periods/Yr: 2.00
Job Code: 190240 Grad Asst-Other 15	Pay Group: GRD	Comp Freq: M
Citizenship: Not Indic.	Reg/Temp: Temporary	FT/PT: Part-Time
Visa Type:	Empl Class: G-GradAsst	Std Hrs: 15.00
Visa Exp Dt:	Service Date: 09/01/2014	Rehire Date: 09/01/2014
	Hire Date: 09/01/2014	<input type="checkbox"/> BC Budgeted Position

Transaction Type Earnings Distributions & Exten 6

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

Start Date: 02/01/2015	Stop Date: 07/31/2015	7
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Account Codes Find View All First 1 of 1 Last										
Account Code: 25301-350-10000-53320D001	8									
DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
025301	350	10000	00000		00000	501	53320	GRN	100.000	D001

FICA Status-Employee Subject 9

New Distributions/Extensions
Find First 1 of 1 Last

Start Date: 08/01/2015	*Stop Date: 08/31/2015	Pay Periods for This Distribution: 1.00	10
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*Department: 025301 Residential Life	12		
*Account Code: 25301-350-10000-53320D001	Rate Amt: 1250.000000	*Dist Percent: 100.000	Budget Amt: 1250.000

Available Budget Amount: 181917.000	Budget Amount After Transaction: 180667.000	Budget Check Status: Passed
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DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Seq#
025301	350	10000	00000		00000	501	53320	D001

Comment:

[Return to Search](#)
Submit 13

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.
 - o 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

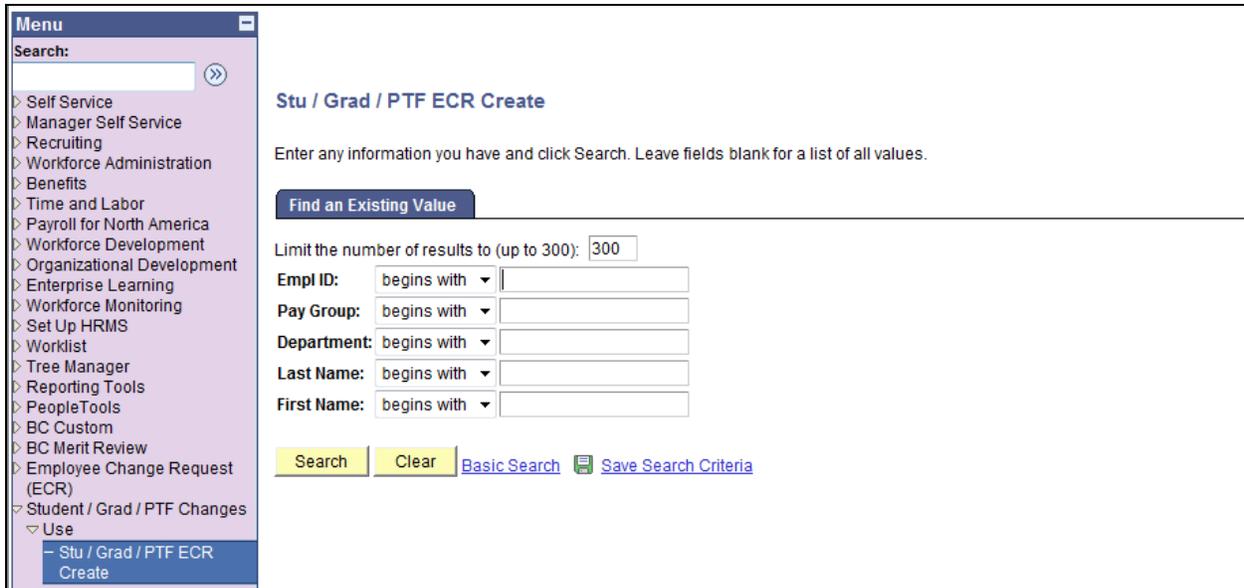
- After the job earning distribution is submitted, the workflow approval path is displayed on the second tab called 'Comments/Workflow Tracking'. This will show where the transaction is within the process.
- The request can be viewed by the originator and the approver(s) at any point during the workflow 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

PTF/Grad/Student Search

Employee Search Criteria

Empl ID: 21354210 John Jones 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 Customize | Find | | First 1 of 1 Last

	Rcd	Effdt	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
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 Customize | Find | | 1 of 1

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

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	Effdt	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary	
5	<input type="button" value="Create ECR"/>	0	05/17/2015	Active	Return from Work Break	RWB-Return Short Work Break	025301	Residential Life	00006739	Student Job Class C	<input type="checkbox"/>
	<input type="button" value="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	<input checked="" type="checkbox"/>
	<input type="button" value="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	<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	Trans ID	Rcd	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
<input type="button" value="Select"/>		0							

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

Change Request		Comments/Workflow Tracking	
PART-TIME FACULTY PAY RATE CHANGE			
Request ID: NEW	Empl ID: 4390133	Total Number of Records:	Other Job Records
Status:	Name:	Rcd#: 4	Job Summary
Empl Status: Work Break	Department: 051021	Position: 00011850	Job Code: 103200
Citizenship:	Visa Type:	Visa Exp Dt:	
	Ofc International Programs	Faculty Overload	Faculty Overload
	Benefit Program:	BC Annual Salary	Comp Rate:
	<input type="checkbox"/> Primary	\$6,850.00	\$6,850.000000
	Benefits Base:	Pay Group:	Reg/Temp:
	Periods/Yr: 1.00	MON	Temporary
	Comp Freq: M	Empl Class:	Service Date:
	FT/PT: Part-Time	M-FtFac	09/01/1998
	Std Hrs: 15.00	Hire Date:	09/01/1998
	Rehire Date: 09/01/2000		
	<input type="checkbox"/> BC Budgeted Position		

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.

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

Change Request
Comments/Workflow Tracking

PART-TIME FACULTY PAY RATE CHANGE

Request ID: NEW	Empl ID: 43901335	Total Number of Records:	Other Job Records
Status:	Name: Kathleen T Bailey	Rcd#: 4	Job Summary

Empl Status: Work Break	Benefit Program: <input type="checkbox"/> Primary	Benefits Base:
Department: 051021 Ofc International Programs	BC Annual Salary: \$6,850.00	Periods/Yr: 1.00
Position: 00011850 Faculty Overload	Comp Rate: \$6,850.000000	Comp Freq: M
Job Code: 103200 Faculty Overload	Pay Group: MON	FT/PT: Part-Time
Citizenship:	Reg/Temp: Temporary	Std Hrs: 15.00
Visa Type:	Empl Class: M-FFac	Rehire Date: 09/01/2000
Visa Exp Dt:	Service Date: 09/01/1998	<input type="checkbox"/> BC Budgeted Position
	Hire Date: 09/01/1998	

Transaction Type: Pay Rate Dist Change/EXTENSION 1

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

Start Date: 06/01/2015 Stop Date: 06/30/2015 2

Account Codes: Find | View All | First 1 of 1 | Last

Account Code: 51021-100-10000-53110P003 3																							
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">DeptID</th> <th style="text-align: left;">Fund</th> <th style="text-align: left;">Fund Srce</th> <th style="text-align: left;">Program</th> <th style="text-align: left;">Proj/Grt</th> <th style="text-align: left;">Property</th> <th style="text-align: left;">Func</th> <th style="text-align: left;">Account</th> <th style="text-align: left;">Earn Code</th> <th style="text-align: left;">Percent</th> <th style="text-align: left;">Seq#</th> </tr> </thead> <tbody> <tr> <td>051021</td> <td>100</td> <td>10000</td> <td>11066</td> <td></td> <td>00000</td> <td>101</td> <td>53110</td> <td>OVL</td> <td>100.000</td> <td>P003</td> </tr> </tbody> </table>	DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#	051021	100	10000	11066		00000	101	53110	OVL	100.000	P003	
DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#													
051021	100	10000	11066		00000	101	53110	OVL	100.000	P003													

FICA Status-Employee Subject 4

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

Effective Date: 07/01/2015 5

New BC Annual Salary	New Monthly Comp Rate	Change Percent	Annual Salary Change Amount	Monthly Change Amt
<input type="text"/>	<input type="text" value="6"/> 6	<input type="text"/>	0.00	

New Distributions/Extensions: Find | First 1 of 1 | Last

*Start Date: 07/01/2015 *Stop Date: 7 31 Pay Periods for This Distribution

*Department	051021 Ofc International Programs	*Account Code	Rate Amt	*Dist Percent	Budget Amt			
		8	<input type="text"/>	10	<input type="text"/>			
Available Budget Amount:	9 0.000	Budget Amount After Transaction:	0.000					
DeptID	Fund	Fnd Srce	Program	Proj/Grt	Property	Func	Account	Seq#

Comment:

11

[Return to Search](#)
Submit 12

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.

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

- 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

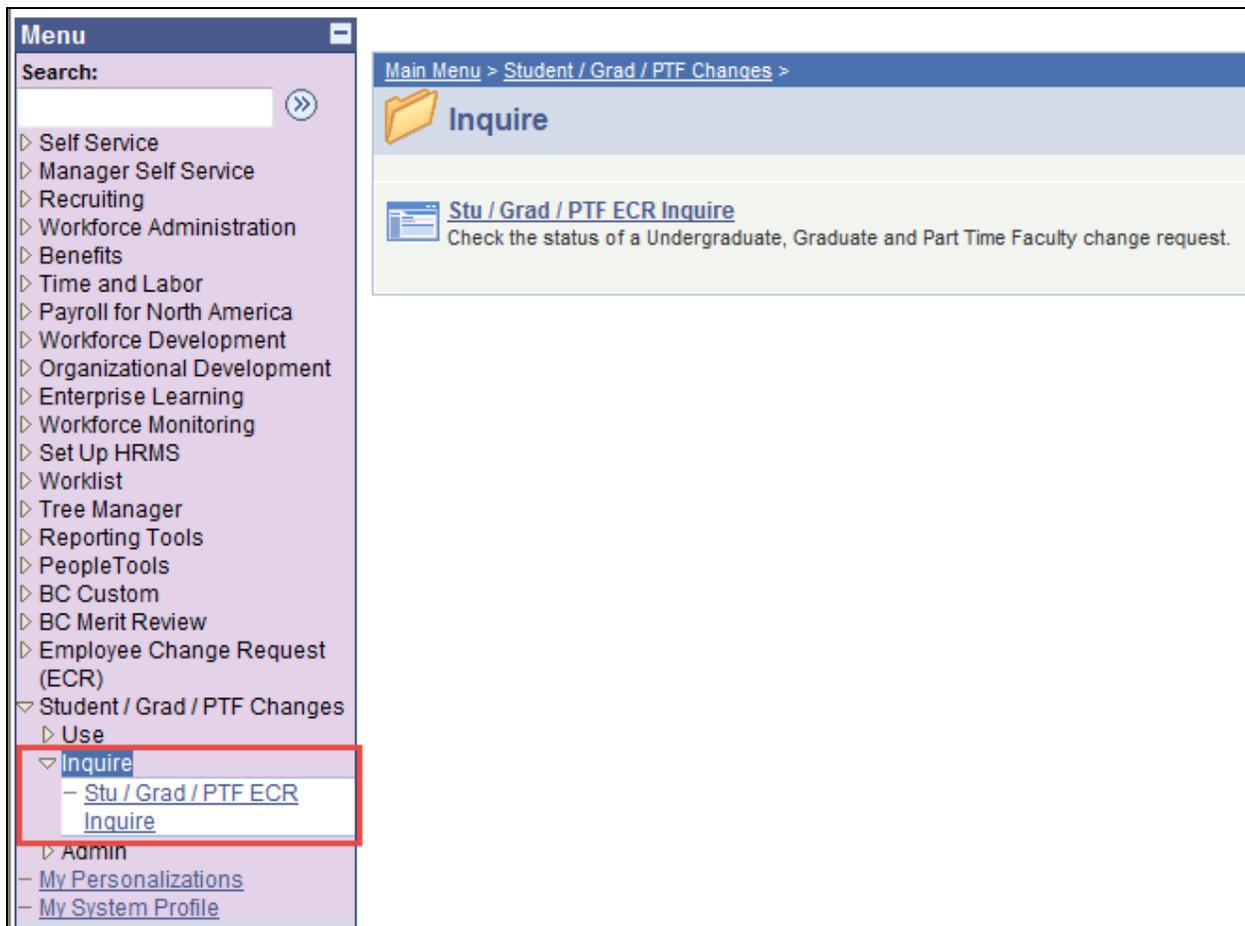
Request ID: 21758	ECR Status: Completed
Empl ID: 49842224	Rcd#: 1

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



The screenshot displays a web application interface. On the left is a 'Menu' sidebar with a search field and a list of categories. The 'Student / Grad / PTF Changes' category is expanded, and the 'Inquire' sub-item is highlighted with a red box. The 'Inquire' sub-item has a dropdown arrow and contains two links: 'Stu / Grad / PTF ECR Inquire' and 'Inquire'. The main content area on the right shows a breadcrumb trail 'Main Menu > Student / Grad / PTF Changes >' and a folder icon labeled 'Inquire'. Below the folder icon is a link 'Stu / Grad / PTF ECR Inquire' with a description: 'Check the status of a Undergraduate, Graduate and Part Time Faculty change request.'

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

Stu/Grad/PTF Search

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

Request ID: 1 Department:

Empl ID: Transaction Type:

Last Name: ECR Status:

First Name: From Date: End Date:

Originator UserID:

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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	Position	Title
3 <input type="button" value="Select"/>	21734	14708081		2	06/14/2015	Pay Rate Change	Pending	Susan Cantillon	Route to Foreign Tax	07/01/2015 2:13PM	023113	Catering & Event Planning	00008593	Student Job Class C
<input type="button" value="Select"/>	21735	41933597		3	07/20/2015	Terminate	Completed	Anthony Anderson	CRONIND	07/07/2015 9:15AM	050301	Academic Research Services	00009200	Graduate Assistant Summer
<input type="button" value="Select"/>	21736	10205482		0	06/21/2015	Pay Rate Change	Completed	Beth A Burns	BURNSBE	07/07/2015 9:29AM	023109	BCDS Corcoran Commons	00005516	Student Job Class C

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.