

PeopleSoft HR

ECR Automation Process

Long Term Disability

May 2011

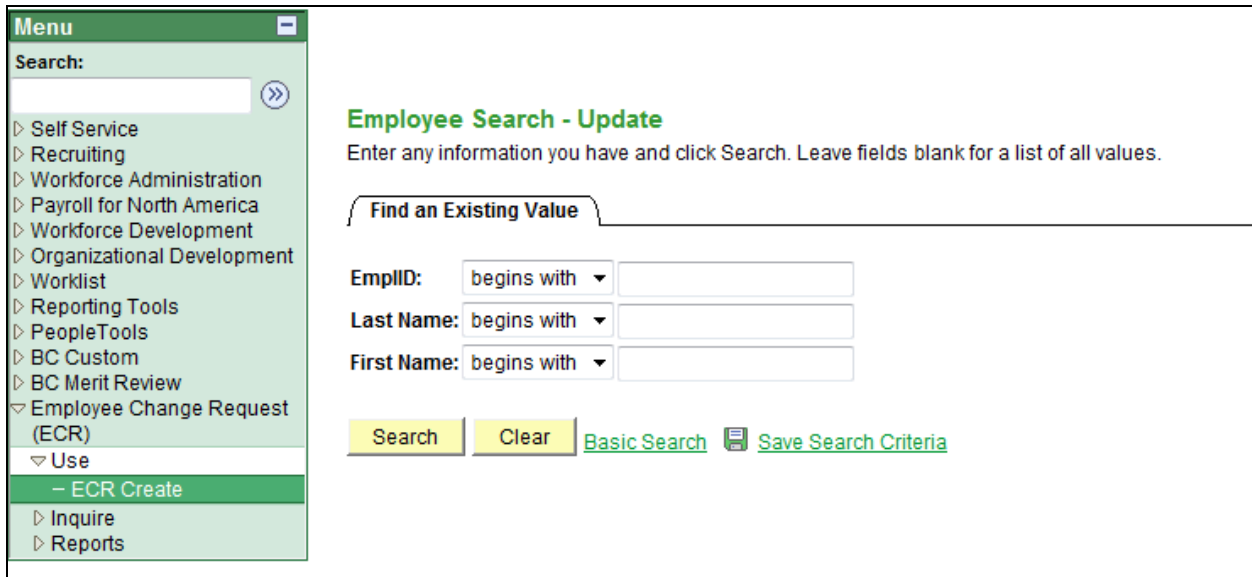
# Processing a Long Term Disability LTD

## ECR Search Page



To process an LTD transaction 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										Customize   Find	First	1 of 1	Last
Rcd#	Eff Date	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary				
<input type="button" value="Create ECR"/>	0												

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	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 LTD. This is the Effective Date that will be reflected in PeopleSoft HR.
3. Select “**Long Term Disability**” from the ECR Action drop down field.
4. Click the Search button to display the Employee Jobs for the employee. This will display all 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: 62694707      Stephen B Fitzmeyer

Effective Date: 06/01/2011

ECR Action: Long Term Disability

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   <input type="button" value="List"/>	First <input type="button" value="1 of 1"/> Last
	Rcd#	Eff Date	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary	
5	<input type="button" value="Create ECR"/>	0	06/01/2011	Active	Pay Rate Change	ANN-Annual Merit Increase	010261	Marketing Communications	00004767	Senior Digital Media & Web Developer	<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										Customize   Find   <input type="button" value="List"/>	1 of 1
Select	Request 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 for the Long Term LTD.

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

# ECR Long Term Disability Request Page

Change Request

Comments/Workflow Tracking

## LONG TERM DISABILITY

<b>Request ID:</b> NEW	<b>EmpID:</b>	<b>Total Number of Records:</b> 1	<a href="#">Other Job Records</a>
<b>Status:</b>	<b>Name:</b> Stephen B	<b>Rcd#:</b> 0	

<b>Empl Status:</b> Active	<b>Benefit Program:</b> BC1	<input checked="" type="checkbox"/> <b>Primary</b>	
<b>Department:</b> 010261 Marketing Communications	<b>BC Annual Salary:</b>	<b>Benefits Base:</b>	
<b>Position:</b> 00004767	<b>Comp Rate:</b>	<b>Periods/Yr:</b> 12.00	
<b>Job Code:</b> 250010	<b>Pay Group:</b> MON	<b>Comp Freq:</b> M	
<b>Citizenship:</b> Not Indic.	<b>Reg/Temp:</b> Regular	<b>FT/PT:</b> Full-Time	
<b>Visa Type:</b>	<b>Empl Class:</b> A-FAdmin	<b>Std Hrs:</b> 35.00	
<b>Visa Exp Dt:</b>	<b>Service Date:</b> 10/11/2010	<b>Rehire Date:</b> 10/11/2010	
	<b>Hire Date:</b> 10/11/2010	<input checked="" type="checkbox"/> <b>BC Budgeted Position</b>	

Information specific to the employee and important for processing a Long Term LTD 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							
<b>Other Job Records for which you have access</b> <span style="float: right;">1 of 1</span>								
<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 Long Term Disability Page (Lower Section)

Change Request
Comments/Workflow Tracking

LONG TERM DISABILITY

Request ID: NEW	EmplID:	Total Number of Records: 1	<a href="#">Other Job Records</a>
Status:	Name: Stephen B I	Rcd#: 0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary	
Department: 010261 Marketing Communications	BC Annual Salary:	Benefits Base:	
Position: 00004767	Comp Rate:	Periods/Yr: 12.00	
Job Code: 250010 Sr. DigitalMedia &WebDeveloper	Pay Group: MON	Comp Freq: M	
Citizenship: Not Indic.	Reg/Temp: Regular	FT/PT: Full-Time	
Visa Type:	Empl Class: A-FtAdmin	Std Hrs: 35.00	
Visa Exp Dt:	Service Date: 10/11/2010	Rehire Date: 10/11/2010	
	Hire Date: 10/11/2010	<input checked="" type="checkbox"/> BC Budgeted Position	

Transaction Type: Long Term Disability

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

Start Date: 10/11/2010	Stop Date:
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<b>Account Codes</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>										
Account Code: 10261-100-10000-51100D001										
DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
010261	100	10000	00000		00000	603	51100	MRG	100.000	D001

6 \*FICA Status-Employee Subject

**Long Term Disability**

Effective Date: 06/01/2011	Action: LTO	Change Reason: <span style="border: 1px solid gray; padding: 2px;"> </span> <span style="border: 1px solid red; padding: 2px;">7</span>
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**Vacation Additional Data**

<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="background-color: #e0e0e0; font-weight: bold; font-size: small;">Applied Vacation Time</td> </tr> <tr> <td style="font-size: x-small;">*BC Days Hours:</td> <td style="font-size: x-small;">Days <span style="border: 1px solid gray; padding: 2px;"> </span></td> </tr> <tr> <td style="font-size: x-small;">Vacation:</td> <td style="font-size: x-small;"><span style="border: 1px solid gray; padding: 2px;"> </span> <span style="border: 1px solid red; padding: 2px;">8</span></td> </tr> <tr> <td style="font-size: x-small;">Sick:</td> <td style="font-size: x-small;"><span style="border: 1px solid gray; padding: 2px;"> </span></td> </tr> </table>	Applied Vacation Time		*BC Days Hours:	Days <span style="border: 1px solid gray; padding: 2px;"> </span>	Vacation:	<span style="border: 1px solid gray; padding: 2px;"> </span> <span style="border: 1px solid red; padding: 2px;">8</span>	Sick:	<span style="border: 1px solid gray; padding: 2px;"> </span>	Comments: <span style="border: 1px solid red; padding: 2px;">9</span> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
Applied Vacation Time									
*BC Days Hours:	Days <span style="border: 1px solid gray; padding: 2px;"> </span>								
Vacation:	<span style="border: 1px solid gray; padding: 2px;"> </span> <span style="border: 1px solid red; padding: 2px;">8</span>								
Sick:	<span style="border: 1px solid gray; padding: 2px;"> </span>								

Comments: 10

Submit 11

[Return to Search](#)

6. Verify the FICA Status of the employee. This is very important when processing a LTD. In particular, if the employee is a foreign employee.
7. Select the Change Reason for the LTD. At this point, a discussion has most likely taken place with the Benefits Office to clarify effective date and reason. This is a drop down field.
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.

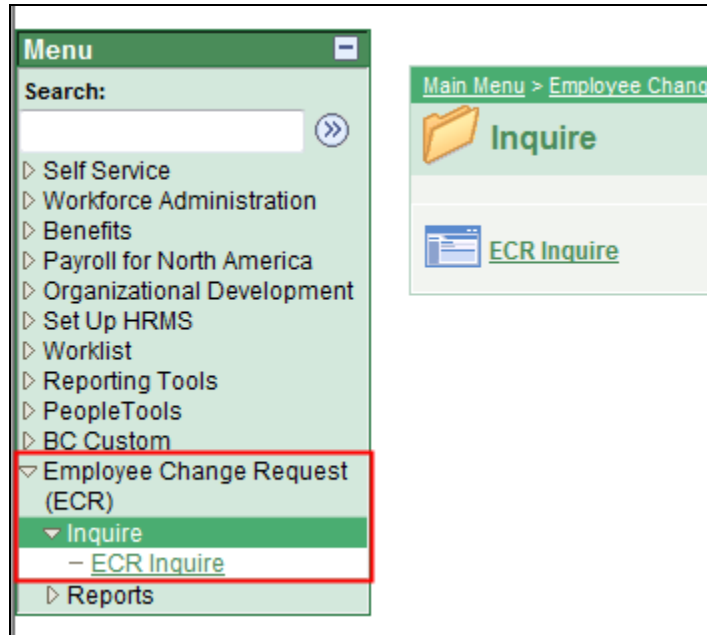


## ECR Long Term Disability Comments/Workflow Tracking Page

<b>Change Request</b>		<b>Comments/Workflow Tracking</b>	
<b>Request ID:</b>	2162	<b>ECR Status:</b>	Completed
<b>EmplID:</b>	83018766	<b>Rcd#:</b>	0
<b>Comments / Tracking</b> <span style="float: right;">1-4 of 4</span>			
<b>User Name</b>	<b>DateTime</b>	<b>Action</b>	<b>Comment</b>
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.
<b>Review Workflow Routing</b> <span style="float: right;">1-5 of 5</span>			
<b>Description</b>	<b>Action</b>	<b>Oprid</b>	<b>DateTime Stamp</b>
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 LTD 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

### LONG TERM DISABILITY

Request ID: 2163	EmpID:	Total Number of Records: 1	<a href="#">Other Job Records</a>
Status: Pending Benefits Approval	Name:	Empl Rcd#: 0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 060021	BC Annual Salary:	Benefits Base: \$59,000.000
Position: 00011394	Comp Rate:	Periods/Yr: 12.00
Job Code: 242750	Pay Group: MON	Comp Freq: M
Citizenship: Not Indic.	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FlAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 01/03/2011	Rehire Date: 01/03/2011
	Hire Date: 01/03/2011	<input checked="" type="checkbox"/> BC Budgeted Position

Transaction Type: Long Term Disability

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

Start Date: 01/03/2011    Stop Date:

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

Account Code: 60021-100-10000-51100D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
060021	100	10000	00000		00000	202	51100	MRG	100.000	D001

\*FICA Status-Employee

**Long Term Disability**

Effective Date: 06/11/2011    Action: LTO    Change Reason:

**Vacation Additional Data**

<p><b>Applied Vacation Time</b></p> <p>*BC Days Hours: <input type="text" value="Days"/></p> <p>Vacation: <input type="text" value="4.00"/></p> <p>Sick: <input type="text" value="1.00"/></p>	<p>Comments:</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> <p>new employee heading out on LTD. Agreed to pay days.</p> </div>
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Comments:

[Return to Search](#)

Cancel

- 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

[Detail View](#) Work List Filters: Review LTD Transaction

From	Date From	Work Item	Worked By Activity	Priority	Link
Susan Hynes	05/03/2011	Review LTD Transaction	BC_TRXN_DISABILITY		<a href="#">35020710_06/11/2011</a>

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 LTD filter name is 'Review LTD 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.

### LONG TERM DISABILITY

Request ID: 2163	EmplID: 35020710	Total Number of Records: 1	<a href="#">Other Job Records</a>
Status: Denied	Name:	Empl Rcd#: 0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 060021	BC Annual Salary:	Benefits Base: \$59,000.000
Position: 00011394	Comp Rate:	Periods/Yr: 12.00
Job Code: 242750	Pay Group: MON	Comp Freq: M
Citizenship: Not Indic.	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FtAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 01/03/2011	Rehire Date: 01/03/2011
	Hire Date: 01/03/2011	<input checked="" type="checkbox"/> BC Budgeted Position

Transaction Type: Long Term Disability

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

Start Date: 01/03/2011 Stop Date:

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

Account Code: 60021-100-10000-51100D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
060021	100	10000	00000		00000	202	51100	MRG	100.000	D001

\*FICA Status-Employee

#### Long Term Disability

Effective Date: 06/11/2011 Action: LTO Change Reason:

#### Vacation Additional Data

##### Applied Vacation Time

\*BC Days Hours:

Vacation:

Sick:

##### Comments:

new employee heading out on LTD. Agreed to pay days.

#### Benefits - Long Term Disability Data

Department:  Shared Financials - HRBenefits Position Number:  Leave of Absence

Job Code: 000080 Leave of Absence Pay Group: MON Monthly Salaried Employee

##### Comments:

[Return to Search](#)

4

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.



Change Request **Comments/Workflow Tracking**

### LONG TERM DISABILITY

<b>Request ID:</b> 2163	<b>EmplID:</b> 35020710	<b>Total Number of Records:</b> 1	<a href="#">Other Job Records</a>
<b>Status:</b> Denied	<b>Name:</b>	<b>Empl Rcd#:</b> 0	

<b>Empl Status:</b> Active	<b>Benefit Program:</b> BC1 <input checked="" type="checkbox"/> <b>Primary</b>	<b>Benefits Base:</b> \$59,000.000
<b>Department:</b> 060021	<b>BC Annual Salary:</b>	<b>Periods/Yr:</b> 12.00
<b>Position:</b> 00011394	<b>Comp Rate:</b>	<b>Comp Freq:</b> M
<b>Job Code:</b> 242750	<b>Pay Group:</b> MON	<b>FT/PT:</b> Full-Time
<b>Citizenship:</b> Not Indic.	<b>Reg/Temp:</b> Regular	<b>Std Hrs:</b> 35.00
<b>Visa Type:</b>	<b>Empl Class:</b> A-FtAdmin	<b>Rehire Date:</b> 01/03/2011
<b>Visa Exp Dt:</b>	<b>Service Date:</b> 01/03/2011	<input checked="" type="checkbox"/> <b>BC Budgeted Position</b>
	<b>Hire Date:</b> 01/03/2011	

**Transaction Type:** Long Term Disability

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

**Start Date:** 01/03/2011 **Stop Date:**

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

<b>Account Code:</b> 60021-100-10000-51100D001										
DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
060021	100	10000	00000		00000	202	51100	MRG	100.000	D001

**\*FICA Status-Employee:**

**Long Term Disability**

**Effective Date:** 06/11/2011 **Action:** LTO **Change Reason:**

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**Vacation Additional Data**

<p><b>Applied Vacation Time</b></p> <p>*BC Days Hours: <input type="text" value="Days"/></p> <p>Vacation: <input type="text" value="4.00"/></p> <p>Sick: <input type="text" value="1.00"/></p>	<p><b>Comments:</b></p> <p>new employee heading out on LTD. Agreed to pay days.</p>
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**Comments:**

[Return to Search](#)

5

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

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

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<b>Request ID:</b> 2163	<b>ECR Status:</b> Denied
<b>EmplID:</b> 35020710	<b>Rcd#:</b> 0

Comments / Tracking <span style="float: right;">1-3 of 3</span>			
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 <span style="border: 1px solid red; padding: 2px;">6</span>
Susan Hynes	05/03/2011 12:04PM	Submitted	TRY AGAIN WITH CORRECT DAYS

Review Workflow Routing <span style="float: right;">1-4 of 4</span>			
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.