

JOB REQUESTS

Overview

Job Requests is one of the most critical areas of payroll processing. This is where the user can enter, update, and view information regarding an employee's job. This is also where the user can access and input information such as data changes, position and salary change requests, and general comments. This chapter will also discuss the *Job Request Status* and *Job Summary* pages.

Objectives

By the end of this chapter, the participant will be able to:

- Add an employee's salary
- View *Job Request Status*
- View *Job Summary*
- Change an employee's position
- Enter data changes
- Enter general comments.



OBJECTIVE:

- Introduce the format of the Job Request chapter.

TALKING/KEY POINTS:

- The Job Request chapter is divided into four sections:
 - Entering a Pay Rate Change Request
 - Entering a Position Change Request
 - Entering Data Changes
 - Recording General Comments.
- Job Requests are on one page.
- Each part contains its own Introduction, Concepts, and Exercises.
- The first topic we will cover is Entering a Pay Rate Change Request.
- In PayServ, the Job Request will be evaluated to determine if all the information is correct and can be approved when the transaction is saved. If the transaction passes all tests for auto-approval, it will be marked auto-approved and the Job record will be updated.

Pay Rate Change Request

Introduction

Entering a Pay Rate Change Request is the process used to record pay information for an employee. Information such as Pay Rate, Increment Code, FIS Amount, and Anniversary Date is captured during this process.

Objectives:

- Understand PayServ functionality related to Pay Rate Change Requests including:
 - Auto-Approvals
 - Effective Dates
 - Job Request Status.



OBJECTIVE:

- Show Pay Change Request with Auto-Approval for a New Hire.

TALKING/KEY POINTS:

- A Pay Rate Change Request must be completed for new hires, rehires, and concurrent hires.
- Based on the Action selected, the fields required to complete the transaction will appear. While some displayed fields will be required for data entry, not all of the displayed fields are required fields.
- Stress to the class that the Pay Rate Change Request is an example of a transaction that will auto-approve.

Exercise 1: Enter a Pay Change Request



Scenario: Cheryl Snyder is a new employee. The Payroll Office must enter her salary into PayServ. Enter the necessary information to process this transaction through auto-approval.

Step 1. Navigate to the Job Action Requests page

Navigate to: *Workforce Administration > Administer Job Change Requests > Job Action Request.*

- Bring up the record for Cheryl Snyder using the Empl ID provided by the instructor.

The screenshot shows a web-based interface for "Job Requests1". At the top, it displays the employee name "SNYDER, CHERYL", ID "N01932778", and "Rcd#: 0". Below this is a "Current Job" section with fields for Position (00116014), Department (20010 Tax&Fin), Job Code (000578 TAX COMPLN), Job Date/Effseq (07/31/2015), and Barg. Unit/Grade (02 011). The "Proposed Change" section is active, showing a "Request" button, "Status: Initiated", and "*Status Dt: 08/12/2015". There is also a "Status Reason" field. At the bottom, there are "Save" and "Return to Search" buttons. The interface includes navigation links like "Find", "View All", "First", "1 of 1", and "Last".

- Click **Pay Change**. Additional fields will appear below the **Pay Change** button.



OBJECTIVE:

- Discuss the four fields available for data entry on a **Pay Change** request.

TALKING/KEY POINTS:

- Only four fields are available for a pay change request.
- Only one transaction may be entered at a time. If another transaction is necessary, add a new row.
- Emphasize that various warning and error messages will appear if the user enters incomplete or incorrect data.
- The status box in the lower right corner provides a status of the request. The statuses are Initiated, Requested, Approved, Denied, and Approved with Changes.
- The **Status Date** field will change when a status changes.

Exercise 1 (continued)

Step 2. From this page, enter the information in the bullets listed below

- Enter 07/31/2015 for the **Effective Date**. Enter 1 in the **Seq #** field because there is already a Hire row with this date to indicate that this is the second transaction completed on this date.
- Enter NEW in the **Reason** field because this person is a new hire.
- Hit the Tab key. This action will move you out of the **Reason** field and the lookup. Additional fields will appear below the **Action/Reason** fields.

The screenshot displays the 'Job Requests' interface for SNYDER, CHERYL (ID: N01932778, Rcd#: 0). The 'Current Job' section shows Position: 00116014, Department: 20010, Job Date/Effseq: 07/31/2015, and Barg. Unit/Grade: 02 011. The 'Proposed Change' section is for a 'Pay Change' with an effective date of 07/31/2015 and sequence number 1. The action/reason is 'NEW'. A 'Request' box in the lower right shows the status as 'Initiated' with a status date of 08/12/2015. Other fields include Pay Rate, Incr. Code, Anniversaries, and FIS Amount. The bottom status bar indicates 'Bargaining / Grade: 02 011', 'Position Status: Approved A', and 'Pay Basis Code: ANN'.



The status box in the lower right corner provides a status of the request. The statuses are Initiated, Requested, Approved, Denied and Approved with Changes. The Status Date field will change as the status changes.



OBJECTIVE:

- Show the Error Messages and Auto-Approval process.

TALKING/KEY POINTS:

- Remind class not to **SAVE** unless instructed to do so.
- This activity highlights edits for a Pay Rate Change.
- If certain **Increment Codes** are entered, **FIS Amounts** also will be necessary.
- Users can either use the looking glass  to look up codes, or if the code is known, it can be entered into the field. Tab twice to clear the field, as well as the lookup.
- After clicking **Request**, the user may encounter multiple warning messages if any of the data entered is incorrect. **Request** will change the status, but the change is only temporary until the transaction is saved.
- If the user makes no changes after receiving a warning and saves the request, the status will move directly to Requested.
- Show the class the messages that will be received upon clicking **Save**.

Exercise 1 (Continued)

Step 3. From this page, enter the information listed in the instructions below

- Enter 39998.00 in the **Pay Rate** field.
- Enter 1003 in the **Incr. Code** field.
- Enter 07/31/2015 in the **Anniversary Dt** field.

Job Requests1

SNYDER, CHERYL ID: N01932778 Rcd#: 0

Current Job

Position: 00116014 Job Date/Effseq: 07/31/2015 0
 Department: 20010 Tax&Fin Barg. Unit/Grade: 02 011
 Job Code: 000578 TAX COMPLN Salary:

Proposed Change Find | View All First 1 of 1 Last

Pay Change Comments + -

*Eff Date/Seq #: 07/31/2015 1
 *Action/Reason: Pay Rt Chg NEW New Em Sa

Pay Rate: 39998.00 ANN
 Incr. Code: 1003
 Anniversary Dt: 07/31/2015
 FIS Amount:

Bargaining / Grade: 02 011 Position Status: Approved A
 Unit
 Class/Uncl: 0 Pay Basis Code: ANN

Request

Status: Initiated
 *Status Dt: 08/12/2015
 Status Reason:

Save Return to Search

- Click **Request**. A system edit verifies the pay rate for new hires. Because this is the incorrect hiring rate for this position, the request results in the following error message.

Message

Warning -- Requested salary rate must be at hiring rate when Action of PAY and Reason of NEW is used. (24000,105)

Requested salary rate should be the hiring rate when Action of PAY and Reason of NEW or RHS is used.(Validation B1-14 + Approvals for rehires)

OK

- A second message appears verifying that the user wants to continue requesting the transaction.

Message

One or more warning messages issued. Request change anyway? (24000,136)

One or more warnings messages issued.
 If 'YES' button is clicked, data can be saved as requested. Otherwise, the status of the transaction will remain initiated so that necessary corrections can be made.

Yes No



OBJECTIVE:

- Discuss how to correct errors and process an Auto-Approval.

TALKING/KEY POINTS:

- This activity highlights changing incorrect data and saving for an Auto-Approval.

Exercise 1 (continued)

Step 4. From this page, enter the information listed in the instructions below

- Click **OK**. The system will allow the user to re-enter the correct information. Enter the correct rate of 37998.00 in the **Pay Rate** field.
- Click **Request**. Notice the **Status** field has changed to Auto-Approved. Do not save the transaction.

The screenshot displays the 'Job Requests1' interface for user SNYDER, CHERYL (ID: N01932778, Rcd#: 0). It is divided into three main sections:

- Current Job:** Position: 00116014, Department: 20010, Job Code: 000578, Job Date/Effseq: 07/31/2015 0, Barg. Unit/Grade: 02 011, Tax&Fin: TAX COMPLN, Salary: [blank].
- Proposed Change:** Includes a 'Pay Change' button, 'Comments' link, and fields for *Eff Date/Seq #: 07/31/2015 1, *Action/Reason: Pay Rt Chg NEW, Pay Rate: 37998.00 ANN, Incr. Code: 1003, Anniversary: 07/31/2015, Dt: [blank], FIS Amount: [blank].
- Request Panel:** A 'Request' button is present. The Status is currently 'Requested' and can be changed to 'Auto Approved'. *Status Dt: 08/12/2015. A 'Status Reason' field is also available.

At the bottom, summary information includes: Bargaining / Grade: 02 011, Position Status: Approved A, Unit, Class/Uncl: 0, and Pay Basis Code: ANN.



Clicking the **Request** button will change the Status. Saving activates additional edits which will then determine the final status of this transaction.



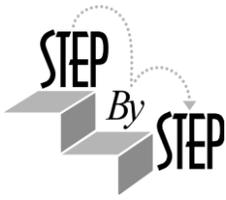
OBJECTIVE:

- Review the *Job Request Status* page.

TALKING/KEY POINTS:

- Transactions that have been Denied or Approved with Changes stay on the *Job Request Status* page for 30 calendar days.
- Processed transactions (Approved and Auto-Approved) will only appear until they roll to Job. A behind-the-scenes process runs to remove them from this record.
- Transactions appear on this page in Effective Date order, with the most recent transaction at the top.
- The process is not run in class, so the auto-approved transactions still appear on the *Job Request Status* page.

Exercise 2: View Job Request Status



Step 1. Navigate to the page shown below

Navigate to: *Workforce Administration > Administer Job Change Requests > Job Request Status Inquiry.*

- Review the *Job Request Status* page for Cheryl Snyder. This will detail any requests and the current status.

Job Req Status															
Name: SNYDER, CHERYL															
Empl ID: N01932778 Empl Record: 0															
EffDt	EffSeq	Action	Reason	Position	NYS Postn	Line Nbr	Service Date	Salary	FICA Stat	Inc Cd	FIS Amount	Extra Srvc	Status	Auto App'd	Status Date
1	07/31/2015	1	PAY	NEW			07/31/2015	\$37,998.00		1003		N	Processed	Y	08/12/2015



Transactions appear on this page in Effective Date order, with the most recent transaction at the top.



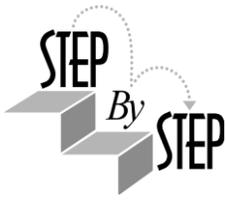
OBJECTIVE:

- Review the *Job Summary* page and show the auto-approved transactions on the Job record.

TALKING/KEY POINTS:

- Remind the class that the *Job Summary* pages are view only. There will be no data entry possible.
- Discuss how the *Job Summary* pages and the *Statewide Job Summary* pages are the same views, but with different security access.
- Emphasize that the user can print out these pages but this should be done only as needed for business purposes – particularly with employee data from other agencies.
- Emphasize that the user can use **View All** to see all rows of data.
- The page will display seven rows at a time unless the **View All** option is used. If the next and previous arrows are used, the system will display the next seven rows or the previous seven rows.
- Explain each tab and explain DEF paygroup on the Work Location tab and time entry is not available until a paygroup is assigned (that evening since paygroup assignment runs at night).

Exercise 3: View Job Summary



Step 1. Navigate to the Job Summary

Navigate to: *Workforce Administration > Administer Job Change Request > Job Summary.*

- View the *Job Summary* for Cheryl Snyder. There should now be two Job rows for July 31, 2015.

Job Summary								
SNYDER, CHERYL		EMP	ID:	N01932778	Empl Record:	0		
Job Information								
General			Job Information			Work Location		
Effective Date	Seq	Action Description	Action Reason	Bargaining Unit	Appt Code	JC	Part-Time Pct	Pay Basis Code
07/31/2015	1	Pay Rate Change	New Employees Salary	02	PERM	Comp	1.0000	ANN
07/31/2015	0	Hire	Appoint	02	PERM	Comp	1.0000	ANN



Job Summary and *Statewide Job Summary* display the same information. On *Statewide Job Summary*, the user can access any employee in the database by entering the employee's National ID. On *Job Summary*, the user can access only employees for whom they have security access by using either **Basic** or **Advanced** Searches.



OBJECTIVE:

- Introduce the Position Change Request process.

TALKING/KEY POINTS:

- Position changes are used for promotions, demotions, training advances and reclassifications.
- The section will review edits for Position Changes in PayServ.
- Each transaction will be done separately – there are edits to prevent multiple job transactions with one Job Change Request.

Position Change Request

Introduction

A Position Change Request is used to record new position information about an employee's job. Information such as position number, pay rate, benefit flag, and other data are entered on the *Job Request* page. Position changes are used for promotions, demotions, training advances, and reclassifications. Edits used in Position changes are also used for Transfers.

Objectives:

- Enter a Position Change Request into PayServ using the *Job Action Requests* page.



OBJECTIVE:

- Review the edits for Position Change-Change Line.

TALKING/KEY POINTS:

- Select the **New Position** pushbutton.
- The data entry fields are limited to those required to change a line number.

Exercise 4: Enter a Position Change Request (Change Line)



Scenario: Cheryl Snyder has a position change due to a line number change. In this exercise, you will change her position and corresponding line number.

Step 1. Navigate to the Job Action Requests page

Navigate to: *Workforce Administration > Administer Job Change Requests > Job Action Request.*

Enter the **Empl ID** for Cheryl Snyder on the *Search* page. If you are still on the *Job Requests1* page, click  to enter a new row. The pushbuttons for **Pay Change**, **New Posn**, and **Data Chg** will become available.

Job Requests1			
SNYDER, CHERYL		ID: N01932778	Rcd#: 0
Current Job			
Position:	00116014	Job Date/Effseq:	07/31/2015 1
Department:	20010 Tax&Fin	Barg. Unit/Grade:	02 011
Job Code:	000578 TAX COMPLN	Salary:	37998.000000
Proposed Change			
<input type="button" value="Pay Change"/> <input type="button" value="New Posn"/> <input type="button" value="Data Chg"/>		Find View All First 1 of 1 Last	

- Click **New Posn**. Additional fields will appear below the **New Posn** button.
- Enter an **Effective Date** of 07/31/2015. Change the **Seq #** to 2.
- Enter the **Reason** of CHL (Change Line).
- After tabbing out of the **Reason** field, the **Position #** and **NYS Position** fields become available.

Job Requests1			
SNYDER, CHERYL		ID: N01932778	Rcd#: 0
Current Job			
Position:	00116014	Job Date/Effseq:	07/31/2015 1
Department:	20010 Tax&Fin	Barg. Unit/Grade:	02 011
Job Code:	000578 TAX COMPLN	Salary:	37998.000000
Proposed Change			
<input type="button" value="New Posn"/>		Comments	
*Eff Date/Seq #:	07/31/2015		2
*Action/Reason:	Posn Chg	CHL	Chg Line
Position #:			
NYS Position:			
Line #:			
Bargaining / Grade:		Position Status:	
Unit			
Class/Uncl:		Pay Basis Code:	
<div style="border: 1px solid gray; padding: 5px;"> <input type="button" value="Request"/> <p>Status: Initiated</p> <p>*Status Dt: 08/12/2015</p> <p>Status Reason:</p> </div>			



OBJECTIVE:

- Review the edits for incorrect data on the Position Change-Change Line Job Request.

TALKING/KEY POINTS:

- If the Action/Reason of Position Change-Change Line is used there will be no other editable fields, once the Position Number is entered. The user will only need to confirm that the Line Number has changed.
- There are system edits that check for differences in fields between the two positions, such as Bargaining Unit, Grade and Title. If these are not the same, or if there are differences in other fields, the code CHL cannot be used. The user will need to check if the Reason Code or the Line Number is incorrect.

Exercise 4 (continued)

Step 2. Enter the new position number associated with the new line number. Use an incorrect position to see system edits.

Enter the information in the bullets listed below.

- Enter the incorrect position number 00116033. Click **Request** to view the error message this request generates.

Job Requests1

SNYDER, CHERYL ID: N01932778 Rcd#: 0

Current Job

Position:	00116014	Job Date/Effseq:	07/31/2015	1
Department:	20010	Tax&Fin	Barg. Unit/Grade:	02 011
Job Code:	000578	TAX COMPLN	Salary:	37998.000000

Proposed Change Find | View All | First | 1 of 1 | Last

New Posn

*Eff Date/Seq #: 07/31/2015 2

*Action/Reason: Posn Chg CHL Chg Line

Position #: 00116033 TAX COMPL

NYS Position: 00116033 TAX COMPL

Line #: 05433

Bargaining / Grade: 02 015 Position Status: Approved A

Unit

Class/Uncl: 0 Pay Basis Code: ANN

Message

ERROR: The Action POS and Reason CHL transaction that you have entered would result in changes. (24000,111)

The Action POS and Reason CHL transaction that you have entered would result in changes to other data based on the Position Number you have selected. Please correct the Position Number. (Validation B1-19)

OK

- Compare the **Current Job** fields at the top of the page with the information at the bottom of the page.
- The system knows this transaction should not change the Grade, Title or Bargaining Unit, so an error message is received.



There are system edits that check for differences in fields between the two positions, such as Bargaining Unit, Grade and Title. If these are not the same, or if there are differences in other fields, the code CHL cannot be used. The user will need to check if the Reason Code or the Line Number is incorrect.



OBJECTIVE:

- Re-enter correct position information to show a successful transaction.

Exercise 4 (continued)

Step 3. Re-enter the correct position information.

Enter the information in the bullets listed below.

- Enter the correct **Position #**, 00116052.
- The **Line #** field displays the Line Number, but the field is not editable.
- Click **Request** to request the change.

Job Requests1

SNYDER, CHERYL ID: N01932778 Rcd#: 0

Current Job

Position: 00116014 Job Date/Effseq: 07/31/2015 1
Department: 20010 Tax&Fin Barg. Unit/Grade: 02 011
Job Code: 000578 TAX COMPLN Salary: 37998.000000

Proposed Change Find | View All First 1 of 1 Last

New Posn Comments

*Eff Date/Seq #: 07/31/2015 2
*Action/Reason: Posn Chg CHL Chg Line
Position #: 00116052 TAX COMPL
NYS Position: 00116052 TAX COMPL
Line #: 05755

Request

Status: Requested
Auto Approved
*Status Dt: 08/12/2015
Status Reason:

Bargaining / Grade: 02 011 Position Status: Approved A
Unit
Class/Uncl: 0 Pay Basis Code: ANN



If the Action/Reason of Position Change-Change Line is used, once the **Position #** is entered, there will be no other editable fields. The user will only need to confirm that the Line Number has changed.



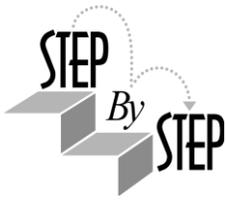
OBJECTIVE:

- Review the new field processing for a Position Change Request with a promotion.

TALKING/KEY POINTS:

- The Position Change Request is used for promotions, demotions, or reclassifications.
- Not all fields are required. If a field other than the **Position #** field is left blank, the current values will carry forward. **Position #** and **Pay Rate** are required fields.

Exercise 5: Enter a Position Change Request (Promotion)



Scenario: Cheryl Snyder has been promoted! Enter the information necessary to process this transaction.

Step 1. Navigate to the Job Action Requests page

Navigate to: *Workforce Administration > Administer Job Change Requests > Job Action Requests.*

- Click  to enter a new row. Click the **New Posn** button.
- Enter 08/10/2015 in the **Effective Date** field.
- In the **Reason** field, enter PRM (Promotion).
- Tab out of the field until additional fields appear below the **Action/Reason** fields.

Job Requests1		
SNYDER, CHERYL	ID: N01932778	Rcd#: 0
Current Job		
Position: 00116052	Job Date/Effseq: 07/31/2015 2	
Department: 20010 Tax&Fin	Barg. Unit/Grade: 02 011	
Job Code: 000578 TAX COMPLN	Salary: 37998.000000	
Proposed Change Find View All First 2 of 2 Last		
<input type="button" value="New Posn"/> <input type="button" value="+"/> <input type="button" value="-"/>		
*Eff Date/Seq #: 08/10/2015 0	Comments	Extra Serv Indicator: <input type="checkbox"/>
*Action/Reason: Posn Chg PRM Prom		Appt. Code: <input type="text"/>
Position #: <input type="text"/>		Benefit Flag: <input type="checkbox"/>
NYS Position: <input type="text"/>		Full/Part Time: <input type="checkbox"/>
Pay Rate: <input type="text"/> Line #: <input type="text"/>		Part-Time Pct: <input type="text"/>
Incr. Code: <input type="text"/>		FICA Status: <input type="text"/>
Anniversary Dt: <input type="text"/>		Work Schedule: <input type="text"/>
FIS Amount: <input type="text"/>		Tax Loc: <input type="text"/>
<input type="button" value="Request"/>		
Status: Initiated		
*Status Dt: 08/12/2015		
Status Reason: <div style="border: 1px solid gray; height: 40px;"></div>		
Bargaining / Grade:	Position Status:	
Unit		
Class/Uncl:	Pay Basis Code:	



OBJECTIVE:

- Review the data entry fields on a Position Change for a promotion.

TALKING/KEY POINTS:

- We will request this transaction to show that even though it is at the Hiring Rate, unless the correct combination is used, the transaction will not auto approve. Remind students the transaction would not be complete unless the **Save** button is clicked.
- Mention the Comments link will open the *General Comments* record.
- Stress that users can enter comments into the **Status Reason** field; however, if a permanent record of those comments is necessary, use General Comments.
- Once a position number is entered, the **pay basis code** appears by default next to the **Pay Rate**. It is not an editable field.
- Explain that you only need to change a value that is changing from the prior row. Naturally when someone is being promoted all values on the left will change (effective date, action/reason, position number, pay rate, incr. code, anniversary date and fis amount if applicable). Values on right will roll from previous row and only need to be changed if they are in fact changing.
- The **Standard Hours** field will only appear if the employee is exception hourly.

Exercise 5 (continued)

Step 2. From this page, enter the information in the bullets listed below

- Enter the new position, 00116033, Tax Comp Rep 2, in the **Position #** field.
- Tabbing out of the field will reveal new fields on the page. Some have been completed by default based on the Position Number entered.
- Add a **Pay Rate** of \$47631.00.
- Add an **Increment Code** of 1003.
- Add an **Anniversary Date** of 08/10/2015.
- Click **Request**. Do not save the transaction.

SNYDER, CHERYL		ID: N01932778	Rcd#: 0
Current Job			
Position:	00008443	Job Date/Effseq:	04/24/2014 0
Department:	01050 OGS	Barg. Unit/Grade:	02 006
Job Code:	002568 KEYBOARD S	Salary:	28299.000000
Proposed Change Find View All First 2 of 2 Last			
<input type="button" value="New Posn"/>		Comments + -	
*Eff Date/Seq #:	05/08/2014 0	Extra Serv Indicator:	<input type="checkbox"/>
*Action/Reason:	Posn Chg PRM Prom	Appt. Code:	<input type="text"/>
Position #:	00008453 PRIN STORE	Benefit Flag:	<input type="checkbox"/>
NYS Position:	00008453 PRIN STORE	Full/Part Time:	<input type="checkbox"/>
Pay Rate:	39384.00 ANN Line #: 80762	Part-Time Pct:	<input type="text"/>
Incr. Code:	1003	FICA Status:	<input type="text"/>
Anniversary Dt:	05/08/2014	Work Schedule:	NYYYYYN
FIS Amount:	<input type="text"/>	Tax Loc:	<input type="text"/>
Bargaining / Grade: 02 012		Position Status: Approved A	
Unit			
Class/Uncl: 0		Pay Basis Code: ANN	
		<input type="button" value="Request"/>	
		Status: Requested	
		*Status Dt: 05/06/2014	
		Status Reason:	
		<input type="text"/>	



Not all fields are required. If a field other than the **Position #** field is left blank, the current values will carry forward. **Position Number** and **Pay Rate** are required fields.



OBJECTIVE:

- This next section will cover Data Changes.

TALKING/KEY POINTS:

- Stress to the class that all data changes are processed through the *Job Request* pages.
- Tell the class that only the necessary fields will appear for each transaction, based on the Reason Code entered.
- Most data changes should auto-approve if entered correctly. **UNLESS THERE IS A TRANSACTION THAT HAS BEEN REQUESTED AND NOT BEEN APPROVED BY THE AUDIT SECTION.** This will prevent any additional transactions from auto approving.
- Emphasize to the class that multiple edits have been put in place to ensure correct data entry.

Data Change Requests

Introduction

Entering a Data Change Request is the process of updating an employee's job record with a variety of transactions. Examples of data changes are: updates to benefits flags, correcting employee status, increment codes, anniversary dates, and correcting history. Data Changes that do not auto-approve must be approved by OSC staff before the change can go into effect.

Objectives:

- Enter a Data Change into PayServ.
- Understand how data changes are processed in PayServ.
- Become familiar with the edits that will ensure correct input.



OBJECTIVE:

- The example is changing an employee from Full-Time to Part-Time. This will show the edits in PayServ when processing this type of transaction.

TALKING/KEY POINTS:

- Instruct the students to enter the Effective Date and Reason Code.
- The example we use will show how to change an employee from Full-Time to Part-Time.

Exercise 6: Enter a Data Change Request

Scenario: Cheryl Snyder is moving from Full-Time to Part-Time. In this exercise, you will enter the necessary information to process this data change.

Step 1. Navigate to the Job Action Requests page

Click **Data Change**. Additional fields will appear below the **Data Chg** button.

Enter the information in the bullets below:

- Enter 08/03/015 in the **Effective Date** field.
- Enter CPT (Change Percent) in the **Reason** field.
- Tab out of the **Reason** field. Additional fields will appear.

The screenshot displays the 'Job Requests1' interface for user SNYDER, CHERYL (ID: N01932778, Rcd#: 0). It shows the 'Current Job' details: Position 00116052, Department 20010, Job Code 000578, Job Date/Effseq 07/31/2015, Barg. Unit/Grade 02 011, and Salary 37998.000000. The 'Proposed Change' section includes a 'Data Chg' button, a 'Comments' field, and input fields for '*Eff Date/Seq #' (08/03/2015) and '*Action/Reason:' (Data Chg, CPT, Chg Pct). Other fields include 'Benefit Flag', 'Full/Part Time', 'Part-Time Pct', 'Work Schedule: NYYYYYN', and a 'Request' box with 'Status: Initiated' and '*Status Dt: 08/12/2015'. At the bottom, it shows 'Bargaining / Grade: 02 011', 'Position Status: Approved A', 'Unit', 'Class/Uncl: 0', and 'Pay Basis Code: ANN'.



Edits for Percentage Changes are on the *Job Requests* page but not on the *New Hire* page.



OBJECTIVE:

- Emphasize that many edits have been put in place to ensure data accuracy with regards to changing Full/Part-Time status.

TALKING/KEY POINTS:

- Remind the class not to save the transaction.
- Emphasize that many system edits have been put in place to ensure data accuracy with regards to changing Full-Time/Part-Time status. If the Reason code of CPT (Change Percent) is used, the **Full/Part** field must be P, and the **Part-Time Pct** field must be less than 1.00.
- If using the Reason Code of CPF (Change Part-Time to Full-Time), the **Full/Part** field must be F, and the **Part-Time Pct** field must be equal to 1.00.
- Work Schedule** is not required. If the field is left blank, the **Work Schedule** currently in effect will be brought forward.



OBJECTIVE:

- Review correcting errors and successfully processing a Change Percent transaction.

TALKING/KEY POINTS:

- Remind the class that the next step would be to click request and save.

Exercise 6 (continued)

Step 3. Enter the following data from this page

- Enter 0.5 in the **Part-Time Pct** field.
- Click **Request**. Notice that the **Status** field shows Requested, and the **Status Dt** field populates with today's date. Do not save this transaction.

SNYDER, CHERYL		ID: N01932778	Rcd#: 0
Current Job			
Position:	00116052	Job Date/Effseq:	07/31/2015 2
Department:	20010 Tax&Fin	Barg. Unit/Grade:	02 011
Job Code:	000578 TAX COMPLN	Salary:	37998.000000
Proposed Change Find View All First 1 of 1 Last			
Data Chg		Comments	
*Eff Date/Seq #:	08/03/2015 0		
*Action/Reason:	Data Chg CPT Chg Pct		
Benefit Flag:	<input type="checkbox"/>		
Full/Part Time:	<input type="checkbox"/> P		
Part-Time Pct:	0.5000		
Work Schedule:	NYYYYYN		
Bargaining / Grade: 02 011		Position Status:	Approved A
Unit			
Class/Uncl:	0	Pay Basis Code:	ANN
		Request	
		Status:	Requested
		Auto Approved	
		*Status Dt:	08/12/2015
		Status Reason:	



If the Reason code of CPT (Change Percent) is used, the **Full/Part-Time** field must be P, and the **Part-Time Pct** field must be less than 1.00. When using the Reason Code of CPF (Change Part-Time to Full-Time), the **Full/Part** field must be F, and the value in the **Part-Time Pct** field must be equal to 1.00.



OBJECTIVE:

- Set up the activity for entering General Comments.

TALKING/KEY POINTS:

- Cover the section objectives with the class:
 - Record Comments to an existing record.
 - Identify when General Comments are necessary.

Recording General Comments

Introduction

General Comments are used to record any relevant comments related to specific actions in PayServ. These comments may include salary or job information that is needed to further explain a transaction.

Objectives:

- Record Comments to an existing record.
- Identify when General Comments are necessary.



OBJECTIVE:

- Set up the recording General Comments activity for the participants. Have the class navigate to the *General Comments* page.

TALKING/KEY POINTS:

Launch the activity:

- In this section, participants will record General Comments for an employee.
- Students will not save during this activity.
- Use General Comments when a permanent record of a transaction is required.
- Emphasize that there is only one General Comment record per employee, regardless of how many Empl Records he or she might have.

Exercise 7: Enter General Comments



Scenario: Cheryl Snyder's reason for changing from Full-Time to Part-Time status should be recorded as part of her permanent record.

Step 1. Navigate to the General Comments page

Navigate to: *Workforce Administration > Personal Information > Biographical > General Comments (Agency)*.

This activity will be a step-by-step explanation of the process to record General Comments. Remember not to save this transaction at the end.

Enter Cheryl Snyder's Empl ID number and click **Search** to begin.

General Comments (Agency)

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

Find an Existing Value

▼ Search Criteria

Empl ID:	begins with ▼	N01932778
Name:	begins with ▼	
Last Name:	begins with ▼	
Second Last Name:	begins with ▼	
Alternate Character Name:	begins with ▼	
Middle Name:	begins with ▼	

Search Clear [Basic Search](#)  [Save Search Criteria](#)



OBJECTIVE:

- Complete the *General Comments (Agency)* page.

TALKING/KEY POINTS:

- The **Comment Sequence Number** is used to allow entry of more than one comment for a given date. The sequence number will default to the next number for the same date.
- The **Comment Category** is used to assist in identifying types of comments through queries. This also makes it easier for OSC staff to identify the audience for the comments and match the comment to the comment category.
- The **Comment Date** captures the date the comment is entered.
- Within **Comment** section begin with the date the change took effect.

Exercise 7 (continued)

Step 2. Enter the information from the bullets listed below

- The **Comments By** field should include the commenter’s full name and phone number.
- The **Comment Date** defaults to today’s date and **Sequence Nbr** defaults to the appropriate sequence number. These values can be changed if necessary.
- From the **Comment Category**, select one of the options from the dropdown menu. The field is used to categorize the comment.
- Enter a valid **Department ID**.
- In the **Comment** field, enter the text of the comment. Include the effective date of the Row your comment refers to.

SNYDER, CHERYL Person ID: N01932778

General Comments Find | View All | First 1 of 1 Last

Comments By: + -

Comment Date: 05/06/2014 **Sequence Nbr:** 0 ***Comment Category:** Job Req/Ap ▾

Department: Office of General Services

Comment:

05/08/2014 Employee moved from full time to part time

Fields and Field Definitions

Field	Definition
Sequence Nbr	Used to distinguish multiple rows of data recorded with the same effective date for a specific employee.
Comment Category	Used to relate the comment to the relevant page or transaction type.



OBJECTIVE:

- Review the Chapter Key Points with the class.

TALKING/KEY POINTS:

- Pay Rate Change Requests must be entered for new hires, rehires, and concurrent hires, as well as other pay changes.
- All Data Changes must be entered in PayServ using the *Job Requests* pages.
- The majority of Data Changes will be auto-approved if the data entered is correct and if the proper dates are used.
- Multiple edits are in place when using the *Job Requests* pages. If the user enters incomplete or incorrect data, the system will issue a series of warning and error messages.
- Transfer Requests are submitted using the Transfer Request option. Transfers require the same information as Position Changes, but the user will not see the current Job information in the display on top of the Request. The difference between a Position Change and a Transfer is the fact that the Department ID is changing.

Chapter Key Points

- Pay Rate Change Requests must be entered for new hires, rehires, and concurrent hires.
- All Data Changes must be entered in PayServ using the *Job Requests* pages.
- The majority of Data Changes will be auto-approved if the data entered is correct and if the proper dates are used.
- Multiple edits are in place to reduce errors when using the *Job Requests* pages. If the user enters incomplete or incorrect data, the system will issue a series of warning and error messages, providing opportunities to correct any errors.
- Transfer Requests are submitted using the Transfer Request option. Transfers require the same information as position changes, but the user will not see the current Job information in the display on top of the *Job Requests* page. In a Transfer, unlike a Position Change, the Department ID will change.



OBJECTIVE:

- Have the students complete the questions on Page 3-23 of their manual.



Answers:

1. PS Query - Refer to Chapter 1 page 20.
2. National ID is the employee Social Security number. Emplid ID is a system generated number. Employee History Information Summary and Statewide Job Summary. Refer to chapter 2 page 3.
3. Effective Date, Line #, if hourly to exception hourly or vise versa, and pool id.
Note: Reason code defaults to Z12 (updated by agency). Refer to chapter 1 page 14.
4. The three actions are Pay Change, New Position, and Data Change. Refer to chapter 3.
5. Must click **Request** then **Save** for any transaction.
Note: Some agencies review work prior to it being requested (one person enters and saves a transaction, and someone else reviews, requests and saves it.)

OSC will not see the transaction until it has been requested and saved. Refer to chapter 3.
6. General Comments. Refer to chapter 3 page 20.

Summary and Review



Answer the following questions:

1. What tool is used to ask questions of the system such as who, how much, how often, when?
2. What is the difference between an employee's National ID and Empl ID? Name one page where you must enter the employee's National ID in order to access employee information.
3. What fields are available for agencies to update on Position Data?
4. Which three Job Actions are processed using the *Job Action Request* page?
5. What are the two final steps necessary when using the *Job Action Request* page for any transaction?
6. Where is something entered that explains why a transaction was submitted?



Last page of this chapter.

Does anyone have any questions?

Instructor Notes