


Periodic Increment and Longevity Increase Projection Report-Display Missed PID/Longevity










- Purpose** Use this procedure to identify employees who were not updated or on an incorrect schedule for periodic increment and longevity increases.
- Trigger** Perform this procedure to identify employees who should have received a periodic increment or longevity increase or may be on an incorrect schedule to receive a periodic increment or longevity increase due to *Basic Pay Infotype (0008)* entries.
- Prerequisites**
- Day one of payroll processing has been completed.
 - Employee is indirectly valued and not assigned to a pay grade structure
- End User Roles** In order to perform this transaction you must be assigned at least one of the following roles:
Personnel Administration Processor, Personnel Administration Supervisor,
Personnel Administration Inquirer

Change History	
Date	Change Description
06/19/2014	Procedure created

Transaction Code ZHR_RPTPA803

Helpful Hints	 Report Results will display the most current record for an employee during the selected time period. Run on the morning of Day 2 of payroll processing to ensure all the updates needed for the current payroll processing period are entered. When filtering report results on a text column you must add a * at the end of your filter. You do not have to enter the entire word. Example: Enter Long* to filter the Pay Adjust Reason on longevity. For rules regarding eligibility refer to the Civil Service Rules or the Collective Bargaining Agreements. If the report times out, run the report in the background. See Running Reports in the Background for more information.
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. Start the transaction using the transaction code ZHR_RPTPA803

Periodic Increment and Longevity Increase Projection Report

Further selections Search helps Sort order Org. structure

Period

☒ Today
 ☐ Current month
 ☐ Current year
 ☐ Up to today
 ☐ From today
 ☐ Other period

Period To

Selection

Personnel Number
 Employment status 0
 Organization key
 Business area
 Work contract
 Organizational unit
 Position
 Job

Additional data

Planned compensation type T
 Pay scale type to
 Pay Scale Area to
 Pay scale group to
 Pay scale level to
☐ Display missed PID / Longevity

Data Format

Layout

2. In the **Period** section, select the desired time period for the report results:


R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Other Period	R	Enter the dates of the current payroll processing period. Example: 07/01/2014 to 07/15/2014

Period







☐ Today
 ☐ Current month
 ☐ Current year

☐ Up to today
 ☐ From today


☒ Other period









Period To 

3. In the **Selection** section, complete the following fields, as needed, to limit the amount of data displayed in the report results:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel Number	C	The employee's unique identifying number. Example: 40000235
Employment status	C	Describes the employee's status with the agency.  The Default excludes Withdrawn status. Example: 3 (Active)
Organization key	C	The pay distribution location. Example: 4000
Business area	C	A specific agency in the State of Washington. This is associated with each Employer Identification Number (EIN).  Click the  (Matchcode) to open the selection list. Example: 1790 (Department of Enterprise Services)
Work contract	C	The employee's appointment status. Example: Trial Service
Organizational unit	C	Departments, regions, divisions, units or other groupings within an Agency.  Click the  (Matchcode) to open the selection list. Search by Structure Search to view your entire agency's organizational structure. Be sure to select all your applicable organizational units. Example: 30000606
Position	C	This is a system-assigned number given to a particular position.  Position system-assigned numbers begin with a 7. Example: 71000001

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Job	C	<p>This is a system-assigned number given to a particular job class.</p> <p> Job class system-assigned numbers begin with a 5.</p> <p>Example: 51000001</p>
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Selection		
Personnel Number	<input type="text"/>	
Employment status	<input type="text" value="0"/>	
Organization key	<input type="text"/>	
Business area	<input type="text" value="1790"/>	
Work contract	<input type="text"/>	
Organizational unit	<input type="text"/>	
Position	<input type="text"/>	
Job	<input type="text"/>	



To add additional fields to the **Selection** screen, click

Further selections

Choose Selection Fields	
Selection options	Selection fields
<input type="checkbox"/> Selection options	<input type="checkbox"/> Selection fields R..
<input type="checkbox"/> Company Code	<input type="checkbox"/> Personnel Number
<input type="checkbox"/> Personnel area	<input checked="" type="checkbox"/> Employment status
<input type="checkbox"/> Personnel subarea	<input type="checkbox"/> Organization key
<input type="checkbox"/> Employee group	<input checked="" type="checkbox"/> Business area
<input type="checkbox"/> Employee subgroup	<input type="checkbox"/> Work contract
<input type="checkbox"/> Payroll area	<input type="checkbox"/> Organizational unit
<input type="checkbox"/> Administrator group	<input type="checkbox"/> Position
<input type="checkbox"/> Payroll administrator	<input type="checkbox"/> Job
<input type="checkbox"/> Personnel administrator	
<input type="checkbox"/> Time recording administrator	
<input type="checkbox"/> Pers.area/subarea/cost center	

Selection: 8



The more filtering you use on the report selection screen, the longer it will take to run.

4. In **Additional data** complete the following fields:

Additional data

Planned compensation type	<input type="text" value="T"/>		
Pay scale type	<input type="text"/>	to	<input type="text"/>
Pay Scale Area	<input type="text"/>	to	<input type="text"/>
Pay scale group	<input type="text"/>	to	<input type="text"/>
Pay scale level	<input type="text"/>	to	<input type="text"/>
<input type="checkbox"/> Display missed PID / Longevity			

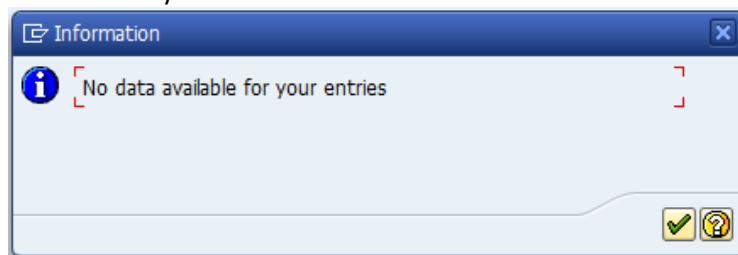
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Display missed PID/Longevity	R	<p>Check this box to display missed PID/Longevity. This displays employees who missed their automated PID/Longevity increase during the time period selected.</p> <p>Example:</p> <p>If the current payroll processing period is July 1 – 15, and the report was run after Day 1 on July 17, for the period July 1-15, the report will display employees who missed PIDS up to July 15.</p>

Additional data

Planned compensation type	<input type="text" value="T"/>		
Pay scale type	<input type="text"/>	to	<input type="text"/>
Pay Scale Area	<input type="text"/>	to	<input type="text"/>
Pay scale group	<input type="text"/>	to	<input type="text"/>
Pay scale level	<input type="text"/>	to	<input type="text"/>
<input checked="" type="checkbox"/> Display missed PID / Longevity			

5. Click (Execute) to generate the report.

5A. If there are no report results found, a pop box will display with message, "No data available for your entries."



5B. Click the green check to return to the selection screen.

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6. The following screen shot displays the default layout of the report if report results are found.

The default layout includes:

Bus Area Code, Bus Area, Pers Area Code, Pers Area, Pers Subarea Code, Pers Subarea, Org Unit, Org Unit Abbr, Org Key, Personnel Id, Employee Name, Current PS Type Code, Current PS Type, Current PS Area Code, Current PS Area, Current PS Group, Current PS Lvl, Current PS Lvl Start Date, Current PS Lvl End Date, Pay Adjust Reason, Years, New PS Group, New PS Lvl, New PS Lvl Start Date, New PS Lvl End Date, Job, Job Key/Class, Position, Count

Screen shot 1 of 3

List Edit Goto Views Settings System Help								
Periodic Increment and Longevity Increase Projection Report								
State of Washington - HRMS PID and Longevity Increase Projection Report								
Report ID : ZHR_RPTPA803 User : KELLYW Run Date : 06/19/2014 Period : 07/01/2014 through 07/15/2014 Records reported: 131 Run time: 13:21:09								
Bus Area Code	Bus Area	Pers Area Code	Pers Area	Pers Subarea Code	Pers Subarea	Org Unit	Org Unit Abbr	Org Key
1790	Dept of Enterprise Services	1790	Dept of Enterprise Services	0001	Non Represented	ASSET MANAGEMENT	ASSET MGMT	4000
1790	Dept of Enterprise Services	1790	Dept of Enterprise Services	0001	Non Represented	ASSET MANAGEMENT	ASSET MGMT	4000

Screen shot 2 of 3

Periodic Increment and Longevity Increase Projection Report								
State of Washington - HRMS PID and Longevity Increase Projection Report								
Report ID : ZHR_RPTPA803 User : KELLYW Run Date : 06/19/2014 Period : 07/01/2014 through 07/15/2014 Records reported: 131 Run time: 13:21:09								
Personnel...	Employee Name	Current PS Ty Code	Current PS Ty	Current PS Area Code	Current PS Area	Current PS Group	Current PS Lvl	Current PS Lvl Start Date
40000622	stack test kw	00	Non-Represented	01	Standard Progression	37	A	09/01/2012
40000623	quick hire	00	Non-Represented	01	Standard Progression	37	A	09/01/2012

Screen shot 3 of 3

Periodic Increment and Longevity Increase Projection Report								
State of Washington - HRMS PID and Longevity Increase Projection Report								
Report ID : ZHR_RPTPA803 User : KELLYW Run Date : 06/19/2014 Period : 07/01/2014 through 07/15/2014 Records reported: 131 Run time: 13:21:09								
Current PS Lvl End Date	Pay Adjust Reason	Ya...	New PS Gro...	New PS Lvl	New PS Lvl Start D...	New PS Lvl End Date	Job	Count
08/31/2013	Initial Appointment	1.87	37	C	09/01/2013	12/31/9999	COMMODITY CODE CLASSIFIER	1
08/31/2013	Initial Appointment	1.87	37	C	09/01/2013	12/31/9999	COMMODITY CODE CLASSIFIER	1



Click on the (Change Layout) to display additional fields:

Org Unit Code, Job code, Position Code, Position Short Text, EE Group Code, EE Group Text, Work Contract Code, Work Contract, Contract Type, Employment Status, Workforce Indicator Code, Workforce Indicator, Part-Time Indicator, Duty Station County Code, Duty Station County.

10. Review the Basic Pay Infotype (0008) of employees displayed on the report to determine when their periodic increment and longevity increase should have occurred.
11. You have completed this transaction.

Results

You have successfully generated the *PID and Longevity Increase Projection Report* for employees who missed a PID/Longevity increase.

Example Scenarios:

Below are a few examples of what may display on the report. It is not a comprehensive list of every scenario.

Example 1:

- This is an example of an incorrect Next Increase override date.
- The report results indicate that this employee should have moved to Step M effective 11/16/2013.

Current PS Group	Current PS Lvl	Current PS Lvl Start Date	Current PS Lvl End Date	Pay Adjust Reason	Years	New PS Group	New PS Lvl	New PS Lvl Start Date
70	L	10/1/2008	11/15/2013	Appointment Change	5.66	70	M	11/16/2013

- An overview of the employee's Basic Pay Infotype confirms the employee has been at 70 L since 10/1/2008.
- To determine the issue, open the Basic Pay Infotype record.

Choose 01/01/1800 to 12/31/9999 STy.

STy	Start Date	End Date	T..	P...	PS group	Lv	Amount	Curr...	Annual salary	Curr...
0	11/16/2013	12/31/9999	00	01	70	L	3,629.00	USD	87,096.00	USD
0	07/01/2013	11/15/2013	00	01	70	L	3,629.00	USD	87,096.00	USD
0	10/01/2008	06/30/2013	00	01	70	L	3,629.00	USD	87,096.00	USD
0	11/16/2007	09/30/2008	00	01	70	K	3,541.00	USD	84,984.00	USD

- The most recent Basic Pay Infotype record has a start date of 11/16/2013 as well as a Next

Increase date of 11/16/2013. This appears to be a typo.

Start 11/16/2013 to 12/31/9999 Chng 12/03/2013 00470918

Subtype 0 Basic contract

Pay scale

Reason	<u>20</u>	Appointment Change	Cap.util.M	<u>100.00</u>
PS type	<u>00</u>	Non-Represented	WkHrs/period	<u>87.00</u> Semi-monthly
PS Area	<u>01</u>	Standard Progression	Next inc.	<u>11/16/2013</u>
PS group	<u>70</u>	Level <u>I</u>	Ann.salary	<u>87,096.00</u> USD

W...	Wage Type Long Text	O.	Amount	Curr...	I...	A..	Number/Unit	Unit
1003	Pay Period Salary		3,629.00	USD	I	<input checked="" type="checkbox"/>	0.00	

IV 05/22/2014 12/31/9999 3,629.00 USD

- In this situation, the agency should either:
 - remove the next increase date so the employee will auto process to step M on 10/1/2014, or
 - enter an override date in the next increase date field for the actual date the employee is eligible to progress to step M.

Example 2:

- This is an example of the report displaying data for an employee because the employee was previously in the same salary range.
- The report displays the employee has been in PS Group 31 Level C since 7/22/2008 even though the employee just received a PID on 04/16/2014.

Current PS Group	Current PS Lvl	Current PS Lvl Start Date	Current PS Lvl End Date	Pay Adjust Reason	Years	New PS Group	New PS Lvl	New PS Lvl Start Date
31	C	7/22/2008	7/21/2009	Periodic Increment	5.85	31	E	7/22/2009

- Background on the employee:
 - Rehired on 10/16/2013,
 - Established PID is 4/16.
- The 10/16/2013 record had a Next Increase override date of 4/16/2014 and the system correctly advanced the employee to 31 C.

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Choose 01/01/1800 to 12/31/9999 STy.

STy	Start Date	End Date	T..	P...	PS group	Lv	Amount	Curr...	Annual salary	Curr..
0	04/16/2014	12/31/9999	00	01	31	C	1,133.00	USD	27,192.00	USD
0	10/16/2013	04/15/2014	00	01	31	A	1,080.50	USD	25,932.00	USD
0	07/22/2011	10/15/2013	00	01	35	I	1,427.50	USD	34,260.00	USD
0	07/01/2011	07/21/2011	00	01	35	G	1,321.00	USD	31,704.00	USD
0	07/22/2010	06/30/2011	00	01	32	H	1,299.00	USD	31,176.00	USD
0	07/01/2010	07/21/2010	00	01	32	F	1,241.00	USD	29,784.00	USD

- The Basic Pay Infotype overview also displays that the employee was at 31 C on 7/22/2008 and went to 31 E on 7/22/2009.
- Since the employee was previously at 31 C on 7/22/2008, the system will not automatically advance them to 31 E under the assumption the employee advanced to 31 E on 7/22/2009.

STy	Start Date	End Date	T..	P...	PS group	Lv	Amount	Curr...	Annual salary	Curr..
0	04/16/2014	12/31/9999	00	01	31	C	1,133.00	USD	27,192.00	USD
0	10/16/2013	04/15/2014	00	01	31	A	1,080.50	USD	25,932.00	USD
0	07/22/2011	10/15/2013	00	01	35	I	1,427.50	USD	34,260.00	USD
0	07/01/2011	07/21/2011	00	01	35	G	1,321.00	USD	31,704.00	USD
0	07/22/2010	06/30/2011	00	01	32	H	1,299.00	USD	31,176.00	USD
0	07/01/2010	07/21/2010	00	01	32	F	1,241.00	USD	29,784.00	USD
0	07/22/2009	06/30/2010	00	01	31	E	1,185.00	USD	28,440.00	USD
0	07/22/2008	07/21/2009	00	01	31	C	1,133.00	USD	27,192.00	USD
0	04/01/2008	07/21/2008	00	01	31	A	1,059.50	USD	25,428.00	USD
0	01/16/2008	03/31/2008	00	01	28	A	988.00	USD	23,712.00	USD

- In this situation, the agency should enter an override date of 4/16/2015 in the Next Increase field on the employee's Basic Pay Infotype so the employee will receive their PID the following year.
- Once the override date is added to HRMS, the employee will not show up on the Display missed PID report.

Title: Periodic Increment and Longevity Increase Projection Report-Display Missed PID/Longevity

STy	Start Date	End Date	T..	P...	PS group	Lv	Amount	Curr...	Annual salary	Curr...
0	04/16/2014	12/31/9999	00	01	31	C	1,133.00	USD	27,192.00	USD
0	10/16/2013	04/15/2014	00	01	31	A	1,080.50	USD	25,932.00	USD
0	07/22/2011	10/15/2013	00	01	35	I	1,427.50	USD	34,260.00	USD
0	07/01/2011	07/21/2011	00	01	35	G	1,321.00	USD	31,704.00	USD
0	07/22/2010	06/30/2011	00	01	32	H	1,299.00	USD	31,176.00	USD
0	07/01/2010	07/21/2010	00	01	32	F	1,241.00	USD	29,784.00	USD
0	07/22/2009	06/30/2010	00	01	31	E	1,185.00	USD	28,440.00	USD
0	07/22/2008	07/21/2009	00	01	31	C	1,133.00	USD	27,192.00	USD
0	04/01/2008	07/21/2008	00	01	31	A	1,059.50	USD	25,428.00	USD
0	01/16/2008	03/31/2008	00	01	28	A	988.00	USD	23,712.00	USD

Example 3:

- This is an example of an employee missing an override date prior to April 24, 2014.

- The report indicates this employee should have gone to Step P effective 2/21/2014.

de	Current PS Group	Current PS Lvl	Current PS Lvl Start Date	Current PS Lvl End Date	Pay Adjust Reason	Years	New PS Group	New PS Lvl	New PS Lvl Start Date	New PS
	54N1	0	2/21/2013	2/20/2014	Periodic Increment	1.27	54N1	P	2/21/2014	

- In looking at the Basic Pay Infotype Overview, you will see the employee has a record dated 2/21/2013.

Choose 01/01/1800 to 12/31/9999 STy.

STy	Start Date	End Date	T..	P...	PS group	Lv	Amount	Curr...	Annual salary	Curr...
0	02/21/2013	12/31/9999	05	03	54N1	O	32.33	USD	67,505.00	USD
0	12/01/2011	02/20/2013	05	03	54N	N	31.53	USD	65,835.00	USD
0	09/01/2009	11/30/2011	05	03	54N1	N	31.53	USD	65,835.00	USD
0	07/01/2007	08/31/2009	05	03	54N1	M	30.76	USD	64,227.00	USD
0	09/01/2006	06/30/2007	05	03	47N1	M	24.59	USD	51,344.00	USD
0	06/01/2006	08/31/2006	05	03	47N1	L	23.98	USD	50,070.00	USD

- Open the 2/21/2013 record detail to see the employee did not have a next increase date entered.
- Since this record was *prior to* the automation, there should have been a date entered in the Next Increase field to trigger the advance to Level P.

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Start 02/21/2013 to 12/31/9999 Chng 04/29/2014

Subtype 0 Basic contract

Pay scale

Reason	01	Periodic Increment	Cap.util.lvl	100.00
PS type	05	SEIU 1199NW	WkHrs/period	87.00 Semi-monthly
PS Area	03	Nurses	Next inc.	
PS group	54N1	Level 0	Ann.salary	87,505.00 USD

W...	Wage Type Long Text	O.	Amount	Curr...	I...	A...	Number/Unit	Unit
1001	Base Rate / Hourly Wage		32.33	USD	I	✓	0.00	

IV 05/23/2014 12/31/9999 32.33 USD

- In this situation, the agency will need to review the Basic Pay Infotype records and either:
 - create a Basic Pay Infotype record on the date the employee was eligible to move to the next level, or
 - enter an override date if the employee is eligible to move to the next level in the future.

Comments

This report may be exported to another application, such as Excel, for additional analysis.