Periodic Increment and Longevity Increase Historical Report

Purpose	Use this report to view PID or longevity activity during a specified period of time.
Trigger	Need a list or count of employees who received a periodic increment or longevity increase during a specified period of time.
Prerequisites	• A Basic Pay (0008) infotype must exist for the employee with the Basic Pay infotype reason code of 01- Periodic Increment or 26- Longevity unless the defaults for the Pay Adjust Reasons are removed.
	• An employee was eligible for a PID or Longevity increase during the specified time period.
	• Employee must be indirectly valued during the specified time period.
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**
06/24/14	Procedure created
09/15/2014	Updates to procedure per OFM review

Transaction Code   ZHR_RPTPA804

Helpful Hints	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: Filtering on Pay Adjust Reason for longevity, you can enter **Long***
	This report will display the first record of consecutive records where the pay adjust reason is either Longevity or Periodic Increment and the PS Type, PS Area, PS Group, PS Level has not changed from the previous record.
	Example: Employee received a PID on 9/1/2012. User copied the 9/1/2012 record to add the next increase date of 9/1/2013 and changed the effective Start date to 12/1/2012 but left the pay adjust reason code 01- Periodic Increment.
	The 9/1/2012 record would display on the report and the 12/1/2012 record would not be included since there was no change to the employee's PS Type, PS Group, PS Level on 12/1/2012.
	For rules regarding eligibility refer to the Civil Service Rules or Collective Bargaining Agreements.

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_RPTPA804

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
Today	C	This selection option will display the **periodic increment or longevity increase** records effective on today' date.
Current Month	C	This selection option will display the **periodic increment or longevity increase** records that were effective in the current month.
Current Year	C	This selection option will display the **periodic increment or longevity increase** records that were effective in the current

		year.
Up to today	C	This selection option will display the **periodic increment or longevity increase records** that were effective from HRMS implementation up to today.
From today	C	This selection option will display the **periodic increment or longevity increase** records are effective today **or in the future**.
Other Period	C	This selection allows you to specify specific dates and will display the **periodic increment or longevity increase records** effective during the date range.
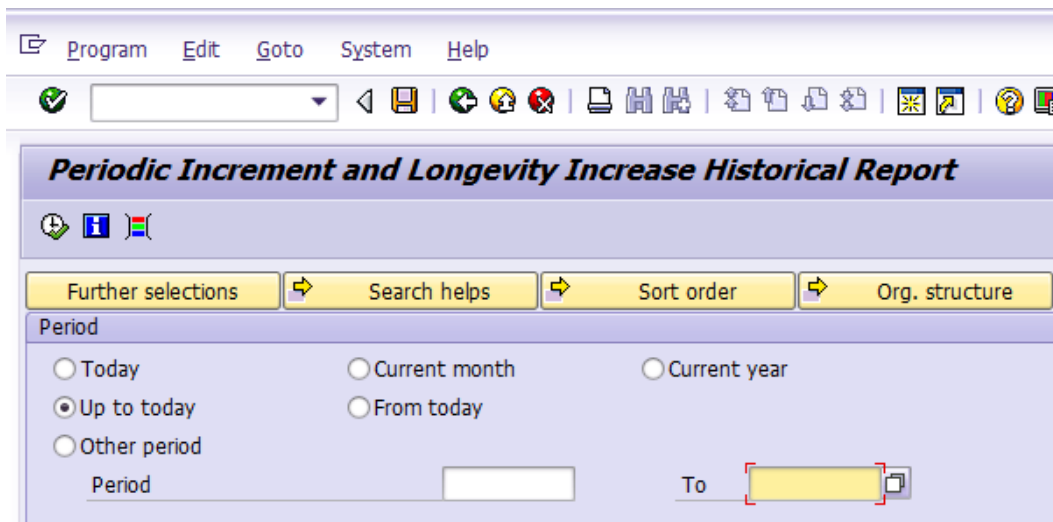
3. In the *Selection* section, complete the following fields, as needed, to limit the amount of data displayed in the report results:

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).

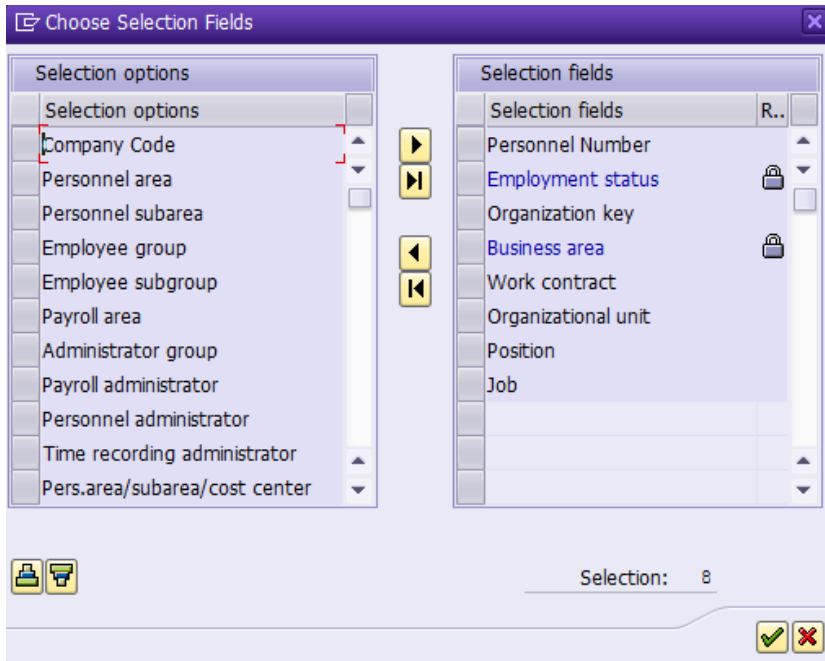|		
		Click the (Matchcode) to open the selection list. **Example:** 1790 (Department of Enterprise Services)
Work contract	C	The employee's appointment status. **Example:** Trial Service
Organizational unit	C	Departments, regions, divisions, units or other groupings within an Agency. Click the (Matchcode) 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
Job	C	This is a system-assigned number given to a particular job class. Job class system-assigned numbers begin with a 5. **Example:** 51000001

 To add additional fields to the **Selection** sreen, click the Further selections .

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, if necessary, to further restrict report results:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Planned compensation type	C	Identifies which type of planned compensation is used. ⚠️**Leave the Default of T** **Example:** T
Pay scale type	C	This represents the State of Washington's compensation (salary bands, hour based step increases, and bargaining units). **Example:** 00- Non-Represented
Pay Scale Area	C	This identifies a collection of pay ranges, steps, and rates that comprise a pay schedule based on Washington state rules.

		Example: 01- Standard Progression
Pay scale group	C	A range or band.
		Example: 62
Pay scale level	C	The Pay Scale Level is the step within a range for compensation.
		Example: L
Pay Adjust Reason	C	The reason the Basic Pay Infotype 0008 was updated. This report defaults in 01- Periodic Increment and 26- Longevity.
		⚠ Removing the default Pay Adjust Reason restrictions will result in displaying ALL Pay Adjust Reasons for the selected time period.

Additional data

Planned compensation type	I		⇨
Pay scale type		to	⇨
Pay Scale Area		to	⇨
Pay scale group		to	⇨
Pay scale level		to	⇨
Pay Adjust Reason	01		⇨

Data Format

Layout	

5.   Click 🔄 (Execute) to generate the report.

ℹ️ The following screen shots display the default layout which 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, Start Date, End Date, Pay Adjust Reason, PS Ty Code, Ps Ty, PS Area Code, PS Area, PS Group, PS Lvl, Job, Job Key/Class, Position, PS Change, Count.

Screen shot 1 of 2

Screen shot 2 of 2

The PS Change indicator helps identify whether an employee's Pay Scale information changed from the previous record.

Click on the [icon] (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.

Results
You have successfully generated the *PID and Longevity Increase Historical Report.*

Comments