

**Periodic Increment and Longevity Increase Projection Report**

**Purpose** This report displays current Pay Scale data and projects new Pay Scale data for periodic increment and longevity increases for employees and may also be used to identify employees who did not process or are on an incorrect schedule for periodic increment and longevity increases.

This is a ***projections*** and missed PID/Longevity increase report only. To display historical PID/Longevity increases, use the [Periodic Increment and Longevity Increase Historical Report](#).

**Trigger** Perform this procedure to identify employees who will receive a periodic increment or longevity increase in a current or future period.

**Or**


Perform this procedure after day one of payroll processing to identify employees who should have received a periodic increment or longevity increase and/or may be on an incorrect schedule to receive a periodic increment or longevity increase due to *Basic Pay Infotype (0008)* entries.

- Prerequisites**
- A Basic Pay (0008) infotype must exist for the employee
  - 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
10/17/2014	Clarified functionality of Period selection with Display missed PID / Longevity option










**Transaction Code** ZHR\_RPTPA803

<b>Helpful Hints</b>	 Report Results will display the most current record for an employee during the selected time period.  To identify missed PID / Longevity increases, 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 <b>must</b> add a * at the end of your
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	<p>filter. You do not have to enter the entire word.</p> <p><b>Example:</b> Enter <b>Long*</b> to filter the Pay Adjust Reason on longevity.</p> <p>For rules regarding eligibility of periodic increment or longevity increases refer to the Civil Service Rules or the Collective Bargaining Agreements.</p> <p>If the report times out, run the report in the background. See <a href="#">Running Reports in the Background for more information.</a></p>
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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
<b>Error</b> 	<b>Example:</b>  Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.
<b>Warning</b> 	<b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.



**Procedure**

1. Start the transaction using the transaction code ZHR\_RPTPA803

2. In the **Period** section, select the desired time period for the report results; results will vary depending on whether or not the “Display missed PID / Longevity” option is selected:

Field Name	R/O/C	Description: <b>without</b> the Display missed PID/Longevity selected*	Description: <b>with</b> the Display missed PID/Longevity selected
		<b><i>Intended for Projections only</i></b>	<b><i>Intended for missed PID/Longevity increases only</i></b>
Today	C	Displays projected PID/Longevity increases with a <b>New PS Lvl Start Date</b> effective today.	Displays missed PID/Longevity increases <b>prior to</b> today.  <b>Tip:</b> Use this option to ensure

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			personnel changes requiring an override to the scheduled Next Increase Date are properly maintained in the system.
Current month	C	Not recommended for projected PID/Longevity increases	Displays missed PID/Longevity increases <b>prior to</b> the current month.
Current year	C	Not recommended for projected PID/Longevity increases	Displays missed PID/Longevity increases <b>prior to</b> the current year.
Up to today	C	Not recommended for projected PID/Longevity increases	Not recommended for missed PID/Longevity increases
From today	C	Displays projected PID/Longevity increases with a <b>New PS Lvl Start Date</b> effective today and in the future.	Displays missed PID/Longevity increases <b>prior to</b> today.   <b>Tip:</b> Use this option to ensure personnel changes requiring an override to the scheduled Next Increase Date are properly maintained in the system.
Other period	C	Displays projected PID/Longevity increases for a specific period.	Displays missed PID/Longevity increases <b>prior to</b> the period dates.   <b>Tip:</b> Use this option on Day 2 of payroll processing to find errors in the current payroll processing period.  <b>Example:</b> Enter 10/16/2014 (for payroll processing period 10/1/2014 to 10/15/2014) on 10/17/2014 (Day 2).

\*When selecting time periods without the “Display missed PID/Longevity” indicator, results may include employees who withdrew in the selected time period, even if withdrawn employees were excluded from the Selection options. This is because the employees were *projected* to receive an increase but left prior to receiving it. To exclude withdrawn employees from the report results, either add Employment Status to the default layout and filter to exclude withdrawn or filter the Position to exclude positions = “99999999” (withdrawn). (See [Step 6.](#)) The list may also include employees who were projected to receive an increase but did not receive it.



**Tip:** The projections report will only project the next scheduled increase. It will not project

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multiple future increases.

**Example:** An employee with a projected **New PS Lvl Start Date** of 11/16/2014 would not display in the results for 11/16/2015 – 11/30/2015 until after the 11/16/2014 increase processes.




Do not use this report to view PID / Longevity increases that processed in prior periods. Use the [Periodic Increment and Longevity Increase Historical Report](#) instead.









- 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. <b>Example:</b> 40000235
Employment status	C	Describes the employee's status with the agency.  The Default excludes Withdrawn status. <b>Example:</b> 3 (Active)
Organization key	C	The pay distribution location. <b>Example:</b> 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. <b>Example:</b> 1790 (Department of Enterprise Services)
Work contract	C	The employee's appointment status. <b>Example:</b> 03 (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. <b>Example:</b> 30000606
Position	C	This is a system-assigned number given to a particular position.  Position system-assigned numbers begin with a 7.

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		<b>Example:</b> 71000001
Job	C	This is a system-assigned number given to a particular job class.  Job class system-assigned numbers begin with a 5. <b>Example:</b> 51000001

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

<p>Selection options</p> <ul style="list-style-type: none"> <li>Selection options</li> <li>Company Code</li> <li>Personnel area</li> <li>Personnel subarea</li> <li>Employee group</li> <li>Employee subgroup</li> <li>Payroll area</li> <li>Administrator group</li> <li>Payroll administrator</li> <li>Personnel administrator</li> <li>Time recording administrator</li> <li>Pers.area/subarea/cost center</li> </ul>	<p>Selection fields</p> <ul style="list-style-type: none"> <li>Personnel Number</li> <li>Employment status</li> <li>Organization key</li> <li>Business area</li> <li>Work contract</li> <li>Organizational unit</li> <li>Position</li> <li>Job</li> </ul>
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Selection: 8




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

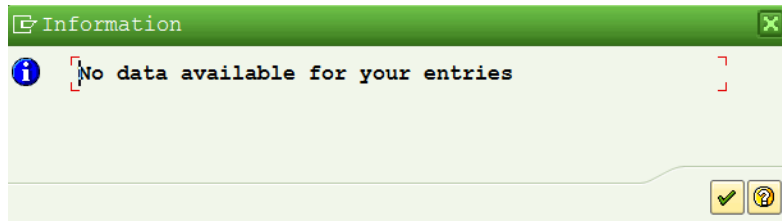
- In **Additional data** complete the following fields:

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R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Display missed PID/Longevity	C	Check this box to display missed PID/Longevity. This displays employees who missed their automated PID/Longevity increase during the time period selected. (See <a href="#">Step 2</a> for more information.)

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.

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



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## Screen shot 1 of 3

Periodic Increment and Longevity Increase Projection Report

State of Washington - HRMS  
PID and Longevity Increase Projection Report

Report ID : ZHR\_RPTA803  
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\_RPTA803  
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\_RPTA803  
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	Ye...	New PS Gro...	New PS Lvl	New PS Lvl Start D...	New PS Lvl End Date	Job	Job Key/Class	Position	Count
08/31/2013	Initial Appointment	1.87	37	C	09/01/2013	12/31/9999	COMMODITY CODE CLASSIFIER	17940	TESTING SS 12 POSITION/copyrecord	1
08/31/2013	Initial Appointment	1.87	37	C	09/01/2013	12/31/9999	COMMODITY CODE CLASSIFIER	17940	TESTING SS 12 POSITION/copyrecord	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

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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 <i>PID and Longevity Increase Projection Report</i> .										
Example Scenarios:										
Below are a few examples of Basic Pay coding errors that may produce questionable results on the <b>Periodic Increment and Longevity Increase Projection Report</b> . It is not a comprehensive list of every scenario.										
Example 1 – Incorrect Next Increase override date on an employee’s Basic Pay Infotype										
<ul style="list-style-type: none"> <li>The Periodic Increment and Longevity Increase Projection Report results indicate this employee should have moved to Step M effective 11/16/2013:</li> </ul>										
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		
<ul style="list-style-type: none"> <li>An overview of the employee’s Basic Pay Infotype confirms the employee has been at 70 L since 10/1/2008:</li> </ul>										
<p>Choose <input type="text" value="01/01/1800"/> to <input type="text" value="12/31/9999"/> STy. <input type="text"/></p>										
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		
<ul style="list-style-type: none"> <li>To determine the issue, open the Basic Pay Infotype record:</li> </ul>										

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Start  to  Chng  0470918

Subtype  Basic contract

Pay scale

Reason	<input type="text" value="20"/> Appointment Change	Cap.util.M	<input type="text" value="100.00"/>
PS type	<input type="text" value="00"/> Non-Represented	WkHrs/period	<input type="text" value="87.00"/> Semi-monthly
PS Area	<input type="text" value="01"/> Standard Progression	Next inc.	<input type="text" value="11/16/2013"/>
PS group	<input type="text" value="70"/> Level <input type="text" value="L"/>	Ann.salary	<input type="text" value="87,096.00"/> 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    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, with a change date of 12/03/2013. This appears to be a typo since it is unlikely the next increase date would be 11/16/2013.
- 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.

**Example 2 – Employee previously in the same salary range**

- Using the Display missed PID/Longevity indicator, the Periodic Increment and Longevity Increase Projection Report shows an employee has been in PS Group 31 Level C since 7/22/2008 even though the Basic Pay Infotype overview shows the employee 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

Choose  to  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

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- Background on the employee:
  - Rehired on 10/16/2013,
  - Established PID is 4/16.
- In the Basic Pay Infotype overview below, 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.
- The overview also displays that the employee was at 31 C on 7/22/2008 and went 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

- 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.
- 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.

**Example 3 – Employee missing an override date**

- Using the Display missed PID/Longevity indicator, the Periodic Increment and Longevity Increase Projection Report results indicate the employee in this example 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 the Basic Pay Infotype Overview below, you will see the employee has a record dated 2/21/2013:

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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	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:

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.	<input type="text"/>
PS group	54N1	Level 0	Ann.salary	67,505.00 USD

W...	Wage Type Long Text	O.	Amount	Curr...	I..	A..	Number/Unit	Unit
1001	Base Rate / Hourly Wage		32.33	USD	I	<input checked="" type="checkbox"/>	0.00	

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

- 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.
- 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.