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

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Change Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/19/2014</td>
<td>Procedure created</td>
</tr>
</tbody>
</table>

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.
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:

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Error**    | Example: ![Wrong symbol] Make an entry in all required fields.  
**Action**: Fix the problem(s) and then click ![Checkmark symbol] (Enter) to validate and proceed. |
| **Warning**  | Example: ![Warning symbol] Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.  
**Action**: If an action is required, perform the action. Otherwise, click ![Checkmark symbol] (Enter) to validate and proceed. |
| **Confirmation** | Example: ![Checkmark symbol] Save your entries.  
**Action**: 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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Period</td>
<td>R</td>
<td>Enter the dates of the current payroll processing period.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Example:</strong> 07/01/2014 to 07/15/2014</td>
</tr>
</tbody>
</table>
3. In the **Selection** section, complete the following fields, as needed, to limit the amount of data displayed in the report results:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>R/O/C</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Number</td>
<td>C</td>
<td>The employee’s unique identifying number.</td>
<td>40000235</td>
</tr>
<tr>
<td>Employment status</td>
<td>C</td>
<td>Describes the employee’s status with the agency.</td>
<td>3 (Active)</td>
</tr>
<tr>
<td>Organization key</td>
<td>C</td>
<td>The pay distribution location.</td>
<td>4000</td>
</tr>
<tr>
<td>Business area</td>
<td>C</td>
<td>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.</td>
<td>1790 (Department of Enterprise Services)</td>
</tr>
<tr>
<td>Work contract</td>
<td>C</td>
<td>The employee’s appointment status.</td>
<td>Trial Service</td>
</tr>
<tr>
<td>Organizational unit</td>
<td>C</td>
<td>Departments, regions, divisions, units or other groupings within an Agency.</td>
<td>30000606</td>
</tr>
<tr>
<td>Position</td>
<td>C</td>
<td>This is a system-assigned number given to a particular position.</td>
<td>71000001</td>
</tr>
</tbody>
</table>
This is a system-assigned number given to a particular job class.

Job class system-assigned numbers begin with a 5.

**Example:** 51000001

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

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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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display missed PID/Longevity</td>
<td>R</td>
<td>Check this box to display missed PID/Longevity. This displays employees who missed their automated PID/Longevity increase during the time period selected.</td>
</tr>
</tbody>
</table>

**Example:**

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**.

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

Screen shot 1 of 3

Screen shot 2 of 3

Screen shot 3 of 3
Click on the (Change Layout) to display additional fields:

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.

- 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.

- 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.

- 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.

- 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.
• 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.

• 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:

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