

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 | <p>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.</p> <p>Example: Filtering on Pay Adjust Reason for longevity, you can enter Long*</p> <p> 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.</p> <p>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.</p> <p>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.</p> <p>For rules regarding eligibility refer to the Civil Service Rules or Collective Bargaining Agreements.</p> |
|----------------------|--|

Title: Periodic Increment and Longevity Increase Historical Report

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_RPTA804

The screenshot displays the SAP transaction interface for 'Periodic Increment and Longevity Increase Historical Report'. The window title is 'Periodic Increment and Longevity Increase Historical Report'. The interface includes a menu bar (Program, Edit, Goto, System, Help) and a toolbar with various icons. Below the title bar, there are four buttons: 'Further selections', 'Search helps', 'Sort order', and 'Org. structure'. The main area is divided into several sections:

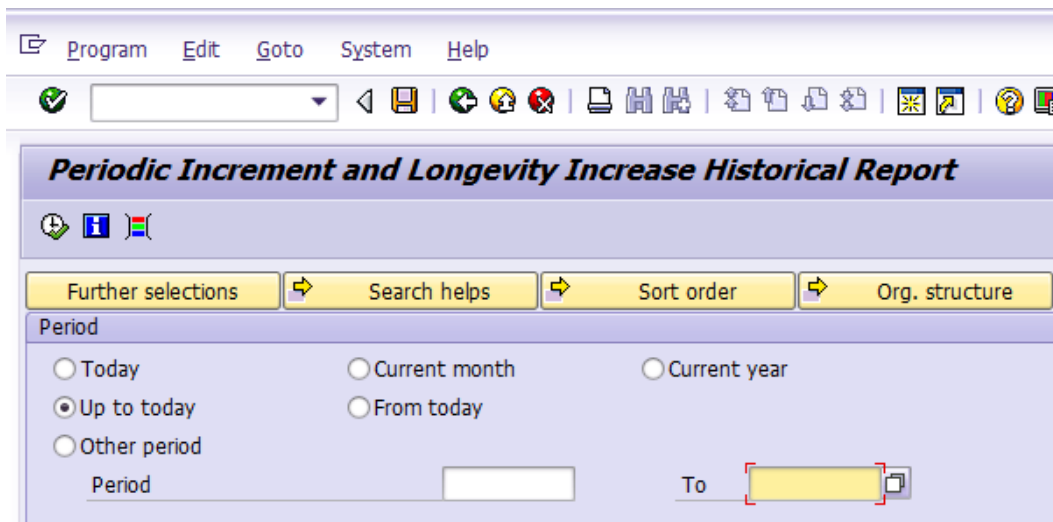
- Period:** Contains radio buttons for 'Today', 'Current month', and 'Current year'. There are also options for 'Up to today', 'From today', and 'Other period'. Below these are input fields for 'Period' and 'To'.
- Selection:** A list of criteria with input fields and selection arrows: Personnel Number, Employment status (with a value of 0), Organization key, Business area, Work contract, Organizational unit, Position, and Job.
- Additional data:** Fields for Planned compensation type (with value 'I'), Pay scale type, Pay Scale Area, Pay scale group, Pay scale level, and Pay Adjust Reason (with value '01').
- Data Format:** A 'Layout' field.

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 |

Title: Periodic Increment and Longevity Increase Historical Report







| | | |
|--------------|---|---|
| | | 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). |

Title: Periodic Increment and Longevity Increase Historical Report

| | | |
|---------------------|---|--|
| | |  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 |

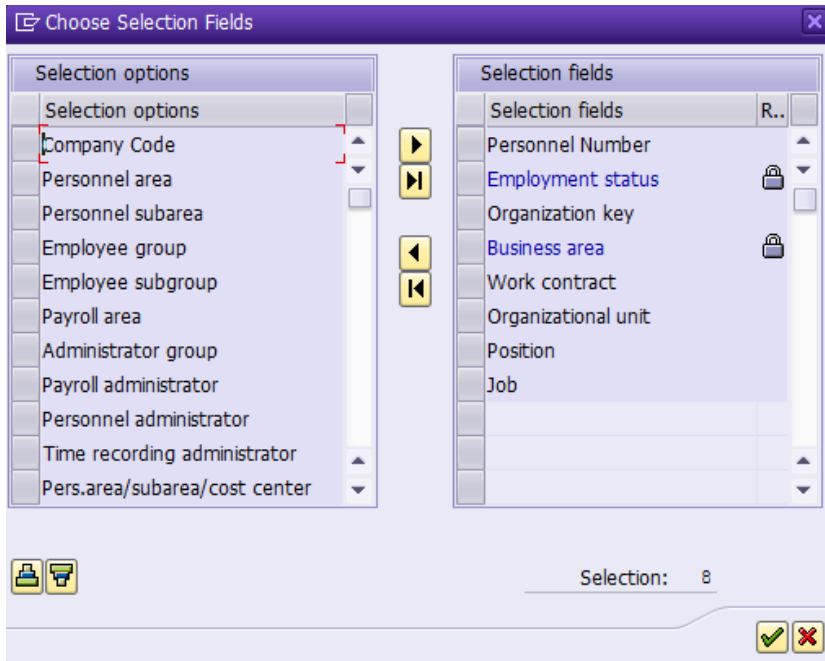
Selection

| | | |
|---------------------|--|---|
| 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 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:

| Additional data | | | |
|---------------------------|----|----|---------------|
| Planned compensation type | T | | [Right Arrow] |
| Pay scale type | | to | [Right Arrow] |
| Pay Scale Area | | to | [Right Arrow] |
| Pay scale group | | to | [Right Arrow] |
| Pay scale level | | to | [Right Arrow] |
| Pay Adjust Reason | 01 | | [Right Arrow] |







| Data Format | |
|-------------|--|
| Layout | |

| 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. |

Title: Periodic Increment and Longevity Increase Historical Report


| | | |
|-------------------|---|---|
| | | 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 | <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"/> |
| Pay Adjust Reason | <input type="text" value="01"/> |  |     |

Data Format

Layout

5. Click  (Execute) to generate the report.



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

State of Washington - HRMS
PID and Longevity Increase Historical Report

Report ID : ZHR_RPTA804
User : KELLYW
Run Date : 06/24/2014
Period : 07/01/2012 through 06/30/2014
Records reported: 1,034
Run time: 09:19:41


| Bus Area Code | Bus Area | Pers Area Code | Pers Area | Pers Subarea Code | Pers Subarea | Org Unit | Org Unit Abbr | Org Key |
|---------------|-------------------------------|----------------|-----------------------------|-------------------|-----------------|-------------------------------------|---------------|---------|
| 4610 | Department of Ecology | 4610 | Dept of Ecology | 00J2 | Agencywide | SEA-Wetlands | E30000 | 001302 |
| 1790 | Dept of Enterprise Services | 1790 | Dept of Enterprise Services | 0001 | Non Represented | CLS - ENTERPRISE CONTRACTS | CLS-CONT | GROUP 2 |
| 4770 | Department of Fish & Wildlife | 4770 | Dept of Fish & Wildlife | 00F6 | Bus & Pub Affs | DirectorsOfficeOperationsFinancaSer | DOFinancial | 1000 |



Screen shot 2 of 2

State of Washington - HRMS
PID and Longevity Increase Historical Report

Report ID : ZHR_RPTA804
User : KELLYW
Run Date : 08/07/2014
Period : 07/01/2012 through 06/30/2014
Records reported: 87
Run time: 08:25:55

| Personnel... | Employee Name | Start Date | End Date | Pay Adjust Reason | PS Ty Code | PS Ty | PS Area Code | PS Area | PS Gro... | PS Lvl | Job | Job Key/Class | Position | PS Chan... | Count |
|--------------|-----------------------------------|------------|------------|--------------------|------------|-----------------|--------------|----------------------|-----------|--------|------------|---------------|----------------------|------------|-------|
| 97524 | 97524 Production Support 00097524 | 03/19/2014 | 12/31/9999 | Longevity | 00 | Non-Represented | 01 | Standard Progression | 66 | L | | | IT SPECIALIST 5 | N | 1 |
| 390719 | HEGLUND DARLENA A | 10/01/2013 | 12/31/9999 | Longevity | 00 | Non-Represented | 01 | Standard Progression | 65 | M | FACILIT | 5421 | FACILITIES SENIOR PL | Y | 1 |
| 544314 | test test | 09/01/2013 | 12/31/9999 | Periodic Increment | 00 | Non-Represented | 01 | Standard Progression | 57 | C | UPG -1 ... | UPG -1 Job | UPG -3 Test Position | Y | 1 |

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

  (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 <i>PID and Longevity Increase Historical Report</i> . |
| Comments |
| |