



Mass Actions

Leave Category Change Mass	<p>A Mass process is run each pay period to update employees annual leave category to the increased accrual level as they become eligible. Users do not process leave category changes manually.</p> <p>The mass process evaluates the employee's Leave Service Computation Date (SCD) to determine their eligibility for leave accrual increases at 3 years and 15 years. The process compares the current pay period date to their Leave SCD to calculate the number of years. The program also determines if the employee is in the Senior Executive Service (SES) since SES employees are in a different benefit plan.</p> <p>If the employee is eligible for a leave accrual increase, the program will insert a row into the Leave Plans (Annual Leave) page updating the Effective Date, Election Date and Benefit Plan.</p>
Process Schedule	<p>The process will run on the first day of each pay period, Sunday. The Effective Date will be the first day of the current pay period. For example, an employee with a Leave SCD date of 10/22/1999 would have had a leave effective date of 11/03/2002.</p>
Process Check	<p>Users may use Mass Mask Query to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.</p> <p>Home > PeopleTools > Query Manager > Use > Query Manager</p> <p>Query Name: HE_MASS_MASK_STATUS.</p> <p>Please see Information Tools in Chapter 18 for instructions on how to use the Mass Mask Query function and reports.</p>
Temporary Employee	<p>NOTE: Annual leave categories for temporary employees are the same as permanent employees. Payroll adjusts the actual accrual of leave for each temporary employee based on the hours worked by that employee.</p>
Manual Leave Category Changes	<p>PAR Actions are not keyed for manual leave category changes. Users enter the employee's leave category change directly on the Leave Plans page.</p>
Navigational Path	<p>Home>Compensate>Employee>Administer Base Benefits>Use>Leave Plans</p>

Procedure

The following steps detail the procedure for processing manual leave category changes.

- 1 Follow the navigational path:
Home>Compensate>Employee>Administer Base Benefits>Use>Leave Plans
- 2 Enter the **Employee ID** to pull up the employee record or click on **Lookup** to perform a search for the employee by Name or other criteria.

The Leave Plans page will appear:

The screenshot shows the 'Leave Plans (USA)' page in the PEOPLE Soft system. The breadcrumb trail is 'Home > Compensate Employees > Administer Base Benefits > Use > Leave Plans'. The page displays details for employee Sullivan, Adam (ID: 0050, Empl Rcd#: 0). The 'Plan Type' is set to 'Sick'. The 'Coverage Election' section has radio buttons for 'Elect' (selected), 'Waive', and 'Terminate'. The 'Election Date' is '11/28/2001'. The 'Effective Date' is empty. The 'Benefit Plan' is empty. The 'Employee Status' is 'Active' and the 'Benefit Program' is 'Federal Govt Employees'. The 'Currency' is 'USD'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'.

- 3 Click the  to insert a new row.
- 4 Enter the **Effective Date**.
- 5 Enter the **Election Date**.
- 6 Enter the **Benefit Plan**.
- 7 Click **Save**.

Performance Ratings Mass

Users may request the automated entry of performance ratings for large groups of employees within their Agencies.

The Mass process updates appraisals of employees in the group with the same rating for the same rating period as specified by the Agency.



Employees whose ratings differ are adjusted manually.

For example, if 80 % of the Agency employees have a satisfactory rating then this process would allow you to assign a satisfactory rating to all applicable employees in your Agency, then manually modify ratings for the 20% of employee's whose rating differs from satisfactory.

NOTE: It is recommended that the Agency Mass action request specify the rating that applies to the highest percentage of employees in the group.

Rating Update Criteria

The criteria that this process uses to determine which employee ratings to update are as follows:

- The employee was hired more than 90 days ago.
- Employees are in the following pay plans: GS, GM, GN, WS, WG, WL, WN, WD, XP, XS, XL, XD, and XN.
- The employee's tenure has a value other than **NONE**.

Procedure

The Agency submits a request via an **EHRP Help POC Ticket** with the following information:

- The **Effective Date** of the rating.
- The **Performance Plan End Date** (Agency determined)
- The **Business Unit** (Agency) for which the process will be run
- The **Begin Date** of the appraisal period
- The **End Date** of the appraisal period
- The **Rating Scale** the agency employs, either **A** or **H**
- The **Rating** to be assigned to all applicable employees within the Agency

Process Check

Users may use **Mass Mask Query** to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

Home > PeopleTools > Query Manager > Use > Query Manager
Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools** in **Chapter 18** for instructions on how to use the Mass Mask Query Function and reports.

Manual Entry of Performance Ratings

NOTE: Users will need to manually modify the performance rating for employees whose rating differs from the specified rating used in the Agency Employee Performance Appraisal Mass.

Performance ratings are keyed manually on the **Employee Appraisal** page

Navigational Path **Home>Administer Workforce>Manage> Performance (USF) >Use> Employee Appraisal**

Procedure The following steps detail the procedure for processing Performance Ratings manually.

- 1 Follow the navigational path:
Home>Administer Workforce>Manage> Performance (USF) >Use> Employee Appraisal
- 2 Enter the **Employee ID** to pull up the employee record or click on **Lookup** to perform a search for the employee by Name or other criteria.

The Employee Appraisal page appears:

The screenshot shows the 'Employee Appraisal' page in the PEOPLE Soft system. The page has a blue header with the PEOPLE Soft logo and navigation links for Home and Help. Below the header is a breadcrumb trail: Home > Administer Workforce > Manage Performance (USF) > Use > Employee Appraisal. There are three tabs for 'Employee Appraisal 1', 'Employee Appraisal 2', and 'Employee Appraisal 3'. The main form area contains the following fields and values:

Wilson, Matt	Employee	ID: 0007	Empl Rcd#: 0
*Effective Date: 11/28/2001		Review Type: Supervisory Rating	
From/To Date: [] []		Next Review Date: [] []	
Performance Plan: STANDARD	OPM Rating of Record Pattern H	OPM Pattern: H	
Rating Scale: H	OPM Rating of Record Pattern H	OPM Rating:	
Review Rating: []		Position: 00000010	
Company: HE 11	Program Support Center	Supervisor: SupwMgr	
Department: PCE5		PP Grade:	
Job Code: 97H132			

At the bottom of the form, there are several buttons: Save, Return to Search, Previous tab, Next tab, Update/Display, Include History, and Correct History. The page also shows a 'View All' and 'First 1 of 1 Last' navigation bar.

- 3 Enter the effective date of the appraisal in the **Effective Date** field.
- 4 In the **From/To Date** fields, enter the period of time for which the employee is being appraised.
- 5 If known, enter the date of the next review in the **Next Review Date** field.

- 6 Select the **Rating Scale** from the dropdown menu.
- 7 Select the **Review Rating** from the dropdown menu.
- 8 Click  .

Performance Ratings and Automatic WGIs

NOTE:It is important to remember that for **Within Grade Increases (WGIs)** to process automatically, the employee must have a satisfactory rating in EHRP that is effective within 15 months of their **WGI Due Date**.

NTE Date Mass

A mass process is run in EHRP that terminates the employment of employees with not-to-exceed appointments dates within the pay period.

This process mimics the act of Users inserting termination actions into each employee's record.

This mass action terminates the employee's Health Benefits, Life AD Benefits, Savings Plans, Retirements Plans, and Direct Deposits. Users must terminate Savings Bonds manually.

Process Schedule

The NTE Date Mass is run on the last day of the pay period.

Automatic Entries

This process enters two rows of data on the **PAR** pages and one row of data on the **Separation** page as follows:

PAR Page Entries**Row 1: Data Control Page**

- **Effective Date:** NTE Date
- **Action:** TER (Termination)
- **Reason:** TMP (End of Temporary Employment)
- **NOA Code – Extension:** 355-0 (Termination Expiration of Appointment)

Row 2: Data Control Page

- **Effective Date:** NTE Date
- **Action:** DTA (Data Change)
- **Reason:** DTA (Data Change)
- **NOA Code – Extension:** 999-8 (Home Address Change – Separated Employee)

Separation Page Entries**Row 3: Separation Page**

- **Effective Date:** NTE Date
- **Type of Action:** Annuity



- **Address:** Most current address from the Personnel Data page

Process Check Users may use **Mass Mask Query** to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

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Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools** in **Chapter 18** for instructions on how to use the Mass Mask Query function and reports.

CFC Mass A mass action process will be performed to stop all CFC deductions by updating records of all employees who are contributing at the end of the year.

A **Row** will be entered into the employee's **General Deduction** page to **Stop** the CFC contribution. The payroll interface will auto generate the NOAs from the data entered on the **General Deduction** page.

The **Effective Date** and the **Deduction End Date** for the mass stop will be the pay period end date (Saturday) of the last pay period of the year

Process Schedule The CFC Mass is run on the pay period end date, Saturday, of the last pay period of the year.

Process Check Users may use **Mass Mask Query** to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

Home > PeopleTools > Query Manager > Use > Query Manager

Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools** in **Chapter 18** for instructions on how to use the Mass Mask Query function and reports.

Individual CFC Start/Stop PARs are not used to start or stop CFC deductions. Users enter individual start and stop actions on the employee **General Deduction Data** page.

Navigational Path **Home>Compensate Employees>Maintain Payroll Data (USF)>Use>General Deduction Data**

Procedure Steps for processing manual CFC start and stop actions are found in Chapter 16, General Deductions.



Correcting User CFC Errors *Errors discovered on the same day keyed:*

If a User makes a typo on a CFC action and it is discovered the same day, the user should contact their Super User. The **Super User** will utilize correct history to correct the typo. The payroll interface will then pick up the update.

Errors discovered after the date keyed:

There are three options available for rectifying errors discovered after the date keyed.

Option 1: The user may enter a **new row** with the accurate data.

NOTE: *The effective date of this new row must be more current than the previous row in the employee's health benefits record.*

Option 2: The User may request that their **Super User** delete the erroneous row first. Once the **deletion** occurs, the correct data must be re-entered. This **re-entry** will trigger the notification of the change to the payroll interface.

Option3: If the correction is on an **historic row** (not the current row), a **Super User** may **insert the row with an effective date that is less** than the current row's effective date. However, a **Help POC Ticket is required** to request the action be **resent** for payroll pickup.

PSP Mass	Each pay period a batch process will be run to stop an employee's Physician Special Pay (PSP) based on the Contract End Date entered on the Service Agreement Page.
Schedule	This process will be run on Sunday, the first day of the pay period The run date is the previous Saturday. The Effective Date of the row inserted is the contract end date.
Employee Record Entry	The mass process will insert a row into the employee's record for the stop with the following attributes: <ul style="list-style-type: none">• Effective Date: Last day of the pay period (Contract End Date)• NOA: 850• NOA Ext: F• Action: PAY• Reason: OTH• Authority: VIP



- The **PSC Earnings Code(s)** will be removed from the **Other Pay Information** page.

Process Check Users may use **Mass Mask Query** to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

Home > PeopleTools > Query Manager > Use > Query Manager

Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools** in **Chapter 18** for instructions on how to use the Mass Mask Query function and reports.

Alert **NOTE:** If an action is in progress when the process is run, the PSP Mass will insert a row at the most current processed or corrected row. When the action in progress is completed, the HR Processor should modify the rows as applicable.

PCA Mass Each pay period a process will be run to stop an employees PCA (Physicians Comparability Allowance) based on the **Contract End Date** entered on the Service Agreement Page.

Process Schedule This process will be run on Sunday, the first day of the pay period. The **Effective Date** of the Row inserted will be Saturday, the last day of the prior pay period.

Employee Record Entry The mass process will insert a row into the employee's record for the stop with the following attributes:

- **Effective Date:** Contract End Date
- **NOA:** 959
- **NOA Ext:** 0
- **Action:** DTA
- **Reason:** DTA
- The **PCA Earnings Code** (Z codes) will be removed from the **Other Pay Information** page.

PCA Code Errors The mass will not automatically terminate the PCA if the earnings code was erroneously entered as PCA instead of one of the Z earnings codes. In such instances, the PCA will need to be terminated manually. Be sure to use the Z earnings codes for PCA



Process Check Users may use **Mass Mask Query** to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

Home > PeopleTools > Query Manager > Use > Query Manager

Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools** in **Chapter 18** for instructions on how to use the Mass Mask Query function and reports.

Alert **NOTE:** If an action is in progress when the process is run, the PCA Mass will insert a row at the most current processed or corrected row. When the action in progress is completed, the HR Processor should modify the rows as applicable.

Union Dues Mass Changes in Union dues deduction amounts do not require actions by Users. All Union changes are processed automatically by the Union Mass process. This mass action automatically creates stop/change transaction for all employees affected by deduction changes in the **Union Master**.

Schedule This mass process is executed as updates are entered into the EHRP **Union Configuration Tables**.

Automatic Payroll Transactions Changes made to the Union Master will automatically create the following payroll transactions:

- 9504 - Union Dues Stop Mass
- 9511 - Union Dues Change Mass
- 9510 - Individual Start
- 9501 – Individual Stop – Outside BU
- 9502 – Individual Stop – EE Requested
- 9503 – Individual Stop – Union Requested

Process Check Users may use **Mass Mask Query** to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

Home > PeopleTools > Query Manager > Use > Query Manager

Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools in Chapter 18** for instructions on how to use the Mass Mask Query function and reports.

Manual Dues Start/Stop PARs are not required for Union Dues Deductions. Users may start or stop employee Union deductions manually on the **General Deductions Data** page.

Navigational Path **Home>Compensate Employees>Maintain Payroll Data (USF)>Use>General Deduction Data**

Procedure The following details steps for processing Union deduction starts and stops manually.

1 Follow the navigational path:

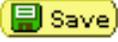
Home>Compensate Employees>Maintain Payroll Data (USF)>Use>General Deduction Data

2 Enter the **Employee ID** to pull up the employee record or click on **Lookup** to perform a search for the employee by Name or other criteria

The **General Deduction Data** page appears:

Dues Start To Start Union dues deduction do the following:

3 Click the to insert a Row on the **Deduction Code Row**

- 4 Enter the **Union Account Code (Deduction Code)**
- Navigational Tip** The  icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field
- 5 Enter the **Effective Date**
- Tab out of the **Effective Date** field.
- 6 Click  .
- Dues Stop** To stop Union dues deductions do the following:
- 3 Click the  to insert a **Row** on the most effective-dated row for the applicable deduction
- 4 Enter the **Effective Date**
- 5 Enter the **Deduction End Date**. This must be equal to the **Effective Date**.
- 6 Tab out of the **Deduction End Date** field.
- 7 Enter the type of action being processed:
- 9501 – Individual Stop – Outside BU
 - 9502 – Individual Stop – EE Requested
 - 9503 – Individual Stop – Union Requested
- 8 Click  .
- Dues Changes** Changes to Union dues deductions amounts do not require any action by the User. These changes are processed automatically by the Union Mass.

Employee Realignment Mass The Realignment Mass action moves the employee in an entire department from one Admin Code to another.

Procedure A **Help POC Ticket** must be entered by the Agency to run this process. The following data should be provided in the **Help POC Ticket**:

- Effective Date
- Old Department ID
- New Department ID
- New Location Code



- Authority description

Process Check Users may use Mass Mask Query to generate a report to determine what has been processed or what errors have occurred. The query navigational path and query name follow.

Home > PeopleTools > Query Manager > Use > Query Manager

Query Name: HE_MASS_MASK_STATUS.

Please see **Information Tools** in **Chapter 18** for instructions on how to use the Mass Mask Query function and reports.

**Manual
Realignment**

Employee realignment (or reassignment) actions may also be done manually.

NOTE: The User must be sure to enter the position details on the **Position Data** pages prior to entering the appropriate action on the **PAR** pages. The user must ensure the details in **Position Data** and the **PAR** pages are entered correctly to mitigate errors.