HR Front End Transaction – Adding a Lump Sum Job for Monthly Employees

Overview
Transaction type: Add a Job
Routing: Org Initiate, Org Review, College Review, HR Apply
Documents to attach: Service in Excess of 100% if employee is currently 100%

HR Front End Detailed Steps

1. First review the position to be used for this employee. Especially verify that the Type is Pooled. If changes need to be made complete a Position Creation and Maintenance transaction before processing the Add a Job transaction.
2. Search for employee and open Employee Record View.
3. Select Transactions » Add a Job.
5. Click Continue.
6. Enter Job Begin and Job End Dates using standard pay period dates (16th of the month for the begin date and the 15th of the month for the end date).
7. Click Continue.
8. Type a position number, or search for a position by chart and org and highlight the desired position. You should have a pooled position already established.
9. Click Continue.
10. Position Data is not editable in an Add a Job transaction. All Lump position have Type P-Pooled.
11. Click Continue.
12. On the Job Data screen
   a. Change Job Title to match regular title.
   b. Factor defaults to 1. Edit if Lump is extended longer than one pay period.
   c. Enter total lump sum in the Annual rate field (the Hourly, Monthly, and Annual should all be the same if there is only one factor/pay).
   d. Verify Timesheet Org (defaults from Position Budget Org).
   e. Verify the Job Labor Distribution.
      i. If a change is needed to existing values click on that field, overwrite the numbers, and click Update to the right of the LD row. Note: You must click Update next to each LD row for which you change values.
      ii. If an additional line is needed, use vertical blank fields below the LD row(s) to enter data, click Add LD.
   f. Type a Job Comment with the service dates and description of service provided. Also include contact email & phone number, and click Add Comment. Note: Once the comment is added you cannot change or remove it.
   g. Click Continue.
13. If necessary, add attachment(s) as follows:
   a. Click Attachments tab
   b. Click Add Attachment
c. Click Browse, select document to attach (either on your hard drive or network drive).
d. Click Open
e. Click Add
f. Select Document Type, and type a Description.
g. Repeat as necessary for additional documents. Once all are listed, click Upload. Check the message at the top of the screen to ensure that no error occurred.
h. Click Done.
i. You may change the Doc Type in Employee Record View by using the drop down box. You can also edit the Description. Then click Save Attachment.

14. Click Memos tab, type a memo with your contact e-mail address & phone number, and click Add. If no service is involved and retirement should not be deducted from the pay you may request the ‘SAP’ earn code in the memo, as well.

15. Routing
a. Review all changes and Route. Should get message Success routing to Org Review stop.
b. If initiator also has Org Review permissions, click the Take Ownership button in the Employee Record View. Otherwise, the transaction appears in Org reviewer Group Inbox. Org reviewer must Take Ownership, review, and Route. Should get message success routing to COLLEGE Review stop. (If reviewer is not the Home Org transaction routes to the Home Org before going to the college stop.)
c. Transaction appears in college reviewer Group Inbox. College reviewer must Take Ownership, review, and Route. Should get message success routing to CAMPUS Apply stop. (If reviewer is not the home college transaction routes to the home college before going to the campus stop.)
d. Transaction appears in Academic HR Group Inbox.
   i. Academic HR must Take Ownership.
   ii. If “SAP” earn code is specified in Memos, click Default Earnings accordion to expand. Select Earnings Code ‘SAP’, type amount of lump sum in Special Rate, type Job End Date+1 in End Date. Click Update.
   iii. Review remainder of transaction and Apply.