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

Overview
Transaction type: Add a Job
Routing: Org Initiate, Org Review, College Review, HR Apply
Documents to attach: Civil service lump sum form, Staff HR approval email, timesheet (for overtime non-exempt employees)
Guidelines at http://humanresources.illinois.edu/hr-professionals/hiring-employees/Lump-Sum-Payment-Guide.html

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 biweekly pay period dates (usually for the BW pay period the service provided ends in).
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 positions 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 Hourly, Monthly, or 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. 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. 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 Staff HR Group Inbox.
   i. Staff HR must Take Ownership.
   ii. LP jobs default to Pay ID MN, which is not editable until the Apply stop. Select Pay ID BW before applying.
   iii. Review remainder of transaction and Apply.