

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**.
4. Select **Employee Group L-Lump Sum**.
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**.