

On Line PER-3 Training – Additional Compensation

PS9HRPRP 8.53
PS9HEWEBDEV11 RCB

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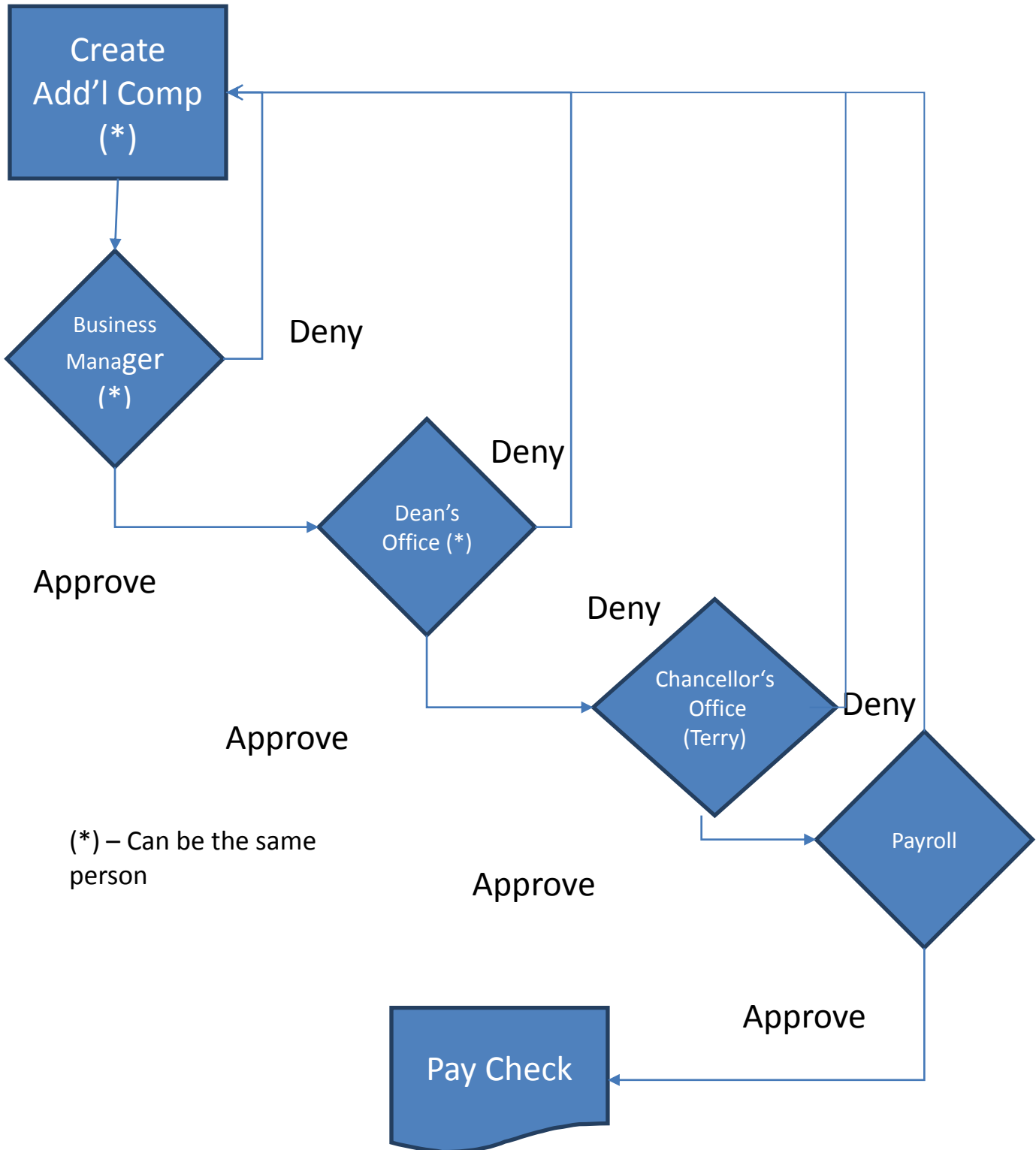
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Personnel Status Change Form (PER-3)

Additional Compensation

This section is to be completed when an employee is paid for performing duties in addition to or outside the normal areas of responsibility of his/her job. These duties would be at the request of a Health Sciences Center Department and the funds would be distributed through the Health Sciences Center. For further information, please refer to PM-3

Additional Compensation Workflow



Manual PER-3s

Occasionally, there will be circumstances when PER-3s will not fit in this workflow model. In these cases, paper PER-3s should be submitted. The largest type of these exceptions is the “supersede” PER-3s which should continue to be submitted on pink paper.

Entering PER-3s for Additional Compensation

Navigation

Main Menu → LSUHSC Processes → Human Resources → Use → Create PER-3 Requisition

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[Additional Compensation](#)

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Selecting “Additional Compensation” link above will transfer you to the screen below.

Request Nbr: 0
PER-3 Type: Additional Compensation
Last Update:

***Department:** [Clone Requisition](#)
From Date: **Thru Date:**
Amount: **Num of Periods:** 0
Justification: [Attachments](#)

Employee Distribution										
Empl ID	Rcd#	Name	PayGrp	Account Code	ErnCd	Amount	Period Amt	Annual Amt	Edit CF	
1	<input type="text"/>	<input type="text"/>		<input type="text"/>					Edit CF	<input type="button" value="+"/> <input type="button" value="-"/>

[Refresh Totals](#)

Account Summary										
Account Code	Dept Code	Fund	Program	Class	Project/Grant	Account	Description	Amount	Period Amt	Annual Amt

Employee Summary				
Empl ID	Name	Amount	Period Amt	Annual Amt

Clone Requisition Link:



Clicking on this link will allow you to copy a prior transaction, including attachments, to create a new transaction.

- Enter prior "Request Nbr" to clone.
- Select "Copy Attachments" option if desired.

A screenshot of a dialog box titled "PER-3 Clone existing request". Inside, there is a sub-dialog titled "Copy Existing PER-3 Requisition". It contains a "Request Nbr:" label followed by a text input field with a magnifying glass icon. Below that is a "Copy Attachments?:" label followed by an unchecked checkbox. At the bottom are "OK" and "Cancel" buttons.

Department:

Department will be used to determine routing for approvals.

User will only be allow to select departments they have access to.

A form field for department selection. It shows "*Department:" followed by a text box containing "NO1490190" and a magnifying glass icon. To the right, the text "M/S - ACADEMIC AFFAIRS" is displayed.

From Date / Thru Date:

Two date selection fields. The first is labeled "From Date:" and the second is labeled "Thru Date:". Both have empty text boxes and a calendar icon.

a) From Date can only start on the first day of the month and the Thru Date can only end on the last day of the month unless the period is less than one month.

b) Examples of Acceptable Date Ranges

A date range selection example showing "From Date:" with the value "11/15/2013" and "Thru Date:" with the value "11/30/2013". Both fields have calendar icons.A date range selection example showing "From Date:" with the value "10/1/2013" and "Thru Date:" with the value "12/31/2013". Both fields have calendar icons.

c) From/Thu Date cannot cross fiscal year.

d) From Date cannot be older than 180 days (~6 months) from today.

e) Thru Date cannot be later than 365 days from today.

Amount:

Total amount being requested for the transaction.

Amount:	<input type="text" value="10,000.00"/>
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- Validation will occur to verify the balance between the Amount entered and the amounts entered in the Employee Distribution Section. If there is a mismatch, the following error will occur.

Amount:	<input type="text" value="10,000.00"/>	Num of Periods:	<input type="text" value="1"/>
Message			
Total amount does not equal to calculated distribution amounts.			
<input type="button" value="OK"/>			

Attachments:

Add attachments to the PER-3 Transaction by clicking on the  "Paperclip" icon.

	Attachments
	PER3_0072746.xls <input type="button" value="-"/>

- Maximum size of the attachment is controlled by this field currently set to 3MB (3000 bytes). It can be changed if needed.

Value Group	Value1
MAXSIZE	3000

- Valid file types are controlled by the 'PER3_ATTACH' list.

	Value Group
1	<input type="text" value=".DOC"/>
2	<input type="text" value=".DOCX"/>
3	<input type="text" value=".PDF"/>
4	<input type="text" value=".XLS"/>
5	<input type="text" value=".XLSX"/>

Social Security Numbers in attachments should be avoided.

Employee Distribution:

Enter the additional compensation amounts for each employee.

Employee Distribution											View All	First	1-2 of 2	Last
Empl ID	Rcd#	Name	PayGrp	Account Code	ErnCd	Amount	Period Amt	Annual Amt	Edit CF					
1	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>			Edit CF	+	-			

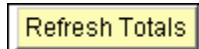
Empl ID: Uses row level security from PERS_SRCH_EMP

Account Code: Only list account codes for 501300, 501310, 501340 and 505300.

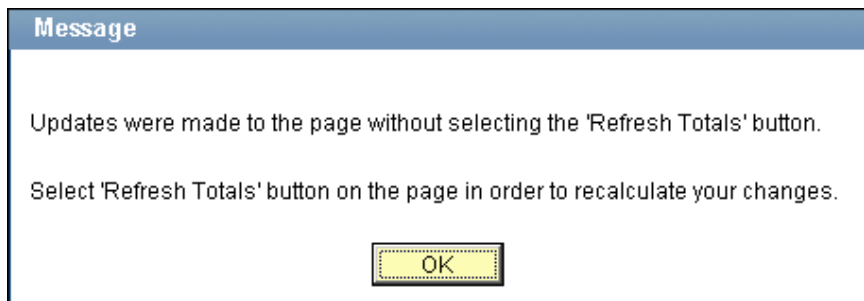
Amount: Enter amount requested for the account.

Refresh Totals:

Refresh Totals button is used to calculate the latest amounts in the Account Summary and the Employee Summary sections.

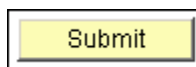


- **You must click on “Refresh Totals” button before pressing "Submit" to review latest totals.**
- You must click on “Refresh Totals” button if any edits are made on the requisition page.
- If you do not press Refresh Totals, the following message will popup.



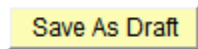
Submit Button:

Click on the “Submit” button to send the requisition for approvals.



Save as Draft Button:

Click on the “Save as Draft ” button to save the requisition for future submission.




Drafts can be pulled up using the View function (to be discussed later)

Post Submission Routing Screen



Upon successful submission, you will receive the following confirmation page showing approval routings

Submit Confirmation

 You have successfully submitted a PER-3 #100003 - Additional Compensation - as of 10/31/2013



Request #100003:Approved

Administration

Skipped  No approvers found Dean/Dept Head	→	Self Approved  Cao, Son Chancellor 10/31/13 - 3:10 PM
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Request #100003:Pending

HR/Payroll

Pending  Cao, Son Human Resource	→	Not Routed  Cao, Son Payroll
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View PER-3 Request

Once the PER-3 Request is all approved, the "Payroll Info" group box should show to indicate how payroll processed it.

Favorites | Main Menu > LSUHSC Processes > Human Resources > Use > Approve/View PER-3

Request Nbr:	100003	Status:	Approved
PER-3 Type:	Additional Compensation	Last Update:	10/31/13 3:38:03PM

*Department:	NO1490190	M/S - ACADEMIC AFFAIRS
From Date:	11/01/2013	Thru Date: 11/30/2013
Amount:	8,000.00	Num of Periods: 1
Justification:	PER-3 TEST	

Payroll Info

Sent to Payroll?

Pay End Date: 11/30/2013

Attachments

The bottom of transaction page will also show an audit trail.

Transaction Audit						
Seq#	Action	User ID	User Name	Last Update Date/Time	Comment	Payroll Messages
1	Submitted	SCAO	Cao, Son	10/31/2013 3:44:31PM		
2	Approved	SCAO	Cao, Son	10/31/2013 3:44:57PM	hr ok	
3	Approved	SCAO	Cao, Son	10/31/2013 3:47:11PM		*** Warning *** Outstanding Addl Outstanding Addl

Review PER-3 Transactions Using Worklist

Main Menu → Worklist → Worklist

This page lists all transaction that needs to be review or approval.

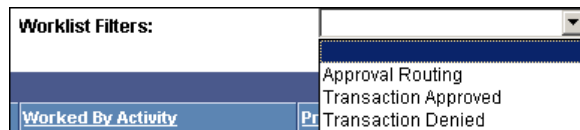
- Optional navigation to this page is the 'Worklist' link on upper top right.



Worklist						
Worklist for SCAO: Cao, Son						
Detail View		Worklist Filters:		<input type="text"/> Feed		
From	Date From	Work Item	Worked By Activity	Priority	Link	
Cao, Son	01/15/2014	Transaction Denied	Approval Workflow	3-Low	ZZ_PER3_62_LSUNO_2013-01-02_N_0_TRANSACTIONID:100013_DEPTID:NO1050100_RDC:D_0_R	Mark Worked
Cao, Son	01/15/2014	Transaction Denied	Approval Workflow	3-Low	ZZ_PER3_63_LSUNO_2013-01-02_N_0_TRANSACTIONID:100014_DEPTID:NO1050100_RDC:D_0_R	Mark Worked
Jimmy 5 - HR	01/14/2014	Approval Routing	Approval Workflow	3-Low	ZZ_PER3_43_LSUNO_2013-01-02_N_0_TRANSACTIONID:100011_DEPTID:NO1490125_RDC:RA_0_A	Mark Worked

Worklist Filters:

Filter available worklist transactions.

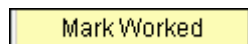


Link:

Select hyperlink will transfer to specified PER-3 transaction page for review/approval.

Mark Worked:

Select "Mark Worked" button if enabled to remove transaction from worklist.



View Using Manager Self Service

Main Menu → Manager Self Service → Review Transactions

This page allows users to view list all PER-3 transaction that they either submitted for approval or review.

Review Transactions

Son Cao

This page allows you to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself. For each request you can get detailed information by selecting the hyperlink.

Transactions:

Process ID:

Approval Transactions Find First 1-12 of 12 Last

Transaction Name	Submitted By	Submitted On Behalf Of	Submitted On	Thread Status
PER3 Transaction	Son Cao		1/13/2014 - 9:10 AM	Approved View Details
Transaction Details				
DEPTID	TRANSACTIONID			
NO1050100	100007			
Transaction Name	Submitted By	Submitted On Behalf Of	Submitted On	Thread Status
PER3 Transaction	Jimmy Salva		1/14/2014 - 2:37 PM	Pending Approve/Deny
Transaction Details				
DEPTID	TRANSACTIONID			
NO1490125	100011			

Transactions:

Filter transaction list with available options.

Transactions:

- All
- I have approved
- I have denied
- I have submitted
- Pending my review

Process ID:

Select 'ZZ_PER3' to view PER-3 transactions.

Refresh:

Click refresh button to get transaction lists.

View Details – Approve/Deny

Click hyperlink to transfer to specified PER-3 page for review or approvals.

[View Details](#)

[Approve/Deny](#)

Data Dictionary Appendix

ZZ_PER3_TBL

Main Table – Header Table

WL Tran ID	Worklist Transaction ID
Dept ID	Department ID
Per-3 Type	ACP for Additional Compensation Payment
Submitted Updat	Submitter
Trans Date	Date Created/Modified
WF Status	Workflow Status
From Date	Beginning Date
End Date	Ending Date
Amount6	Total Amount of Batch
Periods	Number of months
Comment	Comment
Pay Period End	Pay Period Ending date if sent to Payroll
Paid?	Yes or No
Administrator	Not currently in Use
WL Tran ID	Workflow Transaction ID
Last Upd DtTm	Date Last Upded

ZZ_PER3_EE_DS

Detail for Add Comp

WL Tran ID	Worklist Transaction ID
ID	Employee ID
Empl Record	Employee Record
SeqNum	Sequence Number
Combo Code	Combination Code
Earn Code	Earnings Code
Amount6	Amount
Period Amts	Amount per month
Group	Pay Group

ZZ)_PER3_EE links to ZZ_PER3_TBL by WL Tran ID.

Table Used to Send Data to the Pay Check

PS_ZZPY_ADDONETIME

Co	Company # - HSCNO is Co "001"
Pay Period End	Pay Period Ending Date
ID	Employee ID
SeqNum	Record Sequence Number
Combo Code	Combination Code
Earn Code	Earnings Code
Oth Py	Amount of Payment
Processed?	Yes or No
Group	Pay Group
Off Cycle	Yes or No
Page	PeopleSoft Reference
Line Nbr	PeopleSoft Reference
Earns Begin	Earnings Begin Date
Earns End	Earnings End Date
Record Src	Source Record Type