Mass/Mask Actions Created on April 4, 2005

COPYRIGHT & TRADEMARKS

Copyright [©] 2003 by Global Knowledge. All rights reserved. Information in this document is subject to change without notice and does not represent a commitment on the part of Global Knowledge.

Global Knowledge Knowledge Products Division http://globalknowledge.com 475 Allendale Road, Suite 102 King of Prussia, PA 19406 +1 (610) 337-8878

Table of Contents

| Introduction | iv |
|-------------------------------------|----|
| Mass Actions | |
| Manuel Leave Category Changes | |
| Performance Ratings Mass | 9 |
| Manual Entry of Performance Ratings | |
| Union Dues Mass | |
| Manual Dues Start/Stop | |
| Mask Actions | |
| Awards Mask | |
| Health Benefits Mask | |
| Employee Realignment Mask | |

Introduction

The ability to change large amounts of data, as well as key sizable repetitive workloads, reduces processing time and increases operational efficiency.

An EHRP enhancement, Mass Mask Actions, helps users minimize manual keying of changes. Mass Mask virtually eliminates the need to key DHHS specific actions (the 9xxx Nature of Action Codes). The 9xxx NOAs constitute approximately 40% of keying necessary to process personnel actions in DHHS.

This enhanced capability includes two kinds of processing:

- **Mass Actions** - which make the same changes to large groups of records without manual keying.

- **Mask Actions** - which holds certain information constant for large groups of records while only the data that is different is manually keyed.

Mass Actions

Leave Category Change Mass

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.

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.

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. **Process Schedule**

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.

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.

Temporary Employee

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.

Manuel Leave Category Changes

Introduction

PAR Actions are not keyed for manual leave category changes. Users enter the employee's leave category change directly on the Leave Plans page.

Procedure

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



| | 🙆 Home | 健 Worklist | 🕜 Help | 🔶 Sign C |
|-------------------------|---------------|------------|--------|------------|
| ne | W Home | WORKISt | | e origin e |
| O Develop Workforce | | | | |
| O Administer Workforce | | | | |
| Compensate Employees | | | | |
| Monitor Workplace | | | | |
| O Define Business Rules | | | | |
| Self Service | | | | |
| O He Process Menu | | | | |
| Help PoC Online | | | | |
| PeopleTools | | | | |
| C People roois | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|--|
| 1. | Click the Compensate Employees link. |
| 2. | Click the Administer Base Benefits link. |
| 3. | Click the Use link. |
| 4. | Click the Leave Plans link. |



| PEOPLE | | | | d < 1 |
|--|------|------------|------------|-----------|
| 8 | Home | 🜔 Worklist | 🕜 Help | 🔗 Sign Ou |
| Home > <u>Compensate Employees</u> > <u>Administer Base Benefits</u> > <u>Use</u> > Leave P | ans | | New Window | |
| Leave Plans | | | _ | |
| Find an Existing Value | | | | |
| EmplID: | | | | |
| Empl Rod Nbr: | | | | |
| Name: | | | | |
| Last Name: | | | | |
| Alternate Character Name: | | | | |
| Personnel Status: | | | | |
| 🗆 Include History 🗖 Correct History | | | | |
| Search Clear Basic Search | | | | |
| Dearch Clear David Dearch | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|---|
| 5. | Search for the desired employee. |
| | Click in the Last Name field. |
| 6. | Enter the desired information into the Last Name field. Enter "WINTER". |
| 7. | Click the Search button. |
| 8. | Select the desired employee. Click WINTER, ADAM |



| PEOPLE | | | | h | SEC) |
|----------------------------|--|------------|-------------------------------|---------------------|--------------------|
| 000- | | 🙆 Home | 😥 Worklist | 🕜 Help | \varTheta Sign Out |
| Home > Compensate Empl | ovees > Administer Base Benefits > Use > Le | eave Plans | <u>N</u> | New Window | |
| Leave Plans (USA) | | | | | |
| WINTER,ADAM | ID: | 0011 | Empl Rcd#: | 0 | |
| Plan Type | ID: | 0011 | Empi Rcu#: Find View All | First 🗹 1 of 1 | 🕨 Last |
| *Plan Type: 50 Q | Sick | | | | + - |
| Coverage | | | View All | First 🔳 1 of 1 🛙 | Last |
| Coverage Election | ⊙Elect ○Waive ○ Terminate | *Electi | on Date: 01/14/2 | 2004 🗊 📘 | + - |
| *Effective Date: | (in the second sec | LIUUU | | | |
| Benefit Plan: | Q | | Optn: | | |
| Employee Status: | Leave | | | | |
| Benefit Program: | FEDERAL GOVT EMPLOYEES | | | | |
| 🕞 Save) (Q Return to Searc | h) <mark>∔≣NextinList</mark> (†≣Previous in List) | | 週 Update/Display) (過 | Include History) (🛐 | Correct History) |

| Step | Action |
|------|--|
| 9. | Click the Add a new row at row 1 button. |
| 10. | Click the Choose a date button. |



| PEOPLE" | | | | | | ACT - |
|--------------------------|-----------------------|---|-----------|--------------------|----------------------|------------------|
| 200- | | | 🙆 Home | 📵 Worklist | 🕜 Help | 📀 Sign Ot |
| Home > Compensate Empl | ovees > Administer Ba | i <u>se Benefits</u> > <u>Use</u> > Le | ave Plans | | New Window | |
| / Leave Plans (USA) | | | | | | |
| WINTER,ADAM | | ID: | 0011 | Empl Rcd#: | | |
| Plan Type | | | | Find View All | First 🗹 1 of 1 🛛 | 🕨 Last |
| *Plan Type: 50 🔍 | Sick | | | | l | + - |
| Coverage | | | | <u>View All</u> | First 🚺 1 of 2 🕨 | Last |
| Coverage Election | © Elect ⊂ Wa | ive C Terminate | *Ele | ction Date: 01/14 | 4/2004 🗊 🗌 | + - |
| *Effective Date: | 01/14/2004 🗊 | | | | | |
| Benefit Plan: | | January 🔻 2004 | × | Optn: | | |
| Employee Status: | Leave | 6 M T W T F | S | | | |
| Benefit Program: | FEDERAL G | 1 2 4 5 6 7 8 9 | 3 10 | | | |
| | · | 11 12 13 14 15 16 | 17 | | | |
| | | 18 19 20 21 22 23 | 24 | | | |
| | | 25 26 27 28 29 30 | 31 | | | |
| | L | | | | | |
| 🗐 Save) 🔍 Return to Sear | ch) (∔≣ Ne×t in List) | 🔇 Current Date 🕨 |) | (2 Update/Display) | 🔏 Include History) 🕼 | Correct History) |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| Step | Action |
|------|-------------------------------------|
| 11. | Click the desired date. Click 19 |



| PEOPLE | | | | le | |
|--------------------------|--|----------------|-----------------------|----------------------|-----------------|
| 000- | | 🙆 Home | 📵 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > Compensate Employ | ees > Administer Base Benefits > Use | > Leave Plans | <u>N</u> | ew Window | |
| / Leave Plans (USA) | | | | | |
| WINTER, ADAM | | D: 0011 | Empl Rcd#: | 0 | |
| Plan Type | | | Find View All | First 🗹 1 of 1 🛛 | |
| *Plan Type: 50 🔍 🤤 | Bick | | | | + - |
| Coverage | | | <u>View All</u> | First 🖪 1 of 2 🕨 | Last |
| Coverage Election | ⊙ Elect ○ Waive ○ Terminat | e *Electi | ion Date: 01/14/20 | D04 🗊 📕 | |
| *Effective Date: | 01/19/2004 | | | | |
| Benefit Plan: | ٩ | | Optn: | | |
| Employee Status: | Leave | | | | |
| Benefit Program: | FEDERAL GOVT EMPLOYEES | | | | |
| Save QReturn to Search | (<mark>4≣ Nextin List)</mark> (†≣ Previous in List) | | (週 Update/Display) (週 | Include History) (중C | orrect History) |

| Step | Action |
|------|--|
| 12. | Click the Choose a date button. |
| | it. |



| PEOPLE | | | | | | 10 | |
|------------------------------|---|-----------------|----------------|----------|--------------|-------------------|-------------------------|
| 200 | | 🙆 Home | e 🔞 Wi | orklist | 🕜 н | lelp | 😔 Sign Out |
| Home > Compensate Emplo | wees > Administer Base Benefits > Use > | ∘ Leave Plans | | l | New Windov | w | |
| Leave Plans (USA) | | | | | | | |
| WINTER, ADAM | I | D: 0011 | Emp | I Rcd#: | 0 | | |
| Plan Type | | | Find \ | View All | 🛛 First 🔳 | 1 of 1 💽 | Last |
| *Plan Type: 50 🔍 | Sick | | | | | + | |
| Coverage | | | <u>Vi</u> | iew All | First 🖪 1 | 1 of 2 🕨 上 | ast |
| Coverage Election | ⊙ Elect ○ Waive ○ Terminate | э _{*Е} | Election Date: | 01/14/ | 2004 🗊 | + | - |
| *Effective Date: | 01/19/2004 🗊 | | | | | January | ▼ 2004 ▼ |
| Benefit Plan: | ٩ | | Optn: | | | S M T | W T F S |
| Employee Status: | Leave | | | | | 456 | 12: |
| Benefit Program: | FEDERAL GOVT EMPLOYEES | | | | | 4 5 0 11 12 13 | |
| | | | | | · | 18 19 20 | 21 22 23 24 |
| | | | | | | 25 26 27 | 28 29 30 3 [.] |
| | | | | | | Curr | ent Date 🕟 |
| 📳 Save) 🛛 🔍 Return to Search | n) (∔≣ Next in List) (↑≣ Previous in List) | | (君 Update/I | Display | Incluse marc | | |
| | | | (PLI opened) | | | | <u></u> , |
| | | | | | | | |
| | | | | | | | |
| • | | | | | | | Þ |

| Step | Action |
|------|--|
| 13. | Click the desired date. Click 19 |
| | 19 |



| PEOPLE | | | | | 1. |
|-----------------------------|--|------------|-----------------------|---------------------|--------------------|
| 000 | | 🙆 Home | 😥 Worklist | 🕜 Help | \varTheta Sign Out |
| Home > Compensate Empl | oyees > Administer Base Benefits > Use > L | eave Plans | <u>1</u> | New Window | |
| / Leave Plans (USA) | | | | | |
| WINTER,ADAM | ID: | 0011 | Empl Rcd#: | 0 | |
| Plan Type | | | Find View All | First 🖪 1 of 1 | 🕑 Last |
| *Plan Type: 50 🔍 | Sick | | | | + - |
| Coverage | | | <u>View All</u> | First 🖪 1 of 2 🛽 | Last |
| Coverage Election | ⊙ Elect ○ Waive ○ Terminate | *Electi | on Date: 01/19/2 | 2004 🗊 | + - |
| *Effective Date: | 01/19/2004 | | | | |
| Benefit Plan: | ٩ | | Optn: | | |
| Employee Status: | Leave | | | | |
| Benefit Program: | FEDERAL GOVT EMPLOYEES | | | | |
| (🖶 Save) (Q Return to Searc | h) (+≣NextinList) (†≣Previous in List) | | (Æ Update/Display) (Æ | Include History) (😵 | Correct History) |

| Step | Action |
|------|--|
| 14. | Click in the Benefit Plan field. |
| 15. | Enter the desired information into the Benefit Plan field. Enter "SL4". |
| 16. | Click the Save button. |
| 17. | The informatoin is saved. End of Procedure. |

Performance Ratings Mass

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

Introduction

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.

Procedure

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



| PEOPLE | | | 1 | AC) |
|-------------------------|--------|------------|--------|----------|
| | 🙆 Home | 😥 Worklist | 🕜 Help | 😔 Sign O |
| me | | | | |
| Develop Workforce | | | | |
| O Administer Workforce | | | | |
| Compensate Employees | | | | |
| Monitor Workplace | | | | |
| O Define Business Rules | | | | |
| O Self Service | | | | |
| O He Process Menu | | | | |
| O Help PoC Online | | | | |
| O PeopleTools | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|---|
| 1. | Click the Administer Workforce link. |
| 2. | Click the Manage Performance (USF) link. |
| 3. | Click the Use link. |
| 4. | Click the Employee Appraisal link. Employee Appraisa |



| Sole | 🙆 Home | 健 Worklist | 🕜 Help | Sign Ou |
|---|---|------------|------------|---------|
| Home > Administer Workforce > Manage Performs | ance (USF) > <u>Use</u> > Employee Appraisa | I | New Window | |
| Employee Appraisal | | | _ | |
| Find an Existing Value | | | | |
| EmpliD: | | | | |
| Empl Rod Nbr: | | | | |
| Name: | | | | |
| Last Name: | | | | |
| Personnel Status: | | | | |
| 🗖 Include History 🗖 Correct History | | | | |
| Search Clear Basic Search | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|--|
| 5. | Enter the Employee ID to pull up the employee record. Enter the desired information into the EmplID field. Enter "0243". |
| 6. | Click the Search button. |



| PEOPLE | | | | | | Å | AS - |
|------------------------|----------------------------|----------------------------|----------|-------------|---------------------------------|-------------------|---------------------------------------|
| 000 | | | 🙆 Ho | me 🤇 | Vvorklist | 🕜 Help | 🕙 Sign Ou |
| Home > Administer Work | force > <u>Manage Perf</u> | ormance (USF) > Use > Emp | loyee Ap | praisal | New | Window | ^ |
| / Employee Appraisal 1 | ٦ | | | | | | |
| | | | | | View All | First 🖪 1 of | 1 🗈 Last |
| Greenberg,Zelda | | Employee | ID: | 0243 | Empl Rcd#: | 0 | +- |
| *Effective Date: | 01/14/2004 🗊 | | Revi | ew Type: | Supervisory F | Rating 💌 | |
| From/To Date | 31 | | Next | Review Date | e: | 1 | |
| Performance Plan: | STANDARD | OPM Rating of Record Patte | ern H | | | | |
| Rating Scale: | H Q | OPM Rating of Record Patte | ern H | | OPM Pattern: | н | |
| Review Rating: | ٩ | | | | OPM Rating: | | |
| Company: | HE 11 | Program Support Center | | | Position: | 00007184 | |
| Department: | PEAF1 | | | | Supervisor: | Other | |
| Job Code: | 00P047 | | | | PP-Grade: | | |
| | | | | | View All Fire | st 🖪 1 of 1 🕨 |] Last |
| *Review Level: | | • | | | | + | |
| Reviewer ID: | Q |] | | | | | |
| Comment: | | | | | <u>_</u> | | |
| | 1 | | | | V | | |
| L | | | | | | | |
| | | | | (| | | |
| (Return to S | earch) | | | (28 U | lpdate/Display) (/2) Ir | nclude History) 😰 | β <mark>Correct History</mark>) ▼ |

| Step | Action |
|------|---|
| 7. | Enter the effective date of the appraisal in the Effective Date field. Click the Choose a date button. |



| | PEOPLE | | | | | | | | 1. ARCO ^ |
|---|--|--|------------------|-------------------------------|------------|----------|---|-----------------|-----------------------|
| | | | | | 🙆 Ho | me | 📵 Worklist | 🕜 Help | 📀 Sign Out |
| н | ome > <u>Administer Work</u> | force > <u>Manaq</u> | e Performance (l | <u>JSF)</u> > <u>Use</u> > En | nployee Ap | praisal | <u>Ne</u> | <u>w Window</u> | • |
| ſ | Employee Appraisal 1 | 7 | | | | | | | |
| | | | | | | | View All | First 🚺 1 | of 1 💽 Last |
| | Greenberg,Zelda | | Emplo | yee | ID: | 0243 | Empl Rcd# | 0 | +- |
| | *Effective Date: | 01/14/2004 | 31) | | Revi | ew Type: | Supervisory | Rating 💌 | |
| | From/To Date | | | | 24 | Review D | ate: | (iii) | |
| | Performance Plan: Rating Scale: Review Rating: Company: Department: Job Code: | STANDARD HQ HE 11 PEAF1 00P047 | 25 26 27 | 21 22 23 24 28 29 30 31 | ìН ìН | | OPM Pattern OPM Rating: Position: Supervisor: PP-Grade: | - | ▶ Last |
| | *Review Level: | | Curre | ent Date 🕟 | | | | | FI FI |
| | Review Level: | | ٩ | | | | | _ | |
| | Comment: | | | | | | * | | |
| | Comment: | | | | | | ¥ | | |
| (| Save) (Q Return to Se | arch) | | | | Q | 웹 Update/Display) (Z | nclude History | Gorrect History ▼ |

| Step | Action |
|------|-------------------------------------|
| 8. | Click the desired date. Click 15 |



| - | | | 🙆 Ho | me 🜔 | Worklist | 🕜 Help | 😔 Sign O |
|----------------------------|----------------------------|-----------------------------------|---------|----------------|---------------|---------------|------------|
| e > <u>Administer Work</u> | force > <u>Manage Perf</u> | ormance (USF) > <u>Use</u> > Empl | oyee Ap | praisal | New | Window | ł |
| nployee Appraisal 1 | 7 | | | | | | |
| | | | | | View All | First 🖪 1 d | 🗗 1 💽 Last |
| reenberg,Zelda | | Employee | ID: | 0243 | Empl Rcd#: | 0 | + - |
| Effective Date: | 01/15/2004 🗊 | | Revi | ew Type: | Supervisory F | ting 💌 | |
| From/To Date | 31, | (iii) | Next | t Review Date: | | Ð | |
| Performance Plan: | STANDARD | OPM Rating of Record Patte | rn H | | | | |
| Rating Scale: | нQ | OPM Rating of Record Patte | rn H | | OPM Pattern: | н | |
| Review Rating: | ٩ | | | | OPM Rating: | | |
| Company: | HE 11 | Program Support Center | | | Position: | 00007184 | |
| Department: | PEAF1 | | | | Supervisor: | Other | |
| Job Code: | 00P047 | | | | PP-Grade: | | |
| | | | | | View All Fir: | st 🖪 1 of 1 🛛 | 🕑 Last |
| *Review Level: | | • | | | | - | - |
| Reviewer ID: | ٩ |] | | | | | |
| Comment: | | | | | A | | |
| | I | | | | × | | |

| Step | Action |
|------|--|
| 9. | In the From/To Date fields, enter the period of time for which the employee is being appraised. |
| | Click in the From Date field. |
| 10. | Enter the desired information into the From Date field. Enter "11/14/2003". |
| 11. | Click in the From/To Date field. |
| 12. | Enter the desired information into the From/To Date field. Enter "01/14/2004". |
| 13. | If known, enter the date of the next review in the Next Review Date field. |
| 14. | Click the Lookup Rating Scale button. |



| PEOPLE" | | | | 1. | \mathcal{I} |
|-----------------------------|--|--------------------------------|------------|-----------|---------------|
| 000- | | 🙆 Home | 😥 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > Administer | Workforce > Manage Performance (USF) > U | <u>se</u> > Employee Appraisal | <u>N</u> | ew Window | |
| Lookup Rat | ing Scale | | | | |
| Rating Scale: | | | | | |
| Description: Lookup Clea | r Cancel <u>Basic Lookup</u> | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

| Step | Action |
|------|--|
| 15. | Click the Lookup button. |
| 16. | Select the Rating Scale from the list. Click OPM Rating of Record Pattern H |



| • | | | 🛛 🙆 Hor | me (| Worklist | 🕜 Help | 🔶 Sign |
|--------------------------|---------------------------|-----------------------------------|----------|--------------|--------------------------|---------------|-------------|
| ne > Administer Work | force > <u>Manage Per</u> | formance (USF) > <u>Use</u> > Emp | loyee Ap | praisal | New | Window | |
| mployee Appraisal 1 | 7 | | | | | | |
| | | | | | View All | First 🛃 1 | of 1 🕨 Last |
| ∂reenberg,Zelda | | Employee | ID: | 0243 | Empl Rcd#: | 0 | + - |
| *Effective Date: | 01/15/2004 🗊 | | Revi | ew Type: | Supervisory F | Rating 💌 | |
| From/To Date | 11/14/2003 🗊 | 01/14/2004 | | Review Date: | : | | |
| Performance Plan: | STANDARD | OPM Rating of Record Patte | ern H | | | | |
| Rating Scale: | H Q | OPM Rating of Record Patte | ern H | | OPM Pattern: | н | |
| Review Rating: | ٩ | | | | OPM Rating: | | |
| Company: | HE 11 | Program Support Center | | | Position: | 00007184 | |
| Department: Job Code: | PEAF1 00P047 | | | | Supervisor: PP-Grade: | Other | |
| | | | | | View All Fir: | st 💽 1 of 1 🛙 | ▶ Last |
| *Review Level: | | • | | | | | |
| Reviewer ID: | | | | | | | |
| Comment: | | | | | <u>_</u> | | |
| | 1 | | | | <u>·</u> | | |

| Step | Action |
|------|--|
| 17. | Click the Lookup Review Rating button. |



| PEOPLE | | | 1 | |
|--|-----------------|------------|------------|-----------|
| | 🙆 Home | 😥 Worklist | 🕜 Help | 🌔 Sign Ou |
| Home > Administer Workforce > Manage Performance (USE) > Use > Emp | loyee Appraisal | 1 1 | New Window | |
| Lookup Review Rating | | | | |
| Review Rating: | | | | |
| Description: | | | | |
| Short Description: | | | | |
| Lookup Clear Cancel Basic Lookup | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|---|
| 18. | Click the Lookup button. |
| 19. | Select the Review Rating from the list. Click Fully successful or equivalent |



| PEOPLE | | | | | | | 1. |
|-------------------------|---------------------------|------------------------------------|--------|-------------|------------------|-------------------|------------------|
| 000- | | | 🙆 Hoi | me 🌘 | Worklist | 🕜 Help | 😂 Sign Out |
| Home > Administer Workf | orce > <u>Manage Perf</u> | ormance (USF) > <u>Use</u> > Emplo | yee Ap | praisal | New | Window | |
| / Employee Appraisal 1 |) | | | | | | |
| 1 | L | | | | View All | First 🛃 1 o | f 1 💽 Last |
| Greenberg,Zelda | | Employee | ID: | 0243 | Empl Rcd#: | 0 | +- |
| *Effective Date: | 01/15/2004 | | Revi | ew Type: | Supervisory F | Rating 💌 | |
| From/To Date | 11/14/2003 🗊 | 01/14/2004 | Next | Review Date | : | ÷;) | |
| Performance Plan: | STANDARD | OPM Rating of Record Patter | пH | | | | |
| Rating Scale: | H Q | OPM Rating of Record Patter | n H | | OPM Pattern: | Н | |
| Review Rating: | 3 Q | Fully successful or equivaler | ıt | | OPM Rating: | 3 Level III | |
| Company: | HE 11 | Program Support Center | | | Position: | 00007184 | |
| Department: | PEAF1 | | | | Supervisor: | Other | |
| Job Code: | 00P047 | | | | PP-Grade: | | |
| | | | | | View All Fin | st 💽 1 of 1 🛙 | Last |
| *Review Level: | | • | | | | + | |
| Reviewer ID: | <u> </u> | | | | | | |
| Comment: | | | | | | | |
| | | | | | Ψ. | | |
| | | | | | | | |
| | | | | | | | |
| 🗐 Save) 🔍 Return to Se | arch | | | (2 Uj | odate/Display) 🔊 | nolude History) [| Correct History) |

| Step | Action |
|------|---|
| 20. | Click the Save button. |
| 21. | The performance rating is saved. End of Procedure. |

Union Dues Mass

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

Introduction

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

Procedure

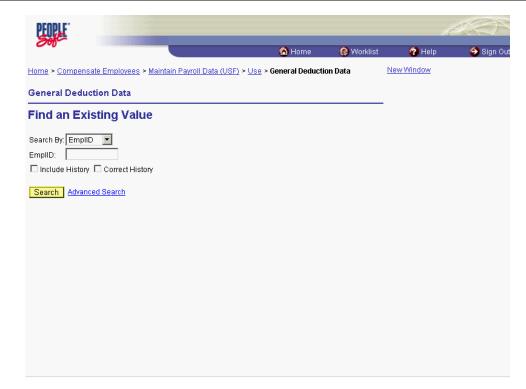
The following steps detail the procedure for processing Union deduction starts and stops manually.



| | 🙆 Home | 😥 Worklist | 🕜 Help | 📀 Sign |
|------------------------|--------|------------|--------|--------|
| ne | | - | | |
| Develop Workforce | | | | |
| O Administer Workforce | | | | |
| Ocompensate Employees | | | | |
| O Monitor Workplace | | | | |
| Define Business Rules | | | | |
| Self Service | | | | |
| He Process Menu | | | | |
| Help PoC Online | | | | |
| PeopleTools | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|--|
| 1. | Click the Compensate Employees link. |
| 2. | Click the Maintain Payroll Data (USF) link. |
| 3. | Click the Use link. |
| 4. | Click the General Deduction Data link. General Deduction Data |





| Step | Action |
|------|---|
| 5. | Enter the Employee ID to pull up the employee record or click on the Search By list to perform a search for the employee by Name or other criteria. Enter the desired information into the EmplID field. Enter "0103". |
| 6. | Click the Search button. |



| | | | | 14 | |
|--|---|------------------------|----------------------|--------------------------|--------------|
| | | 🙆 Home | 📵 Worklist | 🕜 Help | 😑 S |
| 2 > Compensate Employees > | • <u>Maintain Payroll Data (USF)</u> > Us | se > General Deduction | n Data 🕴 | New Window | |
| neral Deduction Data | | | | | |
| | | | | | |
| ARCROFT,CHAD | | ID: 0103 | | | |
| ompany: HE Department of Department of Deduction | IT HHS | <u>Find</u> Vi | ow All Eirct 🔳 | 1 of 1 🕨 Last | |
| | Q | <u>rmu</u> j vi | | + - | |
| Deduction Code: | | <u>Find</u> View A | All First 🛃 1 of | | |
| *Effective Date: | | Take on all Paygro | | + - | |
| | | Take on an Taygro | apo 🖂 | | |
| Distribution Cd: | | | | | |
| *Deduction Calculation Routine: | Default to Deduction Table | Distrik | oution Information | | |
| Deduction End Date: | 31, | Deduction Rate or | %: | | |
| Loan Interest %: | | Flat/Addl Amount: | | | |
| Goal Amount: | | Current Goal Balan | ce: | | |
| | | | | | |
| This data was last updated | by | on | | | |
| Save) (Q Return to Search) | | 0 | 곌 Update/Display) (厦 | Include History) (🕱 Co | |
| Save) (Scheruin to Sealon) | | le le | Coprateroispiay) | pinologe history) (By Co | neor history |
| | | | | | |

| Step | Action |
|------|--|
| 7. | To start Union dues deduction, insert a row on the Deduction Code row. Click the Add a new row at row 1 button. |
| 8. | Enter the desired information into the *Deduction Code field. Enter "0023 ". |
| 9. | Enter the Effective Date . Click the Calendar icon button. |



| | PEOPLE | | | | | h | I () |
|---|----------------------------|--------------------|-----------------------------|------------------|----------------------------------|-----------------------|--------------|
| | | | | 🙆 Home | 📵 Worklist | 🕜 Help | 🕘 Sign Ou |
| н | ome > Compensate Employees | Maintain Payroll D | ata (USF) > <u>Use</u> > Ge | neral Deductio | n Data <u>N</u> | ew Window | |
| ſ | General Deduction Data | | | | | | |
| | BARCROFT,CHAD | | ID: | 0103 | | | |
| | Company: HE Department of | of HHS | | | | | |
| | General Deduction | | | <u>Find Vi</u> | iew All 🔋 🚺 🤉 | 2 of 2 💽 Last | |
| | *Deduction Code: 0023 | Q | | | | + - | |
| | Deduction Details | | | Find View / | All 🛛 First 🛃 1 of 1 | 🕩 Last | |
| | *Effective Date: | 01/14/2004 🗎 |] Tak | e on all Paygro | ups 🔽 | + - | |
| | Distribution Cd: | | January 🔻 | 2004 - | | | |
| | *Deduction Calculation | Default to D | S M T W T | F S It | oution Information | | |
| | Routine: | | | 1 2 3 | %: | | |
| | Deduction End Date: | | 4 5 6 7 | 3 9 10 | | | |
| | Loan Interest %: | | 11 12 13 14 1 | | | | |
| | Goal Amount: | | 18 19 20 21 2: | · · · · | ice: | | |
| | | | 25 26 27 28 2 | 3 30 31 | | | |
| | This data was last updated | by | Current Da | | | | |
| | | | | | | | |
| | Save) QReturn to Search | | | le I | ⁄ 2 Update/Display) (週 1 | nclude History) 🕼 Cor | rect History |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

| Step | Action |
|------|-------------------------------------|
| 10. | Click the desired date. Click 15 |
| | 15 |



| FODIE | | | | | 8X |
|---|---------------------------------|------------------------|---------------------|----------------------|------------------|
| 00 | | 🙆 Home | 😥 Worklist | 🕜 Help | 📀 Sig |
| ne > <u>Compensate Employees</u> > | Maintain Payroll Data (USF) > U | se > General Deduction | Data | New Window | |
| eneral Deduction Data | | | | | |
| L | | m• 0103 | | | |
| BARCROFT,CHAD Company: HE Department c | fHHS | ID: 0103 | | | |
| General Deduction | | Find Vie | w All 🛛 🛛 🖪 | 2 of 2 🕑 Last | |
| *Deduction Code: 0023 | AFGE LOCAL 1916 | | | + - | |
| Deduction Details | | <u>Find</u> View Al | l First 🗹 1 of | 1 🗈 Last | |
| *Effective Date: | 01/15/2004 | Take on all Paygrou | ps 🔽 | + - | |
| Distribution Cd: | | | | | |
| *Deduction Calculation | Default to Deduction Table | Distribu | ution Information | | |
| Routine: | , [1] | Deduction Rate or % | | 1 | |
| Deduction End Date: | | | | | |
| Loan Interest %: | | Flat/Addl Amount: | | | |
| Goal Amount: | | Current Goal Balanc | e: | | |
| This data was last updated | bu . | on | | | |
| This uata was last upuateu | ыу | 01 | | | |
| Save) QReturn to Search) | | æ | 🛙 Update/Display) 🔏 | 🛙 Include History) 🕼 | Correct History) |
| | | | | | |
| | | | | | |
| | | | | | |

| Step | Action |
|------|---|
| 11. | Click the Save button. |
| 12. | To stop Union dues deductions, insert a row on the most effective-dated row for the applicable deduction. Click the Add a new row at row 1 button. |
| 13. | Enter the Effective Date. Click the Calendar icon button. |



| PEOPLE | | | | 1 | X< |
|--|-----------------------------|------------------|---------------------------|------------------------|-----------------|
| | | 🙆 Home | 📵 Worklist | 🕜 Help | 🕘 Sig |
| ne > <u>Compensate Employees</u> > <u>Maintain Payroll Data (L</u> | <u>SF)</u> > <u>Use</u> > (| General Deducti | ion Data | New Window | |
| Seneral Deduction Data | | | | | |
| | | | | | |
| BARCROFT,CHAD | ID: | 0103 | | | |
| Company: HE Department of HHS | | | | | |
| General Deduction | | Find | <u>View All 👘 First</u> 🔳 | 2 of 3 🕨 Last | |
| *Deduction Code: 0023 AFGE LOCAL 1916 | | | | + - | |
| Deduction Details | | Find View | v All First 💽 1 of | 2 🕨 Last | |
| *Effective Date: 01/14/2004 | Ta | ike on all Paygr | | + - | |
| Distribution Cd: | | x | 1 | | |
| | nuary 🗾 | 2004 💌 | ibution Information | | |
| *Deduction Calculation Default to D | M T W | TFS | | | |
| Deduction End Date: | | 1 2 3 | %: | | |
| 4 | 567 | 8 9 10 | | | |
| | 12 13 14 | | | | |
| Goal Amount: | 19 20 21 | | nce: | | |
| 25 | 26 27 28 | 29 30 31 | | | |
| This data was last updated by Online O | | | 01/14/2004 | | |
| | Current E | Date 🕑 | | | |
| Save QReturn to Search | | | (2 Update/Display) 💋 | 🕽 Include History) 🕼 C | orrect History) |
| | | | | | |
| | | | | | |

| Step | Action |
|------|--|
| 14. | Click the Year list. |
| 15. | Select the desired Year. Click 2005 |
| 16. | Click the desired date. Click 15 |



| EOPLE | | | | | 1.C) |
|------------------------------------|---------------------------------|------------------------------|-------------------------|-----------------|--------|
| 200 | | 🙆 Home | 😥 Worklist | 🕜 Help | 😔 Sign |
| ne > <u>Compensate Employees</u> > | Maintain Payroll Data (USF) > U | <u>se</u> > General Deductio | n Data | New Window | |
| eneral Deduction Data | | | | | |
| BARCROFT,CHAD | | ID: 0103 | | | |
| Company: HE Department o | fHHS | | | | |
| eneral Deduction | | Find Vi | <u>ew All 🛛 First</u> 🗹 | 🛛 2 of 3 🕨 Last | |
| *Deduction Code: 0023 | AFGE LOCAL 1916 | | | + - | |
| Deduction Details | | Find View # | 📶 🛛 First 🛃 1 o | of 2 🕨 Last | |
| *Effective Date: | 01/15/2005 🗐 | Take on all Paygro | ups 🗹 | + - | |
| Distribution Cd: | | | | | |
| *Deduction Calculation | Default to Deduction Table | ▼ Distrit | oution Information | | |
| Routine: Deduction End Date: | 1 | Deduction Rate or | %: | - | |
| Loan Interest %: | | Flat/Addl Amount: | | | |
| Goal Amount: | | Current Goal Balan | ce: | | |
| | - | on | 01/14/2004 | | |
| This data was last updated | hw Online Opr | | | | |

| Step | Action |
|------|--|
| 17. | Enter the Deduction End Date . This must be equal to the Effective Date . Click in the Deduction End Date field. |
| 18. | Enter the desired information into the Deduction End Date field. Enter "01/15/2005". |
| 19. | Press [Tab]. |
| 20. | Click the Deduction Stop Reason list. |
| 21. | Enter the type of action being processed. Click Union Due Stop - Union Request Union Due Stop - Union Request |
| 22. | Changes to Union dues deductions amounts do not require any action by the User. These changes are processed automatically by the Union Mass. Click the Save button. |
| 23. | The Union dues start/stop information is saved. End of Procedure. |

Mask Actions

The ability to change large amounts of data, as well as key sizable repetitive workloads, reduces processing time and increases operational efficiency.

An EHRP enhancement, Mass Mask Actions, helps users minimize manual keying of changes. Mass Mask virtually eliminates the need to key DHHS specific actions (the 9xxx Nature of Action Codes). The 9xxx NOAs constitute approximately 40% of keying necessary to process personnel actions in DHHS.

This enhanced capability includes two kinds of processing:

- Mass Actions - which make the same changes to large groups of records without manual keying.

- Mask Actions - which holds certain information constant for large groups of records while only the data that is different is manually keyed.

Awards Mask

Introduction

Users may enter cash and time-off awards more efficiently for their employees by using the Awards Mask capability. This facility allows a user to enter data and initiate a process to Run that will automatically update the employee record.

NOTE: The user must enter similar award types with the same effective date. For example, a user would use the Awards Mask capability to process a group of individual cash awards with an effective date of 04/18/03.

NOTE: Users may also enter an award directly into an employee record. A User might choose to enter the data directly when there are only a few to process.

Procedure

The following steps detail the procedure for processing awards using the Mask Capability functionality.



| | 🙆 Home | 😥 Worklist | 🕜 Help | 😔 Sign |
|-----------------------|--------|------------|--------|--------|
| ne | | | | |
| Develop Workforce | | | | |
| Administer Workforce | | | | |
| Compensate Employees | | | | |
| Monitor Workplace | | | | |
| Define Business Rules | | | | |
| Self Service | | | | |
| He Process Menu | | | | |
| Help PoC Online | | | | |
| | | | | |
| PeopleTools | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|---|
| 1. | Click the He Process Menu link. ➡ He Process Menu |
| 2. | Click the HHS Custom Processes link. |
| 3. | Click the MassMask link. [■] MassMask |
| 4. | Click the Employee Awards link. Employee Awards |



| | 👌 Home | 📵 Worklist | 🕜 Help | \varTheta Sign Ot |
|--|------------|------------|------------|-------------------|
| iome > <u>He Process Menu</u> > <u>HHS Custom Processes</u> > <u>MassMask</u> > Emplo | yee Awards | | New Window | |
| Employee Awards | | | | |
| Find an Existing Value | | | | |
| Run Control ID: | | | | |
| Case Sensitive | | | | |
| 🗆 Include History 🔲 Correct History | | | | |
| Search Clear Basic Search | | | | |
| dd a New Value | | | | |
| lo matching values were found. | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|--|
| 5. | Enter the desired information into the Run Control ID field. Enter "CASHAWD". |
| 6. | Click the Search button. |



| PEOPLE | | | l | 1. Altor |
|--|--------------------------------------|------------------|----------|-------------------|
| 201- | 🙆 Home | 😥 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > <u>He Process Menu</u> > <u>HHS Custom Processes</u> > <u>Mas</u> | ssMask > Employee Awards | Ne | w Window | |
| Femployee Awards | | | | |
| Run Control ID: CASHAW/D | Report Manager Proces | s Monitor Run | | |
| Award Type: | Effective | Date: 01/16/2004 |] | |
| | | | | View. |
| *EmpliD Name | *Amount Award Earnings Group Date | End Remark | | |
| 1 | | i) | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Save) | | | E Add | 🖉 Update/Display) |
| | | | | |
| | | | | |
| • | | | | • |

| Step | Action |
|------|--|
| 7. | Select the Award Type. Click the Award Type list. |
| 8. | Select the desired Award Type. Click Individual Cash Award Individual Cash Award |
| 9. | Enter the Effective Date of the action group. Click the Choose a date button. |

The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

Ð



| PEOPLE | | | | 1 | |
|---|----------------------|---------------------------------|---------------------|---|--|
| 200 | | 🙆 Home | 😥 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > He Process Menu > HHS Custom Processes > M | <u>MassMask</u> > Ei | nployee Awards | | <u>New Window</u> | |
| Run Control ID: CASHAWD | <u>Report N</u> | lanager <u>Process M</u> | onitor Run | | |
| Award Type: Individual Cash Award | | Effective Da | te: 01/17/2004 | | x |
| | | | | January | 2004 💌 |
| *EmpliD Name | *Amount | Award Earnings En Group Date | d _{Remark} | SMTW | TFS |
| 1 | | | | 4 5 6 1 11 12 13 14 18 19 20 2 25 26 27 21 | 4 15 16 17 1 22 23 24 3 29 30 31 |
| Save) | | | | E∎Add |) (곈Update/Display) |
| < | | | | | • |

| Step | Action |
|------|--|
| 10. | Click the desired date. Click 19 |
| | |



| PEOPLE | | | | l | |
|--|------------------------|----------------------|------------|-----------|-------------------|
| 201- | 6 | Home I | 😥 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > <u>He Process Menu</u> > <u>HHS Custom Processes</u> > <u>Massi</u> | <u>Mask</u> > Employee | e Awards | <u>N</u> | ew Window | |
| / Employee Awards | | | | | |
| Run Control ID: CASHAWD | <u>Report Manager</u> | Process Mon | itor Run |] | |
| Award Type: Individual Cash Award | | Effective Date: | 01/19/2004 | Ē | |
| | | | | | View. |
| *EmpliD Name */ | Amount Award Group | Earnings End Date | Remark | | |
| 1 | | in in | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| B Save | | | | -Add | 🖉 Update/Display) |
| | | | | | |
| 4 | | | | | Þ |

| Step | Action |
|------|-----------------------------|
| 11. | Click in the *EmplID field. |
| | |



The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

| Step | Action |
|------|---|
| 12. | Enter the desired information into the *EmplID field. Enter "0079 ". |
| 13. | Press [Tab]. |
| 14. | Enter Award Amount (hours or dollars). Enter the desired information into the *Amount field. Enter "300.00". |
| 15. | If applicable, enter the Award Group indicator. |
| 16. | For Time-Off Awards, enter the Earnings End Date. |
| 17. | Click in the Remark field. |
| 18. | Enter remarks if applicable. This remark will be loaded as a "ZZZ" remark for cash awards. For Time-Off Awards, the remark will be a "T29". Enter the amount of hours for the award. Enter the desired information into the Remark field. Enter "ZZZ". |



| Step | Action |
|------|---|
| 19. | Click the Add a new row button to insert another employee's award information. Click the Add a new row at row 1 button. |
| 20. | Continue to repeat the process until all employees have been entered. To save time, these steps will be completed for you. |
| 21. | When all the employees' data has been entered, click the Run button. Click the Run button. |

| PEOPLE | | | | | | | là | |
|---|---------------------------|------------------------------------|--------------------------------|---------|-----------------|-------------------|----|------------|
| 200- | | | 🙆 н | ome | 健 Worklist | 🕜 Help | | 🕘 Sign Out |
| <u>Home</u> > <u>He Process M</u> | enu > <u>HHS Custom P</u> | rocesses > <u>Ma</u> | <u>assMask</u> > Employee A | wards | | <u>New Window</u> | | Saved |
| Process Schedule | er Request | | | | | | | |
| User ID: | 80A88IDY | | Run Control ID: | CASHAWD | | | | |
| Server Name: Recurrence: Time Zone: | | Run Date: Run Time: Reset to | 01/16/2004 | ī. | | | | |
| Process List | | | | | | | | |
| Select Description | | rocess Name IE_AWARDS | Process Type Application En | | *Type (None) | *Format (None) | • | |
| OK Cancel | I | | | | | | | |

| Step | Action |
|------|--|
| 22. | Click the Server Name list. |
| 23. | Select the PSUNX server. |
| 24. | Click the Ok button. |
| 25. | Note the Process Instance number, located below the Run button on the Employee Awards MassMask page. |

| PEOPLE | | | | 1 | A CO |
|---------------------------|-----------------------------------|---|---------------------|----------------------|----------------------|
| 000 | | 🙆 Home | 😥 Worklist | 🕜 Help | 😔 Sign Out |
| Home > <u>He Proces</u> : | s Menu > <u>HHS Custom Proces</u> | ses > <u>MassMask</u> > Employee Awards | <u>N</u> | ew Window | |
| Employee Award: | <u>s</u> | | | | Saved |
| Run Control ID |): CASHAWD | Report Manager Process | | | |
| - | | | ess Instance:203080 | | |
| Award Type: | Individual Cash Award | Effective I | Date: 01/19/2004 | 1 | |
| | | | | View All Fi | rst 🖪 1-2 of 2 🕨 |
| *EmpliD | Name | *Amount Remark | | | |
| 1 0079 | 🔍 Sullivan,Evan | 300.000 ZZZ | | | + |
| 2 0046 | I HILL,ZELDA | 200.000 ZZZ | | | + |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| 📳 Save | | | 📑 Add) 🖉 Up | date/Display) 🔏 Incl | ude History) 🕼 Corre |
| | | | | | |
| | | | | | |
| • | | | | | Þ |

| Step | Action |
|------|--|
| 26. | Click the Process Monitor link. |

If an action is in progress when the process is run, the Mask will insert a row at the most current processed or corrected row. When the action in progress is completed, it is the HR Processors responsibility to modify the rows as applicable.

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.

| Step | Action |
|------|--|
| 27. | Be sure the Process HE_AWARDS shows a Run Status of "Success". A Run Status of "Success" demonstrates that the process has completed. End of Procedure. |

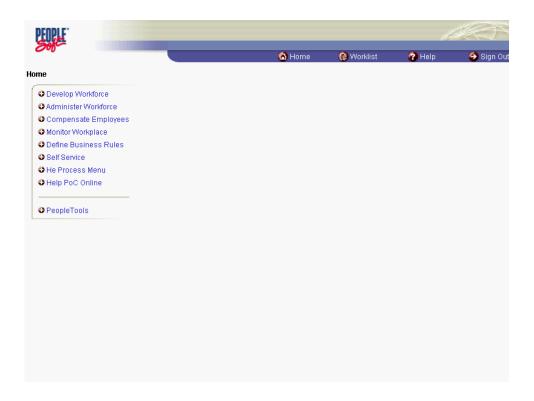
Health Benefits Mask

Introduction

Users may enter start/change health benefit actions more efficiently for their employees by using the Health Benefits Mask capability. This allows a user to enter data and initiate a process that will automatically update the employee's health benefits record. This functionality will be particularly helpful during Federal Employees Health Benefits (FEHB) Open Season. NOTE: Users can still enter data for FEHB actions for individual employees, but Par Actions are not keyed. The data is entered on the Health Benefits page.

Procedure

The following steps detail the procedure for processing Health Benefits using the Mask functionality.



Training Guide Mass/Mask Actions



| Step | Action |
|------|--|
| 1. | Click the He Process Menu link. |
| 2. | Click the HHS Custom Processes link. |
| 3. | Click the MassMask link. |
| 4. | Click the Health Benefit Mask link. Health Benefit Mask |

| PEOPLE | | | | 13/27 |
|---|---|------------|------------|------------|
| 000 | 🙆 Home | 😥 Worklist | 🕜 Help | 😔 Sign Out |
| Home > He Process Menu > HHS Custom Processes | > <u>MassMask</u> > Health Benefit Mask | | New Window | |
| Health Benefit Mask | | | | |
| Find an Existing Value | | | - | |
| Run Control ID: | | | | |
| Case Sensitive Search Advanced Search | | | | |
| Add a New Value | | | | |
| <u>Add a New Yalde</u> | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|--|
| 5. | Enter the desired information into the Run Control ID field. Enter " FEHB ". |
| 6. | Click the Search button. |



Ð

| Image: Non-organization Image: Non-organizatio Image: Non-organizatio |
|---|
| Heath Benefit Mask Run Control ID: FEHB Report Manager Process Monitor Run NOA Code: 962 NOA Code Ext: 0 Effective Date: 01/22/2004 Im View All First I or 1 ID: Last 'EmpliD Name Plan Coverage Type Benefit Plan Coverage Code Code Code |
| Run Control ID: FEHB Report Manager Process Monitor Run NOA Code: 962 NOA Code Ext: 0 Effective Date: 01/22/2004 1 View All First I or 1 Last 'EmpliD Name Plan Type Benefit Plan Code Coverage Code |
| NOA Code: 962 NOA Code Ext: 0 Effective Date: 01/22/2004 E View All First 1 of 1 D Last 'EmpliD Name Plan Benefit Plan Coverage Code |
| View All First I or 1 Last "EmpliD Name Plan Type Benefit Plan Code Coverage Code |
| *EmpliD Name Plan Benefit Plan Coverage Code |
| Type Benefit Plan Code |
| |
| |
| |
| |
| |
| |
| (日 Save) (圏-Add) (週 Update/Display) |
| |
| |

| Step | Action |
|------|---|
| 7. | Enter the Effective Date for the action group. (This date will be populating the |
| | Coverage Begin Date, Deduction Begin Date and the Election Date fields on the |
| | Health Benefits page.) |
| | NOTE: The Effective Date of the action group applies to all employees included in |
| | the mask. |
| | Click the Choose a date button. |
| | |

The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.



| PEOPLE | | | | | 1 | |
|--|------------------------|-----------------------|---------------------------|--------------------------------|-----------|------------|
| 000- | | | 🙆 Home | 😥 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > <u>He Process Menu</u> >) / Heath Benefit Mask _ | HHS Custom Processes > | • <u>MassMask</u> > I | lealth Benefit Mask | N | ew Window | |
| Run Control ID: FEHB | | <u>Report</u> | Manager Process M | Monitor Run |] | |
| NOA Code: 962 N | IOA Code Ext: 0 | Effective Da | ate: 01/22/2004 🗊 | | | |
| | | | View All | January 💌 | 2004 💌 | |
| *EmpliD | Name | Plan Type Bene | fit Plan Coverage Code | SMTWT | F S | |
| 1 | | | Q Q | | 8 9 10 | |
| | | | | 11 12 13 14 1 18 19 20 21 2 | | |
| | | | | 25 26 27 28 2 | | |
| | | | | Current Da | ite 🕨 | |
| (B Save) | | | (| 특+Add) 🔏 Update/Disg | olay) | |
| | | | | | | |

| Step | Action |
|------|-------------------------------------|
| 8. | Click the desired date. Click 26 |



Q

| EOPLE | | | | 1 | <i>#</i> << |
|----------------------------|--------------------------------|--|----------------------|-----------|-------------|
| | | 🙆 Home | 😥 Worklist | 🕜 Help | \varTheta S |
| e > <u>He Process Me</u> r | nu > <u>HHS Custom Process</u> | <u>ses</u> > <u>MassMask</u> > Health Benefit Mask | <u>N</u> | ew Window | |
| ath Benefit Mask \ | _ | | | | |
| Run Control ID: FEH | HB | Report Manager Process M | tonitor Run |] | |
| NOA Code: 962 | NOA Code Ext: 0 | Effective Date: 01/26/2004 | | | |
| | | View All F | irst 🛃 1 of 1 🕨 L | ast | |
| *EmplID | Name | Plan Benefit Plan Coverage Type Code | | | |
| 1 | ٩ | | + - | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | _ | |
| Save | | ([| 🕂 Add) 🖉 Update/Disj | play) | |
| | | | | | |
| | | | | | |

| Step | Action |
|------|------------------------------------|
| 9. | Click in the *EmplID field. |
| | |

The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

| Step | Action |
|------|--|
| 10. | Enter the desired information into the *EmplID field. Enter "0079 ". |
| 11. | Click in the Plan Type field. |
| 12. | Enter the desired information into the Plan Type field. Enter "10". |
| 13. | Press [Tab]. |
| 14. | Enter the Benefit Plan (Carrier code) Enter the desired information into the Benefit Plan field. Enter " 10 ". |
| 15. | Press [Tab]. |
| 16. | Enter the desired information into the Coverage Code field. Enter "2". |
| 17. | Click the Add a new row button to insert another employee's health benefit information. Click the Add a new row at row 1 button. |

Training Guide Mass/Mask Actions



| Step | Action |
|------|---|
| 18. | Continue to repeat the process until all employees have been entered. To save time, these steps will be completed for you. |
| 19. | When all employees' data has been entered, click the Run button. Click the Run button. |

| PEOP | E. | | | | là. | |
|------------------------|---------------------------|------------------------------|----------------------------------|------------|------------|------------|
| 00 | | | 🙆 Home | 📵 Worklist | 🕜 Help | 🕘 Sign Out |
| <u>Home</u> > <u>H</u> | He Process Menu > HHS Cus | tom Processes > <u>MassM</u> | <u>ask</u> > Health Benefit Mask | | New Window | |
| Process | s Scheduler Request | | | | | Saved |
| User IC | BOASBIOM | | Run Control ID: FEHB | | | |
| Server | Name: | | 1/22/2004 | | | |
| Recurr | | | :16:54PM rent Date/Time | | | |
| Time Z Proces | | | | | | |
| Select | Description | Process Name | Process Type | *Туре | *Format | |
| | HE_HLTH_ELCT | HE_HLTH_ELCT | Application Engine | (None) 💌 | (None) 💌 👬 | |
| | | | | | | |
| | | | | | | |
| OK | Cancel | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| Step | Action |
|------|--|
| 20. | Click the Server Name list. |
| 21. | Select the PSUNIX server. Click PSUNX PSUNX |
| 22. | Click the Ok button. |
| 23. | Note the Process Instance n umber. This number is found below the Run button on the Health Benefits Mask page. |



| PEOPLE | | | | 1 | SE T |
|--|-----------------------------|--|----------------------|------------------|------------|
| | | 🙆 Home | 📵 Worklist | 🕜 Help | 🕘 Sign Out |
| ne > <u>He Process Menu</u> leath Benefit Mask _ | > <u>HHS Custom Process</u> | <u>es</u> > <u>MassMask</u> > Health Benefit M | ask <u>N</u> | <u>ew Window</u> | Saved |
| Run Control ID: FEHB | | <u>Report Manager</u> Proce | ess Monitor Run | | |
| NOA Code: 962 | NOA Code Ext: 0 | Effective Date: 01/26/2004 | <u>[]</u> | | |
| | | View All | First 🖪 1-3 of 3 🕨 L | ast | |
| *EmpliD | Name | Plan Benefit Plan Covera Type Code | je | | |
| 1 0079 | 🔾 Sullivan,Evan | 10 9 10 9 2 9 | + - | | |
| 2 0016 | WINTER, FRED | 10 🔍 10 🔍 1 🔍 | + - | | |
| 3 0047 | REED,ADAM | 10 🔍 10 🔍 2 🔍 | + - | | |
| Save) | | | (문+Add) @Update/Dis | play) | |

| Step | Action |
|------|--|
| 24. | Click the Process Monitor link. <u>Process Monitor</u> |
| 25. | Be sure the Process (HE_HLTH_ELCT) shows a Run Status of Success . A Run Status of Success demonstrates that the process has completed. End of Procedure. |

Employee Realignment Mask

Introduction

A mask template is available to Users for the initiation of an employee Realignment. The Mask process will update the employee's record and the employee's current position to reflect the new Department ID (Admin Code).

The following data will appear on the Data Control Page for the realignment action:

- Effective Date
- Action: POS (Position Change)
- Reason: REO (Reorganization/Restructure)
- NOA Code: 790 (Realignment)
- NOA Extension: 0
- Legal Authority: UNM

Procedure

The following steps detail the procedure for processing Mask employee realignments.

| Develop Workforce Administer Workforce Compensate Employees Compensate Employees Monitor Workplace Define Business Rules Self Service Help Poc Online PeopleTools | | 🙆 Home | 📵 Worklist | 🕜 Help | 🕘 Sign O |
|---|-------------------------|--------|------------|--------|----------|
| Administer Workforce Compensate Employees Monitor Workplace Define Business Rules Self Service He Process Menu Help PoC Online | ne | | | | |
| Compensate Employees Monitor Workplace Content Self Service He Process Menu Help PoC Online | O Develop Workforce | | | | |
| Monitor Workplace Define Business Rules Self Service He Process Menu Help PoC Online | Administer Workforce | | | | |
| C Define Business Rules C Self Service He Process Menu Help PoC Online | Compensate Employees | | | | |
| Self Service He Process Menu Help PoC Online | O Monitor Workplace | | | | |
| O He Process Menu O Help PoC Online | O Define Business Rules | | | | |
| C Help PoC Online | Self Service | | | | |
| | O He Process Menu | | | | |
| C PeopleTools | O Help PoC Online | | | | |
| | C PeopleTools | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

| Step | Action |
|------|--|
| 1. | Click the He Process Menu link. |
| 2. | Click the HHS Custom Processes link. |
| 3. | Click the MassMask link. |
| 4. | Click the Employee Realignments link. Employee Realignments |



| | 🙆 Home | 😥 Worklist | 🕜 Help | Sign Ou |
|---|-------------------------------------|------------|------------|---------|
| Home > <u>He Process Menu</u> > <u>HHS Custom Processes</u> > | <u>MassMask</u> > Employee Realignn | nents | New Window | |
| Employee Realignments | | | | |
| Find an Existing Value | | | | |
| Run Control ID: | | | | |
| Case Sensitive Include History Correct History | | | | |
| Search Advanced Search | | | | |
| Add a New Value | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Step | Action |
|------|---|
| 5. | Enter the desired information into the Run Control ID field. Enter " REALIGN ". |
| 6. | Click the Search button. |



| PEOPLE" | | | | | 6 | |
|------------------------------------|------------------------|--------------------------------|-----------------------------|---------------|----------------|------------|
| 200 | | | 🙆 Home | 😥 Worklist | 🕜 Help | 😔 Sign Out |
| <u>Home</u> > <u>He Process Me</u> | nu > HHS Custom Proces | sses > <u>MassMask</u> > Emplo | yee Realignmer | nts <u>Ne</u> | w Window | |
| Emp. Realignment | _ | | | | | |
| Run Control ID: RE | ALIGN | Report Mana | <u>qer</u> <u>Process M</u> | onitor Run | | |
| Effective Date: 0 | 1/22/2004 | | | | | |
| | | | New Loca | tion | | |
| *EmpliD | Name Q | *SetID *New Departu | nent Code | Authority 1 | Descr - Part 1 | Authori |
| | <u> </u> | | | | | J |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| 📳 Save | | | | | | |
| | | | | | | |
| | | | | | | |
| 4 | | | | | | • |

| Step | Action |
|------|---|
| 7. | Enter the Effective Date . (The date would be the same for all employees being realigned.) Click the Choose a date button. |

| Ð) | The Calendar icon represents a date prompt. Clicking this button will produce a pop-up |
|----|---|
| | calendar for reference. To select a specific date from the pop-up calendar as the field |
| | entry, simply click on the date. Use the arrows to move through the months and years. |



| PEOPLE | _ | | | Ka | |
|--|--|--------------------------|-----------------|------------------|------------|
| 200 | | 🙆 Home | 😥 Worklist | 🕜 Help | 🕘 Sign Out |
| Home > <u>He Process Menu</u> > <u>HHS</u> | Custom Processes > MassMask > Er | nployee Realignme | ents <u>N</u> i | ew Window | |
| Emp. Realignment | | | | | |
| Run Control ID: REALIGN | Report M | tanager <u>Process I</u> | Monitor Run | | |
| Effective Date: 01/22/2004 | <u>H</u> | | | | |
| | January 💌 2004 💌 | | | | |
| *EmpliD Name | SMTWTFS 123 | artment New Loc Code | ation Authority | 1 Descr - Part 1 | Authori |
| 1 | 4 5 6 7 8 9 10 | ٩ | ٩ | | |
| | 11 12 13 14 15 16 17 18 19 20 21 22 23 24 | | | | |
| | 25 26 27 28 29 30 31 | | | | |
| | Current Date | | | | |
| | | | | | |
| | | | | | |
| 🗐 Save | | | | | |
| | | | | | |
| | | | | | |
| 4 | | | | | Þ |

| Step | Action |
|------|-------------------------------------|
| 8. | Click the desired date. Click 26 |



| PEOPLE" | | | | | 16 | |
|----------------------------|------------------------------|-------------------------------|--------------------------|--------------------|----------------|------------|
| 000 | | | 🙆 Home | 📵 Worklist | 🕜 Help | 📀 Sign Out |
| Home > <u>He Process M</u> | enu > <u>HHS Custom Proc</u> | :esses > <u>MassMask</u> > Ei | mployee Realignme | nts <u>Ne</u> | w Window | |
| Emp. Realignment | L | | | | | |
| Run Control ID: RI | EALIGN | Report M | lanager <u>Process N</u> | <u>Aonitor</u> Run | | |
| Effective Date: | 1/26/2004 🗊 | | | | | |
| | | | New Loca | ation | | |
| *EmpliD | Name | *SetID *New De | partment Code | Authority 1 | Descr - Part 1 | Authori |
| · | | | | | | J |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| 📳 Save) | | | | | | |
| | | | | | | |
| | | | | | | |
| 4 | | | | | | • |

| Step | Action |
|------|------------------------------------|
| 9. | Click in the *EmplID field. |



The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

| Step | Action |
|------|---|
| 10. | Enter the desired information into the *EmplID field. Enter "0108 ". |
| 11. | Press [Tab]. |
| 12. | Enter the SetID of the new department to which the employee is being realigned. Enter the desired information into the *SetID field. Enter " NIH00 ". |
| 13. | Press [Tab]. |
| 14. | Enter the desired information into the *New Department field. Enter "HN252". |
| 15. | Enter the New Location Code when applicable. If this field is left blank, the old value will carry over. |
| 16. | Click in the Authority 1 Descr - Part 1 field. |

| Step | Action |
|------|--|
| 17. | Enter the description for the "UNM" legal authority that will appear on the employee's record. Enter the desired information into the Authority 1 Descr - Part 1 field. Enter " POSITION CHANGE ". |
| 18. | Press [Tab] twice to select the New Account Code field. Press [Tab] . |
| 19. | Press [Tab]. |
| 20. | Enter the new CAN if applicable. If this field is left blank the old value will carry over. Enter the desired information into the New Account Code field. Enter " 1921131R ". |
| 21. | Scroll as necessary to view the rest of the page. Click the horizontal scrollbar. |
| 22. | If desired, enter a remark in the New Description field. This will be treated as the 'ZZZ' remark. |
| 23. | Click the Add a new row button to insert another employee's information. Click the Add a new row at row 1 button. |
| 24. | Continue to repeat the process until all employees have been entered. To save time, these steps will be completed for you. |
| 25. | When all employees' data has been entered, click the Run button. Click the Run button. |



| vocess Scheduler Request User ID: SCASSIDY Run Date: 01/22/2004 Recurrence: Run Time: Reset to Current Date/Time Process List Select Description Process Name HE_REALIGN HE_REALIGN Kerel | ne > <u>He Process Me</u> | enu > <u>HHS Custom P</u> | r <u>ocesses</u> > <u>MassMas</u> | 🙆 Home <u>k</u> > Employee Realignmen | 健 Worklist | Relp New Window | Sign · Save |
|--|---------------------------|---------------------------|-----------------------------------|--|------------|-----------------|----------------|
| Server Name: Run Date: 01/22/2004 | | | R | un Control ID: REALIGN | | | Gave |
| elect Description Process Name Process Type 'Type 'Format HE_REALIGN HE_REALIGN Application Engine (None) (N | ecurrence: ime Zone: | • | Run Date: 01/2 Run Time: 3:33 | 2/2004 | | | _ |
| | elect Description | | | | | | |
| OK Cancel | I HE_REALIG | N H | E_REALIGN | Application Engine | (None) | (None) 💌 🖺 | M |
| | OK Cancel | | | | | | |
| | | | | | | | |
| | | | | | | | |

| Step | Action |
|------|---|
| 26. | Click the Server Name list. |
| 27. | Select the "PSUNX" server. Click PSUNX PSUNX |
| 28. | Click the Ok button. |
| 29. | Note the Process Instance number. (This number is found below the Run button on the Employee Realignments page) |



| p. Realignme | ss Menu > <u>HHS Custom Proces</u> | <u>ses</u> > <u>Mass</u> | <u>Mask</u> > Employee F | tealignments | | <u>New Window</u> | Sa |
|----------------|------------------------------------|--------------------------|--------------------------|--------------------------------------|-------------|---------------------------|----|
| Run Control II | D: REALIGN | | <u>Report Manager</u> | <u>Process Monito</u> Process Ins | | Run | |
| Effective Date | e: 01/26/2004 🗊 | | | Process ins | tance | 9.203082 | |
| | | | | | | | |
| *EmplID | Name | *SetID | *New Department | New Location Code | A | uthority 1 Descr - Part 1 | |
| 1 0108 | REED,GEORGE | | HN252 | | Q F | OSITION CHANGE | |
| 2 0111 | BARCROFT,GEORGE | | HN252 | | Q [F | OSITION CHANGE | |
| | | | | | | | |
| | | | | | | | |

| Step | Action |
|------|---|
| 30. | Click the Process Monitor link. |
| 31. | Be sure the process HE_ REALIGN shows a Run Status of Success . A Run Status of Success demonstrates that the process has completed. End of Procedure. |