Mass/Mask Actions
Created on April 4, 2005

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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.

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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.
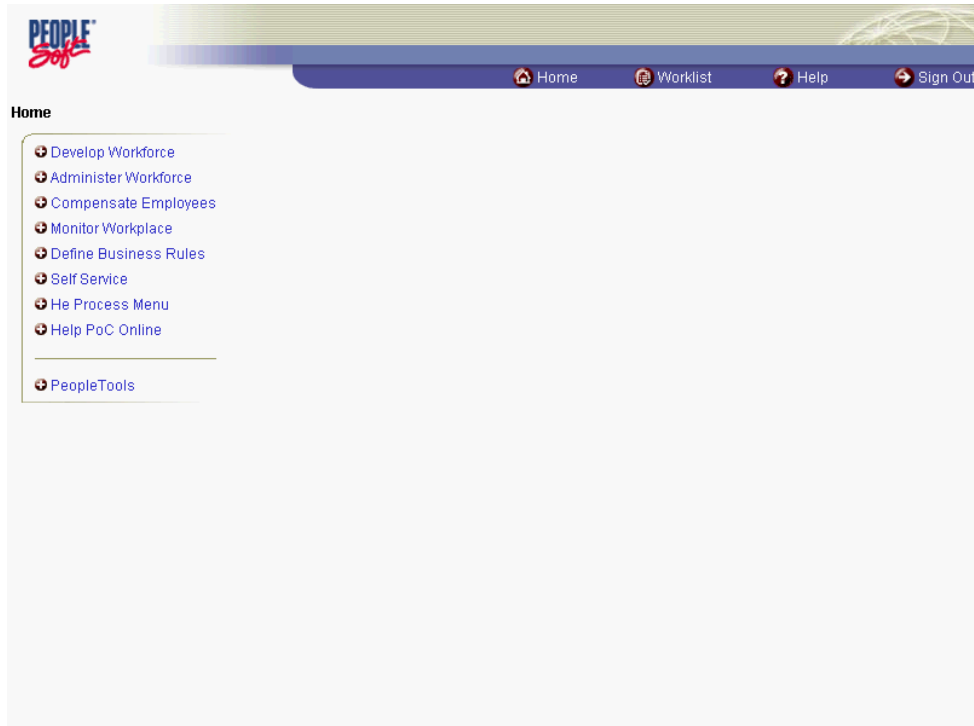
Manuel Leave Category Changes

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.

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

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**

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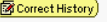
Step	Action
9.	Click the **Add a new row at row 1** button.
10.	Click the **Choose a date** button.

Step	Action
11.	Click the desired date.
	Click **19**
	19

Step	Action
12.	Click the **Choose a date** button.

Step	Action
13.	Click the desired date. Click **19** `19`

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.

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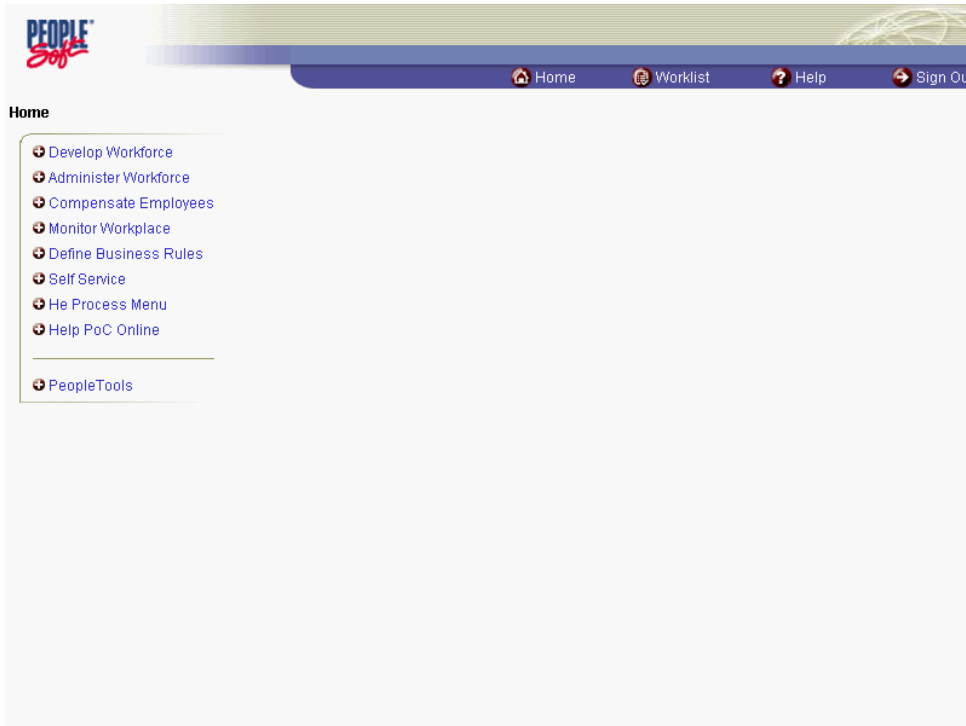
Step	Action
1.	Click the **Administer Workforce** link. ⊕ Administer Workforce
2.	Click the **Manage Performance (USF)** link. ⊕ Manage Performance (USF)
3.	Click the **Use** link. ⊕ Use
4.	Click the **Employee Appraisal** link. Employee Appraisal

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.

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

Step	Action
8.	Click the desired date. Click **15** 15

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.

PeopleSoft

Home | Worklist | Help | Sign Out

New Window

Home > Administer Workforce > Manage Performance (USF) > Use > **Employee Appraisal**

Lookup Rating Scale

Rating Scale: [ ]
Description: [ ]

[Lookup] [Clear] [Cancel] Basic Lookup
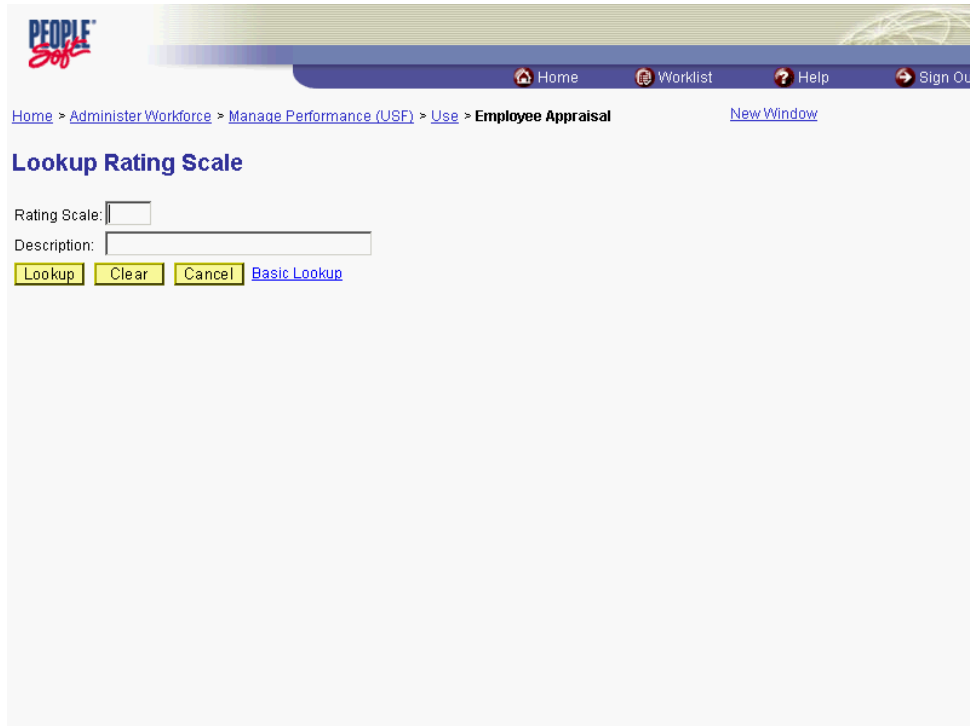
Step	Action
15.	Click the **Lookup** button. [Lookup]
16.	Select the **Rating Scale** from the list. Click **OPM Rating of Record Pattern H** [OPM Rating of Record Pattern H]

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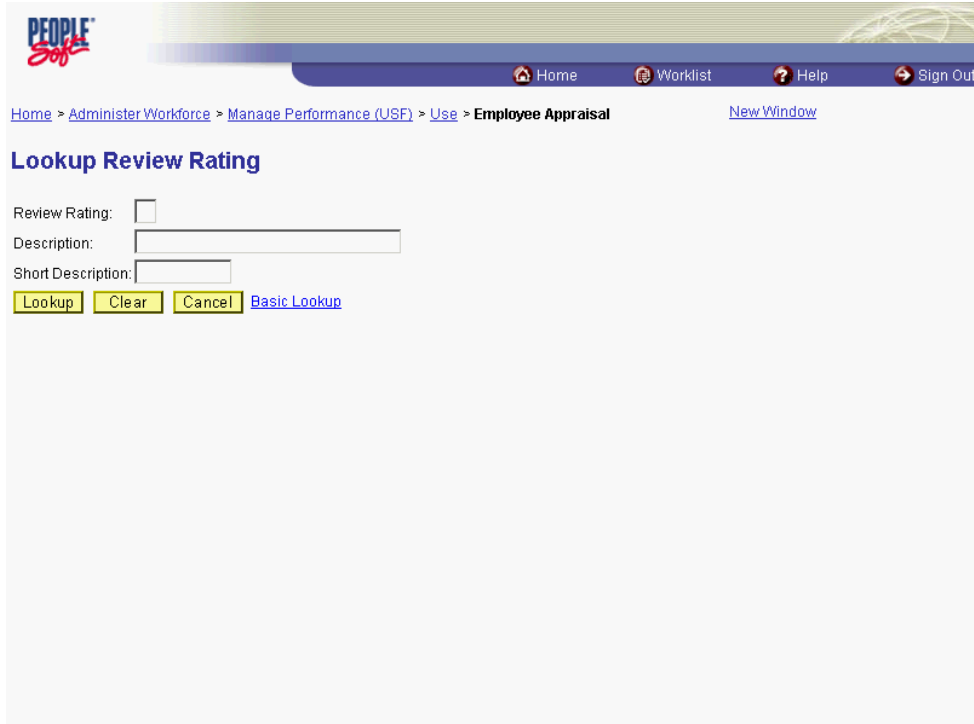
Step	Action
18.	Click the **Lookup** button.
19.	Select the **Review Rating** from the list. Click **Fully successful or equivalent**

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.
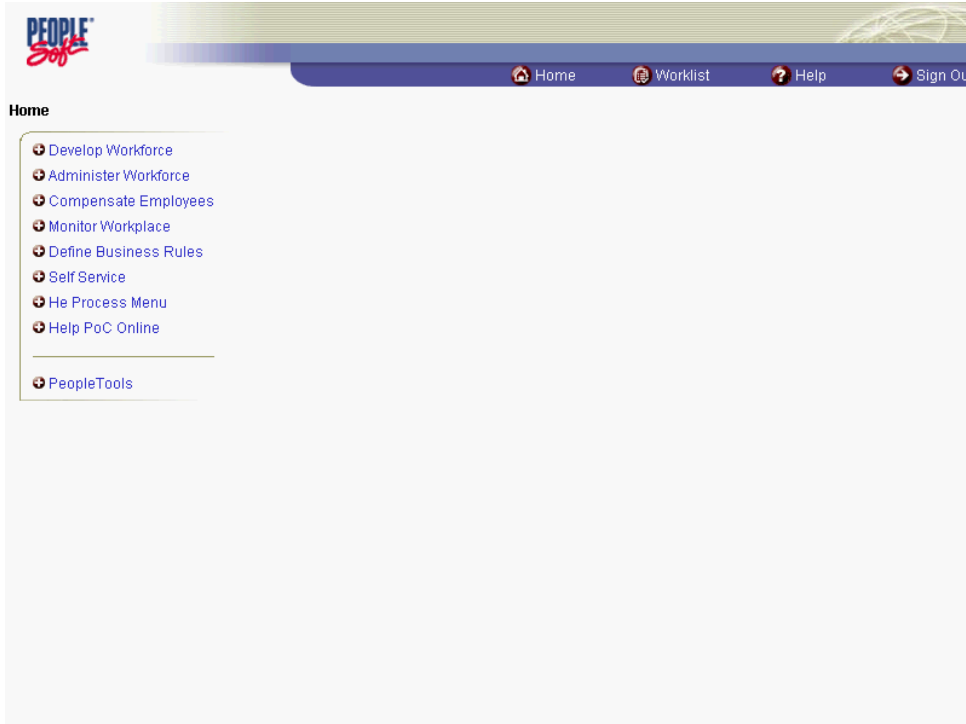
Manual Dues Start/Stop

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.

Step	Action
1.	Click the **Compensate Employees** link. ⊕ Compensate Employees
2.	Click the **Maintain Payroll Data (USF)** link. ⊕ Maintain Payroll Data (USF)
3.	Click the **Use** link. ⊕ Use
4.	Click the **General Deduction Data** link. General Deduction Data
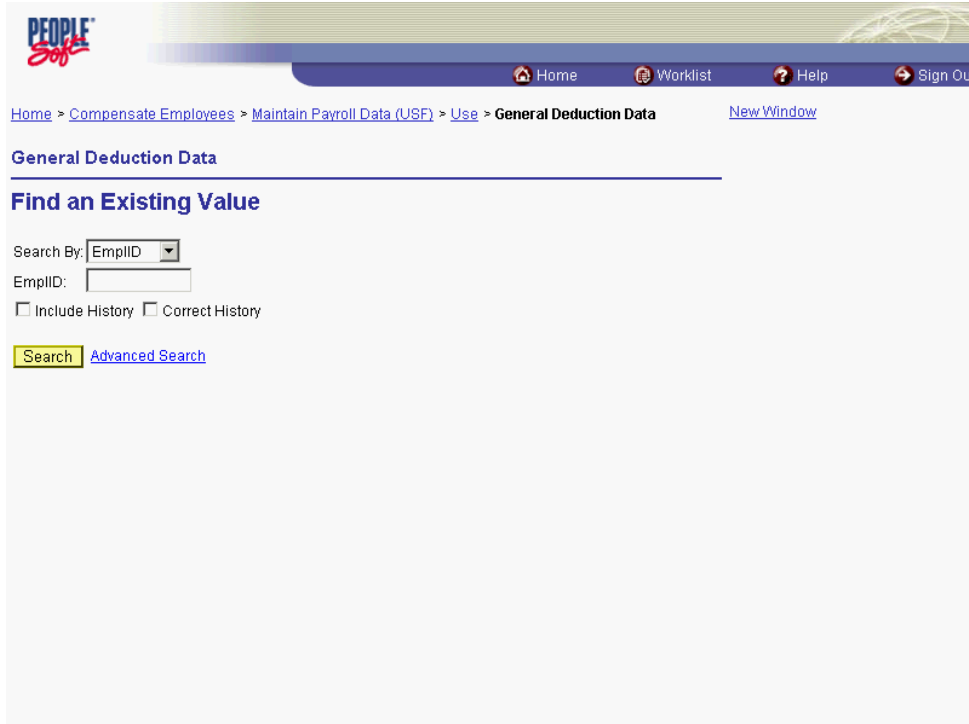
Step	Action
5.	Enter the Employee ID to pull up the employee record or click on the **Search By** list to perform a search for the employee by Name or other criteria. Enter the desired information into the **EmplID** field. Enter "**0103**".
6.	Click the **Search** button.

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.

Step	Action
10.	Click the desired date. Click **15** 15

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Step	Action
11.	Click the **Save** button. 🖫 Save
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. 📅
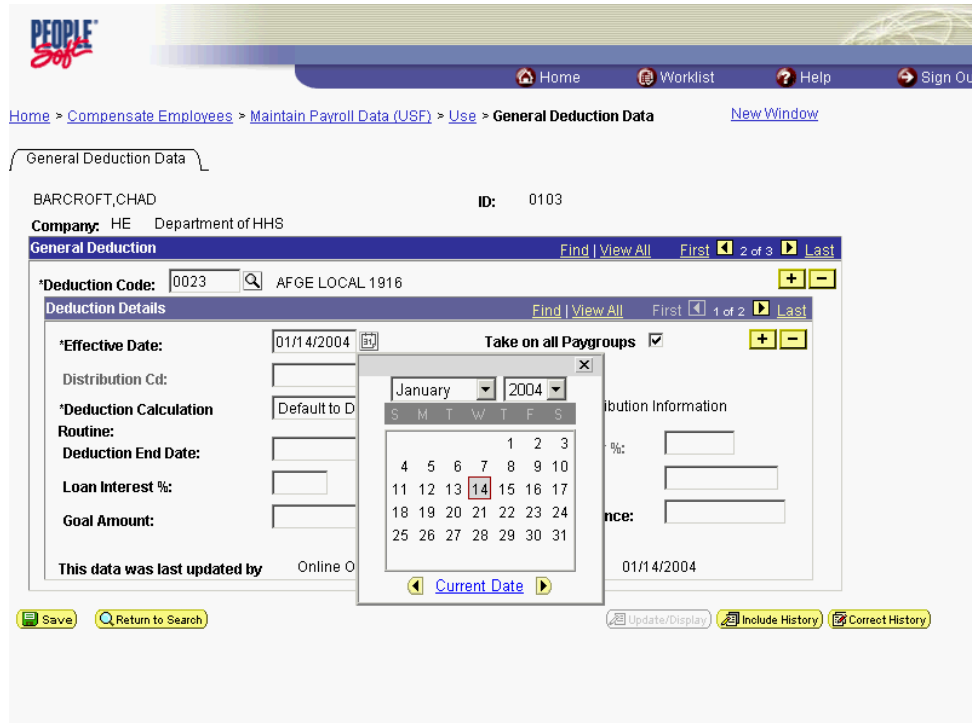
Step	Action
14.	Click the **Year** list.
15.	Select the desired **Year**. Click **2005**
16.	Click the desired date. Click **15**

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. No
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. Save
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.

Step	Action
1.	Click the **He Process Menu** link. 🔵 He Process Menu
2.	Click the **HHS Custom Processes** link. 🔵 HHS Custom Processes
3.	Click the **MassMask** link. 🔵 MassMask
4.	Click the **Employee Awards** link. Employee Awards
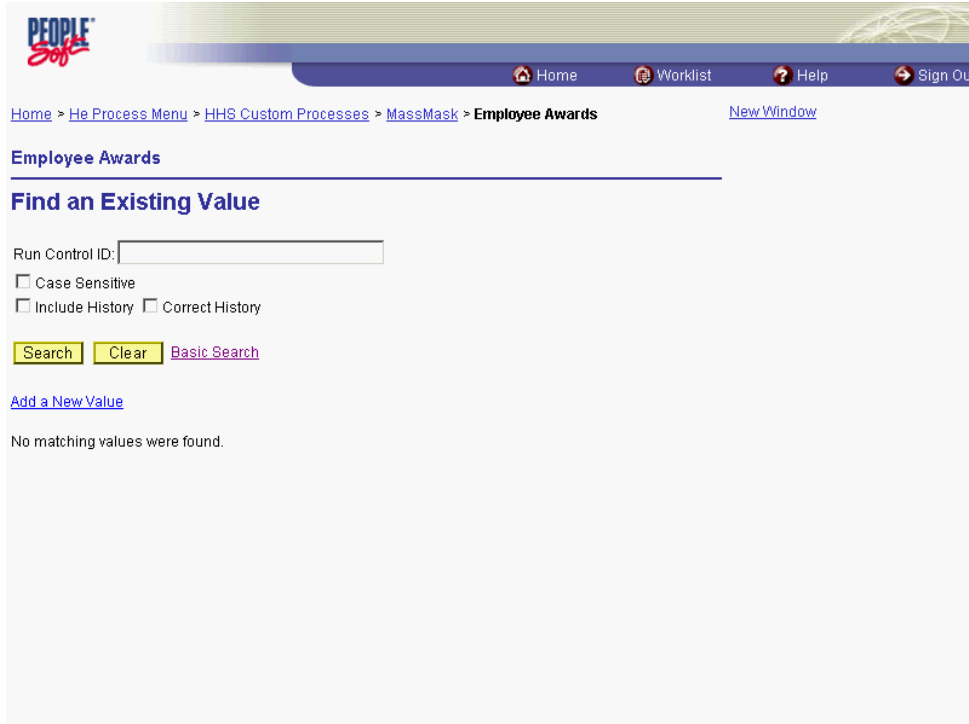
Step	Action
5.	Enter the desired information into the **Run Control ID** field. Enter "**CASHAWD**".
6.	Click the **Search** button.

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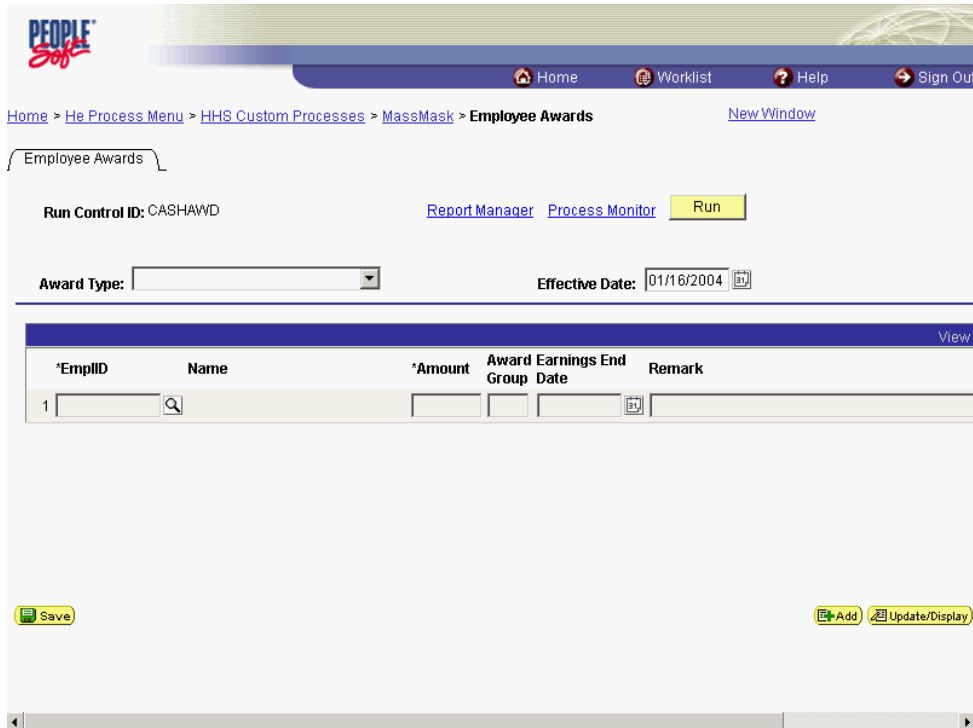
Step	Action
7.	Select the **Award Type**. Click the **Award Type** list.
8.	Select the desired **Award Type**. Click **Individual Cash Award** Individual Cash Award
9.	Enter the **Effective Date** of the action group. Click the **Choose a date** button.

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.

Step	Action
10.	Click the desired date. Click **19** 19

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

> [Look Up icon] 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.
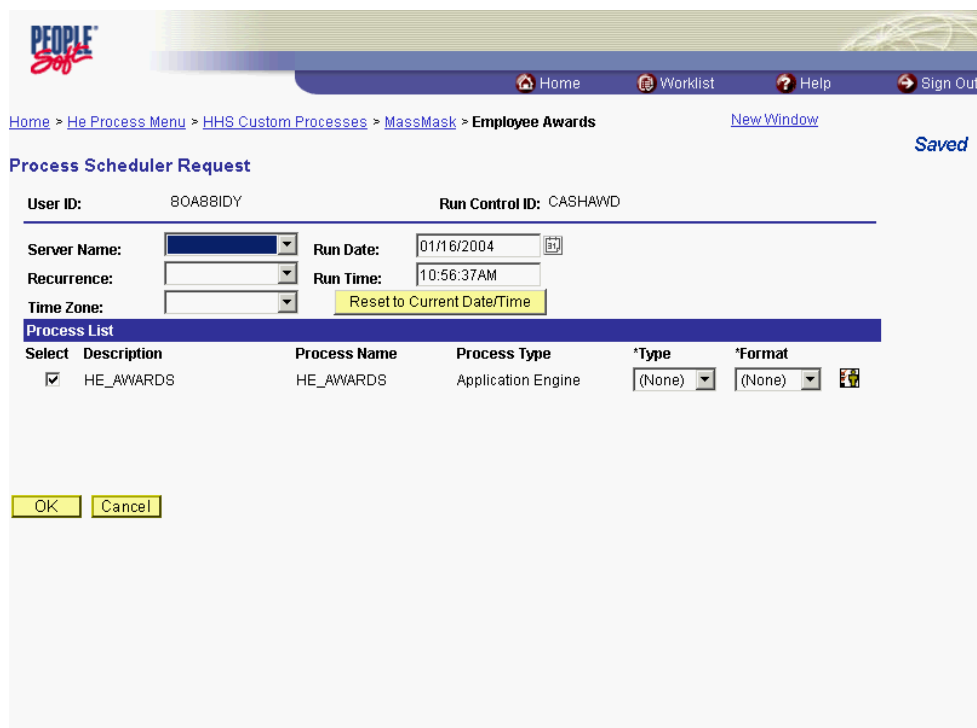
Step	Action
22.	Click the **Server Name** list.
23.	Select the **PSUNX** server.
24.	Click the **Ok** button.
25.	Note the **Process Instance** number, located below the **Run** button on the Employee Awards MassMask page.

Step	Action
26.	Click the **Process Monitor** link. Process Monitor

	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.

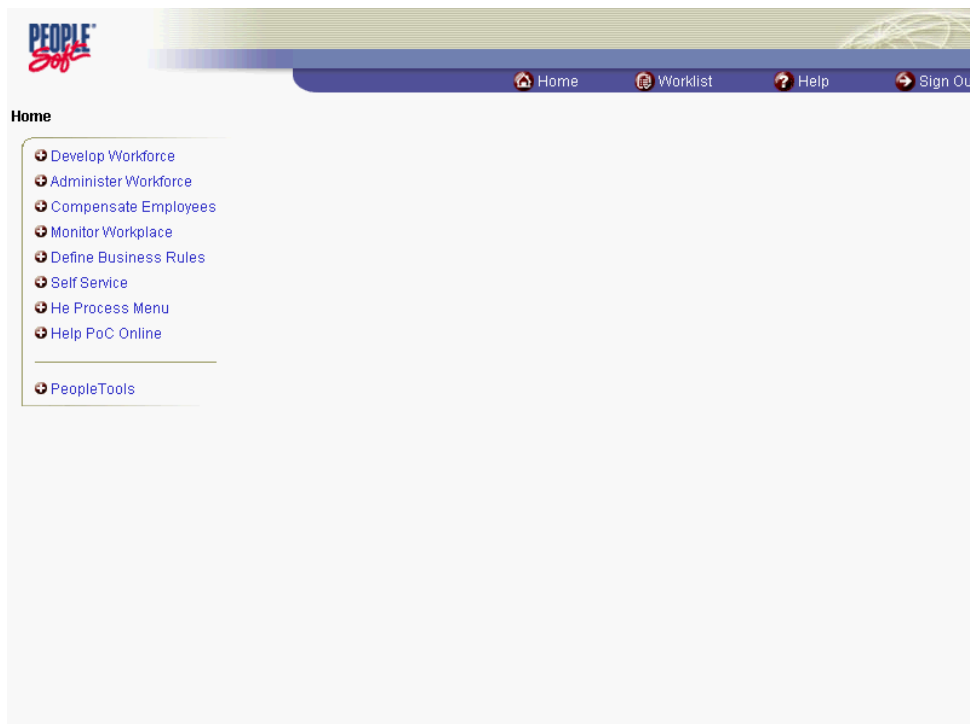| Step	Action
27.	Be sure the Process HE_AWARDS shows a **Run Status** of "Success". A **Run Status** of "Success" demonstrates that the process has completed. **End of Procedure.**

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.

Step	Action
1.	Click the **He Process Menu** link. ⊙ He Process Menu
2.	Click the **HHS Custom Processes** link. ⊙ HHS Custom Processes
3.	Click the **MassMask** link. ⊙ MassMask
4.	Click the **Health Benefit Mask** link. Health Benefit Mask
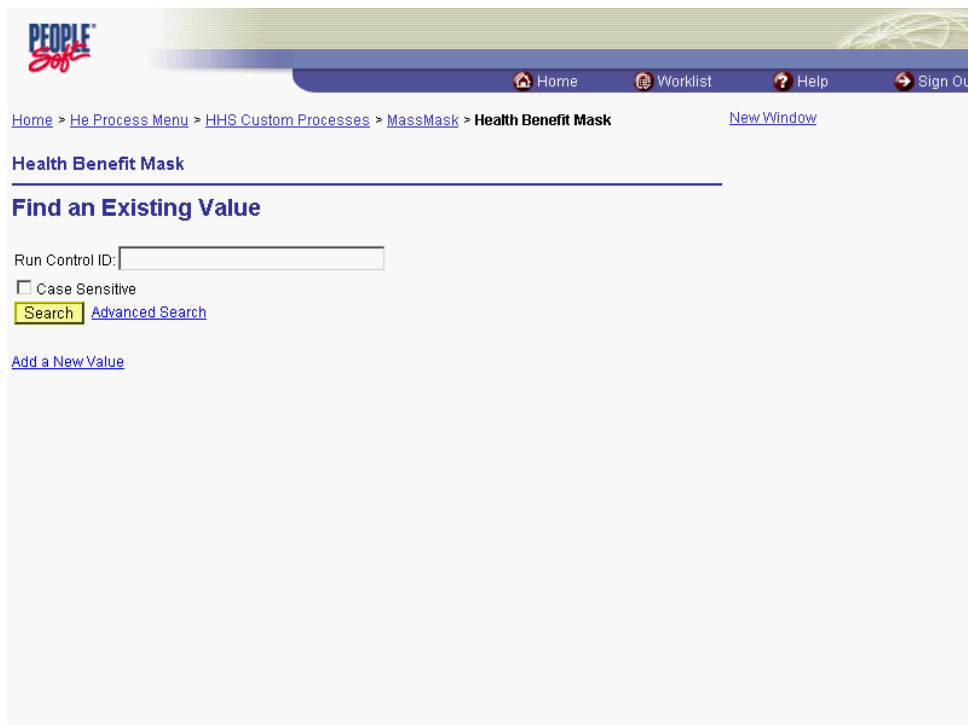
Step	Action
5.	Enter the desired information into the **Run Control ID** field. Enter "**FEHB**".
6.	Click the **Search** button. Search

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.

Step	Action
8.	Click the desired date. Click **26** 26

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.

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. `Run`
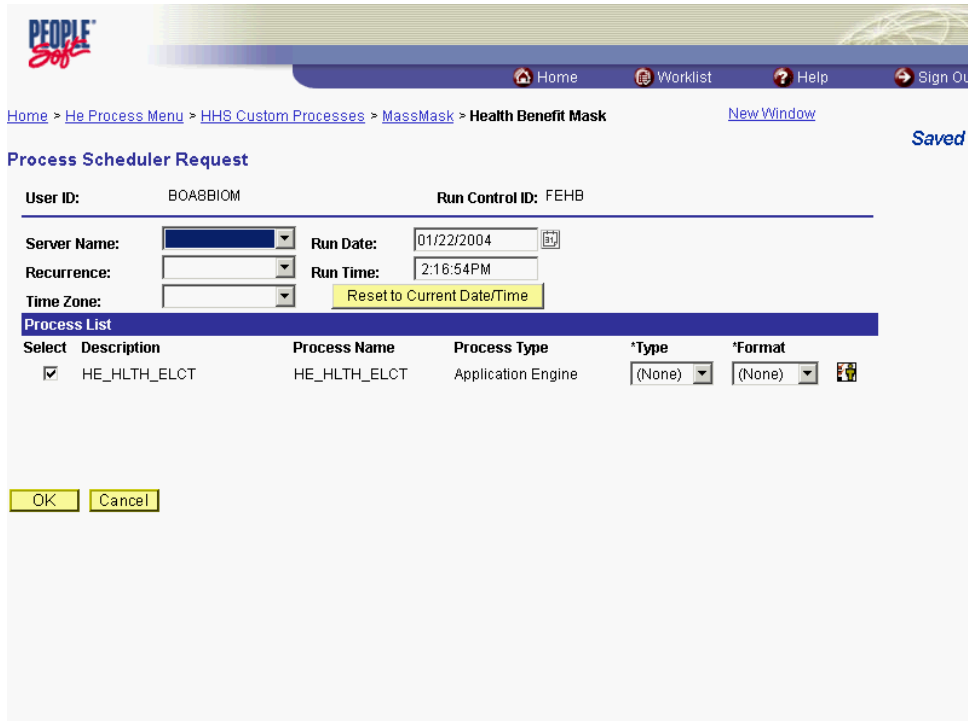
Step	Action
20.	Click the **Server Name** list.
21.	Select the **PSUNIX** server. Click **PSUNX** `PSUNX`
22.	Click the **Ok** button. `OK`
23.	Note the **Process Instance n**umber. This number is found below the **Run** button on the Health Benefits Mask page.
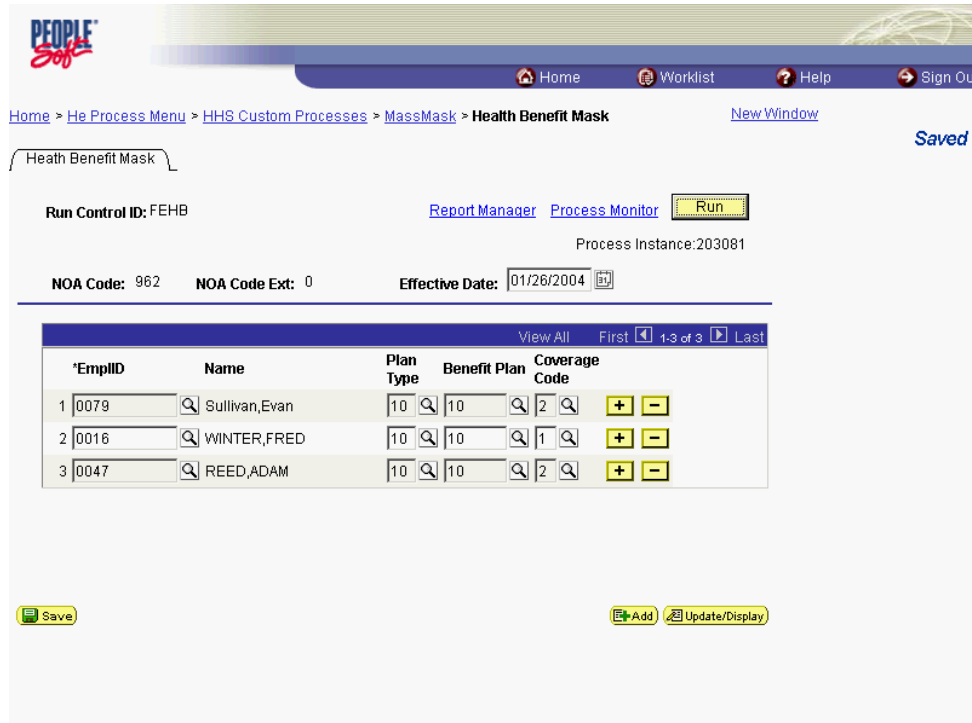
Step	Action
24.	Click the **Process Monitor** link. Process Monitor
25.	Be sure the Process (HE_HLTH_ELCT) shows a **Run Status** of **Success**. A **Run Status** of **Success** demonstrates that the process has completed. **End of Procedure.**

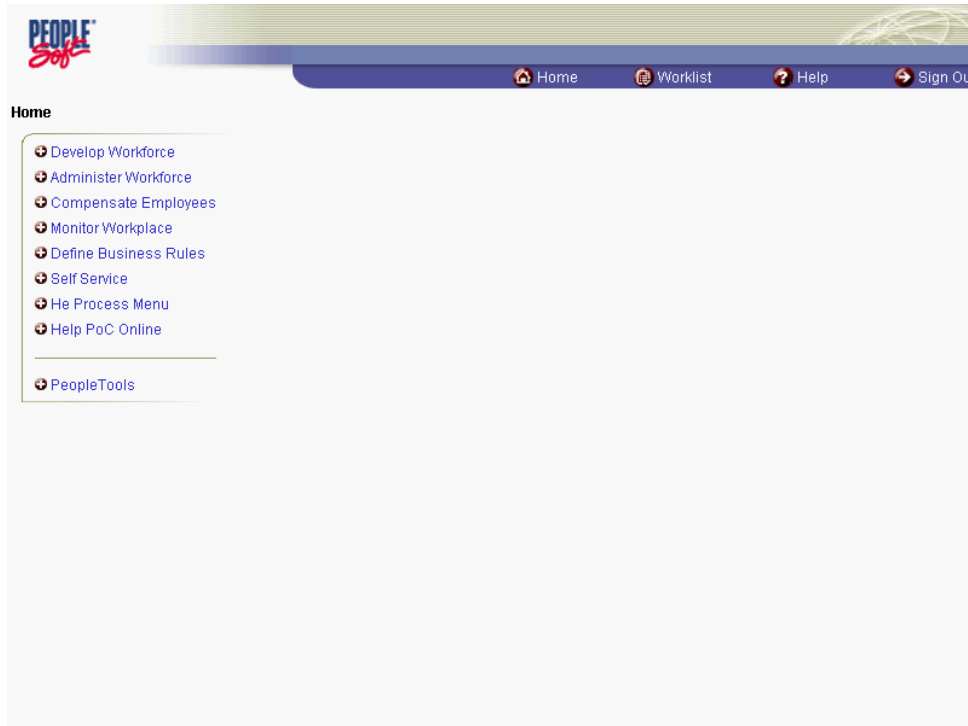## Employee Realignment Mask

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.

Step	Action
1.	Click the **He Process Menu** link. ⊕ He Process Menu
2.	Click the **HHS Custom Processes** link. ⊕ HHS Custom Processes
3.	Click the **MassMask** link. ⊕ MassMask
4.	Click the **Employee Realignments** link. Employee Realignments
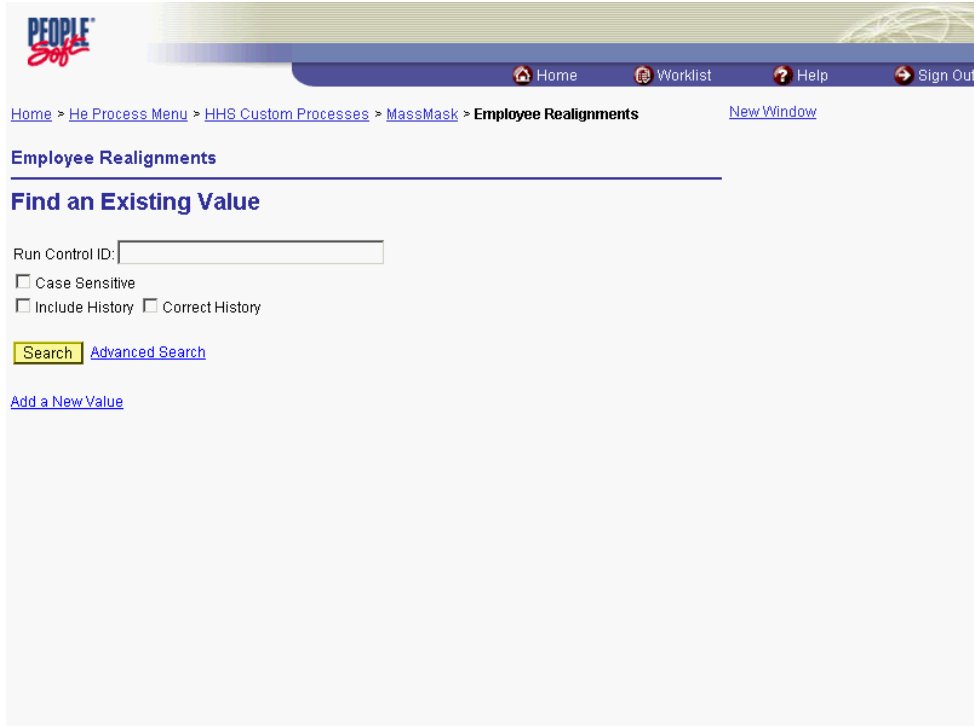
Step	Action
5.	Enter the desired information into the **Run Control ID** field. Enter "**REALIGN**".
6.	Click the **Search** button.

Step	Action
7.	Enter the **Effective Date**. (The date would be the same for all employees being realigned.) 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.

Step	Action
8.	Click the desired date. Click **26** 26

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. Run

Step	Action
26.	Click the **Server Name** list.
27.	Select the "PSUNX" server. Click **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)

Step	Action
30.	Click the **Process Monitor** link. Process Monitor
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.**