CHRIS User Guide: Award Information

Introduction

The purpose of this chapter is to provide steps for entering, correcting, and deleting information on Awards in CHRIS. The Award/One-Time Payment nature of action is to be used for individual awards for employees.

A Request for Personnel Action (RPA) is required to grant a monetary award. The award history is automatically updated in CHRIS. Some awards do not require RPAs; e.g., non-monetary suggestions, non-monetary recognition awards, etc. Awards that do not require an RPA can be updated in CHRIS by using the People Record.

Chapter Contents

Nature of Action Codes for Award/One-Time Payment

The nature of action codes are unique numerical codes that identify a particular action within the nature of action family.

The first digit of the nature of action code indicates the type of action:
100 series—Appointments
200 series—Returns to duty from nonpay
300 series—Separations
400 series—Placements in nonpay and/or nonduty status
500 series—Conversions to appointment
600 series—(reserved for Office of Personnel Management use)
700 series—Position changes, extensions, and miscellaneous changes
800 series—Pay changes and miscellaneous changes
900 series—(Reserved for use by agencies)

The second and third digits of the nature of action code indicate the particular kind of action, for example, “promotion,” “resignation,” etc.

The system generates and configures the RPA based on the NOA family information. The RPA form simplifies data entry by:

- Shading data fields to indicate where to enter data.
- Automatically entering related information based on the person and position.
- Supplying default values for Extra Information.
- Providing selected lists of values based on the NOAC.
- Automatically entering required Remarks.
- Computing pay amounts, based on the pay table, grade, step, and premium pays.

The NOA codes for **Award/One-Time Payment** are listed below.

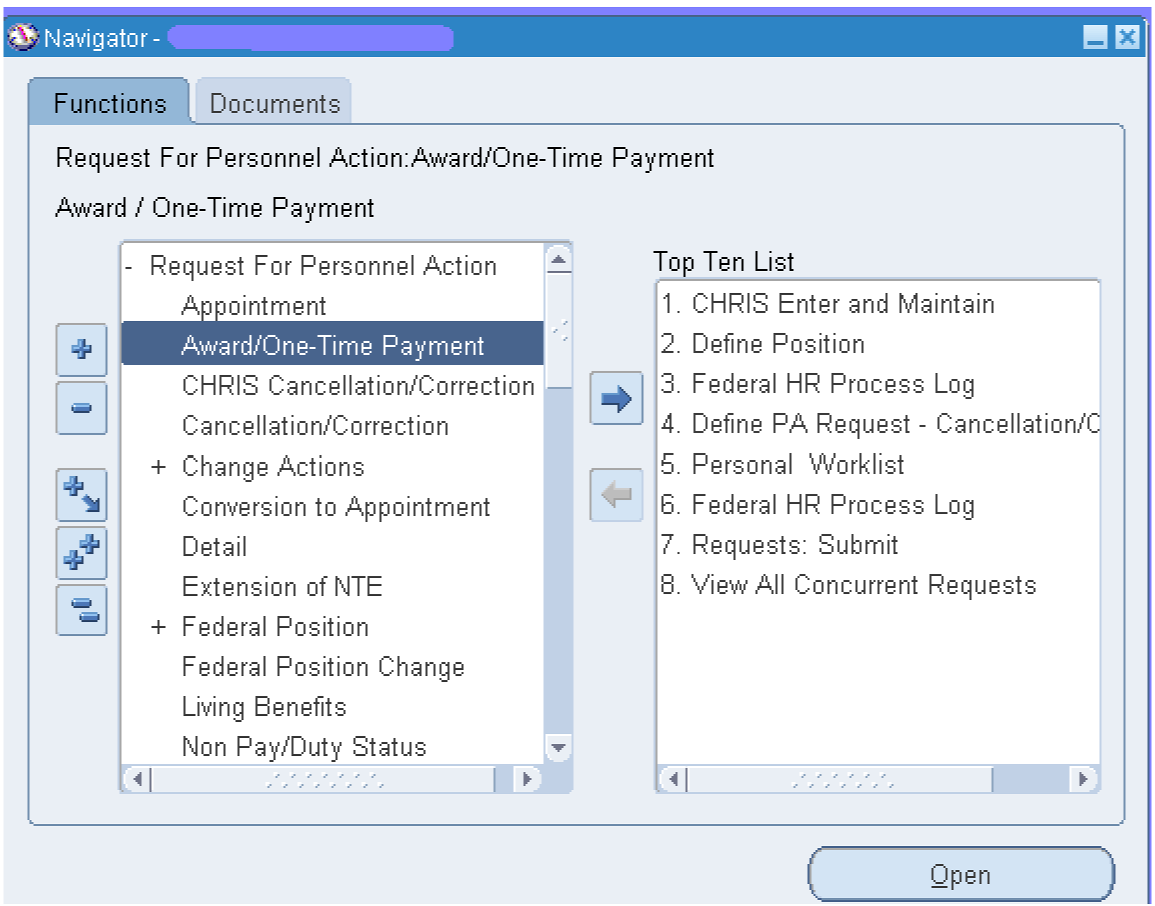
Award/One-Time Payment

Code	Description	Code	Description
815	Recruitment Incentive	816	Relocation Incentive
817	Student Loan Repayment	825	Separation Incentive
827	Retention Incentive	840	Individual Cash Award RB
841	Group Award-Chapter45	842	Ind Suggestion/Invention Award
843	Group Suggestion/Invention	844	Foreign Language Award
845	Travel Saving Incentive	846	Individual Time-Off Award
847	Group Time Off Award	848	Referral Bonus
849	Individual Cash Award NRB	878	Presidential Rank Award
879	SES Performance Award	889	Group Award – Other
885	Lump Sum Performance Payment - RB ILPA		
886	Lump Sum Performance Payment - RB NILPA		
887	Lump Sum Performance Payment - NRB		

STEP ONE COMPLETING THE RPA FOR A MONETARY AWARD

Entering a Monetary Award Using an RPA
This procedure provides steps to initiate the RPA for a monetary award.

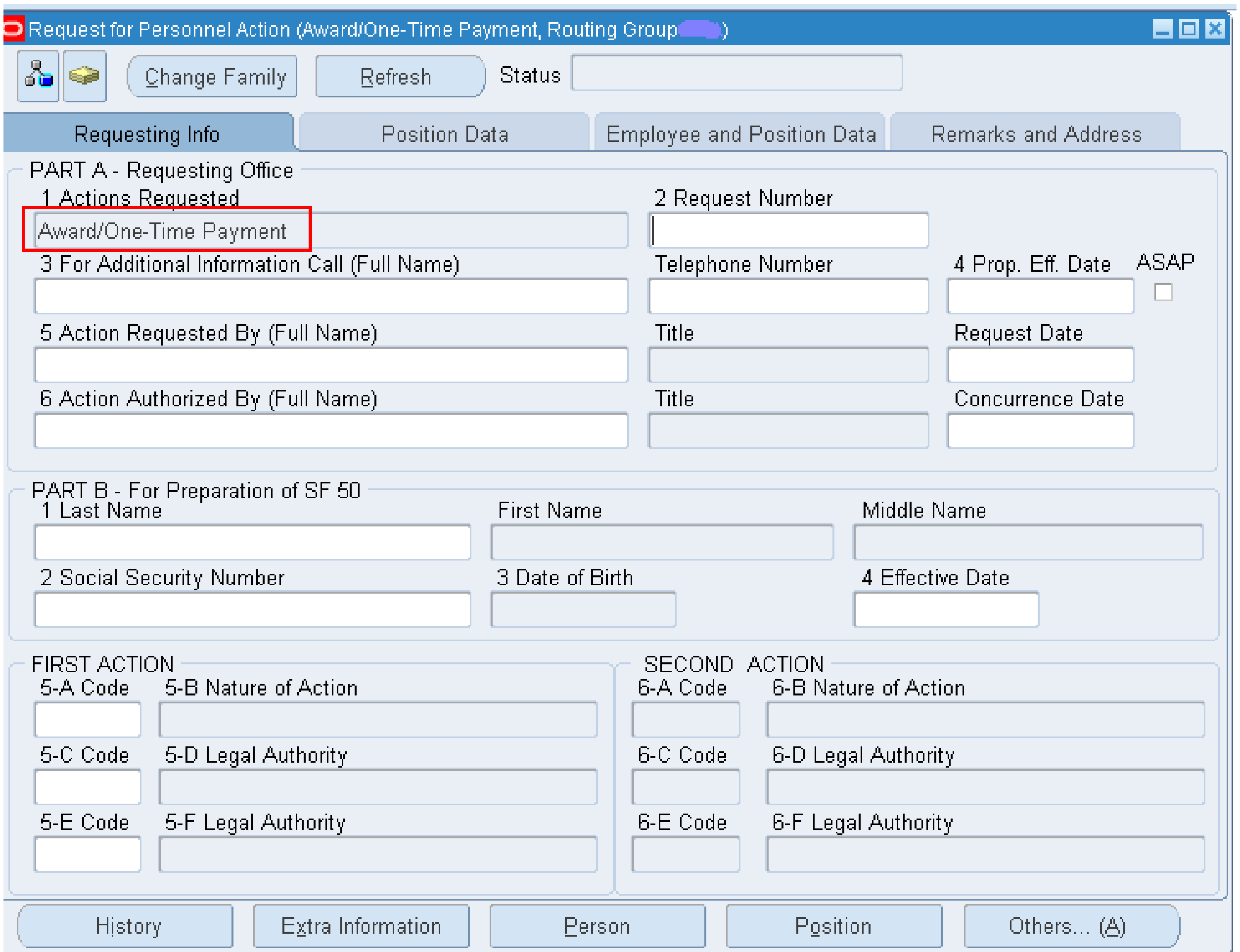
Step 1
From the **Navigator → Request for Personnel Action → Select Award/One-Time Payment.**



Step 2

<u>Requesting Info</u>: PART A – Requesting Office
This section explains how to complete the RPA for a monetary award. Data fields are described and the actions explained. The white data fields must be completed. The Action Requested will be Award/One-Time Payment, which determines the fields to be completed.

Complete this section on all actions.



Complete the remaining white data fields using the instructions from the table below. For addition information on completing an RPA refer to ***Chapter 13: Processing Requests for Personnel Actions.***

Field Number 1 - *Actions Requested*

Description/Action:
The data field automatically populates based on the action selected from the **Navigator → Request for Personnel Action.**

Field Number 2 - *Request Number*
Description/Action:

The Request Number is user defined.

Note: Please see your CHRIS Manager for Request Number naming standards and conventions.

Field Number 3- *For Additional Information Call*

Description/Action:

Type in the name of the contact person. The data field can be left blank.

Or

Click the List of Values (LOV) button for a listing of database names, click the correct name from the List of Values (LOV) button and then click the O K button.

Note: If a screen is displayed informing you the list is too long, type a few letters of the last name of the individual, followed by the % sign; NOTE if you just input a % sign and click the OK button it could take some time to pull up the entire listing of names.

Field Number: *Telephone Number*

Description/Action:
Enter the telephone number of the contact person for this action.

Field Number 4 - *Proposed Effective Date*

Description/Action:

Type the proposed effective date for the action in the DD-MMM-YYYY format; e.g., 09-JUN-2002 or click in the white box under "ASAP" if applicable. Hyphens **are** required and the month is always capitalized.

Or

Click the List of Values (LOV) button. The current month and year with the current date highlighted is displayed in the **Calendar** window.

Choose the correct date and click the OK button to populate the date field. This field can also be left blank.

Field Number: *ASAP*

Description/Action:
Click this data field if you want the effective date on this action to be **As Soon As Possible.**

Note: You **cannot** select both a proposed effective date and the ***ASAP*** field. If you do not check ASAP or enter a date, the system date will automatically default to ASAP.

Field Number 5 - *Action Requested By*

Description/Action:
Type in your name, if you have the role of the *Requestor* or *Personnelist*. You can also leave blank.

Or

Click the (LOV) button for a listing of names of individuals given the responsibility of requesting. Choose the correct name and click the OK button to populate the data field

Field Number: *Title*

Description/Action:
This data field will automatically populate based on block 5.

Field Number: *Request Date*

Description/Action:
The date is automatically populated once the ***Action Requested By*** data field is completed. You can change the date by selecting a new date.

Field Number 6 - *Action Authorized By*

Description/Action:
Type in your name, if you have the role of the *Requestor* or *Personnelist*. You can also leave blank.

Or

Click the List of Values (LOV) button for a listing of names of individuals given the responsibility of requesting. Choose the correct name and click the OK button to populate the data field.

Field Number: *Title*

Description/Action:
This data field will automatically populate based on block 6.

Field Number: *Concurrence Date*

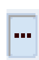
Description/Action:
The date automatically populates once the ***Action Authorized By*** data field is completed. The date can be changed by selecting a new date.

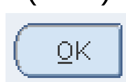
<u>Requesting Info</u>: PART B – For Preparation of the RPA (SF-50)
Complete this section on all awards/one-time payments.

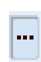
Field Number 1 - *Last Name*

Description/Action:
Type in the last name or part of the last name of the person for whom the RPA is being processed. Press the [**Tab**] to automatically populate the data field.

Or

Click the List of Values (LOV)  button, choose the name from the list displayed,

and click the OK  button to automatically populate the data field.

When you select a name from the List of Values (LOV)  button, the ***First Name, Middle Name***, ***Date of Birth***, and ***Social Security Number*** data fields will automatically populate on the RPA

Field Number 2 - *Social Security Number*

Description/Action:
This data field will automatically populate based on the last name selected, block 1.

Field Number 3 - *Date of Birth*

Description/Action:
This data field will automatically populate based on the last name selected, block 1.

Field Number 4 - *Effective Date*

Description/Action:

Complete the ***Effective Date*** by typing in the effective date using DD-MMM-YYYY format.

Or

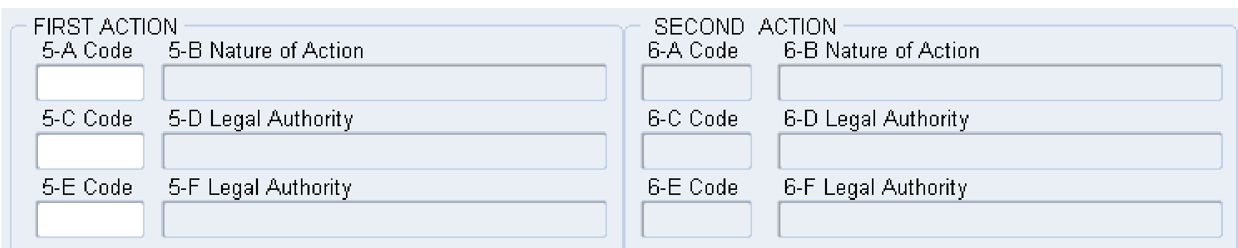
Click the List of Values (LOV) button to display a calendar. Select the correct date and click the OK button.

Or

If you are "date tracked", when you click in this field, the date you are date tracked to will auto populate

Requesting Info: First Action

Complete this section on all award/one-time payment actions.



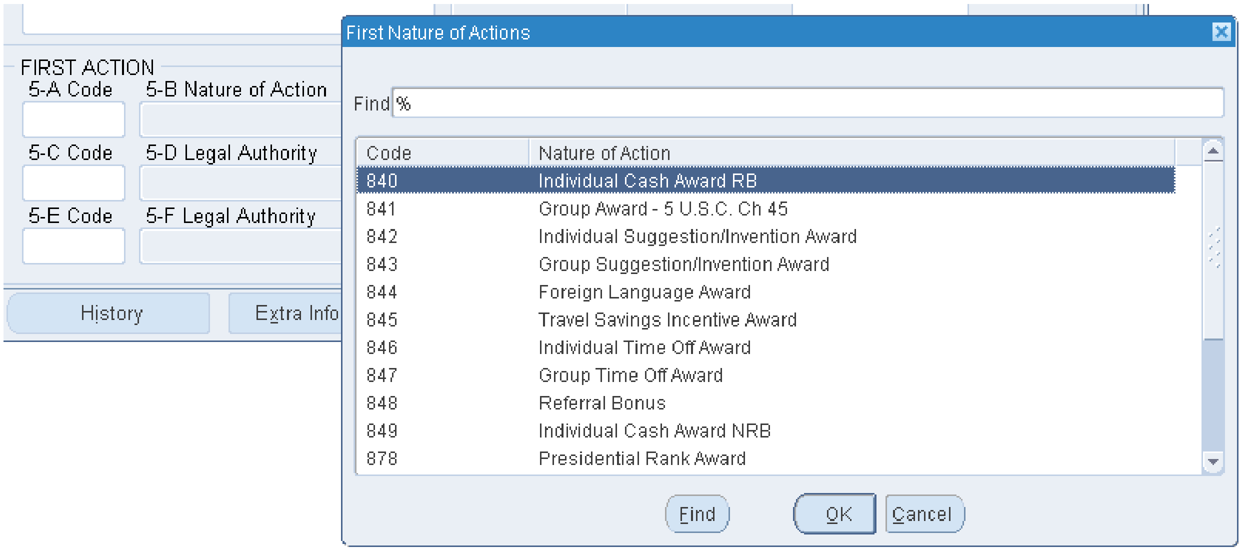
Field Number 5-A & 5-B - *Code and Nature of Action*

Description/Action:

Type in the Nature of Action Code (NOAC).

Or

Click the List of Values (LOV) button to display a listing of NOACs.



Select the correct code, and click the OK 

button to automatically populate the ***Code*** and ***Nature of Action*** data fields.

The type of NOAC that is selected will determine where the cursor will advance.

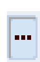
The NOACs without Legal Authority codes will advance to the **Position Data** tab. Refer to OPM's ***Guide to Processing Personnel Actions*** for more information pertaining to Legal Authority Codes.

Field Number 5-C & 5-D - *Code and Legal Authority*

Description/Action:

With your cursor in block 5-C, type in the ***Legal Authority Code*** required for the action.

Or

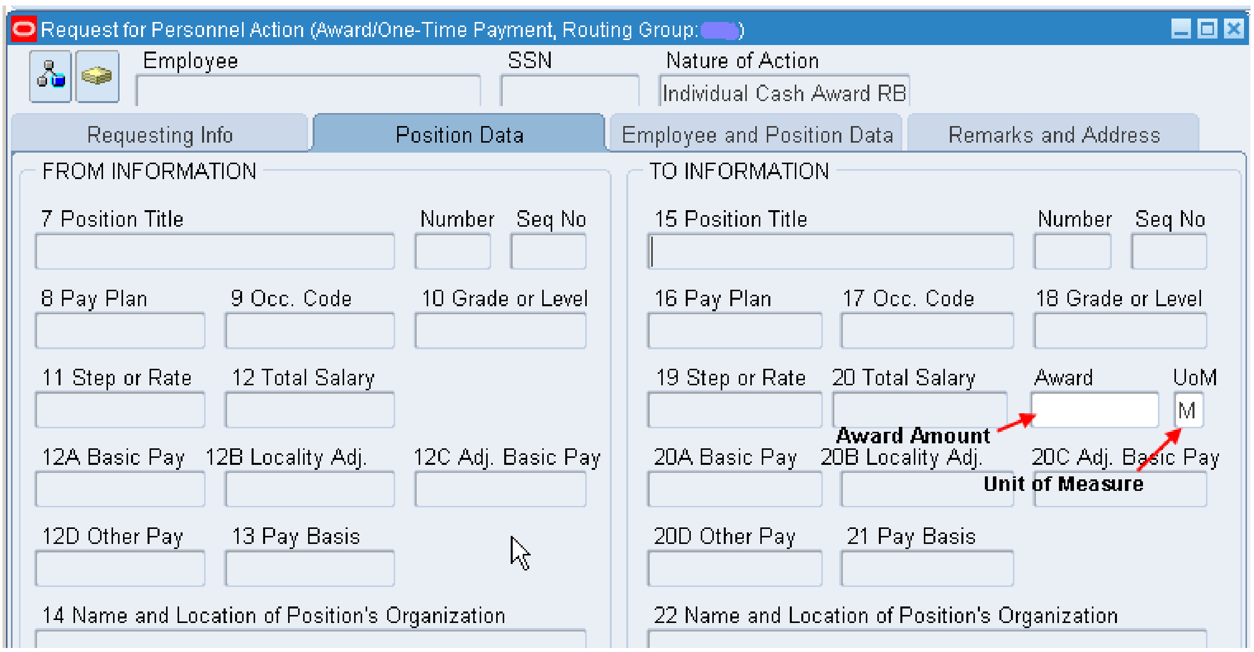
Click the List of Values (LOV)  button to display a listing of Legal Authority Codes. The list of Legal Authority Codes will only include the codes pertaining to the specific nature of action.

Data block 5-D **Legal Authority Code** is not required for Award/One Time Payment actions.

POSITION DATA

Click the **Position Data** tab, the **Request for Personnel Action** window opens with the **Position Data** tab Displayed.

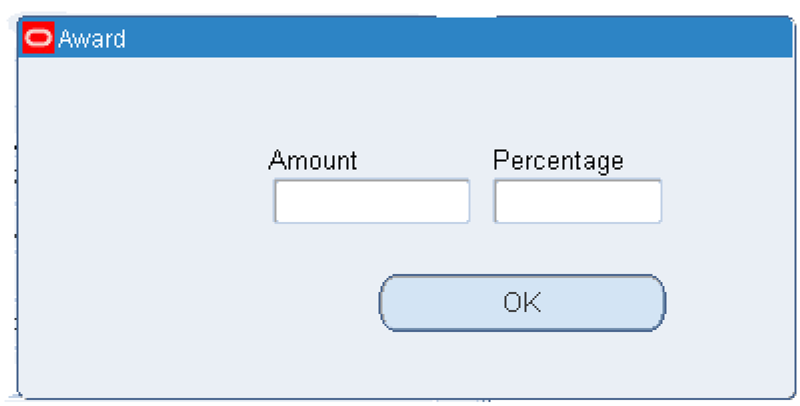
The **FROM INFORMATION** and **TO INFORMATION** Regions are automatically populated. The only white data fields that need to be completed in this tab are listed below



<u>Position Data:</u> To Info

Step 1

Click in the ***Award*** field. The **Award** window appears.



Step 2

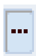
Enter the percentage of the award in the ***Percentage*** data field. The Amount data field will automatically calculate with an amount equal to the percentage you entered times the Basic Pay (12A on the RPA).

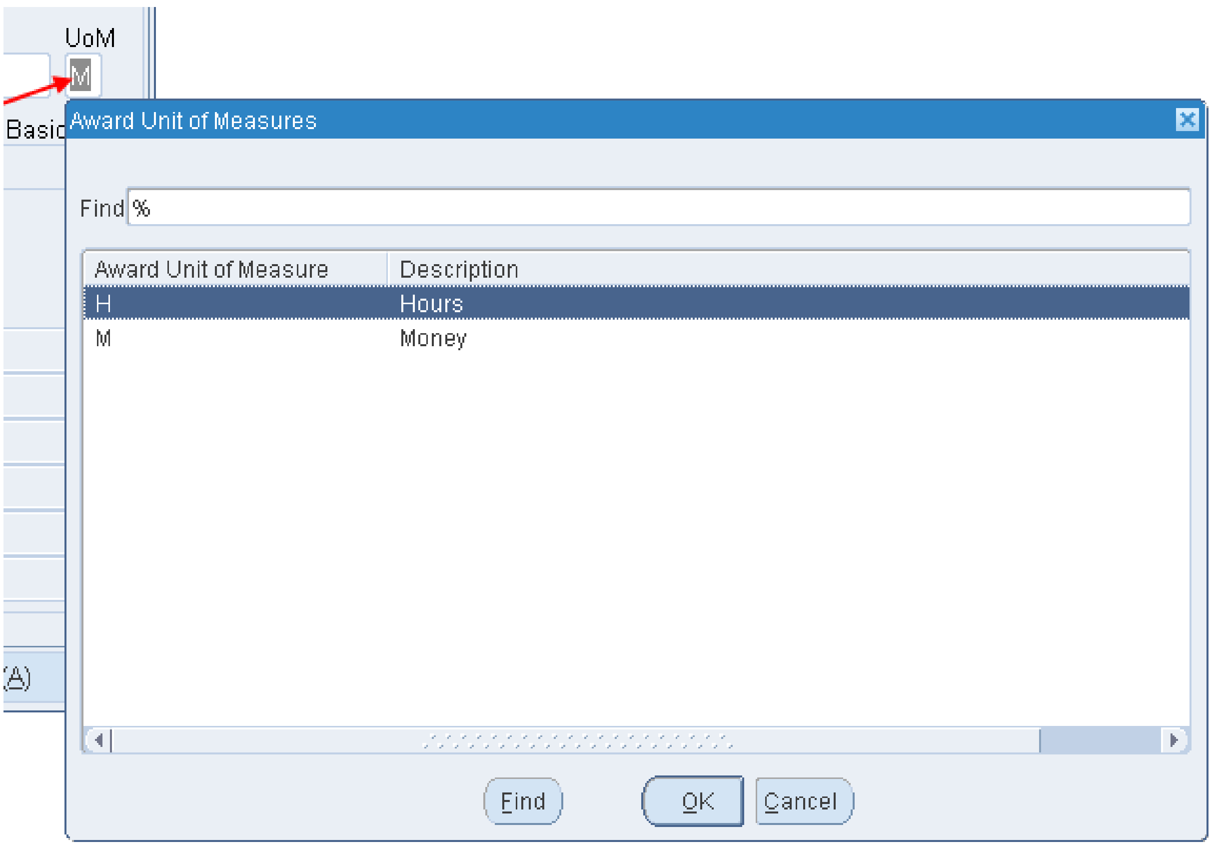
If the award has a known dollar amount, type in the monetary amount in the ***Amount*** data field. If the award is a Time Off Award, type in the number of hours in the ***Amount*** data field.

Click the OK 

button.

Step 3

Tab to the ***UoM*** data field. Type in “H” for Hours or “M” for Money or click the List of Values (LOV)  button and the **Award Unit of Measures** (**UoM**) window displays.

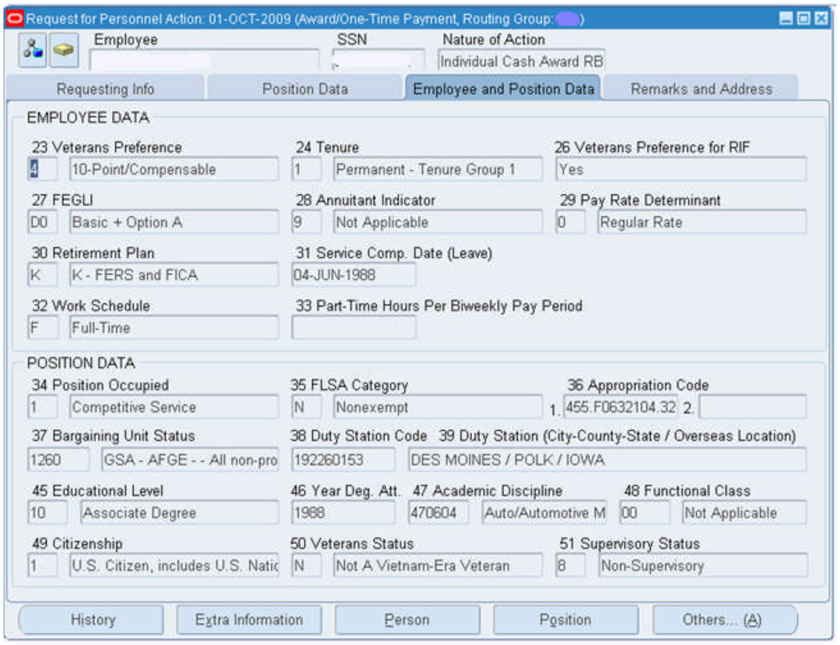


Step 4

Select Hours or Money and click the OK 

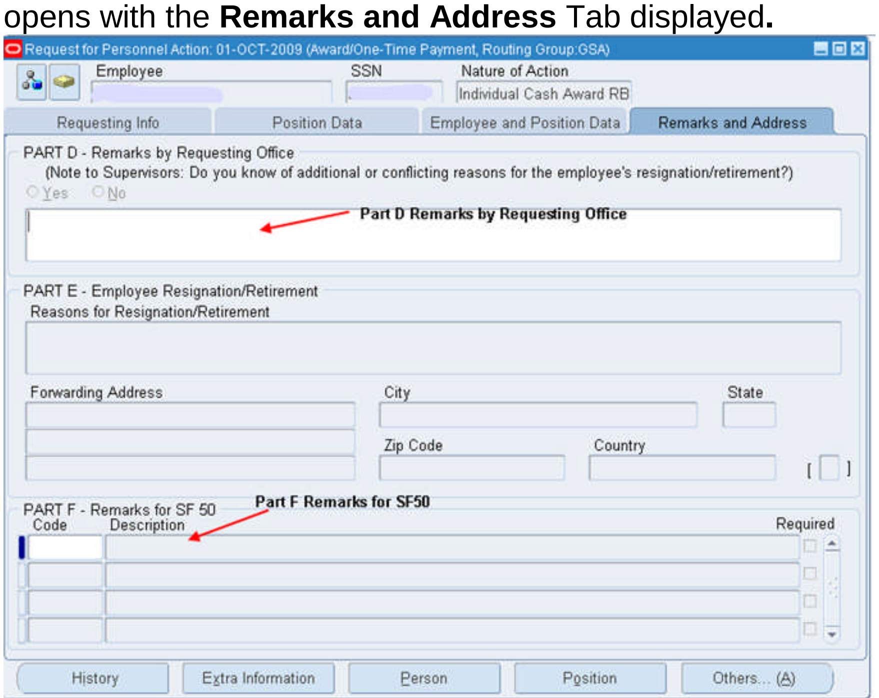
button.

Employee and Position Data: Employee Data
Click on the **Employee and Position Data** tab located at the top of the RPA. The **Request for Personnel Action** window opens with the **Employee and Position Data** Tab displayed. All of the information in this window is automatically populated.



REMARKS AND ADDRESS INFORMATION

Step 1
Click on the **Remarks and Address** Tab. The **Request for Personnel Action** window opens with the **Remarks and Address** Tab displayed**.**

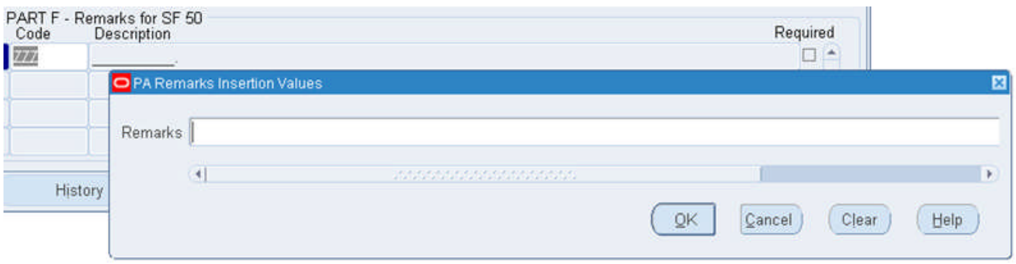


Step 2
Click in **Part D – Remarks by Requesting Office** field, type any remarks. Completion is optional.

Step 3

Click in the Part F – Remarks for SF50 code field; click the List of Values (LOV) button, the ZZZ Remark will automatically populate.

The ZZZ Remark you chose requires an Insertion Value, the **Insertion Value** window will appear.



Type in the insertion information and click the OK button to populate the blank space in the ***Remark Description*** data field.

Move the cursor to the next block in the Remarks data field to input another code/remark, if required. Continue to do this until all required and/or appropriate codes/remarks have been selected for this action.

Step 4
Click the Save button on the Toolbar to save your RPA.

RPA Remarks Tips
The following are some general hints for the Remarks section of the RPA.

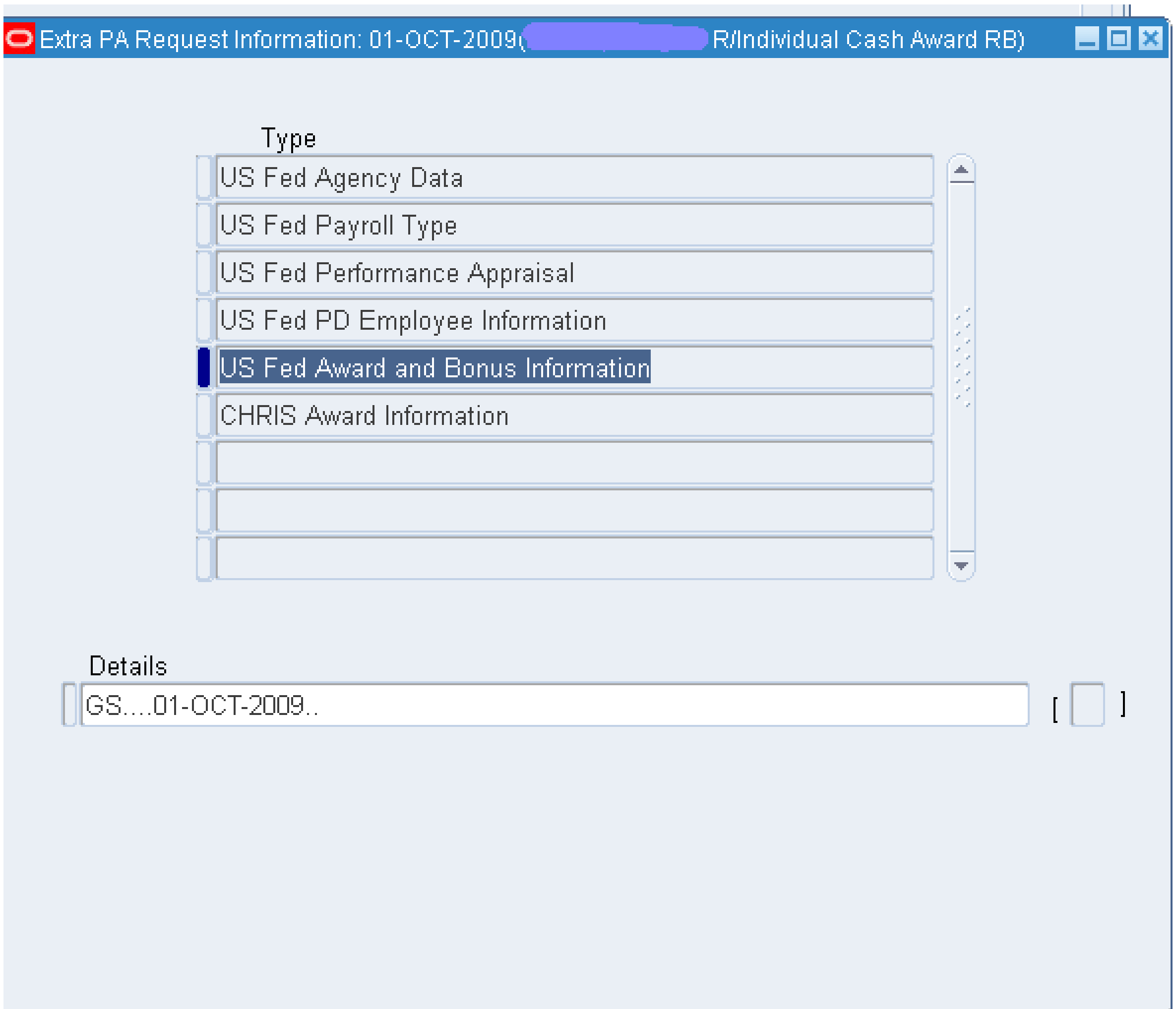
- If you wish to insert information in the remarks data field, click in the remarks ***code*** data field, press the Tab **[TAB]** button to display the pop-up screen, and type in your remark.
- If a remark code has been pre-programmed as mandatory for your Nature of Action, the remark code and clear text will pop into the view on the screen as soon as the Personnelist touches the remarks input area for the first time.
- A remark can be deleted by substituting a different remark code in the code field.
- A remark can be deleted without replacement by clicking the Clear Record button or the Delete button on the Toolbar.

- Each remark is a separate record in CHRIS, so the “record” you are deleting when your cursor is in a remark code/clear text field is only the remark. It is safe to respond “yes” to erase the remark you want to remove.

EXTRA INFORMATION TAB

Click the Extra Information 

tab located at the bottom of the RPA. The **Extra PA Request Information** window displays

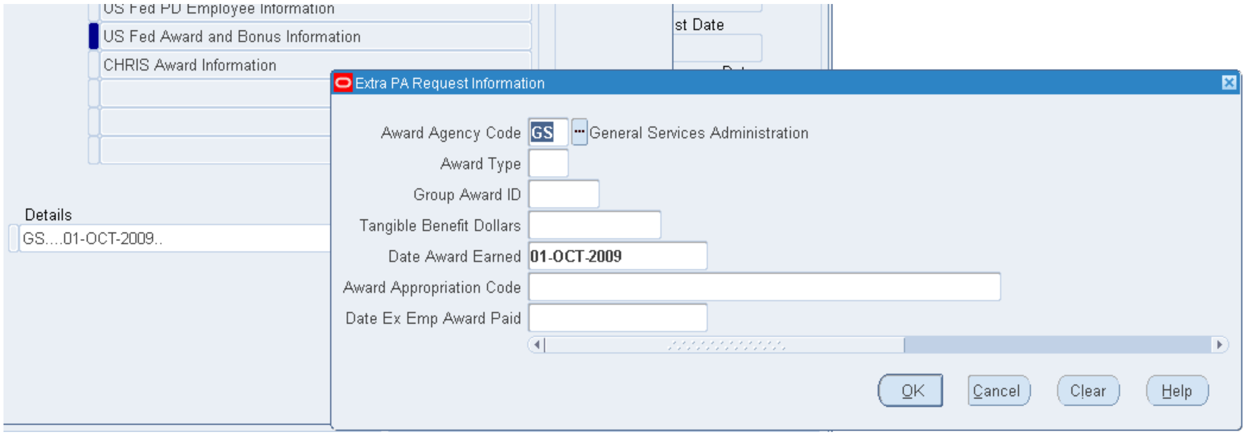


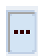
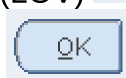
.

Note: The Extra information Types above may change depending on the Award NOA you choose.

Step 1

Use the *Current Record Indicator* (small box at the beginning of the field name) to select ***US Fed Award and Bonus Information***. Double Click in the ***Details*** data field. The **Extra PA Request Information** window displays.



Click the List of Values (LOV)  button or type the information in the data fields as required. Click the OK  button when finished.

Step 2

Click the Save  button on the Toolbar to save your information.

Or

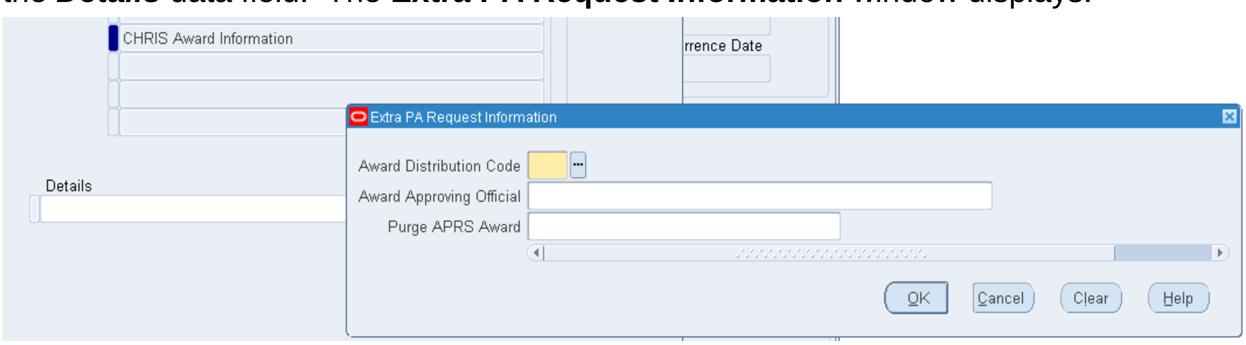
On the Main Menu Bar, click **File → Save**.

Or

Click **File → Save and Proceed**.

Step 3

Use the *Current Record Indicator* to select ***CHRIS Award Information.*** Double Click in the ***Details*** data field. The **Extra PA Request Information** window displays.



Click the List of Values (LOV)  to choose the Award Distribution Code. After inputting the Award distribution code, click the OK  button.

Step 5

Click the Save button on the Toolbar to save your information.

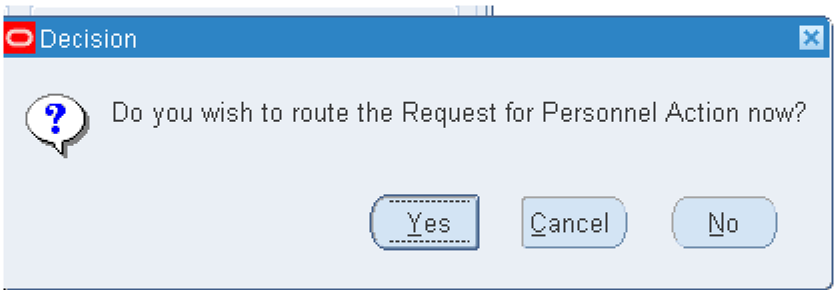
Or

On the Main Menu Bar, click **File → Save**.

Or

Click **File → Save and Proceed**.

When you click on the Save button, a **Decision** window displays.



Click the Cancel button to stop the process and return to the RPA.

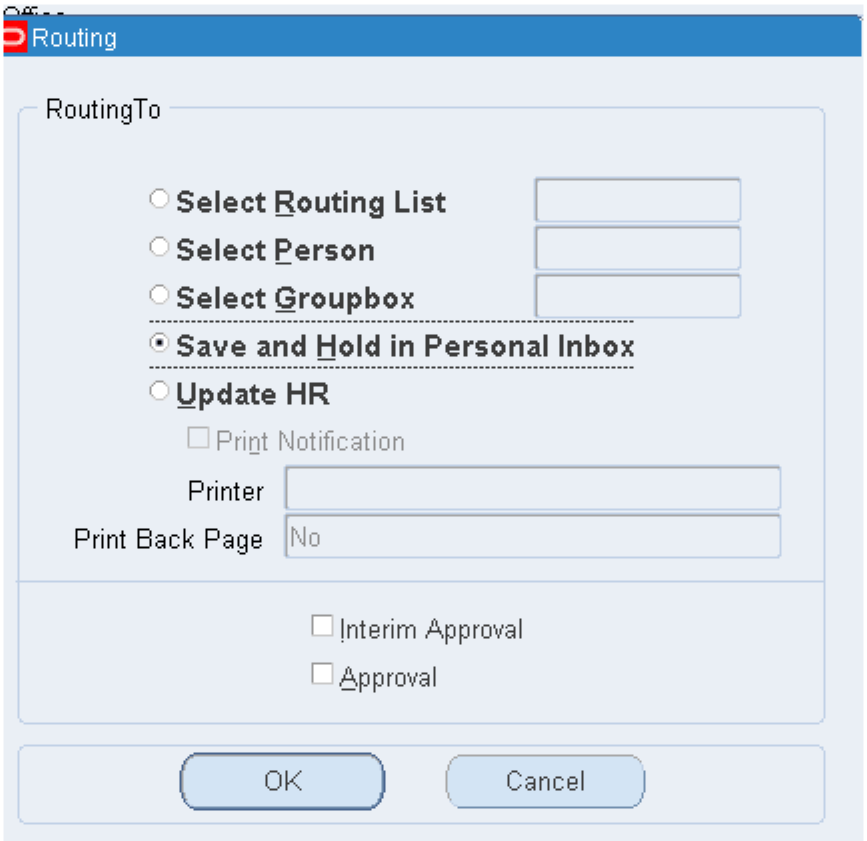
Or

Click the NO button to save your action to this point and return to the RPA.

Or

Click the Yes button to display the **Routing** window.

Step 6
The **Routing** window gives you several options for processing your RPA. Select the correct option based on your role in the routing of your RPA.



Notes:

- The application defaults to the **Save and Hold in Personal Inbox** option.
- Some of the options in the **Routing** window may be grayed out based on your role and responsibility.

To print a Notification of Personnel Action(NPA), place an "X" in the **Print Notification Box**. Use the List of Values (LOV) button to select a printer.

Step 7
Refer to the following section below for instructions on how to route the RPA.

Process to Select Routing List

Routing to List of Recipients*: Select Routing List*

Description/Function
Click ***Select Routing List*** to display a **Routing Lists** window. The **Routing Lists** will allow you to select a predetermined sequence of recipients. The listing defines the order in which a personal inbox or groupbox receives the workflow notification.

Routing To Region: *1*

Click the OK 

button to populate the data field on the **Routing Lists** window

.**Routing To Region:** *2*

Click the OK 

button to populate the data field on the **Routing Lists** window.

Routing To Region: *3*

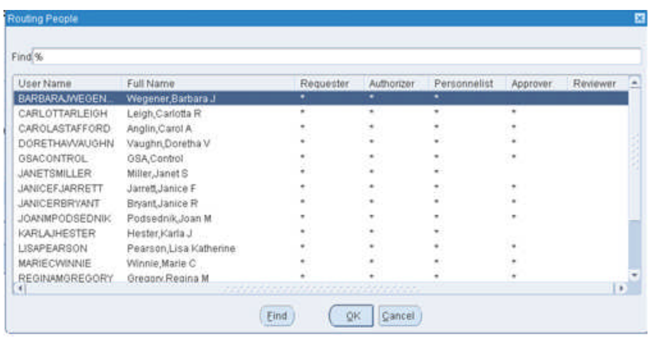
Click the OK 

button on the **Routing** window to route the action.

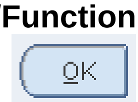
<u>Process to Select Person</u>

Routing To Person: *Select Person*

Description/Function:
Click ***Select Person*** to display a **Routing People** window to route the action to a listing of individuals based on their role.

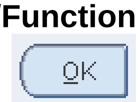


Description/Function:

Click the OK 

button to populate the data field on the **Routing People** window.

Description/Function:

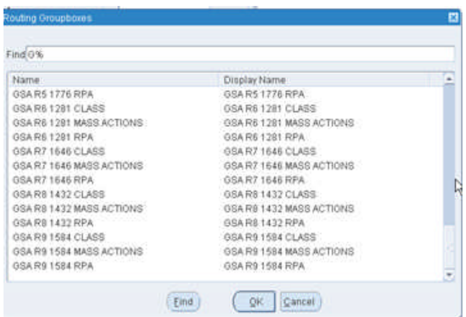
Click the OK 

button on the **Routing** window to route the action.

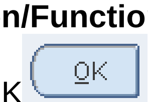
<u>Process to Select Groupbox</u>

Routing To Groupbox: *Select Groupbox*

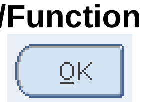
Description/Function:
Click the ***Select Groupbox*** to display the **Routing Groupboxes** window. A Groupbox contains a group of people who share a common function in the RPA process. The Groupbox could contain members of an office, branch, workgroup, etc. Each Groupbox member's role is individually defined and may or may not be identical to the roles of other Groupbox members.



Description/Function:
Click the correct Groupbox.

Description/Function:
Click the OK 

button to populate the data field on the **Routing Groupboxes** window.

Description/Function:
Click the OK 

button on the **Routing** window to route the action.

Process to Save and Hold in Personal Inbox

Routing To Personal Inbox: *Save and Hold in Personal Inbox*

Description/Function:
Select this option if you have not finished working on the RPA action. It will be saved in your CHRIS Workflow Notification Inbox. You can then select and complete the RPA action at a later time.

Click the OK 

button to save the RPA to your CHRIS Workflow Notification Inbox.

Notes:

- The system automatically defaults to the Save and Hold in Personal Inbox option.
- You **<u>must</u>** save the action to your Inbox in order to query the RPA from your Inbox after the action has processed.

Process to Update HR

Selection: *Update HR*

Description/Function:
You can select ***Update HR*** <u>only</u> if you have the assigned role and responsibility of updating the CHRIS database. This procedure will generate a Notification of Personnel Action (NPA). CHRIS applies the RPA data to the appropriate position and personnel records, replacing existing information with the new information.

Note: CHRIS application does an edit check on the RPA action when the ***Update HR*** option is selected, notifying you of corrections that need to be made before any **Update HR** can occur.

Process to Print Notification

Selection: *Print Notification*

Description/Function:
Clicking ***Update HR*** automatically places an “X” in the ***Print Notification*** box if the effective date on the RPA is current or a past date. You do not have to print a Notification of Personnel Action at this time; therefore, you can deselect the print option. You can print the personnel action at a later time.

Discussed in ***Chapter 14: Accessing and Printing Request for Personnel Actions***.

<u>Other Processes</u>

Approving the RPA

Description/Function:

Click the *Approval* 

box on the **Routing** window if you are assigned the role of ***Approver***.

Note: As an *Approver*, you can submit the RPA to Update HR, print the Notification for Personnel Action, return the RPA to the initiator to make changes and resubmit, or return the RPA to the Authorizer to make changes or to a Personnelist to finalize.

Interim Approval: The use of this function is dependent on business rules in the system.

Description/Function:

Click the Interim Approval 

box on the **Routing** window if you are not assigned the role of final approver.

Stop the process and return to the RPA

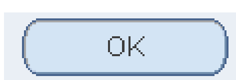
Description/Function:

Click the Cancel 

button to stop the process and return to the RPA.

Update HR

Description/Function:

Click the OK 

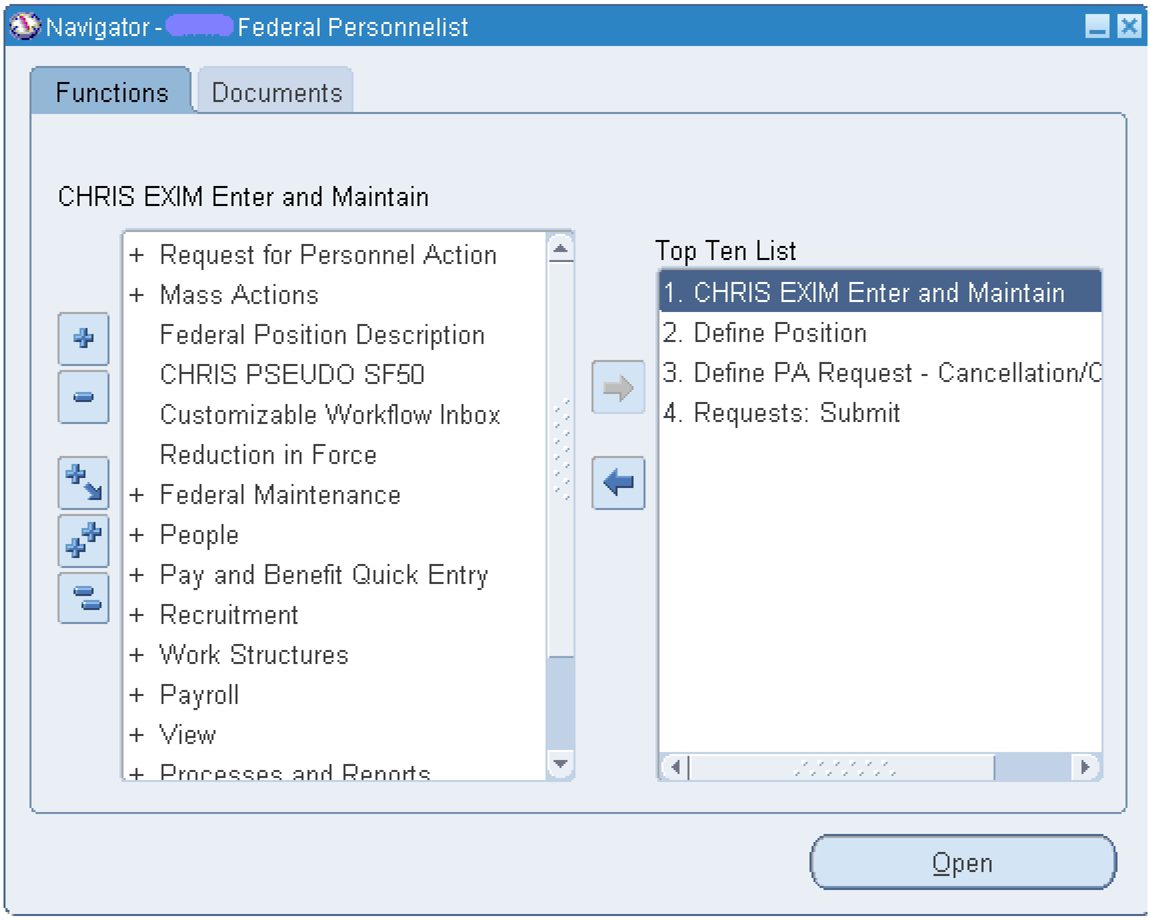
button to process the action and ***Update HR*** or to route the action to another inbox.

Note: Follow the instructions displayed on the screen if an **Error Message** window displays on your screen.

STEP TWO ENTERING A NON-MONETARY AWARD

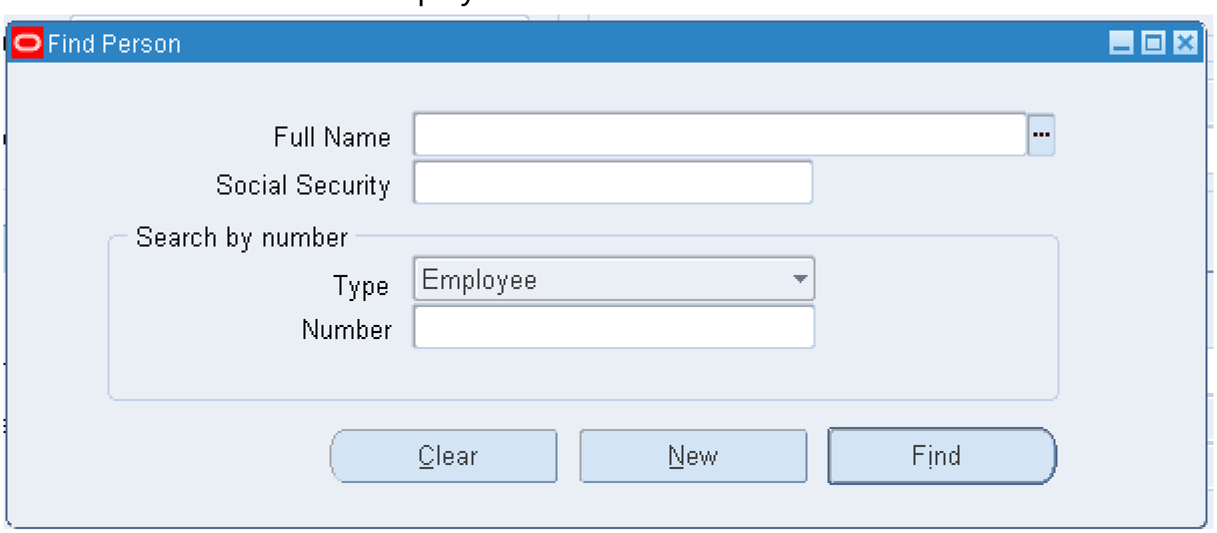
STEP 1

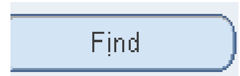
From the **Navigator → People → Select CHRIS Enter and Maintain.**



Step 2

The **Find Person** window displays.

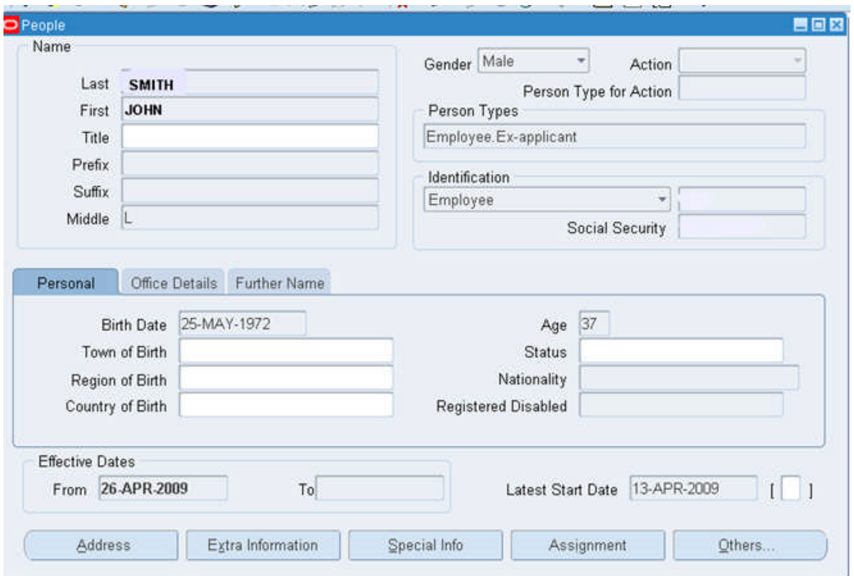


Query for the employee or type in the last name and click the Find 

button.

Step 3

The **People** window displays populated with employee data.

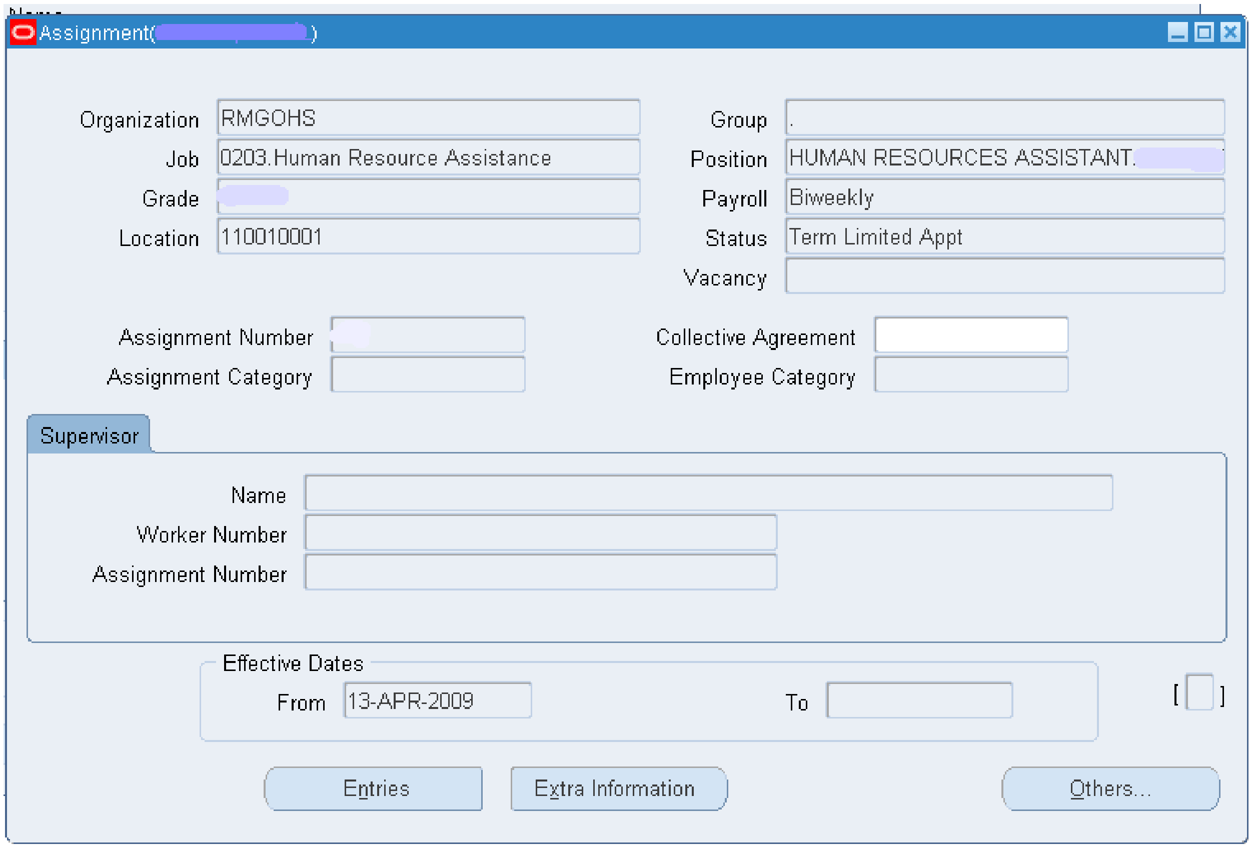


Click the Assignment 

button located at the bottom of the screen.

Step 4

The **Assignment** window displays with many of the data fields populated and/or grayed out.

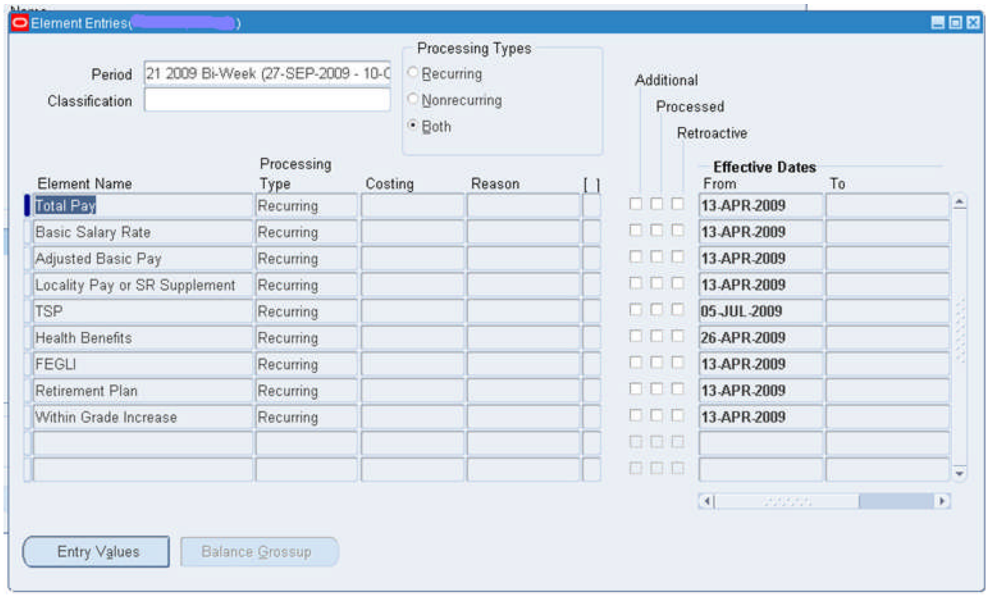


Click the Entries 

button located at the bottom of the screen.

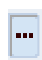
Step 5

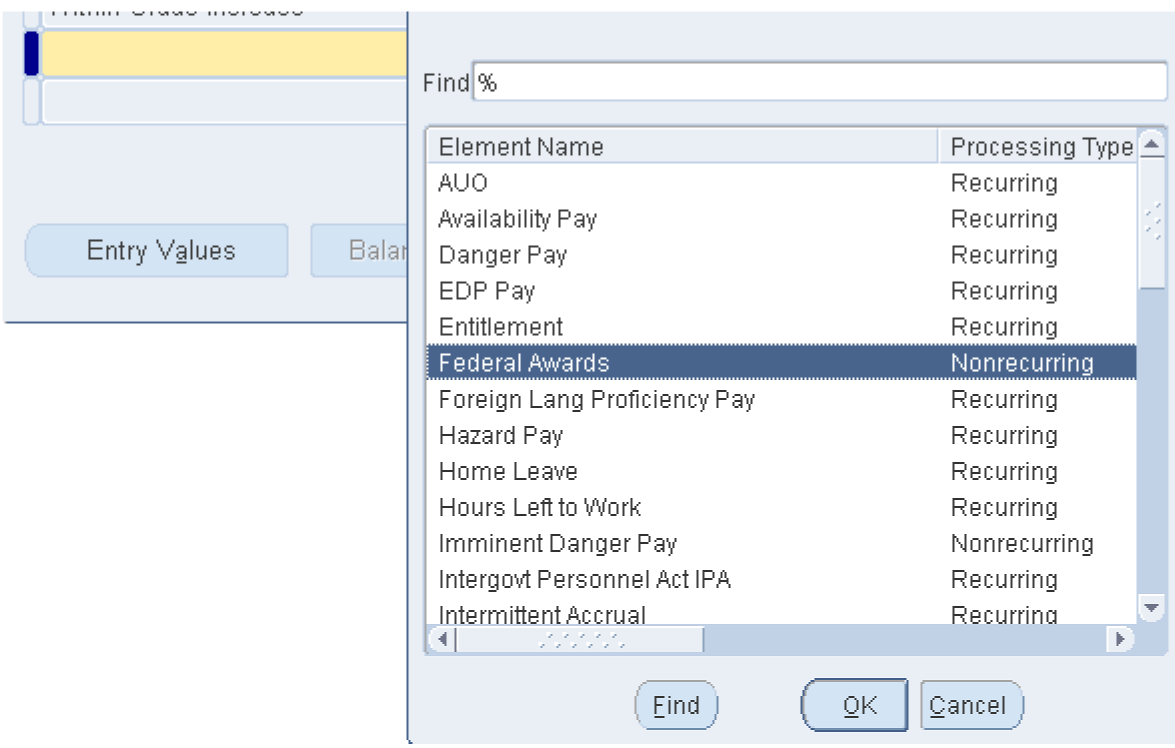
The **Element Entries** window opens.



Your cursor will be on the first data field in the ***Element Name*** column. Move the *Current Record Indicator (small box at the beginning of data field)* to the first **blank** data field or place your cursor in the ***Element Name*** data field and click the New Record  button.

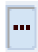
Step 6

Click the List of Values (LOV)  button. The **Elements** window displays.



Choose *Federal Awards* and click the OK 

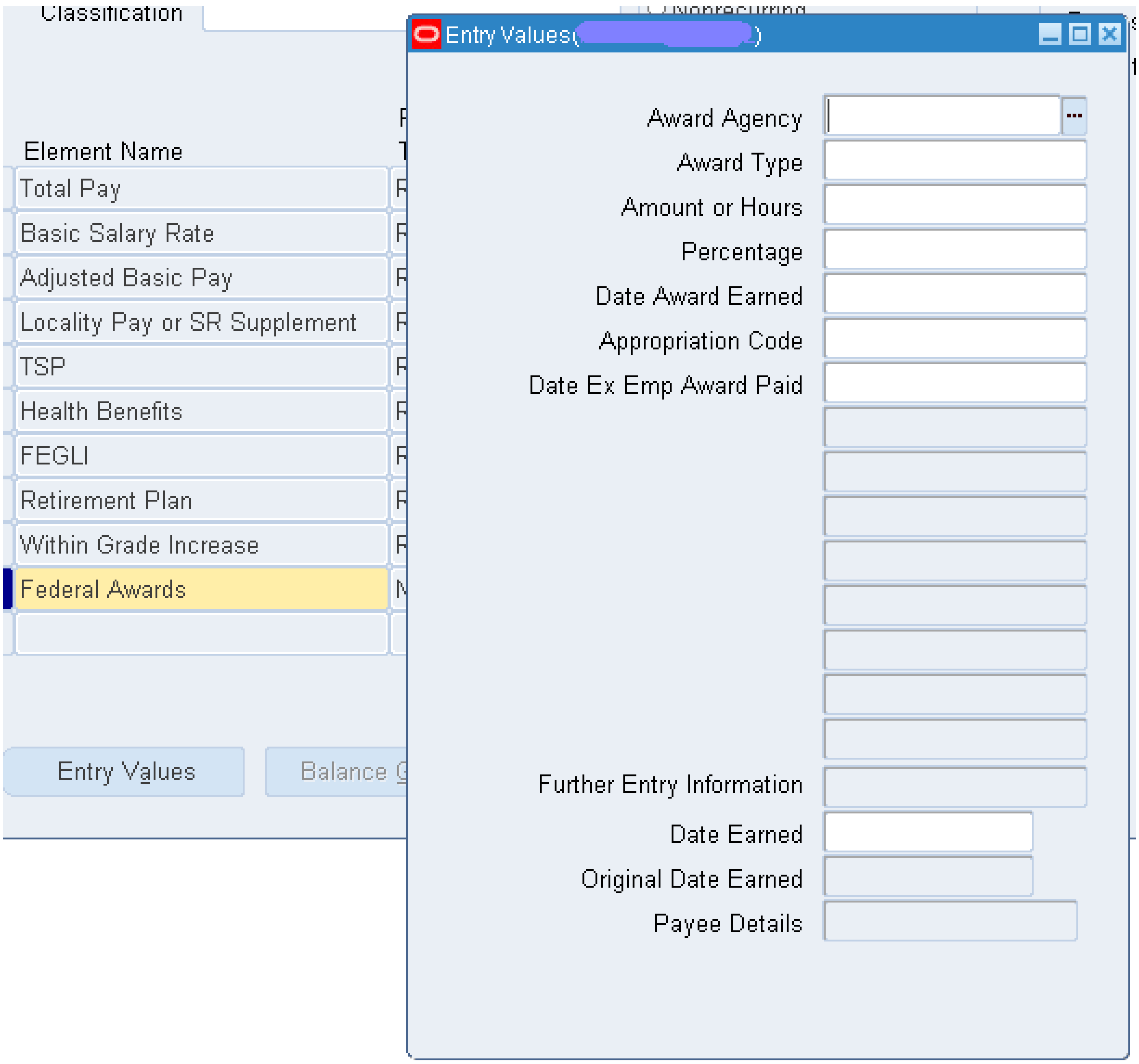
button.

Note: All recurring elements that apply to the employee's record are stored in this List of Values (LOV)  button. Non-recurring elements are by the pay period in which they are effective.

Step 7

Click the Entry Values 

button on the **Element Entries** window to display the **Entry Values** window.



Step 8

Select the **Award Agency** from the List of Values (LOV) button.

Step 9

Select the **Award Type** from the List of Values (LOV) button.

Step 10

Select the **Date Award Earned** from the List of Values (LOV) button..

Step 11

Exit the entry values window.

Notes:

- The Entry Value for Date Award Earned is completed only if the award you are entering is outside the **current pay period**.
- The Date Earned field is embedded in the Oracle product and is not necessary to complete the action

Step 12

Click the Save button on the Toolbar and exit the windows.

Or

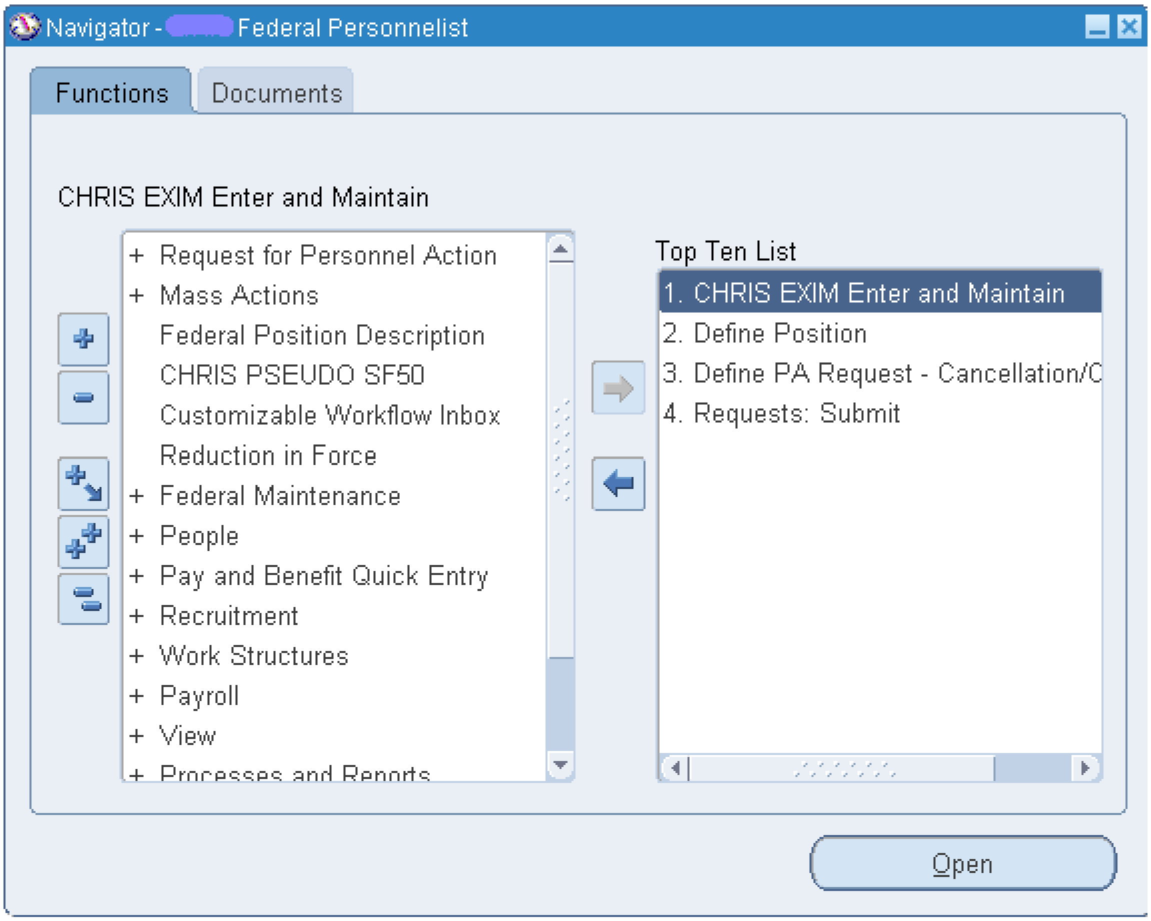
On the Main Menu Bar, click **File → Save**.

Or

Click **File → Save and Proceed**.

STEP THREE CORRECTING EXISTING AWARD DATA

This section explains the process for correcting existing Award data in the **current pay** period

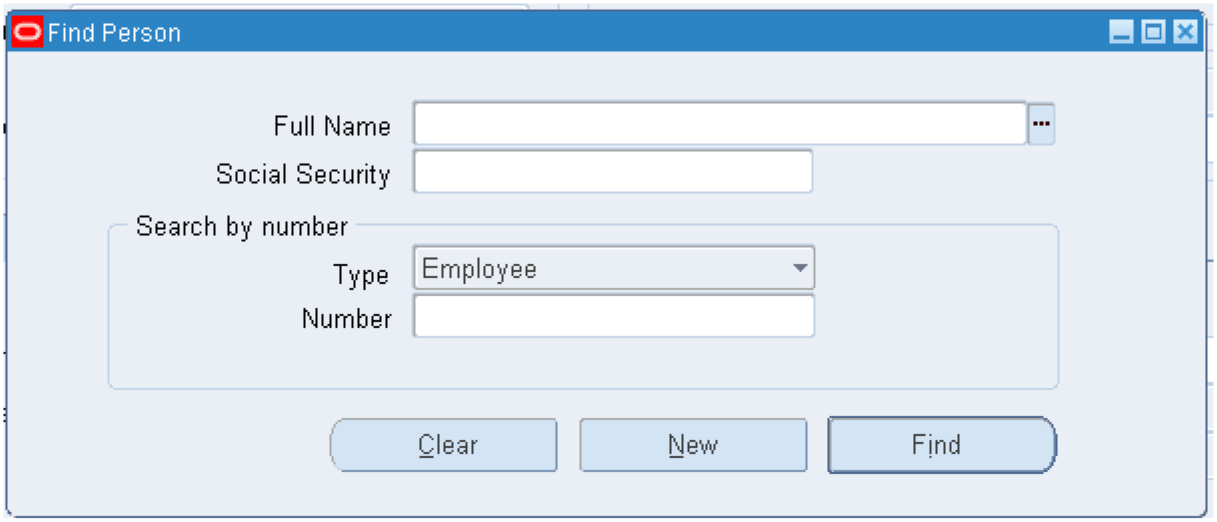


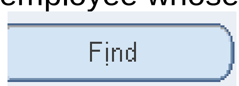
Step 1

From the **Navigator → People → Select CHRIS Enter and Maintain**.

Step 2

The **Find Person** window displays.

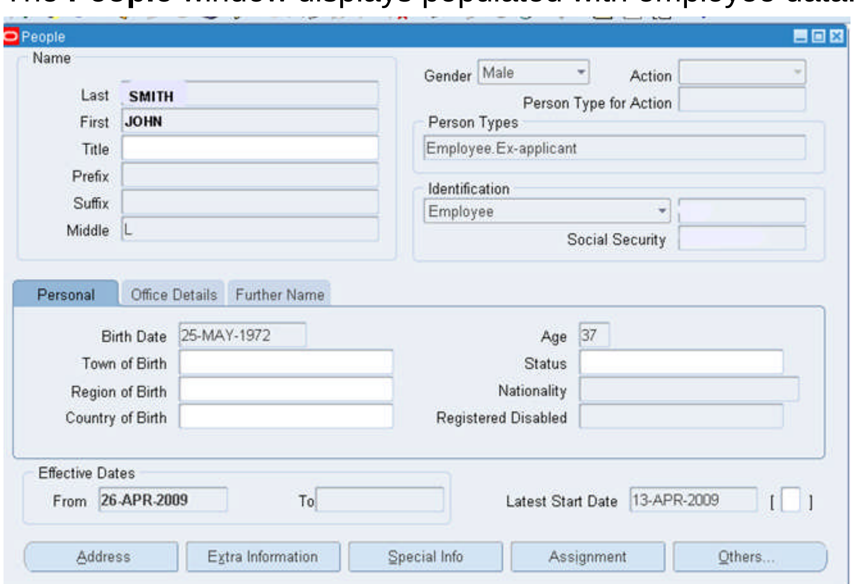


Query for the employee whose record you wish to update or type in the last name and click the Find 

button.

Step 3

The **People** window displays populated with employee data.

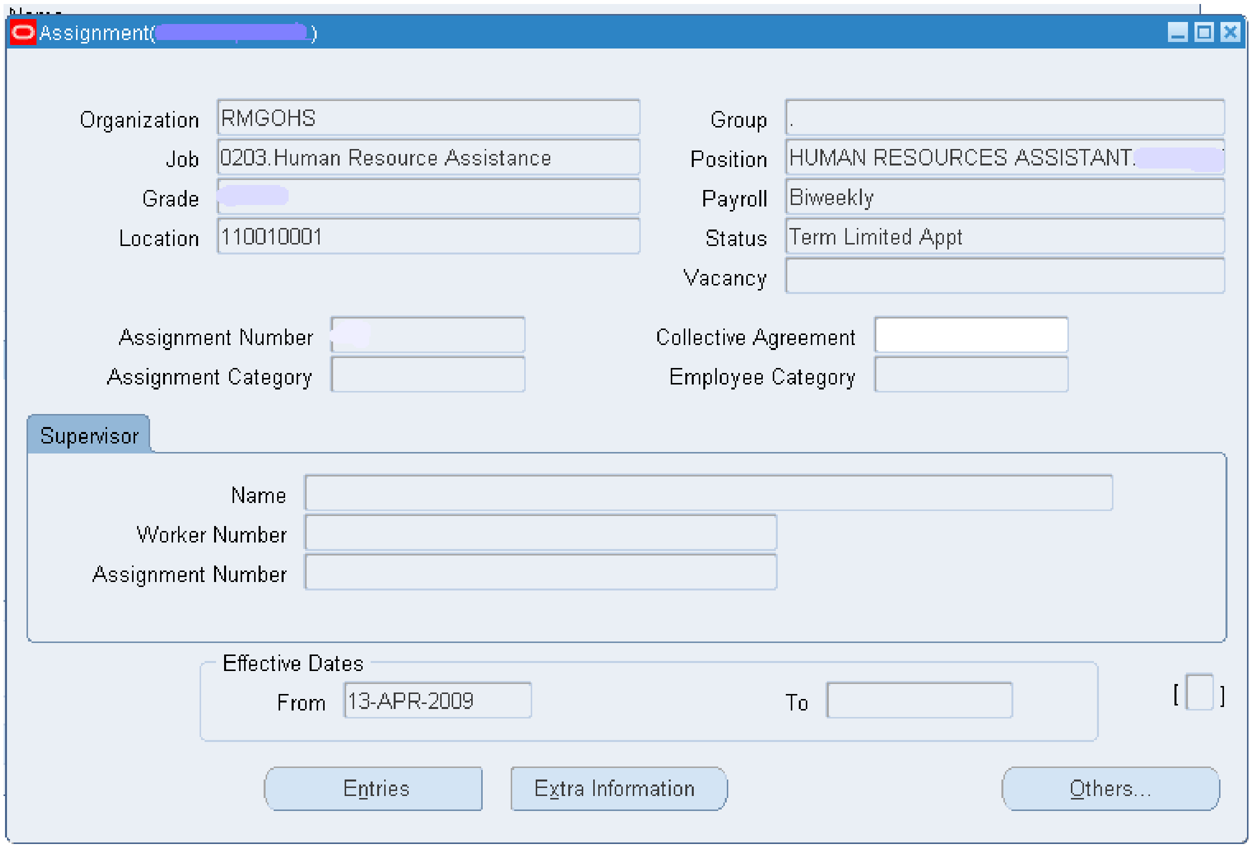


Click the Assignment 

button.

Step 4

The **Assignment** window displays with many of the data fields populated and/or grayed out.

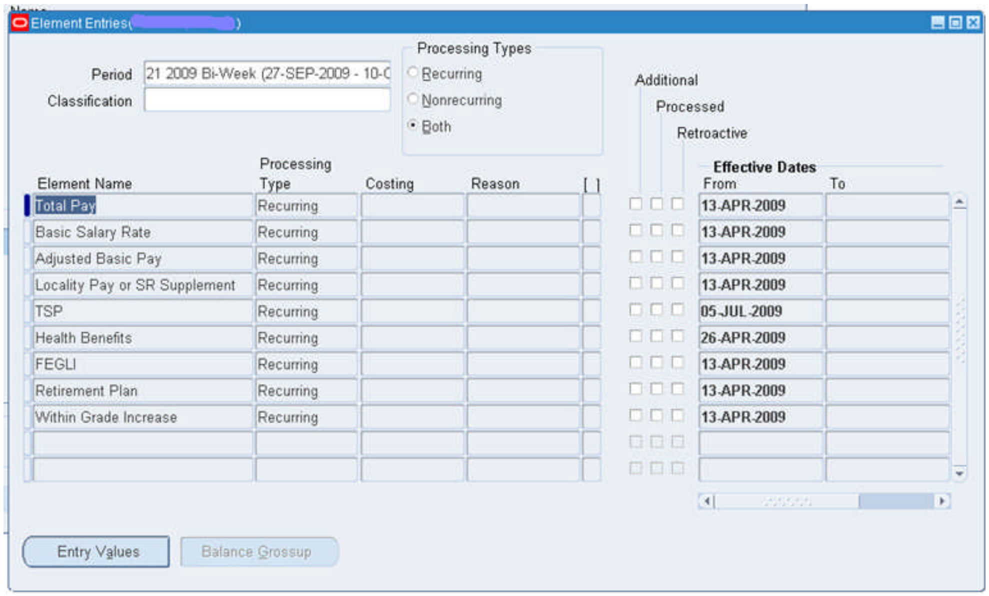


Click the Entries 

button.

Step 5

The **Element Entries** window opens.



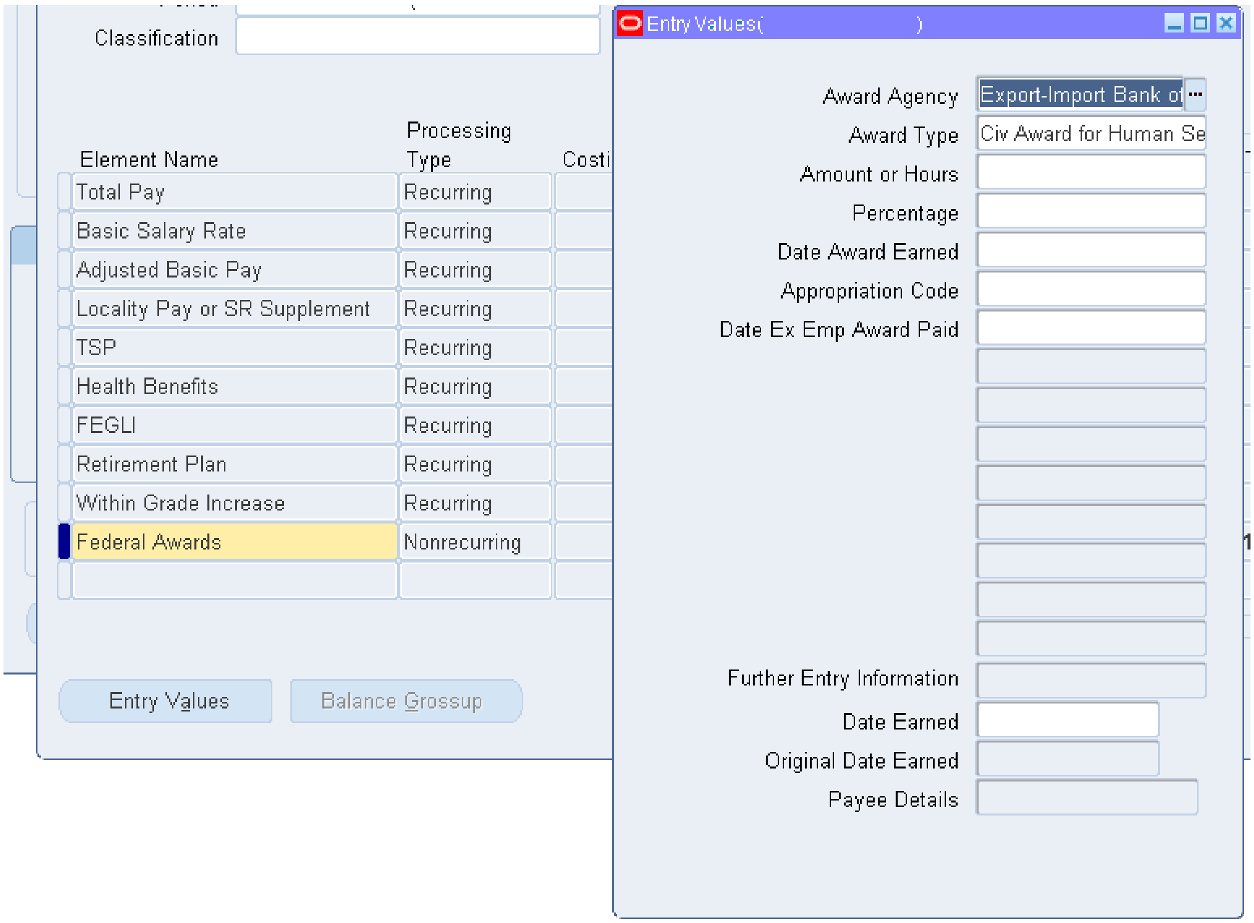
Your cursor will be on the first data field in the ***Element Name*** column. Move the *Current Record Indicator* to the record to be corrected.

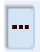
Step 6

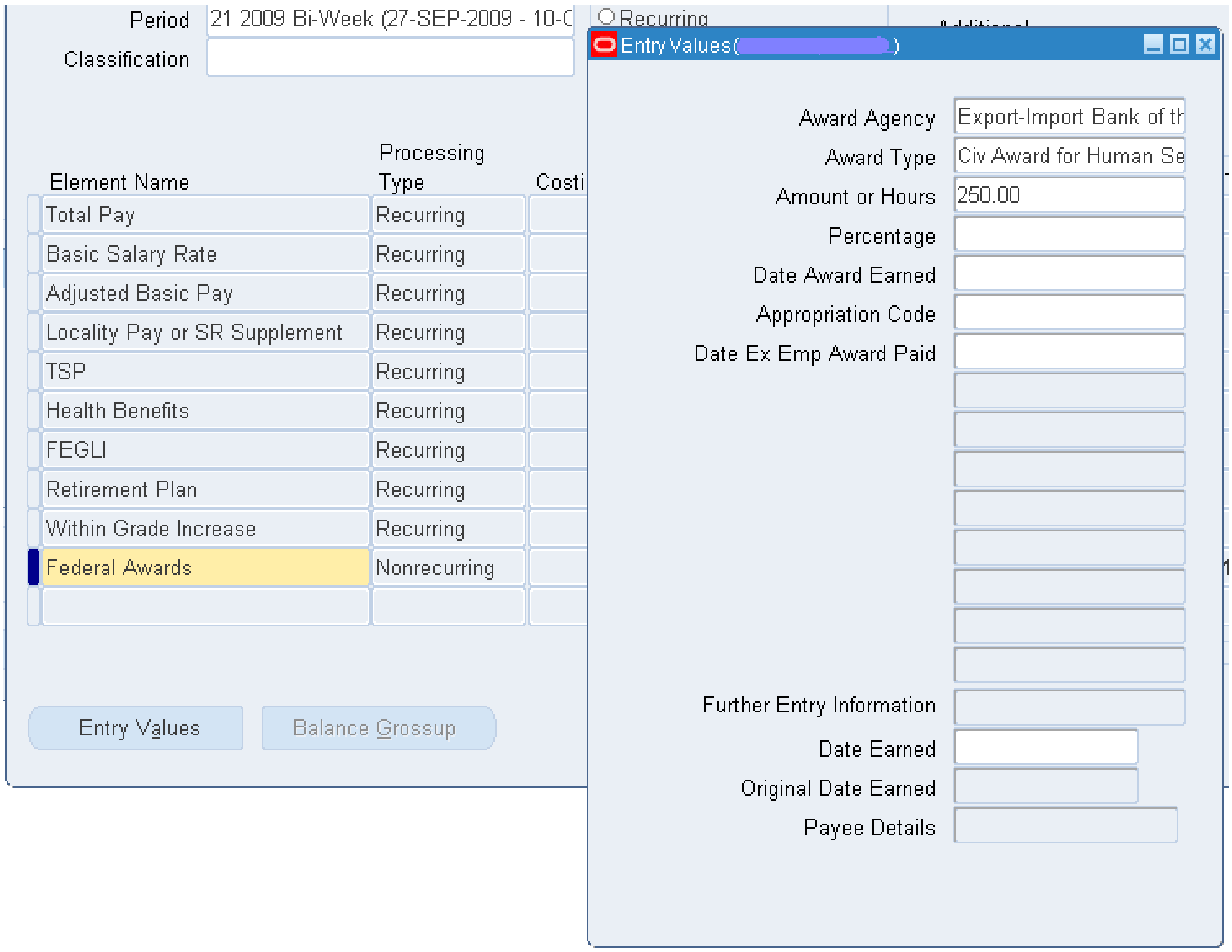
Click the Entry Values 

button on the **Element Entries** window to display the **Entry Values** window.

Entry Values Window



Step 7
Click the ***Entry Values*** data field or fields that need correcting. Use the List of Values (LOV)  button to update or type in the correct information.



Note: Only non-recurring awards that fall in the **current pay period** display in the Element Name data field. If it is outside the **current pay period**, date track to the date needed and make the correction.

Step 8
Close the window and return to the **Element Entries** window.

Step 9

Click the Save  button on the Toolbar and exit the window.

Or

On the Main Menu Bar, click **File → Save**.

Or

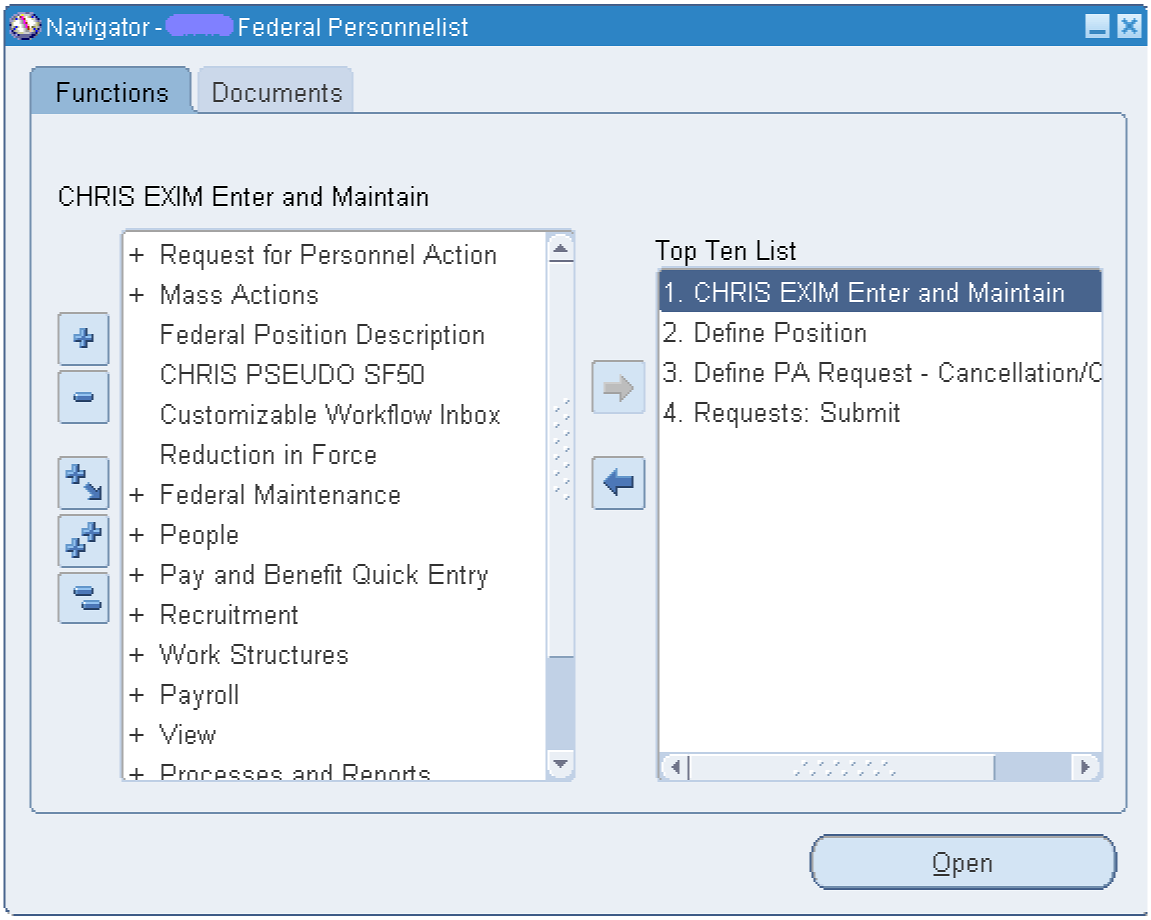
Click **File → Save and Proceed**.

STEP FOUR DELETING NON-MONETARY AWARD DATA

This section explains the process for deleting existing non-monetary award data if it is **__within the current pay period__**.

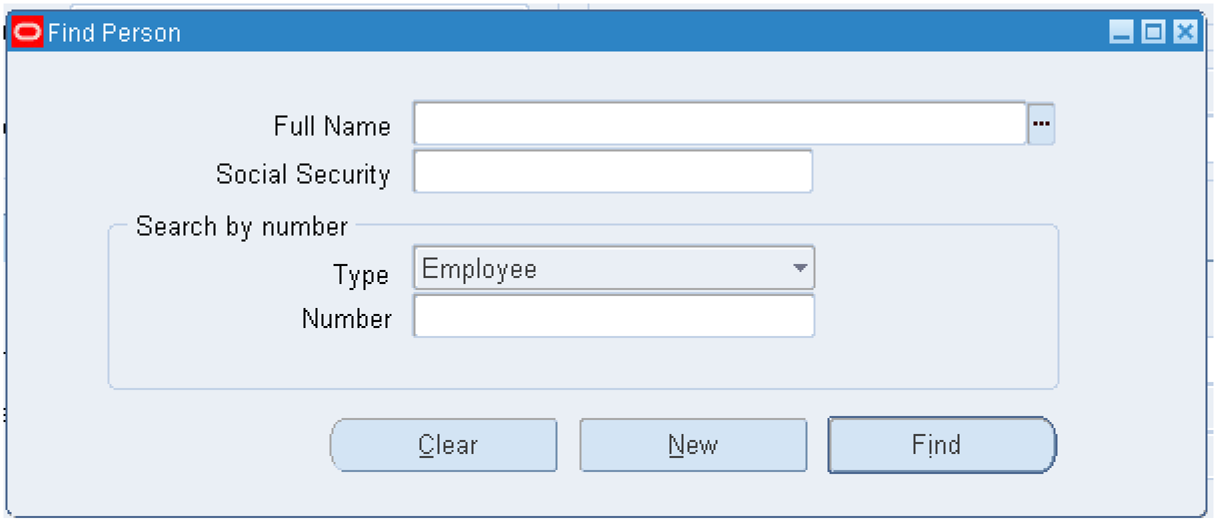
Step 1

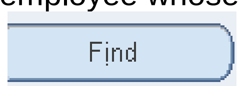
From the **Navigator → People → Select CHRIS Enter and Maintain**.



Step 2

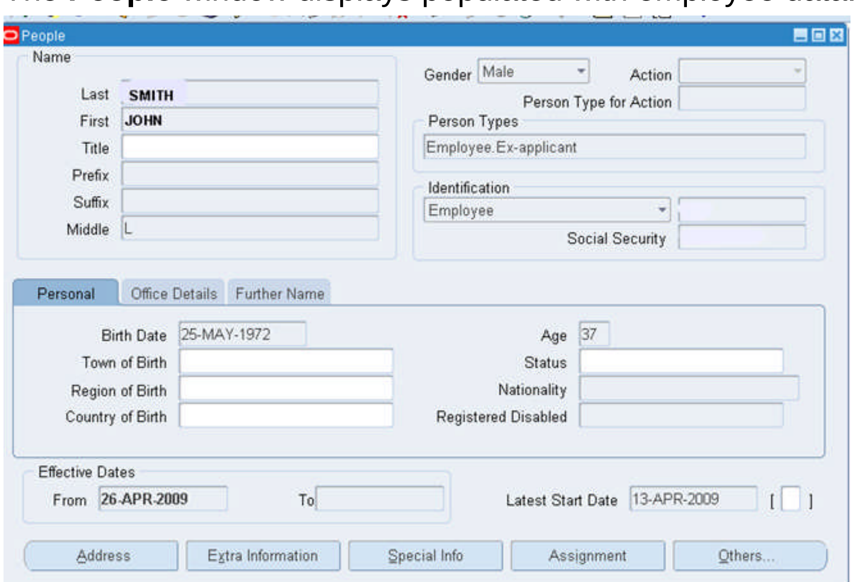
The **Find Person** window displays.



Query for the employee whose record you wish to update or type in the last name and click the Find  button.

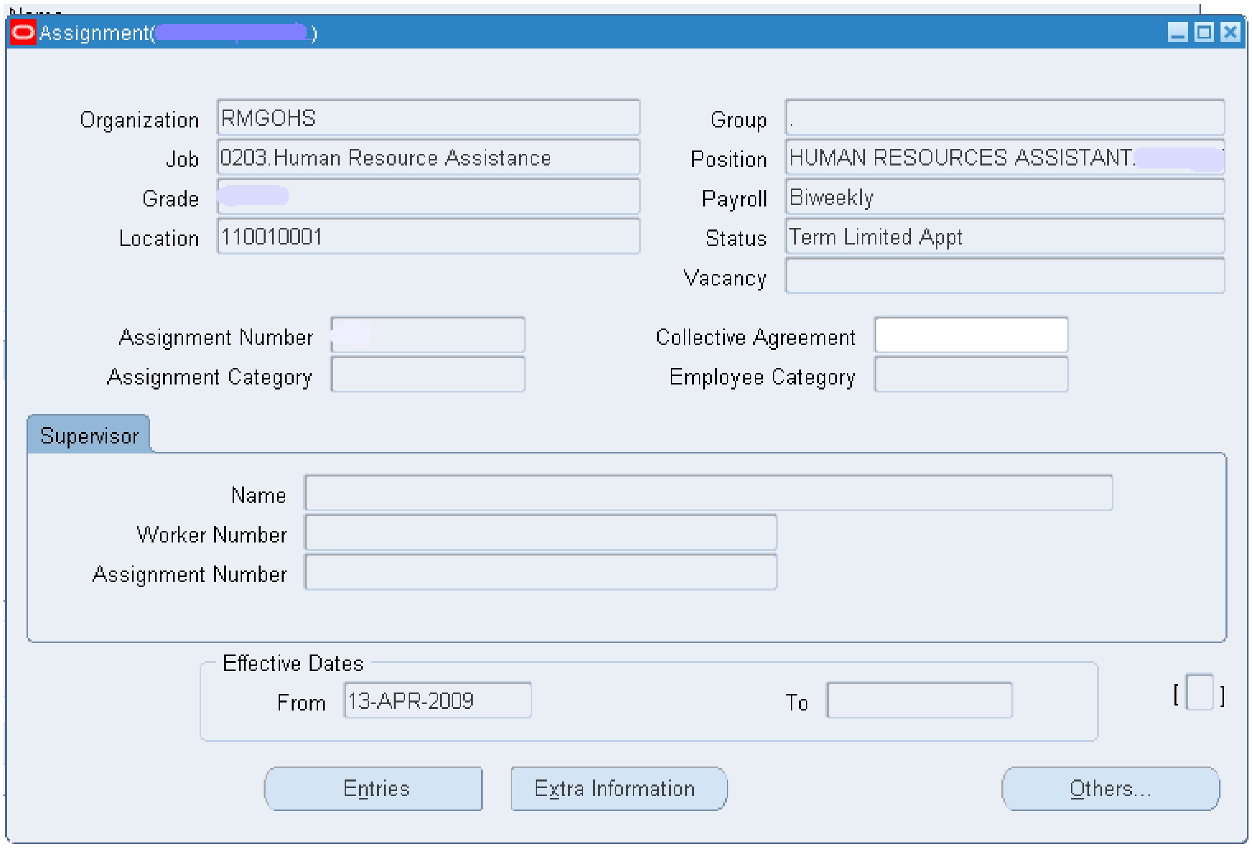
Step 3

The **People** window displays populated with employee data.



Click the Assignment  button.

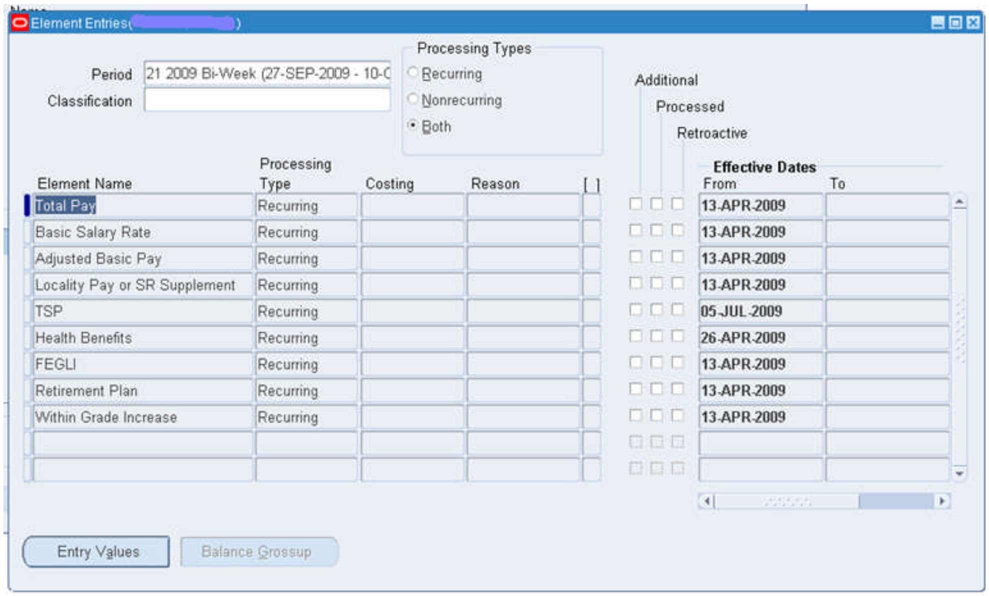
Step 4
The **Assignment** window displays with many of the data fields populated and/or grayed out.



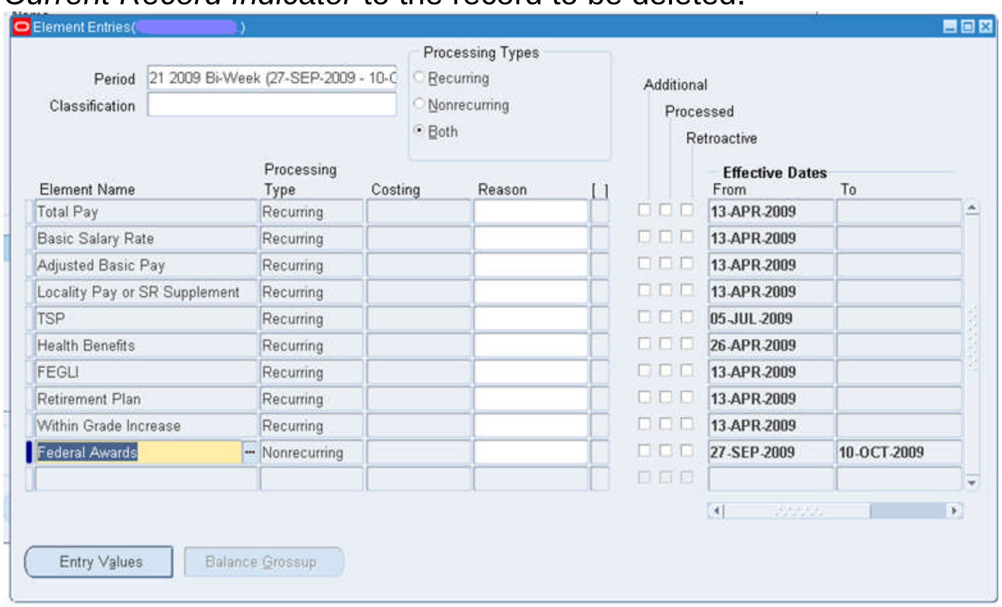
Click the Entries 

button.

Step 5
The **Element Entries** window opens.



Your cursor will be on the first data field in the ***Element Name*** column. Move the *Current Record Indicator* to the record to be deleted.



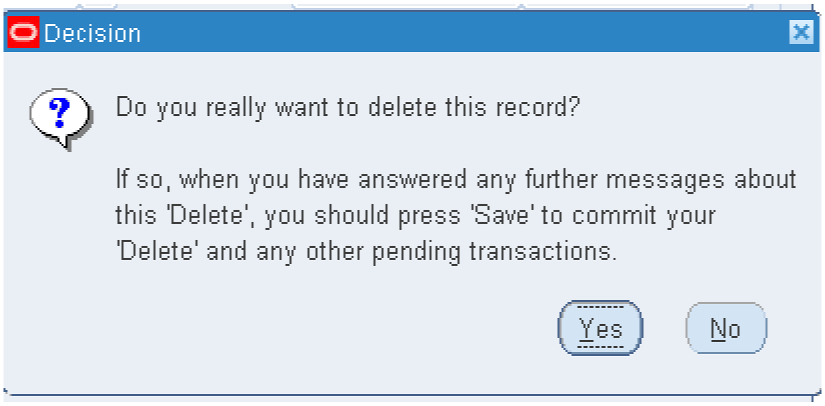
Step 6

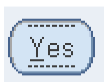
Click **Edit** on the Main Menu Bar AND **Delete** to delete the data field

Or

Click the Delete  button on the Toolbar.

A decision box will ask if you really want to delete the record.



Click the Yes  button.

Step 7

Click the Save  button on the Toolbar and exit the window.

Or

On the Main Menu Bar, click **File → Save**.

Or

Click **File → Save and Proceed**.

Note: If you deleted the Award ***Element Name*** data field by mistake, and you have not yet clicked **Save**; close the **Element Entries** window WITHOUT saving. Click **File → Close Form**. Click the NO  button when the dialog window asks if you want to save your data.