Job Aid for Change Pay and Labor and/or Timekeep

Description

- This job aid is intended to guide you through the online process for a Change Pay and Labor transaction to change a Tufts employee Timekeep, pay rate and labor distribution. This will be initiated by an approved submitter.

Key Steps/Activities to be performed

1. The approved Submitter Logs into PeopleSoft and clicks on the submit request tile from their landing page.
2. Administrator selects the Change Pay and Labor from the left-hand side navigation, which will begin the transaction and opens a window to allow the administrator to search for an employee.

3. You can search for the employee by name, employee id, position number or department.

4. Based on the search criteria, a list of employees will appear that the submitter has security access to. In the example below, the search was for “Simpson”.

![Image of HRBP Submit Requests interface showing search options for Change Pay and Labor.](image-url)
5. After selecting “Homer Simpson” from the list, the submitter will answer 3 questions about the changes they would like to make. If the question is answered “YES”, the submitter will be allowed to change the fields. The questions are:
   a. Are you changing the person’s timekeep?
   b. Are you changing the person’s pay rate?
   c. Are you changing the person’s labor distribution?

6. In our example, we have entered “YES” to all questions. This will allow the submitter to change the following fields. Since the Submitter selected “Yes” to the Timekeep question, the first page will show options to change Job Detail.
   a. Transactions Date – Enter the date the transaction is effective. Note if any part of your transaction is Retroactive, please contact TSS before proceeding
   b. Reason – Enter the reason for the change
   c. Enter the new timekeep number or description. In our example we have changed the timekeep to 708 – TEC net.
When completed the user will click on the NEXT button.

7. Since the submitter selected “Yes” to the pay rate question, the Compensation Detail page will be the next step to complete.
   a. The administrator can either enter the Change Percent, Change Amount, or New Amount. Based on the value entered in one field, the other two fields will be calculated.
   b. In our example, we have changed the percent to a 1% increase. This will also change the fields highlighted by the orange circle.
   c. Note: The Change Percent, Change Amount, and New Amount are based on the employees pay frequency.

8. The submitter also selected “Yes” to the Labor Distribution question, which is the next step to complete.
   a. The submitter will enter the new department the payroll cost will be distributed to.
   b. If the payroll is funded by a project or grant, the Project/Grant field will be entered.
   c. The percentage of payroll expense that should be distributed. Note: multiple rows can be added but must equal 100%.
9. The submitter will have a chance to review the changes that were made and add comments that they can reference in the future and will be included in the workflow transaction. After reviewing the transaction, the submitter will click on the submit button.

10. After the transaction is submitted, the submitter will receive a message that the transaction was submitted for approval. They can also view the approval workflow chain with a pending status.
All required approvals will appear in the Approval Chain. Upon completion of the Approval Chain, certain roles will be notified. The required approvals and the notified roles will vary based on the type of employee as shown below.

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Faculty</th>
<th>Staff</th>
<th>Student</th>
<th>Temp</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approvers</strong></td>
<td>Employee’s Supervisor (if involves a Timekeep change)</td>
<td>Employee’s Supervisor (if involves a Timekeep change)</td>
<td>Employee’s Supervisor (if involves a Timekeep change)</td>
<td>Employee’s Supervisor (if involves a Timekeep change)</td>
</tr>
<tr>
<td></td>
<td>OFA (if involves a Pay change)</td>
<td>HRBP and Compensation (if involves a Pay change)</td>
<td>LRA (if involves Grant Funding)</td>
<td>LRA (if involves Grant Funding)</td>
</tr>
<tr>
<td></td>
<td>LRA (if involves Grant Funding)</td>
<td>LRA (if involves Grant Funding)</td>
<td>OVPR Post-Award (if involves Retroactive Grant Funding)</td>
<td>OVPR Post-Award (if involves Retroactive Grant Funding)</td>
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<tr>
<td></td>
<td>OVPR Post-Award (if involves Retroactive Grant Funding)</td>
<td>OVPR Post-Award (if involves Retroactive Grant Funding)</td>
<td>Budget Center (if pay change is &gt;= $2,500)</td>
<td>Budget Center (if pay change is &gt;= $2,500)</td>
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<tr>
<td></td>
<td>Budget Center (if pay change is &gt;= $2,500)</td>
<td>Budget Center (if pay change is &gt;= $2,500)</td>
<td>TSS Tier 2 (if involves Pay or Labor Change)</td>
<td>TSS Tier 2 (if involves Pay or Labor Change)</td>
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<td>TSS Tier 2 (if involves Pay or Labor Change)</td>
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<td>TSS Tier 2 (if involves Pay or Labor Change)</td>
</tr>
<tr>
<td><strong>Notified</strong></td>
<td>Finance Office (if involves timekeep change)</td>
<td>Finance Office (if involves timekeep change)</td>
<td>Finance Office (if involves timekeep change)</td>
<td>Finance Office (if involves timekeep change)</td>
</tr>
<tr>
<td></td>
<td>HRBP (if a labor distribution is changing from all Hard Money to Grant Funding)</td>
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</tr>
</tbody>
</table>
11. The approver will receive an email that a transaction is waiting to be approved and they will also see the transaction in the pending approvals tile.
12. The approver should then select the transaction from the list. They can review the changes and comments before denying or approving the transaction. Once the final approver has approved the transaction, the employee’s job data information will reflect the changes.
Your request was approved by the approver below.

Approver Name: ____________________________
Transaction Name: Salary Change
Employee Name: Homer Simpson
Employee Id: 1042169

To view the status of this request, go to:


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