HOME DEPARTMENT CHANGE OR ADDING ALTERNATE HOME DEPARTMENTS

General Procedure

The procedures described in this section are for changing an employee's home department or adding an alternate home department. A home department is defined as the department in which most of the employee's work time is based. In the case of an employee working in two departments, the secondary home department must be entered so that department will be allowed access to the employee's record in the system.

A home department change is entered into the system via the EPER screen.

Reminder: Use <F1 Help> for assistance in entering data.

To Begin...

1. Access the Function Code Menu (EEDB).

2. At the next func line, type EPER to select Home Dept. Change or Transfer.

3. Type the ID number, name or social security number of the employee and press <Enter>. The EPER-Personnel/Miscellaneous screen displays the current employee data.
EPER (Personnel-Miscellaneous)

Data Element Definitions
(required data elements are highlighted)

Home Department:
Two-digit home department code. For employees working in more than one department, this is the primary department. If the employee is no longer affiliated with the current home department, change the home department code, if applicable. Press <F1 Help> to see valid codes.

Alternate Home Department Code:
Code indicating an alternate department that has the authority to update the employee's personnel record. If the employee is to be affiliated with another department, the current home department must add the alternate home department code. The home department may change the alternate home department code as needed to allow additional access to other alternate home departments. Press <F1 Help> to see valid codes.

Notes and Tips
- The alternate home department code is used only to allow a department other than the home department to access the employee record and add a new appointment. Once the database has been updated with the alternate department information, the alternate department now has access to the employee's record as long as the alternate department appointment is active.
Update the Employee Database (EDB)

1. Make sure you have completed all the required data elements on the screen.
2. Press <F5 Update> to add this employee record in the EDB.
3. If the update is successful, the EPER screen is displayed, with the following message: U0007 Update process complete

You are returned to the EPER screen so you can begin another home department action. Additional options are available as follows:

- To choose a different employee action, press <F3 Previous Menu> to return to the previous menu.
- To go to another function, move to the "Next Function" field and enter the new function code.
- To exit the Online Payroll/Personnel System, press <F12 Exit>. You will be returned to the CICS Application main menu.

4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (ECON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press <F3 Return> to return to the data entry screen to make the necessary corrections, or press <F2 Cancel> to cancel the update. If <F6 Next Msg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press <F5 Update>.

Each message displayed on the ECON screen has an associated severity level.

---

**FPECONG-EX943**
EBO Entry/Update 03/10/95 16:46:34
03/10/95 16:38:23 Consistency Edit Userid: PERING

Consistency Edit Number 108

Msg # Severity Message Text
08140 Expl Req INVALID ATTEMPT TO EXPLICITLY SET CHECK DISP TO 0

<table>
<thead>
<tr>
<th>DE Number</th>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0201</td>
<td></td>
<td>9</td>
<td>CHECK DISP CODE</td>
</tr>
<tr>
<td>0225</td>
<td></td>
<td>123456</td>
<td>SF BANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td></td>
<td>C</td>
<td>SF CHECK/SAVE</td>
</tr>
<tr>
<td>0227</td>
<td></td>
<td>i</td>
<td>SF DEPUTE 3ND</td>
</tr>
<tr>
<td>0230</td>
<td></td>
<td>12870</td>
<td>SF BANK KEY</td>
</tr>
</tbody>
</table>

U0005 Final edit errors found
==>
F: 1-Help 2-Cancel 3-Return 4-Print 5-Update
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and/or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.
NAME CHANGE

General Procedure

The procedures described in this section are for ...

A name change is entered into the system via the EPER-screen bundle.

Reminder: Use <F1 Help> for assistance in entering data.

To Begin ...

1. Access the Function Code Menu.

2. At the next func line, type EEID to select Employee Identification screen.

3. Type the ID number, name or social security number of the employee and press <Enter>. The EPER-Personnel/Miscellaneous screen displays the current employee data.

4. Tab to the name field and enter the name change.

5. F5 to update.
EEID (Employee Identification)

Data Element Definitions
(required data elements are highlighted)

First Name:
Enter correct first name, if applicable

Last Name:
Enter correct last name, if applicable

Notes and Tips
Update the Employee Database (EDB)

1. Make sure you have completed all the required data elements on the screen.
2. Press F5 <Update> to add this employee record in the EDB.
3. If the update is successful, the EEID screen is displayed, with the following message: U0007 Update process complete
   You are returned to the EEID screen so you can begin another name change action. Additional options are available as follows:
   • To choose a different employee action, press F3 <Previous Menu> to return to the previous menu.
   • To go to another function, move to the "Next Function" field and enter the new function code.
   • To exit the Online Payroll/Personnel System, press F12 <Exit>. You will be returned to the CICS Application main menu.
4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (ECON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press F3 <Return> to return to the data entry screen to make the necessary corrections, or press F2 <Cancel> to cancel the update. If F6 <NextMsg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press F5 <Update>.

Each message displayed on the ECON screen has an associated severity level.
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and/or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.
ADDRESS CHANGE

General Procedure

The procedures described in this section are for changing an employee's address.

Reminder: Use <F1 Help> for assistance in entering data.

To Begin ...

1. Access the Function Code Menu (EEDB).

2. At the next func line, type EPDL to select the Employee Personal Data screen, which displays the employee's address.

3. Type the ID number, name or social security number of the employee and press <Enter>.

4. Enter changes to the address as appropriate.
### Data Element Definitions
(required data elements are highlighted)

#### Permanent Address

**Line 1:**
First line of the address to which all University mail will be sent (e.g., benefits statement, tax information)

**Line 2:**
Automatic continuation of address Line 1, if the first line of the address is exceptionally long (e.g., use for apartment numbers, building names, etc.).

**City:**
City portion of the address. United States and foreign addresses.

**State:**
State portion of the address. United States addresses only.

**Zip:**
Zip code associated with the address. United States addresses only.

**Foreign Address Ind:**
Letter (F) indicating whether this is a foreign address.

**Prov:**
Foreign addresses only. Province associated with the address, if applicable.

**Cntry:**
Foreign addresses only. Two-digit country code associated with the

---

#### Notes and Tips

- This is the first of two screens which allow entry and update of personal information for an employee. Information such as home address, ethnicity, and citizenship status are entered at this screen.

- For rehires, only change those fields that need to be updated.
EPD1 (Employee Personal Data 1)

Data Element Definitions
(required data elements are highlighted)

Postal Code:
Foreign addresses only. Postal code associated with the address.

Work Location:
Where employee is physically located. Enter as appropriate.

Work Phone(s) 1:
Primary office telephone number at which the employee can be reached.

Phone 2:
If applicable. Secondary office phone number.

Notes and Tips
Update the Employee Database (EDB)

1. Ensure you have completed all the required data elements on the screen.

2. Press <F5 Update> to add this employee record in the EDB.

3. If the update is successful, the EDP1 screen is displayed, with the following message: U0007 Update process complete.

   You are returned to the EDP1 screen so you can begin another address change action. Additional options are available as follows:

   - To choose a different employee action, press <F3 Previous Menu> to return to the previous menu.
   - To go to another function, move to the "Next Function" field and enter the new function code.
   - To exit the Online Payroll/Personnel System, press <F12 Exit>. You will be returned to the CICS Applications main menu.

4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (ECON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press <F3 Return> to return to the data entry screen to make the necessary corrections, or press <F2 Cancel> to cancel the update. If <F6 Next Msg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press <F5 Update>.

Each message displayed on the ECON screen has an associated severity level.
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and/or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.
**W-4 CHANGE**

**General Procedure**

The procedures described in this section are for...

A tax withholding change is entered into the system via the ETAX screen.

**Reminder:** Use <F1 Help> for assistance in entering data.

**To Begin...**

1. Access the Function Code Menu (EBDB).

2. At the next func line, type ETAX to select Tax Information.

3. Type the ID number, name or social security number of the employee and press <Enter>. The ETAX-Tax Information screen displays the current employee data.

4. Tab to the field for the needed change.
ETAX (Tax Information)

Data Element Definitions
(required data elements are highlighted)

Federal
Marital Status:
For federal taxation, the marital status code indicated on the employee's W-4 Federal.

Personal Allowances:
For federal taxation, the total number of allowances indicated on the employee's W-4 Federal. (If the employee is claiming tax Exempt, enter 998; if the employee is under a tax treaty, enter 999.)

Maximum Withholding:
System-derived code indicating the total number of Federal exemptions the employee can claim.

State
Marital Status:
For state taxation, the marital status code indicated on the employee's W-4 State.

Personal Allowances:
For state taxation, the number of allowances indicated on the employee's W-4 State. (If the employee is claiming tax Exempt, enter 998; if the employee is under a tax treaty, enter 999.)

Itemized Deductions:
For state taxation, the number of additional allowances for estimated deductions indicated on the employee's W-4 State.

Notes and Tips
• This screen allows entry and update of tax information for an employee, such as federal and state withholding allowances, for example.
ETAX (Tax Information)

**Data Element Definitions**
*(required data elements are highlighted)*

**Maximum Withholding:**
System-derived code indicating the total number of State exemptions the employee can claim.

**Additional Withholding:**
- **Federal:**
  The total monthly amount of additional Federal tax the employee requests to be withheld from each paycheck. Enter an asterisk (*) to indicate no additional withholdings.
- **State:**
  The total monthly amount of additional State tax the employee requests to be withheld from each paycheck. Enter an asterisk (*) to indicate no additional withholdings.

**SSN:**
System-derived employee social security number

**Earned Income Credit Status:**
If applicable. Status indicated on a W-5 form for the employee.

---

**Notes and Tips**
- After completing all the required data entry fields on this screen, press <F11 Next Func> to continue to the next screen.
Update the Employee Database (EDB)

1. Ensure you have completed all the required data elements on the screen.

2. Press F5 <Update> to add this employee record in the EDB.

3. If the update is successful, the ETAX screen is displayed, with the following message: U0007 Update process complete.

   You are returned to the ETAX screen so you can begin another W-4 change action. Additional options are available as follows:
   - To choose a different employee action, press F3 <Previous Menu> to return to the previous menu.
   - To go to another function, move to the "Next Function" field and enter the new function code.
   - To exit the Online Payroll/Personnel System, press F12 <Exit>. You will be returned to the CICS Application main menu.

4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (ECON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press F3 <Return> to return to the data entry screen to make the necessary corrections, or press F2 <Cancel> to cancel the update. If F6 <NextMsg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press F5 <Update>.

Each message displayed on the ECON screen has an associated severity level.
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and/or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.
VISA CHANGE

General Procedure

The procedures described in this section are for ...

A Visa status change is entered into the system via the EALN screen.

Reminder: Use <F1 Help> for assistance in entering data.

To Begin ...

1. Access the Function Code Menu (EEDB).

2. At the next func line, type EALN to select Alien Information.

3. Type the ID number, name or social security number of the employee and press <Enter>.
The EALN-Alien Information screen displays the current employee data.
EALN (Alien Information)

Data Element Definitions
(required data elements are highlighted)

Citizenship:
System-derived code (entered on EPD1 screen).

Country of Residence:
Code indicating the country of residence for all aliens, except Permanent Residents of the United States.

Visa Type:
Type of visa held by the employee (all aliens).

Visa/Work Permit End Date:
Expiration date of the Visa or Green Card held by the employee.

For Payroll Use Only:
Tax Treaty Income Code:
Alt Tax Treaty Income Code:
Article Number:
End Date:

Income Limit:
Non-Resident Alien Tax Form Indicator:

Notes and Tips

- This screen allows entry and update of information related to the employee's citizenship status, and related information for employees who are not United States citizens, such as visa type, country of residence, and tax treaty information.
Update the Employee Database (EDB)

1. Ensure you have completed all the required data elements on the screen.
2. Press F5 <Update> to add this employee record in the EDB.
3. If the update is successful, the EALN screen is displayed, with the following message: U0007 Update process complete
   You are returned to the EALN screen so you can begin another Visa change action. Additional options are available as follows:
   • To choose a different employee action, press F3 <Previous Menu> to return to the previous menu.
   • To go to another function, move to the "Next Function" field and enter the new function code.
   • To exit the Online Payroll/Personnel System, press F12 <Exit>. You will be returned to the CICS Application main menu.
4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (ECON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press F3 <Return> to return to the data entry screen to make the necessary corrections, or press F2 <Cancel> to cancel the update. If F6 <NextMsg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press F5 <Update>.

Each message displayed on the ECON screen has an associated severity level.

<table>
<thead>
<tr>
<th>DE Number</th>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0201</td>
<td>8</td>
<td>023456</td>
<td>CHECK DISP CODE</td>
</tr>
<tr>
<td>0221</td>
<td>C</td>
<td>023456</td>
<td>SP BANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td></td>
<td>023456</td>
<td>SP CHECK/BANK</td>
</tr>
<tr>
<td>0227</td>
<td>1</td>
<td>023456</td>
<td>SP PENDING IND</td>
</tr>
<tr>
<td>0230</td>
<td>0</td>
<td>023456</td>
<td>SP BANK KEY</td>
</tr>
</tbody>
</table>

**00005 Final edit errors found**
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and/or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.
General Procedure

The procedures described in this section are for changing the code indicating the rate at which vacation and sick leave is accrued.

Reminder: Use <F1 Help> for assistance in entering data.

To Begin ...

1. Access the Function Code menu.

2. At the next func line, type EAPP to select the Appts/Distributions screen.

3. Type the ID number, name or social security number of the employee and press <Enter>. The EPER-Personnel/Miscellaneous screen displays the current employee data.

4. Tab to LV field and enter new code.
Appointment and Distribution Line Procedures

Use the following procedures to add or change appointments and/or distributions. When changes are required, this is indicated in Notes and Tips within the procedure:

Navigational Tips:

- The <Tab> key can be used to move the cursor from one modifiable field to another.
- To go directly to an existing appointment or distribution line; Type "GOTO nn" (i.e., nn = an existing appointment or distribution number) to place the cursor on the screen which contains information associated with the specified appointment or distribution number.

Ending the current appointment or distribution:

1. Tab to the Appointment End Date field and type the new end date.
2. If the Appointment Duration is "Tenured" or "Indefinite", type asterisk (*) to delete the current information.
3. If applicable, tab to the FTE field and type asterisk (*) to delete this information.
4. Tab to the Distribution End Date field and type the new end date.
5. Repeat for multiple distributions, if applicable.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

Rt:
Code indicating whether the rate of pay is hourly, annual, or by agreement. Press <F1 Help> to see valid codes.

Sch:
Code indicating the pay schedule on which the appointment will be paid, either hourly or monthly. Press <F1 Help> to see valid codes.

Time:
Code indicating the method for reporting time worked in the appointment. Press <F1 Help> to see valid codes.

Lv:
Code indicating the new rate at which vacation and/or sick leave will be accrued. Press <F1 Help> to see valid codes.

L/Acct/Fund/Sub:
Code indicating the full accounting unit to which pay will be charged for this appointment. Press <F1 Help> to see valid codes.

FTE:
If applicable. The percentage of the budgeted position which the distribution represents.

Dist %:
The anticipated percentage of time which is chargeable to the account/fund.

Notes and Tips
* Tab to LV field to enter correct Leave Code (F1) to see valid codes.
Update the Employee Database (EDB)

1. Ensure you have completed all the required data element on the screen.
2. Press <F5 Update> to add this employee record in the EDB.
3. If the update is successful, the EAPP screen is displayed, with the following message: **U0007 Update process complete**
   
   You are returned to the EAPP screen in the bundle so you can begin another leave accrual code change action. Additional options are available as follows:
   
   - To choose a different employee action, press <F3 Previous Menu> to return to the previous menu.
   - To go to another function, move to the "Next Function" field and enter the new function code.
   - To exit the Online Payroll/Personnel System, press <F12 Exit>. You will be returned to the CICS Application main menu.
4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (ECON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press <F3 Return> to return to the data entry screen to make the necessary corrections, or press <F2 Cancel> to cancel the update. If <F6 Next Msg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press <F5 Update>.

Each message displayed on the ECON screen has an associated severity level.

<table>
<thead>
<tr>
<th>SE Number</th>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0201</td>
<td></td>
<td>8</td>
<td>CHECK DISP CODE</td>
</tr>
<tr>
<td>0225</td>
<td></td>
<td>123456</td>
<td>SP BANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td></td>
<td>C</td>
<td>SP CHECK/SAVE</td>
</tr>
<tr>
<td>0227</td>
<td></td>
<td>1</td>
<td>SP PREMINS IND</td>
</tr>
<tr>
<td>0230</td>
<td></td>
<td>A1870</td>
<td>SP BANK KEY</td>
</tr>
</tbody>
</table>

Final edit errors found:

1. Help
2. Cancel
3. Return
4. Print
5. Update

UCR - LEAVE ACCRUAL CODE CHANGE
Rev’ on: 1.0
8.32
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and/or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.