Frequently Asked Questions

PTR Access and Approvals ............................................................................................................................... 4
Which roles do I need?.................................................................................................................................................. 4
How do I request access to these roles?................................................................................................................ 4
How do I become a Cost Center or Grant Manager approver in Workday? .......................................................... 4
How do I request Department Access? ................................................................................................................. 4
Will training be available or required? ................................................................................................................... 4

PTR General Functionality........................................................................................................................................ 5
Can the PTR be used for all employee classes (i.e. Faculty, Graduates, Staff and Student Workers)? ............... 5
What do I do with the paperwork from the employee (i.e. New Employee Payroll Packet, including the I-9)? .. 5
Should I process a DMX or a PTR? ....................................................................................................................... 5
What if the PTR is not able to process my transaction or there is an exception? ................................................... 5
What signatures do I need for the DMX? .................................................................................................................. 5
I approved a PTR but it still appears in my worklist and asks for approval. Why hasn't my approval gone through? .................................................................................................................. 5
What does this action/reason mean? ....................................................................................................................... 5
Which action/reason should I use? ......................................................................................................................... 5
The PTR will not let me change the pay rate when I am correcting the FTE. How do I submit both changes? ........................................................................................................................................... 5
Can multiple PTRs be created for the same employee? ........................................................................................ 6
What is the limit of back dating or future dating? ................................................................................................ 6
How do I archive a PTR I have cancelled? ............................................................................................................ 6
Why are my PTR options grayed out? ....................................................................................................................... 6
Is it okay if my PTR is future dated? ....................................................................................................................... 6
Which date should I use on the PTR? ....................................................................................................................... 6
I approved my PTR while payroll was open/during lockout. Will it be processed? ................................................... 6
The PTR will not allow me to submit a Job Data change with a mid-pay period effective date. How do I submit changes mid-Pay period? ........................................................................................................... 6

Common Error Codes ........................................................................................................................................ 6
Data being added conflicts with existing data (18,2) .............................................................................................. 6
Invalid Value 15,11 ................................................................................................................................................... 6
Data being updated does not exist 18,4 ...................................................................................................................... 7
Confirm creation of new PTR from canceled PTR (21025,31) ................................................................................. 7
CI Error ................................................................................................................................................................. 7

Online Renewals .................................................................................................................................................. 7
How does the online renewal process work? ........................................................................................................... 7
Should I process “renewals,” through the online module or through the PTR? ............................................. 7

What if I already processed a renewal via the online module but I also need an FTE change—how can I fix this? ............................................................................................................................................................. 7

Can I process a renewal online late? ............................................................................................................ 7

Position Management........................................................................................................................................ 8

If I update the position, will it automatically update job data?........................................................................ 8

Is Position Management part of the PTR? ........................................................................................................ 8

How do I change the title that appears on Outlook? ....................................................................................... 8

If I promote/reassign/transfer an employee by changing job code and keeping position the same will all the changes be reflected appropriately? ............................................................................................................. 8

I’m not receiving my e-mails for approval / I can’t see the PTR on my work list? ........................................... 8

Why do the changes in my position not have to be effective the same day as my hire? ............................... 8

After submitting ................................................................................................................................................. 8

Why does my PTR now reflect ‘hourly/non-exempt’ compensation details when I submitted with ‘salaried/exempt’ details? ............................................................................................................................................. 8

How long will it take to update the job data after the PTR is approved?........................................................ 8

Will I be able to track a PTR once it has been approved and archived? .......................................................... 8

All approvers have signed off on a PTR, but the transaction is still “Awaiting Further Approvals” or “Pending.” My approval won’t ‘stick.’ What is the issue? ............................................................................................................. 8

Do the PTR Pay data notes appear in the email with the PTR business notes? .............................................. 8

Will I (as an approver) be able to tell if I clicked “approve” or “return” once I reach the comments section? . . 9

Can we request changes to the PTR Dashboard? .......................................................................................... 9

Workflow Approval/Security............................................................................................................................... 9

Is PTR Originator driven by department access?.......................................................................................... 9

How does department access affect approval routing? ................................................................................. 9

What if I requested the role, but have not completed training; will I be able to create/submit transactions? .. 9

Must all approvers have security roles? ........................................................................................................ 9

I am trying to add the PTR Originator and PTR approval to my security roles and it keeps telling me that something has already been initiated? ............................................................................................................................................. 9

When requesting roles, can we still have access to all departments in our School? ..................................... 9

Is the PTR System linked to Workday to verify that the PTR Approver is currently a Cost Center or Grant Manager for the funding sources linked to the Position? ............................................................................................................. 9

Will the approver list in the PTR be automatically updated if an approver transfers out of the department?.. 9

Does the PTR Dean/VP Role also need to be a Cost Center/Grant Manager in Workday? .......................... 9

If a PTR action (hire, promotion, transfer) is funded from multiple sources, will the PTR approver need to be listed as an approver for all Cost Centers/Grants? ............................................................................................................. 10

Can one person have PTR Originator and PTR Approver role? .................................................................. 10

Can you have PTR Originator and PTR Dean/VP role? .................................................................................. 10
Can someone submitting as PTR Originator, also apply PTR Dean/VP approval? .................................................. 10
Can someone have PTR Approver and PTR Dean/VP level role? .................................................................................. 10
Can one person have the PTR Originator, PTR Approver, PTR Dean/VP level role? ....................................................... 10
Can a PTR Approver submit PTR Dean/VP level approval for the same transaction? .................................................. 10
I’m not receiving my e-mails for approval or can’t see the PTR on my work list? ............................................................. 10
What does this PTR status mean? .................................................................................................................................. 11
Common Payroll related Questions .................................................................................................................................. 12
Retro .................................................................................................................................................................................. 12
For audit purposes, how can I properly document a retro calculation that is set to manual? ........................................... 12
If I selected to pay a retro amount with the next on-cycle but need to request a manual check instead, how can I
communicate this information to payroll? .......................................................................................................................... 12
How do I submit a PAR? .................................................................................................................................................. 12
When we have specific questions or problems about pay data who should we contact? ................................................. 12
Additional pay/Cancellation ................................................................................................................................................ 12
I want to set up a non-taxable tech subsidy (TSN) but I do not see it in the menu? ............................................................... 12
How does pay work with additional payments that are cancelled mid-period (not on a pay period end date)? .................. 12
I need to change the additional pay goal amount for my employee before the end date. ..................................................... 12
I need to cancel an additional pay for my employee before the end date ........................................................................... 12
Can I extend the end date on my employee’s current additional pay? ................................................................................ 12
Why do I receive an error when I click on “Pay on Different Position”? ........................................................................ 12
Can I set up a TEC payment for the year through the PTR? ................................................................................................. 13
I have a large group that needs additional pay set up, can I send a spreadsheet to Payroll to set these up on my behalf? ............ 13
Termination VPO/CPO .......................................................................................................................................................... 13
If an employee’s vacation and/or comp time balance is incorrect and I plan to process a termination how should I address this? ......................................................................................................................................... 13
How should I address a vacation balance that is above the maximum payout upon terminating an employee; how can I
ensure the excess hours will be zeroed? .................................................................................................................................. 13
If I submit an Involuntary Termination how can I ensure the final check will be paid within 7 days, as required? ................. 13
Manual Checks ......................................................................................................................................................................... 13
How can I avoid paying an employee twice when attempting to request a manual check? .................................................. 13
Time Reporting ......................................................................................................................................................................... 13
If an employee earns overtime during a pay period and our department wishes to pay this out immediately, what steps should be taken? .................................................................................................................................................. 13
PTR Access and Approvals

Which roles do I need?
The security roles available are described below:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTR Originator</td>
<td>This role provides you with the ability to submit personnel transactions through the PTR.</td>
</tr>
</tbody>
</table>
| PTR Approver       | This role provides access to the work list to approve transactions at the cost center/grant manager level. The user must be listed as a PeopleSoft HR Cost Center and PeopleSoft HR Grant Manager in Workday to be able to apply for this role.  
(Approver and Originator cannot be the same person on an individual transaction) |
| PTR Dean/VP        | This role provides access to the work list to approve transactions at the Dean/VP level. Members of this role must be the Dean/VP or someone who has been designated by the Dean/VP to perform the approvals on their behalf. |
| PTR PROVOST/EVP    | This role provides access to the work list to approve transactions at the Provost/EVP level. Membership is limited and will only be granted if you have been designated by the Provost/EVP to obtain access to this role |

How do I request access to these roles?
Role requests are submitted in PeopleSoft. A link is also available in ServiceNow by navigating to Service Catalog > Security>Identity and Access Management> PeopleSoft Security and clicking on 'PeopleSoft – Submit a Role Request'. For additional instructions, please refer to the PTR BPG.

How do I become a Cost Center or Grant Manager approver in Workday?
Use the Approver Role Request on the Workday Landing Page to request the PS HR Cost Center or Grant Manager role in Workday.

How do I request Department Access?
Submit a ticket via ServiceNow to request department access. Provide dept code(s) and business justification in the ‘Additional Details’ field in the ticket. To navigate to the catalog item, go to Service Catalog > Security>Identity and Access Management> PeopleSoft Security and clicking on ‘PeopleSoft Security Department Access Request’.

Will training be available or required?
Self-paced online training is available in order for new users to obtain security access to the PTR Originator role — this class also contains some helpful information for approvers. This class is available online in Career EDGE.
1. Click “Browse Training” or under the “learning” menu header, select “learner home.”
2. Search for "PTR" and select the class called “Using the Personnel Transaction Request.”
3. Click on the "launch" button to start the course.
**PTR General Functionality**

The [PTR process guide is available online](#) and provides additional details regarding each subject mentioned below.

**Can the PTR be used for all employee classes i.e. Faculty, Graduates, Staff and Student Workers?**

Yes. For faculty, academic professionals, and graduates, all job transactions i.e. hires, transfers, promotions, terminations, etc. and payroll transactions i.e. additional pay, vacation payout, manual check, etc. will be submitted using the PTR. Most of these transactions for staff and students will also be submitted using the PTR.

However, there are some exceptions for staff and students since certain PTRs will be automated through the hiring process in Kenexa BrassRing. For staff/student, competitive hire or promotion/reassignment/transfer transactions will not be allowed through the PTR. Competitive recruitments for these employee types are processed through Kenexa and, once a candidate is moved into a position, the appropriate PTR transaction will automatically be created. If you attempt to create such competitive transactions through the PTR, you will either receive an error message and not be allowed to save or the option will not be available.

**What do I do with the paperwork from the employee i.e. New Employee Payroll Packet, including the I-9?**

The paper packet should be returned to Human Resources in person. Refer to the instruction within the New Employee Payroll Packet for addresses and contact information. The packet, including the I-9, must be submitted to HR on or before the first actual work day of the employee. Note: The I-9 should indicate the first work day. Contact the [Office of Human Resources](#) if you have questions.

**Should I process a DMX or a PTR?**

A chart is available to help determine which process should be used for a request. Unless the chart indicates that a DMX is required, best practice is to attempt to submit a PTR first. A DMX — [PTR exception form](#) — should be used if the job change you are requesting cannot be submitted in a PTR. You may also reach out to your data mgmt specialist to determine the correct process.

**What if the PTR is not able to process my transaction or there is an exception?**

For any exceptions and transactions that cannot be completed through the PTR, use the [PTR Exception form](#), also known as the DMX. Please note that transactions may take longer to process with this route since this is a manual process. Review the [DMX Guide](#) for additional information about completing and submitting an exception form. You may also reach out to your data mgmt specialist regarding PTR errors.

**What signatures do I need for the DMX?**

A DMX needs the same approvals as a PTR. The required signatures will depend on the action/reason you are requesting. Please refer to the [Approval Matrix](#) to determine which signatures you will need. If appropriate signatures are not obtained, the DMX will not be processed.

**I approved a PTR but it still appears in my worklist and asks for approval. Why hasn't my approval gone through?**

This error commonly occurs when a transaction is submitted and then the funding source is changed before all approvals are applied. To remedy this, please cancel the PTR and resubmit it. In the future, submit changes to position accounting before submitting a PTR to ensure proper routing and processing.

**What does this action/reason mean?**

Please see the [PTR BPG](#) for action/reason definitions.

**Which action/reason should I use?**

Please see the [PTR BPG](#) for action/reason to determine which action/reason is most fitting for the change you are requesting. If you are still unsure, please reach out to your HR representative.

**The PTR will not let me change the pay rate when I am correcting the FTE. How do I submit both changes?**

The PTR automatically changes salary for exempt/salaried employees in proportion to the FTE change. If an employee has an FTE , with proportionate pay change, and a separate pay change effective the same date, they are two distinct transactions. If the disproportionate FTE/pay change are effective in the [current pay period](#), two PTRs must be
submitted. The first PTR is for the FTE change, and then a second PTR is submitted to correct the pay. If the disproportionate FTE/pay change are backdated to a prior pay period, submit a DMX.

Can multiple PTRs be created for the same employee?
An empl record can have two open PTR transactions at a given time, however one must be a job transaction — promotion — and the other must be a payroll transaction — additional pay. However, if a PTR exists with both a job and pay transaction, such as a backdated promotion with retroactive pay, you will not be able to submit another request for job or pay changes on that empl record. Transactions can be processed on each record for employees with multiple job records, if applicable. You can also create multiple additional jobs for the same employee.

What is the limit of back dating or future dating?
200 days for backdated transactions and 120 days for future dated transactions.

How do I archive a PTR I have cancelled?
The archive option will not appear when the PTR is accessed through the worklist, however if it is brought up through this path in PeopleSoft:

The option to archive canceled PTRs will appear.

Why are my PTR options grayed out?
Either the employee has an active PTR that must be archived or certain PTR options not available for them based on paygroup, empl type, or payroll status. If you need assistance archiving a PTR, reach out to Data Management.

Is it okay if my PTR is future dated?
Yes, however unless it is a hire PTR it will not process to job data until the date has been met. Hire PTRs can process up to 10 days before the effective date. Be aware that if the PTR has been approved for a future date, no other PTRs can be submitted until it is processed.

Which date should I use on the PTR?
If you are unsure of which date to use on the PTR, please reach out to your HR representative. Termination effective dates are the last day worked plus one. For example, if their last day clocked in was 02/24, their termination effective date should be 02/25.

I approved my PTR while payroll was open/during lockout. Will it be processed?
Unless there is a risk for an overpayment, the PTR will not be processed until after payroll lockout.

The PTR will not allow me to submit a Job Data change with a mid-pay period effective date. How do I submit changes mid-Pay period?
This request would require a DMX. Keep in mind that using a mid-pay period date will result in the employee’s pay being prorated. Please see the DMX guide for further assistance.

Common Error Codes

Data being added conflicts with existing data (18,2)
This error usually means there is conflicting data in the employee’s HR data. Send the name and the Employee ID to datamanagement@asu.edu.

Invalid Value 15,11
The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button:

An invalid message indicates that the position entered cannot be used for the transaction selected. This may occur for a number of reasons. To determine the cause, you should:
1. Navigate to Position Management and first make sure that the position is marked as “Active.”
   a. If it is “Inactive,” you can request that Data Management activate it.
2. Ensure that the position effective date has passed. A position with a future dated effective date cannot be used until that date is reached.
3. Make sure the position is not Classified. If the position needs to be changed from Classified to University Staff, you need to modify it (see PM BPG).
4. Ensure that the position/job code is assigned an employee class that allows the PTR to be used for the transaction you have selected:
   a. Classified, University Staff, and Student positions cannot be hired through the PTR and offer limited Reasons for certain actions.
5. Confirm that the position is not in recruitment.
If you continue to receive this error, email Data Mgmt.

Data being updated does not exist 18,4
This is usually a system error – contact Data Mgmt if you receive this error.

Confirm creation of new PTR from canceled PTR (21025,31)
This is usually a system error – contact Data Mgmt if you receive this message and you are not attempting to create a new PTR from a canceled PTR.

CI Error
The PTR has been approved by all approval levels, but a system error occurred and it was unable to upload to PeopleSoft. Data Management will manually process the transaction or reach out to you if the request must be modified or resubmitted. See PTR status definitions.

Online Renewals

How does the online renewal process work?
The Online Renewal pages allow you to renew all or some of your employees who are currently on short work break or will be going on short break at the end of the current academic session. You will have the ability to indicate a start date, new pay frequency, and the new appointment period salary on the renewal page. Documentation must be maintained by your department and does not need to be submitted to Data Mgmt.

Renewal Submission and Renewal Approval are accessed on two separate pages. A user may have the roles to access both pages, but approval for a given request cannot be applied by the user who submitted the renewal.

Should I process “renewals,” through the online module or through the PTR?
The Online Renewal module in PeopleSoft is the preferred process since it is simpler, allows mass renewal, and is therefore usually faster. Data Management will activate Online Renewals in mid-April for SUM/WTR renewal. However, you may only renew an employee record once per semester through online renewal and will need to use the PTR for a second renewal for the same record. The PTR also allows more flexibility as you can select a new position or jobcode and/or adjust the standard hours at the time of renewal. Retroactive request must be entered via PTR. For more information, see the Online Renewal guide.

What if I already processed a renewal via the online module but I also need an FTE change — how can I fix this?
If you submitted a salary change via the online renewal module and are changing FTE to align with the new salary, the request will need to be submitted via DMX form. If the online renewal hasn’t processed yet, submit a Return from Short Workbreak via PTR using the correct FTE and salary.

Can I process a renewal online late?
No, the online renewal process will not generate retro pay. Online renewal will not allow a return date prior to the start of the current pay period. You may enter a PTR for a renewal with a backdated effective date and the retro amount will automatically generate.

Approval for a renewal effective in the current pay period must be applied before the payroll lockout deadline. If you missed the deadline, do not approve the renewal request and submit a PTR to return the employee from workbreak.
**Position Management**

If I update the position, will it automatically update job data?
Only Department code, Reports to, and Location will update. All other changes must be completed through PTR.

Is Position Management part of the PTR?
No. Position creation and changes are processed through Position Management in PeopleSoft. Job data will pull the Department code, Reports to, and Location from position. Job Data changes requested via the PTR will not update the data in position management.

How do I change the title that appears on Outlook?
If the employee’s job is changing, first update the jobcode on their position and then submit a PTR to update their Job Data and the corresponding working title will automatically update in outlook in 24-48 hours. If you want to refine the working title, you can do so through "Create/Modify positions."

If I promote/reassign/transfer an employee by changing job code and keeping position the same will all the changes be reflected appropriately?
Yes. You should update the position to reflect the new jobcode prior to submitting the PTR. After the PTR has processed, Job data will reflect the new job code so the new title, grade, etc. will be updated appropriately and reflected on the employee’s paycheck.

I'm not receiving my e-mails for approval | I can't see the PTR on my work list?
Check your junk mail or possibly another account signer has approved first. If the PTR has multiple approvers, only one approval of the same level is needed. Once it is approved, you will no longer see it on your Worklist.

Why do the changes in my position not have to be effective the same day as my hire?
For backdated job data changes, the PTR will use whichever position information is most recent in People Soft, even if the job data change is farther back than the position change. The exception to this is when the position has just been created and needs to be backdated to the hire date.

After submitting

Why does my PTR now reflect 'hourly/non-exempt' compensation details when I submitted with 'salaried/exempt' details?
When submitting or approving a Transfer, Promotion, or Reassignment PTR which changes an employee’s FLSA Status, the PTR will retain the employee’s former pay group and FLSA status until it can be systematically evaluated and set by the system. Each night, a batch process runs to evaluate and update the values on Job Data, based on jobcode attributes and the FLSA salary threshold, for this limited group of impacted employees. This will apply whether the employee’s pay rate is changing or not.

How long will it take to update the job data after the PTR is approved?
Most PTR transactions will automatically update job data and/or additional pay as soon as the final approval is complete, except for transactions that have a future effective date, contain a manual component, or if the transaction is submitted during payroll processing periods.

Will I be able to track a PTR once it has been approved and archived?
You can go to the PTR Dashboard and search by department and PTR status to review PTRs that have been archived.

All approvers have signed off on a PTR, but the transaction is still “Awaiting Further Approvals” or “Pending.” My approval won’t ‘stick’. What is the issue?
This error commonly occurs when a transaction is submitted and then the funding source is changed before all approvals are received. To remedy this, please cancel the PTR and resubmit it. In the future, submit changes to position accounting before submitting a PTR.

Do the PTR Pay data notes appear in the email with the PTR business notes?
No. Not at this time.
Will I (as an approver) be able to tell if I clicked "approve" or "return" once I reach the comments section?
No. The comments page does not indicate whether you chose to approve or return. You can choose to cancel on the comments page to return to the worklist and reselect approve or return as appropriate.

Can we request changes to the PTR Dashboard?
Please submit your request to datamanagement@asu.edu for consideration.

Workflow Approval/Security

Is PTR Originator driven by department access?
The PTR Originator Role uses department access to determine which employees and transactions will be available to you. Checking the “My Departments” box allows the user to only access people within their department security. If the “My Departments” box is unchecked the originator has access to all affiliates within the university, but the types of transactions are limited.

How does department access affect approval routing?
Although the HR dept code drives access to roles, it has no impact on the PTR Approver role. If you are cost center/grant manager for the funding source used and you have the role, you will be able to approve. However, the HR dept code access will impact the Originator and Dean/VP role. People in those roles will only be able to enter/approve for HR dept codes they have access to in PeopleSoft.

What if I requested the role, but have not completed training; will I be able to create/submit transactions?
You should complete training ASAP. Once approved, you can create/submit PTRs. If you do not complete training soon after requesting the role, your request will be revoked and you will have to reapply for the role.

Must all approvers have security roles?
Yes. Any approver requires a security role based on their level of approval, and may have multiple roles:
- PTR Approver. This role requires that the approver also be a signer in Workday on the Cost Centers/Grants listed in the PTR as pertaining to payroll for his or her department.
- PTR Dean/VP Approver. This role is restricted to Deans, VPs and their designees.
- PTR Provost EVP. This role is restricted to the Provost, EVPs and their designees.

I am trying to add the PTR Originator and PTR approval to my security roles and it keeps telling me that something has already been initiated?
There is an outstanding request that has not been approved. You may withdraw the request and submit a new request.

When requesting roles, can we still have access to all departments in our School?
Department access is requested separately from position and PTR roles. Please submit department access requests and inquiries via ServiceNow. Those who are at the top of their department tree should request access to a certain VP area i.e. *B13. Others in the department may only have access to a certain department i.e. B1344.

Is the PTR System linked to Workday to verify that the PTR Approver is currently a Cost Center or Grant Manager for the funding sources linked to the Position?
Yes, based on the current position distribution. A daily file updates the Workday approver information in PeopleSoft.

Will the approver list in the PTR be automatically updated if an approver transfers out of the department?
Yes. The PTR approvers are tied to cost centers/grants in Workday. Whenever position changes occur, such as a promotion, transfer, or termination, an employee’s access is revoked. The employee will need to reapply for Workday access with their new department, if applicable. The Workday approver information is updated in PeopleSoft once daily.

Does the PTR Dean/VP Role also need to be a Cost Center/Grant Manager in Workday?
No. Dean/VP routing is based on the role and department access.
If a PTR action — hire, promotion, transfer — is funded from multiple sources, will the PTR approver need to be listed as an approver for all Cost Centers/Grants?
No, but the PTR will automatically route to approvers for all cost centers and/or grants. If, for example, there are two cost centers with different approver lists, the transaction will require an approval from each group.

Can one person have PTR Originator and PTR Approver role?
Yes. However, the person cannot use both roles in a single transaction.

Can you have PTR Originator and PTR Dean/VP role?
Yes. As long as they complete the training for the Originator Role and the Dean/VP designates the originator for the Dean/VP role.

Can someone submitting as PTR Originator, also apply PTR Dean/VP approval?
Yes. They cannot be an originator and the first level approver on the same transaction, but they can, for instance, be the originator and the dean approver for the same transaction.

Can someone have PTR Approver and PTR Dean/VP level role?
Yes. As long as they are a cost center/grant manager in Workday and their dean has designated them for this role. They can act in both roles on any given transaction.

Can one person have the PTR Originator, PTR Approver, PTR Dean/VP level role?
Yes. However, they cannot act on the same transaction in all roles. There must be a separation of duties between the originator and the approver.

Can a PTR Approver submit PTR Dean/VP level approval for the same transaction?
Yes. You can be an approver and a dean/VP level approver on the same transaction.

I'm not receiving my e-mails for approval or can’t see the PTR on my work list?
Confirm with the originator that you are listed as an approver, check your junk mail and notify Data Mgmt if the emails are not being received. If the PTR has multiple approvers, only one approval of the same level is needed. Once it is approved, you will no longer see it on your Worklist.
## What does this PTR status mean?

<table>
<thead>
<tr>
<th>Status</th>
<th>What it means to you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft (D)</td>
<td>A PTR was started by you, but not yet submitted for approval.</td>
</tr>
<tr>
<td>In-Process (I)</td>
<td>The PTR is waiting for all the approvals to be gathered for the transaction to be uploaded into job data. To find out which specific level of approval is needed, click on the “View Approvers” icon.</td>
</tr>
<tr>
<td>Returned (R)</td>
<td>The PTR was returned by one of the approvers because the PTR needs editing.</td>
</tr>
<tr>
<td>Canceled (X)</td>
<td>The PTR was canceled by the originator and is waiting for the archive process to run to archive the information.</td>
</tr>
<tr>
<td>Approved (A)</td>
<td>The PTR has gone through all workflows and is approved.</td>
</tr>
<tr>
<td>Work in Process (W)</td>
<td>Used when partial transactions are processed and when the PTR Updater starts to process the PTR.</td>
</tr>
<tr>
<td>Batch (B)</td>
<td>For PTR with a Work in Process status, this status appears for individual pieces of a job when you click on the status hyperlink. It means the PTR was approved by all levels of approval, but is for a future effective date or payroll is open. These PTRs are staged in this status until the effective date of the PTR is met or payroll has closed. PTRs in this status can still be canceled by the originator.</td>
</tr>
<tr>
<td>CI in Process (U)</td>
<td>A PTR should only appear in this status briefly during the time it is being applied to Job. Before the CI processing starts, the PTR status will be set to this value. If it errors, it should be set to ‘E’, if it is successfully processed, the status should be set to ‘P’.</td>
</tr>
<tr>
<td>CI Error (E)</td>
<td>The PTR has been approved by all approval levels, but a system error occurred and it was unable to upload to PeopleSoft. Data Management will manually process the transaction.</td>
</tr>
<tr>
<td>Manual (M)</td>
<td>The PTR has been approved by all levels of approval, but an exception was identified for the PTR or pieces of the PTR. Data Management will manually process your transaction.</td>
</tr>
<tr>
<td>Processed (P)</td>
<td>The PTR has successfully uploaded to PeopleSoft and the transaction will be archived when the archive process runs.</td>
</tr>
</tbody>
</table>
Common Payroll related Questions
If you have questions about the status or processing of the Pay Data tab of your PTR, please reach out to your Payroll Representative.

Retro

For audit purposes, how can I properly document a retro calculation that is set to manual?
Your payroll representative will contact you with the calculated amount for a manual retro.

If I selected to pay a retro amount with the next on-cycle but need to request a manual check instead, how can I communicate this information to payroll?
If you are attempting to change to a manual check during lockout, while payroll is open, it may be too late to process this change. However if you are switching to a manual check prior to the deadline you should contact your Payroll Representative and will likely need to submit a Payroll Action Request. Please remember a service fee is associated with a manual check.

How do I submit a PAR?
Please reach out to your Payroll Representative for assistance with submitting PARs.

When we have specific questions or problems about pay data who should we contact?
Please reach out to your Payroll Representative for assistance regarding pay data such as additional pay, vacation or comp time payout, time reporter, or manual check.

Additional pay/Cancellation

I want to set up a non-taxable tech subsidy but I do not see it in the menu?
The TSN code is not available on the PTR due to automatic processing which conflicts with federal requirements. In order to create this type of additional pay for an individual, please submit a PAR. If you have many employees that require this earnings code, please send a spreadsheet to your Payroll representative indicating the beginning and end date, monthly amount, and total goal amount.

How does pay work with additional payments that are canceled mid-period, not on a pay period end date?
Additional payments do not prorate so the employee will be paid the entire amount for the final check, even if terminated early in the pay period i.e. on Tuesday. If you want to prorate the final additional pay, please explain in the PTR notes and notify your payroll representative. To avoid paying additional pay on the final check, please submit an additional pay cancelation PTR in the pay period prior to the upcoming termination.

I need to change the additional pay goal amount for my employee before the end date.
For an existing additional pay, please ensure that the last payment has been fully paid and submit a PTR to cancel the current payment using previous pay period end date. Once approved, you may then submit another PTR for a new payment.

I need to cancel an additional pay for my employee before the end date.
To cancel an additional pay, please ensure that the employee has received the last payment and submit a PTR using the previous pay period end date before the deadline so that this may process timely.

Can I extend the end date on my employee’s current additional pay?
You may wait until the current additional pay has completely paid then submit a new request or submit a PTR to cancel the existing additional pay. Once approved, you may submit a new PTR additional pay request.

Why do I receive an error when I click on “Pay on Different Position?”
This button should only be used to pay an employee from an outside department on one of your positions or for an outside department to pay one of your employees on one of their positions for a short term service e.g. taught a seminar performed. If you wish to pay a specific earnings code e.g. Stipend from a separate position within your department, you should go to Maintain Position Accounting and set up earnings-specific distribution for the earnings code on the employee’s current position.
Can I set up a TEC payment for the year through the PTR?
Yes, select Additional Pay on the splash page and enter the Start Date and the appropriate amount of pay periods for the year.

I have a large group that needs additional pay set up, can I send a spreadsheet to Payroll to set these up on my behalf?
Please use the PTR if possible for individual employees’ additional pay requests or contact your payroll representative to discuss.

**Termination VPO/CPO**

If an employee’s vacation and/or comp time balance is incorrect and I plan to process a termination how should I address this?
If an employee’s balance is greater than the maximum payout and still will be after being corrected, then this is a non-issue. If this is not the case, departments should submit a PTR for Leave Accrual Adjustment to correct the balances prior to submitting the termination PTR.

How should I address a vacation balance that is above the maximum payout upon terminating an employee; how can I ensure the excess hours will be zeroed?
Vacation Payouts are manually processed by Payroll and any excess hours will be corrected during review.

If I submit an Involuntary Termination how can I ensure the final check will be paid within 7 days, as required?
Payroll runs a daily report to find involuntary terminations and will be responsible for producing the final check in a timely manner. Departments need to select an action reason that is “involuntary” for the report to pull correctly.

**Manual Checks**

How can I avoid paying an employee twice when attempting to request a manual check?
Hours should be entered and approved in time and labor and the Manual Check Request must be approved by the normal payroll deadline, Thursday at 5 pm (see payroll calendar for holiday schedule). Otherwise, these hours will pull into the current payroll and pay on the upcoming pay day.

**Time Reporting**

If an employee earns overtime during a pay period and our department wishes to pay this out immediately, what steps should be taken?
For this situation please contact your Payroll Representative. Depending on your circumstances you may need to address this in time and labor using special Time Reporting Codes.