**PTR Frequently Asked Questions:**

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PTR Access

Will new roles be needed?

Security is the same, but roles will be required for new employees. The security roles available are described below:

<table>
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<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>
<tr>
<td>PTR Approver</td>
<td>This role is used to apply department (agency/org) approval to PTR transactions.</td>
</tr>
<tr>
<td></td>
<td>(Approver and Originator cannot be the same person on an individual transaction)</td>
</tr>
<tr>
<td></td>
<td><em><strong>Approvers must also be Advantage Account Signers. This is based on the position distribution.</strong></em></td>
</tr>
<tr>
<td>PTR Dean/VP</td>
<td>This role is used to apply Dean/VP level approval to PTR transactions.</td>
</tr>
<tr>
<td>PTR PROVOST/EVP</td>
<td>This role is used to apply Provost/EVP level approval to PTR transactions.</td>
</tr>
</tbody>
</table>

How do I request access to these roles?

To learn how to request a role, go to: [How to Submit a PeopleSoft Role Request](#).

When should I request the new role(s)?

Employees who will need a role should apply as soon as possible in order to be available sooner.

Who should I list as my approver in the security request?

Please consult with your department in determining who is authorized to approve the security request. The security access request forms for faculty or staff who are applying for the Dean/VP role should be approved by the Dean/VP. If the Dean/VP wishes to delegate the approval of the security requests, please send an email to [datamanagement@asu.edu](mailto:datamanagement@asu.edu). The email should include documentation that the Dean/VP has authorized the delegation of this authority.

How do I become an Advantage Account Signer?

Please visit the [Advantage website](http://advantage.asu.edu) and review the access request procedures.

Will there be training provided and when is it?

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). In order to sign up, go to [http://links.asu.edu/ptr](http://links.asu.edu/ptr) and click Submit, then OK. Follow the instructions within the course. Additional training materials can be found on the [PTR website](http://ptr.asu.edu).
PTR General Functionality

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

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 Data Management Exception form. Please note that transactions may take longer to process with this route since this is a manual process.

I want to hire a former ASU employee but I could not pull up anything on the PTR Search page even though I uncheck “My Department” box.
Former ASU employees whose positions were terminated prior to the PeopleSoft implementation date (7/1/2007) will have a “Conversion” row in Job Data. It will not show the person’s job record when you do the search. You will need to complete a Data Management Exception form in order to hire this person.

Can multiple PTRs be created for the same employee?
You may create two PTRs for each Empl Rcd at the same time, but one must be a job transaction and the other must be a payroll transaction. For example, a promotion for Empl Rcd #0 and an additional pay for Empl Rcd #0 is possible for a specific employee. Not only that, but transactions can be processed on each record for employees who have 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.
Online Renewals

How does the online renewal process work?
Data Management no longer approves or returns to departments. If on SWB, the employee record must be returned from SWB before any FTE changes or job title changes can be submitted for position modification. Documentation does not have to be submitted to Data Management but be sure and keep those hard copies in your department.

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 once per semester through online renewal and will need to use the PTR for a second renewal for the same employee. Also, the PTR allows more flexibility in renewals as you can elect to transfer and/or adjust the standard hours at the time of renewal. For more information, see the training guide for return from short work break.

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.

You can also submit renewals via PTR.

Can I process a renewal online late?
The 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.
**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 select to pay a retro amount on the next on-cycle upon submitting a PTR, but then I change my mind and wish to pay on a manual check, how can I communicate this information back to payroll?
This depends on timing. It may be too late to change your mind if the payroll process has already begun. However, if you change your mind prior to the deadline you should contact your Payroll Representative and will likely need to submit a Payroll Action Request (PAR). Please remember a service fee is associated with a manual check.

Can I still submit a PAR?
Yes. The PAR can still be used for limited transactions such as pay or leave adjustment for a terminated employee.

When we have specific questions or problems who should we contact?
Please forward your questions to email address datamanagement@asu.edu, and your issue will be addressed as soon as possible.
Additional pay/Cancellation

I want to set up a non-taxable tech subsidy (TSN) 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 or DMX. 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 cancelled 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/or contact 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.

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 and the account you want it paid from.

I have an employee that is given a supplemental pay for work done outside of normal job duties that is paid in hours, how do I address this via the PTR?
Additional payments cannot be paid by hours (including supplemental). You may create a supplemental pay for this but you will need approval from Carol Hurst (keep in mind the hours cannot be reported this way). If you want the hours reported, then this needs to be addressed in time and labor. The hours should be reported normally and any overtime will be accrued as comp time. Either way, an agreement should be established between the employee and department. The way in which the supplement is paid should be to the employee’s (not employer’s) benefit.

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. If you have large groups needing additional payments, send a spreadsheet to your payroll representative. Please include the same level of approvals required for a PTR, by email with the spreadsheet.
Position Management and Job code

Why am I receiving an “Invalid” message when I try entering a position number in the PTR?

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:

- Navigate to Position Management and first make sure that the position is marked as “Active.”
  - If it is “Inactive,” you can request that Data Management activate it.
- Ensure that the position effective date has passed. A position with a future dated effective date cannot be used until that date is reached.
- Due to the conversion to University Staff, make sure the position is no longer Classified.
  - If the position needs to be changed from Classified to University Staff, you need to modify it (see PM BPG).
- Ensure that the position/job code is assigned an employee class that allows the PTR to be used for the transaction you have selected:
  - Classified, University Staff, and Student positions cannot be hired through the PTR and offer limited Reasons for certain actions.

Is Position Management part of the PTR?

No. Position creation and changes will be processed through Position Management in PeopleSoft. Job data will pull the Department code, Reports to, and Location from position. The ability to make job code changes, however, is available on the PTR and is no longer coupled with position.

How is position useful to me now that job code and position have been decoupled?

Position Management should be used as the starting point for new hires and competitive promotions/reassignments/transfers for University Staff, and Student workers. Position should also be used for funding changes as accounting is tied to position. In addition, Department Code, Reports to, and Location are pulled into job data from Position.

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

Yes. Job data pulls information from job code so the new title, grade, etc. will be updated appropriately and reflected on the employee’s paycheck.

How do I change the title that appears on Outlook?

When you change a job code on a PTR, Data Management will automatically update the corresponding working title in position management. Outlook will then reflect the job code title. If you want to refine the working title, you can modify it through the PTR on applicable transactions.
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 balance(s) 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 will run a daily report to find involuntary terminations and will be responsible for producing the final check in a timely manner. Departments will 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.

Workflow Approval/Security
Is PTR Originator driven by department access?

The Originator Role is based upon your access to the role. You must complete training to have the role activated. The My Department’s checkbox being checked allows the user to only access people within their department security. If the My Department’s checkbox is unchecked the originator has access to all affiliates within the university, but transactions you can submit are limited.
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 transactions. However, if you do not complete training soon after, your security role request will be revoked and you will have to re-apply 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 Advantage on the accounts 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 by requesting access to *B13?
This is determined by your role level security already established in PeopleSoft. Those who are at the top of their department tree should request access to a certain VP area. Others in the department may only have access to a certain department (i.e. B1344).

Is the PTR System linked to Advantage to verify that the PTR Approver is currently an Org Signer for the account linked to the Position?
Yes. It is based on the position distribution.

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 account signers in Advantage. Whenever position changes occur, such as a promotion, transfer, or termination, the employee’s RACF access (which allows access to Advantage) is revoked. The Advantage Helpline then reviews. With few exceptions, the signer and/or org manager is removed from all accounts and the ID is deleted. The employee will need to reapply for Advantage access with their new department, if applicable.

Does the PTR Dean/VP Role also need to be an Advantage Account Signer?
No.

If a PTR action (hire, promotion, transfer) is funded from multiple accounts, will the PTR approver need to be an Advantage Account signer on all accounts?
No, but the PTR will automatically route for approval for all accounts. If, for example, there are two accounts with different groups of signers, it will require approval from both groups of signers. Although the HR dept code drives access to roles, it has no impact on the PTR Approver role. If you are a signer on the account 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.
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 delegates the originator for the Dean/VP role.

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

Can someone have PTR Approver and PTR Dean/VP level role?
Yes. As long as they are an account signer in the advantage tables and their dean has designated them to get 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, he/she 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?
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.
After submitting

All approvers have signed off on a PTR, but the transaction is still “Awaiting Further Approvals” or “Pending.” 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. The PTR requires approval for the new accounts but since these accounts were tied to the position after the PTR was submitted, they do not appear on the transaction or route to all the correct approvers. To remedy this, please cancel the PTR and resubmit it. In the future, submit changes to position accounting before submitting a PTR.

What does “In Process/No Pending Steps” mean on my PTR work list?

It means someone in the approval flow has denied the PTR instead of approving it. It should read “Returned”. If you click on the “No Pending Steps” link under the Workflow Step heading, you will see the details (i.e. PTR 00000076543 Denied). This will be fixed in the future.

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

No, not at this time. This is planned for future enhancements.

How long will it take to update the job data after 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?

To a certain extent you can via the dashboard using PTR ID and employee ID. However, you will only be shown certain details, not the entire transaction. You will be able to see what type of transaction and some of the other details like FTE, effective date, salary, and approval history.

I have the PTR approver role and I wanted to see all the PTRs that I approved before.

You can go to the PTR Dashboard and search by department and PTR status.

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 re-select approve or return as appropriate.

Can we request changes to the PTR Dashboard?

Please submit your request to datamanagment@asu.edu for the request to be assessed.
What does this PTR status mean?

<table>
<thead>
<tr>
<th>Status</th>
<th>What it means to you</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial Status</strong></td>
<td></td>
</tr>
<tr>
<td>Draft (D)</td>
<td>A PTR was started by you, but not yet submitted for approval</td>
</tr>
<tr>
<td><strong>Status while in workflow</strong></td>
<td></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><strong>Status once in process</strong></td>
<td></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><strong>Status once fully approved</strong></td>
<td></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><strong>Final status once approved and CI processing starts</strong></td>
<td></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>