

## Quick Reference Guide

# Personnel Transaction Request (PTR)

A quick guide to perform a variety of job transactions (Hire, Promotion, Termination, etc.) and payroll transactions (Additional Pay, Leave Adjustments, Overpayments) for Faculty, Graduates, Academic Professionals, Students and Staff using the PTR application

## HR Data Management Contacts

Please refer to the Data Management staff directory, <http://cfo.asu.edu/fs-dm-staff>, for the Data Management Specialist responsible for your department.

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## Process a Hire

(Faculty, Academic Professionals, Post Doc – with or without an additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Position Number
- Effective Date - Start date
- End Date
- Salary
- Recruitment Type
- Additional Pay details (if applicable)

A hire occurs when a department has selected a new employee to work in a position and the employee has no job records yet. Be aware that new employees will be required to complete an I-9 form.

If the employee has any inactive (former) or active job records, please refer to the Rehire or Hire Additional Job training material.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*You will be taken to the Main Page*

3. Review the **Personal Data** section of the PTR for accuracy.
4. Enter the **Position** number you will hire the individual on.
5. Review the **position details** that populate for accuracy.
6. Enter the Start Date in the **Effective Date** field.
7. Enter the End Date in the **End Date** field (if applicable).
8. Enter the **Salary** and then tab out.
9. Click on the **Additional Pay** checkbox (if applicable).
10. Change the **Position Working Title** (if applicable).
11. Select the **Recruitment Type**.
12. Enter a **PTR Business Note** (if applicable).
13. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected (view the Table of Contents and refer to the Additional Pay steps for details).
14. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

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## Process a Rehire

(Faculty, Academic Professionals, Post Doc – with or without an additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Position Number
- Effective Date - Start date
- End Date
- Salary
- Recruitment Type
- Additional Pay details (if applicable)

A rehire occurs any time a department reuses an inactive employee job record. This action will need to be taken when you have an employee who has once worked at the university and you intend to hire them back to the university into a job with the same benefits eligibility as an old job record.

This action will also need to be taken when you have an active employee with multiple job records and you intend to hire back an inactive record. In either case, the reused record must have the same benefits eligibility as the new job. For employees that do not have any active job records in the system, the employee will be required to complete a new I-9 form.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*Search results may appear and list the employee records this person has or has had with ASU. Select the emplid of the terminated "T" employee record you would like to take action on.*

*If the employee has only had one job with ASU search results will not display (skip step 3).*

3. Select the terminated employee record that you would like to rehire.

*You will be taken to the Main Page.*

4. Enter the **Position** number you will hire the individual on.
5. Review the **position details** that populate for accuracy.
6. Enter the Start Date in the **Effective Date** field.
7. Enter the End Date in the **End Date** field (if applicable).
8. Enter the **Salary** and then tab out.
9. Click on the **Additional Pay** checkbox (if applicable).
10. Change the **Position Working Title** (if applicable).
11. Select the **Recruitment Type**.
12. Enter a **PTR Business Note** (if applicable).
13. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay steps for details).
14. When finished, click the **Save & Send for Approval** button to submit the PTR.

## Process a Hire (Additional Job)

(Faculty, Academic Professionals, Post Doc – with or without an additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Position Number
- Effective Date - Start date
- End Date
- Salary
- Recruitment Type
- Additional Pay details (if applicable)

This action is used when an employee Already has a job at ASU and is obtaining another job.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Click the **Create Additional Job** checkbox on the Search Page.
3. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*You will be taken to the Main Page*

4. Enter the **Position** number you will hire the individual on.
5. Review the **position details** that populate for accuracy.
6. Enter the Start Date in the **Effective Date** field.
7. Enter the End Date in the **End Date** field (if applicable).
8. Enter the **Salary** and then tab out.
9. Click on the **Additional Pay** checkbox (if applicable).
10. Change the **Position Working Title** (if applicable).
11. Select the **Recruitment Type**.
12. Enter a **PTR Business Note** (if applicable).
13. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay steps for details).
14. When finished, click the **Save & Send for Approval** button to submit the PTR.

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## Process a Promotion

(All employee types – with or without a pay change or additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Position Number/Job Code
- Effective Date - Start date
- Salary (if applicable)
- Additional Pay details (if applicable)
- Recruitment Type (if competitive Faculty/Academic Professional)

For Staff, a promotion is a change in current job resulting from a movement into a higher category that represents a major change in role and responsibility and includes an increase in pay. For all other employees, a promotion is a change in current job resulting from a movement into a higher category within the same salary administration plan.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active “A” employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Promotion** on the Splash Page.
4. Click the checkbox next to **Pay Rate Change** (if applicable, automatic for Staff).
5. Click the checkbox next to **Additional Pay** (if applicable).
6. Click the **Create PTR** button.

*You will be taken to the Main Page.*

7. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
8. Enter the **Position** number—for Staff this must not change from the Current data; for all others this may change or you may keep the same and use job code to promote.
9. Enter the Start Date in the **Effective Date** field.
10. Enter the **Salary/Hourly Rate** and then tab out (if pay rate change selected).
11. Enter the new **Job Code** for the promotion (if applicable, required for Staff).
12. Update the **Position Working Title** (if applicable).
13. Review the job attributes and change the **Std Hrs/Wk**, the **Reg/Temp** status, and/or the **Full/Part** status (if applicable).
14. Select the **Recruitment Type** (if Reason is competitive for Faculty/Academic Professional).
15. Enter a **PTR Business Note** (if applicable).

16. Click on the **PTR Pay Data** tab, if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay steps for details).
17. When finished, click the **Save & Send for Approval** button to submit the PTR.

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## Process a Reassignment

(All employee types – with or without a pay change/additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Position Number/Job Code
- Effective Date - Start date
- Salary/Hourly Rate (if applicable)
- Additional Pay details (if applicable)
- Recruitment Type (if competitive Faculty/Academic Professional)

For Staff, a reassignment is a change in job with a lower MRP and/or category for re-careering or organizational purposes. For all other employees, a reassignment is a change in job with a lower category within the same salary administration plan. Reassignments may have a review of salary, which may result in a change in pay.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Reassignment** on the Splash Page.
4. Click the checkbox next to **Pay Rate Change** (if applicable).
5. Click the checkbox next to **Additional Pay** (if applicable).
6. Click the **Create PTR** button.

*You will be taken to the Main Page.*

7. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
8. Enter the **Position** number— for Staff this must not change from the Current data; for all others this may change or you may keep the same and use job code to reassign.
9. Enter the Start Date in the **Effective Date** field.
10. Enter the **Salary/Hourly Rate** and then tab out (if pay rate change selected).
11. Enter the new **Job Code** for the reassignment (if applicable).
12. Update the **Position Working Title** (if applicable).
13. Review the job attributes and change the **Std Hrs/Wk**, the **Reg/Temp** status, and/or the **Full/Part** status (if applicable).
14. Select the **Recruitment Type** (if Reason is competitive for Faculty/Academic Professional).
15. Enter a **PTR Business Note** (if applicable).



16. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay and/or Overpayment steps for details).
17. When finished, click the **Save & Send for Approval** button to submit the PTR.

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## Process a Transfer

(All employee types – with or without an additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Position Number/Job Code
- Effective Date - Start date
- Salary/Hourly Rate (if applicable, unlikely)
- Additional Pay details (if applicable)
- Recruitment Type (if competitive for Faculty/Academic Professional)

A transfer results when an employee moves to a different department, unit, or college while maintaining the same job title, MRP, and category. Since the overall scope of the position has not changed, these transactions are generally not processed with a change in pay.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Transfer** on the Splash Page.
4. Click the checkbox next to **Additional Pay** (if applicable).
5. Click the **Create PTR** button.

*You will be taken to the Main Page.*

6. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
7. Enter the **Position** number— for Staff this must not change from the Current data; for all others this may change or you may keep the same and use job code to transfer.
8. Enter the Start Date in the **Effective Date** field.
9. Enter the **Salary/Hourly Rate** and then tab out (if pay rate change selected).
10. Enter the new **Job Code** for the transfer (if applicable).
11. Update the **Position Working Title** (if applicable).
12. Review the job attributes and change the **Std Hrs/Wk**, the **Reg/Temp** status, and/or the **Full/Part** status (if applicable).
13. Select the **Recruitment Type** (if Reason is competitive for Faculty/Academic Professional).
14. Enter a **PTR Business Note** (if applicable).
15. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay and/or Overpayment steps for details).

16. When finished, click the **Save & Send for Approval** button to submit the PTR.

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## Process a Pay Rate Change

(All employee types – with or without an additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Effective Date - Start date
- Salary/Hourly Rate

A pay rate change is used to increase or decrease employee compensation based on circumstances that warrant a change.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active “A” employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Pay Rate Change** on the Splash Page.
4. Click the checkbox next to **Additional Pay** (if applicable).
5. Click the **Create PTR** button.

*You will be taken to the Main Page.*

6. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
7. Enter the Start Date in the **Effective Date** field.
8. Enter the **Salary/Hourly Rate** and then tab out.
9. Change the **Position Working Title** (if applicable).
10. Enter a **PTR Business Note** (if applicable).
11. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay steps and/or the Overpayment steps for details).
12. When finished, click the **Save & Send for Approval** button to submit the PTR.

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## Place on Short Work Break

(Faculty, Academic Professionals, Graduate, Post Doc – with or without additional pay cancel)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Effective Date - Start date

When academic employees are originally renewed or hired they are given a specified end date. This process is used when you must place an employee on short work break prior to their current end date.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Place on Short Work Break** on the Splash Page.
4. Click the checkbox next to **Additional Pay Cancellation** (if applicable).
5. Click the **Create PTR** button.

*You will be taken to the Main Page.*

6. Select the transaction **Reason** by typing the code or clicking on the lookup icon.

*Due to benefits implications, if your short work break is for a benefit eligible employee and is during the middle of the academic year, you should contact the Benefits Team to place this employee on a hold.*

7. Enter the date the work break will begin in the **Effective Date** field.
8. Enter a **PTR Business Note** (if applicable).
9. Click on the **PTR Pay Data** tab if the Additional Pay Cancellation checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay Cancellation and/or Overpayment steps for details).
10. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

## Return from Short Work Break

(Faculty, Academic Professionals, Graduate, Post Doc – with or without additional pay cancel)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Position Number
- Effective Date - Start date
- End Date
- Salary
- Additional Pay details (if applicable)

This transaction is used when you would like to renew an employee that previously reached their end date and is currently on short work break.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the work break “W” employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Return from Short Work Break** on the Splash Page.
4. Click the checkbox next to **Additional Pay** (if applicable).
5. Click the **Create PTR** button.

*You will be taken to the Main Page.*

6. Enter the **Position** number— this may change or you may keep the same and use job code to return.
7. Enter the date of the return in the **Effective Date** field.
8. Enter the end date of the appointment in the **End Date** field.
9. Enter the **Salary** and then tab out.
10. Enter the new **Job Code** for the return (if applicable).
11. Update the **Position Working Title** (if applicable).
12. Review the job attributes and change the **Std Hrs/Wk**, **Reg/Temp** status, and/or **Full/Part** status (if applicable).
13. Enter a **PTR Business Note** (if applicable).
14. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected or if the effective date entered was for a prior payroll (view the Table of Contents and refer to the Additional Pay steps for details).
15. When finished, click the **Save & Send for Approval** button to submit the PTR.

## Process a Termination

(All employee types – with or without additional pay cancel and/or vacation/comp time payout)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Effective Date - Start date

A termination is used when the employee/employer relationship ends for one or multiple jobs.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A", "L", "P", or "W" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Termination** on the Splash Page. Take notice if the **Additional Pay Cancellation** and/or the **CPO/VPO/CTP Check** buttons are automatically checked.
4. Click the **Create PTR** button.

*You will be taken to the Main Page.*

5. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
6. Enter the termination **Effective Date**. This should be the last day worked plus one day.
7. Enter a **PTR Business Note** (if applicable).
8. Click on the **PTR Pay Data** tab if this employee has a vacation or compensatory time balance and the payout calculation needs to be reviewed. Also, if the record has an active additional pay, you will need to review the cancellation. Likewise, if the effective date entered was for a prior payroll, you may need to update the overpayment data (view the Table of Contents and refer to the CPO/VPO/CTP steps, the Additional Pay Cancellation steps, and/or the Overpayment steps for details).
9. When finished, click the **Save & Send for Approval** button to submit the PTR.

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## Process a Retirement

(Faculty, Academic Professionals, Staff – with or without additional pay cancel and/or vacation payout)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Effective Date - Start date

A retirement occurs when an employee has decided to conclude their working or professional career at Arizona State University.

Before performing this action you should first verify the employee is eligible to retire from ASU by checking the employee criteria (as well as the retirement checklist) at <https://cfo.asu.edu/hr-preretirement>.

You should have also received notice from the employee that he/she intends to retire and have come to an agreement with him/her on the retirement date.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A", "L", "P", or "W" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Retirement** on the Splash Page. Take notice if the **Additional Pay Cancellation** and/or the **CPO/VPO/CTP Check** buttons are automatically checked.
4. Click the **Create PTR** button.

*You will be taken to the Main Page.*

5. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
6. Enter the retirement **Effective Date**. This should be the first calendar day the employee is no longer employed by ASU.
7. Enter a **PTR Business Note** (if applicable).
8. Click on the **PTR Pay Data** tab if this employee has a vacation or compensation time balance and the payout calculation needs to be reviewed. Also, if the record has an active additional pay, you will need to review the cancellation. Likewise, if the effective date entered was for a prior payroll, you may need to update the overpayment data (click on the Table of Contents and refer to the CPO/VPO/CTP steps, the Additional Pay Cancellation steps, and/or the Overpayment steps for details).
9. When finished, click the **Save & Send for Approval** button to submit the PTR.



## Process a Job Attributes Change (Std Hrs)

(All employee types – with or without an additional pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Transaction Reason
- Position Number
- Effective Date - Start date
- Job attributes details

This transaction may be used to adjust the standard hours of a position and/or the work status between full-time and part-time and/or the employment type such as long-term temp, short-term tem, regular, or seasonal.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Std Hrs/FT PT/Reg Temp** on the Splash Page.
4. Click the checkbox next to **Additional Pay** (if applicable).
5. Click the **Create PTR** button.

*You will be taken to the Main Page.*

6. Select the transaction **Reason** by typing the code or clicking on the lookup icon.
7. Enter the start date of the transaction in the **Effective Date** field.
8. Review the position details and change the FTE in the **Std Hrs/Wk** field. If you lower the standard hours you may receive an option to payout vacation. Click **OK** to payout or **Cancel** to leave alone.
9. Change the employment type in the **Reg/Temp** field (if applicable).
10. Change the work status in the **Full/Part** field to match the standard hours (if applicable).
11. Enter a **PTR Business Note** (if applicable).
12. Click on the **PTR Pay Data** tab if the Additional Pay checkbox was selected to enter details. Also, if you received the option to payout vacation and clicked on OK, you will need to review the calculation. Likewise, if the effective date entered was for a prior payroll, you may need to review the overpayment/retro section (click on the Table of Contents and refer to the Additional Pay Cancellation steps, the CPO/VPO/CTP steps, and/or the Overpayment steps for details).
13. When finished, click the **Save & Send for Approval** button to submit the PTR.

## Process an Additional Pay

(All employee types – with or without retro pay)

Data Elements Required in order to process the Transaction

- Employee ID
- Earnings Code
- Start Date - Effective Date
- Number of Pay Periods
- Goal Amount
- Alternate Position Number (if applicable)

An additional pay is used to provide a salary commensurate to additional responsibilities and short-term functions assigned to an employee, which are either outside the employee's regular job classification or performed for a department other than the employee's assigned department.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Additional Pay** on the Splash Page.
4. Click the **Create PTR** button.

*You will be taken to the Main Page.*

5. Review any current Additional Pay information
6. Enter an **Earnings Code** by typing the code or clicking on the lookup icon.
7. Enter the effective date of the transaction in the **Start Date** field.
8. Enter the **Number of Pay Periods** the additional pay will last.
9. Enter a **Goal Amount** for the total additional pay.
10. Click the checkbox next to **Separate Check** (if applicable).
11. Click the checkbox next to **Pay on Different Position** (if applicable).
12. Enter the **Position Number** that will fund this additional pay (if Pay on Different Position selected).
13. Review the **Retro Based Payment** section calculation (if start date entered is for a prior payroll).
14. In the Retro section, click the **Override** button to make a correction and/or click the **Manual Check** option (if applicable)
15. Enter a **PTR Pay Note** (if applicable).
16. When finished, click the **Save & Send for Approval** button to submit the PTR.

## Process an Additional Pay Cancellation

(All employee types)

Data Elements Required in order to process the Transaction

- End Date – Effective Date

An additional pay cancellation is used to stop additional payments before either the end date or the goal amount has been reached.

1. Sign into PeopleSoft via **MyASU** (my.asu.edu). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Additional Pay Cancellation** on the Splash Page.
4. Click the **Create PTR** button.

*You will be taken to the Main Page. The Additional Pay section displays all current additional payments.*

5. Click the **Cancel** button of the additional pay(s) you wish to cancel.
6. Enter an appropriate **End Date**. This must be a pay period end date.
7. Enter the **Overpayment** data if the end date entered is for a prior payroll (view the Table of Contents and refer to the Overpayment steps for details).
8. Enter a **PTR Pay Note** (if applicable).
9. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>Personnel Transaction Request

## Process a Comp Time/Vacation Payout

(Employees who have an accrual balance; only available on Splash page for Hourly Staff with compensatory time)

Data Elements Required in order to process the Transaction

- Reason for Payout
- Vacation/Comp time balance

The CPO/VPO/CTP Check option should be manually selected on the Splash Page when departments would like to pay out a portion of the employee's comp time balance. If this option is automatically selected for a vacation pay out, the following steps still apply (beginning at step 5).

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **CPO/VPO/CTP Check** on the Splash Page. (Can only be manually selected for employees with Comp time balance—automatically selected for termination/retirement when applicable.)
4. Click the **Create PTR** button.

*You will be taken to the Main Page. If you selected termination/retirement and the record also needs a payout, you will be taken to the PTR Job Data tab first. Otherwise, you will be taken to the PTR Pay Data tab.*

5. Select why this payout is occurring from the **Reason for Payout** drop-down menu. If you are voluntarily paying out Comp time the reason should be **Other**. You will receive a warning message with helpful information. Click **OK**.

*This section on the PTR Pay Data tab may populate for a number of other reasons. These include: termination, retirement, decrease in FTE, and employee classification change. Select the reason that is most appropriate.*

6. Review the totals. Click on the **Override Payouts** checkbox to correct any discrepancies.
7. Click on the **Off Cycle** checkbox to process the payout with the next off-cycle period (if applicable).
8. Enter **PTR Pay Notes** (if applicable).
9. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

## Process a Leave Accrual Adjustment

(All benefits eligible employees)

Data Elements Required in order to process the Transaction

- Earnings Code
- Current Leave Hours
- Estimated Date range

Leave accrual adjustments are needed when an employee's accrual balance is incorrect.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Leave Accrual Adjustment** on the Splash Page.
4. Click the **Create PTR** button.

*You will be taken to the Main Page.*

5. Select the **Earnings Code** to be adjusted typing the code or clicking on the lookup icon.
6. Enter the **Current Leave Hours**. This information is located at: Main Menu>Benefits>Manager Leave Accruals>Review Accrual Balances.
7. Enter the **Leave Balance after Adjustment**, which is the amount you expect to see after the adjustment is made.
8. Enter the estimated date range in which the over or under accrual took place in the **Est Start Date of Accrual** and **Est End Date of Accrual** fields.
9. Add a line to adjust the accrual of another earnings code by clicking the "+" button. Repeat steps 5-8.
10. It is recommended you enter **PTR Pay Notes** to assist Payroll/Benefits with the adjustment.
11. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>Personnel Transaction Request

## Report an Overpayment

(All employee types)

Data Elements Required in order to process the Transaction

- Earnings Code
- Overpayment Reason
- Date Range
- Who discovered overpayment
- Overpayment Amount, Hours, and Explanation

Overpayments occur when an employee is paid more than the contracted amount, or past the employment end date, or when the time and labor adjustments are posted incorrectly.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A", "L", "P", or "W" employee record you would like to take action on. If the employee was overpaid on a record that is now inactive, a paper PAR must be submitted.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Report Overpayment** on the Splash Page.
4. Click the **Create PTR** button.

*You will be taken to the Main Page.*

5. Select the **Earnings Code** that was overpaid by typing the code or clicking on the lookup icon.
6. Select the **Reason** this earnings code was overpaid from the drop-down list.
7. Enter the overpayment date range in the **Start Date** and **End Date** fields.
8. Select who discovered the overpayment from the **Overpayment Discovered** drop-down menu.
9. Click the **Spoken to employee** checkbox if the employee has been contacted.
10. Enter the **Est Overpayment Amt** as well as the **Overpayment Hours**, if any.
11. Enter a detailed but concise **Explanation** for the overpayment.
12. Enter **PTR Pay Notes** (you may continue your explanation in this field if you run out of room).
13. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

## Process a Manual Check Request

(Hourly Staff, Hourly Students)

Data Elements Required in order to process the Transaction

- Earnings Code
- Earnings Begin Date
- Earnings End Date
- Total Hours (per week)

A manual check request is necessary when an employee's time is reported late and the department would like to pay the owed amount without waiting for the next pay day.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](http://my.asu.edu)). Click the **Manager** link, and then click the **PTR** link to access the PTR. \*
2. Using the Search Page, find the person that you are taking action on by typing the affiliate ID into the **Empl ID** field and clicking on the **Search** button.

*If the employee has multiple records, the search results will be displayed on the search page. You will need to select the emplid of the active "A" employee record you would like to take action on.*

*If the employee has only one job and it is active, you will be taken directly to the Splash Page.*

3. Click the checkbox next to **Request Manual Check** on the Splash Page. (Time should have already been approved in Time and Labor prior to entering this transaction.)
4. Click the **Create PTR** button.

*You will be taken to the Main Page.*

5. Select the **Earnings Code** of the late payment by typing the code or clicking on the lookup icon.
6. Enter the **Earnings Begin Date**, which should be the Monday beginning the week reported.
7. Enter the **Earnings End Date**, which should be the Sunday ending the week reported.
8. Enter the **Total Hours** for the week of the time reported.
9. Since this information should be divided by earnings code and week, click the "+" button to add another row. **Repeat steps 5-8** for the second week of the pay period. If another earnings code, such as vacation needs to be reported add another line for that as well.
10. Enter **PTR Pay Notes** to assist Payroll.
11. When finished, click the **Save & Send for Approval** button to submit the PTR.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>Personnel Transaction Request


## Approve a PTR through your Work List

(Approver's Work List)


You should receive an email indicating that you have a transaction that needs your approval. You can use the link from within the email to navigate to the work list. If you are unable to navigate via the link from the email, sign into People Soft and navigate to the Work List.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR Worklist** link to access the PTR Work List. \*
2. Locate the transaction that you are trying to approve/return on your work list.

There are many filtering mechanisms at the top of the page that you can use to narrow down your Work List view, so that you only view the items you would like to see.

3. Use the  **View PTR** icon to view what has been submitted for your approval. It is important that you review this information for errors.
4. Click on the **Go to PTR Worklist** button at the bottom of the Main Page to return to your Work List.
5. Click on the **Status** link to view the current status of the individual pieces of the transaction.
6. Click on the **Return** button to return to your Work List.
7. Click on the **Workflow Step** link to view the process monitor along with comments of other people who have approved the transaction.

If you are the first approver (account signer) there will be no comments to view.

8. Click on the **Return** button to return to your Work List.
9. If the transaction is satisfactory, click on the  **Approve** icon.
10. You will be prompted to enter optional comments on your approval. Please type the comments in and then click on the **OK** button.

You will receive a message that indicates the approval has been processed for the specific transaction you have selected.

11. Repeat above steps and approve another employee or sign out of PeopleSoft.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>PTR Worklist




## Return a PTR through your Work List

(Approver's Work List)


You should receive an email indicating that you have a transaction that needs your approval. You can use the link from within the email to navigate to the work list. If you are unable to navigate via the link from the email, sign into PeopleSoft and navigate to the Work List.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR Worklist** link to access the PTR Work List. \*
2. Locate the transaction that you are trying to approve/return on your work list.

There are many filtering mechanisms at the top of the page that you can use to narrow down your Work List view, so that you only view the items you would like to see.

3. Use the  **View PTR** icon to view what has been submitted for your approval. It is important that you review this information for errors.
4. Click on the **Go to PTR Worklist** button at the bottom of the Main Page to return to your Work List.
5. Click on the **Status** link to view the current status of the individual pieces of the transaction.
6. Click on the **Return** button to return to your Work List.
7. Click on the **Workflow Step** link to view the process monitor along with comments of other people who have approved the transaction.

If you are the first approver (account signer) there will be no comments to view.

8. Click on the **Return** button to return to your Work List.
9. If there is a problem with the transaction, click on the  **Return** icon.
10. You will be prompted to enter required comments on your return. These comments should reflect the reason why you are returning as well as instructions for the originator to take action. Please type the comments in and then click on the **OK** button.

You will receive a message that indicates the return has been processed for the specific transaction you have selected.

11. Repeat above steps and return another employee or sign out of PeopleSoft.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>PTR Worklist

## Review a Returned PTR through your Work List


(Originator's Work List)

All transactions that you have submitted or that you have in draft status will appear on your Work List. They will remain on the work list until all approvers have approved the transaction and the archive process has removed them from the list.

You should receive an email with a link to your work list once one of your approvers returns the PTR to you. You may use the link to navigate to the work list or sign directly into PeopleSoft.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR Worklist** link to access the PTR Work List. \*
2. Locate the transaction that was returned on your work list.

There are many filtering mechanisms at the top of the page that you can use to narrow down your Work List view, so that you only view the items you would like to see.

3. Click on the **Workflow Step** link to view the process monitor along with comments of other people who have returned the transaction. (You can also view the Return comments from the email you received.)
4. Click on the **Return** button to return to your Work List.
5. Click on the  **View PTR** icon.

At this point in time, the returned PTR is essentially cancelled. You now have the decision to edit the information and resubmit or allow the archive process to remove the PTR from the system. If you are choosing to edit the PTR proceed to step 6.

6. Click on the **Edit PTR** button at the bottom of the PTR page.

You will receive a message that indicates that you are creating a new PTR from the old PTR. This is necessary in order for the system to generate workflow for the edited PTR. The original PTR will be automatically archived.

7. Click the **OK** button to continue.
8. Make corrections to the PTR.
9. Resubmit the transaction by clicking the **Save and Send for Approval** button.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>PTR Worklist

## Cancel a PTR through your Work List

(Originator's Work List)

All transactions that you have submitted or that you have in draft status will appear on your Work List. They will remain on the work list until all approvers have approved the transaction and the archive process has removed them from the list.

1. Sign into PeopleSoft via **MyASU** ([my.asu.edu](https://my.asu.edu)). Click the **Manager** link, and then click the **PTR Worklist** link to access the PTR Work List. \*
2. Locate the transaction that you are trying to cancel on your work list.


There are many filtering mechanisms at the top of the page that you can use to narrow down your Work List view, so that you only view the items you would like to see.

3. Click on the **Status** link to view the current status of the individual pieces of the transaction.

There is only one overall status in which the transaction can be cancelled: In-Process.

4. Click on the **Return** button to return to your Work List.
5. Click on the **Workflow Step** link to view the process monitor along with comments of other people who have approved the transaction.

If no one has approved the transaction, there will be no comments to view.

6. Click on the **Return** button to return to your Work List.
7. Click on the  **Cancel** icon.
8. You will be prompted to confirm that your intent is to cancel the PTR. Click on the **OK** button if you intend to proceed.

You will receive a message that indicates the cancel has been processed for the specific transaction you have selected. All people who have approved the transaction previously will be notified that the transaction has been cancelled via email.

9. Repeat above steps and return another employee or sign out of PeopleSoft.

\* URL for PeopleSoft is <https://hr.oasis.asu.edu>

Navigation: ASU Customization>ASU HCM Custom> ASU HR> Personnel Transaction Request>PTR Worklist

## Track PTR Status through your Work List

(Originator's Work List)

1. Sign into PeopleSoft via [MyASU](http://my.asu.edu) (my.asu.edu). Click the **Manager** link, and then click the **PTR Worklist** link to access the PTR Work List. \*
2. Locate the transaction for which you would like to track the status on your work list.

*There are many filtering mechanisms at the top of the page that you can use to narrow down your Work List view, so that you only view the items you would like to see.*

3. Click on the **Workflow Step** link to view the process monitor along with comments of other people who have approved/returned the transaction. Each time an approver approves/returns a transaction the PTR will "day and time stamp" that approval/return.
4. Look for the approval level that is pending (if any).

Below is a status chart of the most common statuses you will see with the PTR.

Status	What it means to you
<b>Initial Status</b>	
<b>Draft (D)</b>	A PTR was started by you, but not yet submitted for approval
<b>Status while in workflow</b>	
<b>In-Process (I)</b>	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.
<b>Status once in process</b>	
<b>Returned (R)</b>	The PTR was returned by one of the approvers because the PTR needs editing.
<b>Canceled (X)</b>	The PTR was canceled by the originator and is waiting for the archive process to run to archive the information.
<b>Approved (A)</b>	The PTR has gone through all workflows and is approved.
<b>Status once fully approved</b>	
<b>Work in Process (W)</b>	Used when partial transactions are processed and when the PTR Updater starts to process the PTR.
<b>Batch (B)</b>	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.
<b>CI in Process (U)</b>	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'
<b>Final status once approved and CI processing starts</b>	
<b>CI Error (E)</b>	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.
<b>Manual (M)</b>	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.
<b>Processed (P)</b>	The PTR has successfully uploaded to PeopleSoft and the transaction will be archived when the archive process runs.