WASHINGTON STATE UNIVERSITY

HEPPS USER MANUAL

(Higher Education Payroll / Personnel System)

Financial Management Track

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Payroll Services
September 1997

HRS Employee Development
How the HEPPS System Works

**Course Objectives**

Upon completion of this course each participant will be able to:

- Explain the design concepts of the HEPPS System
- Explain how to navigate through the numerous screens.
How the HEPPS System Works

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Introduction

HEPPS stands for *Higher Education Payroll / Personnel System*.

The *HEPPS Inquiry System* provides on-line inquiry to employment / budgeting data included in EMPLOYEE, APPOINTMENT, POSITION, ASSIGNMENT and ACCOUNT data entities. Inquiry is also provided for job classification, name search, I-9 information and other types of information.

Inquiry screens are arranged as “conversations”. A conversation is a set of screens arranged in a logical sequence. There are two basic conversations:

- One is structured to provide information related to an *employee*, which includes appointments and related positions and assignments.

- The other provides information related to a *position*, which includes assignments and related appointments and employees.

The *HEPPS Inquiry System* is designed to provide simple access for novice users and productivity enhancement features for expert users. Many people authorized to access information from the *HEPPS Inquiry System* will be first-time or occasional users. All that is needed to get useful information from the *Inquiry System* is a rudimentary understanding of the two basic inquiry conversation models and a data key (either an employee’s social security number or a position number).

A person who regularly uses the *Inquiry System* will soon develop a quick way to access the desired information. A simple *command language* is provided to allow immediate display of the requested information. The command language allows the user to request a conversation, provide the required data key, and identify the screen to be displayed, all in a single command. The command language provides the expert user a simple means to change screens within and between conversations. The user may display information for a series of employees or positions without having to exit to a menu or selection screen.
How to Get Access to HEPPS

A first-time user to any Administrative Information System (AIS) program must complete an authorization form to secure an ID to access AIS. (See Section 80.37.4 of the BPPM for specific instructions.)

Next, to secure access to HEPPS, an Access Request form must be completed. (See Section 80.33 in the BPPM for specific instructions.)

To gain access to DEPTPAY for the on-line input of positive pay hours worked and the review of payroll expenses, the user will need to do the following:

1. Submit an AIS User ID form if first-time user.
2. Submit a Secure Access form requesting access to HEPPS
3. Have an electronic mail address that is present in the electronic phonebook
4. Contact Payroll Services for training.

Although most of the data stored in the HEPPS System is “public” information and not subject to confidentiality standards, it is inappropriate to release any HEPPS information for non-University business. Individuals or organizations requesting employment information should go through the Public Records Officer.
Inquiry System Concepts

The HEPPS Inquiry System is designed to follow the data entity relationships established in the design of the HEPPS data base. Employees are appointed to positions; positions are assigned accounts.

Appointments define the relationship between employees and positions. Assignments define the relationship between positions and accounts.

\[
\text{emp} \rightarrow \text{apt} \leftarrow \text{psn} \rightarrow \text{asgn} \leftarrow \text{account}
\]

Figure 1 -- HEPPS Data Entity Model

The HEPPS Inquiry System is a collection of conversations connected by an inquiry menu. A conversation is a logical arrangement of a set of screens accessible in a fixed sequence or individually. Each screen in a conversation displays information from a HEPPS data entity (e.g., EMPLOYEE, APPOINTMENT, POSITION, ASSIGNMENT) or provides a means of identifying an employee or position for inquiry.

Six screens are used to build the basic conversations. These screens are identified in the system by the following names:

- **SELECT**: Select screen for the conversation (this is where the employee or position is identified for inquiry)
- **EMP**: Employee information screen
- **APTLS**: Appointment select screen
- **APT**: Appointment information screen
- **PSN**: Position information screen
- **ASG**: Assignment information screen

There are two basic conversation models. Figure 2 shows the model for accessing information related to an employee. Conversations using this model require an employee SSN for access.

\[
\text{employee select} \quad \text{-----} \quad \text{emp} \quad \text{-----} \quad \text{aptsl} \quad \text{-----} \quad \text{apt} \quad \text{-----} \quad \text{psn} \quad \text{-----} \quad \text{asg} \quad \text{-----} \quad \text{account}
\]

Figure 2 -- Model for Conversation Accessed by Employee SSN
Figure 3 shows the model for accessing information related to a position. Conversations using this model require a position number for access.

<table>
<thead>
<tr>
<th>position select</th>
<th>-----</th>
<th>psn</th>
<th>-----</th>
<th>aptsl</th>
<th>----</th>
<th>apt</th>
<th>----</th>
<th>emp</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 3 -- Model for Conversation Accessed by Position Number

Each conversation in the core Inquiry System uses one of the two basic conversation models.

Auxiliary conversations provide inquiry for job classification, name search, I-9 information and account information.

Quick access to an inquiry screen is provided by menu selection on the HEPPS Inquiry Screen or a simple command language.
## What Updates HEPPS?

<table>
<thead>
<tr>
<th>Sources of Data</th>
<th>Position Control</th>
<th>HRS Records</th>
<th>CSHEO</th>
<th>Payroll</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Action Form</td>
<td>I</td>
<td>A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Temporary Employment Action</td>
<td>I</td>
<td>A / I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Action</td>
<td>I</td>
<td>A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Assignment Action</td>
<td>I</td>
<td>A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Transfer</td>
<td>I / A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyclic Leave Letters</td>
<td>I</td>
<td>I</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>FMLA Application</td>
<td>I</td>
<td>I</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>Time Reports (LWOP)</td>
<td>I</td>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Periodic Increment Date Letters</td>
<td>I / A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Probationary to Permanent Ltrs</td>
<td>I</td>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Batch System</td>
<td>I</td>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Salary Changes</td>
<td>I</td>
<td></td>
<td></td>
<td>A</td>
</tr>
</tbody>
</table>

Key:  
I = Input  
A = Audited

Sources of data are input by the respective unit and copies are routed to other administrative offices for review and audit. HEPPS (for the most part) is a batch system. This means that input completed during the day is not updated (or applied to the HEPPS System) until that night. For example, changes input by HRS Records on Tuesday cannot be audited by Payroll until Wednesday.

The HEPPS System is updated each night until the pay cycle cut-off date is reached. This usually occurs three (3) working days before payroll is calculated. There is no HEPPS update on the night payroll is calculated. There will be an update the next night. So, generally speaking, there are no updates to the HEPPS System for four (4) working days around the time payroll is being calculated.
Using the HEPPS Inquiry System

HEPPS Inquiry -- Selecting a Conversation

Select a conversation by typing the letter identifier for the desired conversation on the Command Line ===> and press <ENTER> or key the conversation number on the Command Line ===> and press <ENTER>.

Getting Around in a Conversation

Once a conversation has been invoked, you may move to the next screen by pressing <ENTER>. You may move back to the previous screen by pressing the clear key.

You may return to HEPPS Inquiry from anywhere in a conversation by pressing <PF12>.

QP and LP conversations have a branch to select either appointment information or assignment information from the POSITION information screen.

♦ Type ASG and press <ENTER> to view assignment information OR
♦ Type APT and press <ENTER> to view appointment information

Display Screen Features

HEPPS Inquiry screens have features to provide information to aid in the use of the system.

The upper left corner of each screen has two information fields. The top field is the screen identifier. Directly below the screen identifier is a “where am I” indicator displaying the two-character conversation ID and the screen ID for the screen currently displayed.

Centered at the top of the screen is the screen title.

The upper right-hand corner has current date and time. This will serve as a time stamp for those using a screen print facility.

The bottom two lines of the screen display the PF Key definitions for the screen currently displayed.

PF Key Definition

Programmed Function (PF) keys have been defined to ease use of the Inquiry System. The following PF keys are standard throughout the Inquiry System.

PF2 Return to the SELECT screen for the current conversation
**PF4**  Display additional PF keys

**PF6**  Display the picklist variables

**PF10**  Scroll forward (only on screens with scrolling)

**PF11**  Scroll back (only on screens with scrolling)

**PF12**  Return to the Main Menu

The PF key definitions displayed on the bottom two lines of each screen identify the command to be executed or the screen to be displayed when the PF key is pressed.

**Moving the Cursor**

The cursor must occasionally be moved to the Command Line ===> or some other input field on a screen. The most effective means of moving the cursor is to use the **forward tab** (→| ) and **backward tab** ( |← ) keys. These keys move the cursor from one input field to the next.

**"All" vs "Today"**

These three display screens can be set to display "all" values or "today’s" values:

- POSITION / ASSIGNMENT
- EMPLOYEE / APPOINTMENT SELECT
- POSITION / APPOINTMENT SELECT

To display previous values for an individual, key the word "all" on the command line and press the Enter key. To restore the screen to the employee’s current values, key "today" on the command line and press the Enter key.
Entering a Command

A command may be entered on the Command Line ===> of any screen. An invalid command or data key causes a message to be displayed. The command may be altered and re-entered.

If the position or employee selected for display has multiple appointments, an APPOINTMENT SELECT screen will be displayed. An appointment must be selected to allow display of a screen further into the conversation.

Commands on the HEPPS Inquiry Screen

♦ Conversation ID
  The select screen for the conversation is displayed

♦ Conversation ID with data key
  The first inquiry screen of the conversation is displayed

♦ Conversation ID with data key and screen ID
  The selected inquiry screen of the conversation is displayed

Commands on Select Screens

♦ Conversation ID
  The select screen of the new conversation is displayed

♦ Conversation ID with data key
  The first inquiry screen in the new conversation is displayed

♦ Conversation ID with data key and screen ID
  The selected inquiry screen of the new conversation displays the selected data

♦ Screen ID
  The selected inquiry screen of the conversation is displayed

Commands on Inquiry Screens

♦ Conversation ID
  Used for changing conversations (results will vary depending on data keys accessed in the current conversation

♦ Conversation ID with data key
  The first inquiry screen of the new conversation is displayed

♦ Conversation ID with data key and screen ID
  The selected inquiry screen of the new conversation displays the selected data

♦ Screen ID
  The selected inquiry screen of the current conversation is displayed
HEPPS Inquiry Command Language

Introduction

Why a command language? The HEPPS Inquiry System is designed to be used by both novice and expert users. The novice or occasional user can successfully use the system with minimum instruction. The command language is a productivity enhancement feature, allowing expert users to select the desired information with a minimum of key strokes. All that is required is a basic understanding of the structure of each inquiry conversation and knowledge of the basic command.

Overview

The novice can make a selection from a menu and traverse an inquiry conversation using nothing more than the <ENTER> key to see the next screen or clear to see the previous screen. Certain Program Function (PF) keys are defined throughout the system:

PF2  Return to the “select screen” at the beginning of a conversation
PF6  Picklist
PF12 Return to the HEPPS Inquiry Screen

A person who uses the Inquiry System regularly will quickly learn which screens have which information within the inquiry conversations. The command language allows the expert user to identify a conversation, an employee or position, and a screen to display. The desired information is displayed immediately without display of intermediate screens. The user may then press <ENTER> to display the next screen. Another screen, employee or position may be defined on the Command Line ===> for display.

Command Format

All commands are based on a general format. A command has three parts:

♦ A 2 to 6 character conversation ID
♦ A data key (e.g., position number, SSN), and
♦ A screen ID

The command

QP 123456 ASG

means “query position 123456 assignments”. Assignment information for the position will be displayed if this is a valid position ID. A command may consist of one or more of the three parts.

Conversation ID’s
<table>
<thead>
<tr>
<th>Description</th>
<th>Requirements</th>
<th>Length</th>
<th>On Command Line Type:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query Employee</td>
<td>Social Security Number</td>
<td>9</td>
<td>QE NNNNNNNNNN OR QEMP NNNNNNNNNN</td>
</tr>
<tr>
<td>Query Position</td>
<td>Position ID</td>
<td>5 - 6</td>
<td>QP NNNNN OR QPSN NNNNNN OR QE NNNNNNNNNN PSN OR QEMP NNNNNNNNNN PSN</td>
</tr>
<tr>
<td>List Positions</td>
<td>User defines selection criteria</td>
<td></td>
<td>LP OR LPSN</td>
</tr>
<tr>
<td>Name Search</td>
<td>Name</td>
<td></td>
<td>NS Last Name,First Name (no spaces)</td>
</tr>
<tr>
<td>Query Job Class Table</td>
<td>Job Class ID</td>
<td>4</td>
<td>QJC NNNNN</td>
</tr>
<tr>
<td>Query Account</td>
<td>Account Number</td>
<td>8</td>
<td>QACT NNNNNNNNN (the first 4 digits = Budget, the last 4 digits = Project)</td>
</tr>
<tr>
<td>Query Appointment</td>
<td>Appointment ID</td>
<td>6</td>
<td>QAPT NNNNNN OR QE NNNNNNNNNN APT OR QEMP NNNNNNNNNN APT</td>
</tr>
<tr>
<td>Query Appointment Selection</td>
<td>Social Security Number</td>
<td>9</td>
<td>QE NNNNNNNNNN APTSL OR QEMP NNNNNNNNNN APTSL</td>
</tr>
<tr>
<td>Query Assignment</td>
<td>Social Security Number</td>
<td>9</td>
<td>ASG NNNNNNNNNN OR QP NNNNN ASG</td>
</tr>
<tr>
<td>Query Appointments to Positions</td>
<td>Position ID</td>
<td>5 - 6</td>
<td>QP NNNNN APTSL</td>
</tr>
<tr>
<td>Query I-9 Information</td>
<td>Social Security Number</td>
<td>9</td>
<td>QE NNNNNNNNNN I9</td>
</tr>
<tr>
<td>Accrual Information</td>
<td>Position ID</td>
<td>5 - 6</td>
<td>ACRL OR QACRL NNNNN OR QP NNNNN ACRL</td>
</tr>
<tr>
<td>Allocation Information</td>
<td>Position ID</td>
<td>5 - 6</td>
<td>ALCN OR QALCN NNNNN OR QP NNNNN ALCN</td>
</tr>
<tr>
<td>Base Information</td>
<td>Position ID</td>
<td>5 - 6</td>
<td>BASE OR QBASE NNNNN OR QP NNNNN BASE</td>
</tr>
<tr>
<td>Description</td>
<td>Requirements</td>
<td>Length</td>
<td>On Command Line Type:</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------------------------</td>
<td>--------</td>
<td>-----------------------</td>
</tr>
</tbody>
</table>
| Query SCAN Distribution Tables   | User defines selection criteria     |        | QRYS
can            |
| Query PEAR Distribution Tables   | User defines selection criteria     |        | QRYPE
car            |
| Query Data Dictionary            | User defines selection criteria     |        | QDATA                 |
| Query Payroll Expense            | Social Security Number              | 9      | QPREXP NNNNNNNNN      |
| Query Temporary Employment       | Social Security Number              | 9      | QTEMP                 |
|                                  | WSU ID Number                       | 9      |                       |
SIGN-ON AND SIGN-OFF INSTRUCTIONS

To Sign-on

From the Administrative Information System Customer Identification Screen, key in your department’s Procedure Number, User ID, Password and HEPPS for the Application ID. Press <ENTER>.

The HEPPS Information System Screen will be displayed. Press <ENTER> to continue to the HEPPS Main Menu Screen.

Key the conversation number or conversation ID “INQUIRY” on the Command Line ===> and press <ENTER>.

The HEPPS Inquiry Screen will be displayed. Key the conversation number or conversation ID on the Command Line ===> and press <ENTER> to view a specific conversation.

To Sign-off

Press PF12 (one or more times) from almost any screen to return to the Customer Identification Screen.

Hints

From the Customer Identification Screen, press PF4 to set the default procedure number and default application ID (such as HEPPS) and press PF12. This eliminates keying the procedure number and application ID anytime you log on.

PF1 displays all AIS applications you have access to such as: OARS, HEPPS, PAPR, WSUORG, SCBAIMS.

PF5 to change your password for all AIS applications.
## System Components

The basic components of the *HEPPS Inquiry System* are:

<table>
<thead>
<tr>
<th>Components</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEPPS Inquiry Select Screen</td>
<td>Lists the available conversations. A conversation is selected by typing the 2 to 6 letter identifier on the Command Line ===&gt; or by keying the conversation ID.</td>
</tr>
<tr>
<td>QE - Query Employee</td>
<td>The Query Employee conversation provides information about a specific employee and related appointments, positions and assignments.</td>
</tr>
<tr>
<td>QP - Query Position</td>
<td>The Query Position conversation provides information about a specific position and related assignments, appointments and employees.</td>
</tr>
<tr>
<td>LP - List Positions</td>
<td>The List Positions conversation provides a list of positions based on selection criteria provided by the user. The user may then select a position and have access to the same information as provided by the QP conversation.</td>
</tr>
<tr>
<td>NS - Name Search (UNAF)</td>
<td>The Name Search conversation provides information using a name or Social Security Number as a key. An entry may be selected for detailed display if the person selected is an employee.</td>
</tr>
<tr>
<td>QAC - Query Account (FACTS)</td>
<td>The Account conversation provides information about the selected account.</td>
</tr>
<tr>
<td>QJC - Query Job Class</td>
<td>The Job Class conversation provides information about the selected job class. Access to the job class conversation is from the Command Line ===&gt; of any display screen.</td>
</tr>
</tbody>
</table>
HEPPS INQUIRY TUTORIAL BY CONVERSATION

Using HEPPS Inquiry Conversation Tutorial

The following sections are intended as a tutorial to introduce the user to the HEPPS Inquiry conversations. These exercises will introduce you to many of the features of the system, including the command language. Use your own social security number and position number for familiarization with the system.

NOTE: When no input is required on a screen, pressing the <ENTER> key (with no input on the Command Line ===>) causes the next screen in a conversation to be displayed. If you are at the last screen of a conversation, pressing <ENTER> (with no input on the Command Line ===>) will cause no change. Pressing the clear key causes the previous screen to be displayed.

Tutorial for the QUERY EMPLOYEE Conversation

The QUERY EMPLOYEE Conversation -- QE or QEMP

1 Start Conversation and Identify Employee for Inquiry

♦ From the HEPPS INQUIRY, key the conversation number or key QE or QEMP on the Command Line ===> and press <ENTER>.

♦ When the EMPLOYEE SELECT screen is displayed, key in a social security number and press <ENTER>.

♦ Employee information will be displayed on the EMPLOYEE screen.

2 Display the Next Screen

♦ To display the next screen, press <ENTER>.

♦ The EMPLOYEE/APPOINTMENT SELECT screen will be displayed, listing current appointments.

3 Select Appointment

♦ Type the number from the ‘Sel Num’ column on the Command Line ===> for the appointment you want to view and press <ENTER>. 

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4 Display **APPOINTMENT** Screen
   ♦ The appointment information will be displayed on the **APPOINTMENT** screen.

5 Display **POSITION** Screen
   ♦ To display the next screen, press <ENTER>.
   ♦ The **POSITION** screen will display the position information.

6 Display **ASSIGNMENT** Screen
   ♦ To display the next screen, press <ENTER>.
   ♦ Assignment information will be displayed on the **POSITION/ASSIGNMENT** screen.

7 Display **ACCOUNT** Screen
   ♦ Type the number from the ‘SEL Num’ column on the Command Line ===> and press <ENTER>.
   ♦ The account information for that budget/project will be displayed.

8 Return to the **EMPLOYEE SELECT** Screen
   ♦ Press PF12
   ♦ Press PF2
   ♦ The **EMPLOYEE SELECT** screen will be displayed.

9 Return to **HEPPS INQUIRY** Screen
   ♦ Press PF12 (or move the cursor to the Command Line ===>, type END and press <ENTER>.)
   ♦ The **HEPPS INQUIRY** screen will be displayed.
10 Direct Screen Access Using Command

♦ Type QE NNN NN NNNN PSN (“NNN NN NNNN” represents a 9-digit social security number) on the Command Line ===> and press <ENTER>.

♦ The POSITION screen will be displayed. However, if the employee selected has multiple appointments, the EMPLOYEE/APPOINTMENT SELECT screen may appear for you to identify the appointment/position information to be displayed. If there are more than seven appointments, scroll forward (PF10) to see more appointment information. To scroll backward, press PF11. Type the number from the ‘Sel Num’ column on the Command Line ===> for the appointment you want to view and press <ENTER>. The APPOINTMENT screen will appear.

♦ Find a position number on the screen. Write it down for use in the QUERY POSITION tutorial.

11 Return to HEPPS INQUIRY Screen

♦ Press PF12

12 To Exit

♦ Press PF12 twice.
Tutorial for the QUERY POSITION Conversation

The QUERY POSITION Conversation -- QP or QPSN

1 Start Conversation and Identify Position for Inquiry

- From the HEPPS INQUIRY, key the conversation number or key QP or QPSN on the Command Line ===> and press <ENTER>.
- When the POSITION SELECT screen is displayed, key in a position number and press <ENTER>.
- Position information will be displayed on the POSITION screen.

2 Select APPOINTMENT INFORMATION Option

- You must select either APPOINTMENT (APT) or ASSIGNMENT (ASG) information to see the next screen from the POSITION screen in the QUERY POSITION conversation. Type APT on the Command Line ===> and press <ENTER>.
- The POSITION/APPOINTMENT SELECT screen will be displayed, listing current appointments if multiple appointments exist. Type the number from the ‘Sel Num’ column on the Command Line ===> and press <ENTER>.
- The appointment information will be displayed on the APPOINTMENT screen.

3 Display POSITION Screen

- To display the next screen, press <ENTER>.
- The POSITION screen will display the position information.

4 Return to POSITION SELECT Screen

- Press PF2
- The POSITION SELECT screen will appear. Key in a position number and press <ENTER>. 
5 Display *POSITION* Screen

♦ Press <ENTER>.

♦ The *POSITION* screen will be displayed.

6 Select the *ASSIGNMENT INFORMATION* Option

♦ Type **ASG** on the Command Line ===> and press <ENTER>

♦ Assignment information will be displayed on the *POSITION/ASSIGNMENT* screen.

7 Display *ACCOUNT* Screen

♦ Type a number from the ‘SEL Num’ column on the Command Line ===> and press <ENTER>.

♦ The account information for that budget/project will be displayed.

8 Return to the *POSITION SELECT* Screen

♦ Press PF12

♦ The *POSITION SELECT* screen will appear.

9 Return to *HEPPS INQUIRY* Screen

♦ Press PF12 (or move the cursor to the Command Line ===>, type END and press <ENTER>).

♦ The *HEPPS INQUIRY* screen will be displayed.

10 Direct Screen Access Using Command

♦ Type QP NNNNNN ASG (where “NNNNNN” is a position number) on the Command Line ===> and press <ENTER>.

The *POSITION/ASSIGNMENT* screen will be displayed.
11 Return to HEPPS INQUIRY Screen

♦ Press PF12

12 To Exit

♦ Press PF12 twice.
Tutorial for the LIST POSITIONS Conversation

The LIST POSITIONS Conversation -- LP or LPSN

1 **Start Conversation and Identify Position for Inquiry**

♦ From the **HEPPS INQUIRY**, key the conversation number or key **LP** or **LPSN** on the Command Line ===> and press <ENTER>.

♦ When the **LIST POSITIONS** screen is displayed, key selection criteria in one or more of the fields and press <ENTER>.

♦ A list of positions meeting the selection criteria will be displayed. If no positions are displayed, change the selection criteria.

2 **Select a position for Inquiry**

♦ Using the **forward tab (➔| )** key, move the cursor to one of the lines in the position list.

♦ Type an **X** and press <ENTER> to view the **POSITION** screen

3 **Select APPOINTMENT INFORMATION Option**

♦ You must select either **APPOINTMENT** (APT) or **ASSIGNMENT** (ASG) information to see the next screen from the **POSITION** screen in the **QUERY POSITION** conversation. Type **APT** on the Command Line ===> and press <ENTER>.

♦ If the position has multiple appointments, the **POSITION/APPOINTMENT SELECT** screen will be displayed, listing current appointments. Type the number from the ‘Sel Num’ column on the Command Line ===> for the appointment you want to view and press <ENTER>.

♦ The appointment information will be displayed on the **APPOINTMENT** screen.
4 Return to *LIST POSITIONS* Screen
   ♦ Press PF2
   ♦ The *LIST POSITIONS* screen will appear with selection criteria and the list of positions.

5 Return to *HEPPS INQUIRY* Screen
   ♦ Press PF12

6 To Exit
   ♦ Press PF12 twice.
Tutorial for the NAME SEARCH Conversation

name list ----- emp ----- aptsl ---- apt ---- psn ---- asg

The NAME SEARCH Conversation -- NS

1  Start Conversation and Identify Employee for Inquiry

♦ From the HEPPS INQUIRY, key NS on the Command Line ===> and press <ENTER>.

♦ When the NAME SEARCH screen is displayed, key in a name or partial name and press <ENTER>. MATCHING is the default search option. A search type option is not required if you want matching.

♦ The NAME SEARCH - MATCHING screen with the list of selected names will be displayed.

♦ Press PF4 for additional help.

♦ Press PF8 to display DEMOGRAPHIC, RECORD TYPE or ADDRESS information.

2  Select an Employee for Inquiry

♦ Scroll forward (PF10) or backward (PF11) through the list of names.

♦ Press PF8 to display RECORD TYPE, DEMOGRAPHIC or ADDRESS information.

♦ When you find an entry with a record type of EMPLY, move the cursor next to the entry, type an X and press <ENTER>.

♦ If the person is a current employee, the EMPLOYEE screen will be displayed. If a “NO EMPLOYEE FOUND...” message is displayed, try another entry.

3  Display the Next Screen

♦ To display the next screen, press <ENTER>.

♦ The EMPLOYEE/APPOINTMENT SELECT screen will be displayed, listing current appointments.
4 Select Appointment

♦ Type the number from the ‘Sel Num’ column on the Command Line ===> for the appointment you want to view and press <ENTER>.

5 Display APPOINTMENT Screen

♦ The appointment information will be displayed on the APPOINTMENT screen.

6 Display POSITION Screen

♦ To display the next screen, press <ENTER>.
♦ The POSITION screen will display the position information.

7 Return to the SELECT Screen

♦ Press PF2
♦ The NAME SEARCH - MATCHING screen will be displayed.
♦ You may select another entry for inquiry. Move the cursor to one of the selection fields (use the forward tab (→| ) key).
♦ Type an X and press <ENTER>.
♦ The EMPLOYEE information for the person you selected will be displayed.

8 Return to HEPPS INQUIRY Screen

♦ Press PF12

9 To Exit

♦ Press PF12 twice.
Tutorial for the JOB CLASSIFICATION Conversation

The **JOB CLASSIFICATION** Conversation provides information describing the designated job classification.

1. From the **HEPPS INQUIRY** screen, key the conversation number or **QJC NNNN** (where “NNNN” is the job class ID) on the Command Line ===> and press <ENTER>.

2. The **JOB CLASSIFICATION** display screen will be displayed.

3. The **JOB CLASSIFICATION** Conversation may also be accessed from within another conversation.

4. If position information is currently being displayed, type **QJC** on the Command Line ===> and press <ENTER>.

5. Otherwise, type **QJC NNNN** (where “NNNN” is the job class ID) on the Command Line ===> and press <ENTER>. Note PF5 for details.

6. To exit, press PF12 three times.

Tutorial for the QUERY ACCOUNT Conversation

The **QUERY ACCOUNT** Conversation provides information describing the designated account.

1. From the **HEPPS INQUIRY**, key the conversation number or **QACT NNNN NNNN** (where “NNNN NNNN” is the budget / project) on the Command Line ===> and press <ENTER>. Currently, budget/project is the account ID.

2. The **ACCOUNT** screen will be displayed.

3. The **ACCOUNT** Conversation may also be accessed from within another conversation.

4. If **POSITION/ASSIGNMENT** information is currently being displayed, type the number from the ‘Sel Num’ column on the Command Line ===> for the assignment account detail you want to view and press <ENTER>.

5. Otherwise, type **QACT NNNN NNNN** (where “NNNN NNNN” is the budget / project) on the Command Line ===> and press <ENTER>.

6. To exit, press PF12 three times.
Tutorial for the QUERY PAYROLL EXPENSE Conversation

Start Conversation and Identify the Employee for Inquiry

♦ From the HEPPS INQUIRY, key the conversation number or key QPREXP on the Command Line ===> and press <ENTER>.

♦ Complete the selection criteria as appropriate, then press <ENTER>.

♦ Press PF1 or press <ENTER> to display the payroll expenses for the period requested in the criteria.

♦ Key the selection number on the Command Line ===> to view the contribution details for the specific payroll expense.

♦ HINT: See PF4 for additional function keys.

♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY I-9 INFORMATION Conversation

Start Conversation and Identify the Employee for Inquiry

♦ From the HEPPS INQUIRY, key the conversation number or key QE or QEMP on the Command Line ===> and press <ENTER>.

♦ When the EMPLOYEE SELECT screen is displayed, key in a social security number and press <ENTER>.

♦ Employee information will be displayed on the EMPLOYEE screen.

♦ Key I9 on the Command Line ===> and press <ENTER> to view the I-9 Data.

♦ Press PF12 three times to exit HEPPS.
Tutorial for the QUERY APPOINTMENT Conversation

Start Conversation and Identify the Appointment(s) for Inquiry

♦ From the *HEPPS INQUIRY*, key the conversation number or key **QAPT** on the Command Line ===> and press <ENTER>.

♦ When the *APPOINTMENT SELECT* screen is displayed, key in the appointment number and press <ENTER>.

♦ Appointment details for this appointment will be displayed.

♦ Press PF4 for additional functions within this conversation.

♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY ALLOCATION ADJUSTMENT DETAIL Conversation

Start Conversation and Identify the Position Allocation Adjustment Detail

♦ From the *HEPPS INQUIRY*, key the conversation number or key **QALCN** on the Command Line ===> and press <ENTER>.

♦ When the *POSITION SELECT* screen is displayed, key in a position number and press <ENTER>.

♦ Allocation adjustment details for this position will be displayed.

♦ Press PF4 for additional functions within this conversation.

♦ Press PF12 three times to exit HEPPS.
Tutorial for the QUERY BASE ADJUSTMENT DETAIL Conversation

Start Conversation and Identify the Position Base Adjustment Detail

♦ From the HEPPS INQUIRY, key the conversation number or key QBASE on the Command Line ===> and press <ENTER>.

♦ When the POSITION SELECT screen is displayed, key in a position number and press <ENTER>.

♦ Base adjustment details for this position will be displayed.

♦ Press PF4 for additional functions within this conversation.

♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY ACCRUAL Conversation

Start Conversation and Identify the Position Accrual Detail

♦ From the HEPPS INQUIRY, key the conversation number or key QACRL on the Command Line ===> and press <ENTER>.

♦ When the POSITION SELECT screen is displayed, key in a position number and press <ENTER>.

♦ Accrual details for this position will be displayed.

♦ Press PF4 for additional functions within this conversation.

♦ Press PF12 three times to exit HEPPS.
Tutorial for the QUERY DATA DICTIONARY DETAIL Conversation

Start Conversation and Identify the Data Entity for the Inquiry

♦ From the **HEPPS INQUIRY**, key the conversation number or key **QDATA** on the Command Line ===> and press <ENTER>.

♦ From the **SELECT DATA ENTITY** screen, key an X on the selection line to the left of the entity name and press <ENTER>.

♦ Key an X on the line to the left of the data attribute(s) you wish to review and press <ENTER>.

♦ PF keys will be displayed to show additional functions. Try PF6 ‘Picklist’ to see the valid values for this attribute or try PF7 ‘Text’ to view the description about the attributes.

♦ Press PF12 three times to exit HEPPS.
Tutorial for the QUERY SCAN DISTRIBUTION TABLE Conversation

To start this Conversation:

1. From the HEPPS INQUIRY, key the conversation number or key QRYSCAN on the Command Line ===> and press <ENTER>.

2. There are three (3) ways to view account information in the SCAN file:
   - To view the entire file, press PF1.
   - To view accounts by department zip code, press PF3, key in zip code and press <ENTER>.
   - To view specific account details, key in account (budget and project) and press <ENTER>.

3. Off-campus units have unique zip codes assigned by Payroll Services and the zip code in the SCAN file may be different in the PEAR file. Press PF1 to view the entire file to determine the zip code assigned by Payroll.

   If the account number is not found in the file, the message ‘Record Was Not Found 2’ will appear in the top left-hand corner of the screen. All new account numbers must be found in BALANCES and must be active.

4. The SCAN attributes are:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Column</th>
<th>Length Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>1-4</td>
<td>N4</td>
</tr>
<tr>
<td>Project</td>
<td>6-9</td>
<td>N4</td>
</tr>
<tr>
<td>Dept Zip</td>
<td>12-15</td>
<td>A4</td>
</tr>
<tr>
<td>Dept Name</td>
<td>17-31</td>
<td>A15</td>
</tr>
<tr>
<td>AIS User ID Primary</td>
<td>32-38</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 1</td>
<td>39-46</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 2</td>
<td>47-54</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 3</td>
<td>55-62</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 4</td>
<td>63-70</td>
<td>A8</td>
</tr>
</tbody>
</table>
5 Budget / Project Acceptable Values

B = Budget P = Project X = Wildcard

**Values Example:**

BBBPPPPP One Account
BBBBPPPX One Budget, as many as 10 Projects
BBBBPPXX One Budget, as many as 100 Projects
BBBBPXXX One Budget, as many as 1,000 Projects
BBBBXXXX One Budget, All Projects
BBBBXXXXX As many as 10 Budgets and All Projects
BBXXXXXX As many as 100 Budgets and All Projects

Example:

BBBPPPPP HEPPS User ID’s
1234XXXX SMITH, JONES
12340010 MILLER, ANDERSON

Smith and Jones will have access to ALL accounts for budget 1234 EXCEPT 1234-0010, which ONLY MILLER and ANDERSON will have access to. Generally speaking, access at any level in the wildcard hierarchy is across the board, except that any access specified at lower levels in the same hierarchy structure is excluded. Department personnel may revise their account configurations to eliminate redundant table entries.

6 Changes in the SCAN Distribution File may be made for various reasons, such as:

♦ Department name change
♦ Department zip code change
♦ Primary/Secondary AIS User ID changes
♦ To consolidate account entries
♦ To establish table entries for new account(s)

7 Notify Payroll Services via e-mail to alice@wsu.edu (or a memorandum addressed to the Payroll Officer) and include the following data:

♦ Name and phone number of department contact person.
♦ Department zip code
♦ Which file to update -- SCAN, PEAR or both
♦ Account(s) to be updated
♦ Description of requested change
8 Change requests affecting SCANS should be received in Payroll Services two (2) days before SCANS are scheduled to be distributed.

9 Press PF12 twice to exit HEPPS.
Tutorial for the QUERY PEAR BUDGET/ZIP TABLE Conversation

To start this Conversation:

1 From the HEPPS INQUIRY, key the conversation number or key QRYPEAR on the Command Line ===> and press <ENTER>.

2 There are three (3) ways to view account information in the PEAR file:

   ♦ To view the entire file, press PF1.

   ♦ To view accounts by department zip code, press PF3, key in zip code and press <ENTER>.

   ♦ To view specific account details, key in account (budget and project) and press <ENTER>.

3 Off-campus units have unique zip codes assigned by Payroll Services and the zip code in the PEAR file may be different in the SCAN file. Press PF1 to view the entire file to determine the zip code assigned by Payroll.

   If the account number is not found in the file, the message ‘Record Was Not Found 2’ will appear in the top left-hand corner of the screen. All new account numbers must be found in BALANCES and must be active.

4 The PEAR attributes are:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Column</th>
<th>Length Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>1-4</td>
<td>N4</td>
</tr>
<tr>
<td>Project</td>
<td>6-9</td>
<td>N4</td>
</tr>
<tr>
<td>Dept Zip</td>
<td>12-15</td>
<td>A5</td>
</tr>
<tr>
<td>Dept Name</td>
<td>19-43</td>
<td>A25</td>
</tr>
<tr>
<td>Dept Contact Phone</td>
<td>51-58</td>
<td>A8</td>
</tr>
<tr>
<td>Work County Code</td>
<td>68-69</td>
<td>N2</td>
</tr>
<tr>
<td>Print 3rd Copy</td>
<td>80</td>
<td>A1</td>
</tr>
<tr>
<td>AIS User ID Primary User</td>
<td>81-88</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 1</td>
<td>89-96</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 2</td>
<td>97-104</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 3</td>
<td>105-112</td>
<td>A8</td>
</tr>
<tr>
<td>AIS User ID Secondary 4</td>
<td>113-120</td>
<td>A8</td>
</tr>
</tbody>
</table>
5 Budget / Project Acceptable Values

B = Budget             P = Project             X = Wildcard

Values Example:

BBBBPPPP One Account
BBBBPPPX One Budget, as many as 10 Projects
BBBBPPXX One Budget, as many as 100 Projects
BBBBPXXX One Budget, as many as 1,000 Projects
BBBBXXXX One Budget, All Projects
BBXXXXXX As many as 10 Budgets and All Projects
BBXXXXXX As many as 100 Budgets and All Projects

Example:

BBBBPPPP HEPPS User ID’s

1234XXXX SMITH, JONES
12340010 MILLER, ANDERSON

Smith and Jones will have access to ALL accounts for budget 1234 EXCEPT 1234-0010, which ONLY MILLER and ANDERSON will have access to. Generally speaking, access at any level in the wildcard hierarchy is across the board, except that any access specified at lower levels in the same hierarchy structure is excluded. Department personnel may revise their account configurations to eliminate redundant table entries.

6 Changes in the PEAR Distribution Files may be made for various reasons, such as:

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7 Notify Payroll Services via e-mail to alice@wsu.edu (or a memorandum addressed to the Payroll Officer) and include the following data:

♦ Name and phone number of department contact person.
♦ Department zip code
♦ Which file to update -- SCAN, PEAR or both
♦ Account(s) to be updated
♦ Description of requested change
8 Change requests affecting SCANS should be received in Payroll Services two (2) days before PEARs are scheduled to be distributed.

9 Press PF12 twice to exit HEPPS.
Tutorial for the QUERY TEMPORARY EMPLOYMENT Conversation

♦ From the HEPPS INQUIRY, key the conversation number or key QTEMP on the Command Line ===> and press <ENTER>.

♦ Key the Temporary Job ID from the Appointment screen and press <ENTER>. Contact CSHEO with any questions about this data.

♦ Key the department number instead of the Temporary Job ID and press <ENTER>. The active Temporary Job ID’s will be displayed.

♦ Press PF3 to go to the Financial Aid System to view work study limits.

♦ Key in the student’s ID number and session, then press <ENTER> to view work study awards. Press PF5 to decode data.
Basic HEPPS Conversations

QE or QEMP: Query Employee Conversation

HEPPS Inquiry
Type QE or QEMP on the Command Line ===> and press <ENTER>.
A command in one of the following forms may be used:

- QE or QEMP NNN NN NNNN XXX
- QE or QEMP NNNNNNNNN XXX
- QE or QEMP NNN NN NNNN
- QE or QEMP NNNNNNNNN

Where ‘NNN NNN NNN’ is a SSN.
Where ‘XXX’ is a screen identifier (up to eight characters).

Employee Select
Key in the SSN of the employee you are interested in and press <ENTER>.
(This screen is bypassed if a SSN is provided in a command.)

Employee Display
Display of employee information.

Appointment Select
List of appointments for the selected employee.
(May be bypassed if only one appointment to the position.)

Appointment Display
Display of the selected appointment information.

Position Display
Display of the position for the appointment.

Assignment Display
Display of Assignments for the position.

Account Display
Display of Account data from FACTS.
QP or QPSN: Query Position Conversation

Type QP or QPSN on the Command Line ===> and press <ENTER>.
A command in one of the following forms may be used:

QP or QPSN NNNNNN XXX
QP or QPSN NNNNN

Where ‘NNN NNN NNN’ is a position number.
Where ‘XXX’ is a screen identifier (up to eight characters).

Key in the POSITION ID of the position you are interested in and press <ENTER>.

Display of position information.

List of appointments for the selected position.
(Type APT and press <ENTER> to see this display.)
May be bypassed if only one appointment to the position.

Display of the selected appointment information.

Display of Assignments for the position.
(Type ASG and press <ENTER> to see this display.)

Display of Account information from FACTS.
LP or LPSN: List Positions Conversation

HEPPS Inquiry

Type LP or LPSN on the Command Line ===> and press <ENTER>.

Selection Criteria

Key in the criteria you are interested in and press <ENTER>.

Position Select

Select the POSITION you are interested in and press <ENTER>.

---

Position Display

Display of position information.

Appointment Select

List of appointments for the selected position.
(Type APT and press <ENTER> to see this display.)
May be bypassed if only one appointment to the position.

Appointment Display

Display of the selected appointment information.

Assignment Display

Display of Assignments for the position.
(Type ASG and press <ENTER> to see this display.)
**NS: Name Search Conversation**

**HEPPS Inquiry**

Type **NS** on the Command Line ===> and press <ENTER>.

**Name Search Criteria**

Key in the name in *Last Name, First Name* format without spaces and search type. Press <ENTER>.

**Name List**

Display of name, address, SSN, WSU number. Select one for detailed display if desired and press <ENTER>.

**Employee Display**

Display of employee information.

**Appointment Select**

List of appointments for the selected employee.

**Appointment Display**

Display of the selected appointment information.

**Position Display**

Display of the position for the appointment.

**Assignment Display**

Display of assignments for the position.
QACT: Query Account Conversation

HEPPS Inquiry

Type QACT on the Command Line ===> and press <ENTER>. The QACT Conversation may be accessed from any display screen in the Inquiry System using the following command:

QACT NNNNMM

Where ‘NNNN’ is the budget. Where ‘MMMM’ is the project.

Account Display

Display of account information for the selected account.

---

QJC: Query Job Class Conversation

HEPPS Inquiry

Type QJC on the Command Line ===> and press <ENTER>. The QJC Conversation may be accessed from any display screen in the Inquiry System using the following command:

QJC NNNN

Where ‘NNNN’ is the Job Classification ID

Job Class Display

Display of Job Class information for the selected Job Classification ID.
To log into the HEPPS System:

To Logon, Please enter the following information

Procedure Number ( ) REQUIRED
User ID ( ) REQUIRED
Password ( ) REQUIRED
Application ID ( ) REQUIRED

For assistance please press PF9 or call: (509) 335-0522

PF Key ( )

Key in the following and press <ENTER>:

Procedure Number
User ID
Password
Application ID: HEPPS
This is the HEPPS Logo Screen. Press <ENTER> to continue.

A command may be entered on the Command Line.

Press PF12 to exit
HEPPS Main Menu:

Please select one of the following commands:

1  INQUIRY  Hepps Inquiry
2  WRKPLACE Employee Workplace
3  MAILSTOP WSU Mail Stops

This is the HEPPS Main Menu Screen.

To select HEPPS Inquiry, key the conversation number or conversation ID (INQUIRY) on the Command Line and press <ENTER>.

To exit, press PF12 twice.
This is the HEPPS Inquiry Screen.

To select a conversation, key the conversation number or conversation ID on the Command Line and press <ENTER>.

To exit, press PF12 three times.
Query Employee Screen:

PPIQ2210 HEPPS System 09:01:58 08/27/97
QEMP EMP Employee

SSN NNN–NN–NNNN
WSU No 90122768 Initial Hire Date 01/15/76
Name WILLOW, ROBERT Continuous Service Date 10/15/76
Home Dept 6880 COMPARATIVE AMERICAN CULTURES
Status Active
Stat Reason Active Employee WSU Prev Sv
Perf Eval Yr Emplmt Stat Date 10/00/76 St Prev Sv
Tenure Ind Y Perm/Temp Permanent Month Break Sv
Tenure Stat T Full/Part Full-Time Work County 38
Tenure Year 1979 Emplmt Type Faculty Work Location PUL
Grad/Fac Elg Y --- Personal Data ---
--- Personal Data ---
Date of Birth 11/29/26 Gender M Citizenship US
High Edu Lvl 12 Ethnicity 50 Visa Type Code
Edu Level Year 70 Handicap Code N Visa Expr Date
Military Status

Command ==> PF9 = Help
PF4 = PF Key Help PF6 = Picklist PF12 = Menu

To get to the Query Employee Screen, on a Command Line key:

QE NNNNNNNNNN OR
QEMP NNNNNNNNNN (N = Social Security Number)

Then press <ENTER>.

The Query Employee Screen displays employee information.

To view the I-9 data for this individual, key I9 on the Command Line and press <ENTER>.

To look at the Query Employee Screen for another individual, key their Social Security Number (without QE or QEMP) on the Command Line and press <ENTER>.
Query Employee I-9 Screen:

SSN NN-NNN-NNNN
WSU No 10196783
Name MCGOVERN, GEORGE
Home Dept 0000
Status Active
Stat Reason Unknown
WSU Prev Sv

Perf Eval Mon Emplmt Stat Date 07/05/96
Tenure Ind Perm/Temp Temporary
Tenure Stat Full/Part Part-Time
Tenure Year Emplmt Type Hourly Staff

--- I9 Information ---

I9 Form I9 Form on File Effective Date 07/05/96
Form Location Student Employment Office Retention Date
Authorization Expiration Date Visa Type Code

Command ==> PF9 =Help
PF4 = PF Key Help PF6 = Picklist PF7 = Additional Functions PF12 =Menu

To get to the Query Employee I-9 Screen, on a Command Line key:

QE NNNNNNNNNN I9 OR
QEMP NNNNNNNNNN I9 (N = Social Security Number)

Then press <ENTER>.

The Query Employee I-9 Screen displays I-9 data.

To display this screen for another individual, key their Social Security Number on the Command Line and press <ENTER>.
Query Appointment Screen:

To get to the Query Appointment Screen, on the Command Line key:

- **QE NNNNNNNNN NNNNN** OR (N = Social Security Number)
- **QEMP NNNNNNNNN NNNNN** OR (N = Social Security Number)
- **QAPT NNNNNN** (N = Appointment ID)

Press <ENTER>

```
PPIQ2410                                HEPPS System  10:16:01  08/27/97
QE APT                                Appointment
SSN  NNN-NN-NNNN                       Begin Date 08/16/97
Name WILLNAR,BETTER                   End Date 99/99/99
Jbcls 0290  PROFESSOR
Appt Dept 6880  COMPARATIVE AMERICAN CULTURES  Apt ID 435077
Position ID 42292  Effort Percent 100.0000  Active/Inactive Active
Job Class 290  Pay Rate 5555.62  Appointment Status Permanent
Range/Step 159  A Full Time Rate 5555.62  Employment Type Faculty
Brgn Unit  Appt Term 9.000  Work Schedule FNORM
Temp Emp ID  PID\Perf Month 00  Work Period N/A
Pay Affecting Yes
Pay Rate Code Monthly
Time Report Code Exception
O/T Eligible
Salary Variance No
Command ==> PF4 = PF Key Help  PF6 = Picklist  PF12 = Menu
```

```
PPIQ2310                                HEPPS System  10:17:50  08/27/97
QE APTSL                              Employee/Appointment Select
SSN  NNN-NN-NNNN
Name WILLNAR,BETTER
Appointments as of 08/06/97

Sel Posn  Titl  Begin  End  FT Rate  FTE  Pay Rate  m Py St Lv Ac TypDept
--- ------ ---- ------ ------ -------- ----- ----------- - -- -- -- -- --- -
1 0290 081693 999999                    0.00/  W N 7  N  Y C 1250
2 42292 0290 081697 999999  5555.62 1.0000 5555.62/M E  Y 1  N  Y 6880
3 42292 0290 070197 081597  5555.62 1.0000 5555.62/M E  N 1  N  Y 6880

Enter Sel number and press <Enter>  Page 1 of 1

Command ==> PF4 = PF Key Help  PF6 = Picklist  PF12 = Menu
```
If the individual has only one appointment, you will be taken directly to the appointment screen. If multiple appointments exist, you will be shown the Employee/Appointment Select. To view a specific appointment, key the ‘sel’ select number on the Command Line and press <ENTER>.

To view another individual’s appointment, key their Social Security Number on the Command Line and press <ENTER>. 
Query Employee/Appointment Select Screen:

To get to the Query Employee/Appointment Select Screen, on the Command Line key:

\[
\begin{align*}
\text{QE } & \text{ NNNNNNNNNN APTSL OR } (N = \text{Social Security Number}) \\
\text{QEMP } & \text{ NNNNNNNNNN APTSL } (N = \text{Social Security Number})
\end{align*}
\]

Press <ENTER>. This screen displays one or more appointments for this specified Social Security Number.

PPIQ2310 HEPPS System 10:38:55 08/27/97
QE APTSL Employee/Appointment Select

SSN NNN-NN-NNNN
Name VONFRANK, DELBERT J

Appointments as of 08/06/97

<table>
<thead>
<tr>
<th>Sel</th>
<th>Posn</th>
<th>Titl</th>
<th>Begin</th>
<th>End</th>
<th>FT Rate</th>
<th>FTE</th>
<th>Pay Rate</th>
<th>m Py</th>
<th>St</th>
<th>Lv</th>
<th>Ac</th>
<th>TypDept</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>38706</td>
<td>0290</td>
<td>081697</td>
<td>999999</td>
<td>7387.24</td>
<td>1.0000</td>
<td>7387.24/M</td>
<td>Y</td>
<td>1</td>
<td>N</td>
<td>Y</td>
<td>1830</td>
</tr>
<tr>
<td>2</td>
<td>38706</td>
<td>0290</td>
<td>070197</td>
<td>081597</td>
<td>7387.24</td>
<td>1.0000</td>
<td>7387.24/M</td>
<td>N</td>
<td>1</td>
<td>N</td>
<td>Y</td>
<td>B 1830</td>
</tr>
</tbody>
</table>

Enter Sel number and press <Enter>

Command ==> 

PF4 = PF Key Help      PF6 = Picklist
PF12 = Menu

To view a specific appointment, key the 'sel' select number on the Command Line and press <ENTER>.

To display this screen for another individual, key their Social Security Number on the Command Line and press <ENTER>.

To view previous appointments for this individual, key the word "all" on the Command Line and press <ENTER>. To return to the current appointments display, key the word "today" on the Command line and press <ENTER>.
Query Position Screen:

To get to the Query Position Screen, on the Command Line key:

- QE NNNNNNNNNN PSN OR (N = Social Security Number)
- QEMP NNNNNNNNNN PSN OR (N = Social Security Number)
- QPSN NNNNNN OR (N = position ID)
- QP NNNNNNN (N = position ID)

Press <ENTER>

<table>
<thead>
<tr>
<th>QE PSN</th>
<th>HEPPS System</th>
<th>10:51:28</th>
<th>08/27/97</th>
</tr>
</thead>
<tbody>
<tr>
<td>38706 VONFRANK DELBERT J</td>
<td>Area-Dept 10 1830</td>
<td>Begin Date 01/01/85</td>
<td></td>
</tr>
<tr>
<td>0290 PROFFESSOR</td>
<td>ENGL</td>
<td>End Date 99/99/99</td>
<td></td>
</tr>
<tr>
<td>Faculty</td>
<td>Cycle Begin 08/16/97</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step</td>
<td>Cycle End 05/15/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/16/97</td>
<td>Last Change Date 08/16/97</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Status: Active
- Object: 00
- Perm/Temp: Permanent
- Posn Type: N
- Service Basis: Academic
- Tuition Code: N
- Posn Term: 9.000
- Non-Staff: Work Period
- On campus
- Allocation Amount

<table>
<thead>
<tr>
<th>Allocn Pct</th>
<th>Effort Pct</th>
<th>Base Value</th>
<th>Allocation Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin</td>
<td>100.0000</td>
<td>6,833.56</td>
<td>6,833.56</td>
</tr>
<tr>
<td>Current</td>
<td>100.0000</td>
<td>6,833.56</td>
<td>61,502.04</td>
</tr>
<tr>
<td>Future</td>
<td>100.0000</td>
<td>7,387.24</td>
<td>66,485.16</td>
</tr>
<tr>
<td></td>
<td>7,387.20</td>
<td>66,485.16</td>
<td></td>
</tr>
</tbody>
</table>

Command ==>
PF4 = PF Key Help  PF6 = Picklist  PF12 = Menu

To display this screen for another individual, key their position number on the Command Line and press <ENTER>. 
Query Position/Assignment Screen:

To get to the Query Position Assignment Screen, on the Command Line key:

\[
\begin{align*}
\text{QE } & \quad \text{NNNNNNNNN PSN OR (N = Social Security Number)} \\
\text{QEMP } & \quad \text{NNNNNNNNN PSN OR (N = Social Security Number)} \\
\text{QPSN } & \quad \text{NNNNN ASG (N = position ID)}
\end{align*}
\]

Press <ENTER>

---

To display this screen for another individual, key their position number on the Command Line and press <ENTER>.

Pay particular attention to the Assignment Begin and End Dates in the type of “EXPN” (expense) Column. The dates must be active during the current pay cycle for an individual to be paid.

To view previous assignments for this individual, key the word "all" on the Command Line and press <ENTER>. To return to the current assignments display, key the word "today" on the Command line and press <ENTER>.
List Positions Screen:

To get to the List Position Screen, on the Command Line key

   LP  OR
   LPSN

Then press <ENTER>.

The List Positions Screen displays user selection criteria and a list of the positions which match the criteria.
Name Search (University Name and Address File) Screen:

To get to the Name Search Screen, on the Command Line key:

```
NS  NNNNNNNNNN OR   (N = Social Security Number)
NS  TARGET NAME
```

Then press <ENTER>.

The Name Search Screen displays name search criteria and search type selection. Matching is the default and may be left blank.

The target name may be as few as one letter or as many letters as will fit in the input field. (The more letters, the better.) If you key an abbreviated form of the last name and multiple names where selected, use the PF10 key to scroll through all names until the desired name is found.

To search for a specific name, end the target name with a comma (e.g., smith,). The target may be made more specific by including a first name (e.g., smith,betty).

The format for a name is: last name comma first name (no space)

Complete the name or SSN line, then press <ENTER>.
If you know the Social Security Number, then that value may be keyed on the SSN line instead of keying in the name.

The logical option will select the next best fit for the target name. Once a name is found, use the PF4 key for additional help or PF8 to view demographic data and record type codes.

To search for another name, key: NS  TARGET NAME  on the Command Line and press <ENTER> or press PF12 to return to the Name Search start screen and key in a target name or a social security number.
Query Job Class Table:

To get to the Job Classification Screen, on the Command Line key:

```
QJC  NNNN  (N = Job Class ID)
```

Then press <ENTER>.

---

The Job Classification Screen displays job classification information. Another job class
may be displayed by keying: NNNN (N = Title Code) on the Command Line and press
<ENTER>.
Query Position Appointment Select Screen:

To get to the Query Position Appointment Screen, on the Command Line key:

\[
\text{QP NNNNNN APTSL} \quad (N = \text{position number})
\]

Then press <ENTER>.

This screen displays one or more appointments for the specified position number.

To view a specific appointment, key the number to the left of the individual's last name on the Command Line and press <ENTER>.

To display this screen for another position, key the position number on the Command Line and press <ENTER>.

To view previous appointments for this individual, key the word "all" on the Command Line and press <ENTER>. To return to the current appointments display, key the word "today" on the Command line and press <ENTER>.
Query Account Screen:

To get to the Query Account Screen, on the Command Line key:

```
QACT bbbbpppp (b = budget    p = project)
```

Then press <ENTER>.

<table>
<thead>
<tr>
<th>Sel</th>
<th>Begin date</th>
<th>Ending date</th>
<th>Bdgt Subs Acct Num</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>02/26/1997</td>
<td>99/99/9999</td>
<td>WAMI MEDICINE</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>04/26/1994</td>
<td>02/25/1997</td>
<td>WAMI MEDICINE</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>06/23/1993</td>
<td>04/25/1994</td>
<td>WAMI MEDICINE</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>02/04/1991</td>
<td>06/22/1993</td>
<td>WAMI MEDICINE</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>07/02/1989</td>
<td>02/03/1991</td>
<td>WAMI MEDICINE</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>07/01/1985</td>
<td>07/01/1989</td>
<td>WAMI MEDICINE</td>
<td></td>
</tr>
</tbody>
</table>

The Query Account Screen gives the account attributes for the specified budget/project from the Financial Accounting System (FACTS).

To query another account in FACTS, key the budget/project on the Command Line and press <ENTER>.
Query Allocation Adjustment Detail Screen:

To get to the Query Allocation Adjustment Detail Screen, on the Command Line key:

```
ALCN OR
QALCN NNNNN  OR  (N = position number)
QP NNNNNN ALCN        (N = position number)
```

Then press <ENTER>.

PPIQ4200 HEPPS System 20:25:08 08/27/97
QACRL ACRL Accrual Detail
Position 76589 Accruals as of 07/01/97
Name HAPPY, GOLUCKY

<table>
<thead>
<tr>
<th>Pay</th>
<th>Retro</th>
<th>Alloc</th>
<th>Expense</th>
<th>Accrual</th>
<th>Accruals</th>
<th>Accruals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyc</td>
<td>ET</td>
<td>RSN</td>
<td>Period</td>
<td>Dollars</td>
<td>Dollars</td>
<td>Dollars</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>------</td>
<td>-------</td>
<td>-------</td>
<td>-------</td>
</tr>
<tr>
<td>071</td>
<td>REG</td>
<td>06</td>
<td>06</td>
<td>1491.68</td>
<td>1499.44</td>
<td>7.76-4102-5016</td>
</tr>
<tr>
<td>072</td>
<td>S/D</td>
<td>03</td>
<td>7/15/97</td>
<td>7.76</td>
<td>0.00</td>
<td>7.76-4102-5016</td>
</tr>
<tr>
<td>081</td>
<td>REG</td>
<td>33</td>
<td>7/31/97</td>
<td>0.00</td>
<td>1349.50-</td>
<td>1349.50-4102-5016</td>
</tr>
<tr>
<td>081</td>
<td>REG</td>
<td>32</td>
<td>7/31/97</td>
<td>0.00</td>
<td>1349.50-</td>
<td>1349.50-4102-5016</td>
</tr>
<tr>
<td>081</td>
<td>S/D</td>
<td>32</td>
<td>7/31/97</td>
<td>0.00</td>
<td>149.94</td>
<td>149.94-4102-5016</td>
</tr>
<tr>
<td>081</td>
<td>S/D</td>
<td>33</td>
<td>7/31/97</td>
<td>0.00</td>
<td>149.94-</td>
<td>149.94-4102-5016</td>
</tr>
</tbody>
</table>

Contact your Area Finance Officer or the WSU Budget Office representative if you have questions about allocation adjustments.

To view allocation adjustments for another position, key the position number on the Command Line and press <ENTER>. 
Query Base Adjustment Detail Screen:

To get to the Query Base Adjustment Detail Screen, on the Command Line key:

```
BASE OR
QBASE NNNNN OR   (N = position number)
QP NNNNN BASE OR   (N = position number)
```

Then press <ENTER>.

<table>
<thead>
<tr>
<th>Pay Earn</th>
<th>Cyc Type</th>
<th>Rsn</th>
<th>Date</th>
<th>Alloc</th>
<th>Amount</th>
<th>Adj Alloc</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>071</td>
<td>CHR</td>
<td>07/01/98</td>
<td>3412.44</td>
<td>3412.44</td>
<td></td>
<td>9841-0901</td>
<td>4102-5016</td>
<td></td>
</tr>
<tr>
<td>071</td>
<td>REG</td>
<td>07/01/98</td>
<td>30712.08</td>
<td>30712.08</td>
<td></td>
<td>9841-0901</td>
<td>4102-5016</td>
<td></td>
</tr>
<tr>
<td>071</td>
<td>REG 511</td>
<td>07/01/97</td>
<td>30712.08</td>
<td>1675.92</td>
<td>32388.00</td>
<td>9841-0901</td>
<td>4102-5016</td>
<td></td>
</tr>
<tr>
<td>071</td>
<td>S/D 511</td>
<td>07/01/97</td>
<td>3412.44</td>
<td>186.12</td>
<td>3598.56</td>
<td>9841-0901</td>
<td>4102-5016</td>
<td></td>
</tr>
</tbody>
</table>

Contact your Area Finance Officer or the WSU Budget Office representative if you have questions about base adjustments.

To view base adjustments for another position, key the position number on the Command Line and press <ENTER>.
Query Accrual Detail Screen:

To get to the Query Accrual Detail Screen, on the Command Line key:

ACRL
QACRL NNNNN OR (N = position number)
QP NNNNN ACRL OR (N = position number)

Then press <ENTER>.

<table>
<thead>
<tr>
<th>Pay</th>
<th>Retro</th>
<th>Alloc</th>
<th>Expense</th>
<th>Accrual</th>
<th>Accruals from</th>
<th>Accruals to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyc</td>
<td>ET</td>
<td>RSN</td>
<td>Period</td>
<td>Dollars</td>
<td>Dollars</td>
<td>Dollars</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>-----</td>
<td>-------</td>
<td>-------</td>
<td>-------------</td>
<td>-----------</td>
</tr>
<tr>
<td>071</td>
<td>REG</td>
<td>06</td>
<td>7/15/97</td>
<td>1491.68</td>
<td>1499.44</td>
<td>7.76-</td>
</tr>
<tr>
<td>072</td>
<td>S/D</td>
<td>03</td>
<td>7/15/97</td>
<td>7.76</td>
<td>0.00</td>
<td>7.76</td>
</tr>
<tr>
<td>081</td>
<td>REG</td>
<td>33</td>
<td>7/31/97</td>
<td>0.00</td>
<td>1349.50-</td>
<td>1349.50</td>
</tr>
<tr>
<td>081</td>
<td>REG</td>
<td>32</td>
<td>7/31/97</td>
<td>0.00</td>
<td>1349.50</td>
<td>1349.50-</td>
</tr>
<tr>
<td>081</td>
<td>S/D</td>
<td>32</td>
<td>7/31/97</td>
<td>0.00</td>
<td>149.94</td>
<td>149.94-</td>
</tr>
<tr>
<td>081</td>
<td>S/D</td>
<td>33</td>
<td>7/31/97</td>
<td>0.00</td>
<td>149.94-</td>
<td>149.94</td>
</tr>
</tbody>
</table>

Contact your Area Finance Officer or the WSU Budget Office representative if you have questions about accruals.

To view accrual details for another position, key the position number on the Command Line and press <ENTER>. 
Query SCAN Distribution Table:

To get to Query SCAN Distribution Table, on the Command Line key:

    QRYSCAN

Then press <ENTER>.

PPIQ5620                  Payroll EXEC System              20:41:51   08/27/97
QRYSCAN     STRT         Qry Scan Distribution Tbl

+----------------------------------------------------+
|  Bdgt Proj   Zip    Department Name   AIS User ID  |
|  ____ XXXX                                         |
|                                                    |
|                                                    |
|                                                    |
|                                                    |
|                                                    |
+----------------------------------------------------+

PF1 = Display file                    PF3 = Display zips
PF12 = Menu

Either key a specific budget/project and then press <ENTER> OR proceed to choose either PF1 or PF3.

This conversation displays the accounts and their HEPPS User ID's for access to the secured HEPPS conversation known as DEPTPAY for the reporting of hours worked or pieces completed.
Query PEAR Distribution Table:

To get to Query PEAR Distribution Table, on the Command Line key:

QRYPEAR

Then press <ENTER>.

---

Either key the specific budget/project and then press <ENTER> OR proceed to choose either PF1 or PF3.

This conversation displays the accounts and their HEPPS User ID’s for access to the secured HEPPS conversation known as DEPTPAY for the reporting of payroll expenses.
Query Data Dictionary:

To get to Query Data Dictionary, on the Command Line key:

    QDATA

Then press <ENTER>.

<table>
<thead>
<tr>
<th>Mark to select a Data Entity:</th>
<th>-----</th>
</tr>
</thead>
<tbody>
<tr>
<td>_ Accrual</td>
<td>Text  IVERSITY</td>
</tr>
<tr>
<td>_ Allocation</td>
<td>Y</td>
</tr>
<tr>
<td>_ Appointment</td>
<td>Y     P PPPPPPSSS</td>
</tr>
<tr>
<td>_ Assignment</td>
<td>Y     PP PPPPPPSSSS</td>
</tr>
<tr>
<td>_ Employee</td>
<td>Y     P PPPP PPPP SSSS SSSS</td>
</tr>
<tr>
<td>_ Encumbrance</td>
<td>Y     PPPPPP SSSS SSSS</td>
</tr>
<tr>
<td>_ Expense</td>
<td>Y     PPPPPPSSSS</td>
</tr>
<tr>
<td>_ Job Class</td>
<td>Y     PPPP SSSS SSSS</td>
</tr>
<tr>
<td>_ Pay Scale</td>
<td>Y     PPP SSSSSSSSSSSS</td>
</tr>
<tr>
<td>_ Position</td>
<td>Y     PP SSSSSSSSSSSS</td>
</tr>
</tbody>
</table>

Page 1 of 2

PF10 = Forward  PF11 = Back  PF7 = Text  PF12 = Exit

COMMAND ==> QDATA

PF12 = EXIT

Key an X on the entities which you are interested in viewing.

Most of the data on the Query Employee Screen is from the Employee entity. Most of the data on the Appointment Screen is from the Appointment entity, etc.

The Data Dictionary explains the values allowed for each element within each entity. Examples of elements are: name, address, VISA type, etc. You will be provided with a brief description (see PF7 Text) of each element. See PF6 for the allowable values for an element.
Query Payroll Expense:

To get to Query Payroll Expense, on the Command Line key:

*QPREXP NNNNNNNNNN OR (N = Social Security Number)
QPREXP NNNNN (N = position number)

Then press <ENTER>.

*When using this option, wipe out the position number or expenses will be displayed just for that position number.

Complete the “pay cycle end date” selection dates and then press <ENTER>.

Command ==> PF1 = Payroll Expense Detail
PF12 = Menu

This will summarize the records found. Press <ENTER> again to view expense details.
To view contribution details, key the ‘sel’ selection number on the Command Line and press <ENTER>. Contributions are the amounts paid by the University on this individual’s behalf.

Enter Sel num to view Contribution Detail

Command ==> PF4 = PF Key Help   PF5 = Decode   PF10 = Forw   PF12 = Menu

See PF4 and PF5 keys for additional functions.
Query Tenure:

To get to Query Tenure, on the Command Line key:

\[ \text{QTR NNNNNNNNN} \quad (N = \text{Social Security Number}) \]

Then press <ENTER>.

---

**SSN** NNN-NN-NNNN
**Name** SCOTT, BRETT
**Home Dept** 7230  CROPS AND SOILS
**Initial Hire Date** 08/07/89
**Continuous Service Date** 08/07/89
**Emplmt Status Date** 08/07/89

**Status** T
**Status Year** 1989

<table>
<thead>
<tr>
<th>Job Class</th>
<th>Dept</th>
<th>Subject</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>0290</td>
<td>7230</td>
<td>0015</td>
<td>0.2000</td>
</tr>
<tr>
<td>0390</td>
<td>7230</td>
<td>0015</td>
<td>0.3000</td>
</tr>
<tr>
<td>0591</td>
<td>7230</td>
<td>0015</td>
<td>0.5000</td>
</tr>
</tbody>
</table>

---

The Query Tenure Screen displays tenure data. To look at tenure data for another individual, key their Social Security Number on the Command Line and press <ENTER>.
Query Temp:

To get to Query Temp, on the Command Line key:

    QTEMP

Then press <ENTER>.

Please specify one of the following keys and press 'ENTER'.
Processing will continue based on the key specified.

Query TEMPORARY JOBS by:

    Temp. Job Id: ______
    Dept Id: ____

Command ==> 

    PF3 = FAMS
    PF12 = Menu

Key the temporary job ID and press <ENTER>. The temporary job ID is found on the Appointment Screen. The appointments displayed for this job ID may be more current than the job roster which is sent monthly from CSHEO. Contact CSHEO with any questions about this data.

Key in the department number instead of the temporary job ID and press <ENTER>. The active temporary job ID’s for this department will be displayed.

To go to the Financial Aid System (FAMS) to confirm work study limits, press PF3. Key in the student’s WSU ID number and session, then press <ENTER> to view work study awards.
WSU Id: 999996544 SSN: NNN-NN-NNNN Name: BROWN, RONALD FY 1998 AP

Authorized Period of Employment for Fall: 08/16/1997 through 12/31/1997
Authorized Period of Employment for Spring: 01/01/1998 through 05/15/1998

<table>
<thead>
<tr>
<th>Fund</th>
<th>Source</th>
<th>Awarded as of Fall Sem</th>
<th>Awarded as of Sprg Sem</th>
<th>Earned as of Fall Sem</th>
<th>Earned as of Sprg Sem</th>
</tr>
</thead>
<tbody>
<tr>
<td>U/351</td>
<td>STATE</td>
<td>07/06/97</td>
<td>800.00</td>
<td>800.00</td>
<td></td>
</tr>
</tbody>
</table>

Totals 800.00 800.00

Just because you can view the work study award in FAMS does not necessarily mean the same limit is present in the HEPPS System. Limits are displayed in HEPPS on the Positive Pay Time transactions as well as on the Payroll Expenditure Audit Reports within the secured HEPPS conversation called DEPTPAY.
**Academic Appointment**: An appointment for the nine-month period corresponding to the appropriate academic calendar. This is a special kind of cyclic appointment. This type of appointment is not used for classified staff or administrative professional.

**Account**: Budget-project combination which defines a specific economic activity. The account is used as the key for the Master Account Table and may be used to derive the remaining elements of the coding (e.g., fund, appropriation, program).

**Account Entity**: A primary entity which provides financial resources for a position.

**Accrual**: When there is a difference between what is allocated per pay cycle versus what is expensed, an accrual occurs. This term of accrual is somewhat misnamed and would be better understood if it were termed 'allocation adjustment'. An accrual is a flow of dollars from one account to another. An accrual occurs when there is a difference between what is planned versus what has actually happened.

**AIS**: Administrative Information Systems. Terminal control for accessing on-line systems at Washington State University.

**ALC**: Annual Leave Cashout. Earnings type used when paying terminal annual leave hours above 240 for classified staff on separation. These earnings are not subject to PERS deductions.

**Allocation**: The process by which Washington State University specifies where the state appropriated dollars are to be expended.

**ALP**: Annual Leave Payoff. Earnings type used when paying the first 240 hours of terminal annual leave for classified staff. These earnings are subject to PERS deductions.

**Annual Appointment**: An appointment for twelve months

**Appointment Entity**: A transactional entity which manages the relationship between employee and position.

**Appointment Forms**: Personnel forms which establish, change, maintain or conclude the employee/employer relationship between an employee and WSU for the performance of specific duties at an agreed-on rate of compensation and other considerations.

**Appointment Splits**: When specific appointment elements are changed, the target appointment end date is set to the day prior to the action effective date, retaining the original appointment information as history. A copy of the original appointment is created with its begin date equal to the action effective date. This allows for appointment history to be automatically created. The new appointment carries the changed information.

**Appointment Status**: An indicator of the condition of the appointment (e.g., active, inactive, temporary, probationary, etc.).

**Appropriation**: A state appropriation is legislative authorization to incur expenditures for
specific purposes and limited as to time and amount from designated resources. All other appropriations are categorizations for internal funds management. Appropriation is indicated by a two-digit numeric code appended to fund.

**Appt ID**: Appointment ID. The key used to link appointment with employee and position.

**Appt Status**: Abbreviation for appointment status. (See Appointment Status.)

**Assg ID**: Assignment ID. The key used to link assignment with position and account. A sequential numerical reference to a particular account assignment line.

**Assignment Entity**: A transactional entity which manages the relationship between position and account.

**Base Value**: The full-time salary assigned to a position, excluding stipends and differentials.

**BSH**: Base Scheduled Hours. The hours scheduled to be worked in the pay period.

**Budget**: Numeric code for a recognized function within the institution. Used by payroll to charge expenses and designate responsible unit.

**Carry Forward**: When a change is made to an appointment, the same elements in future appointments with the same keys (SSN, PSN-ID) are changed. This applies to both appointments in the APPOINTMENT storage and to appointments represented by transactions in the queue.

**Cash Advance**: The advance of approximately seventy percent of expected earnings to an employee instead of a Hand-drawn Check. The advance is processed through the Controller's Office. The dollar amount of the advance is recovered on the following check by a one-time deduction.

**Classified Staff**: All employees under the jurisdiction of the Department of Personnel as defined by RCW 28B.16.

**Coding**: The grouping of fund, appropriation, program, sub-program, budget, object and project.

**CTP**: Compensatory Time Off.

**Cutoffs**: The dates established for processing documents (e.g., receiving, batching, mailing, etc.). The dates by which certain activities must be performed.

**Cyclic Year Position**: A position scheduled to work for less than twelve full months each year (excluding academics), due to known, recurring periods in the annual cycle when the position is not needed.

**Data Element**: The smallest logical piece of information stored in a computed file. This piece of information is referenced by a data element number.

**Data Entry**: That unit of the Computing Center which enters batch data into the computer system.
**Declining Balance**: The balance owing on a deduction which is taken in installments.

**Deduction**: A gross-to-net element amount which is subtracted from gross earnings. This amount does not reduce the Federal Income Tax subject gross.

**Deductive**: That which is deducted without reducing the Federal Income Tax subject gross.

**Direct Deposit**: The electronic transfer of payments to any bank in the U.S. which is a member of an automated clearing house. (See ACH)

**Dynamic Maintenance**: A process to automatically define values for certain fields not entered through user input. Dynamic maintenance transactions are created based on selected HEPPS data and any transactions created during the maintenance process or existing in the queue. An example is EMP-EMPLOYMENT-STATUS-CD: dynamic maintenance "looks" at all appointments as of the effective date of the maintenance activity, and defines the employment status as ACTIVE if active appointments exist or SEPARATED if there are no active appointments.

**Earnings Type**: A three-character unique description used to identify the category of earnings (e.g., REG is used for regular pay).

**EDC**: Entity Data Change. A change or addition to entity data processed by the payroll office and input on an Entity Data Change Form or from a Temporary Employment Appointment Form.

**Edits**: The listing, count and error reports generated when payroll transactions are verified against the Payroll Master File and certain edit routines to validate the accuracy/logic of the input information.

**Effort %**: This is the percent of appointment that the position will support.

**EIC**: Earned Income Credit. An advance-of-filing refund of Federal income tax based on expected earned income, filing status, non-excludable income, maintenance of a household and at least one dependent child. (See specific requirements on the Earned Income Credit Advance Payment Certificate (W-5).)

**Employee Entity**: A primary entity which encompasses collected data on those individuals who perform services for the university which can be controlled by the university as employer.

**Employee Types**: Those terms which categorize an employee's type of service (e.g., classified staff, faculty, graduate assistant, etc.).

**Encumbrance**: Estimated charges obligated but not yet disbursed for salaries and employee benefits. These estimates are based on start dates, end dates, FTE’s, earnings types and benefits indicators input from Personnel Action Forms and Employee Benefits Enrollment Forms into the payroll system and translated to the accounting system. (Encumbrances can also be incurred for other university obligations.) That subset of projected payroll expenses that is fed to account.
**Entity**: A subject that we collect or maintain data about.

**Entity Data Change**: (See EDC.)

**Entity Storage**: The physical file which contains the data collected pertaining to an entity.

**ETD**: Employment To Date. Selected dollar and hour balances computed since the start of employment with WSU or since start-up of the balance, whichever is most recent.

**ETRF**: Expenditure Transfer Request Form. The form used to request that expenditures be transferred between funding sources. This should be used to request transfers when they do not reflect continuing changes in funding source nor adjustments to effort previously certified on an Effort Certification Report.

**Exempt**: Former common reference name for Administrative and Professional personnel. Includes all employees “exempt” from the provisions of the Higher Education Personnel law and Department of Personnel rules. This should not be confused with FLSA exempt.

**Exempt Status**: The status pertaining to exclusion from Federal Income Tax. Code 98 indicates a W-4-Exempt on file for exemption from FIT. Code 99 indicates no tax liability is anticipated (e.g., working outside the US or on limited retirement supplementation). Code 97 indicates a non-US citizen working out of country. Code 96 indicates exemption via a Tax Treaty.

**Exemptions**: Another term for withholding allowances from Federal income tax.

**Expense Assignment Actions**: A form which is used to change only expense assignment account coding. This coding is used for charging payroll expenses.

**Expense Transfer**: The transferring of identifiable direct charges for payroll expenses and, optionally, related employer costs from one funding source to another. (Uses transaction types E1, E2 and E3.)

**Faculty**: Teachers, researchers, public service professionals, counselors, librarians, and administrators responsible for directing and achieving the primary missions of the university, excluding employees within the administrative and professional personnel classification.

**Fed Med**: Federal Medicare.

**Federal Tax Marital Status**: The marital status shown on the W-4 Form for Federal income tax withholding purposes. This may not be the actual marital status as in the case of married but withholding at the higher single rate. Here, the actual marital status is married while the Federal tax marital status is single.

**FICA**: Federal Insurance Compensation Act. (See social security.)

**First Half**: The payroll period which begins on the first day of the month and terminates on the fifteenth of the month.

**FIT**: Federal Income Tax.

**FTE**: Full Time Equivalent. The percent of a full-time assignment (of duties) that an employee will work in an appointment to a position over a specified period of time. This value is derived from the definition of a full-time work load.

**Fund**: An accounting entity which carries limitations and restrictions on the use of the associated resources and identifies the source of monies (e.g., state, local, federal).

**GTN**: Gross-to-Net. The gross-to-net process calculates net pay by subtracting reductions and deductions from each employees' gross pay. Gross-to-net elements indicate which reductions and deductions should be taken.

**HDC**: Hand-drawn Check. A manually calculated and prepared payroll check. (Uses transaction types H1, H2 and H3.)

**HEPPS**: Higher Education Payroll/Personnel System. The acronym used to describe the WSU Human Resources Management System which consists of Payroll, Personnel, Position Control, Central Database and Data Maintenance.

**HEPPS Data**: Elements in HEPPS storages required for Human Resource management.
HEPPS Entities: Entities required to meet the business requirements of Human Resource Management. Primary entities (e.g., EMPLOYEE, POSITION, ACCOUNT) stand alone without other entities. Transactional entities (e.g., APPOINTMENT, ASSIGNMENT) link stand alone entities. Employees are appointed to positions which are assigned accounts.

HEPPS Storages: The data files necessary for storage of HEPPS entities.

HEPPTRAN: The transaction process and file for data changes and additions to the HEPPS storages which are input by the Payroll Office staff on EDC’s and/or TEA’s.

Hourly: Those employees who work on a unit basis of pay with hour as the unit.

Job Class: A category of duties and responsibilities as defined by WSU or the DOP. (Also known as title description.)

Job Group: A grouping of jobs within an EEO-6 classification that have similar job content, wage rate and promotional opportunities.

Journal Voucher (JV): A document used to create or change transactions in the accounting system.

Leave Reports: Form used to record leave activity for faculty and administrative and professional personnel.

LWOP: Leave Without Pay.
Manual Check: A manually calculated and prepared payroll check. Also known as a Hand-drawn Check (HDC).

Medical Aid: Medical expense payment provision for employees injured on the job.

Medicare: Medical expense payment provision for people sponsored by Social Security.

Non-resident: Any person in this country on a visa which is not issued as a resident alien or immigrant type.

OASI: Old Age Survivors Insurance.

Object: A two-digit code which identifies expenditure type (e.g., 00 = salary, 01 = wage, 07 = employee benefit, etc.).

OFM: Office of Financial Management (Olympia).

Operating Fee Waiver: That portion of tuition scholarships, excluding activity fees, provided to qualifying graduate assistants.

OVP: Overpayment. A transactional input document processed to recover an excessive payment. (Uses transaction codes O1, O2 and O3.)

PAF: Personnel Action Form. The form required to initiate or change appointment/payment of all salaried employment, faculty timecard employment, courtesy appointments and non-service payments. (Also see appointment forms.)

PAR: Payroll Audit Report. A list, by employee, which details their payroll computation (e.g., time, type of pay, gross pay by funds, amount of each reduction/deduction/contribution, adjustment activity, disbursement activity, balances, etc.).

Payroll Documents Calendar: The schedule specifying due dates for payroll related documents by pay cycle.


Perquisite: Additional non-salary compensation for an employee. Given a dollar value for benefits calculations (e.g., room, board).

PID: Periodic Increment Date. The date upon which a classified staff employee is scheduled to move to a higher salary step within the range for his/her current class. The PID process is the mechanism by which these increases are formatted into payroll, personnel and position control transactions for update to the appropriate files.

Piece: Those employees paid on the basis of dollars per units completed with units completed equal to the number of pieces.

Position Actions: The forms used to show on-going changes to positions. These forms are to indicate changes to positions which are intended for the duration of the position based on currently available information.
Position Control: The office involved in the process of creating and modifying positions within HEPPS. This section manages units of human and financial resources known as positions.

Position Entity: A primary entity which describes a uniquely identifiable set of duties and responsibilities and its concurrent financial resource requirements.

Position ID: Also referred to as position number.

Program: Part of a code which signifies the various operating functions within the university (e.g., instruction, administration, research). Program is the numeric portion of the full code. (See also Sub-program.)

Project: Local numeric code classification which is a subdivision of a recognized institutional function indicated by the budget.

Projected Payroll Expense: An estimate of future costs of salaries and benefits. This differs from encumbrance because we can calculate project payroll expense for all employee-appointment-position-assignment-account, yet we may only feed a subset of these projected payroll expenses to accounting. We also summarize benefit encumbrances by employee type in accounting, while they are not summarized as a Projected Payroll Expense.

RA, Research Assistant: Matriculating students, either graduate or undergraduate, whose primary responsibilities are related to research.

RA, Retroactive Adjustment: Gross pay adjustment which applies to a prior pay period. RA is the transaction type of this adjustment.

Range: A pay scale for specific job classifications.

Recovery: The process of regaining an excessive payment. A recovery is entered into the payroll system as an overpayment. (See OVP.)

Reduction: A gross-to-net element amount which is subtracted from gross earnings and also reduces Federal income tax subject gross.

Reductive: That which is deducted while also reducing Federal income tax subject gross by an amount equal to the amount of the deduction.

Replacement Check: A manually prepared check issued as a substitute for a lost or stolen check.

SA: Staff Assistant. Matriculating student, either graduate or undergraduate, whose primary responsibilities are related to public service and/or administrative assistance.

Salaries: Fixed compensation periodically paid to employees for regular work. (Object 00 expenses.)

Second Half: The payroll period which begins on the sixteenth of the month and terminates on the last day of the month.
**SH**: Staff Hour. One person's full-time effort for one hour.

**SHE**: Staff Hour Equivalent. The percent of a full-time staff hour (SH) that an employee will work in an appointment over the period of an hour.

**SM**: Staff Month. One person's effort for one month.

**SME**: Staff Month Equivalent. The percent of a full-time staff month (SM) that an employee will work in an appointment over the period of a month.

**Social Security**: An insurance plan, relating to life insurance and old age pensions, offered/required by the Federal government to specified groups of the population, on a contributory basis.

**SSN**: Social Security Number. The unique number assigned by the Social Security Administration to each individual's Social Security account. This number is necessary for employment.

**STD**: Semester to Date. Selected dollar and hour balances computed since the start of the semester and zeroed before the start of the next semester (e.g., work study earnings STD).

**Step**: A one-character code identifying the horizontal position of the employee on the pay range of their appointment.

**Sub-fund**: (See appropriation.)

**Sub-object**: A two-digit alpha code to further breakdown object into more detailed categories.

**Sub-program**: Part of the code which signifies the various operating functions within the university (e.g., instruction, administration, research). The alpha portion of the code. This portion of the code also indicates the agency for grant and contract funding sources. (See also Program.)

**Supplemental Pension Tax**: Part of the Medical Aid contribution by WSU.

**TA**: Teaching Assistant. Matriculating student, either graduate or undergraduate, whose primary responsibilities are related to teaching.

**TEA**: Temporary Employment Appointment form. The form used to establish or change the appointments for temporary, occasional employees. This form carries the transaction types/information which feeds PAYTRAN and HEPTRAN.

**Time Report Forms**: Used to report attendance, leave and overtime for classified staff.

**Title Code**: A code specifying a category of duties and responsibilities as defined by WSU or the DOP (also known as job class code).

**Visa Types**: The types of endorsements given by an authorized representative of a country to foreigners wishing entrance to the country for various purposes. The type of visa indicates the desired purpose and carries with it certain restrictions pertaining to various
activities such as employment.

**Wages:** Compensation paid to employees on an hourly or piece basis. (Object 01 expenses.)

**Withholding Allowances:** Allowable exemptions from Federal income tax for self, spouse, age, blindness, and dependents.

**W-2 Forms:** Wage and Tax Statement. The form used to report wages, tips, other compensation, withheld income and social security taxes, and advance earned income credit payments to the IRS, the Social Security Administration and the employee.

**W-4 Forms:** Employee’s Withholding Allowance Certificate. Required by Federal law to be on file with the Payroll Office before any salary or wage payments are made.

**YTD:** Year-to-Date. Selected dollar and hour balances computed since the start of the calendar year or since start-up of the balance, whichever is most recent (e.g., withholding covered gross YTD). These balances are zeroed before the start of the next calendar year.