Job and Employee Management System

Rate and Title Adjustment System Manual

Last modified/reviewed on 02/17/2023

Introduction

Manual Goal

The objective of this document is to provide instruction on how to use the web-based system to request Rate and Title Adjustments for faculty, limited appointees, academic staff, and university staff.

Manual Objectives

- Define what a Rate and Title Adjustment is
- Know how to navigate the JEMS – Rate and Title Adjustment System
- Create new Rate and Title Adjustment transaction
- Search and manage submitted Rate and Title Adjustment transactions

Audience

- HR professionals who are responsible for requesting Rate and Title Adjustments for faculty, limited appointees, academic staff, and university staff (for adjustments not involving a change in duties).

Key Terms

- The Job and Employment Management System (JEMS) – Is used as a front-end system by UW - Madison that pushes and pulls information to and from HRS.
- Rate and Title Adjustment (R/T) – Rate and Title Adjustments are requests to make a change to an employee's rate of pay or title based on position or job duty changes.
- PVL Number – The Position Vacancy Listing (PVL) is a package of recruitment information for a position.
- Human Resource System (HRS) – This acronym will be used in this manual; it refers to the PeopleSoft system where information about employees ends up, and where the payroll is run.

Notables

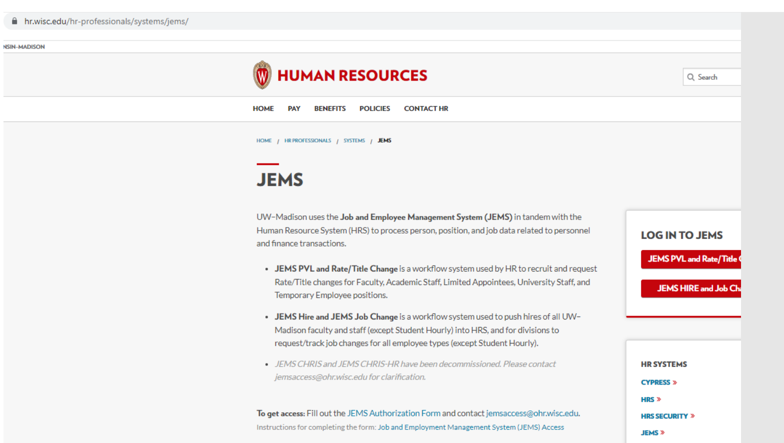
- Based on security access, only authorized buttons will be navigable (not grayed out) on the Main Menu.

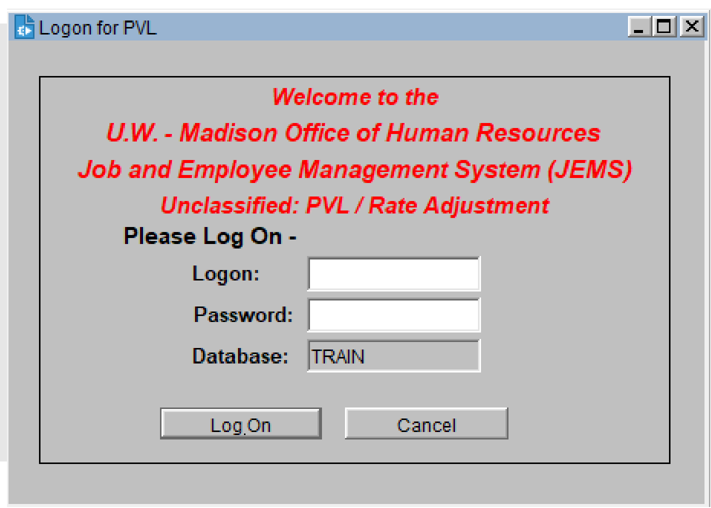
- Spell check is available on all the large text fields (e.g., Duties Tab), right click in the field to get Spell Check from the ‘floating’ menu.

- There is mention to the HRS Knowledgebase throughout this manual. You can access the HRS Knowledgebase here: https://kb.uwss.wisconsin.edu/.

Accessing the Rate/Title Adjustment System

To access the JEMS – Rate and Title Adjustment system, it is required that access is approved from your Division HR Office. When accessing the JEMS Homepage, there will be a JEMS Authorization Form (https://hr.wisc.edu/docs/jems-authorization-form.pdf) that must be completed and submitted to JEMSaccess@ohr.wisc.edu. Once access has been granted, an email will be sent to the user granting access.





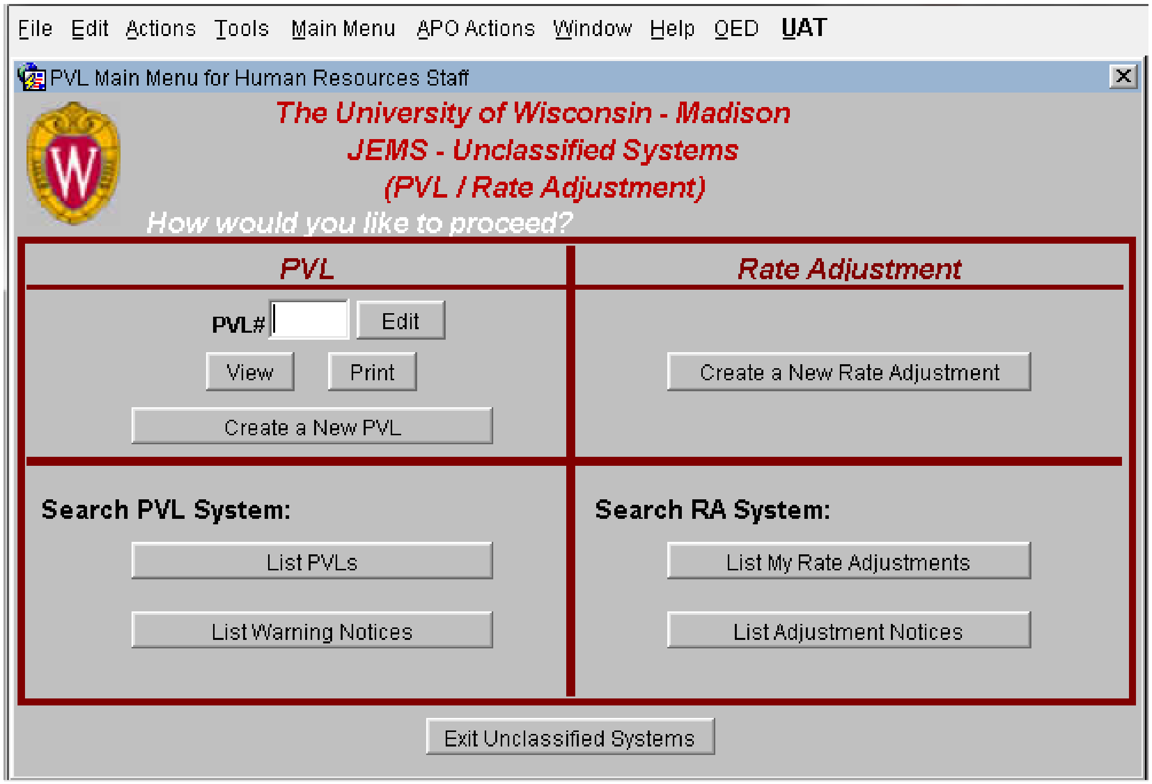
1	Access the JEMS Homepage	https://hr.wisc.edu/hr-professionals/systems/jems/
2	Click Login	Click on **JEMS PVL and Rate/Title Change System Login** button
4	Popup Screen	The JEMS PVL and Rate/Title Change Login system will appear in a new window
3	PVL/Rate Adjustment System	Enter Logon and Password and click the **Log On** button
4	Log In	Click Log On

Steps for Updating Password

The system will require each individual to update their password to a permanent password the first time they access the PVL and R/T Adjustment system.

1	Click on link	http://fastar.wisconsin.edu/pass_chg.html
2	Access reset password portal	Click on Password Update for UW Production
3	Update Password	Update user password
4	Submit	Click on **Submit** button

Main Menu Screen

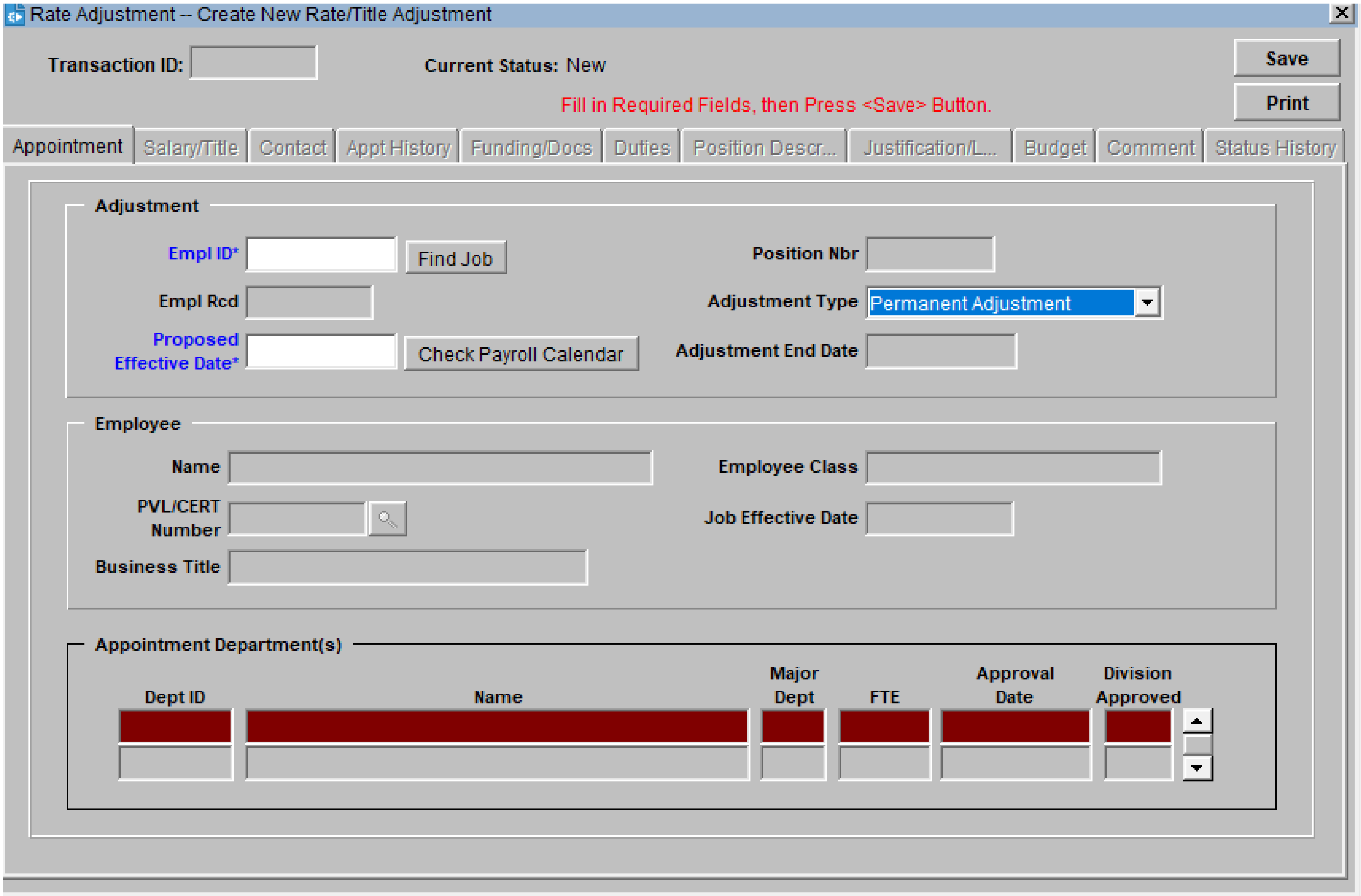


The PVL Main Menu Screen functions include:	
1	Click **Create a New Rate Adjustment** button to start a new Rate/Title change for an employee
2	Click **List My Rate Adjustments** button to see Rate/Title change records in progress
3	Click **List Adjustment Notices** button to see system notices the require review
4	Click **Exit Unclassified Systems** to exit

List of Tabs and Descriptions

Tab	Description
Appointment	The Appointment tab contains basic data about the Rate/Title Adjustment transaction, the employee, and the employee's appointment department
Salary/Title	The Salary/Title tab is where the Rate/Title change reasons, the proposed salary and proposed title information is entered, updated and viewed
Contact	The Contact tab is where information about the primary and additional contact is entered, updated or viewed
Appt History	The Appt History tab displays summary data regarding the person's employment history with UW (including the appointment referenced on the current Adjustment)
Funding/Docs	The Funding/Docs tab is where funding sources for the rate change are entered, updated or viewed. Also, if additional documents for the adjustment are required (such as Market Data), it is the place where the document received dates are entered, updated or viewed
Duties	The Duties tab is where the person's duties are entered, updated or viewed. This tab is also where the number of FTEs supervised field is found
Position Description	The Position Description tab provides access to information pulled in from the Standard Job Description (SJD) library. This is where percentages are assigned to the responsibilities of the job.
Justification/Lump Sum	The Justification tab is where one can enter, update or view data on how the duties have changed or how the promotion criteria is met (if promotion is selected as one of the change reason codes)
Budget	The Budget tab is where information about the person's budgetary responsibilities is entered, updated and viewed
Comment	The Comment tab is where comments are entered, updated and viewed
Status History	The Status History tab displays the history of statuses that a particular adjustment has had in date order (most recent status on top)

Appointment Tab – Creating a New Rate/Title Adjustment



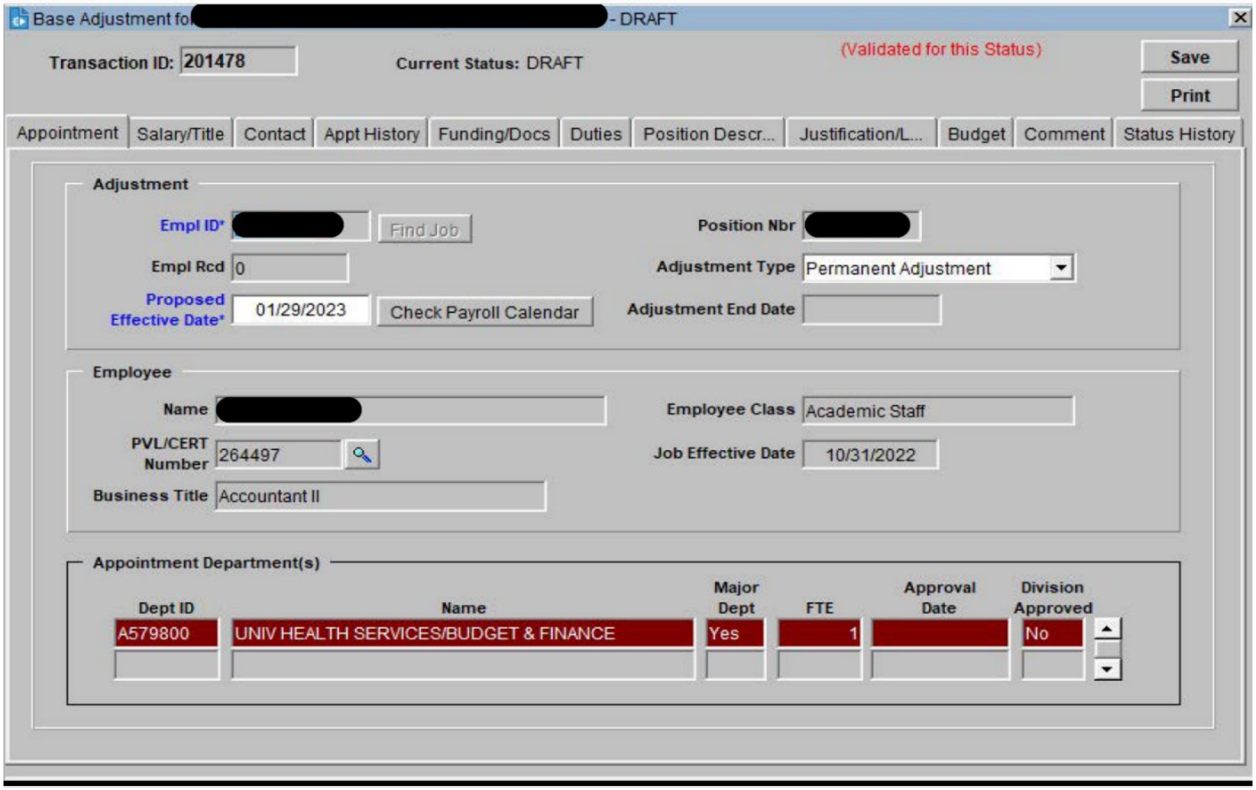
If Create a New Rate Adjustment is selected from the Main Menu, the above screen is displayed.		
A	Complete Adjustment Section	See next page on how to fill out this section
B	Fill out all asterisked fields	Asterisk fields required to do initial save
C	Click **SAVE**	Once **SAVE** is selected, the employee and appointment department(s) section will automatically populate with information from HRS

Appointment Tab Fields

FIELDS	INSTRUCTIONS
Adjustment Section	This section is required to save the transaction. The employee and appointment department's sections will auto populate once the adjustment section data is entered and the transaction is saved
Empl ID*	Enter the employee's Empl ID and click **Find** Job, then select the appropriate job record
Empl Rcd	The Employee Record (Rcd) will automatically populate once the job record is selected
Adjustment Type	Select type of adjustment: • Temporary – No End Date Set • Temporary – End Date Set • Permanent Adjustment • One Time (*NOTE:* JEMS is only used for Lump Sum Payments at the Division level. All Lump sum payment approvals should be entered in Workflow for Additional Pay) • Update PD
Proposed Effective Date*	The adjustment effective date can be the first day of the pay period after the adjustment moves to Department Approved status. Any request for an exception for a date prior to the current date must be routed to Compensation Admin
Position Nbr	The Position Number (Nbr) will automatically populate once the appropriate job record is chosen in the Empl ID field
Adjustment End Date	This field become navigable if Temporary is indicated in the Adjustment Duration field
Employee Section	This section displays employee data pulled from the HRS system. Note: appointment data is not modifiable from the Rate/Title Change System
Name	Employee full name (Last, First Middle Initial)
Empl Class	This is the employment classification for the employee's position
PVL/CERT Number	PVL is the number specific to each Position Vacancy Listing transaction Cert # (transaction #) is pulled from JEMS CHRIS HR
Job Effective Date	Effective Date of the job
Working Title	Working Title of the employee
Appointment Departments Section	This section displays appointment data pulled from the HRS system Note: If the data is incorrect or out of date, you must correct the data in HRS prior to completing the Rate and Title Adjustment transaction
Dept ID	Appointments current department
Name	Name of the department
Major Dept	Indicates whether the department is the major department
FTE	Indicates the status of the position
Approval Date	The date that the division has approved the R/T Adjustment transaction
Division Approved	This is where Divisions/Departments approval of the adjustment is indicated. All Divisions/Department must approve the adjustment prior to the adjustment's status getting updated to Division Approved.

Draft Status

After completing the required data, just prior to the initial <Save>, the screen will look similar to the one displayed below.

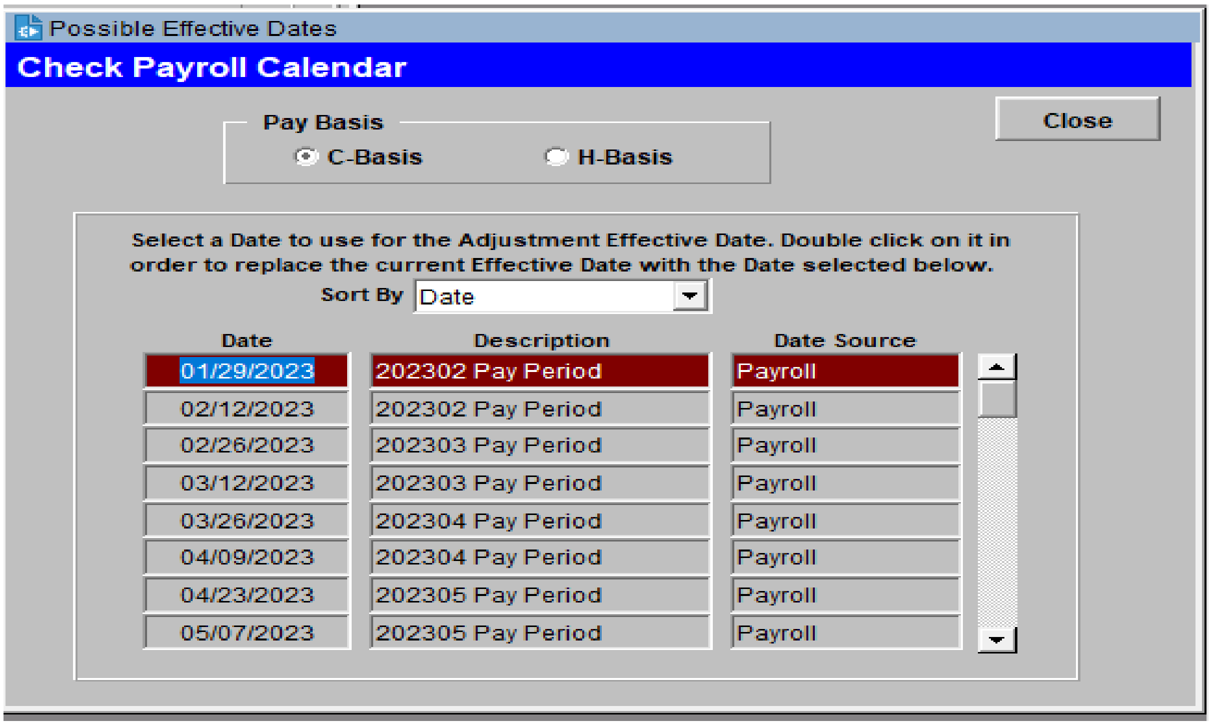


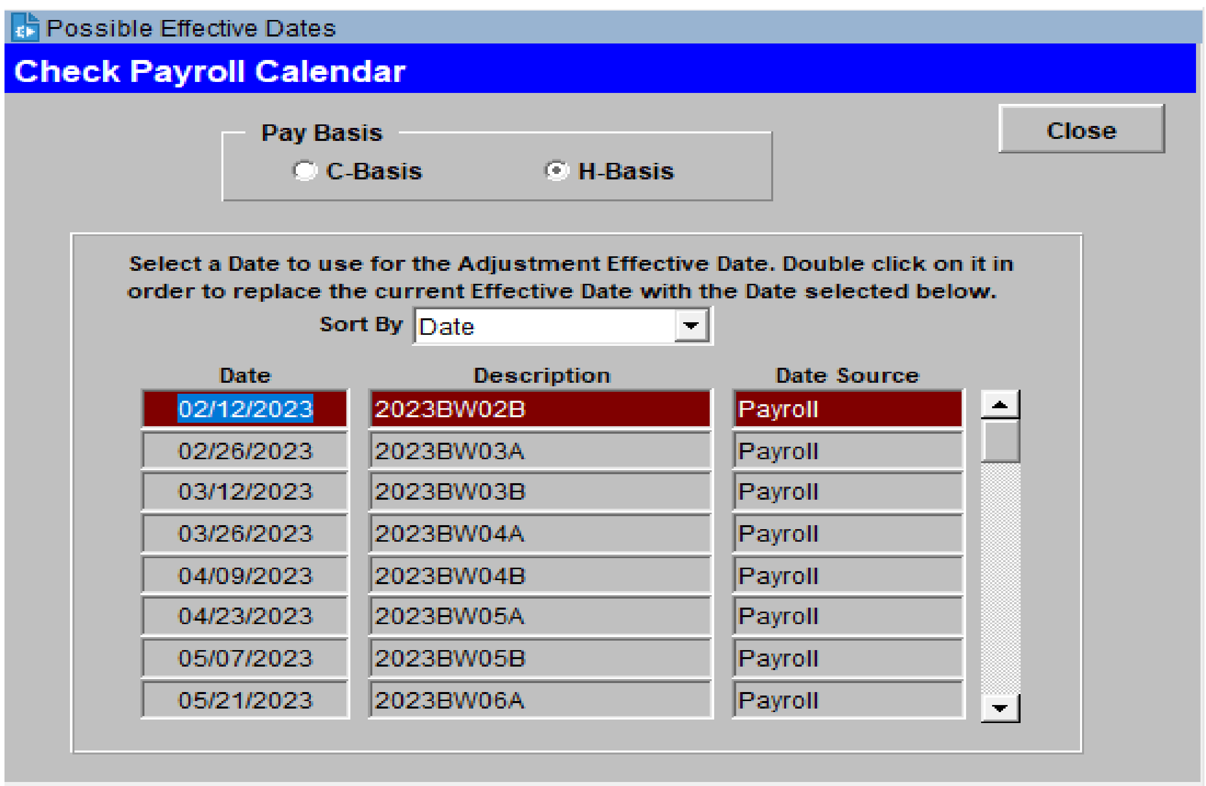
Upon pressing the **Save** button for the new R/T Adjustment transaction for the first time, the system puts the request into Draft status. All tabs on the screen that are appropriate to the R/T will then display and become navigable (no longer grayed out).

Note: The Appointment ID is no longer modifiable after the initial save. If the wrong Appointment ID has been entered into the field, a new adjustment is required, and the Draft of the wrong request should be deleted by selecting Delete RA in the Edit menu.

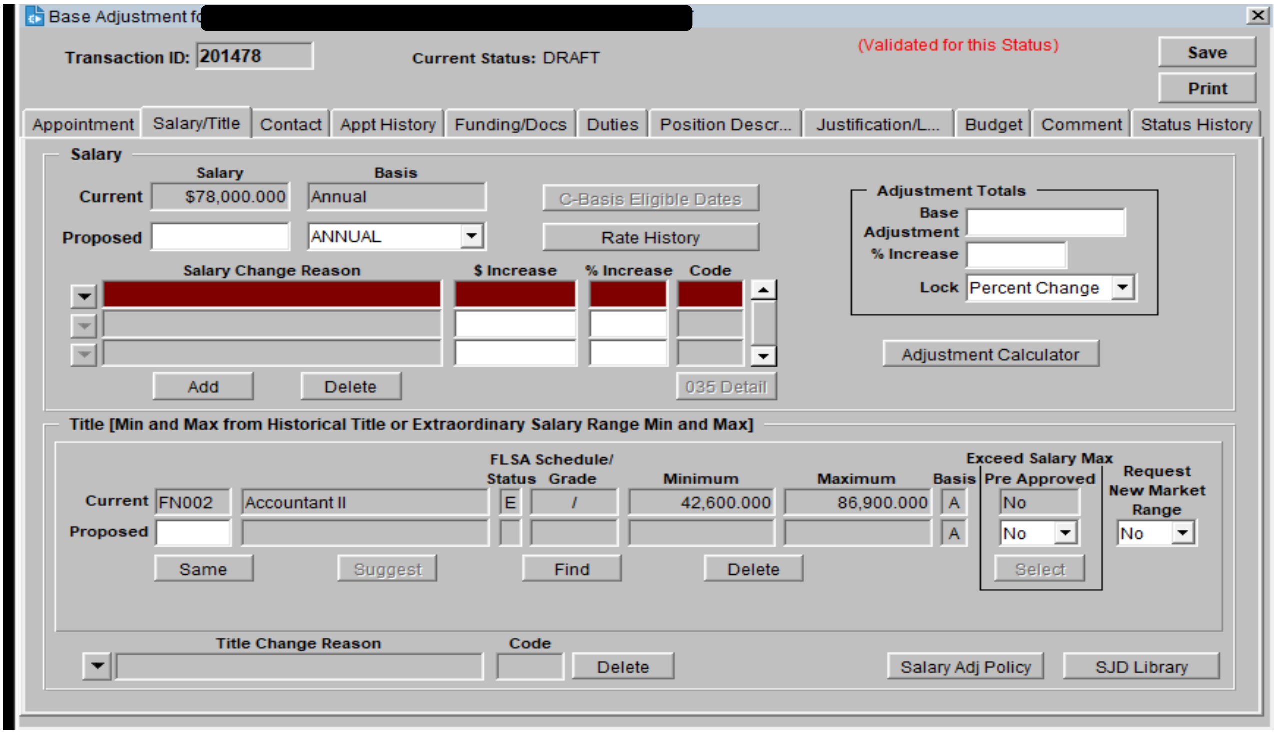
Check Payroll Calendar

This screen is available when pressing the button **Check Payroll Calendar** button on the Appointment tab. The screen lists the H and C-Basis payroll dates. Double click on a record to populate the Adjustment Effective date with a date on the list.



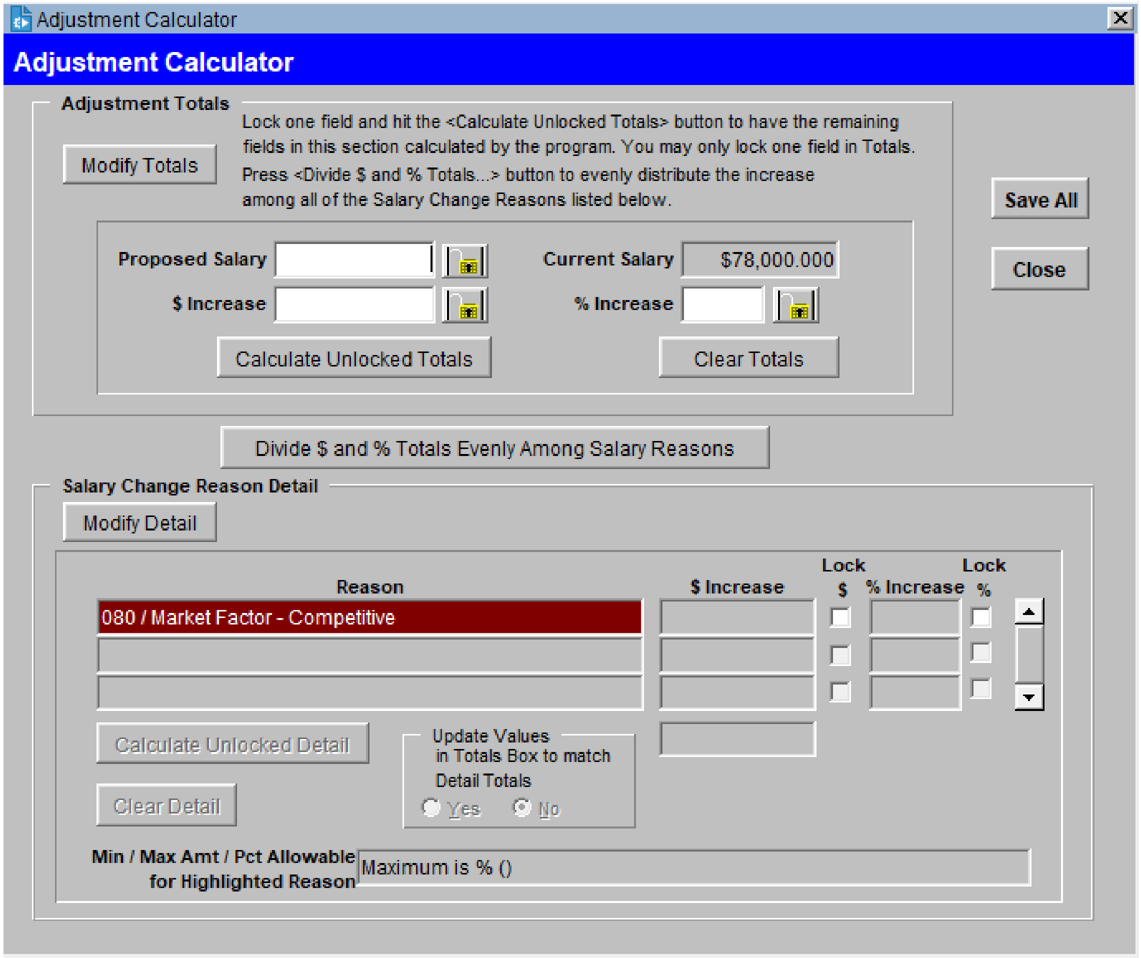


Salary/Title Tab



Field	Description
Proposed Salary	You may either enter the proposed salary here, if known, or use the **Adjustment Calculator** to run calculations and have the program transfer the calculated proposed salary to this field.
Proposed Salary Basis	The default is the Current Salary Basis - modify as needed (academic, annual, or hourly) If changing the current salary basis, use the “Salary Basis Conversion Calculator” to convert the amount from one salary base to the other. Under the “Tools” menu click on “Salary Basis Conversion Calculator” (follow instructions on the popup screen)
Salary Change Reason	Select the appropriate Salary Change Reason(s) from the list using either the **Add** button or the down arrow button to the left of the field. The list is context sensitive. That is, the content of the list varies depending on the appointment type, title, and the major appointment department.
$ Increase	Enter the appropriate Adjustment amount for the Salary Change Reason, or use the **Adjustment Calculator** to run calculations and have the program transfer the calculated amount. Note: the amount may be a negative value, as in the case of a Temporary Adjustment end.
% Increase	Enter the appropriate Adjustment Percentage for the Salary Change Reason, or use the **Adjustment Calculator** to run calculations and have the program transfer the calculated amount. Note: the value may be a negative value, as in the case of a Temporary Adjustment end.
Adjustment Totals – Base Adjustment	Enter the total base adjustment amount. This will auto populate if the **Adjustment Calculator** is used. The Base Adjustment amount is the Proposed (#1) salary minus Current salary (in dollars).
Adjustment Totals - % Increase	Enter the total percent increase. Note: this # is the total sum of all the change reason percentages.
Adjustment Totals - Lock	Indicate which value to Lock in, the Percent or Dollar amount of the Adjustment.

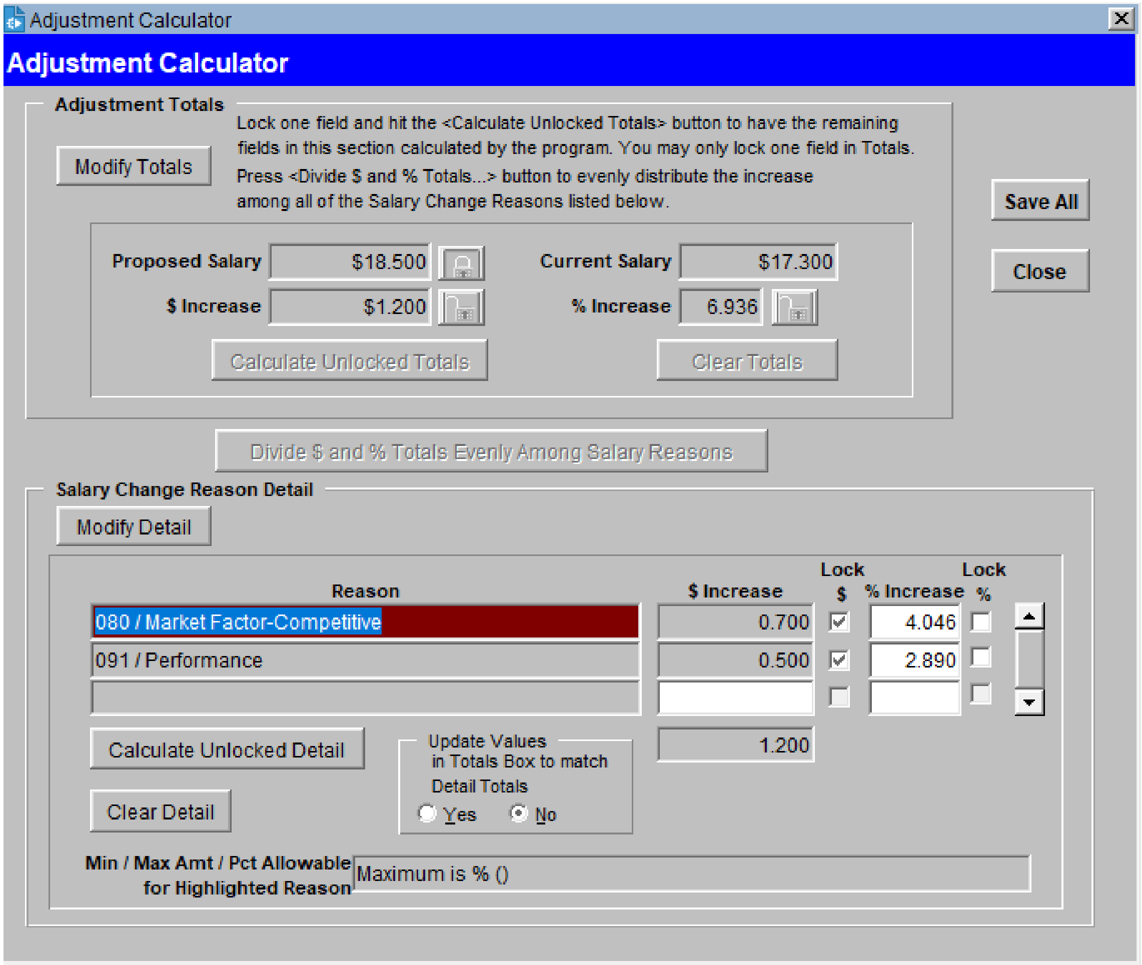
Field	Description
Title - Proposed	Same Title = enter the same title code or click the <Same> button. New Title = enter the known title code in the field, or click <Suggest> to see other titles in the same series <Find> button = for a list of all titles for the Employee's appointment type.
Exceed Salary Max Pre-Approved	The field is position specific and not title specific. Selecting YES is required ONLY when the department wishes to use a pre-approved salary that is above the salary maximum. If set to YES, the <Select> button is made available. Click the <Select> button to go to the screen that will allow you to choose a Pre-Approval record to support the higher market range. You must make a selection if the field is set to YES. **Yes** = Has a pre-approved extraordinary salary range. **No** = Does not have a pre-approved extraordinary range (default).
Request New Market Range	The field is no longer used.
Title Change Reason	If the title will change with this Adjustment, enter a Title Change Reason. The Title Change Reason must match one of the Salary Change Reason codes, if this is a Title and Salary adjustment (e.g. 03/003). The field is blank if the Title remains the same.
Salary Adj Policy	If clicked, will open a new browser window and display UW-5023: Salary Adjustments policy.
SJD Library	If clicked, will open a new browser window and display the Standard Job Description Library.



The top portion of the screen is used to calculate changes to the ‘Totals’ fields on the Adjustment. The bottom portion of the screen is used to calculate the amounts and percent changes for each Salary Change Reason.

Select which portion of the screen to work on (top or bottom). The system only allows one section to be modified at a time.

e.g. Say you are targeting a Proposed Salary of $90,000 for this appointment; Enter that amount into the Proposed Salary field. In order to calculate the $ Increase and % Increase fields for the total, Click the ‘Lock in’  button to the right of the Proposed Salary. Click the <Calculate Unlocked Totals> button and the system will fill in the ‘$ Increase’ and ‘% Increase’ fields.



The amount can be distributed between multiple Salary Change Reasons. Click the <Divide $ and % Totals Evenly Among Salary Reasons> button. This will distribute the amount evenly between all the reasons listed.

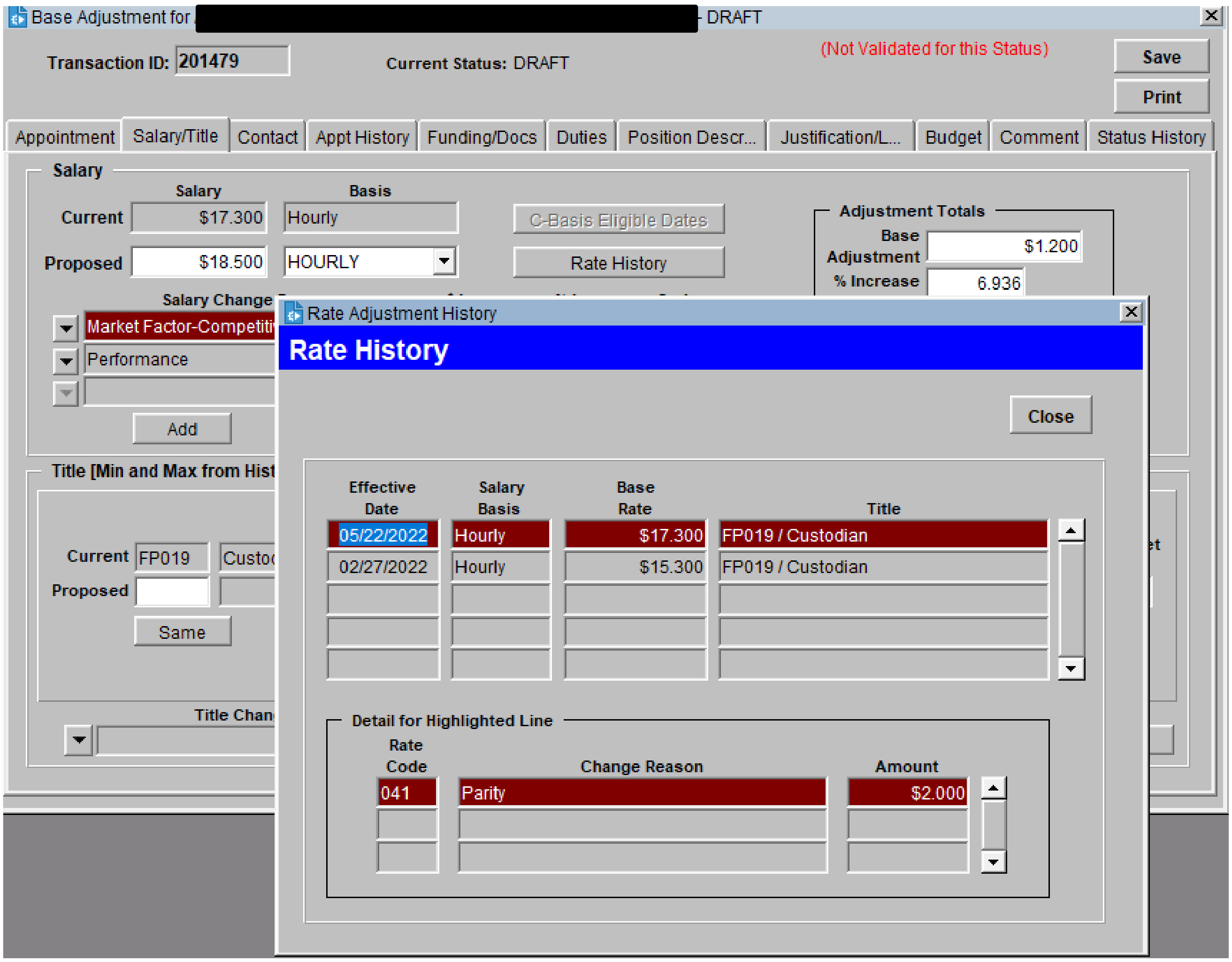
Use the <Modify Detail> button to adjust the $ Increase and % Increase amounts.

Use the lock checkboxes similar to the top section of the Adjustment Calculator and click <Calculate Unlocked Detail> button.

e.g. if you wanted to change the 003/Promotion/Progression reason to increase to 8 %, click on the <Modify Detail> button, change the % Increase to 8 on the reason line, check the checkbox in the Lock % column, and click on the <Calculate Unlocked Detail> button. It will change the unlocked fields accordingly.

Click <Save All> for the changes to copy to the "main" Salary/Title Tab. These fields can be modified up until the R/T change is submitted for approval.

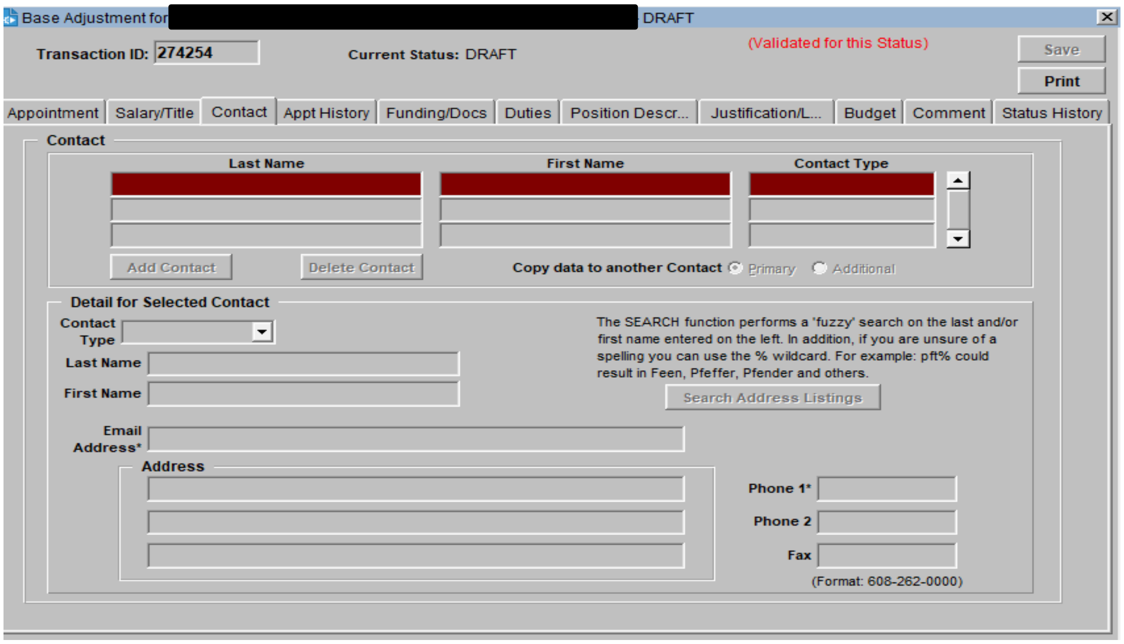
Rate History Screen Tab



If the <Rate History> button is clicked on the Salary/Title Tab, all of the Rate changes to date for the Position # entered on the Appointment tab (including Merit) will be viewable. The upper scrolling region has the rate change summary by date. The lower scrolling region displays detail for the rate change selected in the upper scrolling region.

e.g. if more than one Rate Change Reason was applied on that date, the detailed breakdown of Rate Reason and Amount shows in the Detail box.

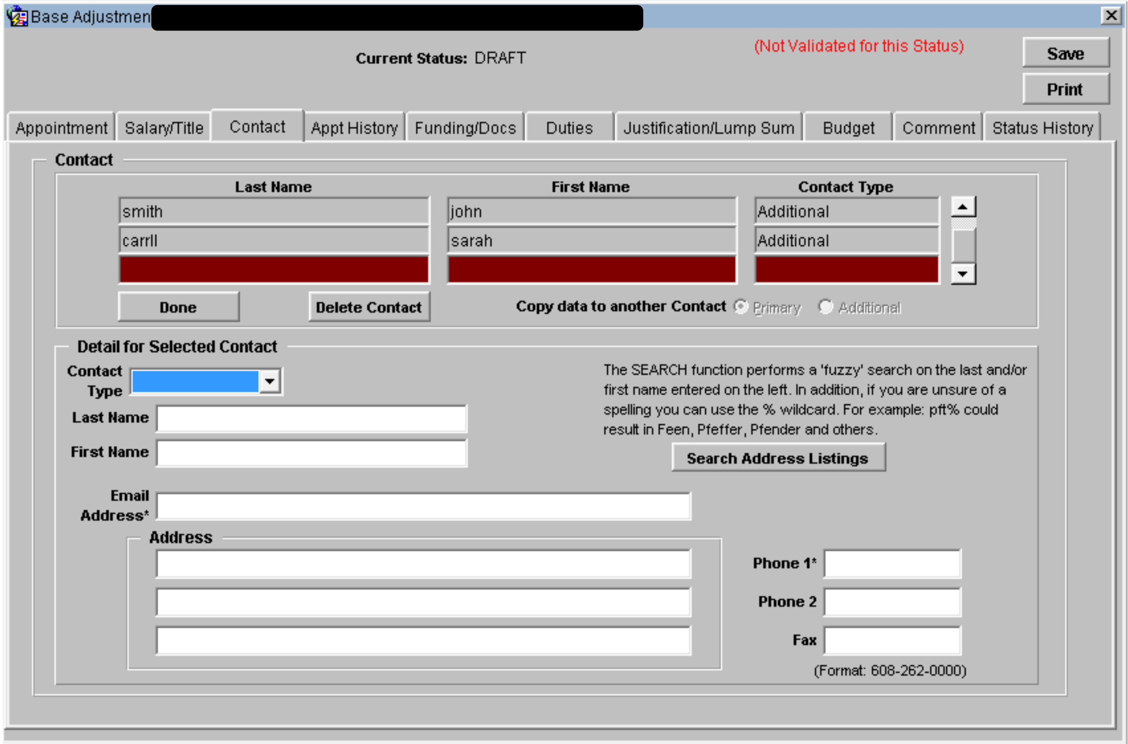
Contact Tab



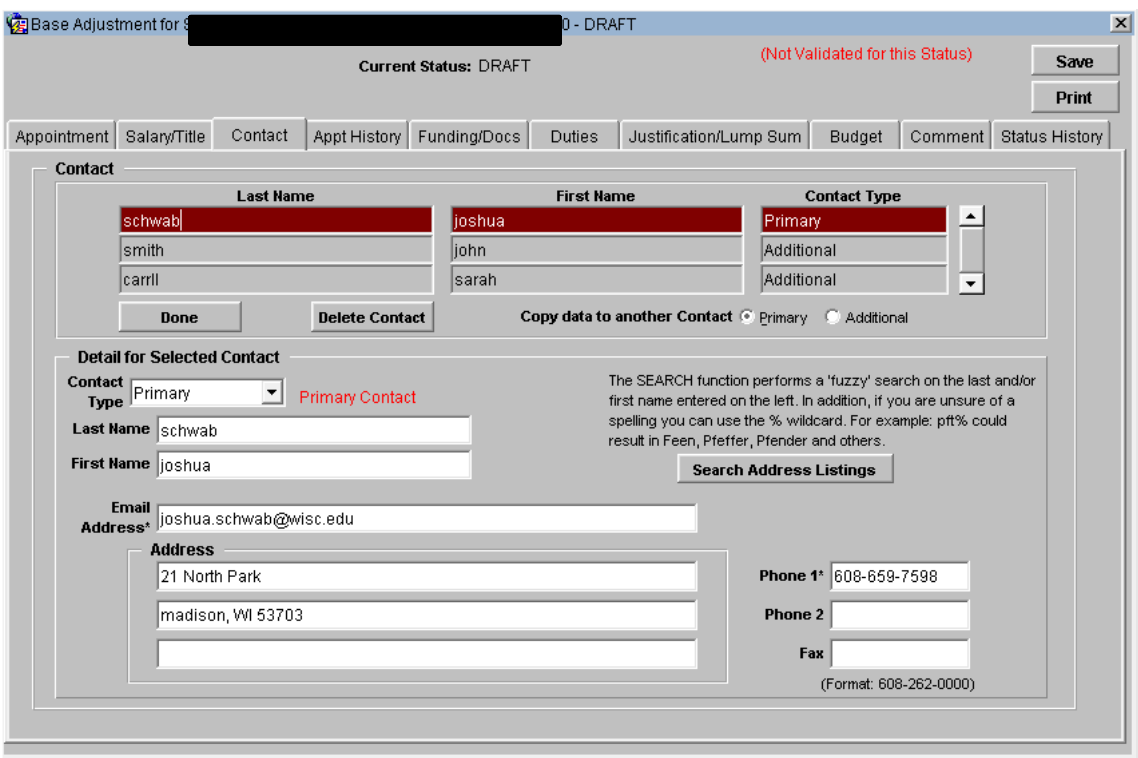
This tab stores information about one or more persons who may be contacted about the R/T Adjustment. You may have any number of Additional Contacts added. If you are unsure of a contacts information, click on the <Search Address Listings> button. A screen will popup that you can search using the contacts name (this information pulls from the directory).

Field	Description
Add Contact Button	Click the <Add Contact> button, this will open up the entry fields in the bottom portion of the screen.
Contact Type*	Primary Contact: The individual whose name should appear on the PVL. Additional: Name of a secondary contact. This information will not show on the PVL.
Last Name*	Enter last name.
First Name*	Enter first name plus any prefixes.
Email Address*	Enter email address.
Address*	For the Primary Contact, the address should be the U.S. mailing (including zip code) address.
Phone 1*	Enter 10-digit phone number.
Phone 2*	Additional contact number of contact (not required).
Fax	Optional.

Contact Tab cont’d

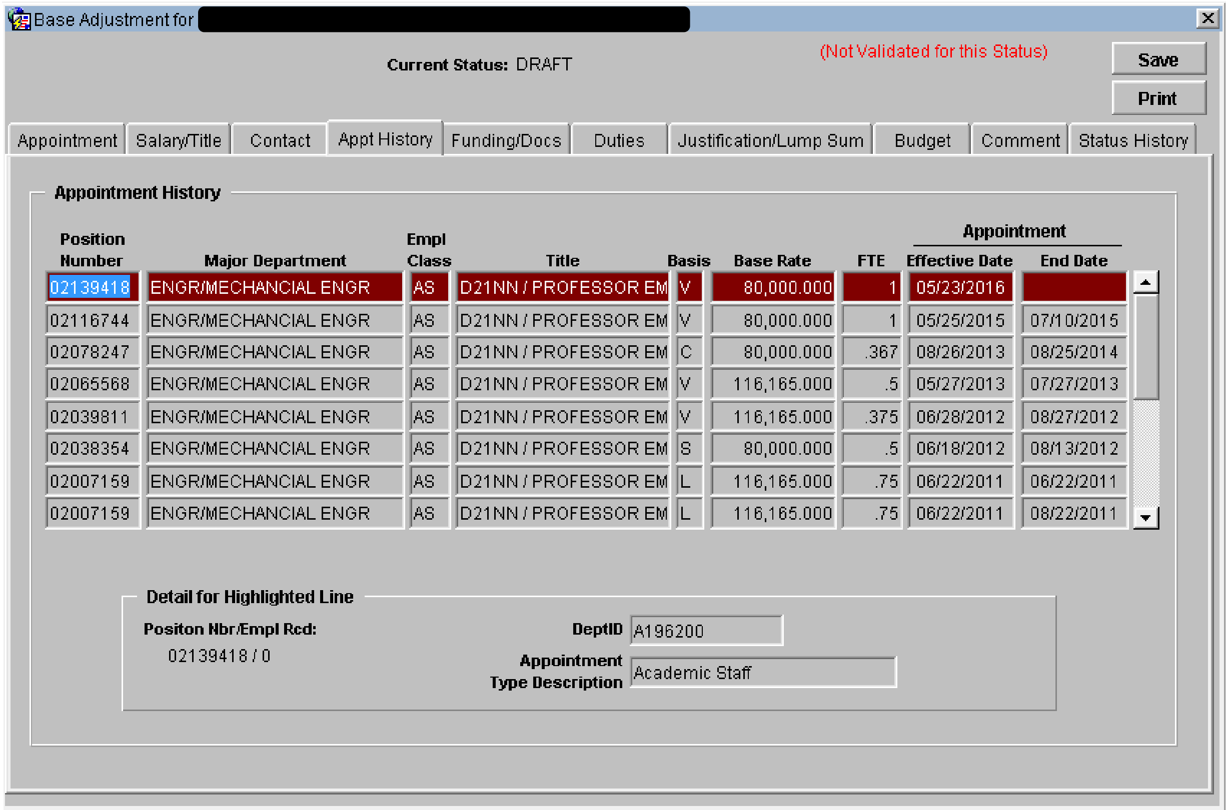


Press the <Done> button when entry is completed.



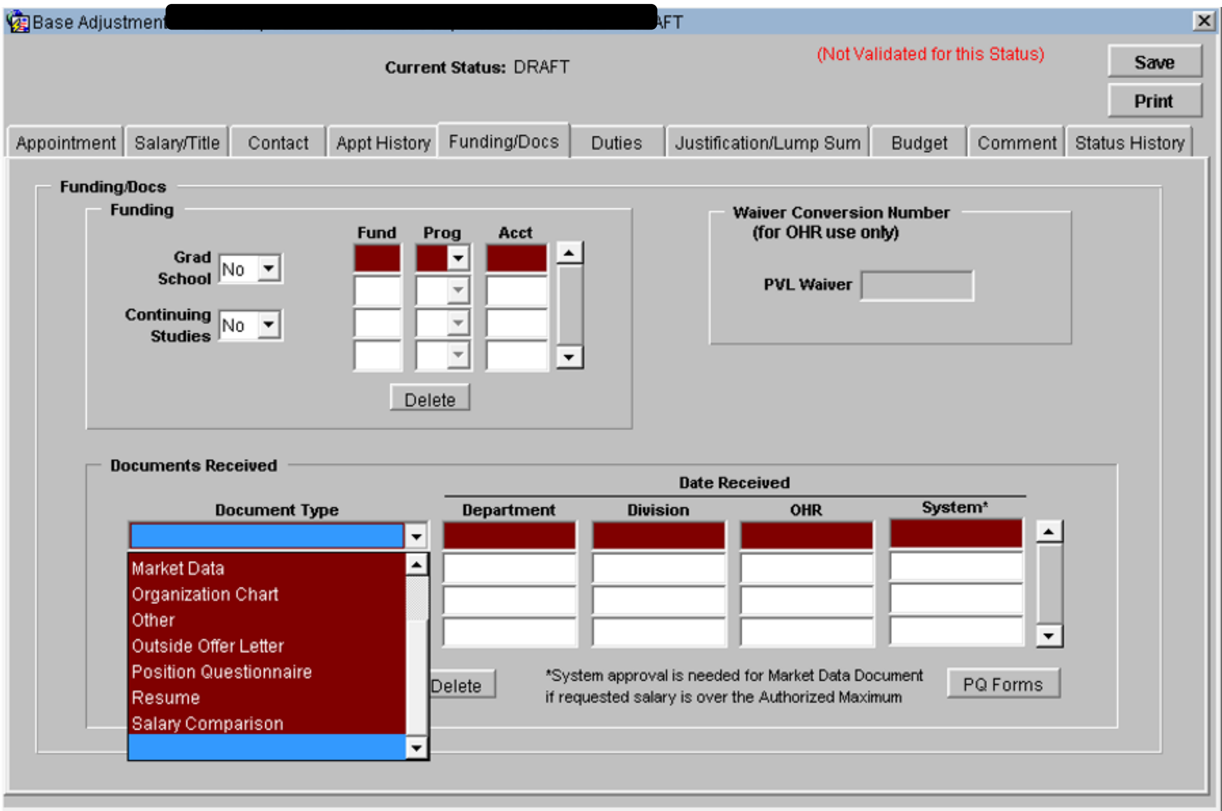
Multiple contacts can be added or copied to different Contact Type (Primary, Administrative, or Alternate).

Appointment (Appt) History Tab



The Appointment History Tab displays a history of the Employee's appointments with the UW in summary form. This data is pulled from the HRS system.

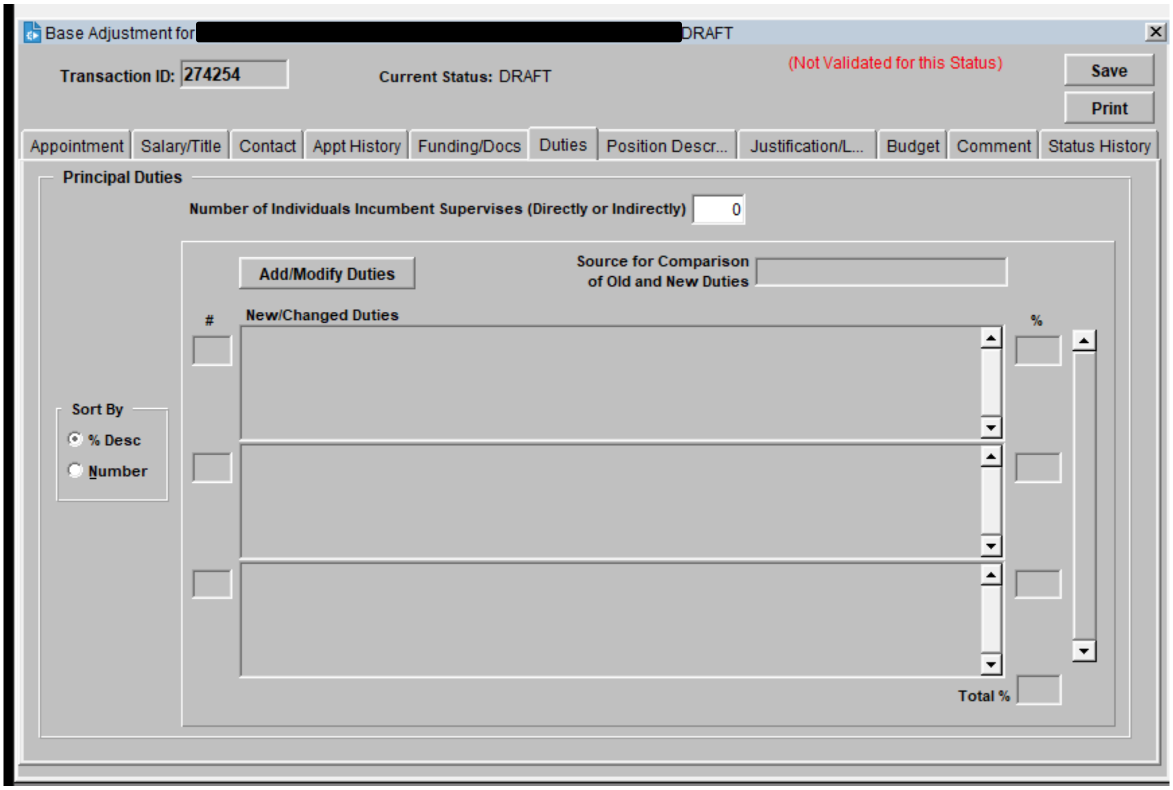
Funding/Docs Tab



Indicate the funding sources for the rate change. If additional documentation is needed to support the Rate and/or Title change, the appropriate document type must be selected, and the date received at the various offices must be noted.

FIELD	Instructions
Funding: Grad School	The option defaults to NO. Indicate "Yes" if the position has Graduate School funding.
Funding: Continuing Studies	The option defaults to NO. Indicate "Yes" if the position has Continuing Studies funding.
Fund	Type of funds e.g. 101. 133. 144
Program Code	Enter Program Code. To review the definitions of each program code, access the UW System Website: https://www.wisconsin.edu/financial-administration/accounting-and-budget-control/chart-of-accounts/
Account	Account Number
Document Type	Select the appropriate Document Type from the drop down list.
Date Received: Department	Indicates the date the document was received by the departmental office.
Date Received: Division	Indicates the date the document was received by the division office.
Date Received: OHR	Indicates the date the document was received by OHR.
Date Received: System	Indicates the date the document was received by UW System (only applies to Market Data)

Duties Tab

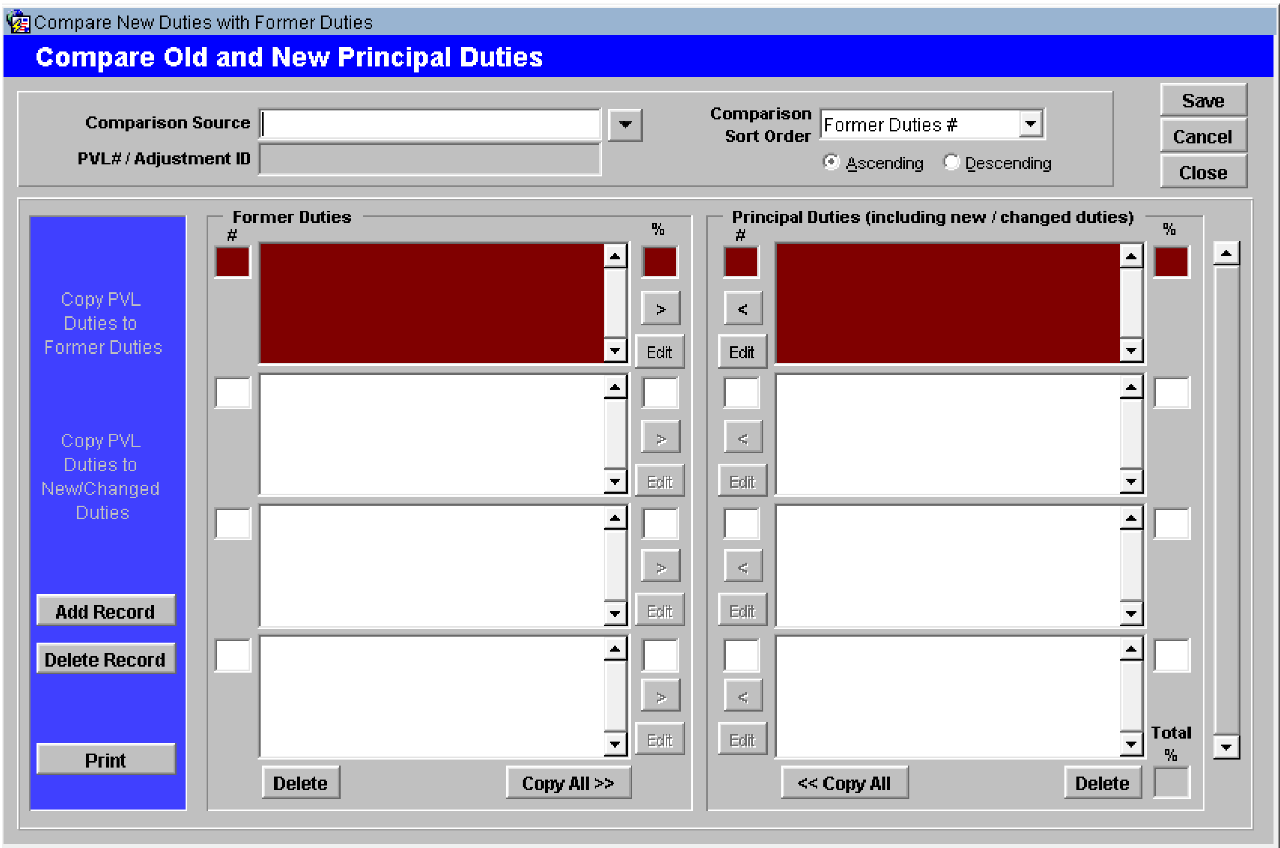


Whenever the following rate change reasons are used, it is required to provide the former and the current duties. Although percentage breakdown is strongly encouraged for Former Duties, it is a requirement for the Current Duties.

001 – Change in Resp & Title
025 - Temporary
030 - Due to Title Appeal
054 – New title assignment
093 - Change in Unique Responsibilities

FIELD	DETAILS
Number of FTEs Supervised	Number of FTE(s) employee supervises both directly and indirectly (through subordinates).
Add/Modify Duties	Use the <Add/Modify duties> button to navigate to the “Compare Old and New Principal Duties” screen. If Principal Duties are required for the submission of the Adjustment, first complete the “Compare Old and New Principal Duties” screen. **The above screen will automatically populate once the “Compare Old and New Principal Duties” have been filled out on the Add/Modify Duties screen.**
#	Line number to identify the individual duty. **This information will automatically populate from the “Compare Old/New Duties” screen.**
New/Changed Duties	Describe the principal duties and responsibilities of the position (including new duties and changes in/additional responsibilities). **This information will automatically populate from the “Compare Old/New Duties” screen.**
%	Indicate what portion of the job, each individual duty comprises (the percentages should total to 100%). **This information will automatically populate from the “Compare Old/New Duties” screen.**

Compare Old and New Principal Duties Screen



If Principal Duties are required for the submission of the Adjustment, you must also complete the Compare Old and New Principal Duties screen (as shown above).

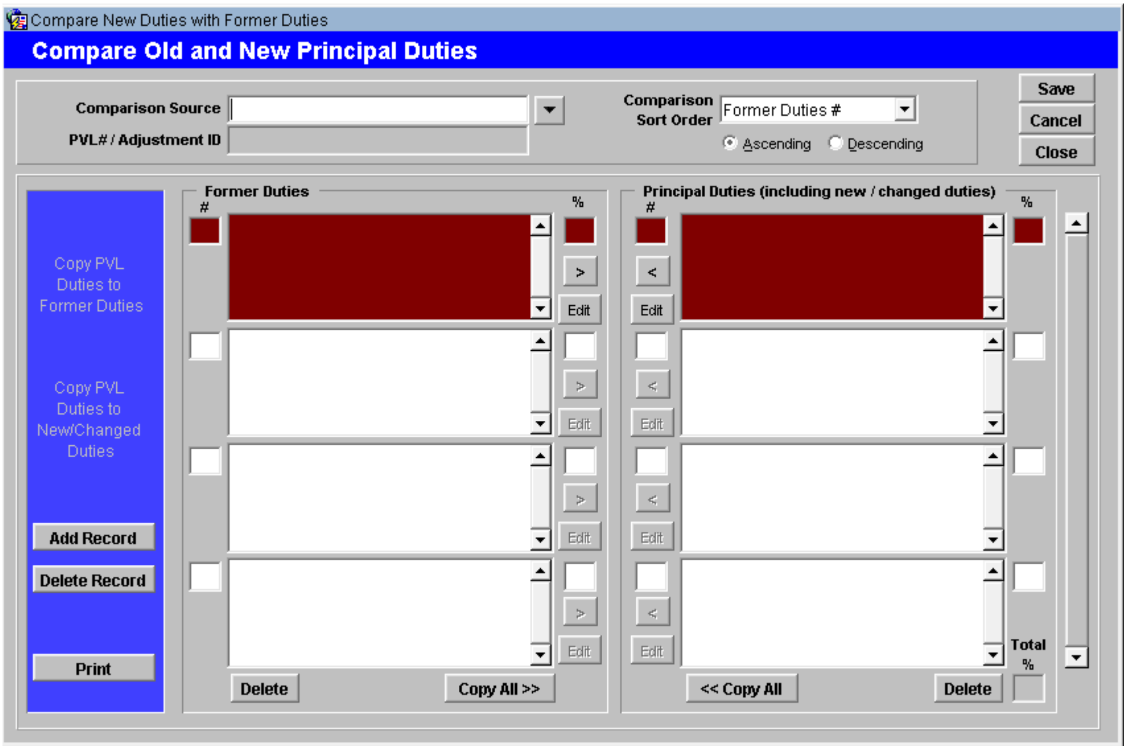
The left hand section of the screen (labeled 'Former Duties') should list, in itemized form, the employee's former duties (the source for this can be the PVL the person had been hired under, a prior Rate/Title Change, the Update PD created for the Title and Total Compensation Project or any other document that had been filed with the OHR office describing the position). The right side of the screen, labeled 'New/Changed Duties' should indicate what had changed (the duty itself or the proportion of time the duty occupies for the position (the percentage).

If the "Former Duties" side is blank, start completing this section first, numbering each line and assigning a percentage for each duty.

Use the arrow button (they look like this) pointing to the right side to move the duties that the person is still performing to the "New/Changed Duties" column. If there is a change in that section, indicate what changed, if anything (the duty itself or the percentage of the position) on the "New/Changed Duties" side. If the duty is no longer performed, you may leave the #/duty/% fields blank.

Note: spell check is available on all of the large text fields (right click to get Spell Check from the floating menu).

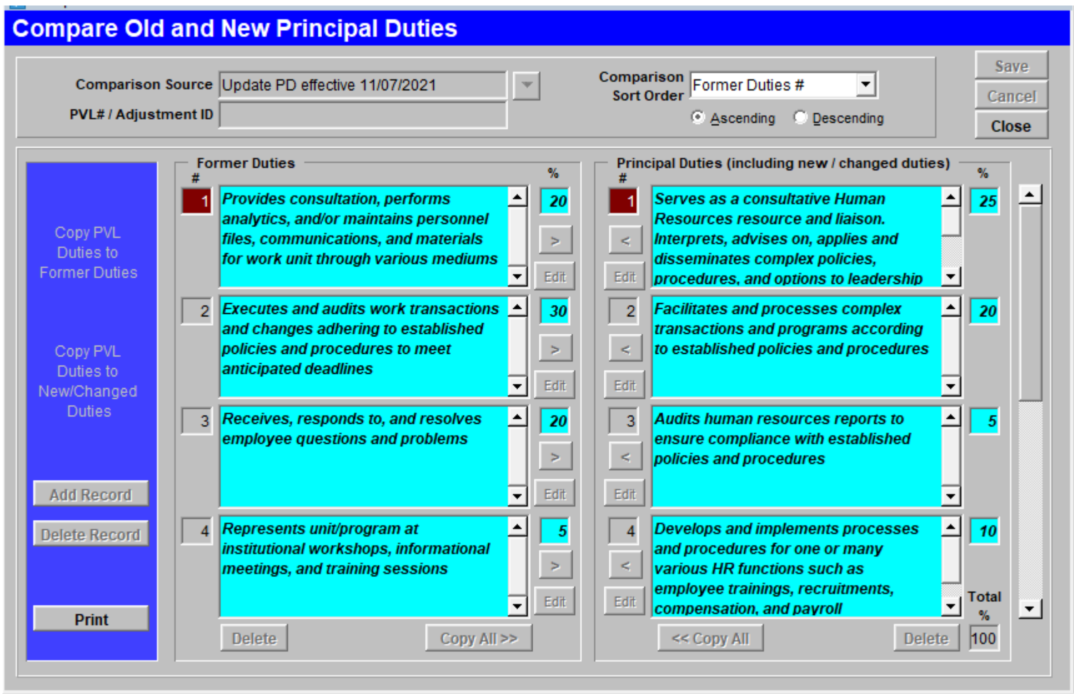
Compare Old and New Principal Duties Screen cont'd



The table below discusses features that are found on this page and their functionality.

Feature	Functionality
Comparison Sort Order	You may sort the data on the screen using any of the options in the drop down.
Ascending/Descending	Use these buttons to further refine the Comparison Sort Order.
> **<**	Use the **> <** buttons to copy data from one side to the other
#	This field should be numbered sequentially. The order in which the duties are listed can change based on position and duty changes.
%	Indicate the proportion of time spent for each duty in % format. % can change if the position and duties change.
Copy PVL Duties to Former Duties	If there is a PVL associated with the Appointment ID and the Principal Duties text is stored in the PVL system you can bring up a popup where the information can be cut and copied.
Copy PVL Duties to New/Changed Duties	If there is a PVL associated with the Appointment ID and the Principal Duties text is stored in the PVL system you can bring up a popup where the information can be cut and copied.
Add Record	This button will add a new line on the bottom (both left and right sides of screen).
Delete Record	This button will delete an entire line of data (both left and right sides). Note that you must have the cursor on the line you wish to Delete, before hitting the button.
Use the PRINT button to print a hard copy of this page	Use the PRINT button to print a hard copy of this page
Use the COPY ALL button to copy all data from one side to the other	Use the COPY ALL button to copy all data from one side to the other
Delete	Use the DELETE all buttons to remove content from a field

Compare Old and New Principal Duties Screen cont'd



The table below outlines information regarding making adjustments to duties.

Former Duties to Principal Duties	
Teal Color	Upon saving changes, the program will color the changed data with a teal background (see example above).
Blank fields	If the duty is being added or removed from the position the adjacent field should be left blank. In the example above, the #4 Former Duty is no longer part of the change in duties.
Copy PVL Duties to New/Changed Duties	If there is a PVL associated with the Appointment ID and the Principal Duties text is stored in the PVL system you can bring up a popup where the information can be cut and copied.
Add Record	This button will add a new line on the bottom (both left and right sides of screen).
Delete Record	This button will delete an entire line of data (both left and right sides). Note that you must have the cursor on the line you wish to Delete, before hitting the button.
Use the PRINT button to print a hard copy of this page	Use the PRINT button to print a hard copy of this page
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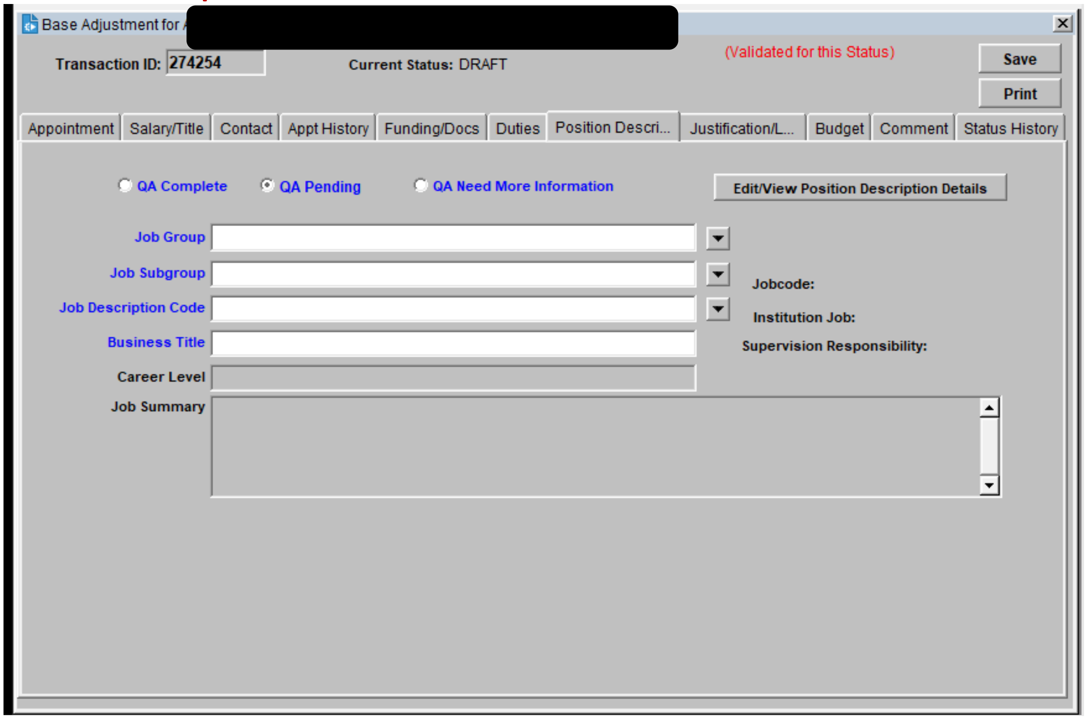
Position Description Tab

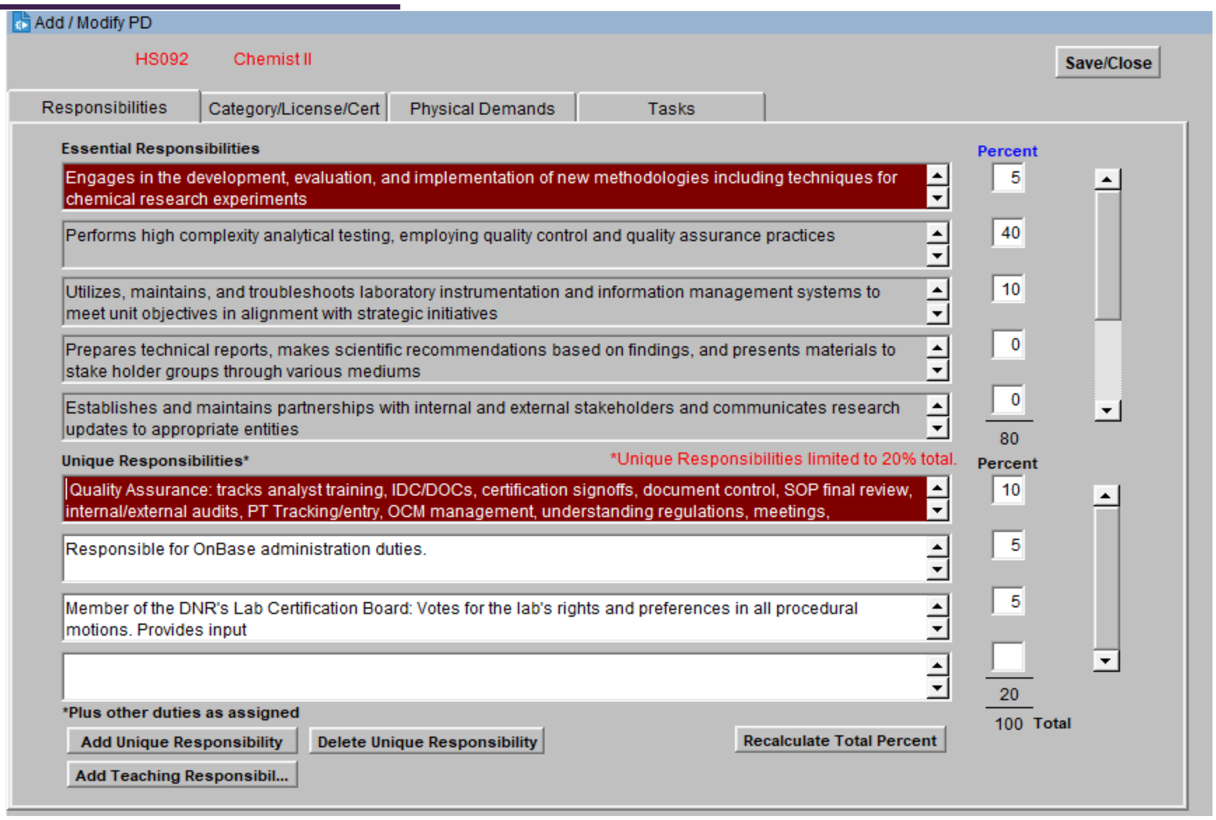


For all rate/title adjustments, the PD tab will automatically pull in the employee's assigned SJD. For the following rate adjustments reasons, the PD percentages will need to be added. In addition, any rate/title adjustment that has a title change, the PD percentages will need to be added.

- 001 – Change in Resp & Title
- 025 - Temporary
- 030 - Due to Title Appeal
- 054 – New title assignment
- 093 - Change in Unique Responsibilities

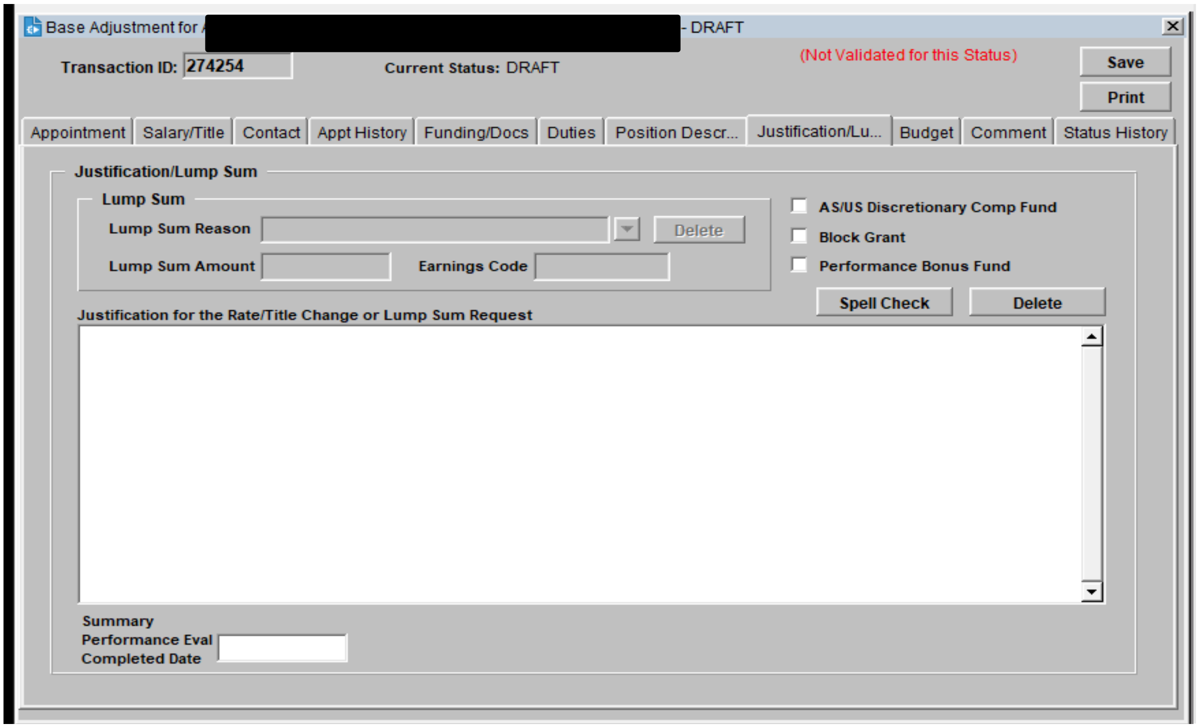
For all rate/title adjustments, the PD tab will automatically pull in the employee's assigned SJD. For the following rate adjustments reasons, the PD percentages will need to be added. In addition, any rate/title adjustment that has a title change, the PD percentages will need to be added.

<Click> Edit/View Position Description Details. The PD tab will open to show all the SJD's responsibilities. Please refer to the "Tips for Writing Unique Responsibilities" for information on how to add unique responsibilities.


Add / Modify PD
HS092
Chemist II
Save/Close
Responsibilities
Category/License/Cert
Physical Demands
Tasks
Essential Responsibilities
Percent
Engages in the development, evaluation, and implementation of new methodologies including techniques for chemical research experiments
5
Performs high complexity analytical testing, employing quality control and quality assurance practices
40
Utilizes, maintains, and troubleshoots laboratory instrumentation and information management systems to meet unit objectives in alignment with strategic initiatives
10
Prepares technical reports, makes scientific recommendations based on findings, and presents materials to stake holder groups through various mediums
0
Establishes and maintains partnerships with internal and external stakeholders and communicates research updates to appropriate entities
0
80
Unique Responsibilities*
*Unique Responsibilities limited to 20% total.
Percent
Quality Assurance: tracks analyst training, IDC/DOCs, certification signoffs, document control, SOP final review, internal/external audits, PT Tracking/entry, OCM management, understanding regulations, meetings,
10
Responsible for OnBase administration duties.
5
Member of the DNR's Lab Certification Board: Votes for the lab's rights and preferences in all procedural motions. Provides input
5
20
*Plus other duties as assigned
Add Unique Responsibility
Delete Unique Responsibility
Recalculate Total Percent
100 Total
Add Teaching Responsibil...

Justification Tab

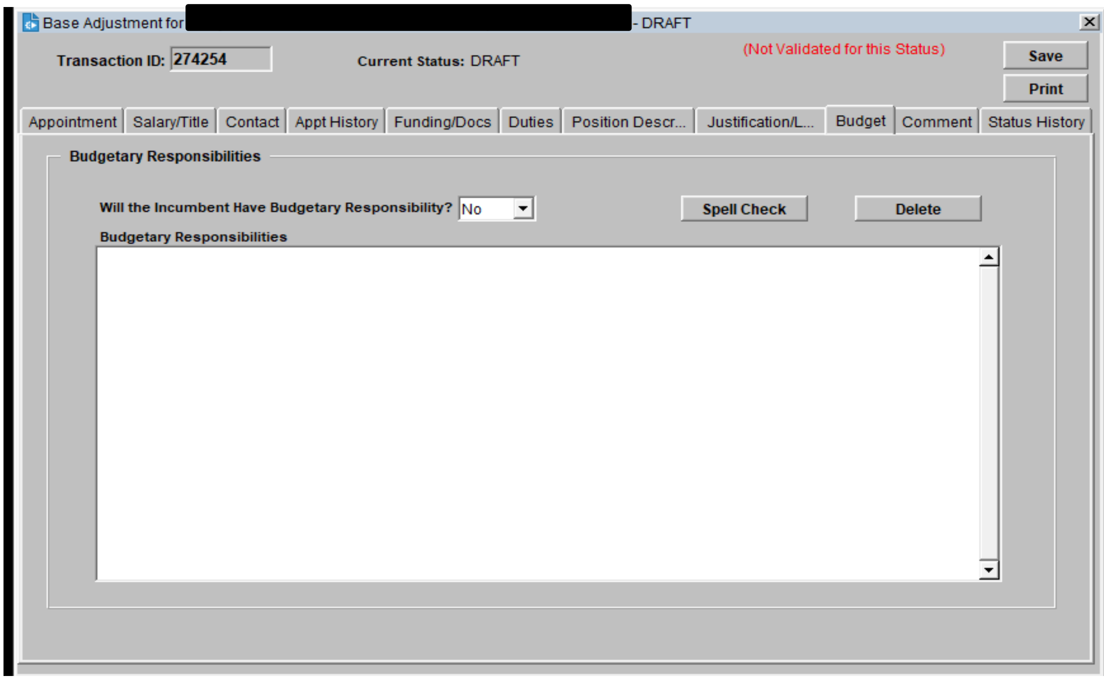
****If the adjustment is for Performance,** from this point forward please refer to the [Performance Base Adjustment Delegation Training Manual].



Justification is required upon Department Approval when applying certain Rate Change Reason codes for the Adjustment. Indicate in the blank space, justification supporting the Rate/Title Adjustment request.

For guidance on what should be included in Justifications, please see the Salary Adjustment Justification Matrix

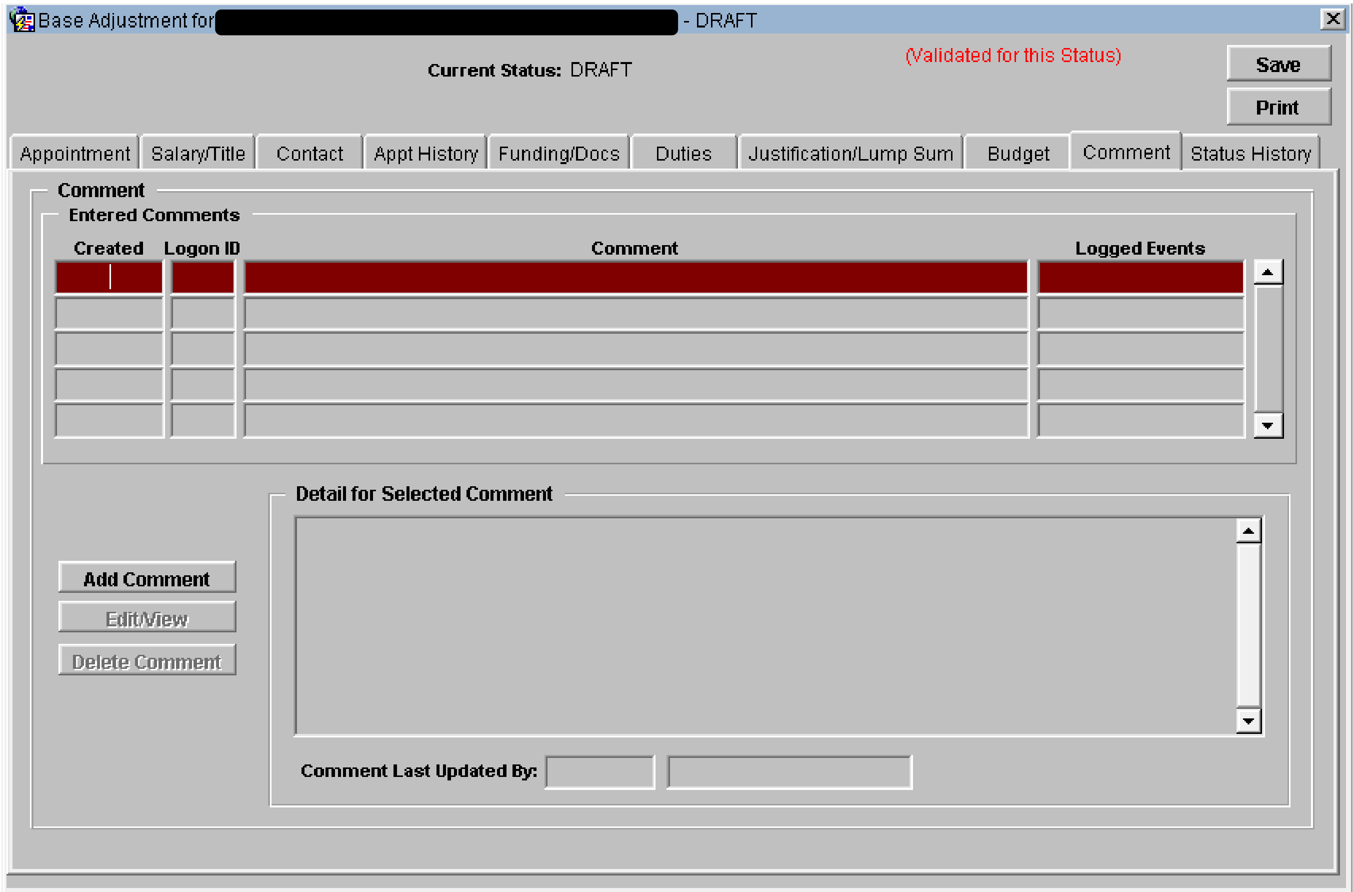
Budget Tab



Budgetary Responsibility is required upon Department Approval when applying certain Rate Change Reason codes for the Adjustment.

Field	Description
Will the Incumbent Have Budgetary Responsibility?	Yes/No, as appropriate, if the person will have budgetary responsibility.
Budgetary Responsibility	If the budget responsibility is "Yes", list in detail the specific budgetary responsibilities the incumbent will have.
Spell Check	Use this to spell check your text.
Delete	Use this to delete your text

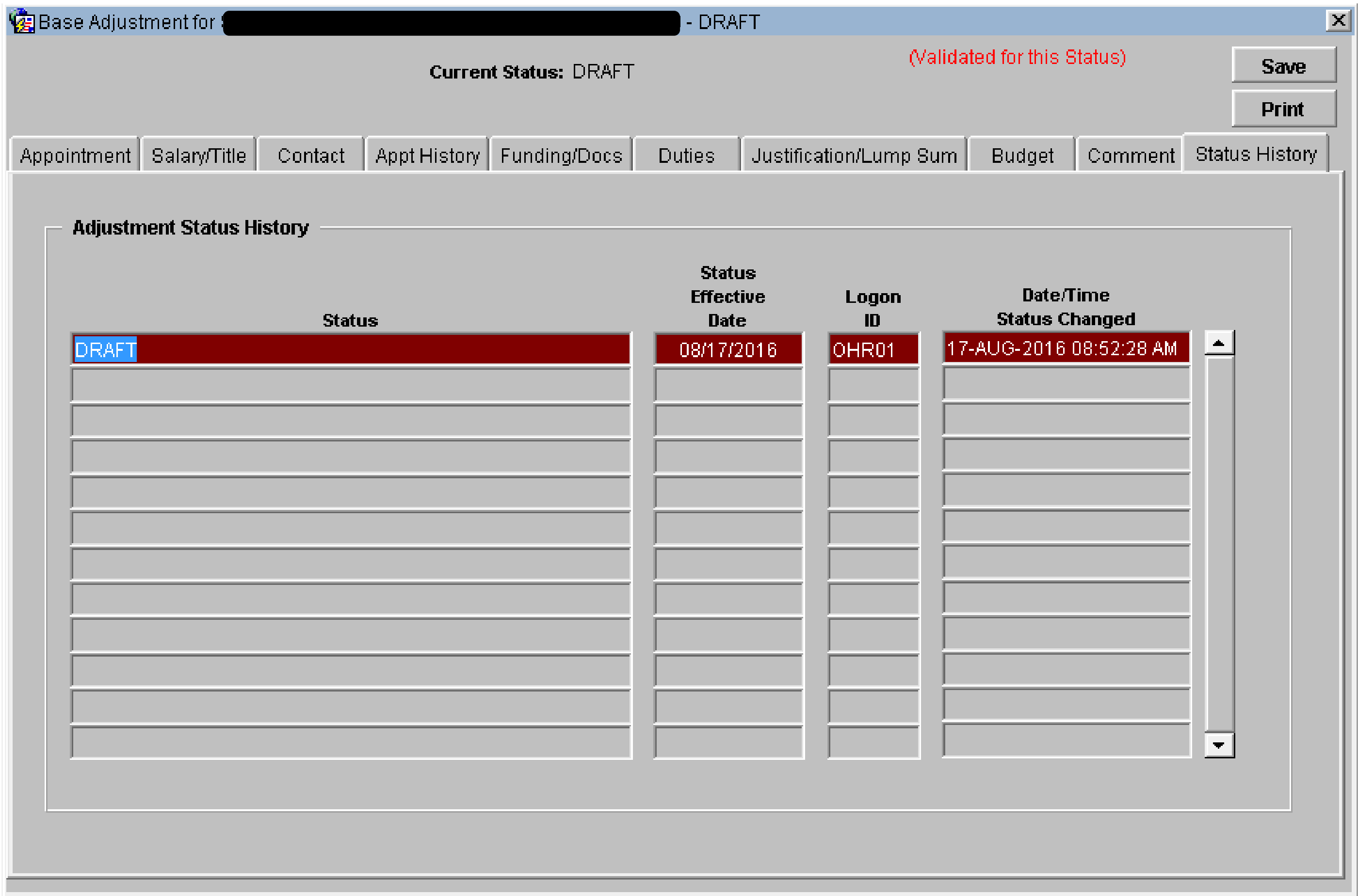
Comment Tab



- This tab is for comments associated with the Adjustment. Only the creator or OHR staff may update or delete a comment entered here.
- System generated comments are listed on this tab (called Events).
- Existing comments are displayed in order by Created Date with the most recent Comment on top.

Feature	Description
Add Comment	Click the <Add Comment> button. To UPDATE a Comment: Place the cursor on the Comment record you wish to change in the first half of the screen (the background color of the record will be dark red) and press the <Edit/View button>.
Delete	Place the cursor on the Comment record you wish to change in the first half of the screen (the background color of the record will be dark red) and click the <Delete Comment> button.

Status Tab

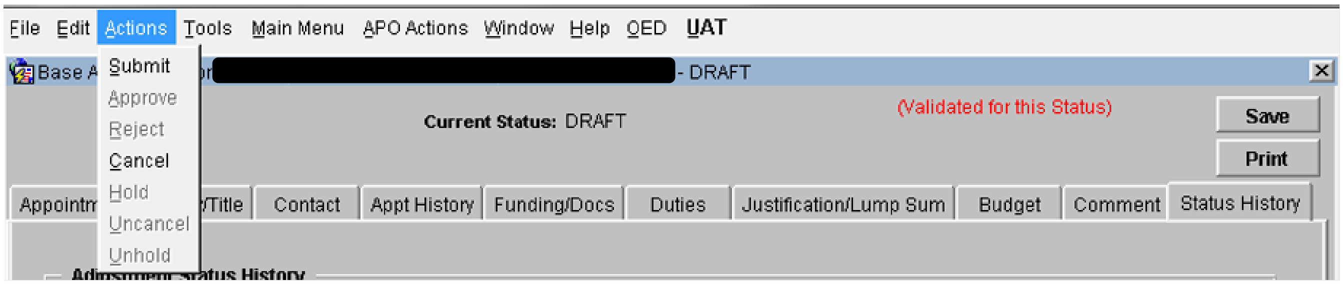


The data on this tab is not modifiable. It displays the history of statuses that a particular Adjustment has had. Anyone with update or view access can view the status history of an Adjustment. The statuses are displayed with the most recent status on the top line by status effective date (MM/DD/YYYY).

List of Statuses:

- Approved & Converted to LI
- Draft
- Entered
- Department Approved
- Division Approved
- Division Entered into HRS
- Division Hold
- Comp Approved
- Comp Hold
- Finished – Entered in HRS
- Revised
- Cancelled

Actions Menu



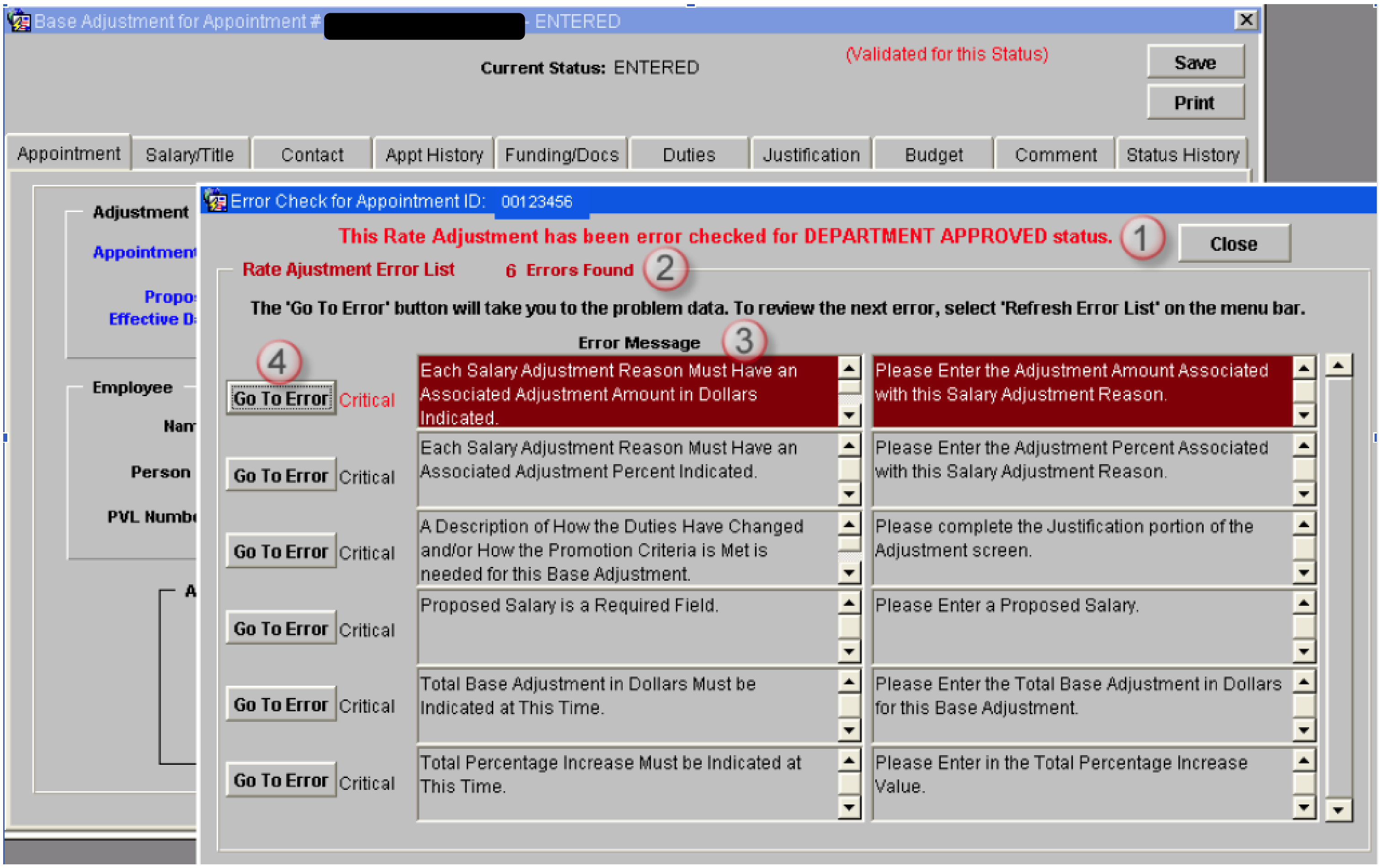
Use the ACTIONS portion of the menu to modify the Status of the Rate and Title Adjustment.

Action	Description
Submit	Used to move the R/T Adjustment from Draft to Entered status.
Approve	Used to move the R/T Adjustment from Entered to Department Approved status. Also used to move the R/T Adjustment from Department Approved to Division Approved status (program checks to see the current status to determine which of the 2 statues is appropriate).
Reject	Used to move the R/T Adjustment to a prior status (e.g., from Dept. Approved to Entered).
Cancel	Used to Cancel further work on a R/T Adjustment.
Hold	Used to temporarily suspend work on the R/T Adjustment.
Uncancel	Used to place the R/T Adjustment in the status it had just prior to the Cancellation so that work on the R/T Adjustment may resume.
Unhold	Used to remove the Hold on the R/T Adjustment so that work on it may resume.

When an Action is selected the PVL data is checked for completeness and integrity. If no errors exist, a “successful” message appears indicating the status has been changed. Note that the “Current Status “display is modified to reflect the new status.

Note that the Department may not modify the R/T Adjustment after the R/T Adjustment is Department Approved (which effectively forwards it to the Division for further approval) and the Division cannot modify the R/T Adjustment after it is Division Approved and submitted to OHR for further review.

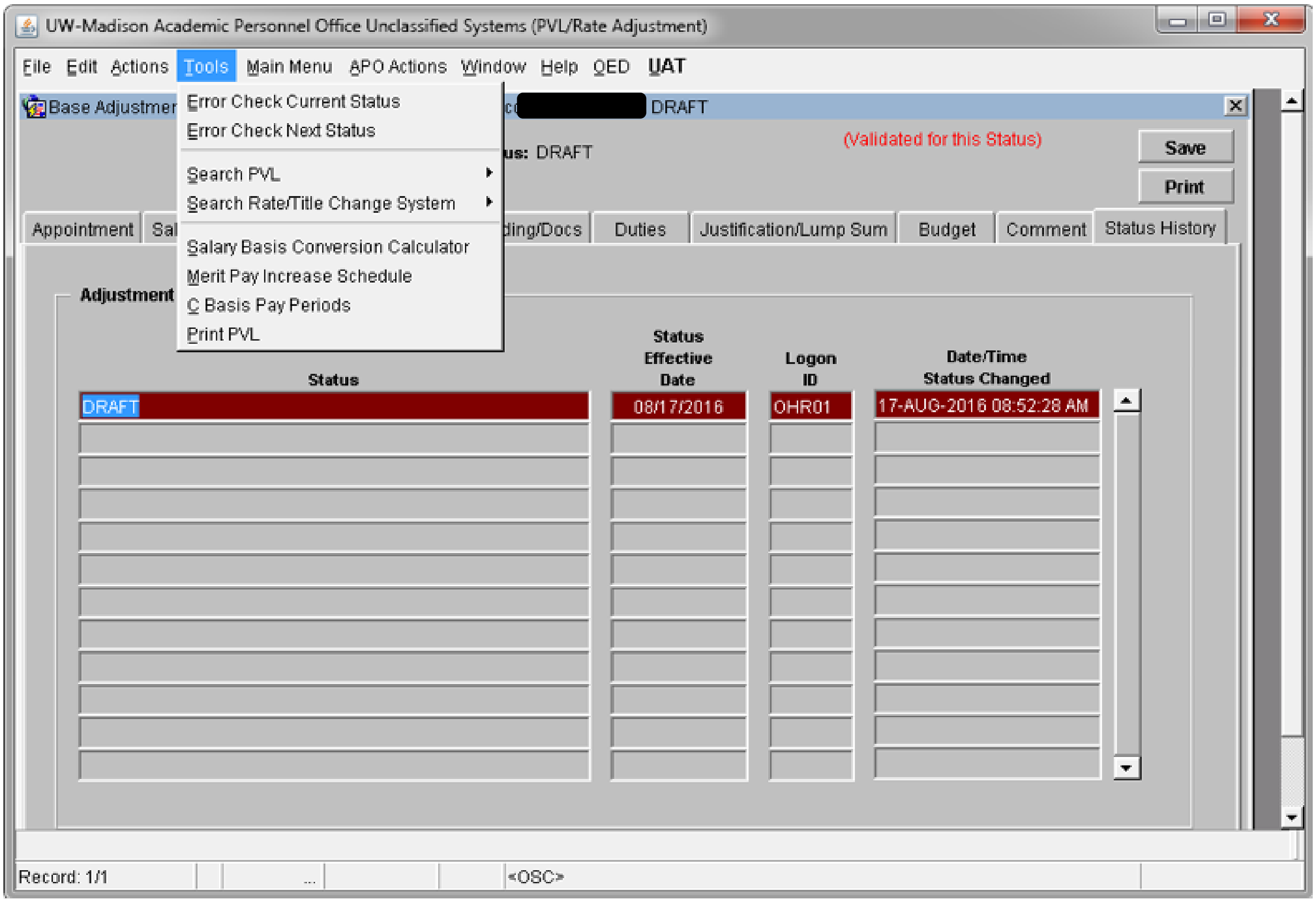
Error(s) Window



If errors were found when you attempted to change the R/T Adjustment status, an Error window will display with:

1. The status for which the R/T Adjustment was validated.
2. The number of Errors.
3. The Error Message and, adjacent to it, the Actions needed to remediate the error.
4. A <Go To Error> button that will take you to the field needed to correct the error.

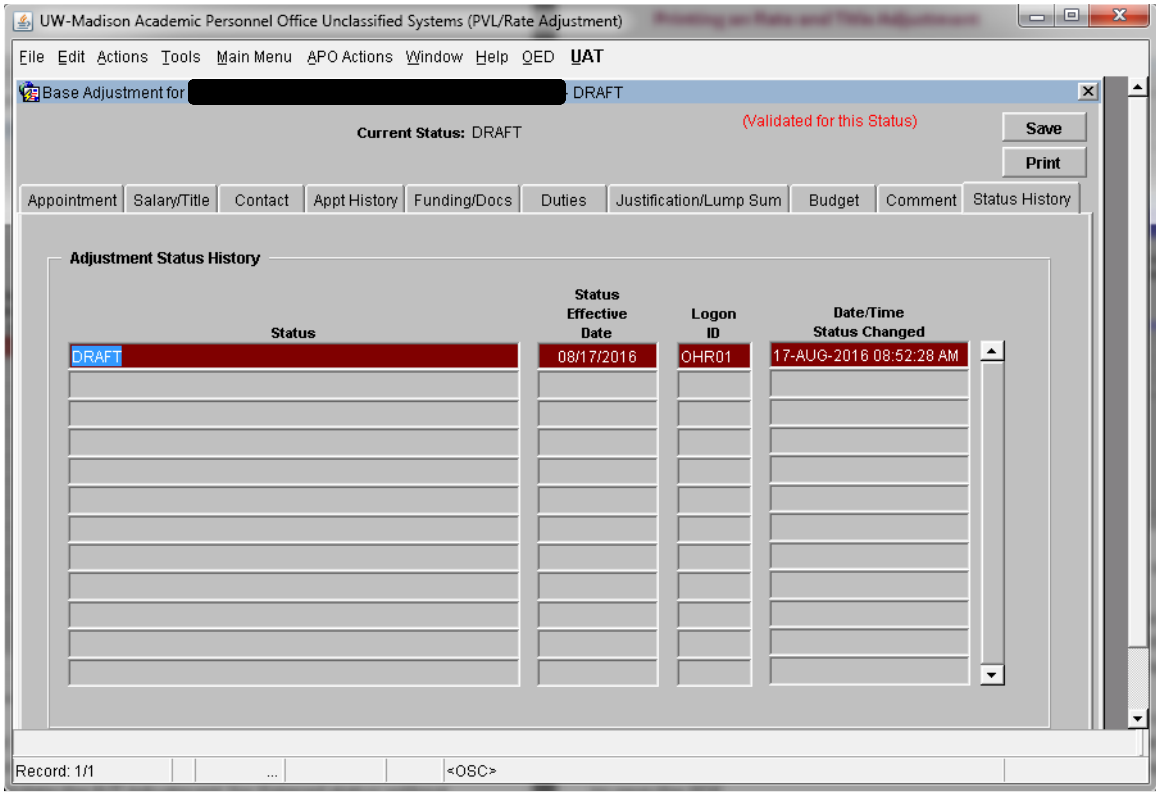
Tools Menu



If you wish to check the R/T Adjustment for errors without having to change the status of the R/T Adjustment, use the TOOLS Menu. From the TOOLS menu you can check for Errors at the Current Status or for the next status that would advance the PVL, e.g., from Draft status, you can validate the R/T Adjustment for Entered status without changing the R/T Adjustment status to Entered.

Note that, if you are in Edit mode, the R/T Adjustment is validated for whatever the current status may be when you close out the record. On closing out the R/T Adjustment, if you get a list of errors which are “Critical” or “Informational”, you may still exit the R/T Adjustment without correcting the data. However, the errors must be corrected if you wish to move the R/T Adjustment to the next level.

Printing a Rate and Title Adjustment



ADOBE ACROBAT READER installation is needed to be able to print a R/T Adjustment.

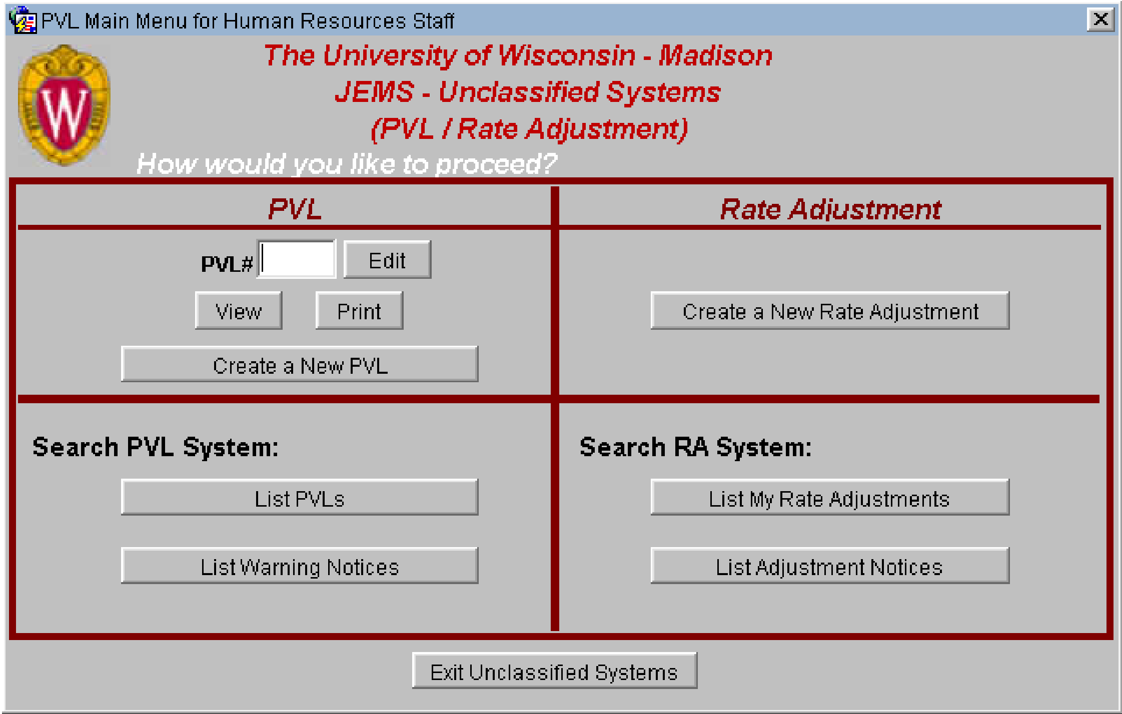
The <Print> button in the upper right corner can be used to access the Print R/T Adjustment screen. The Print R/T Adjustment screen may also be accessed from the File pull down menu and the Main Menu screen. On the Print R/T Adjustment screen, select which report you wish to print and then press the <Print/Preview Report> button.

You must have your browser set to accept Pop-ups from this site in order to print. After pressing the <Print/Preview Report> button, the system launches Adobe Acrobat and the report appears in a separate window. From this window, you may then send the report to your local printer, if a hard copy is needed, or you can choose to save the PDF.

Only one R/T Adjustment may be printed at a time. If you want to print more than one PVL, you may change the PVL number on the Print Screen to print a different PVL.
Available reports:

- Administrative – Includes funding, prior incumbent's name/appointment ID, if waiver, name and reason for the waiver, comments for the PVL, etc.
- Public – The Released PVL for Open recruitment (the data as it would appear on the Web listing).
- Person Hired – Only available after the PVL has been filled and only available to the users with the hiring department authorization for the PVL. This report adds a cover sheet to the Administrative report with details on the person hired for the recruitment.

Searching the R/T System



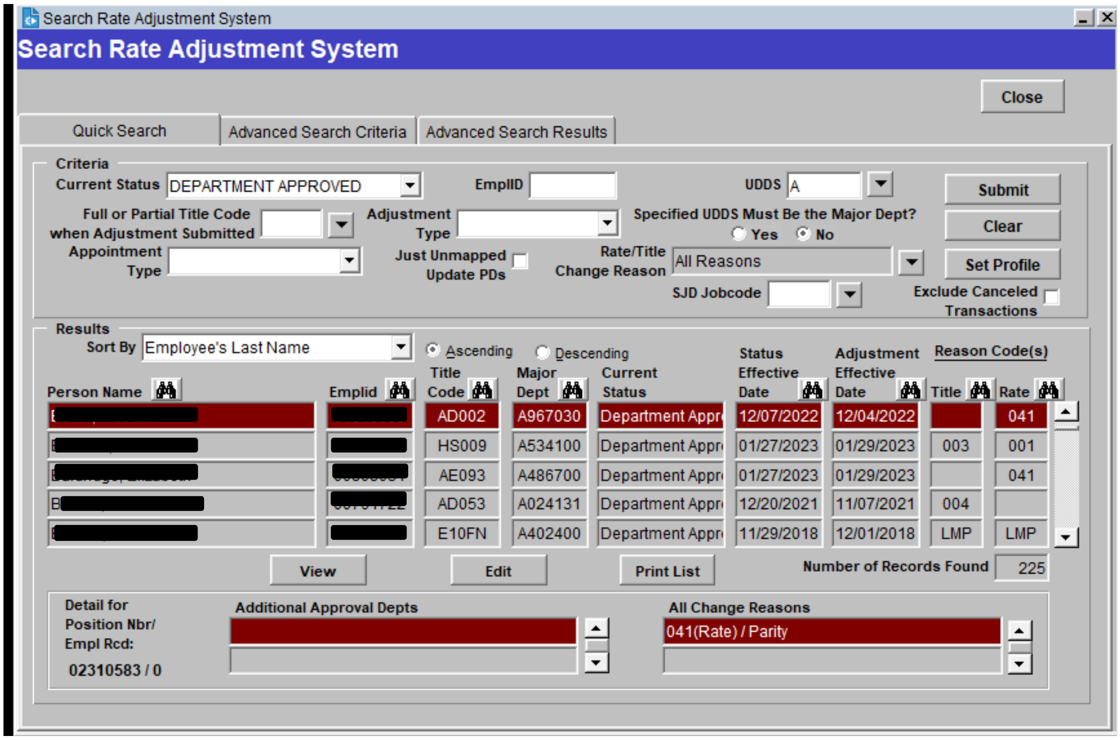
Feature	Description
List my Rate Adjustments	Displays a list of R/T Adjustments based on the criteria entered.
List Adjustment Notices	Displays a list of notices sent out for the selected time period.

The first time you log into the Rate/Title Change system you are given a default Search profile. The default search profile is composed of your UDDS authorization (or one of your UDDS authorizations, if you have more than one) and a ‘Current Status’ of ‘Draft’.

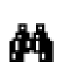
Your Search Profile is loaded into the Search Rate Adjustment Quick Search Criteria when you invoke the screen. If there are Adjustments in the system at the time for your UDDS and in Draft status, you will see them listed in the Results in the second portion of the screen. If there are no records in that status and UDDS, you will receive the message that ‘No Records Were Found’.

In order to change my profile, I will press the <Set Profile> button after clicking on <List My Rate Adjustments> button and create a profile that is more suited to my needs. Once a new profile is created it will not take effect until you exit the system and log back in.

Searching cont'd



The Query Selection screen is used to create individualized queries not restricted by UDDS authorization.

Field	Description
UDDS	Enter a full or partial UDDS code(s). This field may not be left blank.
Current Status	Search for a specific current status as of the today's date.
Appointment Type	Enter in appointment type or leave blank to search all appointment types.
Title Code	Specify a full or partial title code (e.g. AD or AD053). The search will be performed on the Title the employee had at the time the adjustment was initiated.
Major Department	Yes = Select all Adjustments where the specified UDDS is the Major Department. No = Select all Adjustments where the specified UDDS is the Appointment Department.
Rate or Title Change Reason	Select a Change Reason code from the drop down list if you prefer to narrow the list with to Adjustments linked to a given Change Reason. The default search is for Adjustments regardless of the Rate or Title change reason(s) assigned to the Adjustment.
Submit	Action: - Press the <SUBMIT > button to get Results from your modified Criteria.
	Use the buttons with the binoculars to quickly navigate to a specific record in the Results. For example, if the list is large, one can press the binocular button above the list of Names and you will get a list of all the names in the Results. When you select a person on the drop-down list, the program will then place you on the line with that person's data.
View	Use the <View> button to navigate to the Adjustment in View mode.
Edit	Use the <Edit> button to navigate to the Adjustment in Edit mode.
Print List	Use the <Print List> button to bring up a screen that will allow you to create either a hard copy or an Excel Spreadsheet of the Results (Excel program is required in order to generate Spreadsheet).