Chapter 11

Mass Change

Chapter Topics

`TPM Mass Change Processes`

`Overview`

The TPM Mass Change Process covers several distinct Title and Position Management activities that are done on a large scale: Seasonal Reactivation, Temporary Position Reactivation, Temporary Position Extensions (CCX10 Process), Location Change, Transfer of Function, Line Item Realignment, and Compensation Adjustment.

The process is divided into several phases utilizing PeopleSoft workflow and a component developed specifically for NYSTEP. The process captures the appropriate records for each agency; directs that information from the Department of Civil Service (DCS) to each agency for action; directs the information from the Agency to DOB; directs the information from DOB to update the NYSTEP database tables. Mass Change Processes are displayed as a separate TPM menu items but are managed by the users in much the same manner.

The Mass Change Process begins with the initiation of an agency roster. In some instances, the rosters are initiated by Civil Service; in others, agencies can initiate the rosters themselves; agencies can initiate a Mass Change using separate Initiate menu items for a Transfer of Function, Line Item Realignment, Location Change, and the new Compensation Adjustment mass change. For all other Mass Change transactions, DCS initiates the rosters.

Once the rosters are available, workflow routes the Mass Change to the appropriate agency users for action. Upon agency completion, the transactions are routed to DOB for final review and action.

NOTE: The upgrade to NYSTEP PeopleSoft 8.3 has not changed the workflow to the previously identified NYSTEP Users for Mass Change transactions. **Remember**, Agencies 00640, 07950, 11340, 55020, 55090, and 55095 don't go to DOB for final approval.

NOTE: Although mass changes are routed only to the designated or requesting person, other agency users authorized to enter TPM transactions may access and work a mass change by selecting NY Title and Position Mgmt, TPM Mass Change, Use, the type of Mass Change, and using the Find an Existing Value search to access the Mass Change.

NOTE: The time limits for both the agency and DOB to complete work on Mass Change transactions (for all types except the Location change and Comp Adjustment) remain unchanged from previous NYSTEP versions, and are highlighted in the appropriate sections of this chapter.
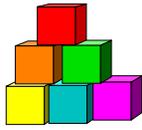
Organizing the Roster

All Mass Change processes have the Sort, Quick Query, and Find functionality to help the User organize the data. These features allow the User to organize the Roster and work a specific item or group of items.

Sort Feature

The **Sort** feature (on the **Detail** page for Seasonal Reactivations, Temporary Reactivations and CCX10's) will allow the User to organize the roster by selecting specific fields. There are two Sort options for Mass Change Transactions. If the transaction has two pages (tabs), a Line Range and a Detail page, the Line Range page will provide the opportunity to sort the roster by a single field; i.e. Item or Location, or Title Code, etc. If there is a Detail page, additional Sorts are provided on that page:

1. In the **Field 1** field, click the ▼ and select the first field that you want the items to be organized by on the roster.

2. In the **Field 2** field, click the ▼ and select the second field that you want the items to be organized by on the roster.

3. In the **Field 3** field, click the ▼ and select the third field that you want the items to be organized by on the roster.

> **NOTE:** After each value in a field is entered, the grid will sort in the order selected. The grid headings do not change to the selected order, but the data will be organized in the selected order.

> **NOTE:** To return to the original roster, in the **Sort Field 1** field, select **Line No**.

In cases where there is only one page (no tabs) i.e. Location Change transaction, the page will default with three Sort field options.

Quick Query Feature

Similar to the **Sort** feature described above, the location of the Quick Query feature varies depending on the type of Mass Change transaction. If the transaction has two pages (tabs), a Line Range and a Detail page, the **Quick Query** feature will appear on the **Detail** page and allows the User to organize the roster by a number of different fields.

1. Enter data in any of the available fields.

2. Press the **Filter** button.
   The system will filter the grid to only those items selected in the query.

NOTE: To return to the original roster, press the **Refresh** button.

Find Feature

The **Find** feature helps the user locate specific items on the roster. For example, if a user is looking for a specific title, click the **Find** hyperlink and in the search dialog box enter the title and press **OK**. The system will bring you to the first occurrence in the roster. Note: the data must be entered the way the data appears in the roster. Partial searches are accepted.
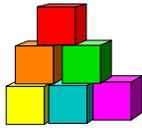
Seasonal Reactivation

Use to reactivate seasonal positions on an annual basis.

DCS Generates Data and Routes to Agency

A separate list of positions is generated by DCS for three types of processes: Seasonal Reactivation (S), Temporary Position Reactivation (T), or CCX10 - Temporary Position Extensions (X). As part of the file generation process a time limit, or sunset date, is set for each subsequent phase (action by the agency and DOB). This time limit varies by process type. DCS then routes the file(s) using workflow to the agency. The initial workflow to the agency is processed daily.

Agency Reviews and Revises Data (Routes to DOB)

TPM users assigned by their agency to administer the Mass Change Process must access their Worklist to determine if action is necessary. It is important to note that there are time limits to which each of the appropriate users must adhere in order to successfully complete the transaction. In the case of a Seasonal Reactivation, each entity has approximately 10 business days to complete the action and move the transaction to the next entity. In the event that action by the preceding entity is completed in a more compressed timeframe, (i.e. Agency takes only 2 days) the remaining time is added to the next entity's time allotment. When the transaction is generated by DCS, a date stamp is placed on each phase of the process. If the agency fails to review the transaction and manually approve the roster thereby routing it to DOB, NYSTEP will do so on the sunset date for the Agency phase of the process. If the assigned user has reviewed the file and marked select positions for deletion, those actions will be retained. If no deletions have been noted, all positions on the roster will be forwarded as generated.

Access the Page

1.   Click the Worklist icon and select the Seasonal Reactivation transaction.
     The Seasonal Reactivation pages display

Line Range Page

Detail Page

NOTE: Field descriptions for the Seasonal Reactivation pages are found at the end of this section.

TIP! Use the horizontal scroll bar at the bottom to display the additional columns and the vertical scroll bar at the right to move through the roster. Each scroll bar represents the full length/width of the document. If you want to move quickly to the bottom or middle, just drag the button and

the roster will display the new location. You can also use the quick keys on your keyboard (Home, End, Page Up, Page Down and the arrows).

Work with the Page

To work a Seasonal Reactivation transaction, you must access the **Detail** page. In this case the **Line Range** page provides a summary of all the roster positions and only allows a single field sort. It will not enable any other action to the roster.

> **NOTE:**   As with all types of Mass Change, you can use the **Sort**, **Quick Query**, or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

- To delete a single item from the roster, click the **AGY Del** check box.

- To delete all items, click the **Mark All** check box and then the **AGY Del** check box of any item in the roster. All of the **AGY Del** check boxes will now be checked.

- To delete several items, you may click the **AGY Del** check box of each item, or click the **Mark** check box next to the items to be deleted, and then click the **AGY Del** check box for any of those items. The **AGY Del** check box for the remaining items to be deleted will now be checked.

- To undelete an item, remove the check mark from the **Mark** and **AGY Del** check boxes by clicking on them.

> **WARNING:** Remember, deletions will apply to all items that have a check in the **Mark** check box. Be sure to uncheck the **Mark** check box and the **Del** check box for any item you wish to retain on the roster.

Press the **Approve** button when you are ready to Submit the transaction.

> **NOTE:**   The Transaction is now forwarded to DOB for review and action. Upon DOB completion of review and action, the NYSTEP database is updated.
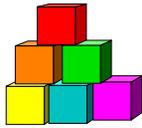
Line Range page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the position on the Mass Change roster.

Field	Description
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Select All/Deselect All	When pressed, selects (or deselects) all of the items for the same action to be taken. Always gray for Seasonal Reactivations and Temporary Reactivations.
Approve	When pressed, approves the Mass Change request and routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays fields available for sorting the line range grid by.
Agy Del Cnt	The number of positions the Agency deleted.
DOB Del Cnt	The number of positions DOB deleted.
C&C Del Cnt	The number of positions C&C deleted.
Begin Line	The beginning line number in a range of similar positions.
End Line	The ending line number in a range of similar positions.
Orig Pos Cnt	The original number of positions before any action was taken.
New Pos Cnt	The new number of positions after an action has been taken.
Title Code	The title code(s) of the position(s).
Title	The title(s) of the position(s).
SG	The Salary Grade(s) of the position(s).
NU	The Negotiating Unit(s) of the position(s).
JC	The Jurisdictional Classification(s) of the position(s).
Location	The location(s) of the position(s).
Cost Center	The cost center(s) of the position(s).
Fund	The fund of the position(s).
Sub Fund	The sub fund of the position(s).
Agency	The name of the agency staff person saving or approving the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless the transaction was previously approved by C&C.

Detail page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the positions on the Mass Change.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Mark All?	When pressed, selects all of the items in the grid for the same action to be taken.
Total Marked	Count of the items selected for a specific action to be taken.
Approved Roster/Original Roster	Toggles between the roster submitted to DOB and the original roster.
Approve	When pressed, Approves the transaction and sends it to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays On/Off. Based on whether the sort option is active or not.
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to filter the roster by specific criteria.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filtering.
End Line	The ending line number of the range of positions for filtering.
Title Code	The title code of the position(s) for filtering.
JC	The Jurisdictional Classification of the position(s) for filtering.
Loc	The location of the position(s) for filtering.
Pool	The Pool ID of the position(s) for filtering.
Filter	When pressed, filters the grid to show only the filtered items.
Refresh	Refreshes the grid to the original items before filtering.

Field	Description
Mark	When the check box is checked, the item is selected to be worked in a group.
Agy Del	When checked, the Agency has selected the item to be deleted.
DOB Del	When checked, DOB has selected the item to be deleted.
Line No	The Line number of the position(s).
Pos Est	The last date that the position was reactivated.
Pos Exp Dt	The date the position will expire.
Title Code	The title code of the position.
Title	The title of the position.
JC	The Jurisdictional Classification of the position.
Loc	The location code of the position.
Loc Descr	The location of the position.
Pool	The pool ID of the position.
Agency	The name of the agency staff taking an action on the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless the transaction was previously approved by C&C.

Temporary Reactivation

Use to reactivate temporary positions on an annual basis.

DCS Generates Data and Routes to Agency

A separate list of positions is generated by DCS for three types of processes: Seasonal Reactivation (S), Temporary Position Reactivation (T), or CCX10 - Temporary Position Extensions (X). As part of the file generation process a time limit, or sunset date, is set for each subsequent phase (action by the agency and DOB). This time limit varies by process type. DCS then routes the file(s) using workflow to the agency. The workflow is processed daily.

Agency Reviews and Revises Data (Routes to DOB)

TPM users assigned by their agency to administer the Mass Change Process must access their Worklist to determine if action is necessary. It is important to note that there are time limits to which each of the appropriate users must adhere in order to successfully complete the transaction. In the case of a Temporary Reactivation, each entity has approximately 10 business days to complete the action and move the transaction to the next entity. In the event that action by the preceding entity is completed in a more compressed timeframe, (i.e. Agency takes only 2 days) the remaining time is added to the next entity's time allotment. When the transaction is generated by DCS, a date stamp is placed on each phase of the process. If the agency fails to review the transaction and manually approve the roster thereby routing it to DOB, NYSTEP will do so on the sunset date for the Agency phase of the process. If the assigned user has reviewed the file and marked select positions for deletion, those actions will be retained. If no deletions have been noted, all positions on the roster will be forwarded as generated.

Access the Page

1.   Click the ⊞ Worklist icon and select the Temporary Reactivation transaction.
     A Temporary Reactivation pages display

Line Range Page

Detail Page

NOTE: Field descriptions for the Temporary Reactivation pages are found at the end of this section.

TIP! Use the horizontal scroll bar at the bottom to display the additional columns and the vertical scroll bar at the right to move through the roster. Each scroll bar represents the full length/width of the document. If you want to move quickly to the bottom or middle, just drag the button and

the roster will display the new location. You can also use the quick keys on your keyboard (Home, End, Page Up, Page Down and the arrows).

Work with the Page

To work a Temporary Reactivation transaction, you must access the **Detail** page. In this case the **Line Range** page provides a summary of all the roster positions and only allows a single field sort. It will not enable any other action to the roster.

> **NOTE:** As with all types of Mass Change, you can use the **Sort**, **Quick Query**, or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

- To delete a single item from the roster, click the **AGY Del** check box.

- To delete all items, click the **Mark All** check box and then the **AGY Del** check box of any item in the roster. All of the **AGY Del** check boxes will now be checked.

- To delete several items, you may click the **AGY Del** check box of each item, or click the **Mark** check box next to the items to be deleted, and then click the **AGY Del** check box for any of those items. The **AGY Del** check box for the remaining items to be deleted will now be checked.

- To undelete an item, remove the check mark from the **Mark** and **AGY Del** check boxes by clicking on them.

> **WARNING:** Remember, deletions will apply to all items that have a check in the **Mark** check box. Be sure to uncheck the **Mark** check box and the **Del** check box for any item you wish to retain on the roster.

Press the **Approve** button when you are ready to Submit the transaction.

> **NOTE:** The Transaction is now forwarded to DOB for review and action. Upon DOB completion of review and action, the NYSTEP database is updated.
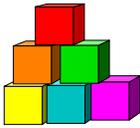
Line Range page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the positions on the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Select All/Deselect All	When pressed, selects (or deselects) all of the items for the same action to be taken. Gray for Temporary Reactivations and Seasonals.
Approve	When pressed, approves the Mass Change request, and routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays fields available for sorting the line range grid by.
Agy Del Cnt	The number of positions the Agency deleted.
DOB Del Cnt	The number of positions DOB deleted.
C&C Del Cnt	The number of positions C&C deleted.
Begin Line	The beginning line number in a range of similar positions.
End Line	The ending line number in a range of similar positions.
Orig Pos Cnt	The original number of positions before any action was taken.
New Pos Cnt	The new number of positions after an action has been taken.
Title Code	The title code of the position(s).
Title	The title of the position(s).
SG	The Salary Grade of the position(s).
NU	The Negotiating Unit of the position(s).
JC	The Jurisdictional Classification of the position(s).
Location	The location of the position(s).
Cost Center	The cost center of the position.
Fund	The fund of the position.
Sub Fund	The sub fund of the position.
Agency	The name of the agency staff taking an action on the transaction. Appears when Save or Approve is pressed.

Field	Description
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless the transaction was previously approved by C&C.

Detail page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Mark All?	When pressed, selects all of the items in the grid for the same action to be taken.
Total Marked	Count of the items selected for a specific action to be taken.
Approved Roster/Original Roster	Toggles between the roster submitted to Budget and the original roster.
Approve	When pressed, Approves the transaction and sends it to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays On/Off. Based on whether the sort option is active or not.
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to filter the roster by specific criteria.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filter.

Field	Description
End Line	The ending line number of the range of positions for filter.
Title Code	The title code of the position for filter.
JC	The Jurisdictional Classification of the position for filter.
Loc	The location of the position for filter.
Pool	The Pool ID of the position for filter.
Filter	When pressed, filters the grid to show only the selected filter items.
Refresh	Refreshes the grid to the original items before filtering.
Mark	When the check box is checked, the item is selected to be worked in a group.
Agy Del	When checked, the Agency has selected the item to be deleted.
DOB Del	When checked, DOB has selected the item to be deleted.
Line No	The Line number of the position.
Pos Est	The date the position was established.
New Pos Exp	The new date the position was established.
Title Code	The title code of the position.
Title	The title of the position.
JC	The Jurisdictional Classification of the position.
Loc	The location code of the position.
Loc Descr	The location of the position.
Pool	The pool ID of the position.
Agency	The name of the agency staff taking action on the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless the transaction was previously approved by C&C.

CCX10 Temporary Extension

DCS Generates Data and Routes to Agency

A separate list of positions is generated by DCS for three types of processes: Seasonal Reactivation (S), Temporary Position Reactivation (T), or CCX10 - Temporary Position Extensions (X). As part of the file generation process a time limit, or sunset date, is set for each subsequent phase (action by the agency, and DOB). This time limit varies by process type. DCS then routes the file(s) using workflow to the agency. The initial workflow to the agency is processed daily.

Agency Reviews and Revises Data (Routes to DOB)

TPM users assigned by their agency to administer the Mass Change Process must access their Worklist to determine if action is necessary. It is important to note that there are time limits to which each of the appropriate users must adhere in order to successfully complete the transaction. In the case of a CCX10, each entity has approximately 10 business days to complete the action and move the transaction to the next entity. In the event that action by the preceding entity is completed in a more compressed timeframe, (i.e. Agency takes only 2 days) the remaining time is added to the next entity's time allotment. When the transaction is generated by DCS, a date stamp is placed on each phase of the process. If the agency fails to review the transaction and manually approve the roster thereby routing it to DOB, NYSTEP will do so on the sunset date for the Agency phase of the process. If the assigned user has reviewed the file and marked select positions for deletion, those actions will be retained. If no deletions have been noted, all positions on the roster will be forwarded as generated.

Access the Page

1.   Click the Worklist icon and select the CCX10 Temp Extension transaction.
       A CCX10 Temp Extension pages display

Line Range Page

Detail Page

NOTE: Field descriptions for the CCX10 pages are found at the end of this section.

TIP! Use horizontal scroll bar at the bottom to display the additional columns and the vertical scroll bar at the right to move through the roster. Each scroll bar represents the full length/width of the document. If you want to move quickly to the bottom or middle, just drag the button and

the roster will display the new location. You can also use the quick keys on your keyboard (Home, End, Page Up, Page Down and the arrows).

Work with the Page

NOTE: As with all types of Mass Change, you can use the **Sort**, **Quick Query**, or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

NOTE: The **Mark** check box, on the Line Range page, is used to speed up processing for a group of positions. If you want a group of positions to have the same Exp Date Increments, check the **Mark** check boxes next to the item range.

           If you want to select different Exp Date Increments for different items, do not select the **Mark** check box.

1. To change the Exp Date Increment on the Line Range page, click the **Mark** check box next to the item(s).

2. In the **Exp Date Increment** field, click the ▼ and select the amount of time of the extension.

3. In the **Comments** field, enter any appropriate comments (Comments are not required).

4. If there are no deletions required, press **Approve**.

NOTE: The **Mark** check box, on the **Detail** page, is used to speed up processing for a group of positions. If you want a group of positions to be deleted, check the **Mark** check boxes next to the items.

● To delete a single item from the roster, click the **AGY Del** check box.

● To delete all items, click the **Mark All** check box and then the **AGY Del** check box of any item in the roster. All of the **AGY Del** check boxes will now be checked.

● To delete several items, you may click the **AGY Del** check box of each item, or click the **Mark** check box next to the items to be deleted, and then click the **AGY Del** check box for any of those items. The **AGY Del** check box for the remaining items to be deleted will now be checked.

● To undelete an item, remove the check mark from the **Mark** and **AGY Del** check boxes by clicking on them.

5. In the **Comments** field, enter any appropriate comments (Comments are not required).

WARNING: Remember, any data or deletion entered for an item that has the **Mark** check box checked, will be carried to all other items with the **Mark** check box checked. Be sure to uncheck the **Mark** check box and change the data or deletion for these items that should have different information.

6. Press the **Approve** button.

NOTE: The Transaction is now forwarded to DOB for review and action. Upon DOB completion of review and action, the NYSTEP database is updated.

Line Range page Field Descriptions

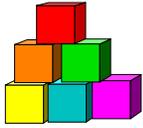| Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Select All/Deselect All	When pressed, selects (or deselects) all of the items for the same action to be taken.
Approve	When pressed, approves the Mass Change request. And routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	When ↓ clicked, displays fields available for sorting the line range grid.
Mark	When the check box is checked, the item is selected to be worked.
Agy Del Cnt	The number of positions the Agency deleted.
DOB Del Cnt	The number of positions DOB deleted.
C&C Del Cnt	The number of positions C&C deleted.
Begin Line	The beginning line number in a range of similar positions.
End Line	The ending line number in a range of similar positions.

Field	Description
Orig Pos Cnt	The original number of positions before any action was taken.
New Pos Cnt	The new number of positions after an action has been taken.
Exp Date Increment	The increment of the position can be extended by 3 months, 6 months, or 1 Year.
Exp Date	The date the position expires if reactivated.
Title Code	The title code of the position(s).
Title	The title of the position(s).
SG	The Salary Grade of the position(s).
NU	The Negotiating Unit of the position(s).
JC	The Jurisdictional Classification of the position(s).
Location	The location of the position(s).
Cost Center	The cost center of the position.
Fund	The fund of the position.
Sub Fund	The sub fund of the position.
Comments	Can be updated with comments. After approval, an 'A' before a comment indicates Agency comment, and a 'B' indicates Budget comments.
Agency	The name of the agency staff taking action on the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless the transaction was previously approved by C&C.

Detail page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.

Field	Description
Mark All?	When pressed, selects all of the items in the grid for the same action to be taken.
Total Marked	Count of the items selected for a specific action to be taken.
Delete	When pressed, deletes the selected items.
Approved Roster/Original Roster	Toggles between the roster submitted to Budget and the Original roster.
Approve	When pressed, Approves the transaction and sends it to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays On/Off. Based on whether the sort option is active or not.
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to filter the roster by specific criteria.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filter.
End Line	The ending line number of the range of positions for filter.
Title Code	The title code of the position for filter.
JC	The Jurisdictional Classification of the position for filter.
Loc	The location of the position for filter.
Pool	The Pool ID of the position for filter.
Filter	When pressed, filters the grid to show only the selected filter items.
Refresh	Refreshes the grid to the original of items before filtering.
Mark	When the check box is checked, the item is selected to be worked in a group.
DOB Del	When checked, the item will be deleted by DOB.
Line No	The Line number of the position.
Old Exp Dt	The old expiration date.

Field	Description
Pos Exp Dt	The date the position expires.
Title Code	The title code of the position.
Title	The title of the position.
JC	The Jurisdictional Classification of the position.
Loc	The location code of the position.
Loc Descr	The location of the position.
Pool	The pool ID of the position.
Agency	The name of the agency staff taking action on the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless the transaction was previously approved by C&C.

Transfer of Function

Use to transfer a position, or group of positions, from one agency to another.

Initiating a Transfer of Function

Access the Page

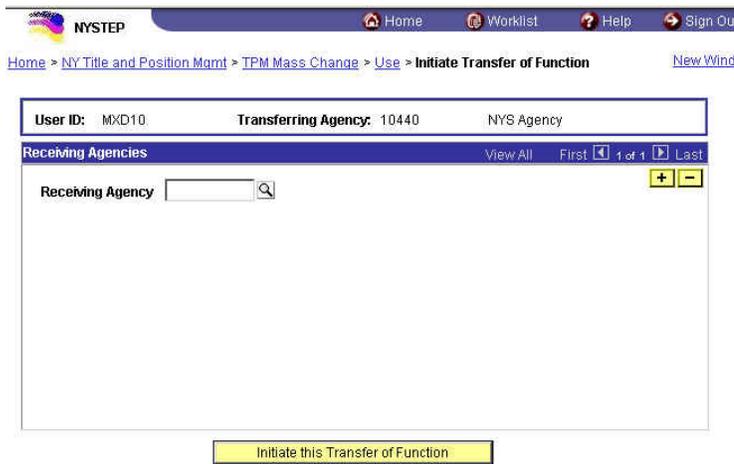**1.**   Click **NY Title and Position Mgmt**, **TPM Mass Change**, **Use**, **Initiate Transfer of Function**.

NOTE: The User ID, Mass Change Type, and Start Date fields will be pre-populated.

2.   In the **Agency** field, enter the agency code and press **Add**.

3. In the **Receiving Agency** field, enter the receiving agency code, or press the 🔍 to look up the code. You will notice that for this transaction only, the lookup returns a list of all state agencies to allow movement of positions between appointing authorities.

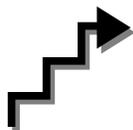4. Press the **Initiate this Transfer of Function** pushbutton.

NOTE: The Transfer of Function will appear on the Worklist of the User who is initiating the Transfer of Function the next business day.

Working a Transfer of Function

NOTE: Field descriptions for the Transfer of Function pages are found at the end of this section.

Work with the Page

Initiating Agency:

1. Click the 🖹 Worklist icon and select the Transfer of Function transaction.
The Transfer of Function page will display.

NOTE: As with all types of Mass Change, you can use the **Sort**, **Quick Query**, or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

2. Click in the **Mark** check box of the items that you want to appear on the transfer of function roster. These items will be transferred to the Receiving Agency for further action once the **Approve** button is pressed.

3. If you are certain you have identified all of the appropriate items, press the **Approve** button.

NOTE: Before pressing **Approve**, if you have marked an item in error, simply uncheck the item by clicking in the **Mark** box again.

4. To view the complete agency roster, press the **Original Roster** button. To view only those items selected for movement to the Receiving Agency, press the **Selected Roster**.

Work with the Page

Receiving Agency:

1. Click the [Worklist] icon and select the Transfer of Function transaction. *The Transfer of Function page displays.*
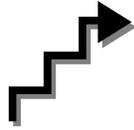

NOTE: As with all types of Mass Change, you can use the **Sort, Quick Query,** or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

2. In the **New Line** field, enter the new line item number.

3. In the **New Loc** field, enter the new location code; or click the 🔍 and select the location code of the new agency. You are not, however, required to make changes to the location on this transaction.

4.   In the **New Pool** field, enter the new Pool ID; or click the 🔍 and select the line item number. You are not, however, required to make changes to the Pool ID on this transaction.

NOTE: If you are assigning a new Pool ID that did not previously exist in the NYSTEP System, you will not be allowed to enter that Pool ID and the following error will appear:

WARNING: Remember, any changes you make in the **New Line**, **New Loc**, and **New Pool** fields, will be made to all of the checked items. Remember to uncheck each item after you have made a change, unless you want the same changes for all checked items.

5.   If you are certain that the Line, Location, and Pool ID information is correct, press the **Approve** button.

NOTE: The Transaction is now forwarded to DOB for review and action. Upon DOB completion of review and action, the NYSTEP database is updated.

Transfer of Function Work page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Recv Agency	The agency receiving the position(s).
Mark All?	When checked, all items will be marked to be transferred.
Total Marked	The total number of items marked to be transferred.

Field	Description
Original Roster/Selected Roster	Toggles between the roster sent to the Receiving Agency and the entire roster. The Original Roster is not available to the Receiving Agency.
Approve	When pressed, approves the Mass Change request, and routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Effective Date	The effective date of the transfer.
Sort	Displays On/Off. Based on whether the sort option is active or not.
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to filter the roster by specific criteria.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filter.
End Line	The ending line number of the range of positions for filter.
Title Code	The title code of the position for filter.
JC	The Jurisdictional Classification of the position for filter.
Loc	The location of the position for filter.
Pool	The Pool ID of the position for filter.
Filter	When pressed, filters the grid to show only the filtered items.
Refresh	Refreshes the grid to the original items before filtering.
Mark	When the check box is checked, the item is selected to be worked, in a group.
SSN	The SSN of the person in the position that is being transferred.
Name	The name of the person in the position that is being transferred.
DOB Del	When checked, DOB has denied the transfer of a particular item.
Line No	The line number of the position.

Field	Description
New Line	Displays the new line number of the position. Entered by Receiving Agency.
Final Line	Displays original line numbers and new line numbers.
Title Code	The title code of the position(s).
Title	The title of the position(s).
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Loc	The location of the position(s).
New Loc	The new location of the position.
New Pool	The new Pool ID of the position.
Agency	The name of the agency staff person saving or approving the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless C&C needs to approve the transaction.
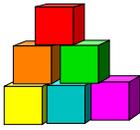
Location Change

Use to change the location of an item from one location to another within the same appointing agency.

> **NOTE:** A minimum of 10 items must be changed in order to use this Mass Change process.

There are two steps necessary to complete the Location Change process: Initiating the Location Change roster, and changing the location code(s) of the selected items.

Initiating a Location Change

Access the Page

1. Click **NY Title and Position Mgmt**, **TPM Mass Change**, **Use**, **Initiate Location Change**.

> **NOTE:** The user ID, Mass Change Type, and Start Date fields are pre-populated.

2. In the **Agency** field, enter the agency code and press **Add**.
   The Initiate this Location Change page will display.
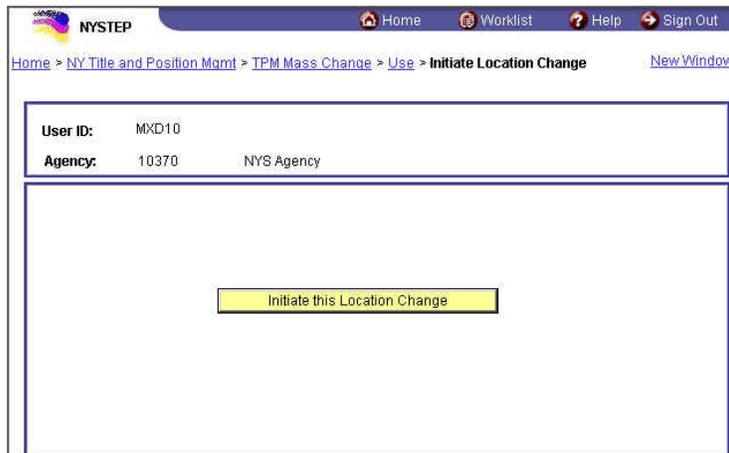
3. Press the **Initiate this Location Change** pushbutton.

NOTE: The Location Change will appear on the Worklist of the User who is initiating the Location Change the next business day.

Working a Location Change

Work with the Page

1. Click the [Worklist] icon and select the Location Change transaction.
   A Location Change page displays

NOTE: Field descriptions for the Location Change pages are found at the end of this section.

NOTE: As with all types of Mass Change, you can use the **Sort, Quick Query,** or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

2. Click the **Mark** check box of the items for which you want to change the location.

3. In the **New Loc** field, enter the new four digit location code for the item, or click [Q] and select the new location code.

WARNING: Remember, any changes you make in the **New Loc** field, will be made to all the checked items. Remember to uncheck each item after you have made a change, unless you want the same changes for all checked items.

4. If you are certain you have completed action on the roster, press the **Approve** button.

Location Change Work page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Mark All?	When checked, all items will be marked to be transferred.
Total Marked	The total number of items marked to be transferred.
Original Roster/Selected Roster	Toggles between original roster and selected location change roster. Enabled after Approval.
Approve	When pressed, approves the Mass Change request, and routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Effective Date	The effective date of the transfer.
Sort	Displays On/Off. Based on whether the sort option is active or not.

Field	Description
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to filter the roster by specific criteria.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filter.
End Line	The ending line number of the range of positions for filter.
Title Code	The title code of the position for filter.
Loc	The location of the position for filter.
New Loc	The new location of the position for filter.
Name	If applicable, the name of the person in the position being moved.
Filter	When pressed, filters the grid to show only the selected line items.
Refresh	Refreshes the grid to the original order of items.
Mark	When the check box is checked, the item is selected to be worked.
SSN	The SSN of the person in the position that is being transferred.
Name	The name of the person in the position that is being transferred.
Line No	The line number of the position.
Title Code	The title code of the position(s).
Title	The title of the position(s).
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Loc	The location of the position(s).
New Loc	The new location of the position.
Agency	The name of the agency staff person saving or approving the transaction. Appears when Save or Approve is pressed.

Field	Description
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless C&C needs to approve the transaction.

Line Item Realignment (LNR)

Use to change multiple line item numbers at one time. The main purpose of this transaction is for the annual line item realignment (LNR) at the beginning of the State Fiscal Year (April 1). The LNR transaction can also be used for line item number realignments of federally funded positions at the beginning of the Federal Fiscal Year (October 1).

> **NOTE:** A minimum of 10 items must be changed in order to use this Mass Change process.

There are two steps necessary to complete the LNR process: Initiating the LNR roster, and reassigning Line Item Numbers to the chosen items.

Initiating a Line Item Realignment

Access the Page

1. Click **NY Title and Position Management**, **TPM Mass Change**, **Use**, **Initiate a Line Item Realignment**.
   A Line Item Realignment Search Dialog Box Displays.

   NYSTEP

   Home > NY Title and Position Mgmt > TPM Mass Change > Use > Initiate Line Item Realignment

   Initiate Line Item Realignment

   Add a New Transaction

   User ID: MXD10
   Mass Change Type: Line Item Change
   Start Date: 10/01/2003
   Agency:

   Add

> **NOTE:** The user ID, Mass Change Type, and Start Date fields are pre-populated.

2.   In the **Agency** field, enter the agency code and press **Add**.
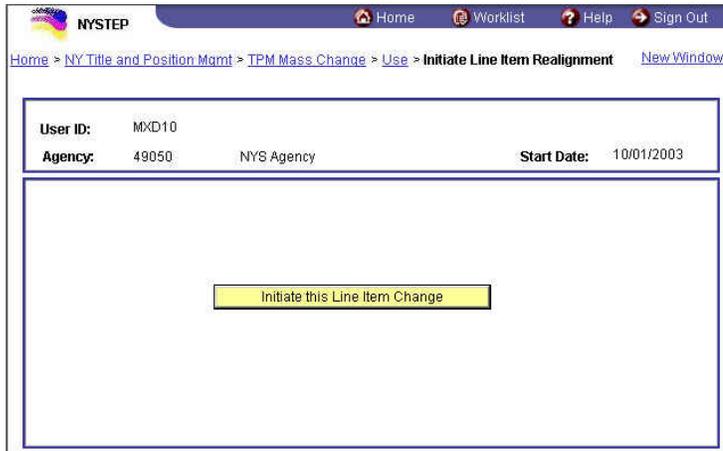
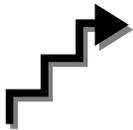
3.   Press the **Initiate this Line Item Realignment** pushbutton.

NOTE: The Line Item Change will appear on the Worklist of the User who is
initiating the Line Item Change the next business day.

Working a Line Item Realignment

Work with the Page

1.   Click the Worklist icon and select the Line Item Realignment transaction.
A Line Item Realignment page displays

NOTE: Field descriptions for the Line Item Realignment pages are found at the end of this section.

NOTE: As with all types of Mass Change, you can use the **Sort, Quick Query**, or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

2. Click the **Mark** check box of the items for which you want to change the line item number.

3. In the **New Line** field, enter the new line item number. Once you have chosen the items to be changed by marking them, you may change just the first line item number and TAB. Upon pressing TAB, the page will refresh and all the items that were marked will be sequentially numbered for you.

NOTE: If you decide to change a line item number in the middle of a new sequence, uncheck the **Mark** check box, delete the item number and re-enter the corrected item number.

4.   If you are changing the Pool IDs, in the **New Pool** field, enter the new Pool ID; or click the 🔍 and select the Pool ID. You are not, however, required to make changes to the Pool ID on this transaction.

NOTE: If you are assigning a new Pool ID that did not previously exist in the NYSTEP System, you will not be allowed to enter that Pool ID and the following error will appear:

```
Microsoft Internet Explorer                                            [x]

   ⚠️     Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)

          The value entered in the field does not match one of the allowable values.  You can see
          the allowable values by pressing the Prompt button or hyperlink.

                                    [   OK   ]
```

WARNING: Remember any changes you make in the **New Line** and **New Pool** fields, will be made to all of the checked items. Remember to uncheck the each item after you have made a change, unless you want the same changes for all checked items.

5.   If you are certain all changes are accurate, press the **Approve** button.

NOTE: The Transaction is now forwarded to DOB for review and action. Upon DOB completion of review and action, the NYSTEP database is updated.

NOTE: Changes made through the Mass Change Line Item Realignment will not be reflected in PayServ. Agencies must make the changes separately in PayServ. Contact your liaison in the Office of the State Comptroller for information on processing those changes.

Line Item Realignment Work page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.

Field	Description
Mark All?	When checked, all items will be marked to be transferred.
Total Marked	The total number of items marked to be transferred.
Original Roster/Selected Roster	Toggles between original rosters and selected rosters.
Approve	When pressed, approves the Mass Change request, and routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays On/Off. Based on whether the sort option is active or not.
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to sort the roster.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filter.
End Line	The ending line number of the range of positions for filter.
Title Code	The title code of the position for filter.
Loc	The location of the position for filter.
Prog	The program code of the position for filter.
Fund	The fund code of the position for filter.
Name	The name of the employee occupying the position.
Filter	When pressed, filters the grid to show only the selected line items.
Refresh	Refreshes the grid to the original items in the grid.
Mark	When the check box is checked, the item is selected to be worked.
Name	The name of the person in the position that is being transferred.
DOB Del	When checked, DOB will delete the item.
Line No	The original line number.
New Line	Open field to enter the new line number.

Field	Description
Final Line	Displays the new line or if not assigned the original line number.
Title Code	The title code of the position(s).
Title	The title of the position(s).
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Loc	The location of the position(s).
Pool	The Pool ID of the position.
New Pool	Open field to enter the new Pool ID info.
Prog	The program code of the position(s).
New Prog	Based on the new Pool ID entered, this displays the new data.
Fund	The fund code of the position.
New Fund	Based on the new Pool ID entered, this displays the new data.
Subfund	The subfund of the position(s).
New Subfund	Based on the new Pool ID entered, this displays the new data.
Position#	The position number of the position.
Agency	The name of the agency staff person saving or approving the transaction. Appears when Save or Approve is pressed,
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless C&C needs to approve the transaction.
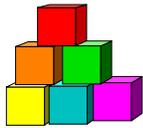
Compensation Adjustment

Use to request changes to at least ten Non-Statutory (NS) Shared positions in NYSTEP

NOTE: A minimum of 10 items must be changed in order to use this Mass Change process.

There are two steps necessary to complete this process: Initiating the Compensation Adjustment roster, and entering the requested Compensation Adjustment.

Initiating a Compensation Adjustment

Access the Page

1. Click **NY Title and Position Management**, **TPM Mass Change**, **Use**, **Initiate a Comp Adjustment**.
   A Comp Adjustment Search Dialog Box Displays

Home > NY Title and Position Mgmt > TPM Mass Change > Use > **Initiate Comp. Adjustment**

Initiate Comp. Adjustment

Add a New Transaction

User ID:	MXD10
Mass Change Type:	Compensation Adjustments
Start Date:	10/01/2003
Agency:	

Add

NOTE: The user ID, Mass Change Type, and Start Date fields are pre-populated.

2. In the **Agency** field, enter the agency code and press **Add**.

3. Press the **Initiate this Comp Adjustment** pushbutton.

> **NOTE:** The Compensation Adjustment will appear on the Worklist of the User who is initiating the Comp Adjustment the next business day.

Working a Comp Adjustment

Work with the Page

1. Click the **Worklist** icon and select the Comp Adjustment transaction.
A Comp Adjustment page displays

New Rsn	Durtn	Title Code	Title	TC Grade	SG	JC	NU	Loc	Position#
NSA	T	2867100	Prj Assnt	NS	NS	0	06	0110	00349946
NSA	T	2867100	Prj Assnt	NS	NS	0	06	0110	00379947
NSA	T	2867100	Prj Assnt	NS	NS	0	06	0110	00379948
NSA	T	2867100	Prj Assnt	NS	NS	0	06	0110	00379949

NOTE: Field descriptions for the Comp Adjustment pages are found at the end of this section.

NOTE: As with all types of Mass Change, you can use the **Sort**, **Quick Query**, or **Find** options to organize your data. Instructions to use these features are found at the beginning of this chapter.

2. Click the **Mark** check box of the items for which you want to make the comp adjustments.

3. To make a Comp Adjustment to a group of items having the same characteristics (i.e. same hourly rate) use the Filter option and click **Mark All**:

   ↓ In the **New Effdt** field, enter the new effective date; or click the 🗓 and select the date.

   ↓ In the **New Rate Freq** field, enter the new rate frequency; or click the ▼ and select the new rate frequency.

   ↓ In the **New Rate** field, enter the new rate of pay.

   ↓ In the **New Rsn** field, enter the reason (NSA for a regular comp adjustment or GSI for a general Salary increase) or click on the ▼ and select the reason.

WARNING: Remember, any changes you make in the **Effdt**, **New Rate Freq**, **New Rate**, or **New Rsn** fields, will be made to all of the checked items. Remember to uncheck each item after you have made a change, unless you want the same changes for all checked items.

4. If you want to make changes to individual items' (must be more than 10 items on a Mass Change) rates, frequencies, etc., enter the new data in the appropriate fields as necessary.

5. If you are certain all the information is accurate, press the **Approve** button.
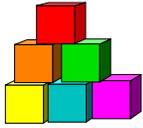
NOTE: After forwarding the Transaction to DOB, upon DOB completion of review and action, the NYSTEP database is updated.

Comp Adjustment Work page Field Descriptions

Field	Description
Agency	The Agency code and name of the agency that has the Mass Change roster.
Type	The type of Mass Change i.e. Seasonal Reactivation, CCX10, etc.
Job Control #	Created by Mass Change batch when the request is initiated and run that night.
Mark All?	When checked, all items will be marked to be transferred.
Total Marked	The total number of items marked to be transferred.
Original Roster/Selected Roster	Toggles between original roster and selected roster.
Approve	When pressed, approves the Mass Change request, and routes the transaction to DOB.
XLS File	Creates an XLS spreadsheet of whatever rows are visible in the grid page.
Sort	Displays On/Off. Based on whether the sort option is active or not.
Sort: Field 1	The first field that you want the items on the roster to be organized by.
Field 2	The second field that you want the items on the roster to be organized by.
Field 3	The third field that you want the items on the roster to be organized by.
Query	Displays On/Off. Based on whether the Query option is active or not.
Quick Query	Allows the User to filter the roster by specific criteria.
Mark	When the check box is checked, the grid is filtered to only the rows containing checkmarks in the 'Mark' field.
Begin Line	The beginning line number of the range of positions for filter.
End Line	The ending line number of the range of positions for filter.
Title Code	The title code of the position.

Field	Description
JC	The jurisdictional classification of the position(s).
Loc	The location of the position(s).
Dur Cd	The duration code of the position(s).
Rate Freq	The rate frequency of the position(s).
SG	The salary grade of the position(s).
NU	The negotiating unit of the position(s).
Effdt	The effective date or the most recent action on the position at the time the transaction was created.
Filter	When pressed, filters the grid to show only the selected line items.
Refresh	Refreshes the grid to the original order of items.
Mark	When the check box is checked, the item is selected to be worked in a group.
AGY Deny	When checked, the agency is denying the comp adjustment.
DOB Deny	When checked, DOB is denying the comp adjustment.
Line No	The line item of the position.
Effdt	The maximum effective date of the position on Position Summary.
Rsn	The Action/Reason displaying on Position Summary.
Rate Freq	The current rate frequency of the position.
Rate	The current rate of the position.
New Effdt	Open field to enter an effective date of the request.
New Rate Freq	Open field to enter the rate frequency of the request.
New Rate	Open field to enter the new rate for the request.
New Rsn	Open field to enter the new Action/Reason for the request. Default is NSA.
Durtn	The Duration code of the position.
Title Code	The title code of the position(s).
Title	The title of the position(s).
TC Grade	The Grade of the title code according to the Title and Salary Plan.
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Loc	The location of the position(s).

Field	Description
Position#	The position number of the position.
Agency	The name of the agency staff person saving or approving the transaction. Appears when Save or Approve is pressed.
Division of Budget	The name of the DOB Examiner making the determination. Appears after Save or Approve is pressed.
C&C	Appears as N/A unless C&C needs to approve the transaction.

Find an Existing Transaction

The simplest and most straightforward way to access a transaction is to go into the request page directly through the menu items and entering the applicable data.

NOTE: While the outline below retrieves a Transfer of Function Mass Change transaction, the steps are the same for almost all processes.

Access the Page

1. Click **NY Title and Position Mgmt**, **TPM Mass Change**, **Use**, **Transfer of Function**.
    A Search Dialog Box will display

    Home > NY Title and Position Mgmt > TPM Mass Change > Use > **Transfer of Function**

    Transfer of Function

    Find an Existing Transaction

    Job Control Number: [   ]
    Agency: [   ]
    Receiving Agency: [   ]
    [Search] [Clear] Basic Search

2. Enter as much data as necessary to pull up the transaction and press **Search**.

    The search can be as broad or as narrow as necessary. Using the **Job Control Number** field will take the user directly to the requested page. A search can be conducted by entering criteria singly (e.g., **Agency**) or in combination (i.e. **Agency** and **Action Code**). The more information the tracking system has by which to define the search, the more focused the results.

    Different fields may appear in the search dialog box, depending on the type of transaction being retrieved.