Chapter

# Earmarks

## Chapter Topics

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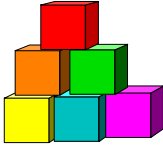
# Initiating Earmark Action Requests

Use the Earmark page to request the release of an earmark or a Fill & Continue on a position or group of positions.  The same transaction can be used to request action on all earmarks against a position or agency-specific class of positions.  NYSTEP will route the request to the appropriate entity or entities: Classification & Compensation, the Civil Service Commission, and/or the Division of the Budget.

**NOTE:**    Agencies may manage internal earmarks using **Manage Positions**, **Manage Positions**, **Use**, **Position Data**.  See the Agency User Manual for Details.

## Access the Page

1.    Click **NY Title and Position Mgmt**, **TPM Maintenance, Use**, **Earmarks (CC-5)**. Then click on <u>Add a New Transaction</u>.

### Earmarks Page Field Descriptions

| | |
|---|---|
| **Agency** | The Agency Code and name that has the position(s). |
| **Job Control #** | System generated number that will display upon saving or submitting. |
| **Div Bur/Inst** | The Division, Bureau or Institution within the agency. |
| **+** | Add sign to add a sequence: there can be up to 99 sequences on one job control number. |
| **−** | Minus sign to delete an unwanted sequence. If pressed, NYSTEP will ask for confirmation to delete the sequence being viewed. |
| **Proposed Eff Date** | The requested effective date of the transaction. |
| **Sequence #** | If there is more than one sequence to the request, sequence # will be indicated, e.g. .02. |
| **Line #** | The line item number(s) of the positions(s) on which the action is being taken. |

| | |
|---|---|
| **Incumb** | The individual currently in the position. |
| **SSN** | The social security number of the individual in the position. |
| **Title** | The Title Code of the position. |
| **SG** | The Salary Grade of the position. |
| **JC** | The Jurisdictional Classification of the position. |
| **NU** | The Negotiating Unit of the position. |
| **Position #** | The 8-digit number assigned to the position when it is established. |
| **Location** | The Location code and geographic description of the position. |
| **Pool ID** | The Pool ID of the position. |
| **Position Earmarks** | Shows current earmark values. |
| **C&C Date** | Date of the most recent earmark action by C&C on the position(s). |
| **C&C Status** | Status of most recent earmark action by C&C on the position(s). |
| **DOB Date** | Date of the most recent earmark action by DOB on the position(s). |
| **DOB Status** | Status of the most recent earmark action by DOB on the position(s). |
| **CSC Date** | Date of the most recent earmark action by CSC on the position(s). |
| **CSC Status** | Status of the most recent earmark action by CSC on the position(s). |
| **Requested Changes** | The area in which a new earmark action is requested. |
| **C&C** | The field in which a C&C earmark action is requested |
| **Status** | The status of the requested action. |
| **DOB** | The field in which a DOB earmark action is requested. |
| **Status** | The status of the requested action. |
| **CSC** | The field in which a CSC earmark action is requested. |
| **Status** | The status of the requested action. |
| **Req Dt.** | The date the request was made. |
| **Requestor** | The person initiating the transaction. |

### *Earmarks Documents Page Field Descriptions*

| Field | Description |
|---|---|
| **Tracking #** | System generated number that will display upon saving or submitting. |
| **Doc Type** | Code for type of document being attached; i.e. ACL, ADD, etc. |
| **Description** | Type of document being attached, i.e. Agency Cover Letter, Agency Duties Description, etc. |
| **+ Add New Doc** | Inserts blank rows for additional documents to be added. |
| **− Delete** | When clicked, selects document to be deleted and brings up an inquiry whether you want to delete or cancel the deletion. Inactivated upon submission to NYSTEP. |
| **File Name** | The name of the file that is being attached. |
| **Action Date** | The date the documents were attached. This field will remain blank until the request has been submitted. |
| **View Documents** | Button that allows the documents that have been attached to be viewed. |
| **Submit** | Button that will submit the entire package to the next approval level, as applicable. |

Home > NY Title and Position Mgmt > TPM Maintenance > Use > **Earmarks (CC-5)**        New Window

Request \ Documents \ Determination \ Fund Info \ Comments \

**Agency:**                                          **Job Control #:**   NEW

**Documents**                                 View All      First ◄ 1 of 1 ► Last

**Doc Types:**   **Description:**          **Attached File/Applies to:**      **Action Date:**

ACL 🔍   Agency Justification                                                    + −

Add   Delete   View   [                                    ]

*Earmark Agency Document Types*

ACL Agency Justification

ADD Duties Description

AOC Organizational Chart

## Earmarks Determination Page

This page will display empty until action is taken on the request(s).



### Earmarks Determinations Field Descriptions

| Field | Description |
|---|---|
| Agency | The Agency Code and name that has the position(s). |
| Job Control # | System generated number that will display upon saving or submitting. |

| Field | Description |
|---|---|
| **Eff Date** | The approved effective of the action taken in the box in which it shows. |
| **Prop C&C or DOB or CSC** | The requested action. |
| **Status** | The status of the requested action. |
| **Analyst** | The name of the Classification and Pay Analyst or other authorized C&C agent issuing the determination. |
| **Examiner** | The name of the Budget Examiner or other authorized DOB agent issuing the determination. |
| **Approver** | The name of the Commission Staff member issuing the determination on behalf of the Civil Service Commission. |
| **Appr C&C, DOB, or CSC** | The action actually approved by the relevant entity.  Note: this action may not be the same as the requested action. |
| **Status Date** | The date the determination was submitted, thereby the date the status changed. |

### *Earmarks Fund Info Page*

| Field | Description |
|---|---|
| **Agency** | The Agency Code and name that has the position(s). |
| **Job Control #** | System generated number that will display upon saving or submitting. |
| **Div Bur/Inst** | The Division, Bureau or Institution within the agency. |
| **Pool ID** | The Pool ID of the position. |
| **Program** | If the earmark action is on a position, this field is displayed and grayed. |
| **Fund** | If the earmark action is on a position, this field is displayed and grayed. |
| **Subfund** | If the earmark action is on a position, this field is displayed and grayed. |
| **Fund Type** | If the value entered in the Pool ID is currently active, this field is displayed and grayed. |

| Field | Description |
|-------|-------------|
| **Fund Percent** | 100% if one person is in the position, 50% if two people are in the position working part-time. |
| **Split Fund** | If Fund Percent is 50%, the Split Fund checkbox will be marked. |

*Earmarks Comments Page Field Description*

| Field | Description |
|-------|-------------|
| **Agency** | The Agency Code and name that has the position(s). |
| **Job Control #** | System generated number that will display upon saving or submitting. |
| **Request Level Comments** | Free form field that allows users to enter comments for the entire Job Control number.  The field will allow up to 254 characters. |
| **Sequence Level Comments** | Free form field that allows users to enter comments related to the Job Seq number.  The field will allow up to 8000 characters. |
| **Div Bur/Inst** | The Division, Bureau or Institution within the agency. |
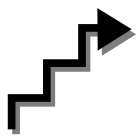
# Work with the Page

1. In the **Agency** field, enter the agency code or click the 🔍, highlight the appropriate agency code and double click to select.

2. In the **Div Bur/Inst** field, enter the Div Bur/Inst.

3. In the **Effective Date** field, enter the effective date.

4. In the **Line #** field, enter the line number of the position for which the earmark action is being requested, **or,**

5. In the **Title** field, enter the title code of the class of positions for which the earmark action is being requested.

**NOTE:**    Enter Line Number or Title, not both.

6.   In the **Requested Changes** area, select the appropriate change box.  Click the ![dropdown], highlight the desired earmark action and double click to select.  The code may also be manually entered.

**NOTE:**    Action may be requested on all earmarks against the position or the title on the **same request**.  NYSTEP will route the request to all relevant entities.  They can act independently of each other.

7.   Click the **Documents** page tab. You must attach at least one document to submit the request. (see instructions in the Documents section of this manual).

8.   Click the **Comments** page tab.  Comments are optional.  In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments**, enter any comments that relate to the individual sequences.

9.   When the request is complete and you are ready, press **Submit.**  NYSTEP will route the request as appropriate.