

## **TPM 4R Long Forms**

### **Chapter Topics**

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## Using 4R Transactions

The 4R pages are used to reclassify and/or reallocate position(s). 4R and 4N transactions can be submitted in one Request if appropriate.

### **4R – 01**

Use to reclassify to an existing title.

### **4R – 02**

Use to reclassify to a new title.

### **4R – 03**

Use to reallocate a title or class.

### **4R – 04**

Use to request a title structure change to an existing title at the same salary grade.

### **4R – 05**

Use to request a title structure change to a new title at the same salary grade.

### **4R – 06**

Use to request a title structure change to an existing title that has a different allocation.

### **4R – 07**

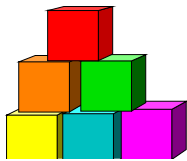
Use to request a title structure change to a new title at a different allocation.

**4R – 41**

Use to reclassify to an existing title and make a change to the line item number(s).

**4R – 42**

Use to reclassify to a new title and make a change to the line item number(s).




## 4R - 01

Use to reclassify a position from one existing title to another existing title.




### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 01 Request Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: 08000 Civil Service <span style="float: right;">Trx Sumry Job Control #: 0304-12909</span>					
<b>Requests</b> <span style="float: right;">View All First 1 of 1 Last</span>					
*Div Bur/Inst: Planning <span style="float: right;">Request Status: Agency Submitted</span>					
*Form CD: 4R *Action CD: 01 *Proposed Eff Date: 10/16/2003					
# POS Req: 1 <span style="float: right;">Location: 0110</span>					
Line # Range: Begin: 15357 End:					
TC: 2600100 Keyboard Spec 1 SG: 06 JC: 0 NU: 06 Pool ID: 010					
Incumbent: VACANT					
Prop. TC: 2600200 Keyboard Spec 2 SG: 09 JC: 0 NU: 02					
Proposed Rate:					
<input checked="" type="radio"/> Hourly <input type="radio"/> Annual <input type="radio"/> NTE <input type="radio"/> SG EQ Location: 0110 Albany					
Req Chgs: NU <input type="checkbox"/> JC <input type="checkbox"/> Min Quas <input type="checkbox"/>					
<b>C/C Assignment</b>					
Section Head: DeSquorl,Rocky Assigned Analyst: LAR99 <span style="float: right;">Route To</span>					
Req Date: 10/16/2003 Requestor: Sunshine,Suzy					
<div>  Save            Return to Search            Add            Update/Display         </div>					
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction or having the position(s).
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date of the reclassification.
<b># Pos Req</b>	The number of positions requested to be reclassified.
<b>Line # Range Begin</b>	The beginning line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Line # Range End</b>	The ending line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Location</b>	The Location code and geographic description of the position(s). If different locations, "9999" will display.
<b>TC</b>	The Title Code and description of the position(s) being reclassified.
<b>SG</b>	Salary Grade of the position(s).
<b>JC</b>	Jurisdictional Classification of the position(s).
<b>NU</b>	Negotiating Unit of the position(s).
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>View Pos</b>	When pressed, a secondary page appears with all line items in the range. Shows the Title description, SG, JC, NU, and location.
<b>Incumbent</b>	The name of the person currently in the position. May also read "Various" or "Vacant".
 <b>(Correction)</b>	When pressed on the request page, opens those data fields that are not available on the determination page for modification.

Field	Description
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. TC</b>	The code and description of the title to which the position(s) are being reclassified.
<b>SG</b>	Proposed Salary Grade for the position(s) being reclassified.
<b>JC</b>	Proposed Jurisdictional Classification for the position(s) being reclassified.
<b>NU</b>	Proposed Negotiating Unit for the position(s) being reclassified.
<b>Location</b>	The requested location and description of the position(s).
<b>Proposed Rate</b>	The proposed rate of the requested position if NS.
<b>Req. Chgs.</b>	NU, JC, Min Quals. If checked, indicates supporting documentation must be attached.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup will remain blank until C&C receives the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction to for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### ***4R – 01 Documents Page Field Descriptions***

See the Documents section of this manual.

**4R – 01 CC/DOB Determination Page Field Descriptions**

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request Documents CC/DOB Determination Fund Info Comments CC Comments

Agency: 08000 Civil Service [Trx Sumry](#) Job Control #: 0304-12909

Requests View All First 1 of 1 Last

Div/Bur/Inst: Planning Request Status: Agency Submitted

Form CD: 4R Action CD: 01

**CC Determination**

Action:  Prop TC / Appr TC: 2600200 Description: Keyboard Spec 2 SG: 09 JC: 0 NU: 02

Keyboard Spec 2

☐ Streamlined?

# Positions

# Positions Req: 1 Approved:  Disapproved:

Determination Dt: Analyst:


**Budget Determination**

Line #(Range) Approved: thru:

# Positions

CC Apprv: 1 Approved:  Disapproved:  Eff Date:

Determination Dt: Examiner:

[Route To](#)  [Submit](#)

[Save](#) [Return to Search](#) [Add](#) [Update/Display](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction or having the position(s).
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.



Field	Description
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>Prop. TC</b>	The Title Code requested by the agency.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The proposed Jurisdictional Classification of the requested title.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>Appr. TC</b>	The code of the approved title. System generated but may be changed.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Rate</b>	The C&C rate of the requested position if NS and streamlined.
<b># Positions Req.</b>	The number of positions requested.
<b>Approved</b>	The number of positions C&C approved.
<b>Disapproved</b>	The number of positions C&C disapproved.
<b>Eff. Date</b>	The date the position becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.

Field	Description
<b>Determination Dt</b>	The date the determination was made by C&C.
<b>Analyst</b>	The C&C Analyst assigned to the transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b>Line # (Range) Approved: thru:</b>	System generated. The line number range of the approved position(s).
<b># Positions</b>	Determination information on the position(s).
<b>C&amp;C Apprv</b>	Number of positions C&C approved.
<b>Approved</b>	Number of positions DOB approved.
<b>Disapproved</b>	Number of positions DOB disapproved.
<b>Eff. Date</b>	The date the reclassification becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 01 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Item Range: to:</b>	The range of line items requested.

Field	Description
<b>Title</b>	Title Code and description.
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.
<b>Funding</b>	The area of the page that displays the funding information.
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>Program</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Subfund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund Type</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

#### ***4R – 01 Comments & CC Comments Pages Field Descriptions***



**NOTE:** Comments are not required for a 4R 01 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.





## Work with the Page



**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

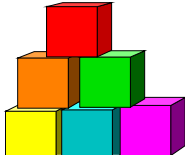
4. In the **Appr. TC** field, accept the default value or click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.
5. In the **SG** field, enter the approved salary grade if different than the default value.
6. In the **JC** field, enter the approved jurisdictional class if different than the default value.
7. In the **NU** field, enter the approved negotiating unit if different than the default value.
8. If a streamlined request, check the **Streamlined?** box.
9. If a streamlined request, in the **Rate** workgroup select the appropriate radio button if different than requested.
10. Enter the dollar value or the equated salary grade.

11. In the # **Positions Approved** field, enter the number of positions C&C is approving if different than the default value.
12. If streamlining, in the **Eff. Date** field, enter the date the reclassification becomes effective (if different than the system generated date).
13. If streamlined and the **Duration** is *T* or *S*, in the **Exp. Date** field, enter the date the position expires (if different than the system generated date).
14. Click the **Documents** page tab.
15. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
16. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
17. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

18. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
19. If this transaction does not need to be routed, click **Submit**.




## 4R - 02

Use to reclassify a new title.




## Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 02 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: 11270 Education <span style="float: right;">Trx Summary Job Control #: 0304-11231</span>					
<b>Requests</b> <span style="float: right;">View All First 1 of 1 Last</span>					
*Div Bur/Inst: Ed Sch Deaf <span style="float: right;">Request Status: Agency Submitted</span>					
*Form CD: 4R *Action CD: 02 *Proposed Eff Date: 07/15/2003					
# POS Req: 1 <span style="float: right;">Location: 3310</span>					
Line # Range: Begin: 00582 End:					
TC: 8016888 Janitor SG: 07 JC: 1 NU: 03 Pool ID: 009					
Incumbent: Wright, Hugh R.					
Prop. Title: Gofer Aide SG: 08 JC: 1 NU: 03					
Proposed Rate: Hourly Annual NTE SG EQ Location: 3310 Rome					
Req Chgs: NU JC Min Quals					
<b>C/C Assignment</b>					
Section Head: DeSquori, Rocky Assigned Analyst: LAR99 <span style="float: right;">Route To</span>					
Req Date: 07/14/2003 Requestor: Wood, Holly					
Save Return to Search Add Update/Display					
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date of the reclassification.
<b># Pos Req</b>	The number of positions requested to be reclassified.
<b>Line # Range Begin</b>	The beginning line number of the position(s) requested. All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Line # Range End</b>	The ending line number of the position(s) requested. All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Location</b>	The Location code and geographic description of the position(s). If different locations, "9999" will display.
<b>TC</b>	The Title Code and description of the position(s) being reclassified.
<b>SG</b>	Salary Grade of the position(s).
<b>JC</b>	Jurisdictional Classification of the position(s).
<b>NU</b>	Negotiating Unit of the position(s).
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>View Pos</b>	When pressed, a secondary page appears with all line items in the range. Shows the Title description, SG, JC, NU, and location.
<b>Incumbent</b>	The name of the person currently in the position. May also read "Various" or "Vacant".
 <b>(Correction)</b>	When pressed on the request page, opens those data fields that are not available on the determination page for modification.

Field	Description
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. Title</b>	The proposed title for the position being reclassified.
<b>SG</b>	Proposed Salary Grade of the position(s) being reclassified.
<b>JC</b>	Proposed Jurisdictional Classification for the positions being reclassified.
<b>NU</b>	Proposed Negotiating Unit of the positions being reclassified.
<b>Location</b>	The requested location of the position(s).
<b>Proposed Rate</b>	The proposed rate of the requested position if NS.
<b>Req. Chgs.</b>	NU, JC, Min Quals. If checked, indicates supporting documentation must be attached.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup will remain blank until C&C receives the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction to for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### ***4R – 02 Documents Page Field Descriptions***

See the Documents section of this manual.



# 4R – 02 CC/DOB Determination Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

Agency: 11270 Education [Trx Sumry](#) Job Control #: 0304-11231

**Requests** View All First 1 of 1 Last

Div/Bur/Inst: Ed Sch Deaf Request Status: Agency Submitted

Form CD: 4R Action CD: 02

**CC Determination**

Action: Approved With Chang Description: Gofer Aide SG: 08 JC: 1 NU: 03

2518200 Gofer Aide 08 0 02

☐ Streamlined?

# Positions

# Positions Req: 1 Approved: 1 Disapproved:

Determination Dt: Analyst:

Eff Date:

**Budget Determination**

Line #(Range) Approved: thru:

# Positions

CC Apprv: 1 Approved: Disapproved:

Determination Dt: Examiner:

Route To Submit

Save Return to Search Add Update/Display

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.

Field	Description
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>(Prop. TC)</b>	The Title Code requested by the agency.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The proposed Jurisdictional Classification.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>(Appr. TC)</b>	The code of the approved title.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Rate</b>	The C&C rate of the requested position if NS.
<b># Positions Req.</b>	The number of positions requested.
<b>Approved</b>	The number of positions C&C approved.
<b>Disapproved</b>	The number of positions C&C disapproved.
<b>Eff. Date</b>	The date the position becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by C&C.

Field	Description
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b>Line # (Range) Approved: thru:</b>	System generated. The line number range of the approved position(s).
<b># Positions</b>	Determination information on the position(s).
<b>C&amp;C Apprv</b>	Number of positions C&C approved.
<b>Approved</b>	Number of positions DOB approved.
<b>Disapproved</b>	Number of positions DOB disapproved.
<b>Eff. Date</b>	The date the reclassification becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 02 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Item Range: to:</b>	The range of line items requested.
<b>(Title)</b>	Title Code and description.

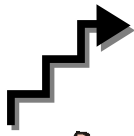
Field	Description
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.
<b>Funding</b>	The area of the page that displays the funding information.
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>Program</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Subfund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund Type</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

#### ***4R – 02 Comments & CC Comments Pages Field Descriptions***



**NOTE:** Comments are not required for a 4R 02 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.





## Work with the Page



**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

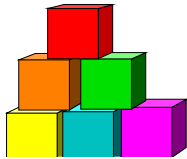
4. In the (**Appr. TC**) field, click the , highlight the appropriate title code (must be a new title) and double click to select. The code may also be manually entered.
5. In the **SG** field, enter the approved salary grade if different than the default value.
6. In the **JC** field, enter the approved jurisdictional class if different than the default value.
7. In the **NU** field, enter the approved negotiating unit if different than the default value.
8. If a streamlined request, check the **Streamlined?** box.
9. If a streamlined request, in the **Rate** workgroup select the appropriate radio button if different than requested.
10. Enter the dollar value or the equated salary grade.
11. In the # **Positions Approved** field, enter the number of positions C&C is approving if different than the default value.

12. If streamlining, in the **Eff. Date** field, enter the date the reclassification becomes effective (if different than the system generated date).
13. If streamlined and the **Duration** is *T* or *S*, in the **Exp. Date** field, enter the date the position expires (if different than the system generated date).
14. Click the **Documents** page tab.
15. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
16. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
17. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

18. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
19. If this transaction does not need to be routed, click **Submit**.




## 4R - 03

Use to reallocate a class of positions.




### Access the Page

1. Click .  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 03 Request Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: <input type="text" value="14020"/> Labor <span style="float: right;"><a href="#">Trx Summary</a> Job Control #: 0304-12067</span>					
<b>Requests</b> <span style="float: right;">View All First 1 of 1 Last</span>					
*Div Bur/Inst: <input type="text" value="Unemployment Insurance"/> Request Status: Agency Submitted					
*Form CD: <input type="text" value="4R"/> *Action CD: <input type="text" value="03"/> *Proposed Eff Date: <input type="text" value="09/11/2003"/>					
# POS Aff: <input type="text" value="65"/>					
Pres TC: <input type="text" value="0204000"/> UI Accts Exmr SG: 13 JC: 0 NU: 02					
Prop. TC: <input type="text" value="0204000"/> UI Accts Exmr SG: <input type="text" value="14"/> JC: <input type="text" value="0"/> NU: <input type="text" value="02"/>					
Req Chgs: NU <input type="checkbox"/>					
<b>C/C Assignment</b>					
Section Head: Betdahowse, Ivanna		Assigned Analyst: Padd, Lily		<a href="#">Route To</a>	
Req Date: 08/29/2003 Requestor: Oyl, Olive					
<div> <input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> </div>					
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction or having the positions.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date for the reallocation.
<b># Pos Aff</b>	The number of positions in the class affected by the reallocation.
<b>Pres. TC</b>	The present Title Code of the position(s) being reallocated.
<b>(Description)</b>	Description of the title to be reallocated.
<b>SG</b>	Salary Grade of the position(s).
<b>JC</b>	Jurisdictional Classification of the position(s).
<b>NU</b>	Negotiating Unit of the position(s).
 <b>(Correction)</b>	When pressed on the request page, opens those data fields that are not available on the determination page for modification.
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. TC</b>	The code and description of the title for which the reallocation is being requested.
<b>SG</b>	Proposed Salary Grade for the class.
<b>JC</b>	The Jurisdictional Classification of the position(s) being reallocated. Cannot be changed.
<b>NU</b>	Proposed Negotiating Unit of the position(s) being reallocated.
<b>Req. Chgs.</b>	NU. If checked, indicates supporting documentation must be attached.



Field	Description
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup remains blank until C&C receives the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction to for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### 4R – 03 Documents Page Field Descriptions

See the Documents section of this manual.

#### 4R – 03 CC/DOB Determination Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 14020 Labor [Tx Summary](#) Job Control #: 0304-12067

**Requests** View All First 1 of 1 Last

Div/Bur/Inst: Unemployment Insurance Request Status: Agency Submitted  
Form CD: 4R Action CD: 03

**CC Determination**

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
<input type="text"/>	0204000	Ui Accts Exmr	14	0	02
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>

☐ Streamlined?

Eff Date:


Determination Dt: Analyst:

**Budget Determination**

# Pos Affected: 65

Eff Date:

Determination Dt: Examiner:

[Route To](#)  [Submit](#)

[Save](#) [Return to Search](#) [Add](#) [Update/Display](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>Prop. TC</b>	The Title Code requested by the agency.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The Jurisdictional Classification of the requested title.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>Appr. TC</b>	The code of the approved title. Input by C&C Analyst.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.

Field	Description
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Eff. Date</b>	The date the reallocation becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by C&C.
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b>Apprv. Rate</b>	DOB approved rate.
<b># Pos Affected</b>	The number of positions in the class affected by the reallocation.
<b>Eff. Date</b>	The date the reallocation becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 03 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.

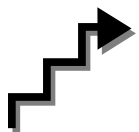
Field	Description
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Title</b>	Title Code and description.
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.
<b>Funding</b>	Not Applicable.

#### ***4R – 03 Comments & CC Comments Pages Field Descriptions***



**NOTE:** Comments are not required for a 4R 03 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.





### **Work with the Page**



**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.



**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.



**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, enter the Title Code. The code must be on the pending table with a new allocation.




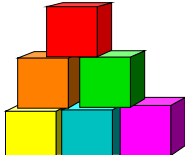
**NOTE:** The Appr. TC must be the same as the Prop TC.

5. If a streamlined request, check the **Streamlined?** box.
6. If streamlining, in the **Eff. Date** field, enter the date the reallocation becomes effective (if different than the system generated date).
7. Click the **Documents** page tab.
8. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
9. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
10. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

11. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
12. If this transaction does not need to be routed, click **Submit**.




## 4R - 04

Use to request a title structure change to an existing title at the same Salary Grade.




### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 04 Request Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > **4R/4R Transactions**

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: <input type="text" value="16000"/> Public Service <a href="#">Trx Summary</a> <b>Job Control #:</b> 0203-14181					
<b>Requests</b> <a href="#">View All</a> <a href="#">First</a> <a href="#">3 of 23</a> <a href="#">Last</a>					
*Div Bur/Inst: <input type="text" value="Electricity &amp; Environment"/> <b>Request Status:</b> Agency Submitted					
*Form CD: <input type="text" value="4R"/> *Action CD: <input type="text" value="04"/> *Proposed Eff Date: <input type="text" value="10/31/2002"/>					
# POS Aff: 8 Pres TC: <input type="text" value="4527400"/> Power Sys Oprtns Sp 4 <b>SG:</b> 27 <b>JC:</b> 0 <b>NU:</b> 05					
Prop. TC: <input type="text" value="4535310"/> Utility Eng 3 <b>SG:</b> 27 <b>JC:</b> 0 <b>NU:</b> 05					
<b>C/C Assignment</b>					
<b>Section Head:</b> Decat,Morris		<b>Assigned Analyst:</b> <input type="text" value="LAR99"/> <a href="#">Search</a>		<a href="#">Route To</a>	
<b>Req Date:</b> 11/04/2002		<b>Requestor:</b> Vater,Elle			
<a href="#">Save</a>		<a href="#">Return to Search</a>		<a href="#">Next in List</a>	
<a href="#">Previous in List</a>		<a href="#">Add</a>		<a href="#">Update/Display</a>	
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date for the title structure change.
<b># Pos Aff</b>	The number of positions in the class affected by the structure change.
<b>Pres. TC</b>	The present Title Code and description being structure changed.
<b>SG</b>	The present Salary Grade of the title.
<b>JC</b>	The present Jurisdictional Classification of the title.
<b>NU</b>	The present Negotiating Unit of the title.
 <b>(Correction)</b>	When pressed, on the request page, opens those data fields that are not available on the determination page for modification.
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. TC</b>	The proposed Title Code and description.
<b>SG</b>	The Salary Grade of the proposed title.
<b>JC</b>	The Jurisdictional Classification of the proposed title.
<b>NU</b>	The Negotiating Unit of the proposed title.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup remains blank until C&C receives the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.

Field	Description
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### 4R – 04 Documents Page Field Descriptions

See the Documents section of this manual.

#### 4R – 04 CC/DOB Determination Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 16000 Public Service [Trx Sumry](#) Job Control #: 0203-14181

**Requests** [View All](#) [First](#) [3 of 23](#) [Last](#)

Div/Bur/Inst: Electricity & Environment **Request Status:** Agency Submitted

Form CD: 4R Action CD: 04

**CC Determination**

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
App. As Requested	4535310	Utility Eng 3	27	0	05
	4535310	Utility Eng 3	27	0	05

☐ Streamlined?

Eff Date:


Determination Dt:  Analyst:

**Budget Determination**

# Pos Affected: 8

Eff Date:

Determination Dt:  Examiner:

[Route To](#)  [Submit](#)

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#) [Add](#) [Update/Display](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.



Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>Prop. TC</b>	The Title Code requested by the agency.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The Jurisdictional Classification of the requested title.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>Appr. TC</b>	The code of the approved title. Input by C&C Analyst.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Eff. Date</b>	The date the reallocation becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.

<b>Determination Dt</b>	The date the determination was made by C&C.
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b>Apprv. Rate</b>	DOB approved rate.
<b># Pos Affected</b>	The number of positions in the title affected by the structure change.
<b>Eff. Date</b>	The date the structure change becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review/ approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review/approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 04 Fund Info Page Field Descriptions***

<b>Field</b>	<b>Description</b>
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Title</b>	Title Code and description.
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.
<b>Funding</b>	Not Applicable

#### 4R – 04 Comments & CC Comments Pages Field Descriptions



**NOTE:** Comments are not required for a 4R 04 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.




### Work with the Page




**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request.

Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.



**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, accept the default value or click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.




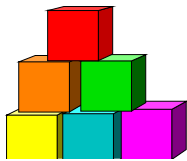
**NOTE:** This transaction requires that the Salary Grade be the same or similar between the original title and the proposed title.

5. If a streamlined request, check the **Streamlined?** box.
6. If streamlining, in the **Eff. Date** field, enter the date the structure change becomes effective (if different than the system generated date).
7. Click the **Documents** page tab.
8. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
9. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
10. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

11. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
12. If this transaction does not need to be routed, click **Submit**.




## 4R - 05

Use to request a title structure change to a new title at the same Salary Grade.




### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 05 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: 00640 Insurance Fund <span style="float: right;">Trx Summary Job Control #: 0001-13920</span>					
<b>Requests</b> <span style="float: right;">View All First 1 of 1 Last</span>					
*Div Bur/Inst: CLAIMS Request Status: Agency Submitted					
*Form CD: 4R *Action CD: 05 *Proposed Eff Date: 07/01/2000					
# POS Aff: 19					
Pres TC: 6811500 Prin Comp Clms Exmr SG: 25 JC: 0 NU: 05					
Prop. Title: CLAIMS SVS REP 3 SG: 25 JC: 0 NU: 05					
Req Chgs: NU <input type="checkbox"/> JC <input type="checkbox"/> Min Quals <input checked="" type="checkbox"/>					
<b>C/C Assignment</b>					
Section Head:		Assigned Analyst: LAR99		Route To	
Req Date: 06/21/2000 Requestor: Cephus,Bo					
<div>  Save            Return to Search            Add            Update/Display         </div>					
Request   Documents   CC/DOB Determination   Fund Info   Comments   CC Comments					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date for the title structure change.
<b># Pos Aff</b>	The number of positions in the class affected by the structure change.
<b>Pres. TC</b>	The present Title Code and description being structure changed.
<b>SG</b>	The present Salary Grade of the title.
<b>JC</b>	The present Jurisdictional Classification of the title.
<b>NU</b>	The present Negotiating Unit of the title.
 <b>(Correction)</b>	When pressed, on the request page, opens those data fields that are not available on the determination page for modification.
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. Title</b>	The description of the title being requested. This is a 50 character alpha-numeric data field.
<b>SG</b>	The Salary Grade of the proposed title.
<b>JC</b>	The Jurisdictional Classification of the proposed title.
<b>NU</b>	The Negotiating Unit of the proposed title.
<b>Req. Chgs.</b>	NU, JC, Min Quals. If checked, indicates supporting documentation must be attached.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup remains blank until C&C receives the transaction.

Field	Description
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### 4R – 05 Documents Page Field Descriptions

See the Documents section in this section.

#### 4R – 05 CC/DOB Determination Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 00640 Insurance Fund Trx Sumry Job Control #: 0001-13920

**Requests** View All First 1 of 1 Last

Div/Bur/Inst: CLAIMS Request Status: Agency Submitted

Form CD: 4R Action CD: 05

**CC Determination**

Action: App. As Requested Description: CLAIMS SVS REP 3 SG: 25 JC: 0 NU: 05

6812300 Claims Svs Rep 3 25 0 05

☒ Streamlined? Eff Date: 07/01/2000

Determination Dt: 06/26/2000 Analyst: Cephus,Bo

**Budget Determination**

# Pos Affected: 19

Eff Date:

Determination Dt: Examiner:

Route To Submit

Save Return to Search Add Update/Display

Request Documents CC/DOB Determination Fund Info Comments CC Comments



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>(Prop. TC)</b>	Will be blank.
<b>Description</b>	The description of the requested Title Code.
<b>SG</b>	Salary Grade of the class.
<b>JC</b>	Proposed Jurisdictional Classification of the class.
<b>NU</b>	Proposed Negotiating Unit of the class.
<b>Disp. Date</b>	Disposal Date (approved only if the Action is "Withdraw" or "Deny").
<b>Appr. TC</b>	The code of approved the title. Input by C&C Analyst.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.



Field	Description
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Eff. Date</b>	The date the reallocation becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by C&C.
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b># Pos Affected</b>	The number of positions in the title affected by the structure change.
<b>Eff. Date</b>	The date the structure change becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	The C&C staff member that you want to route the transaction to for review/approval.
<b>Role User</b>	When pressed, the Analyst can route the request to another Analyst for review/ approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 05 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.

Field	Description
(Title)	Title description.
SG	Salary Grade.
JC	Jurisdictional Classification.
NU	Negotiating Unit.
Funding	Not Applicable

#### ***4R – 05 Comments & CC Comments Pages Field Descriptions***



**NOTE:** Comments are not required for a 4R 05 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.




### **Work with the Page**




**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.

2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.



**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, click the , highlight the appropriate title code (must be a new title) and double click to select. The code may also be manually entered.
5. If a streamlined request, check the **Streamlined?** box.
6. If streamlining, in the **Eff. Date** field, enter the date the structure change becomes effective (if different than the system generated date).




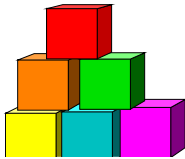
**NOTE:** This transaction requires that the Salary Grade be the same or similar between the original title and the proposed title

7. Click the **Documents** page tab.
8. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
9. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the **CC Comments** page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
10. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

11. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
12. If this transaction does not need to be routed, click **Submit**.



## 4R - 06

Use to request a title structure change to an existing title that has a different allocation.




### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 06 Request Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > **4N/4R Transactions**

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: <input type="text" value="01060"/> State Police <a href="#">Trx Summary</a> <b>Job Control #:</b> 0304-10532					
<b>Requests</b> <a href="#">View All</a> <a href="#">First</a> <a href="#">3 of 3</a> <a href="#">Last</a>					
*Div Bur/Inst: <input type="text" value="Admin"/> <b>Request Status:</b> Agency Submitted					
*Form CD: <input type="text" value="4R"/> *Action CD: <input type="text" value="06"/> *Proposed Eff Date: <input type="text" value="06/15/2003"/>					
# POS Aff: <input type="text" value="1"/>					
Pres TC: <input type="text" value="7332100"/> State Pol Mcrwv Cmc S <b>SG:</b> 18 <b>JC:</b> 1 <b>NU:</b> 05					
Prop. TC: <input type="text" value="1464200"/> Agency Trng&Dv S 2 <b>SG:</b> 23 <b>JC:</b> 0 <b>NU:</b> 05					
<b>C/C Assignment</b>					
<b>Section Head:</b> DeSquori,Rocky		<b>Assigned Analyst:</b> <input type="text" value="LAR99"/>		<a href="#">Route To</a>	
<b>Req Date:</b> 06/05/2003 <b>Requestor:</b> Errup,Phil					
<a href="#">Save</a> <a href="#">Return to Search</a> <a href="#">Next in List</a> <a href="#">Previous in List</a> <a href="#">Add</a> <a href="#">Update/Display</a>					
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Initiated, DOB Disapproved.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date for the title structure change.
<b># Pos Aff</b>	The number of positions in the class affected by the structure change.
<b>Pres. TC</b>	The present Title Code and description being structure changed.
<b>SG</b>	The present Salary Grade of the title.
<b>JC</b>	The present Jurisdictional Classification of the title.
<b>NU</b>	The present Negotiating Unit of the title.
 <b>(Correction)</b>	When pressed, on the request page, opens those data fields that are not available on the determination page for modification.
<b>Audit</b>	This pushbutton appears if C&C has made a change to values on the requested transaction. When this button is pressed, the original transaction values appear.
<b>Prop TC</b>	The proposed title code and description.
<b>SG</b>	The Salary Grade of the proposed title.
<b>JC</b>	The Jurisdictional Classification of the proposed title.
<b>NU</b>	The Negotiating Unit of the proposed title.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.

Field	Description
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

### 4R – 06 Documents Page Field Descriptions

See the Documents section of this manual.

### 4R – 06 CC/DOB Determination Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request Documents CC/DOB Determination Fund Info Comments CC Comments

Agency: 01060 State Police [Trx Summary](#) Job Control #: 0304-10532

**Requests** View All First 3 of 3 Last

Div/Bur/Inst: Admin Request Status: Agency Submitted

Form CD: 4R Action CD: 06

**CC Determination**

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
App. As Requested	1464200	Agency Trng&Dv S 2	23	0	05
	1464200	Agency Trng&Dv S 2	23	0	05

☐ Streamlined?

Eff Date:


Determination Dt: Analyst:

**Budget Determination**

☐

Eff Date:  # Pos Affected: 1

Determination Dt: Examiner:

[Route To](#)  [Submit](#)

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#) [Add](#) [Update/Display](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>Prop TC</b>	The Title Code requested by the agency.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The Jurisdictional Classification of the requested title.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>Appr. TC</b>	The code of the approved title.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 11340 or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Eff. Date</b>	If streamlined, the date the position becomes effective. This value cannot be more than 30 days in the future, or 6 months in the past.
<b>Determination Dt</b>	The date the determination was made by C&C.

<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page DOB uses to record their determination. Grayed if streamlined.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b># Pos Affected</b>	The number of positions in the class.
<b>Eff. Date</b>	The date the reallocation becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	The C&C staff member to whom you want to route the transaction for review/approval.
<b>Role User</b>	When pressed, the Analyst can route the request to another Analyst for review/ approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 06 Fund Info Page Field Descriptions***

<b>Field</b>	<b>Description</b>
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>(Title)</b>	Title description.
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.
<b>Funding</b>	Not Applicable



#### 4R – 06 Comments & CC Comments Pages Field Descriptions



**NOTE:** Comments are not required for a 4R 06 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.




### Work with the Page




**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request.

Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




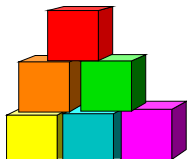
**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, accept the default value or click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.
5. If a streamlined request, check the **Streamlined?** box.
6. If streamlining, in the **Eff. Date** field, enter the date the reallocation becomes effective (if different than the system generated date).
7. Click the **Documents** page tab.
8. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
9. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
10. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

11. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
12. If this transaction does not need to be routed, click **Submit**.




## 4R - 07

Use to request a title structure change to a new title with a different allocation.




### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 07 Request Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > [4N/4R Transactions](#)

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
<p>*Agency: <input type="text" value="10000"/> Correctional Services <a href="#">Trx Sumry</a> <b>Job Control #:</b> 0304-10609</p> <p><b>Requests</b> <a href="#">View All</a> <a href="#">First</a> <a href="#">3 of 3</a> <a href="#">Last</a></p> <p>*Div Bur/Inst: <input type="text" value="admin"/> <b>Request Status:</b> Agency Submitted</p> <p>*Form CD: <input type="text" value="4R"/> *Action CD: <input type="text" value="07"/> *Proposed Eff Date: <input type="text" value="06/13/2003"/></p> <p># POS Aff: <input type="text" value="1"/></p> <p>Pres TC: <input type="text" value="0232220"/> Contract Mgt Spec 2 CS <b>SG:</b> 23 <b>JC:</b> 0 <b>NU:</b> 05</p> <p>Prop. Title: <input type="text" value="Dir Contract Mgt CS"/> <b>SG:</b> <input type="text" value="25"/> <b>JC:</b> <input type="text" value="2"/> <b>NU:</b> <input type="text" value="05"/></p> <p>Req Chgs: <b>NU</b> <input type="checkbox"/> <b>JC</b> <input checked="" type="checkbox"/> <b>Min Quals</b> <input checked="" type="checkbox"/></p> <p><b>C/C Assignment</b></p> <p><b>Section Head:</b> <b>Assigned Analyst:</b> <input type="text" value="LAR99"/> <a href="#">Route To</a></p> <p><b>Req Date:</b> 06/13/2003 <b>Requestor:</b></p> <p> <a href="#">Save</a> <a href="#">Return to Search</a> <a href="#">Next in List</a> <a href="#">Previous in List</a> <a href="#">Add</a> <a href="#">Update/Display</a> </p> <p> <a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a> </p>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date for the title structure change.
<b># Pos Aff</b>	The number of positions in the class affected by the structure change.
<b>Pres. TC</b>	The present Title Code and description being structure changed.
<b>SG</b>	The present Salary Grade of the title.
<b>JC</b>	The present Jurisdictional Classification of the title.
<b>NU</b>	The present Negotiating Unit of the title.
 <b>(Correction)</b>	When pressed, on the request page, opens those data fields that are not available on the determination page for modification.
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop Title</b>	The proposed title description.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The proposed Jurisdictional Classification.
<b>NU</b>	The proposed Negotiating Unit.
<b>Req. Chgs.</b>	NU, JC, Min Quals. If checked, indicates supporting documentation must be attached.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup remains blank until C&C receives the transaction.

Field	Description
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### 4R – 07 Documents Page Field Descriptions

See the Documents section of this manual.

#### 4R – 07 CC/DOB Determination Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

Agency: 10XXX Correctional Services Trx Summary Job Control #: 0304-10609

Requests View All First 3 of 3 Last

Div/Bur/Inst: admin Request Status: Agency Submitted

Form CD: 4R Action CD: 07

**CC Determination**

Action:	Description:	SG:	JC:	NU:
App. As Requested	Dir Contract Mgt CS	25	2	05
0817330	Sys Sup Pg Spec 3 Ins	25	0	05

☐ Streamlined?

Eff Date:

Determination Dt: 06/13/2003 Analyst: Law, Marshal

**Budget Determination**

# Pos Affected: 1

Eff Date:

Determination Dt: Examiner:

Route To Submit

Save Return to Search Next in List Previous in List Add Update/Display

Request Documents CC/DOB Determination Fund Info Comments CC Comments



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>(Prop Title)</b>	Will be blank
<b>Description</b>	The description of the requested Title Code.
<b>SG</b>	Proposed Salary Grade of the class.
<b>JC</b>	Proposed Jurisdictional Classification of the class.
<b>NU</b>	Proposed Negotiating Unit of the class.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>(Appr. TC)</b>	The code of the approved title. Input by C&C Analyst.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.

Field	Description
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 11340 or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Eff. Date</b>	The date the reallocation becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by C&C.
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b># Pos Affected</b>	The number of positions in the title affected by the structure change.
<b>Eff. Date</b>	The date the structure change becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	The C&C staff member that you want to route the transaction to for review/approval.
<b>Role User</b>	When pressed, the Analyst can route the request to another Analyst for review/ approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 07 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.

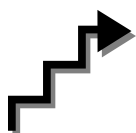
Field	Description
(Title)	Title description.
SG	Salary Grade.
JC	Jurisdictional Classification.
NU	Negotiating Unit.
Funding	Not Applicable

#### ***4R – 07 Comments & CC Comments Pages Field Descriptions***



**NOTE:** Comments are not required for a 4R 07 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.




### **Work with the Page**




**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.



**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.


1. Check any attached documents and the **Comments** page for additional information.



2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




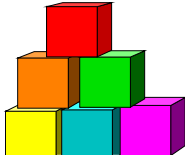
**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, click the , highlight the appropriate title code (must be a new title) and double click to select. The code may also be manually entered.
5. If a streamlined request, check the **Streamlined?** box.
6. If streamlining, in the **Eff. Date** field, enter the date the structure change becomes effective (if different than the system generated date).
7. Click the **Documents** page tab.
8. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
9. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
10. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

11. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
12. If this transaction does not need to be routed, click **Submit**.




## 4R - 41

Use to reclassify to an existing title and change the line item number(s).



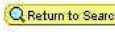







### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 41 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: 07000 Banking <span style="float: right;">Trx Sumry Job Control #: 0304-12603</span>					
<b>Requests</b> <span style="float: right;">View All First 2 of 2 Last</span>					
*Div Bur/Inst: Sup <span style="float: right;">Request Status: Agency Submitted .02</span>					
*Form CD: 4R *Action CD: 41 *Proposed Eff Date: 10/09/2003					
# POS Req: 1 <span style="float: right;">Location: 3110</span>					
Line # Range: Begin: 03507 End: <span style="float: right;">New York City - Manhattan</span>					
TC: 0301300 Senr Bank Examiner SG: 25 JC: 0 NU: 05 Pool ID: 015					
Incumbent: VACANT 					
Prop. TC: 0301520 Prin Bank Examiner 2 SG: 31 JC: 0 NU: 05					
Proposed Rate: <input type="radio"/> Hourly <input type="radio"/> Annual <input type="radio"/> NTE <input type="radio"/> S&E					
Chg to Loc: 3110 <span style="float: right;">New York City - Manhattan</span>					
Req Chgs: NU <input type="checkbox"/> JC <input type="checkbox"/> Min Quals <input type="checkbox"/> <span style="float: right;">Change to Line # Range: Begin: 99915 End: Pool ID: 015</span>					
<b>C/C Assignment</b>					
Section Head: DeSquor, Rocky		Assigned Analyst: LAR99 <span style="float: right;">Route To</span>			
Req Date: 10/09/2003 Requestor: Bama, Alley					
    <span style="float: right;"> </span>					
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date of the reclassification.
<b># Pos Req</b>	The number of positions requested to be reclassified.
<b>Line # Range: Begin</b>	The beginning line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Line # Range: End</b>	The ending line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Location</b>	The Location code and geographic description of the position(s). If different locations, "9999" will display.
<b>TC</b>	The Title Code and description of the position(s) being reclassified.
<b>SG</b>	Salary Grade of the position(s).
<b>JC</b>	Jurisdictional Classification of the position(s).
<b>NU</b>	Negotiating Unit of the position(s).
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>View Pos</b>	When pressed, a secondary page appears with all line items in the range. Shows the Title description, SG, JC, NU, and location.
<b>Incumbent</b>	The name of the person currently in the position. May also read "Various" or "Vacant".
 <b>(Correction)</b>	When pressed, on the request page, opens those data fields that are not available on the determination page for modification.

Field	Description
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. TC</b>	The code and description of the title to which the position(s) are being reclassified.
<b>SG</b>	Proposed Salary Grade of the position(s) being reclassified.
<b>JC</b>	Proposed Jurisdictional Classification of the positions being reclassified.
<b>NU</b>	Proposed Negotiating Unit of the position(s) being reclassified.
<b>Chg to Loc</b>	The Location to which the position(s) are being moved.
<b>Proposed Rate</b>	The proposed rate of the requested position if NS.
<b>Change to Line# Range: Beginning</b>	The beginning line number to which the request is being reclassified. This value cannot currently exist.
<b>Change to Line# Range: Ending</b>	System generated. The ending line number to which the request is being reclassified. The values in the range cannot currently exist and must be contiguous.
<b>Req. Chgs.</b>	NU, JC, Min Quals. If checked, indicates supporting documentation must be attached.
<b>Pool ID</b>	The proposed Pool ID.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup remains blank until C&C receives the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

## 4R – 41 Documents Page Field Descriptions

See the Documents section of this manual.

## 4R – 41 CC/DOB Determination Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 07000 Banking [Trx Sumry](#) Job Control #: 0304-12603

**Requests** View All First 2 of 2 Last

Div/Bur/Inst: Sup Request Status: Agency Submitted .02

Form CD: 4R Action CD: 41

**CC Determination**

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
App: As Requested	0301520	Prin Bank Examiner 2	31	0	05
	0301520	Prin Bank Examiner 2	31	0	05

☐ Streamlined?

# Positions

# Positions Req: 1 Approved: 1 Disapproved:

Determination Dt: Analyst:

**Budget Determination**

Line #(Range) Approved: thru:

# Positions

CC Apprv: 1 Approved: Disapproved:

Determination Dt: Examiner:

Route To Submit

Save Return to Search Next in List Previous in List Add Update/Display

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.

Field	Description
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>Prop. TC</b>	The Title Code requested by the agency.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The Jurisdictional Classification of the requested title.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
<b>Appr. TC</b>	The code of the approved title. Input by C&C Analyst.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Rate</b>	The C&C rate of the requested position if NS.
<b># Positions Req.</b>	The number of positions requested.
<b>Approved</b>	The number of positions C&C approved.
<b>Disapproved</b>	The number of positions C&C disapproved.
<b>Eff. Date</b>	The date the reclassification becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by C&C.

Field	Description
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.
<b>Line # (Range) Approved: thru:</b>	System generated. The line number range of the approved position(s).
<b># Positions</b>	Determination information on the positions.
<b>C&amp;C Apprv</b>	Number of positions C&C approved.
<b>Approved</b>	Number of positions DOB approved.
<b>Disapproved</b>	Number of positions DOB disapproved.
<b>Eff. Date</b>	The date the reclassification becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/lt</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member that you want to route the transaction to for review and/or approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 41 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Item Range: to:</b>	The range of line items requested.
<b>Title</b>	Title Code and description.

Field	Description
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.
<b>Change to Line Range</b>	Line range to which the positions are being moved.
<b>Funding</b>	The area of the page that displays the funding information.
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>Program</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Subfund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund Type</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

#### 4R – 41 Comments Page Field Descriptions



**NOTE:** Comments are not required for a 4R 41 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.







## Work with the Page



**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

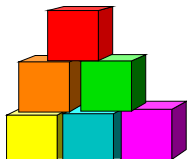
4. In the **Appr. TC** field, accept the default value or click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.
5. In the **SG** field, enter the approved salary grade if different than the default value.
6. In the **JC** field, enter the approved jurisdictional class if different than the default value.
7. In the **NU** field, enter the approved negotiating unit if different than the default value.
8. If a streamlined request, check the **Streamlined?** box.
9. If a streamlined request and an NS salary grade, in the **Rate** workgroup select the appropriate radio button if different than requested.
10. Enter the dollar value or the equated salary grade.

11. In the # **Positions Approved** field, enter the number of positions C&C is approving if different than the default value.
12. If streamlining, in the **Eff. Date** field, enter the date the reclassification becomes effective (if different than the system generated date).
13. Click the **Documents** page tab.
14. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
15. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
16. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

17. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
18. If this transaction does not need to be routed, click **Submit**.




## 4R - 42

Use to reclassify to a new title and change the line item number(s).






### Access the Page

1. Click  **Worklist**.  
*A Worklist page will display.*
2. Select the transaction to be worked.

### 4R – 42 Request Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Long Form Requests](#) > [Use](#) > **4N/4R Transactions**

Request	Documents	CC/DOB Determination	Fund Info	Comments	CC Comments
*Agency: <input type="text" value="27000"/> Tmp&Disabl Asst <span style="float: right;"><a href="#">Trx Sumry</a> Job Control #: 0304-12132</span>					
<b>Requests</b> <span style="float: right;">View All First 1 of 1 Last</span>					
*Div Bur/Inst: <input type="text" value="ADMIN HEARINGS"/> <b>Request Status:</b> Agency Submitted					
*Form CD: <input type="text" value="4R"/> *Action CD: <input type="text" value="42"/> *Proposed Eff Date: <input type="text" value="09/05/2003"/>					
<div style="display: flex; justify-content: space-between;"> <div>             # POS Req: <input type="text" value="1"/> </div> <div> <b>Line # Range</b>              Begin: <input type="text" value="19615"/> End: <input type="text"/> </div> <div> <b>Location:</b> 3110              New York City - Manhattan           </div> </div>					
TC: 2501206 Clerk 1 Spanish Lang SG: 06 JC: 0 NU: 02 Pool ID: 026					
<b>Incumbent:</b> Leadinghart, Bea 					
Prop. Title: <input type="text" value="LEGAL AFFAIRS AIDE"/> SG: <input type="text" value="13"/> JC: <input type="text" value="0"/> NU: <input type="text" value="02"/>					
<div style="display: flex; justify-content: space-between;"> <div> <b>Proposed Rate</b>  <input checked="" type="radio"/> Hourly <input type="radio"/> Annual <input type="radio"/> NTE <input type="radio"/> SG EQ           </div> <div>             Chg to Loc: <input type="text" value="0110"/> Albany           </div> </div>					
<div style="display: flex; justify-content: space-between;"> <div>             Req Chgs: NU <input type="checkbox"/> JC <input type="checkbox"/> Min Quals <input checked="" type="checkbox"/> </div> <div> <b>Change to Line # Range</b>              Begin: <input type="text" value="19979"/> End: <input type="text"/> </div> <div>             Pool ID: <input type="text" value="027"/> </div> </div>					
<b>C/C Assignment</b>					
<div style="display: flex; justify-content: space-between;"> <div> <b>Section Head:</b> DeSquori, Rocky           </div> <div> <b>Assigned Analyst:</b> <input type="text" value="LAR99"/>  </div> <div> <a href="#">Route To</a> </div> </div>					
Req Date: 09/05/2003 Requestor: Shaw, Rick					
<div style="display: flex; justify-content: space-between;"> <div> <a href="#">Save</a> <a href="#">Return to Search</a> </div> <div> <a href="#">Add</a> <a href="#">Update/Display</a> </div> </div>					
<a href="#">Request</a>   <a href="#">Documents</a>   <a href="#">CC/DOB Determination</a>   <a href="#">Fund Info</a>   <a href="#">Comments</a>   <a href="#">CC Comments</a>					

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Proposed Eff. Date</b>	The proposed effective date of the reclassification.
<b># Pos Req</b>	The number of positions requested to be reclassified.
<b>Line # Range Begin</b>	The beginning line number of the position(s) requested. All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Line # Range End</b>	The ending line number of the position(s) requested. All line item numbers must currently exist, must be contiguous, and must have the same attributes.
<b>Location</b>	The Location code and geographic description of the position(s). If different locations, "9999" will display.
<b>TC</b>	The Title Code and description of the position(s) being reclassified.
<b>SG</b>	Salary Grade of the position(s).
<b>JC</b>	Jurisdictional Classification of the position(s).
<b>NU</b>	Negotiating Unit of the position(s).
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>View Pos</b>	When pressed, a secondary page appears with all line items in the range. Shows the Title description, SG, JC, NU, and location.
<b>Incumbent</b>	The name of the person currently in the position. May also read "Various" or "Vacant".
 <b>(Correction)</b>	When pressed on the request page, opens those data fields that are not available on the determination page for modification.

Field	Description
<b>Audit</b>	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
<b>Prop. Title</b>	The proposed title for the position(s) being reclassified.
<b>SG</b>	Proposed Salary Grade for the new title.
<b>JC</b>	Proposed Jurisdictional Classification for the new Title.
<b>NU</b>	Proposed Negotiating Unit for the new title.
<b>Chg to Loc</b>	The Location to which the position(s) are being moved.
<b>Proposed Rate</b>	The proposed rate of the requested position(s) if NS.
<b>Change to Line# Range Beginning</b>	The beginning line number to which the request is being reclassified. This value cannot currently exist.
<b>Change to Line# Range Ending</b>	System generated. The ending line number to which the request is being reclassified. This value cannot currently exist and must be contiguous.
<b>Req. Chgs.</b>	NU, JC, Min Quals. If checked, indicates supporting documentation must be attached.
<b>Pool ID</b>	The proposed Pool ID.
<b>C/C Assignment</b>	The area of the page that displays the C&C staff assigned to the transaction. This workgroup remains blank until C&C receives the transaction.
<b>Section Head</b>	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
<b>Assigned Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member to whom you want to route the transaction for review and/or approval.
<b>Req. Date</b>	The date the request was saved or submitted.
<b>Requestor</b>	The person requesting the transaction.

#### ***4R – 42 Documents Page Field Descriptions***

See the Documents section of this manual.

**4R – 42 CC/DOB Determination Page Field Descriptions**

Home > NY Title and Position Mgmt > TPM Long Form Requests > Use > 4N/4R Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

Agency: 27000 Tmp&Disabl Asst Trx Sumry Job Control #: 0304-12132

**Requests** View All First 1 of 1 Last

Div/Bur/Inst: ADMIN.HEARINGS Request Status: Agency Submitted

Form CD: 4R Action CD: 42

**CC Determination**

Action: App. As Requested Description: LEGAL AFFAIRS AIDE SG: 13 JC: 0 NU: 02  
 1234567 LEGAL AFFAIRS AIDE 13 0 02

☐ Streamlined?

# Positions

# Positions Req: 1 Approved: 1 Disapproved:

Determination Dt: Analyst:

**Budget Determination**

Line #(Range) Approved: thru:

# Positions

CC Apprv: 1 Approved: Disapproved:

Determination Dt: Examiner:

Route To Submit

Save Return to Search Add Update/Display

Request Documents CC/DOB Determination Fund Info Comments CC Comments



**NOTE:** The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Trx Sumry</b>	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Request Status</b>	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.

Field	Description
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>C/C Determination</b>	The area of the page C&C uses to record their determination.
<b>Action</b>	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
<b>(Prop. TC)</b>	Will be blank.
<b>Description</b>	Description of the requested title.
<b>SG</b>	The proposed Salary Grade.
<b>JC</b>	The proposed Jurisdictional Classification.
<b>NU</b>	The proposed Negotiating Unit.
<b>Disp. Date</b>	Disposal Date. Appear only if the Action is "Withdraw" or "Deny".
<b>Appr. TC</b>	The code of approved the title. Input by C&C Analyst.
<b>Description</b>	Description of the Approved Title Code.
<b>SG</b>	The approved Salary Grade.
<b>JC</b>	The approved Jurisdictional Classification.
<b>NU</b>	The approved Negotiating Unit.
<b>Streamlined</b>	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination.
<b>Rate</b>	The C&C rate of the requested position if NS.
<b># Positions Req.</b>	The number of positions requested.
<b>Approved</b>	The number of positions C&C approved.
<b>Disapproved</b>	The number of positions C&C disapproved.
<b>Eff. Date</b>	The date the position becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
<b>Determination Dt</b>	The date the determination was made by C&C.
<b>Analyst</b>	The C&C Analyst assigned to this transaction.
<b>Budget Determination</b>	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
<b>Action</b>	Approved as Requested, Denied, Withdrawn.

Field	Description
<b>Line # (Range) Approved: thru:</b>	System generated. The line number range of the approved position(s).
<b># Positions</b>	Determination information on the positions.
<b>C&amp;C Apprv</b>	Number of positions C&C approved.
<b>Approved</b>	Number of positions DOB approved.
<b>Disapproved</b>	Number of positions DOB disapproved.
<b>Eff. Date</b>	The date the reclassification becomes effective.
<b>Determination Dt</b>	The date the determination was made by DOB.
<b>Examiner</b>	The DOB Examiner assigned to the transaction.
<b>Route To/It</b>	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
<b>Role User</b>	The C&C staff member that you want to route the transaction to for review and/or approval.
<b>Global</b>	When pressed, allows the user to enter values globally (for all sequences within the transaction).
<b>Submit</b>	Submits the transaction to the next approval level.

#### ***4R – 42 Fund Info Page Field Descriptions***

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.
<b>Form CD</b>	The code of the type of transaction being requested; i.e. 4N or 4R.
<b>Action CD</b>	The action code related to the form code; i.e. 01, 02, 03, etc.
<b>Item Range: to:</b>	The range of line items requested.
<b>(Title)</b>	Title description.
<b>SG</b>	Salary Grade.
<b>JC</b>	Jurisdictional Classification.
<b>NU</b>	Negotiating Unit.



Field	Description
<b>Change to Line Range: To:</b>	Line range to which the position(s) are being moved.
<b>Funding</b>	The area of the page that displays the funding information.
<b>Pool ID</b>	Indicates from which PayServ funding source the position is being paid.
<b>Program</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Subfund</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
<b>Fund Type</b>	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

#### 4R – 42 Comments Page Field Descriptions



**NOTE:** Comments are not required for a 4R 42 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
<b>Agency</b>	The Agency Code and name requesting the transaction.
<b>Job Control #</b>	System generated number that will display upon saving or submitting.
<b>Request Level Comments</b>	Free form field that allows users to enter comments related to the entire Job Control number. The field will allow up to 254 characters.
<b>Sequence Level Comments</b>	Free form field that allows users to enter comments at the Job Seq number. The field will allow up to 8000 characters.
<b>Div Bur/Inst</b>	The Division, Bureau or Institution within the agency.





## Work with the Page



**NOTE:** For instructions as to how to initiate a long form transaction, please refer to the appropriate section of the Agency User Manual.




**NOTE:** If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




**NOTE:** If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, click the , highlight the appropriate title code (must be a new title) and double click to select. The code may also be manually entered.
5. If a streamlined request, check the **Streamlined?** box.
6. If a streamlined request, in the **Rate** workgroup select the appropriate radio button if different than requested.
7. Enter the dollar value or the equated salary grade.
8. In the **# Positions Approved** field, enter the number of positions C&C is approving if different than the default value.
9. If streamlining, in the **Eff. Date** field, enter the date the reclassification becomes effective (if different than the system generated date).
10. Click the **Documents** page tab.

11. Attach the appropriate and required documents (see instructions in the Documents section of this manual).
12. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the **CC Comments** page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
13. Click the **CC/DOB Determination** page tab.



**NOTE:** On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

14. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
15. If this transaction does not need to be routed, click **Submit**.