

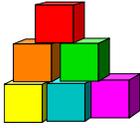
# Concurrent Appointment Request

## Chapter Topics

---

<b>Concurrent Appt Request.....</b>	<b>8-3</b>
Creating a Concurrent Appt Record .....	8-3
<b>Processing Transactions for Employees with More Than One</b>	
<b>Employment Record Number .....</b>	<b>8-5</b>
Accessing the Correct Empl Rcd# .....	8-5
Dual Employees: Processing Transactions Using Action Codes: LOA, PLA, LTO, STO, or SEP (Except Reason Code DEC) .....	8-6
Dual Employees: Processing Transaction Using Action Codes: RET or TER (With Reason Code DEC) .....	8-6

This page intentionally left blank.



## Concurrent Appt Request

Concurrent Appt Request is used to submit initial transactions for a person who will be a dual employee. This person will be paid from two or more positions in one agency AND will have different status and/or titles in these positions OR will be paid from positions in two or more agencies. The transaction creates an additional **Empl Rcd#** (Employment Record Number) for the employee.

### Creating a Concurrent Appt Record

Determine the highest Employment Record Number for the employee by accessing Employee History. Be sure to leave the **Empl Rcd Nbr** field blank. The list box displays a separate row for each employment record number. NYSTEP brings you to the Employee’s history if only one record exists.



### Access the Page

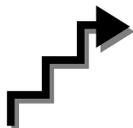
1. Click **NY Personnel Management, Incumbent Change Request, Use, Concurrent Appt Request**.

*The Concurrent Appt Request search dialog box displays.*

2. In the **SSN** field, type the Social Security Number for the employee. Press **Tab**.

3. In the **Empl Rcd Nbr** field, enter the next sequential Employment Record Number for the employee. Click **Add**.

*The **Transaction Request** component is displayed with **Transaction Request 1** active.*



## Work with the Page

1. In the **Eff Dt** field, enter the new effective date (mmddyy).
2. In the **Seq** field, the default value of 0 is displayed. If this value is correct, press **Tab**. If other transaction(s) have been submitted with the same effective date, enter the correct sequence number.
3. In the **Action** field, enter either *IAG* or *XAG* as appropriate.

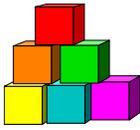
If the appointment is to a position within the same agency as the employee's current position, use **IAG**.

If the appointment is to a position within a different agency than the employee's current position, use **XAG**.

4. In the **Trans Grp** field, click the  and select the appropriate code.
5. In the **Reason** field, click the  and select the appropriate code.
6. To complete the remaining fields as required for the selected Action/Trans Grp/Reason code combination see the following chapters: if using Action IAG, see the *Other Transaction Request* chapter; if using Action XAG, see the *Cross Agency Appointment Request* chapter. Note: A difference when using these chapters is: transactions entered through **Concurrent Appointment Request** will not require a SEP Reason for Action IAG or create a system generated separation for Action XAG.



**NOTE:** Once the concurrent appointment has been approved by DCS all future transactions against the position must be done using the new Employment Record Number through the regular component. See the section *Processing Transactions for Employees with More Than One Employment Record Number*, in this chapter, for additional information.



## Processing Transactions for Employees with More Than One Employment Record Number



**WARNING:** When processing any transaction for an employee with multiple Employment Record Numbers (Empl Rcd #), the agency should be very careful to select the correct Empl Rcd # corresponding to the correct position.

Employees with multiple **Empl Rcd#s** may or may not currently be active in multiple items.

Once a concurrent appointment has taken place, subsequent transactions for that position are processed using the regular **Incumbent Change Request** or **Encumbent Change Request** component AND the corresponding **Empl Rcd #**.

### Accessing the Correct Empl Rcd#

1. Determine if the action should take place using the **Incumbent or Encumbent Change Request**, and start the module.
2. Select the correct component to process the desired transaction from the **Use** menu.
3. In the search dialog box, enter the **SSN** for the employee.
4. Click **Search** to display a complete list of Empl Rcd #s within the same agency for the employee and select from the list.

OR

5. In the **Empl Rcd#** field, enter the number that corresponds to the position against which the transaction is being processed. Press **Search**.  
*The selected component is displayed.*

## Dual Employees: Processing Transactions Using Action Codes: LOA, PLA, LTO, STO, or SEP (Except Reason Code DEC)

1. If the employee is separating from concurrent positions within the same agency, a transaction request must be processed by the agency for each **Empl Rcd#** (position) affected.
2. If the employee is separating from concurrent positions in different agencies, a transaction request must be processed by each agency for the **Empl Rcd#** (position) affected within that agency.



**NOTE:** For Action Reasons that exist with TER and SEP, **always** use SEP.

## Dual Employees: Processing Transaction Using Action Codes: RET or TER (With Reason Code DEC)

When an employee retires (RET) or dies (TER/DEC) while in State service, only one agency from which the employee was paid needs to process the transaction request using an **Empl Rcd#** within their agency.



**NOTE:** Once NYSTEP receives the transaction, the action will be taken against all positions and hold items for the employee in all agencies, regardless of **Empl Rcd#**.