Chapter 16

Reviewing, Revising and Deleting Transactions

Chapter Topics

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Reviewing / Revising / Deleting Transaction Pages (Initiated)

Only initiated transactions (saved, but not submitted) can be revised by the user. Once requested, transactions can only be viewed.

1. Choose the same **NY Personnel Management** menu option (**Incumbent** or **Encumbent Change Request**) and **Use** menu option that initiated the transaction.
   The appropriate search dialog box for the transaction will display.

2. In the search dialog box, enter the appropriate data needed to retrieve the transaction. Depending on the type of transaction being retrieved, click either **Search** or **Find an Unprocessed Transaction**.
   The Transaction page(s) will display.

3. Review the transaction. As the transaction has only been initiated, the pages will allow changes.

NOTE: If you have saved a transaction (other than a New Hire/Rehire) and you want to delete the entire transaction, click the delete a row icon. If you have saved a New Hire/Rehire transaction and want to delete the entire transaction, call your Status Examiner.

4. Choose either save or submit as appropriate.

Reminder: All required data fields on all pages within the component must be complete before a transaction can be saved or submitted.

Reviewing Transaction Pages (Requested, Approved, or Processed)

The **Transaction Request 1** and **Transaction Request 2** pages for all transactions submitted, approved or processed for any employee within NYSTEP can be reviewed by the requesting agency.

Access the Page

1. Click **NY Personnel Management**, **Incumbent Change Request** or **Encumbent Change Request** depending on the module used to initiate the transaction.

2. Click **Use**, **Other Transaction Request**, **Transaction Request 1** or **Use**, **Enc Other Transaction Request**.

   The appropriate search dialog box displays.

3. In the **SSN** field, type the Social Security Number for the employee or use the alternate search fields. For **Encumbent Change Requests**, the search dialog box will require information about the Hold. Click **Search**.

   A list box displays the results of the search.

4. Select the record for the desired employee and correct **Empl Rcd #**. Double click or press **Select**.

The **Transaction Request 1** or **Enc Transaction Request 1** page displays containing the information on the current appointment or pending transaction for the selected employee. (If no transactions for this employee have occurred in NYSTEP, the fields on the page are blank.)

Work with the Page

1. Click the appropriate page tab to view the transaction.

NOTE: The **View All** hyperlink allows the User to view and scroll through all the data rows together. The **First** hyperlink brings the User to the first (the most recent) row of data. The **1 of #** shows the User how many rows of data exist. The **Last** hyperlink brings the User to the last (the oldest) row of data. To view one row at a time, use the arrow to the right of **First** and the arrow to the left of **Last** to navigate back and forth between rows.

NOTE: Once a transaction has a status of Requested, Approved or Processed, the agency must contact their DCS Status Examiner to make any changes.