Chapter 15

Submitting and Saving Transactions

Chapter Topics

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Submitting / Saving Transactions

Submitting Transactions

Transactions that do not require RIF clearance can be submitted up to 30 days prior to the effective date of the transaction. These transactions will be approved by DCS and posted to the database immediately upon processing and displays on the **Employee Availability**, **Employee History**, and the **Position /Employee Summary** pages. However, it will not display on the **Position Availability** page until the effective date of the transaction.

Transactions that require RIF clearance must be submitted within the time frame for which the RIF Clearance Number was issued.

All required data fields on all pages within the component must be complete before the transaction is submitted.

1. Press the **Submit** button located on the **Transaction Request 2** or **Enc Transaction Request 2** or the **System Generated Separation** (Incoming Worklist Separations) page.

The **Submit** button subjects the transaction to additional edits and may return a series of error/warning messages. An error message requires either a change to the transaction or some other action be taken before the submission is successful. A warning message does not require a change. It indicates that you may want to check something and possibly change the transaction before you submit. It will not prevent submission. NYSTEP then transmits the transaction to DCS for review, approval, and final processing. Once a transaction has been submitted, it can only be viewed. It cannot be changed at the agency level.

Some transactions are virtually approved which means they do not need additional review by DCS. These transactions are written directly to the database and the **Trans Status** will immediately display **Processed**.

When the Submit button is pressed, and the transaction has passed all edits, the following message will display:

The User can either press **Yes** to continue with the submission, or **No** to review or make changes.

Below the **Submit** button the transaction status information displays.

Tran Status (Transaction Status) The information displayed in this field will change as a transaction proceeds through the approval process. The **Tran Status** values are as follows.

Initiated – If the agency has begun work on the transaction, or if a transaction has been saved but not submitted, the status will display as **Initiated**.

Requested – The agency has submitted the transaction to DCS.

Approved – The Status Examiner has approved the transaction, but it has been forwarded to the Special Transactions Unit for further processing.

Processed – DCS has approved the transaction or the transaction has been virtually approved, and the information has been posted on NYSTEP.

Denied – DCS has disapproved the transaction.

Status Dt (Status Date) The date the displayed **Tran Status** took place.

NOTE: **Tran Status** and **Status Dt** do not appear on the **System Generated Separation** pages.

Saving Transactions

When a transaction is submitted to DCS, the information is saved automatically. If necessary, a transaction can be saved without submitting it to DCS. All required data fields on all pages within the component must be complete before the transaction can be saved, however.

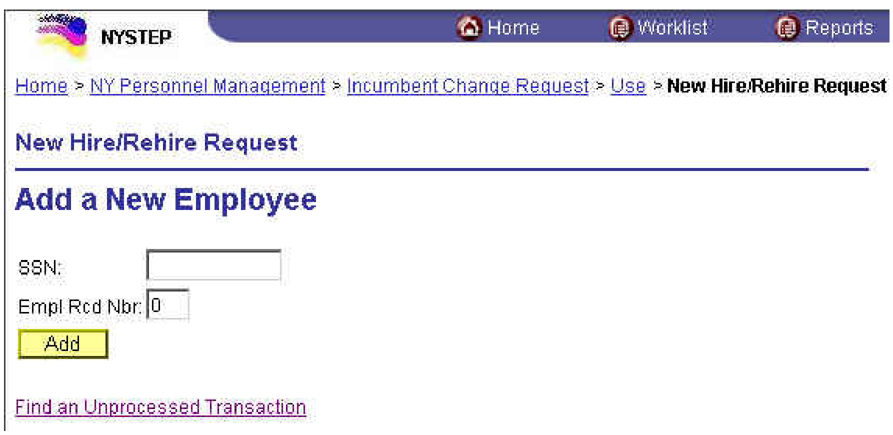
1. Click the Save icon 

located in the bottom left-hand corner of any transaction page. The transaction will be subjected to additional edits which may result in a series of error messages / warnings. Changes may be needed before the save can complete (see detailed explanation under *Submitting Transactions* on the previous page).

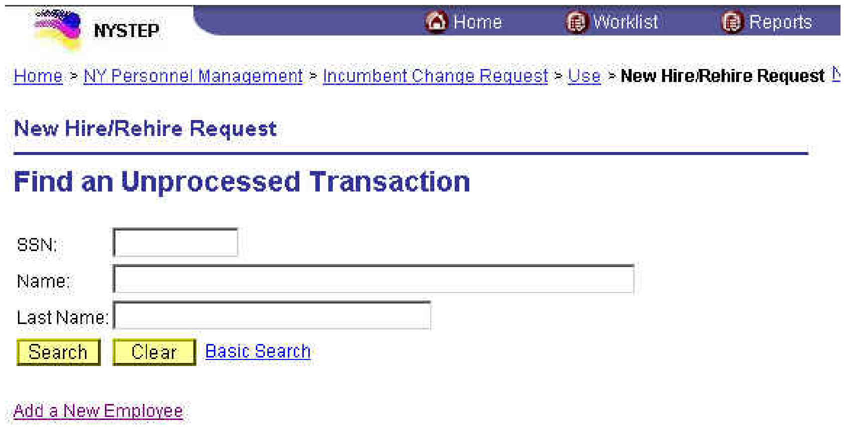
Accessing Saved Transactions

To access saved transactions:

1. Follow the same menu option links as used to process a transaction type.
   The transaction type search dialog box will display. Below is a search dialog box for a New hire/Rehire transaction.



2. In the Search Dialog box, click on the **Find an Unprocessed Transaction** hyperlink.
   The Find an Unprocessed Transaction search dialog box will display



3. In the **SSN** field, enter the SSN for the employee OR **Tab** down and use the **Name** or **Last Name** field. The **Name** field utilizes PeopleSoft format (Lastname,Firstname and the **Last Name** field requires all caps and converts all typing to caps). The search feature will work faster if at least the last name and first initial are keyed in the **Name** field. Press **Search**.

4. If SSN was entered, the record is displayed. If the **Name** or **Last Name** fields were used, and more than one person with same name exists, a list will display. Highlight and double click the correct record on the list to select.