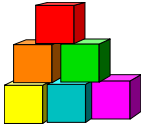


Transactions Involving Holds

Chapter Topics

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Transactions Involving Holds

There are many different types of transactions involving holds. Actions such as appoint leave, appoint continue, change hold, and reinstate from leave are among the most common. This chapter contains detailed information regarding the component, menu options and action/reason code combinations needed to process transactions involving holds.

NYSTEP maintains hold items in a separate table and allows users to process actions directly against that table. The nature of the transaction determines if the **Encumbent** or **Incumbent Change Request** component is used. For those transactions that use the **Encumbent Change Request** module, information regarding the position on the current hold is required in the search dialog box as shown below.

Sample Encumbent Change Request Search Dialog Box

In the search dialog box for an **Encumbent Change Request** enter information for the current hold.

Enter the complete **SSN AND Title Code** for the current hold **AND**



NOTE: If the transaction is a change to an existing hold, and the title code is changing, the new title code will be entered or displayed on the **Enc Transaction Request 1** page not in the dialog box (i.e. HLD ADV).

Enter either:

- (a) **Position Number** for the current hold **OR**
- (b) **Agency AND Line Item Number** for the current hold.



NOTE: If the transaction is a change to an existing hold, and the line number is changing, the new line number is entered on the **Enc Transaction Request 1** page not in the dialog box (i.e. HLD CHO).

Transactions Involving Leaves Generated by an Action of SEP, or a SEP Reason of LIT, LOT, MLV, PBL

PBL (Probationary Leave)

MLV (Mandatory Leave)

LIT (Discretionary Leave Internal)

LOT (Discretionary Leave Out) – Generated by an Appoint Leave

Transaction	Panel Group	Action Code	SEP Rsn/ Reason Code
<p>Place an employee on leave in conjunction with:</p> <p>The appointment of an active employee under the action code IAG.</p> <p>The appointment of an active employee under the action code XAG.</p> <p>A Separation: A losing agency may submit a transaction separating an employee prior to receiving an Incoming Worklist Separations panel. (However, this is not the preferred method. Please see the Worklist chapter.)</p>	<p>Incumbent Change Request</p> <p>Incumbent Change Request</p> <p>Incumbent Change Request</p>	<p>Action, Trans Group and Reason codes for appointment are entered on Transaction Request 1. Enter leave type in Sep Rsn code field on same page.</p> <p>Action, Trans Group and Reason codes for appointment are entered on Transaction Request 1. Sep Rsn grays for appointing agency. Losing agency receives separation page to enter separation reason.</p> <p>SEP</p>	<p>PBL MLV LIT</p> <p>PBL MLV (OMH & OMR only) LIT</p> <p>PBL MLV (OMH & OMR only) LIT</p>

Transaction	Panel Group	Action Code	SEP Rsn/ Reason Code
Process a transaction against an encumbent's hold item (i.e., change hold item, change employee's status in the hold item, extend leave).	Encumbent Change Request	HLD	Appropriate Code for Transaction
Process an appointment and immediate leave for an inactive or new employee resulting in a hold.	Encumbent Change Request	Use Action Code HIR or REH and appropriate Trans Group and Reason codes for the appointment on Enc Transaction Request 1. Sep Rsn field will populate with LOT.	LOT
Process an appointment and immediate leave for an active employee resulting in a new hold. (Use action code HLD for the appointment.)	Encumbent Change Request	Use Action Code HLD and appropriate Trans Group and Reason codes for the appointment on Enc Transaction Request 1. Enter leave type in Sep Rsn field on same page.	PBL MLV LIT
Reinstate an employee to a Hold item.	Incumbent Change Request	IAG- Other Transaction Request or XAG – Cross Agency Appointment Request or RFL – Cross Agency Appointment Request (Appoint Leave)	RLV

Transactions Involving Leaves Generated by (LOA, LTO, STO)

(These are leaves without pay. The Encumbent is not being paid from any position in NYSTEP.)

CCL (Child Care Leave)
EDL (Education Leave)
FML (Family Medical Leave)
LOT (Discretionary Leave Out) – Not generated by an Appoint Leave
LTO (Long Term Disability)
LTU (Leave to Unclassified Service)
MLL (Military Leave)
RPD (Remove Pending Determination)
S72 (Leave S72)
SKL (Sick Leave)
STO (Short Term Disability)
SUP (Suspension)
WDL (Workers Comp Dis Leave)
WPS (Workers Comp PT Sup)

Transaction	Panel Group	Action Code	Reason/SEP RSN Code
Place an employee on leave.	Incumbent Change Request	LOA LTO STO	One of the above.
Extend a leave.	Incumbent Change Request	IAG	EXL
Process a transaction against an encumbent's hold item (i.e., change hold item, change employee's status in the hold item).	Encumbent Change Request	HLD	Appropriate code for transaction.

Transaction	Panel Group	Action Code	Reason/SEP RSN Code
Change the type of leave without pay.	Incumbent Change Request	LOA LTO STO	One of the above.
Reinstate an employee.	Incumbent Change Request	RFL	RLV RSP

Transactions Generated by (PLA)

*(These are paid leaves. An employee on one of these leaves appears in NYSTEP as **Incumbering the position.**)*

EDW (Education Leave with Pay)

SLW (Sick Leave with Pay)

SPF (Disciplinary Suspension with Pay)

WSP (Workers Compensation Leave)

Transaction	Panel Group	Action Code	SEP RSN/Reason Code
Place an employee on leave with pay.	Incumbent Change Request	PLA	EDW SLW SPF WSP
Process a transaction against an employee on paid leave (i.e., change line, change employee's status, extend leave end date).	Incumbent Change Request	IAG	Appropriate code for transaction.
Change the type of paid leave.	Incumbent Change Request	PLA	EDW SLW SPF WSP
Change paid leave to leave without pay.	Incumbent Change Request	IAG	An appropriate reason code for the leave without pay.
Reinstate an employee from paid leave.	Incumbent Change Request	IAG	RLV RSP