University Wisconsin Madison - Office of Human Resources

Rate/Title Adjustment System Manual

2/19/2009

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Web Address (URL)

A link to the PVL/Rate-Title Change system can be found on the Web page titled "Links for OHR Information Systems" maintained by the Office of Human Resources. This Web page also has additional information you may need to make a successful connection to the OHR Information Systems:

http://www.ohr.wisc.edu/ohr/Informationsystems/index.htm
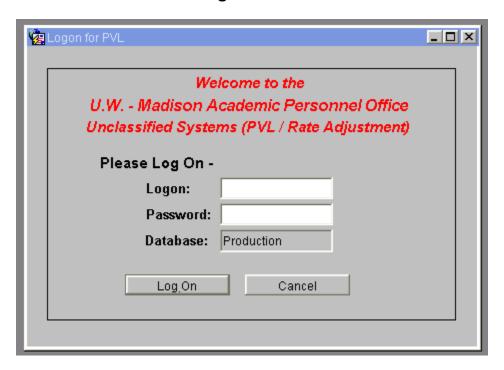
Please make a bookmark for this address/URL

THE UNIVERSITY *of* WISCONSIN
MADISON

OFFICE OF HUMAN RESOURCES

Links for OHR Information Systems

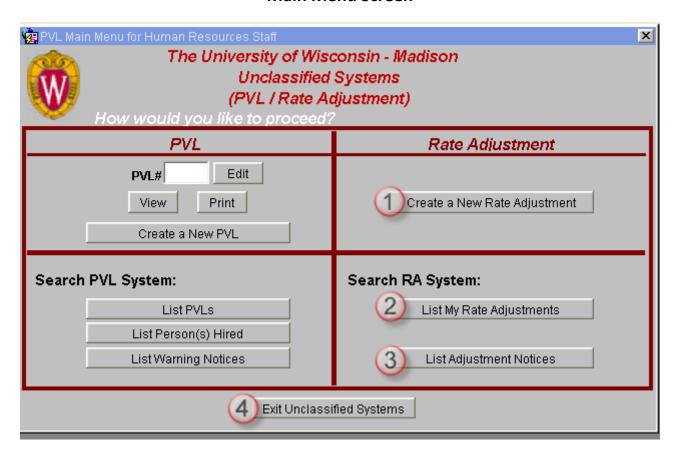| CLASSIFIED HR SYSTEMS	ACADEMIC HR SYSTEMS
CHRIS Help Instructions, frequently asked questions, troubleshooting and other guidance related to the creation, submittal, approval and other processing of HR Transactions using the CHRIS system.	**PVL and Rate/Title Adjustment Help** Instructions related to the creation, submittal, approval of HR Transactions using the PVL and the Rate/Title Adjustment System
CHRIS (Classified Human Resources Information System): [Formerly E-PD] **Web-based System for supervisors and others** (using PCs) to create and submit HR Transactions (e.g., vacancies, reclasses, PD updates).All users running Microsoft™ Internet Explorer version 5.5 and greater, Netscape™ 7.0 and greater, FireFox, Mozilla, etc., should have Sun's Java™ plug-in	**PVL and RA (Position Vacancy Listing and Rate Adjustment) System:** **Web-based system used by HR staff** (using PCs) to work on **unclassified** transactions. All users running Microsoft™ Internet Explorer version 5.5 and greater or Netscape™ 7.0 and greater, FireFox, Mozilla, Safari, etc., should have Sun's Java™ plug-in Version 1.5.0 04 or higher for MS Windows installed on their machines.

Logon Screen

Logon	Enter the unique logon initials that were assigned to you. *Note: In most cases, your Logon will be your current 3270 Logon ID.*
Password	Enter your "uwp1" password. *It is a unique combination of alpha and numeric characters that were assigned to you when you were authorized to use any of the UWP1 systems (e.g., PVL/CHRIS). Note that you can change the assigned password by going to: http://www.wisc.edu/drmt/pass_chg.html and clicking the link for* Password update for UW Production (UWP1)
Log On Button	Click on the <Log On> button or press <Enter> after typing your Password.

Main Menu Screen

After logging in, the first screen you will see is the Systems' Main Menu Screen. Note that if you are authorized only for the Rate/Title Adjustment System, the PVL Number field and all of the buttons on the left for navigation into the PVL System will be disabled (grayed out).

From this screen the following functions are available:

1	Press <Create a New Rate Adjustment> button if you wish to start a new Rate or Title change for an employee.
2	Press the <List My Rate Adjustments> button to see Rate/Title change records requiring your attention.
3	Press the <List Adjustment Notices> button to see if there are any System Notices requiring your attention.
4	Press this button to exit out of the Systems.

List of Tabs and Their Content

Title	Description
Appointment	The Appointment tab contains basic data about the Adjustment, the Employee and the Employee's appointment departments.
Salary/Title	The Salary/Title tab is where the Rate and Title Change Reasons, the Proposed Salary and Proposed Title information is created, updated and viewed.
Contact	The Contact tab is where information about the Primary, Administrative and Alternate contact is entered, updated or viewed.
Appt History	The Appt History tab displays summary data regarding the person's employment history with UW (including the appointment referenced on the current Adjustment) can be viewed.
Funding/Docs	The Funding/Docs tab is where funding sources for the rate change are entered, updated or viewed. Also, if additional documents for the adjustment are required (such as Market Data), it is the place where the Document received dates are entered, updated or viewed.
Duties	The Duties tab is where the individual's new Duties are entered, updated or viewed. This tab is also where the Number of FTEs supervised field is found.
Justification	The Justification tab is where one can enter, update or view data on how the duties have changed or how the promotion criteria is met (if Promotion is selected as one of the change reason codes).
Budget	The Budget tab is where information about the person's Budgetary responsibilities is entered, updated and viewed.
Comment	The Comment tab is where comments are created, updated and viewed.
Status History	The Status History tab displays the history of statuses that a particular Adjustment has had in date descending order (most recent status on top).

Create a New Rate/Title Adjustment

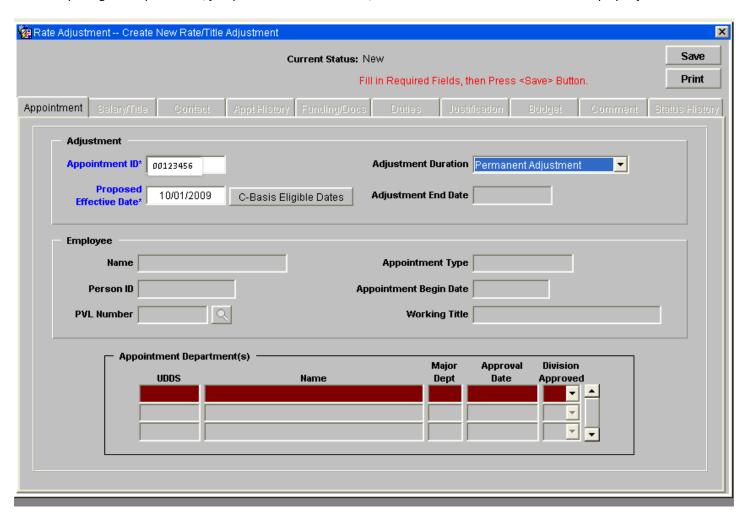If < Create a New Rate Adjustment> is selected from the Main Menu Screen, the above screen is displayed.

Note that there are three sections to the Appointment Tab. **ONLY THE ADJUSTMENT SECTION NEEDS TO BE COMPLETED. When the completed information from the "Adjustment" section is saved, the rest of the fields will automatically populate.**

Adjustment	Data required for the initial <Save> for this adjustment.
Employee	'Employee' section displays appointment data from the IADS system. Note that the Appointment data is not modifiable from the Rate/Title Change System.
Appointment Department(s)	'Appointment Department' section lists the person's current appointment department(s) and identifies the Major Department. This is data pulled from IADS. If the data is incorrect or out of date, the data in IADS should be corrected. Once corrected, the Rate/Title Adjustment system will pull in the new data from IADS. This is also the place where Divisions/Departments indicate approval of the Adjustment. All Divisions/Departments must approve the Adjustment prior to the Adjustment's status getting upgraded to Division Approved.

Note that fields marked with an asterisk (*) are those fields that require data for the initial <Save>.

'New' Rate/Title Adjustment cont'd.

After completing the required data, just prior to the initial <Save>, the Screen will look similar to the one displayed just below.
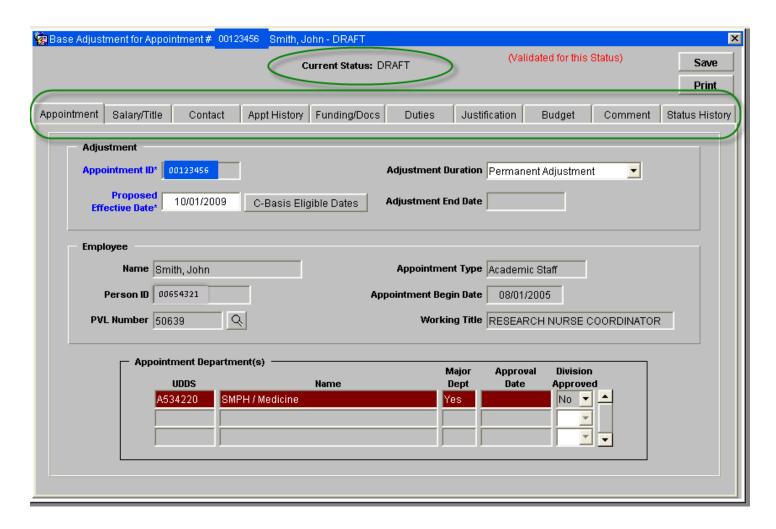

Appointment ID*	Enter the appointment ID of the person for whom the Adjustment is being made.
Proposed Effective Date*	**MM DD YY**. Enter "-" or "/" or space between months/day & year. A-Basis = Effective the first day of a month. C-Basis = Effective on the payroll pay period. For C-Basis, if you are unsure of which dates can be used as Effective Dates, press the adjacent button, "C-Basis Eligible Dates", to get a list of C-Basis dates The effective date has to be today's date or any date in the future. If the effective date is a date that has already passed, then use the "Comments" tab to record the date and the reason for using a past date.
Adjustment Duration	The choices in this list are: Permanent Adjustment (default) Temporary – no end date set Temporary – end date set (If this is selected, then you will be required to supply an Adjustment End Date prior to Department Approval.)

Note that fields marked with an asterisk (*) are those fields that require data for the initial <Save>.

Draft Status

Upon pressing the <Save> button for the new Rate/Title Adjustment for the first time, the system will create a Rate/Title Adjustment record in Draft status. All tabs on the screen will then become navigable (no longer grayed out). Note that the Appointment ID field is no longer modifiable after the initial Save. If the wrong Appointment ID had been entered into the field, you must begin a new Adjustment (an adjustment record can be deleted while still in Draft status by selecting 'Delete RA' in the Edit menu).

At this time, if the PVL Number field has been populated, and the PVL number is greater than 35000, the adjacent button can be used to navigate to the PVL for which this person had been recruited.

Salary/Title Tab

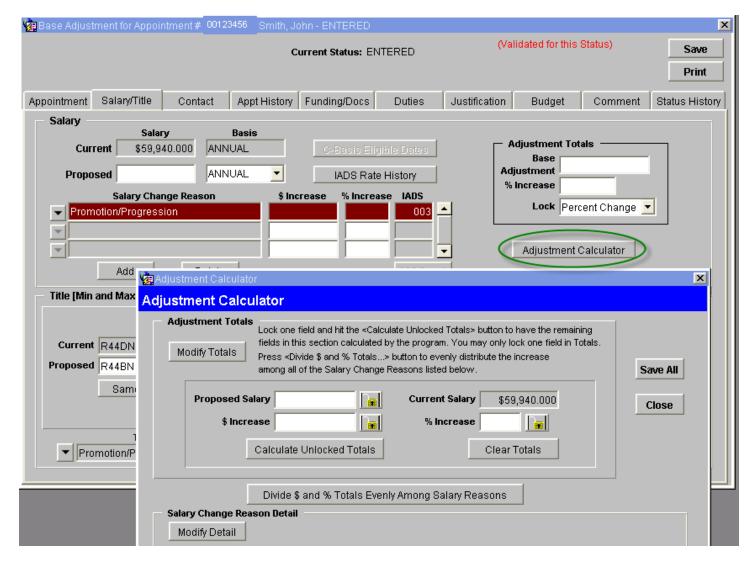| 1	**Proposed Salary**	You may either enter the Proposed Salary here, if known, or use the Adjustment Calculator to run calculations and have the program transfer the calculated Proposed Salary to this field.
2	**Proposed Salary Basis**	The default is the Current Salary Basis. Modify as needed. Valid Values are: • Academic • Annual • Hourly If you are changing the current salary basis, you may use the "Salary Basis Conversion Calculator" to help you convert the amount from one salary base to the other. You will find this by clicking on "Tools" in the pull down menu and then "Salary Basis Conversion Calculator" (see instructions on the page titled 'Helper Screen: Salary Basis Conversion calculator).
3	**Salary Change Reason**	Select the appropriate Salary Change Reason(s) from the list using either the <Add> button or the down arrow button adjacent to the field. The list is context sensitive. That is, the content of the list varies depending on the appointment's appointment type, title and the major appointment department.
4	**$ Increase**	Enter the appropriate Adjustment amount for the Salary Change Reason, or use the Adjustment Calculator to run calculations and have the program transfer the calculated amount. Note that the Amount may be a negative value, as in the case of a Temporary Adjustment End.
5	**% Increase**	Enter the appropriate Adjustment Percentage for the Salary Change Reason, or use the Adjustment Calculator to run calculations and have the program transfer the calculated amount. Note that the value may be a negative value, as in the case of a Temporary Adjustment End.
6	**Proposed Title Code**	If the title will not change, enter the same title code in the field, or press the <Same> button. If this is a new title, and the title code is known, enter the Title Code in the field, or press <Suggest> to get other titles in the same series, or the <Find> button for a list of all titles for the Employee's appointment type.

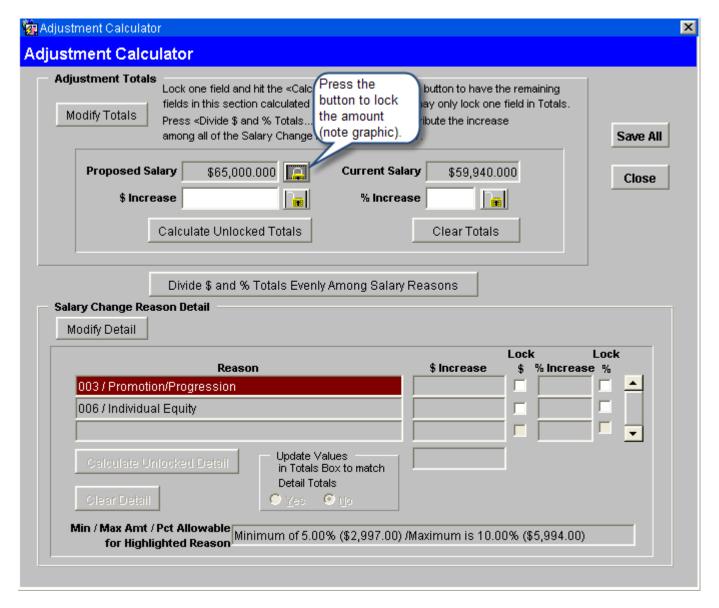| 7	**Title Change Reason**	If the title will change with this Adjustment, you must enter a Title Change Reason. The Title Change Reason must match one of the Salary Change Reason codes, if this is a Title and Salary adjustment (e.g. 03/003). The field is blank if the Title remains the same.
8	**Exceed Salary Max Pre Approved**	The option defaults to NO. The field is position specific and not title specific. Selecting YES is required only when the department wishes to use a pre-approved salary that is above the category "A" salary maximum. If set to YES, then the <Select> button is made available. Press the <Select> button to go to the screen that will allow you to choose a Pre-Approval record to support the higher market range. You must make a selection if the field is set to YES. **Yes** = Has a pre-approved extraordinary salary range. **No** = Does not have a pre-approved extraordinary range.
9	**Request to Exceed Salary Maximum**	The option defaults to NO. The field is position (not title) specific and is required only when there is a request to pay above the maximum of the salary range or above the ESG-6 rate. **Yes** = request for a new extraordinary salary range. *You must submit market* *data to support your request.* **No** = Proposed salary max is within the range.
10	**Adjustment Totals Base Adjustment**	Enter the total base adjustment amount. The Base Adjustment amount is the Proposed (#1) salary minus Current salary (in dollars).
11	**Adjustment Totals % Increase**	Enter the total percent increase. If there is more than one reason for the increase, this figure should be the total sum of all the change reason percentages.
12	**Adjustment Totals Lock**	Indicate which value to Lock in, the Percent or Dollar amount of the Adjustment. This would be of value when the base adjustment is affected by the merit exercise.
13	**UPPP10.1**	If pressed, will open a new browser window and display Chapter 10 of the Unclassified Policies and Procedures.
14	**UTG**	If pressed, will open a new browser window and display the Unclassified Title Guideline. This will assist you in viewing the UW-Madison prefix criteria and title definition.

Adjustment Calculator Screen

Use the <Adjustment Calculator> button on the Salary/Title tab to access the Adjustment Calculator screen.

If you haven't yet calculated the Proposed Salary amount/percent and the breakdown of salary changes for each Salary Change Reason, this screen may help you find those values. This screen contains no required fields, so it is not mandatory that you use it. In fact, the data on the screen is not saved by default. You must press the <Save All> button in order to save the data. Note that, if you press the <Save All> button, the system will write the results from Calculator to the Adjustment, replacing any data you may have entered in the same fields as they appear on the Salary/Title tab. You may <Close> the screen without saving your calculations, if you wish to ignore the values on the Calculator.

How the Adjustment Calculator Works

The top portion of the screen is used to calculate changes to the 'Totals' fields on the Adjustment. The bottom portion of the screen is used to calculate the amounts and percent changes for each Salary Change Reason. You must select which portion of the screen to work on (top or bottom). You cannot modify both at the same time.

If I wish to start with calculating the Totals, for example, one can do as follows. Say I am targeting a Proposed Salary of $65,000 for this appointment; I would enter that amount into the Proposed Salary field. In order to calculate the Amount Increase and Percent Increase fields for the total, I would then need to 'Lock in' the Proposed Salary (see above—the 'Lock' button has been pressed for the Proposed Salary field). After pressing the <Calculate Unlocked Totals> button, the system will fill in the '$ Increase' and '% Increase' fields. The result would be as shown below.

How the Adjustment Calculator Works cont'd.

Adjustment Calculator

Adjustment Totals

Lock one field and hit the <Calculate Unlocked Totals> button to have the remaining fields in this section calculated by the program. You may only lock one field in Totals. Press <Divide $ and % Totals...> button to evenly distribute the increase among all of the Salary Change Reasons listed below.

Modify Totals

Proposed Salary	$65,000.000 🔒	Current Salary	$59,940.000
$ Increase	$5,060.000 🔒	% Increase	8.442 🔒

Calculate Unlocked Totals   Clear Totals

Save All   Close

Divide $ and % Totals Evenly Among Salary Reasons

Salary Change Reason Detail

Modify Detail

Reason	$ Increase	Lock $	% Increase	Lock %
003 / Promotion/Progression		☐		☐
006 / Individual Equity		☐		☐
		☐		☐

Calculate Unlocked Detail

Update Values in Totals Box to match Detail Totals
○ Yes   ● No

Clear Detail

Min / Max Amt / Pct Allowable for Highlighted Reason Minimum of 5.00% ($2,997.00) /Maximum is 10.00% ($5,994.00)
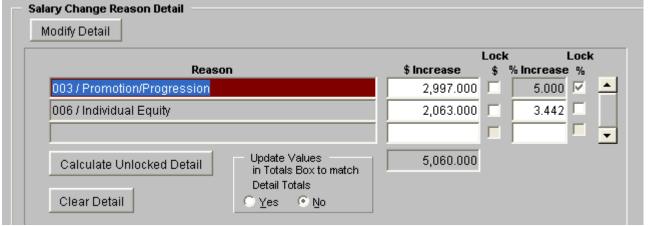
I can then choose to divide the amount evenly between the two Salary Change Reasons using the <Divide $ and % Totals Evenly Among Salary Reasons> button. Instead, I have decided to assign 5% of the 8.442% total to the Promotion salary change reason and the remainder to Individual Equity. In order to do this, I press the button <Modify Detail>, which will allow me to work in the lower portion of the screen (see below).

How the Adjustment Calculator Works cont'd.

Step 1: Press the <Modify Detail> button to make the fields in the Salary Change Reason Detail section available for entry.
Step 2: Enter a '5' in the percentage field on the Promotion reason line and click on the adjacent checkbox in order to lock in the 5%.

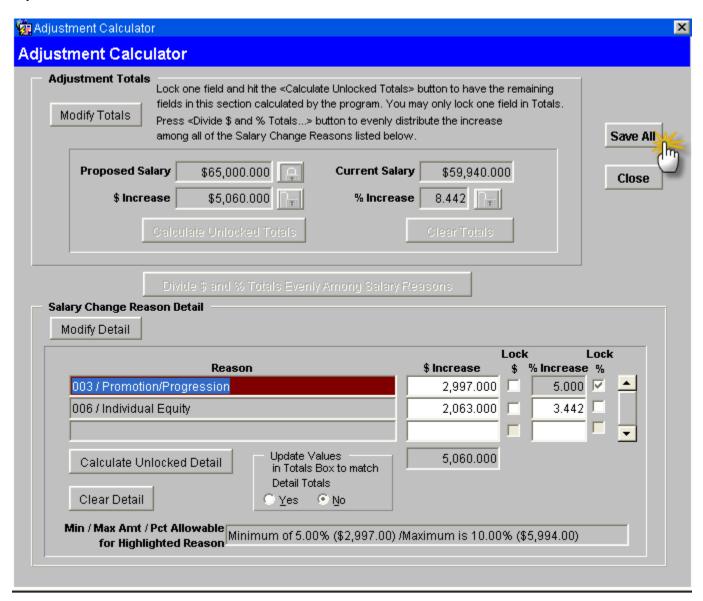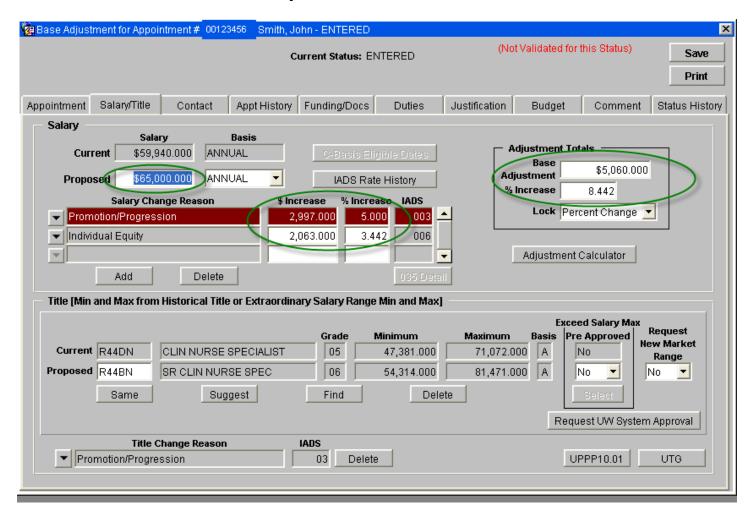**Step 3**: Press the <Calculate Unlocked Detail> button to get the following values:

The program has filled in the dollar amounts for each reason and the remainder of the percent increase for the additional Salary Change Reason.

How the Adjustment Calculator Works cont'd.

If I am satisfied with the values I now have, I can press the <Save All> button to transfer the numbers to the appropriate fields on the Adjustment record.

Adjustment Calculator

Adjustment Calculator

Adjustment Totals

Lock one field and hit the <Calculate Unlocked Totals> button to have the remaining fields in this section calculated by the program. You may only lock one field in Totals. Press <Divide $ and % Totals...> button to evenly distribute the increase among all of the Salary Change Reasons listed below.

[Modify Totals]

[Save All]

[Close]

Proposed Salary	$65,000.000 🔒	Current Salary	$59,940.000
$ Increase	$5,060.000	% Increase	8.442

[Calculate Unlocked Totals]   [Clear Totals]

[Divide $ and % Totals Evenly Among Salary Reasons]

Salary Change Reason Detail

[Modify Detail]

Reason	$ Increase	Lock $	% Increase	Lock %
003 / Promotion/Progression	2,997.000	☐	5.000	☑
006 / Individual Equity	2,063.000	☐	3.442	☐
		☐		☐

[Calculate Unlocked Detail]

Update Values in Totals Box to match Detail Totals
○ Yes ● No

5,060.000

[Clear Detail]

Min / Max Amt / Pct Allowable for Highlighted Reason Minimum of 5.00% ($2,997.00) /Maximum is 10.00% ($5,994.00)
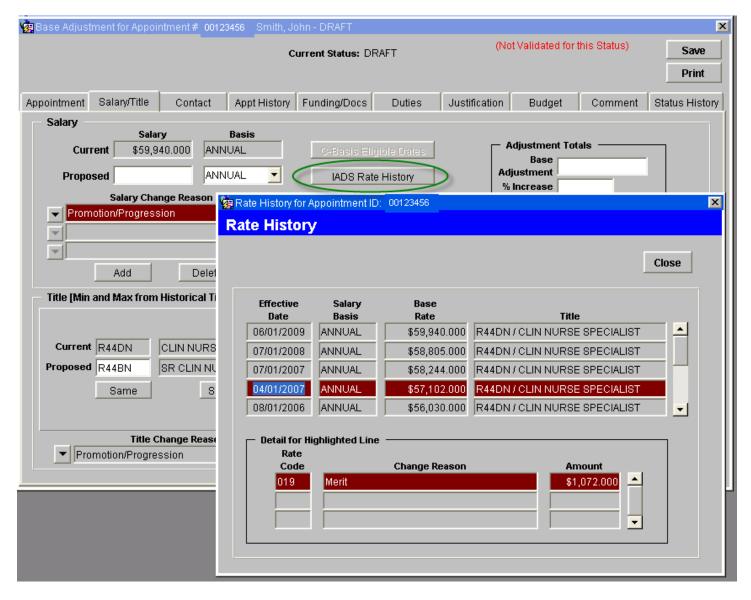
How the Adjustment Calculator Works cont'd.

The numbers are now transferred to the Adjustment record. (Note that, if I had numbers that had been saved in an earlier session, they have now been written over.)
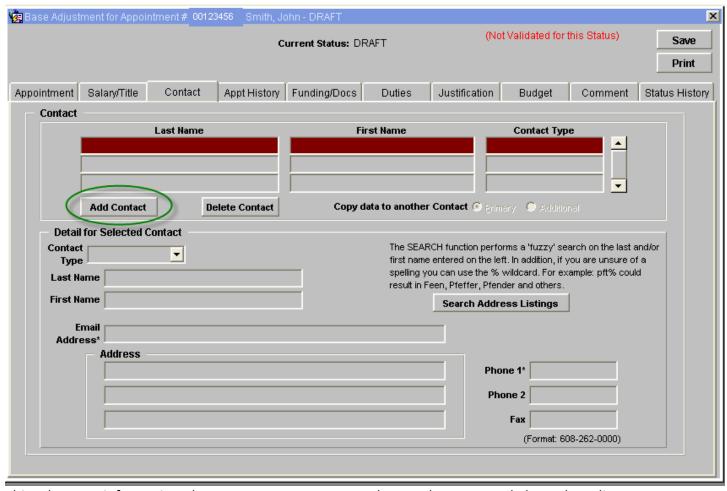
If, later, I discover a problem with the numbers (e.g., I need to allocate more to Individual Equity), when I next press the <Adjustment Calculator> button, the program will load the Calculator with the values I have saved on the Adjustment. I can use these existing values as a point of departure for making the adjustments to my original calculations.

Appointment Rate History Screen

If the <IADS Rate History> button is pressed, you can see all of the Rate changes to date for the Appointment ID entered on the Appointment tab (including Merit). The upper scrolling region has the rate change summary by date. The lower scrolling region displays detail for the rate change selected in the upper scrolling region. For example, if more than one Rate Change Reason was applied on that date, the detailed breakdown of Rate Reason and Amount shows in the Detail box.

Contact Tab

This tab stores information about one or more persons who may be contacted about the Adjustment.

Press the <Add Contact> button to open up the entry fields in the bottom portion of the screen.
One Primary contact is required. Additional contact is not required. You may have any number of Additional Contacts listed.
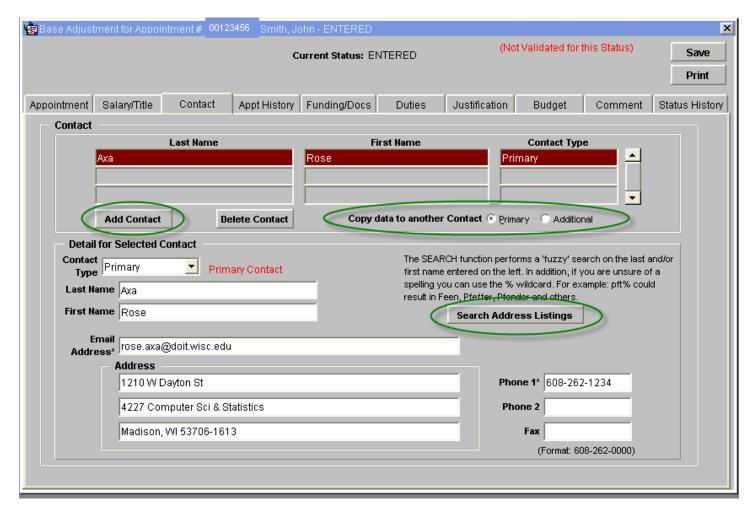
Contact Last Name*	**Primary Contact**: The primary person to be contacted regarding the Adjustment. **Additional Contact**: Name of a secondary contact (optional).
First Name*	First name.
Address	Address is not a required field.
Phone*	Area code defaults to 608. . Enter "-" between the third and the fourth number e.g. 263-2511.
Fax	Optional
Email Address*	E-mail address of the Primary Contact (required).

Press the <Done> button when entry is completed.
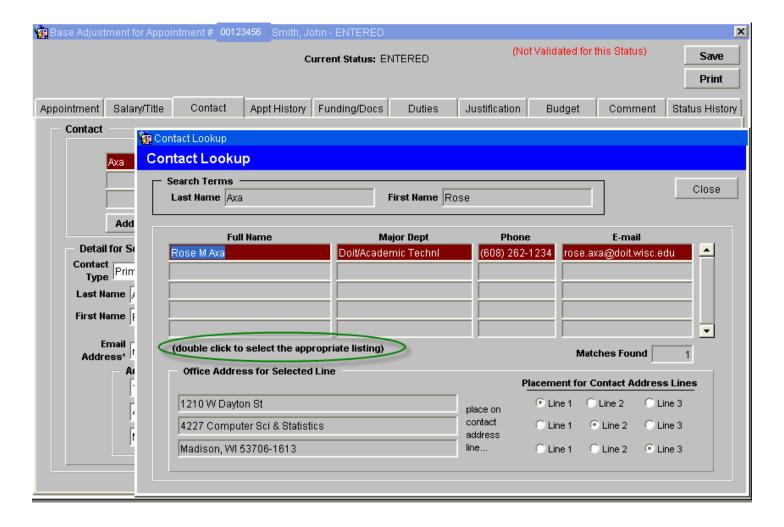
Contact Tab cont'd

At this point, you can either add another contact, or copy the data entered to another Contact Type (for example, if the same person fulfills more than one contact position, simply use the copy radio buttons to create the new contact record with the same contact person data as the record already entered.).

<Search Address Listings> button: If the Contact's address, phone number and/or email address is not known, enter the Contact's Last and First name in the Contact fields and press the <Search Address Listings> button. The system will search the Directory system for Address/Phone/Email data on the person specified.
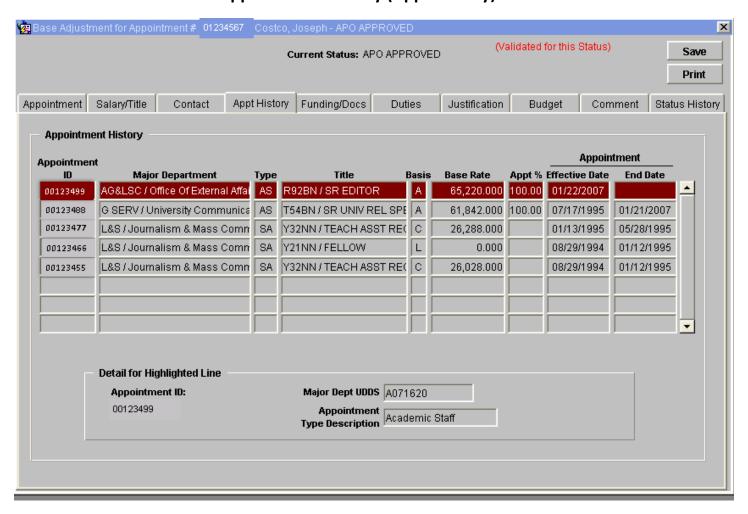
Find Contact Data (Address/Phone/Email)
In the Directory System
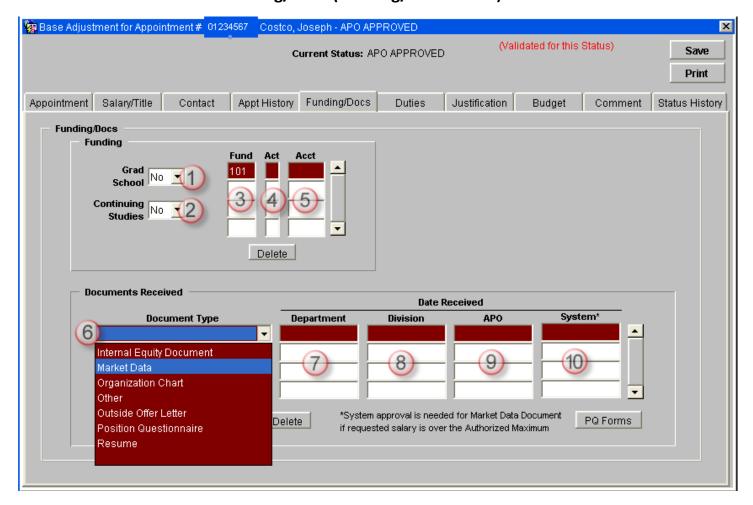
<Search Address Listings> cont'd:

Double click on the appropriate record to transfer the data to the Contact record.

Appointment History (Appt History) Tab

The Appointment History Tab displays a history of the Employee's appointments with the UW in summary form. This data is drawn from the IADS system.
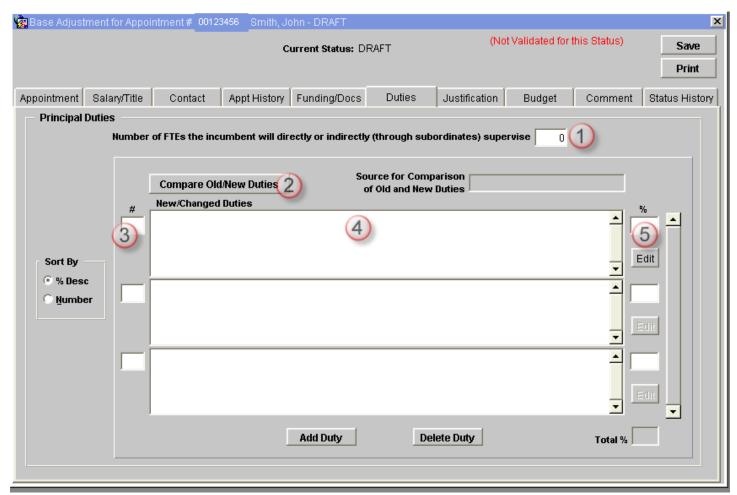
Funding/Docs (Funding/Documents) Tab

Indicate the funding sources for the rate change. If additional documentation is needed to support the Rate and/or Title change, the appropriate document type must be selected and the date received at the various offices must be noted.

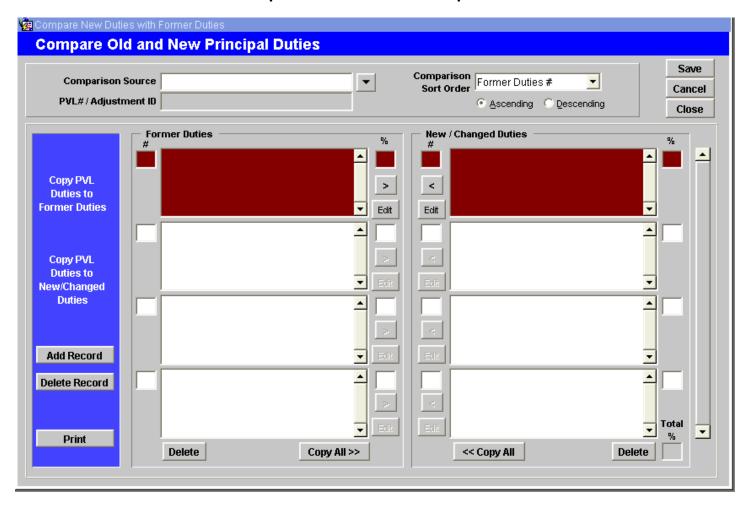|		
1	**Funding: Grad School**	The option defaults to NO. Indicate "Yes" if the position has Graduate School funding.
2	**Funding: Continuing Studies**	The option defaults to NO. Indicate "Yes" if the position has Continuing Studies funding.
3	**Fund**	Type of funds e.g. 101. 133. 144
4	**Program Code**	Program code, which include: 0-Student Services 1-Instructional Support 2-Instruction 3-Hospitals 4-Research 5-Public Service 6-Academic Support 7-Physical Plant 8-Auxiliary Enterprises 9-Financial Aid F-Farm Operations
5	**Account**	Account number
6	**Document Type**	Select the appropriate Document Type from the drop down list.
7	**Date Received: Department**	Indicates the date the document was received by the departmental office.
8	**Date Received: Division**	Indicates the date the document was received by the division office.
9	**Date Received: APO**	Indicates the date the document was received by APO.
10	**Date Received: System**	Indicates the date the document was received by UW System (only applies to Market Data)

Principal Duties (Duties) Tab

Whenever you use the following rate change reasons, and if former duties are not already in the Rate/Title Change System, you have to provide both the former and the current duties. Although percentage breakdown is strongly encouraged for Former Duties, it is a requirement for the Current Duties.

001 – Change in duties
025 - Temporary
030 - Due to Title Appeal
031 – Activate Rate (former duties is not required)
053 – Board Attainment
054 – New title assignment (by UW System)

PLEASE ENTER DUTIES IN THE "COMPARE OLD/NEW DUTIES" SCREEN-NOT THE SCREEN SHOWN ABOVE. The above screen will automatically populate when you fill in the information on the "Compare Old/New Duties" screen.

1	**Number of FTEs Supervised**	Number of FTE the employee supervises both directly and indirectly (through subordinates)
2	**Compare Old/New Duties**	Use the "Compare Old/New Duties" button to navigate to the "Compare Old and New Principal Duties" screen. If Principal Duties are required for the submission of the Adjustment, you must first complete the "Compare Old and New Principal Duties" screen.
3	**#**	Line number to identify the individual duty **This information will automatically populate from the "Compare Old/New Duties" screen.**
4	**New/Changed Duties**	Describe the principal duties and responsibilities of the position (including new duties and changes in/additional responsibilities). **This information will automatically populate from the "Compare Old/New Duties" screen.**
5	**%**	Indicate what portion of the job, each individual duty comprises (the percentages should total to 100%). **This information will automatically populate from the "Compare Old/New Duties" screen.**

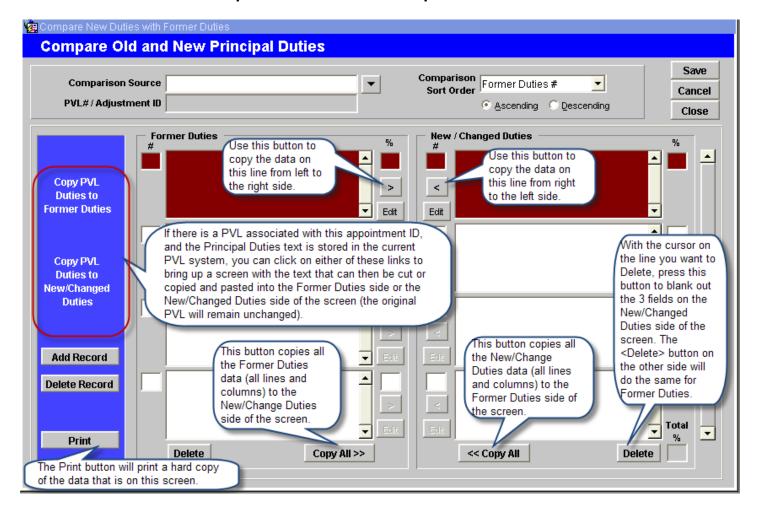# Compare Old and New Principal Duties

If Principal Duties are required for the submission of the Adjustment, you must also complete the Compare Old and New Principal Duties screen (as shown above).

The left hand section of the screen (labeled '**Former Duties'**) should list, in itemized form, the employee's former duties (the source for this can be the PVL the person had been hired under, a prior Rate/Title Change or any other document that had been filed with the APO office describing the position). The right side of the screen, labeled '**New/Changed Duties**' should indicate what had changed (the duty itself or the proportion of time the duty occupies for the position (the percentage).

If the "Former Duties" side is blank, start completing this section first, numbering each line and assigning a percentage for each duty.

Then, use the arrow button (they look like this ⟩ , ⟨) pointing to the right side to move the duties that the person is still performing to the "New/Changed Duties" column. If there is a change in that section, indicate what changed, if anything (the duty itself or the percentage of the position) on the "New/Changed Duties" side. If the duty is no longer performed, you may leave the #/duty/% fields blank.

Note that Spell Check is available on all of the large text fields including Duties (right click to get Spell Check from the floating menu).
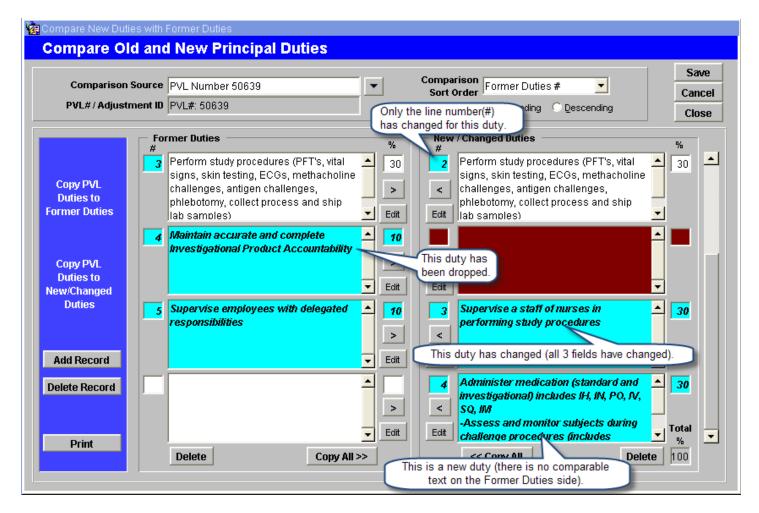
Compare Old and New Principal Duties cont'd.

Above is an explanation of some of functionality you will find on the screen. In addition to the above, we have:

Add Record Button	This button will add a new line on the bottom (both left and right sides of screen).
Delete Record Button	This button will delete an <u>entire</u> line of data (both left and right sides – i.e. the Former Duties side and the New/Changed Duties side). Note that you must have the cursor on the line you wish to Delete, before hitting the button.
Comparison Sort Order	You may sort the data on the screen using any of the following four fields: Former Duties # (sequence number) New/Changed Duties #(sequence number) Former Duties % New/Changed Duties %
Ascending/Descending	Use these buttons to further refine the Comparison Sort Order either from lower number to highest or vice versa.

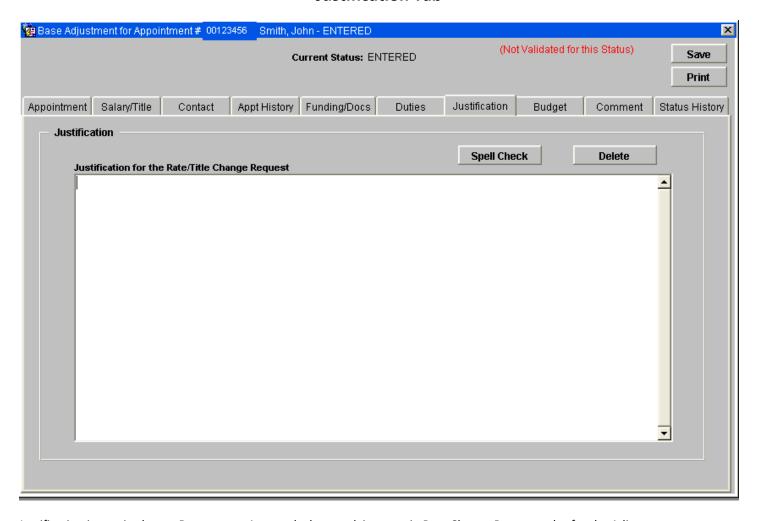# Compare Old and New Principal Duties cont'd.

Upon saving changes, the program will color the changed data with a teal background (see above sample). In the above example, the person's duties had shifted so that some were no longer performed (hence the numbering change), one duty had been expanded to encompasses a greater share of the person's time and the duty itself had changed to encompass more responsibility.

Comparison Source	Indicate the source for the Former Duties, or select from the drop down list.
Former Duties - #	Each duty should be numbered sequentially.
Former Duties - Duty	State each duty in outline format
Former Duties - %	Indicate the proportion of time spent for each duty in percentage format
New/Changed Duties - #	Each duty should be numbered sequentially. If the duty field is left blank (because it is no longer performed), then the # field should be left blank.
New/Changed Duties - Duty	State each duty in outline format. If the corresponding Former Duty is no longer performed, then the Duty field can be left blank. If changed, then describe how it is currently performed.
New/Changed Duties - %	Indicate the proportion of time spent currently for each duty in percentage format

If there are additional duties that have been added to the person's position, with no corresponding 'Former Duty', then use the <Add Record> button to add new records to the right portion of the screen with the appropriate data. The left portion of the screen (the Former Duties column) can be left blank.
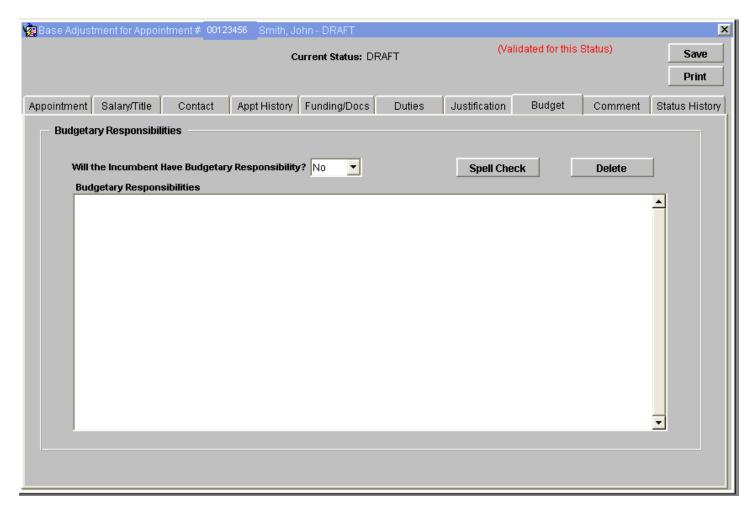
Justification Tab

Justification is required upon Department Approval when applying certain Rate Change Reason codes for the Adjustment.

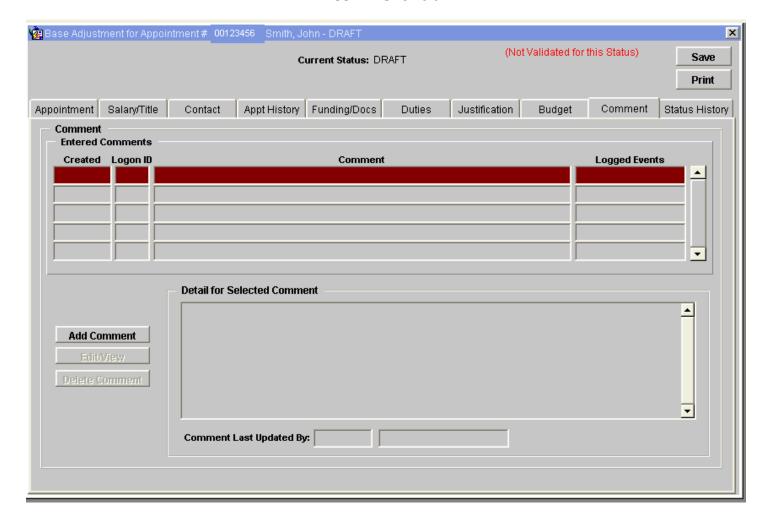| Justification for the Rate/Title Change Request	Indicate, in the space provided, justification supporting the rate/title change request.

Budgetary Responsibility (Budget) Tab

Budgetary Responsibility is required upon Department Approval when applying certain Rate Change Reason codes for the Adjustment.

Will the Incumbent have Budgetary Responsibility	Yes/No, as appropriate, if the person will have budgetary responsibility.
Budgetary Responsibilities	If the budget responsibility is "Yes", list in detail the specific budgetary responsibilities the incumbent will have.

Comment Tab

This tab is for comments associated with the Adjustment. Only the creator or APO staff may update a comment entered here.

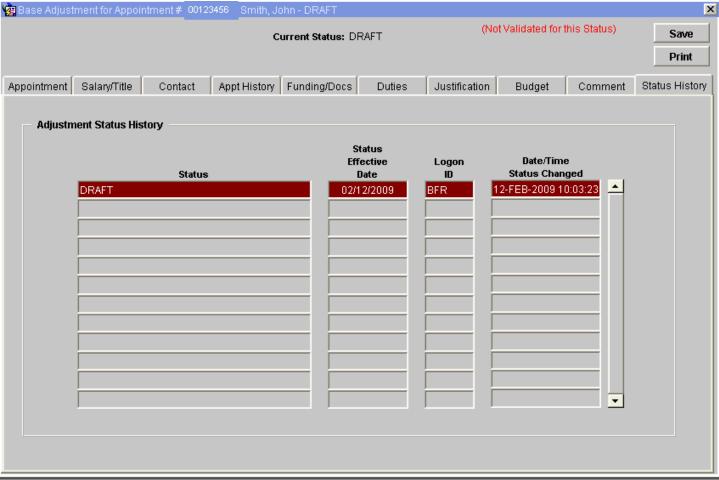Also listed on this tab are system generated Comments (called Events).

Existing comments are displayed in order by Create Date with the most recent Comment on top.

To **CREATE** a Comment: Press the <Add Comment> button. To **UPDATE** a Comment: Place the cursor on the Comment record you wish to change in the first half of the screen (the background color of the record will be dark red) and press the Edit/View button.

To **DELETE** a Comment: place the cursor on the Comment record you wish to change in the first half of the screen (the background color of the record will be dark red) and press the <Delete Comment> button.
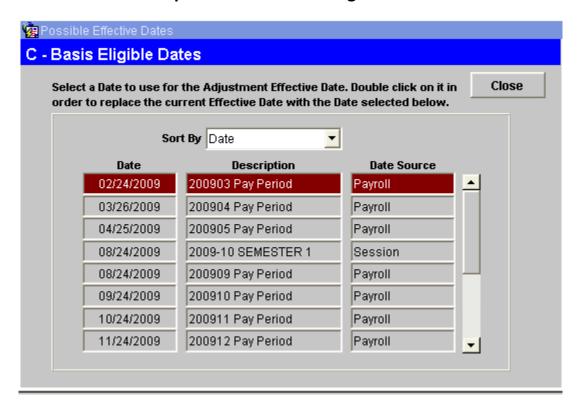
Only the person who created the comment may update or delete his or her own comment.
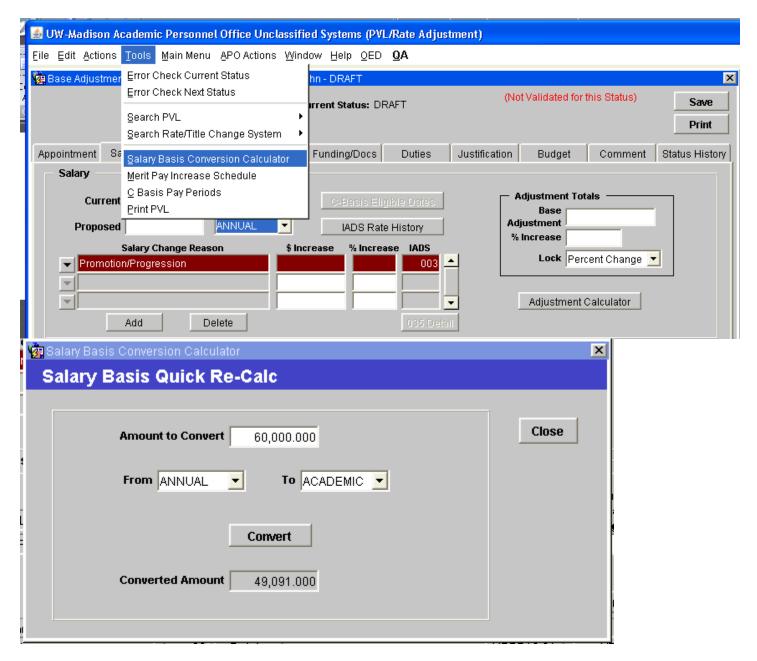
Status History Tab

The data on this tab is not modifiable. It displays the history of statuses that a particular Adjustment has had. Anyone with update or view access can view the status history of an Adjustment. The statuses are displayed with the most recent status on the top line by status effective date (MM/DD/YYYY).

Helper Screen: C- Basis Eligible Dates

Possible Effective Dates

C - Basis Eligible Dates

Select a Date to use for the Adjustment Effective Date. Double click on it in order to replace the current Effective Date with the Date selected below.

Close

Sort By | Date

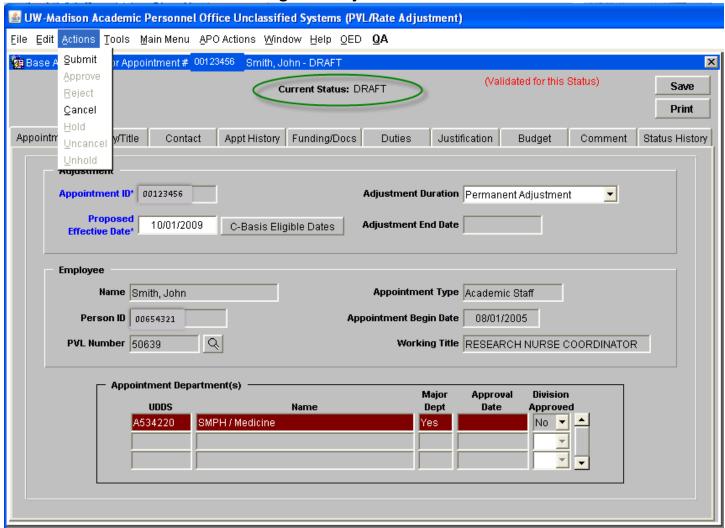| Date	Description	Date Source
02/24/2009	200903 Pay Period	Payroll
03/26/2009	200904 Pay Period	Payroll
04/25/2009	200905 Pay Period	Payroll
08/24/2009	2009-10 SEMESTER 1	Session
08/24/2009	200909 Pay Period	Payroll
09/24/2009	200910 Pay Period	Payroll
10/24/2009	200911 Pay Period	Payroll
11/24/2009	200912 Pay Period	Payroll

This screen is available when pressing the button <C-Basis Eligible Dates> on the Appointment tab and the Salary/Title tab (on the Salary/Title tab it is only available if Current or Proposed Salary Basis is Academic (C – Basis). The screen lists the C – Basis Payroll dates. You can double click on a record to populate the Adjustment Effective date with a date on the list.

Helper Screen: Salary Basis Conversion Calculator

From the Tools Menu, you can access the Salary Basis Conversion Calculator. The screen will translate an entered amount from one Salary Basis to another.

Change the Adjustment's Status

Use the ACTIONS portion of the menu to modify the Status of the Adjustment.

Actions/Submit	Used to move the Adjustment from Draft to Entered status
Actions/Approve	Used to move the Adjustment from Entered to Department Approved status. Also used to move the Adjustment from Department Approved to Division Approved status (program checks to see the current status to determine which of the 2 statues is appropriate.
Actions/Reject	Used to move the Adjustment to a prior status (e.g., from Dept Approved to Entered).
Actions/Cancel	Used to Cancel further work on a Adjustment.
Actions/Hold	Used to temporarily suspend work on the Adjustment.
Actions/Uncancel	Used to place the Adjustment in the status it had just prior to the Cancellation so that work on the Adjustment may resume.
Actions/Unhold	Used to remove the Hold on the Adjustment so that work on it may resume.

When an Action is selected the Adjustment data is checked for completeness and integrity. If no errors exist, a "successful" message appears indicating the status has been changed. Note that the "Current Status "display is modified to reflect the new status.

Change the Adjustment's Status cont'd.

Full list of Statuses:

- Draft
- Entered
- Department Approved
- Division Approved
- Division Hold
- APO Approved
- APO Hold
- Auth Rate Adjustment (Authorized for entry into IADS)
- Finished – Payrolled (having been entered in IADS). This is a system-assigned status.
- Revised
- UW System Review (awaiting UW System Review)
- Cancelled

Note that the Department may not modify the Adjustment after the Adjustment is Department Approved (which effectively forwards it to the Division for further approval) and the Division cannot modify the Adjustment after it is Division Approved and submitted to APO for further review.
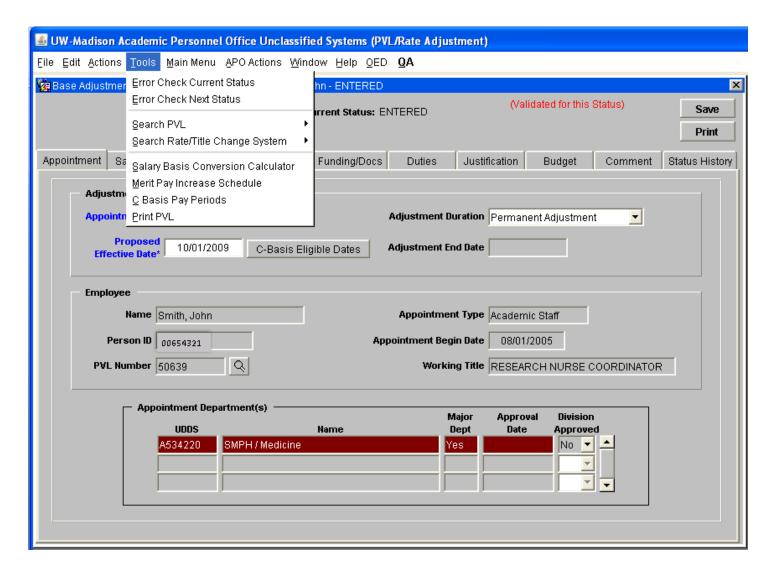
Error(s) Window

If errors were found when you attempted to change the Adjustment's status, an Error window will display with:

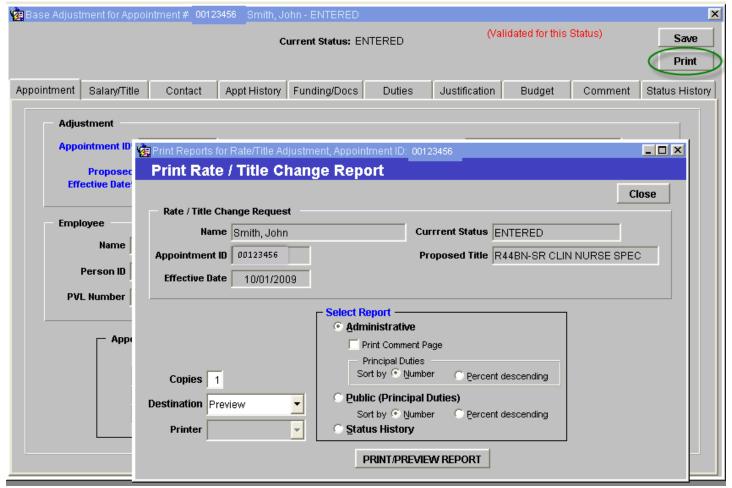|	
1	The status for which the Adjustment was validated
2	The number of Errors
3	The Error Message and, adjacent to it, the Actions needed to remediate the error.
4	A <Go To Error> button that will take you to the field needed to correct the error.

Tools Menu

If you wish to check the Adjustment for errors without having to change the status of the Adjustment, use the TOOLS Menu. From the TOOLS menu you can check for Errors at the Current Status or for the next status that would advance the Adjustment, e.g., from Draft status, you can validate the Adjustment for Entered status without changing the Adjustment's status to Entered.

Note that, if you are in Edit mode, the Adjustment is validated for whatever the current status may be when you close out the record. On closing out the Adjustment, if you get a list of errors which are "Critical" or "Informational", you may still exit the Adjustment without correcting the data. However, the errors must be corrected if you wish to move the Adjustment to the next level.

Printing an Adjustment

ADOBE ACROBAT READER installation is needed to be able to print a report from the Rate/Title Change system.

The <Print> button in the Adjustment's upper right corner can be used to access the Print Rate/Title Change Reports screen. On the Print Rate/Title Change Reports screen, select which report you wish to print and then press the <Print/Preview Report> button. Note that the default is to <u>not</u> print the Comments portion of the Administrative report. If there are Comments associated with the Adjustment, and you wish to print the Comments page, you must check 'Print Comment Page'.
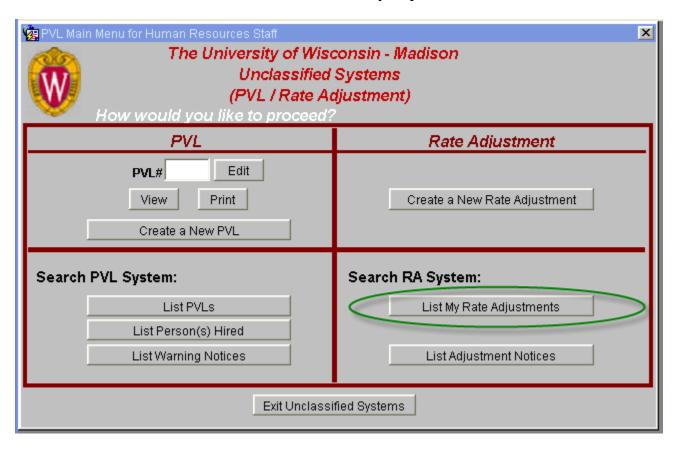
You must have your browser set to accept Pop-ups from this site in order to print from the system. After pressing the <Print/Preview Report> button, the system launches Adobe Acrobat and the report appears in a separate window. From this window, you may then send the report to your local printer, if a hard copy is needed, or you can choose to save the PDF.

Only one Adjustment may be printed at a time

Available reports:
- Administrative – Detailed data regarding the Adjustment.
- Public – Very brief data regarding the appointment, including the person's name, appointment ID, principal duties.
- Status History – a list of the statuses and their dates for the Adjustment.

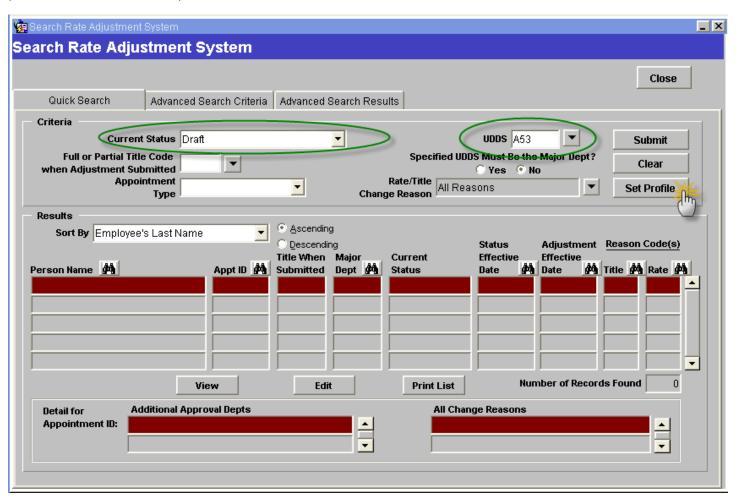# How to 'Find My Adjustments'

Use the <List My Rate Adjustments> button on the Main Menu screen to access your Rate/Title Change records. This will take you to the Search Rate Adjustment screen.
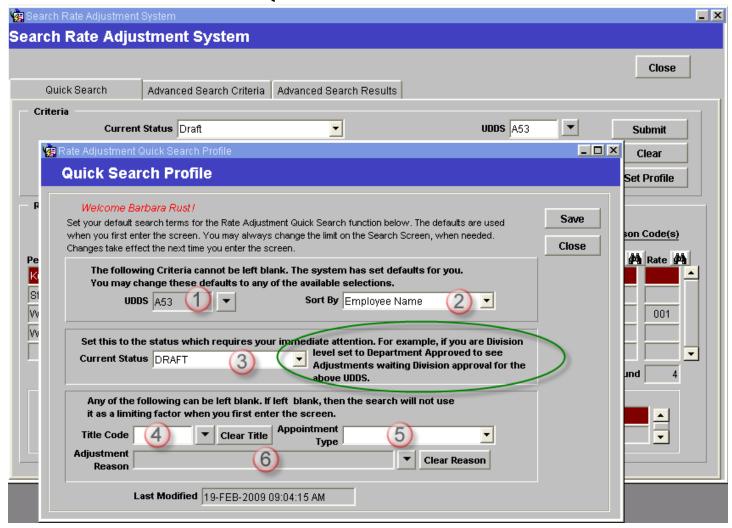
List My Rate Adjustments

The first time you log into the Rate/Title Change system you are given a default Search profile. The default search profile is composed of your UDDS authorization (or one of your UDDS authorizations, if you have more than one) and a 'Current Status' of 'Draft'. Your Search Profile is loaded into the Search Rate Adjustment Quick Search Criteria when you invoke the screen. If there are Adjustments in the system at the time for your UDDS and in Draft status, you will see them listed in the Results in the second portion of the screen. If there are no records in that status and UDDS, you will receive the message that 'No Records Were Found'.

However, since I am Division level, I would prefer to see only Department Approved Adjustments when I first come into the system as those are the records I need to attend to first. In order to change my profile, I will press the <Set Profile> button and create a profile that is more suited to my needs.
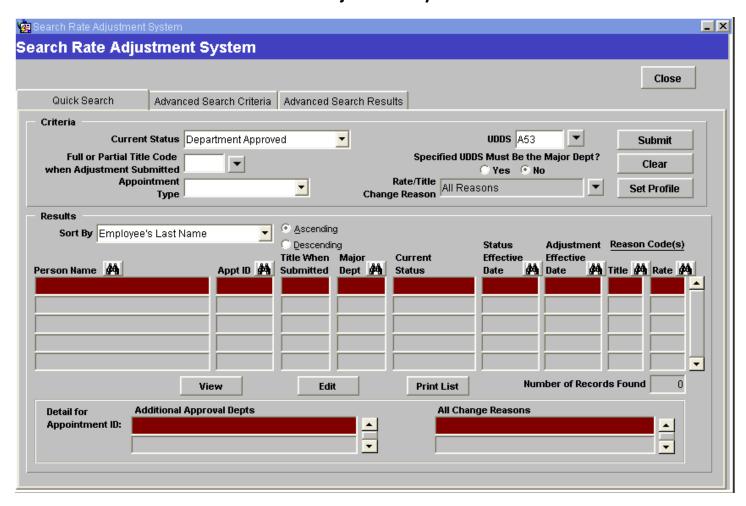
Quick Search Profile Screen

In the Quick Search Profile Screen one can customize the following fields on the Quick Search Tab:

1	UDDS	If you are authorized for more than one UDDS, you may select which UDDS will be your default UDDS when you first navigate to the screen.
2	Sort By	You can set the default sorting for the Quick Search Results. The initial default is set to Employee Name in Ascending order
3	Current Status	Set this value to the status that would require your immediate attention when you first come into the system. You can select the blank line (the last selection on the list). If you select the blank line, you will get all statuses for your UDDS, i.e., all Adjustments regardless of Current Status.
4	Title Code	You may limit the Quick Search to a specific title code or portion thereof (e.g. 'R04').
5	Appointment Type	You may limit the Quick Search to a specific Appointment Type. For example, if you mainly work on Adjustments for Academic Staff, you may not want to see Faculty Adjustments by default.
6	Adjustment Reason	You may limit the search to scan only for a specific Adjustment Reason code. For example, if you only work with Promotions, you may want to limit yourself to Adjustments having a 003 Reason code associated with it.

Search Rate Adjustment System Screen

Note that the new profile will not take effect until you press the <List My Rate Adjustments> button again.

I have chosen to modify my profile to default the Current Status to Department Approved, but decided to not modify any of the remaining defaults. Therefore, the next time I pressed the <List My Rate Adjustments> button again the Search screen will appear as above. No Adjustments met my criteria at present, so there are no Adjustments in the list.

The profile one sets on the Quick Search Profile screen is loaded into the screen when you first navigate to the screen from the Menu. When you first invoke the screen, it will perform an initial scan of Adjustments to see if any conform to the default criteria. However, once on the screen, you can modify any of the Criteria on the Quick Search tab as needed to search for Adjustments with the Criteria you specify.

Quick Search Criteria/Options

UDDS	Enter a full or partial UDDS code(s). This field may not be left blank.
Current Status	If you want to see only a specific status as of today, select a specific current status **DR** = Draft **EN** = Entered **TA** = Department Approved **DA** = Division Approved **DH** = Division Hold **AH** = APO Hold **AA** = APO Approved **PY** = Auth Rate Adjustment (Authorized for entry into IADS) **FI** = Finished – Payrolled (having been entered in IADS). **RV** = Revised **SR** = UW System Review **CA** = Cancelled **BLANK** will select all status
Appointment Type	**AS** = Academic Staff **FA** = Faculty **LI** = Limited Appointee **BLANK** will select all appointment types
Title Code	Specify a full or partial title code (e.g. E10 or E10FN). The Search will be performed on the Title the employee had at the time the Adjustment was initiated (not the new title that the Adjustment may have assigned).
Major Department	**Yes** = Select all Adjustments where the specified UDDS is the Major Department. **No** = Select all Adjustments where the specified UDDS is the Appointment Department.
Rate or Title Change Reason	Select a Change Reason code from the drop down list if you prefer to narrow the list with to Adjustments linked to a given Change Reason. The default search is for Adjustments regardless of the Rate or Title change reason(s) assigned to the Adjustment.
Submit	*Action*: - Press the <SUBMIT > button to get Results from your modified Criteria.
Results: Sort By and Ascending/Descending Buttons	After you've gotten your results, you may re-sort the list by any of the choices in the drop down list. You may also select Ascending or Descending order for any of the Sort orders. You do not need to re-Submit the query. The Results will immediately re-sort themselves based on your selection.
🔍	Use the buttons with the binoculars to quickly navigate to a specific record in the Results. For example, if the list is large, one can press the binocular button above the list of Names and you will get a list of all the names in the Results. When you select a person on the drop down list, the program will then place you on the line with that person's data.
View	Use the <View> button to navigate to the Adjustment in View mode.
Edit	Use the <Edit> button to navigate to the Adjustment in Edit mode.
Print List	Use the <Print List> button to bring up a screen that will allow you to create either a hard copy or an Excel Spreadsheet of the Results (you must have Excel on your desktop in order to generate a Spreadsheet.