WASHINGTON STATE UNIVERSITY

HEPPS
USER
MANUAL

(Higher Education Payroll / Personnel System)

Financial Management Track

Presenter: Alice Smethurst
                      Payroll Services
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HRS Employee Development

How the HEPPS System Works

<u>Course Objectives</u>

Upon completion of this course each participant will be able to:

- Explain the design concepts of the HEPPS System

- Explain how to navigate through the numerous screens.

How the HEPPS System Works

Table of Contents

Introduction

HEPPS stands for _Higher Education Payroll / Personnel System_.

The _HEPPS Inquiry System_ provides on-line inquiry to employment / budgeting data included in EMPLOYEE, APPOINTMENT, POSITION, ASSIGNMENT and ACCOUNT data entities. Inquiry is also provided for job classification, name search, I-9 information and other types of information.

Inquiry screens are arranged as "conversations". A conversation is a set of screens arranged in a logical sequence. There are two basic conversations:

- One is structured to provide information related to an **employee,** which includes appointments and related positions and assignments.

- The other provides information related to a **position,** which includes assignments and related appointments and employees.

The _HEPPS Inquiry System_ is designed to provide simple access for novice users and productivity enhancement features for expert users. Many people authorized to access information from the _HEPPS Inquiry System_ will be first-time or occasional users. All that is needed to get useful information from the _Inquiry System_ is a rudimentary understanding of the two basic inquiry conversation models and a data key (either an employee's social security number or a position number).

A person who regularly uses the _Inquiry System_ will soon develop a quick way to access the desired information. A simple **command language** is provided to allow immediate display of the requested information. The command language allows the user to request a conversation, provide the required data key, and identify the screen to be displayed, all in a single command. The command language provides the expert user a simple means to change screens within and between conversations. The user may display information for a series of employees or positions without having to exit to a menu or selection screen.

How to Get Access to HEPPS

A first-time user to any *Administrative Information System (AIS)* program must complete an authorization form to secure an ID to access AIS. (See Section 80.37.4 of the BPPM for specific instructions.)

Next, to secure access to HEPPS, an Access Request form must be completed. (See Section 80.33 in the BPPM for specific instructions.)

To gain access to DEPTPAY for the on-line input of positive pay hours worked and the review of payroll expenses, the user will need to do the following:

1 Submit an AIS User ID form if first-time user.

2 Submit a Secure Access form requesting access to HEPPS

3 Have an electronic mail address that is present in the electronic phonebook

4 Contact Payroll Services for training.

Although most of the data stored in the HEPPS System is "public" information and not subject to confidentiality standards, it is inappropriate to release any HEPPS information for non-University business. Individuals or organizations requesting employment information should go through the Public Records Officer.

Inquiry System Concepts

The *HEPPS Inquiry System* is designed to follow the data entity relationships established in the design of the HEPPS data base. Employees are appointed to positions; positions are assigned accounts.

Appointments define the relationship between employees and positions. Assignments define the relationship between positions and accounts.

| emp | → | apt | ← | psn | → | asgn | ← | account |
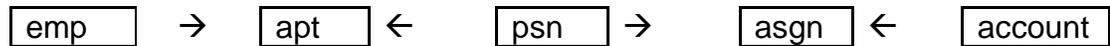
Figure 1 -- HEPPS Data Entity Model

The *HEPPS Inquiry System* is a collection of conversations connected by an inquiry menu. A conversation is a logical arrangement of a set of screens accessible in a fixed sequence or individually. Each screen in a conversation displays information from a HEPPS data entity (e.g., EMPLOYEE, APPOINTMENT, POSITION, ASSIGNMENT) or provides a means of identifying an employee or position for inquiry.

Six screens are used to build the basic conversations. These screens are identified in the system by the following names:

- ◆ SELECT   Select screen for the conversation *(this is where the employee or position is identified for inquiry)*

- ◆ EMP   Employee information screen

- ◆ APTSL   Appointment select screen

- ◆ APT   Appointment information screen

- ◆ PSN   Position information screen

- ◆ ASG   Assignment information screen

There are two basic conversation models. Figure 2 shows the model for accessing information related to an **employee**. Conversations using this model require an **employee SSN** for access.

| employee select | ----- | emp | ----- | aptsl | ---- | apt | ---- | psn | ---- | asg | ---- | account |
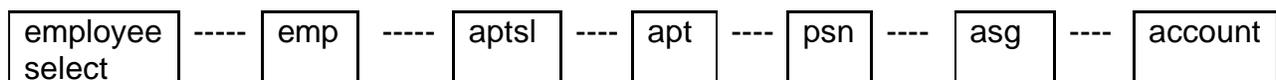
Figure 2 -- Model for Conversation Accessed by Employee SSN

Figure 3 shows the model for accessing information related to a **position**. Conversations using this model require a **position number** for access.

```
┌──────────┐          ┌──────────┐        ┌──────────┐      ┌──────────┐      ┌──────────┐
│ position │ ------   │   psn    │ -----  │  aptsl   │ ---- │   apt    │ ---- │   emp    │
│ select   │          │          │        │          │      │          │      │          │
└──────────┘          └──────────┘        └──────────┘      └──────────┘      └──────────┘
                           │
                           │
                 ----------  ┌──────────┐  ----  ┌────────────┐
                             │   asg    │        │  account   │
                             └──────────┘        └────────────┘
```
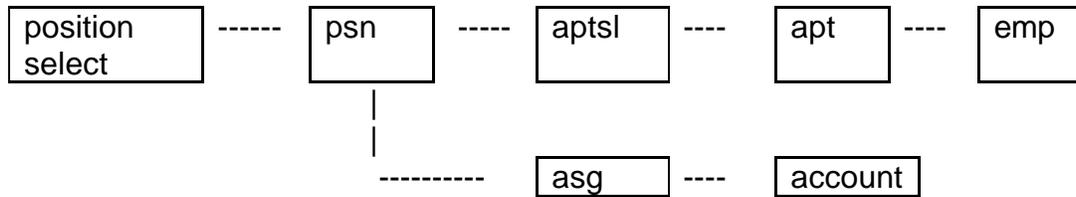
Figure 3 -- Model for Conversation Accessed by Position Number

Each conversation in the core *Inquiry System* uses one of the two basic conversation models.

Auxiliary conversations provide inquiry for job classification, name search, I-9 information and account information.

Quick access to an inquiry screen is provided by menu selection on the *HEPPS Inquiry Screen* or a simple command language.

EMPLOYEE

ONE EMPLOYEE : MANY POSITIONS

ONE POSITION : MANY EMPLOYEES

POSITION

ONE POSITION : MANY ACCOUNTS

ONE ACCOUNT : MANY POSITIONS

ACCOUNT
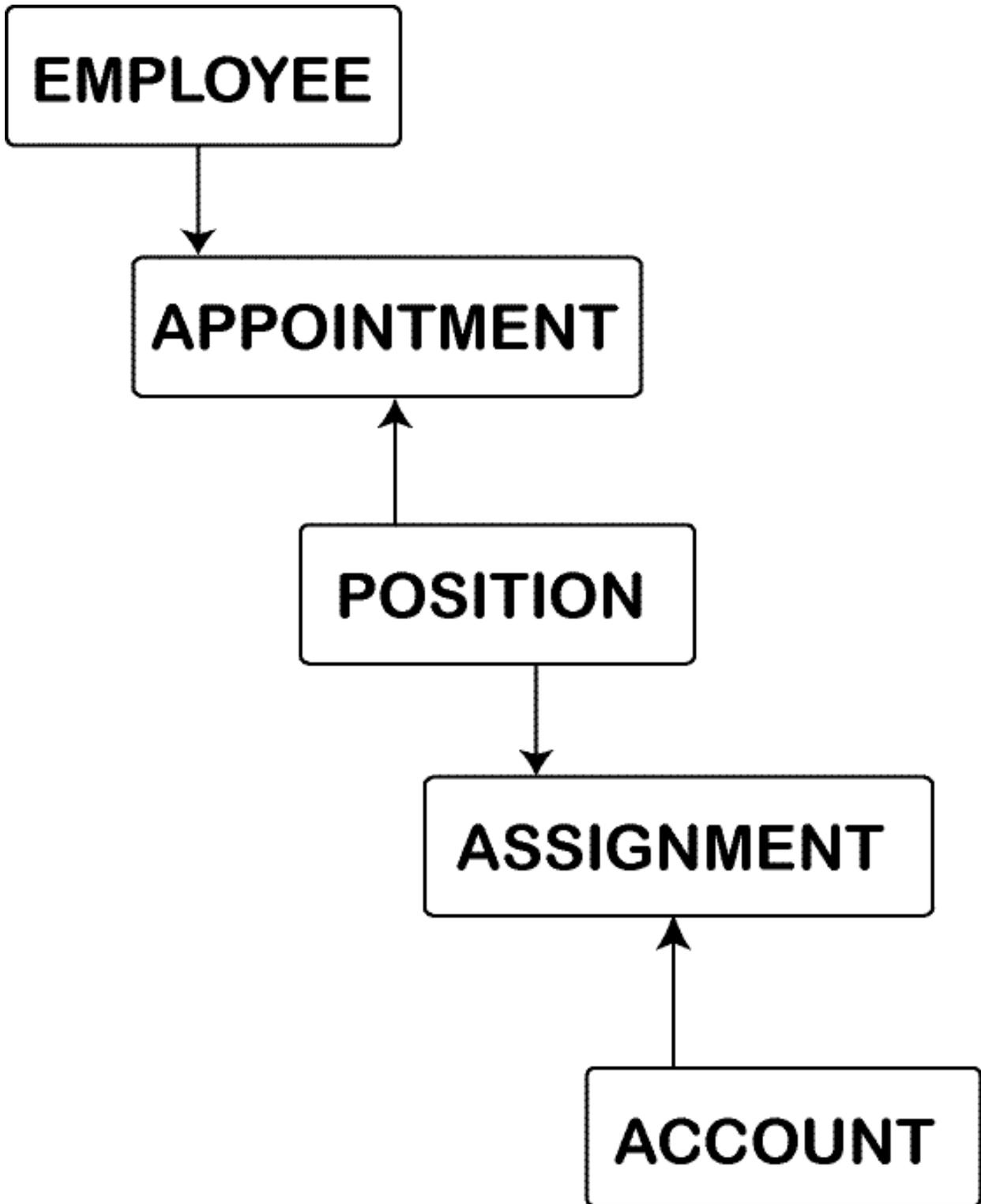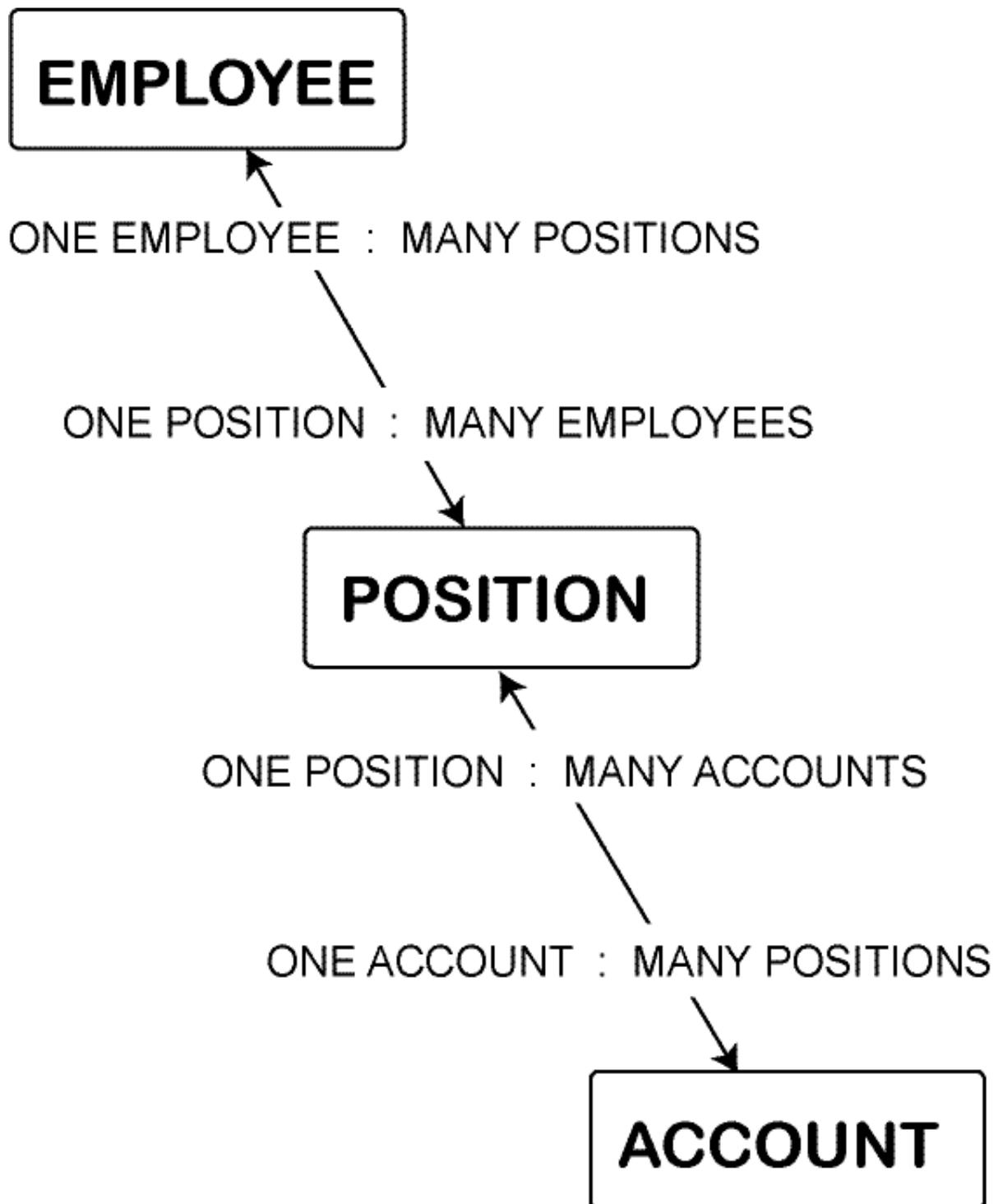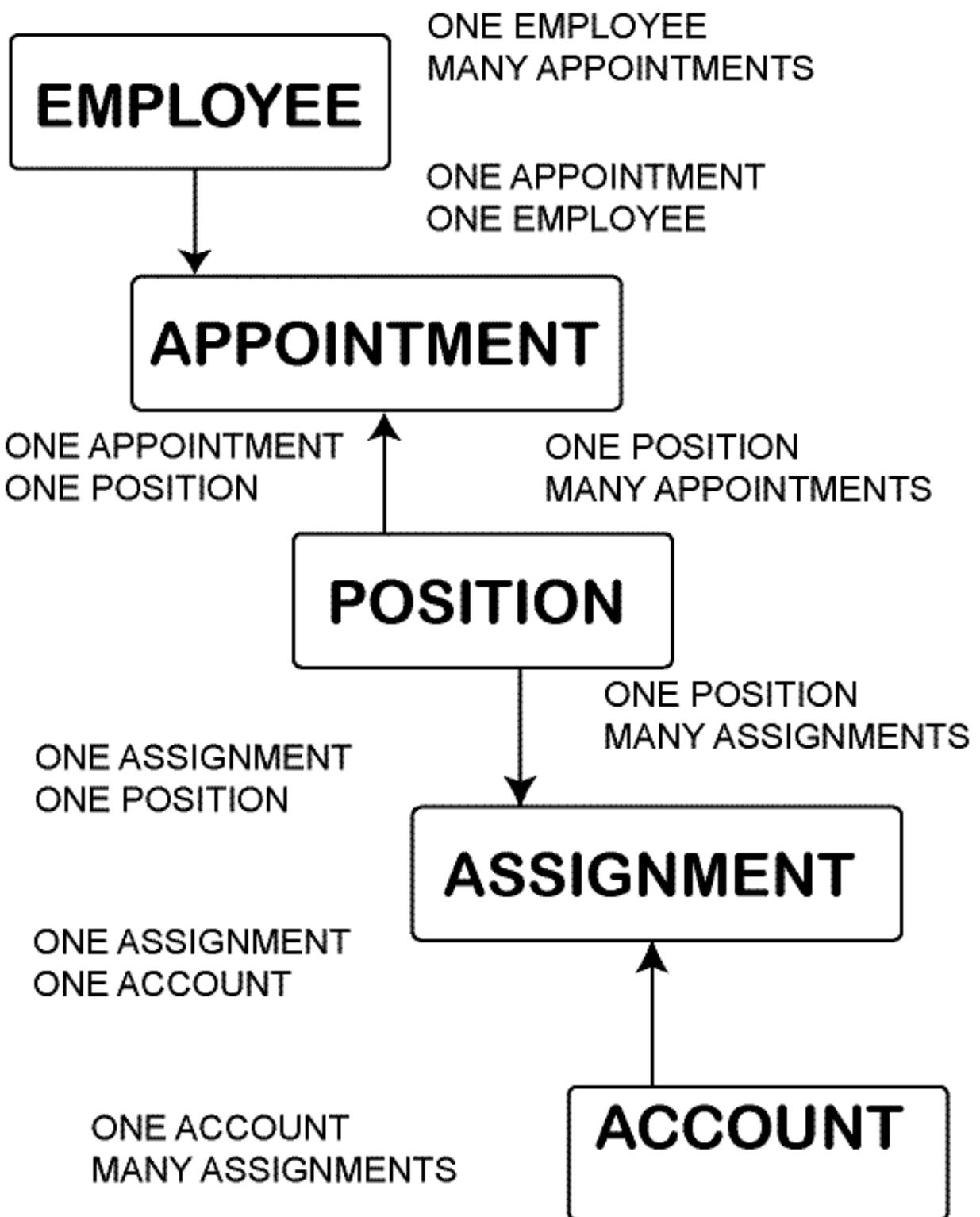
What Updates HEPPS?

Sources of Data	Position Control	HRS Records	CSHEO	Payroll
Personnel Action Form		I		A
Temporary Employment Action			A	A / I
Position Action	I			A
Expense Assignment Action	I			A
Expense Transfer				I / A
Cyclic Leave Letters	I	I		A
FMLA Application	I	I		A
Time Reports (LWOP)		I		A
Periodic Increment Date Letters			I	A
Probationary to Permanent Ltrs		I		A
Batch System		I		A
Salary Changes		I		A

Key: I = Input   A = Audited

Sources of data are input by the respective unit and copies are routed to other administrative offices for review and audit. HEPPS (for the most part) is a batch system. This means that input completed during the day is not updated (or applied to the *HEPPS System*) until that night. For example, changes input by HRS Records on Tuesday cannot be audited by Payroll until Wednesday.

The *HEPPS System* is updated each night until the pay cycle cut-off date is reached. This usually occurs three (3) working days before payroll is calculated. There is no HEPPS update on the night payroll is calculated. There will be an update the next night. So, generally speaking, there are no updates to *the HEPPS System* for four (4) working days around the time payroll is being calculated.

Using the HEPPS Inquiry System

HEPPS Inquiry -- Selecting a Conversation

Select a conversation by typing the letter identifier for the desired conversation on the Command Line ===> and press <ENTER> or key the conversation number on the Command Line ===> and press <ENTER>.

Getting Around in a Conversation

Once a conversation has been invoked, you may move to the next screen by pressing <ENTER>. You may move back to the previous screen by pressing the clear key.

You may return to *HEPPS Inquiry* from anywhere in a conversation by pressing <PF12>.

QP and **LP** conversations have a branch to select either ***appointment*** information or ***assignment*** information from the POSITION information screen.

♦ Type **ASG** and press <ENTER> to view assignment information OR
♦ Type **APT** and press <ENTER> to view appointment information

Display Screen Features

HEPPS Inquiry screens have features to provide information to aid in the use of the system.

The upper left corner of each screen has two information fields. The top field is the screen identifier. Directly below the screen identifier is a "where am I" indicator displaying the two-character conversation ID and the screen ID for the screen currently displayed.

Centered at the top of the screen is the screen title.

The upper right-hand corner has current date and time. This will serve as a time stamp for those using a screen print facility.

The bottom two lines of the screen display the PF Key definitions for the screen currently displayed.

PF Key Definition

Programmed Function (PF) keys have been defined to ease use of the *Inquiry System*. The following PF keys are standard throughout the *Inquiry System*.

PF2   Return to the SELECT screen for the current conversation

12

PF4   Display additional PF keys

PF6   Display the picklist variables

PF10 Scroll forward (only on screens with scrolling)

PF11 Scroll back (only on screens with scrolling)

PF12 Return to the Main Menu

The PF key definitions displayed on the bottom two lines of each screen identify the command to be executed or the screen to be displayed when the PF key is pressed.

Moving the Cursor

The cursor must occasionally be moved to the Command Line ===> or some other input field on a screen. The most effective means of moving the cursor is to use the **forward tab** (➔|) and **backward tab** (|←) keys. These keys move the cursor from one input field to the next.

"All" vs "Today"

These three display screens can be set to display "all" values or "today's" values:

POSITION / ASSIGNMENT

EMPLOYEE / APPOINTMENT SELECT

POSITION / APPOINTMENT SELECT

To display previous values for an individual, key the word "all" on the command line and press the Enter key. To restore the screen to the employee's current values, key "today" on the command line and press the Enter key.

Entering a Command

A command may be entered on the Command Line ===> of any screen. An invalid command or data key causes a message to be displayed. The command may be altered and re-entered.

If the position or employee selected for display has multiple appointments, an APPOINTMENT SELECT screen will be displayed. An appointment must be selected to allow display of a screen further into the conversation.

Commands on the HEPPS Inquiry Screen

◆ Conversation ID	The select screen for the conversation is displayed
◆ Conversation ID with data key	The first inquiry screen of the conversation is displayed
◆ Conversation ID with data key and screen ID	The selected inquiry screen of the conversation is displayed

Commands on Select Screens

◆ Conversation ID	The select screen of the new conversation is displayed
◆ Conversation ID with data key	The first inquiry screen in the new conversation is displayed
◆ Conversation ID with data key and screen ID	The selected inquiry screen of the new conversation displays the selected data
◆ Screen ID	The selected inquiry screen of the conversation is displayed

Commands on Inquiry Screens

◆ Conversation ID	Used for changing conversations (results will vary depending on data keys accessed in the current conversation
◆ Conversation ID with data key	The first inquiry screen of the new conversation is displayed
◆ Conversation ID with data key and screen ID	The selected inquiry screen of the new conversation displays the selected data
◆ Screen ID	The selected inquiry screen of the current conversation is displayed

HEPPS Inquiry Command Language

Introduction

Why a command language? The *HEPPS Inquiry System* is designed to be used by both novice and expert users. The novice or occasional user can successfully use the system with minimum instruction. The command language is a productivity enhancement feature, allowing expert users to select the desired information with a minimum of key strokes. All that is required is a basic understanding of the structure of each inquiry conversation and knowledge of the basic command.

Overview

The novice can make a selection from a menu and traverse an inquiry conversation using nothing more than the <ENTER> key to see the next screen or clear to see the previous screen. Certain Program Function (PF) keys are defined throughout the system:

> **PF2** Return to the "select screen" at the beginning of a conversation
>
> **PF6** Picklist
>
> **PF12** Return to the *HEPPS Inquiry Screen*

A person who uses the *Inquiry System* regularly will quickly learn which screens have which information within the inquiry conversations. The command language allows the expert user to identify a conversation, an employee or position, and a screen to display. The desired information is displayed immediately without display of intermediate screens. The user may then press <ENTER> to display the next screen. Another screen, employee or position may be defined on the Command Line ===> for display.

Command Format

All commands are based on a general format. A command has three parts:

> ♦ A 2 to 6 character conversation ID
> ♦ A data key (e.g., position number, SSN), and
> ♦ A screen ID

The command

> QP 123456 ASG

means "query position 123456 assignments". Assignment information for the position will be displayed if this is a valid position ID. A command may consist of one or more of the three parts.

Conversation ID's

Description	Requirements	Length	On Command Line Type:
Query Employee	Social Security Number	9	QE NNNNNNNNN *OR* QEMP NNNNNNNNN
Query Position	Position ID	5 - 6	QP NNNNN *OR* QPSN NNNNN *OR* QE NNNNNNNNN PSN *OR* QEMP NNNNNNNNN PSN
List Positions	User defines selection criteria		LP *OR* LPSN
Name Search	Name		NS *Last Name,First Name* (no spaces)
Query Job Class Table	Job Class ID	4	QJC NNNN
Query Account	Account Number	8	QACT NNNNNNNN *(the first 4 digits = Budget,* *the last 4 digits = Project)*
Query Appointment	Appointment ID Social Security Number	6 9	QAPT NNNNNN *OR* QE NNNNNNNNN APT *OR* QEMP NNNNNNNNN APT
Query Appointment Selection	Social Security Number	9	QE NNNNNNNNN APTSL *OR* QEMP NNNNNNNNN APTSL
Query Assignment	Social Security Number Position ID	9 5 - 6	ASG NNNNNNNNN *OR* QP NNNNN ASG
Query Appointments to Positions	Position ID	5 - 6	QP NNNNN APTSL
Query I-9 Information	Social Security Number	9	QE NNNNNNNNN I9
Accrual Information	Position ID	5 - 6	ACRL *OR* QACRL NNNNN *OR* QP NNNNN ACRL
Allocation Information	Position ID	5 - 6	ALCN *OR* QALCN NNNNN *OR* QP NNNNN ALCN
Base Information	Position ID	5 - 6	BASE *OR* QBASE NNNNN *OR* QP NNNNN BASE

Description	Requirements	Length	On Command Line Type:
Query SCAN Distribution Tables	User defines selection criteria		QRYSCAN
Query PEAR Distribution Tables	User defines selection criteria		QRYPEAR
Query Data Dictionary	User defines selection criteria		QDATA
Query Payroll Expense	Social Security Number	9	QPREXP NNNNNNNNN
Query Temporary Employment	Social Security Number WSU ID Number	9 9	QTEMP

SIGN-ON AND SIGN-OFF INSTRUCTIONS

To Sign-on

From the Administrative Information System Customer Identification Screen, key in your department's Procedure Number, User ID, Password and HEPPS for the Application ID. Press <ENTER>.

The HEPPS Information System Screen will be displayed. Press <ENTER> to continue to the HEPPS Main Menu Screen.

Key the conversation number or conversation ID "INQUIRY" on the Command Line ===> and press <ENTER>.

The HEPPS Inquiry Screen will be displayed. Key the conversation number or conversation ID on the Command Line ===> and press <ENTER> to view a specific conversation.

To Sign-off

Press PF12 (one or more times) from almost any screen to return to the Customer Identification Screen.

Hints

From the Customer Identification Screen, press PF4 to set the default procedure number and default application ID (such as HEPPS) and press PF12.   This eliminates keying the procedure number and application ID anytime you log on.

PF1 displays all AIS applications you have access to such as: OARS, HEPPS, PAPR, WSUORG, SCBAIMS.

PF5 to change your password for all AIS applications.

System Components

The basic components of the *HEPPS Inquiry System* are:

Components	Action
HEPPS Inquiry Select Screen	Lists the available conversations. A conversation is selected by typing the 2 to 6 letter identifier on the Command Line ===> or by keying the conversation ID.
QE - Query Employee	The Query Employee conversation provides information about a specific employee and related appointments, positions and assignments.
QP - Query Position	The Query Position conversation provides information about a specific position and related assignments, appointments and employees.
LP - List Positions	The List Positions conversation provides a list of positions based on selection criteria provided by the user. The user may then select a position and have access to the same information as provided by the QP conversation.
NS - Name Search (UNAF)	The Name Search conversation provides information using a name or Social Security Number as a key. An entry may be selected for detailed display if the person selected is an employee.
QAC - Query Account (FACTS) *(Financial Accounting System)*	The Account conversation provides information about the selected account.
QJC - Query Job Class	The Job Class conversation provides information about the selected job class. Access to the job class conversation is from the Command Line ===> of any display screen.

HEPPS INQUIRY TUTORIAL BY CONVERSATION

Using HEPPS Inquiry Conversation Tutorial

The following sections are intended as a tutorial to introduce the user to the HEPPS Inquiry conversations. These exercises will introduce you to many of the features of the system, including the command language. Use your own social security number and position number for familiarization with the system.

NOTE: When no input is required on a screen, pressing the <ENTER> key (with no input on the Command Line ===>) causes the next screen in a conversation to be displayed. If you are at the last screen of a conversation, pressing <ENTER> (with no input on the Command Line ===>) will cause no change. Pressing the clear key causes the previous screen to be displayed.

Tutorial for the QUERY EMPLOYEE Conversation

Employee Select	-----	emp	-----	aptsl	----	apt	----	psn	----	asg	----	account

The QUERY EMPLOYEE Conversation -- QE or QEMP

1 **Start Conversation and Identify Employee for Inquiry**

♦ From the *HEPPS INQUIRY*, key the conversation number or key **QE** or **QEMP** on the Command Line ===> and press <ENTER>.

♦ When the *EMPLOYEE SELECT* screen is displayed, key in a social security number and press <ENTER>.

♦ Employee information will be displayed on the *EMPLOYEE* screen.

2 **Display the Next Screen**

♦ To display the next screen, press <ENTER>.

♦ The *EMPLOYEE/APPOINTMENT SELECT* screen will be displayed, listing current appointments.

3 **Select Appointment**

♦ Type the number from the 'Sel Num' column on the Command Line ===> for the appointment you want to view and press <ENTER>.

4 **Display *APPOINTMENT* Screen**

♦ The appointment information will be displayed on the *APPOINTMENT* screen.

5 **Display *POSITION* Screen**

♦ To display the next screen, press <ENTER>.

♦ The *POSITION* screen will display the position information.

6 **Display *ASSIGNMENT* Screen**

♦ To display the next screen, press <ENTER>.

♦ Assignment information will be displayed on the *POSITION/ASSIGNMENT* screen.

7 **Display *ACCOUNT* Screen**

♦ Type the number from the 'SEL Num' column on the Command Line ===> and press <ENTER>.

♦ The account information for that budget/project will be displayed.

8 **Return to the *EMPLOYEE SELECT* Screen**

♦ Press PF12

♦ Press PF2

♦ The *EMPLOYEE SELECT* screen will be displayed.

9 **Return to *HEPPS INQUIRY* Screen**

♦ Press PF12 (or move the cursor to the Command Line ===>, type END and press <ENTER>.)

♦ The *HEPPS INQUIRY* screen will be displayed.

10 **Direct Screen Access Using Command**

♦ Type QE NNN NN NNNN PSN ("NNN NN NNNN" represents a 9-digit social security number) on the Command Line ===> and press <ENTER>.

♦ The *POSITION* screen will be displayed. However, if the employee selected has multiple appointments, the *EMPLOYEE/APPOINTMENT SELECT* screen may appear for you to identify the appointment/position information to be displayed. If there are more than seven appointments, scroll forward (PF10) to see more appointment information. To scroll backward, press PF11. Type the number from the 'Sel Num' column on the Command Line ===> for the appointment you want to view and press <ENTER>. The *APPOINTMENT* screen will appear.

♦ Find a position number on the screen. Write it down for use in the *QUERY POSITION* tutorial.

11 **Return to *HEPPS INQUIRY* Screen**

♦ Press PF12

12 **To Exit**

♦ Press PF12 twice.

Tutorial for the QUERY POSITION Conversation

```
+----------+       +------+       +-------+       +-----+
| position |------ | psn  | ----- | aptsl | ----  | apt |
| select   |       +------+       +-------+       +-----+
+----------+          |
                      |
        ----------  +------+  ----  +---------+
                    | asg  |        | account |
                    +------+        +---------+
```
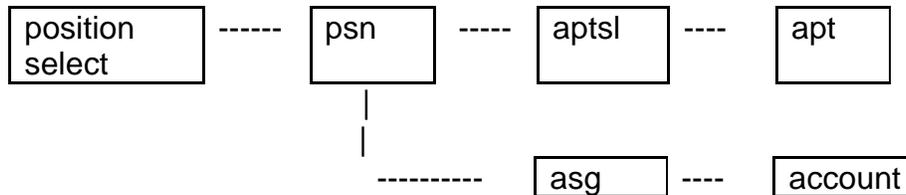
The QUERY POSITION Conversation -- QP or QPSN

1 **Start Conversation and Identify Position for Inquiry**

   ♦ From the *HEPPS INQUIRY*, key the conversation number or key **QP** or **QPSN** on the Command Line ===> and press <ENTER>.

   ♦ When the *POSITION SELECT* screen is displayed, key in a position number and press <ENTER>.

   ♦ Position information will be displayed on the *POSITION* screen.

2 **Select APPOINTMENT INFORMATION Option**

   ♦ You must select either *APPOINTMENT* (APT) or *ASSIGNMENT* (ASG) information to see the next screen from the *POSITION* screen in the *QUERY POSITION* conversation.   Type **APT** on the Command Line ===> and press <ENTER>.

   ♦ The *POSITION/APPOINTMENT SELECT* screen will be displayed, listing current appointments if multiple appointments exist. Type the number from the 'Sel Num' column on the Command Line ===> and press <ENTER>.

   ♦ The appointment information will be displayed on the *APPOINTMENT* screen.

3 **Display *POSITION* Screen**

   ♦ To display the next screen, press <ENTER>.

   ♦ The *POSITION* screen will display the position information.

4 **Return to *POSITION SELECT* Screen**

   ♦ Press PF2

   ♦ The *POSITION SELECT* screen will appear. Key in a position number and press <ENTER>.

5 **Display *POSITION* Screen**

    ♦ Press <ENTER>.

    ♦ The *POSITION* screen will be displayed.

6 **Select the ASSIGNMENT INFORMATION Option**

    ♦ Type **ASG** on the Command Line ===> and press <ENTER>

    ♦ Assignment information will be displayed on the *POSITION/ASSIGNMENT* screen.

7 **Display *ACCOUNT* Screen**

    ♦ Type a number from the 'SEL Num' column on the Command Line ===> and press <ENTER>.

    ♦ The account information for that budget/project will be displayed.

8 **Return to the *POSITION SELECT* Screen**

    ♦ Press PF12

    ♦ The *POSITION SELECT* screen will appear.

9 **Return to *HEPPS INQUIRY* Screen**

    ♦ Press PF12 (or move the cursor to the Command Line ===>, type END and press <ENTER>).

    ♦ The *HEPPS INQUIRY* screen will be displayed.

10 **Direct Screen Access Using Command**

    ♦ Type QP NNNNNN ASG (where "NNNNNN" is a position number) on the Command Line ===> and press <ENTER>.

    The *POSITION/ASSIGNMENT* screen will be displayed.

11   **Return to *HEPPS INQUIRY* Screen**

   ♦   Press PF12

12   **To Exit**

   ♦   Press PF12 twice.

Tutorial for the LIST POSITIONS Conversation

```
┌──────────┐         ┌──────┐         ┌───────┐         ┌─────┐
│ position │ ------- │ psn  │ ------- │ aptsl │ ------- │ apt │
│ list     │         │      │         │       │         │     │
└──────────┘         └──────┘         └───────┘         └─────┘
                        │
                        │
                   ----------    ┌─────────┐
                                 │  asg    │
                                 └─────────┘
```

The LIST POSITIONS Conversation -- LP or LPSN

1 **Start Conversation and Identify Position for Inquiry**

♦ From the *HEPPS INQUIRY*, key the conversation number or key **LP** or **LPSN** on the
   Command Line ===> and press <ENTER>.

♦ When the *LIST POSITIONS* screen is displayed, key selection criteria in one or
   more of the fields and press <ENTER>.

♦ A list of positions meeting the selection criteria will be displayed. If no positions are
   displayed, change the selection criteria.

2 **Select a position for Inquiry**

♦ Using the **forward tab** (➔|) key, move the cursor to one of the lines in the position
   list.

♦ Type an *X* and press <ENTER> to view the *POSITION* screen

3 **Select APPOINTMENT INFORMATION Option**

♦ You must select either *APPOINTMENT* (APT) or *ASSIGNMENT* (ASG) information
   to see the next screen from the *POSITION* screen in the *QUERY POSITION*
   conversation.   Type **APT** on the Command Line ===> and press <ENTER>.

♦ If the position has multiple appointments, the *POSITION/APPOINTMENT SELECT*
   screen will be displayed, listing current appointments. Type the number from the
   'Sel Num' column on the Command Line ===> for the appointment you want to view
   and press <ENTER>.

♦ The appointment information will be displayed on the *APPOINTMENT* screen.

4 **Return to *LIST POSITIONS* Screen**

   ♦ Press PF2

   ♦ The *LIST POSITIONS* screen will appear with selection criteria and the list of positions.

5 **Return to *HEPPS INQUIRY* Screen**

   ♦ Press PF12

6 **To Exit**

   ♦ Press PF12 twice.

Tutorial for the NAME SEARCH Conversation

| name list | ----- | emp | ----- | aptsl | ---- | apt | ---- | psn | ---- | asg |

The NAME SEARCH Conversation -- NS

1 **Start Conversation and Identify Employee for Inquiry**

♦ From the *HEPPS INQUIRY*, key **NS** on the Command Line ===> and press <ENTER>.

♦ When the *NAME SEARCH* screen is displayed, key in a name or partial name and press <ENTER>. **MATCHING** is the default search option. A search type option is not required if you want matching.

♦ The *NAME SEARCH - MATCHING* screen with the list of selected names will be displayed.

♦ Press PF4 for additional help.

♦ Press PF8 to display *DEMOGRAPHIC, RECORD TYPE* or *ADDRESS* information.

2 **Select an Employee for Inquiry**

♦ Scroll forward (PF10) or backward (PF11) through the list of names.

♦ Press PF8 to display *RECORD TYPE, DEMOGRAPIC* or *ADDRESS* information.

♦ When you find an entry with a record type of EMPLY, move the cursor next to the entry, type an **X** and press <ENTER>.

♦ If the person is a current employee, the *EMPLOYEE* screen will be displayed. If a "NO EMPLOYEE FOUND..." message is displayed, try another entry.

3 **Display the Next Screen**

♦ To display the next screen, press <ENTER>.

♦ The *EMPLOYEE/APPOINTMENT SELECT* screen will be displayed, listing current appointments.

4 **Select Appointment**

♦ Type the number from the 'Sel Num' column on the Command Line ===> for the appointment you want to view and press <ENTER>.

5 **Display *APPOINTMENT* Screen**

♦ The appointment information will be displayed on the *APPOINTMENT* screen.

6 **Display *POSITION* Screen**

♦ To display the next screen, press <ENTER>.

♦ The *POSITION* screen will display the position information.

7 **Return to the *SELECT* Screen**

♦ Press PF2

♦ The *NAME SEARCH - MATCHING* screen will be displayed.

♦ You may select another entry for inquiry. Move the cursor to one of the selection fields (use the **forward tab** (➔|) key).

♦ Type an *X* and press <ENTER>.

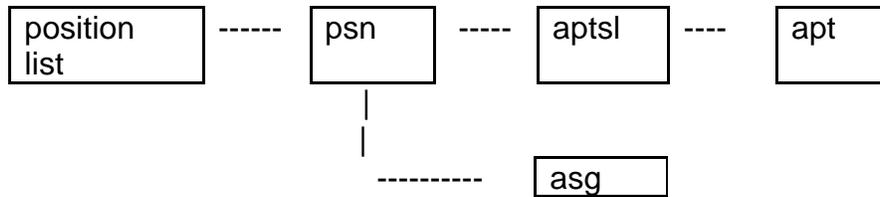♦ The *EMPLOYEE* information for the person you selected will be displayed.

8 **Return to *HEPPS INQUIRY* Screen**

♦ Press PF12

9 **To Exit**

♦ Press PF12 twice.

Tutorial for the JOB CLASSIFICATION Conversation

The *JOB CLASSIFICATION* Conversation provides information describing the designated job classification.

1. From the *HEPPS INQUIRY* screen, key the conversation number or **QJC** NNNN (where "NNNN", is the job class ID) on the Command Line ===> and press <ENTER>.

2. The *JOB CLASSIFICATION* display screen will be displayed.

3. The *JOB CLASSIFICATION* Conversation may also be accessed from within another conversation.

4. If position information is currently being displayed, type **QJC** on the Command Line ===> and press <ENTER>.

5. Otherwise, type **QJC** NNNN (where "NNNN" is the job class ID) on the Command Line ====> and press <ENTER>. Note PF5 for details.

6. To exit, press PF12 three times.

Tutorial for the QUERY ACCOUNT Conversation

The *QUERY ACCOUNT* Conversation provides information describing the designated account.

1. From the *HEPPS INQUIRY*, key the conversation number or **QACT** NNNN NNNN (where "NNNN NNNN", is the budget / project) on the Command Line ===> and press <ENTER>. Currently, budget/project is the account ID.

2. The *ACCOUNT* screen will be displayed.

3. The *ACCOUNT* Conversation may also be accessed from within another conversation.

4. If *POSITION/ASSIGNMENT* information is currently being displayed, type the number from the 'Sel Num' column on the Command Line ===> for the assignment account detail you want to view and press <ENTER>.

5. Otherwise, type **QACT** NNNN NNNN (where "NNNN NNNN" is the budget / project) on the Command Line ====> and press <ENTER>.

6. To exit, press PF12 three times.

Tutorial for the QUERY PAYROLL EXPENSE Conversation

Start Conversation and Identify the Employee for Inquiry

- From the *HEPPS INQUIRY*, key the conversation number or key **QPREXP** on the Command Line ===> and press <ENTER>.

- Complete the selection criteria as appropriate, then press <ENTER>.

- Press PF1 or press <ENTER> to display the payroll expenses for the period requested in the criteria.

- Key the selection number on the Command Line ===> to view the contribution details for the specific payroll expense.

- HINT: See PF4 for additional function keys.

- Press PF12 three times to exit HEPPS.

Tutorial for the QUERY I-9 INFORMATION Conversation

Start Conversation and Identify the Employee for Inquiry

- From the *HEPPS INQUIRY*, key the conversation number or key **QE** or **QEMP** on the Command Line ===> and press <ENTER>.

- When the *EMPLOYEE SELECT* screen is displayed, key in a social security number and press <ENTER>.

- Employee information will be displayed on the *EMPLOYEE* screen.

- Key **I9** on the Command Line ===> and press <ENTER> to view the I-9 Data.

- Press PF12 three times to exit HEPPS.

Tutorial for the QUERY APPOINTMENT Conversation

Start Conversation and Identify the Appointment(s) for Inquiry

♦ From the *HEPPS INQUIRY*, key the conversation number or key **QAPT** on the Command Line ===> and press <ENTER>.

♦ When the *APPOINTMENT SELECT* screen is displayed, key in the appointment number and press <ENTER>.

♦ Appointment details for this appointment will be displayed.

♦ Press PF4 for additional functions within this conversation.

♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY ALLOCATION ADJUSTMENT DETAIL Conversation

Start Conversation and Identify the Position Allocation Adjustment Detail

♦ From the *HEPPS INQUIRY*, key the conversation number or key **QALCN** on the Command Line ===> and press <ENTER>.

♦ When the *POSITION SELECT* screen is displayed, key in a position number and press <ENTER>.

♦ Allocation adjustment details for this position will be displayed.

♦ Press PF4 for additional functions within this conversation.

♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY BASE ADJUSTMENT DETAIL Conversation

Start Conversation and Identify the Position Base Adjustment Detail

- ♦ From the *HEPPS INQUIRY*, key the conversation number or key **QBASE** on the Command Line ===> and press <ENTER>.

- ♦ When the *POSITION SELECT* screen is displayed, key in a position number and press <ENTER>.

- ♦ Base adjustment details for this position will be displayed.

- ♦ Press PF4 for additional functions within this conversation.

- ♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY ACCRUAL Conversation

Start Conversation and Identify the Position Accrual Detail

- ♦ From the *HEPPS INQUIRY*, key the conversation number or key **QACRL** on the Command Line ===> and press <ENTER>.

- ♦ When the *POSITION SELECT* screen is displayed, key in a position number and press <ENTER>.

- ♦ Accrual details for this position will be displayed.

- ♦ Press PF4 for additional functions within this conversation.

- ♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY DATA DICTIONARY DETAIL Conversation

Start Conversation and Identify the Data Entity for the Inquiry

- ♦ From the *HEPPS INQUIRY*, key the conversation number or key **QDATA** on the Command Line ===> and press <ENTER>.

- ♦ From the *SELECT DATA ENTITY* screen, key an X on the selection line to the left of the entity name and press <ENTER>.

- ♦ Key an X on the line to the left of the data attribute(s) you wish to review and press <ENTER>.

- ♦ PF keys will be displayed to show additional functions. Try PF6 'Picklist' to see the valid values for this attribute or try PF7 'Text' to view the description about the attributes.

- ♦ Press PF12 three times to exit HEPPS.

Tutorial for the QUERY SCAN DISTRIBUTION TABLE Conversation

To start this Conversation:

1   From the *HEPPS INQUIRY*, key the conversation number or key **QRYSCAN** on the Command Line ===> and press <ENTER>.

2   There are three (3) ways to view account information in the SCAN file:

♦   To view the entire file, press PF1.

♦   To view accounts by department zip code, press PF3, key in zip code and press <ENTER>.

♦   To view specific account details, key in account (budget and project) and press <ENTER>.

3   Off-campus units have unique zip codes assigned by Payroll Services and the zip code in the SCAN file may be different in the PEAR file. Press PF1 to view the entire file to determine the zip code assigned by Payroll.

If the account number is not found in the file, the message 'Record Was Not Found 2' will appear in the top left-hand corner of the screen. All new account numbers must be found in BALANCES and must be active.

4   The SCAN attributes are:

Attribute	Column		Length Rules
Budget	1-4	N4	See Below
Project	6-9	N4	See Below
Dept Zip	12-15	A4	NNNN
Dept Name	17-31	A15	
AIS User ID Primary	32-38	A8	
AIS User ID Secondary 1	39-46	A8	
AIS User ID Secondary 2	47-54	A8	
AIS User ID Secondary 3	55-62	A8	
AIS User ID Secondary 4	63-70	A8	

5   Budget / Project Acceptable Values

B = Budget   P = Project   X = Wildcard

Values Example:

BBBBPPPP	One Account
BBBBPPPX	One Budget, as many as 10 Projects
BBBBPPXX	One Budget, as many as 100 Projects
BBBBPXXX	One Budget, as many as 1,000 Projects
BBBBXXXX	One Budget, All Projects
BBBXXXXX	As many as 10 Budgets and All Projects
BBXXXXXX	As many as 100 Budgets and All Projects

Example:

BBBBPPPP	HEPPS User ID's
1234XXXX	SMITH, JONES
12340010	MILLER, ANDERSON

Smith and Jones will have access to ALL accounts for budget 1234 EXCEPT 1234-0010, which ONLY MILLER and ANDERSON will have access to. Generally speaking, access at any level in the wildcard hierarchy is across the board, except that any access specified at lower levels in the same hierarchy structure is excluded. Department personnel may revise their account configurations to eliminate redundant table entries.

6   Changes in the SCAN Distribution File may be made for various reasons, such as:

♦   Department name change

♦   Department zip code change

♦   Primary/Secondary AIS User ID changes

♦   To consolidate account entries

♦   To establish table entries for new account(s)

7   Notify Payroll Services via e-mail to alice@wsu.edu (or a memorandum addressed to the Payroll Officer) and include the following data:

♦   Name and phone number of department contact person.

♦   Department zip code

♦   Which file to update -- SCAN, PEAR or both

♦   Account(s) to be updated

♦   Description of requested change

8   Change requests affecting SCANS should be received in Payroll Services two (2) days before SCANS are scheduled to be distributed.

9   Press PF12 twice to exit HEPPS.

Tutorial for the QUERY PEAR BUDGET/ZIP TABLE Conversation

To start this Conversation:

1   From the *HEPPS INQUIRY*, key the conversation number or key **QRYPEAR** on the Command Line ===> and press <ENTER>.

2   There are three (3) ways to view account information in the PEAR file:

   ♦ To view the entire file, press PF1.

   ♦ To view accounts by department zip code, press PF3, key in zip code and press <ENTER>.

   ♦ To view specific account details, key in account (budget and project) and press <ENTER>.

3   Off-campus units have unique zip codes assigned by Payroll Services and the zip code in the PEAR file may be different in the SCAN file. Press PF1 to view the entire file to determine the zip code assigned by Payroll.

   If the account number is not found in the file, the message 'Record Was Not Found 2' will appear in the top left-hand corner of the screen. All new account numbers must be found in BALANCES and must be active.

4   The PEAR attributes are:

Attribute	Column		Length Rules
Budget	1-4	N4	See Below
Project	6-9	N4	See Below
Dept Zip	12-15	A5	NNNN or NNNNA
Dept Name	19-43	A25	
Dept Contact Phone	51-58	A8	
Work County Code	68-69	N2	
Print 3rd Copy	80	A1	
AIS User ID Primary User	81-88	A8	
AIS User ID Secondary 1	89-96	A8	
AIS User ID Secondary 2	97-104	A8	
AIS User ID Secondary 3	105-112	A8	
AIS User ID Secondary 4	113-120	A8	

5   Budget / Project Acceptable Values

   B = Budget   P = Project   X = Wildcard

         <u>Values Example</u>:

         BBBBPPPP   One Account
         BBBBPPPX   One Budget, as many as 10 Projects
         BBBBPPXX   One Budget, as many as 100 Projects
         BBBBPXXX   One Budget, as many as 1,000 Projects
         BBBBXXXX   One Budget, All Projects
         BBBXXXXX   As many as 10 Budgets and All Projects
         BBXXXXXX   As many as 100 Budgets and All Projects

         Example:

         BBBBPPPP   HEPPS User ID's

         1234XXXX   SMITH, JONES
         12340010   MILLER, ANDERSON

   Smith and Jones will have access to ALL accounts for budget 1234 EXCEPT 1234-0010, which ONLY MILLER and ANDERSON will have access to.   Generally speaking, access at any level in the wildcard hierarchy is across the board, except that any access specified at lower levels in the same hierarchy structure is excluded. Department personnel may revise their account configurations to eliminate redundant table entries.

6   Changes in the PEAR Distribution Files may be made for various reasons, such as:

   ♦ Department name change

   ♦ Department zip code change

   ♦ Primary/Secondary AIS User ID changes

   ♦ To consolidate account entries

   ♦ To establish table entries for new account(s)

7   Notify Payroll Services via e-mail to alice@wsu.edu (or a memorandum addressed to the Payroll Officer) and include the following data:

   ♦ Name and phone number of department contact person.

   ♦ Department zip code

   ♦ Which file to update -- SCAN, PEAR or both

   ♦ Account(s) to be updated

   ♦ Description of requested change

8   Change requests affecting SCANS should be received in Payroll Services two (2) days before PEARS are scheduled to be distributed.

9   Press PF12 twice to exit HEPPS.

Tutorial for the QUERY TEMPORARY EMPLOYMENT Conversation

♦ From the *HEPPS INQUIRY*, key the conversation number or key **QTEMP** on the Command Line ===> and press <ENTER>.

♦ Key the Temporary Job ID from the Appointment screen and press <ENTER>. Contact CSHEO with any questions about this data.

♦ Key the department number instead of the Temporary Job ID and press <ENTER>. The active Temporary Job ID's will be displayed.

♦ Press PF3 to go to the Financial Aid System to view work study limits.

♦ Key in the student's ID number and session, then press <ENTER> to view work study awards. Press PF5 to decode data.

Basic HEPPS Conversations

QE or QEMP: Query Employee Conversation

HEPPS
Inquiry
|
|
|
|
|
|
|
	Type **QE** or **QEMP** on the Command Line ===> and press <ENTER>.
	A command in one of the following forms may be used:
	    QE or **QEMP** NNN NN NNNN XXX
	    QE or **QEMP** NNNNNNNNN XXX
	    QE or **QEMP** NNN NN NNNN
	    QE or **QEMP** NNNNNNNNN
	Where 'NNN NNN NNN' is a SSN.
	Where 'XXX' is a screen identifier (up to eight characters).

Employee Select	Key in the SSN of the employee you are interested in and press <ENTER>. (This screen is bypassed if a SSN is provided in a command.)
Employee Display	Display of employee information.
Appointment Select	List of appointments for the selected employee. (May be bypassed if only one appointment to the position.)
Appointment Display	Display of the selected appointment information.
Position Display	Display of the position for the appointment.
Assignment Display	Display of Assignments for the position.
Account Display	Display of Account data from FACTS.

QP or QPSN: Query Position Conversation

```
┌─────────────┐          Type QP or QPSN on the Command Line ===> and press <ENTER>.
│ HEPPS       │          A command in one of the following forms may be used:
│ Inquiry     │                  QP or QPSN NNNNNN XXX
└─────────────┘                  QP or QPSN NNNNNN
       │                  Where 'NNN NNN NNN' is a position number.
       │                  Where 'XXX' is a screen identifier (up to eight characters).
       │
┌─────────────┐          Key in the POSITION ID of the position you are interested in and press
│ Position    │          <ENTER>.
│ Select      │
└─────────────┘
       │
┌─────────────┐
│ Position    │   ──     Display of position information.
│ Display     │    │
└─────────────┘    │
       │           │
┌─────────────┐    │      List of appointments for the selected position.
│ Appointment │    │      (Type APT and press <ENTER> to see this display.)
│ Select      │   ──     May be bypassed if only one appointment to the position.
└─────────────┘
       │
┌─────────────┐
│ Appointment │          Display of the selected appointment information.
│ Display     │
└─────────────┘
       │
┌─────────────┐
│ Assignment  │          Display of Assignments for the position.
│ Display     │          (Type ASG and press <ENTER> to see this display.)
└─────────────┘
       │
┌─────────────┐
│ Account     │          Display of Account information from FACTS.
│ Display     │
└─────────────┘
```

LP or LPSN: List Positions Conversation

HEPPS Inquiry	Type **LP** or **LPSN** on the Command Line ===> and press <ENTER>.
Selection Criteria	Key in the criteria you are interested in and press <ENTER>.
Position Select	Select the POSITION you are interested in and press <ENTER>.
Position Display	Display of position information.
Appointment Select	List of appointments for the selected position. (Type APT and press <ENTER> to see this display.) May be bypassed if only one appointment to the position.
Appointment Display	Display of the selected appointment information.
Assignment Display	Display of Assignments for the position. (Type ASG and press <ENTER> to see this display.)

NS: **Name Search Conversation**

HEPPS Inquiry	Type **NS** on the Command Line ===> and press <ENTER>.
Name Search Criteria	Key in the name in *Last Name, First Name* format without spaces and search type. Press <ENTER>.
Name List	Display of name, address, SSN, WSU number. Select one for detailed display if desired and press <ENTER>.
Employee Display	Display of employee information.
Appointment Select	List of appointments for the selected employee.
Appointment Display	Display of the selected appointment information.
Position Display	Display of the position for the appointment.
Assignment Display	Display of assignments for the position.

QACT: Query Account Conversation

```
┌─────────────────┐
│ HEPPS           │
│ Inquiry         │
│                 │
└─────────────────┘
        │
        │
        │
        │
        │
┌─────────────────┐
│ Account         │
│ Display         │
└─────────────────┘
```

Type **QACT** on the Command Line ===> and press <ENTER>.
The **QACT** Conversation may be accessed from any display screen in the *Inquiry System* using the following command:

      QACT NNNNMMMM

Where 'NNNN' is the budget.
Where 'MMMM' is the project.

Display of account information for the selected account.

QJC: Query Job Class Conversation

```
┌─────────────────┐
│ HEPPS           │
│ Inquiry         │
│                 │
└─────────────────┘
        │
        │
        │
        │
        │
┌─────────────────┐
│ Job Class       │
│ Display         │
└─────────────────┘
```

Type **QJC** on the Command Line ===> and press <ENTER>.
The **QJC** Conversation may be accessed from any display screen in the *Inquiry System* using the following command:

      QJC NNNN

Where 'NNNN' is the Job Classification ID

Display of Job Class information for the selected Job Classification ID.

To log into the HEPPS System:

```
GNTP0200            Administrative Information System       08:30:30  08/27/97
GNSG0200               Customer Identification Screen        Term. ID X2C2
 ------------------------------------------------------------------------------

  To Logon, Please enter the following information

                Procedure Number         (            )    REQUIRED

                User ID                   (            )    REQUIRED

                Password                  (            )    REQUIRED

                Application ID            (            )    REQUIRED



        For assistance please press PF9 or call:    (509) 335-0522


                                                       PF Key (     )
 ------------------------------------------------------------------------------
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      APPL  NEWS  QUIT  OPTNS NEWPW                   HELP              QUIT
```

Key in the following and press <ENTER>:

        Procedure Number
        User ID
        Password
        Application ID: *HEPPS*

HEPPS Logo:

```
 PPHP5010  NAT-2                                        20:10:35  08/28/97
                         ---------------------------
                         WASHINGTON STATE UNIVERSITY
                         ---------------------------

     HHHHH   HHHHH  EEEEEEEEE  PPPPPPPPP    PPPPPPPPP    SSSSSSS
      HHHHH   HHHHH  EEEEEEEEE  PPPPPPPPPP  PPPPPPPPPP   SSSSSSSSSS
      HHHHH   HHHHH  EEEE        PPPP  PPP PPPP  PPPP  SSSSS   SSSS
     HHHHHHHHHHHHHH  EEEEEEEEE   PPPP PPPP PPPP  PPPP   SSSSS
      HHHHHHHHHHHHHH  EEEEEEEEE  PPPPPPPPPP  PPPPPPPPPP    SSSSS
     HHHHH   HHHHH  EEEE        PPPP         PPPP     SSSS   SSSSS
      HHHHH   HHHHH  EEEEEEEEE  PPPP         PPPP    SSSSSSSSSSSSS
     HHHHH   HHHHH  EEEEEEEEE  PPPP         PPPP     SSSSSSSSSS


                       -------------------------------
                          INFORMATION SYSTEM
                       -------------------------------

                       Press <ENTER> for Command Menu

 COMMAND ==>
                                                         PF12 = EXIT
```

This is the HEPPS Logo Screen. Press <ENTER> to continue.

A command may be entered on the Command Line.

Press PF12 to exit

HEPPS Main Menu:

 Please select one of the following commands:

 1 INQUIRY Hepps Inquiry
 2 WRKPLACE Employee Workplace
 3 MAILSTOP WSU Mail Stops


```
                                                          Page 1 of 1

Command ==>                              PF9  = Help PF12 = Exit
```

This is the HEPPS Main Menu Screen.

To select HEPPS Inquiry, key the conversation number or conversation ID (*INQUIRY*) on the Command Line and press <ENTER>.

To exit, press PF12 twice.

HEPPS Inquiry:

```
INQUIRY    HEPPS INQUIRY                            08:58:03  08/27/97

Please select one of the following commands:

1  NS       Name Search                  16 QRYSCAN  Qry Scan Distribution Tbl
2  QACRL    Query Accrual
3  QACT     Query Account
4  QALCN    Alcn Adjustment Detail
5  QAPT     Query Appointment
6  QBASE    Base Adjustment Detail
7  QEMP     Query Employee
8  QJC      Query Job Class
9  QPREXP   Query Payroll Expense
10 QPSN     Query Position
11 QTNR     Query Tenure
12 QTEMP    Query Temp Employment
13 QDATA    Query Data Dictionary
14 LPSN     List Position
15 QRYPEAR  Qry PEAR Budget/Zip Table
                                                         Page 1 of 1

Command ==>                                              PF9  = Help
                                                         PF12 = Menu
```

This is the HEPPS Inquiry Screen.

To select a conversation, key the conversation number or conversation ID on the Command Line and press <ENTER>.

To exit, press PF12 three times.

Query Employee Screen:

```
 PPIQ2210                        HEPPS System                09:01:58  08/27/97
 QEMP EMP                          Employee

       SSN NNN-NN-NNNN
   WSU No 90122768                                   Initial Hire Date 01/15/76
     Name WILLOW,ROBERT                      Continuous Service Date 10/15/76
 Home Dept 6880  COMPARATIVE AMERICAN CULTURES
                           Status Active
                   Stat Reason Active Employee           WSU Prev Sv
  Perf Eval Yr    Emplmt Stat Date 10/00/76              St Prev Svc
   Tenure  Ind Y       Perm/Temp Permanent          Month Break Svc
   Tenure Stat T       Full/Part Full-Time               Work County 38
   Tenure Year 1979    Emplmt Type Faculty             Work Location PUL
  Grad/Fac Elg Y
                       --- Personal Data ---
 Date of Birth 11/29/26           Gender M               Citizenship US
  High Edu Lvl 12               Ethnicity 50          Visa Type Code
  Edu Level Yr 70            Handicap Code N           Visa Expr Date
                          Military Status


 Command ==>                                                   PF9  = Help
   PF4 = PF Key Help   PF6 = Picklist                          PF12 = Menu
```

To get to the Query Employee Screen, on a Command Line key:

> QE NNNNNNNNN   OR
> QEMP NNNNNNNNN   (N = Social Security Number)

Then press <ENTER>.

The Query Employee Screen displays employee information.

To view the I-9 data for this individual, key I9 on the Command Line and press <ENTER>.

To look at the Query Employee Screen for another individual, key their Social Security Number (without QE or QEMP) on the Command Line and press <ENTER>.

Query Employee I-9 Screen:

```
 PPIQ2220                        HEPPS System                09:29:32 08/27/97
 QE I9                           Employee/I9

        SSN NN-NNN-NNNN
   WSU No 10196783                                    Initial Hire Date 07/05/96
     Name MCGOVERN,GEORGE                      Continuous Service Date
Home Dept 0000
                            Status Active
                        Stat Reason Unknown                WSU Prev Sv
Perf Eval Mon     Emplmt Stat Date 07/05/96              St Prev Svc
  Tenure  Ind          Perm/Temp Temporary          Month Break Svc
  Tenure Stat          Full/Part Part-Time              Work County 38
  Tenure Year        Emplmt Type Hourly Staff         Work Location PUL

                       --- I9 Information ---

    I9 Form I9 Form on File                        Effective Date 07/05/96
Form Location Student Employment Office             Retention Date
                                                    Visa Type Code
             Authorization Expiration Date          Visa Expr Date

 Command ==>                                                     PF9  =Help
      PF4 = PF Key Help PF6 = Picklist  PF7 = Additional Functions PF12 =Menu
```

To get to the Query Employee I-9 Screen, on a Command Line key:

        QE NNNNNNNNN I9   OR
        QEMP NNNNNNNNN I9   (N = Social Security Number)

Then press <ENTER>.

The Query Employee I-9 Screen displays I-9 data.

To display this screen for another individual, key their Social Security Number on the Command Line and press <ENTER>.

Query Appointment Screen:

To get to the Query Appointment Screen, on the Command Line key:

```
        QE  NNNNNNNNN  APT        OR  (N = Social Security Number)
        QEMP  NNNNNNNNN  APT      OR  (N = Social Security Number)
        QAPT  NNNNNN                  (N = Appointment ID)
```

Press <ENTER>

```
 PPIQ2410                     HEPPS System              10:16:01  08/27/97
 QE APT                       Appointment


       SSN NNN-NN-NNNN                                  Begin Date 08/16/97
      Name WILLNAR,BETTER                                 End Date 99/99/99
     Jbcls 0290  PROFESSOR
 Appt Dept 6880  COMPARATIVE AMERICAN CULTURES                    Apt ID 435077


 Position ID 42292   Effort Percent 100.0000      Active/Inactive Active
   Job Class 290              Pay Rate 5555.62   Appointment Status Permanent
 Range/Step 159   A Full Time Rate 5555.62        Employment Type Faculty
   Brgn Unit               Appt Term 9.000          Work Schedule FNORM
 Temp Emp ID          PID\Perf Month 00               Work Period N/A


    Pay Affecting Yes                        Leave Indicator Not on Leave
   Pay Rate Code Monthly                   Leave Program Code
 Time Report Code Exception                Leave Reason Code 01
     O/T Eligible                          Leave Begin Date 08/16/88
 Salary Variance No                    Expected Return Date 01/01/89

 Command ==>
  PF4 = PF Key Help   PF6 = Picklist                            PF12 = Menu


 PPIQ2310                     HEPPS System              10:17:50  08/27/97
 QE APTSL                Employee/Appointment Select

       SSN NNN-NN-NNNN
      Name WILLNAR,BETTER


                   Appointments as of 08/06/97
                                                    T
 Sel  Posn  Titl  Begin   End    FT Rate  FTE    Pay Rate  m Py St Lv Ac TypDept
 --- ------ ---- ------ ------ -------- ----- ----------- - -- -- -- -- --- -
  1         0290 081693 999999                      0.00/  W  N  7  N  Y C 1250
  2   42292 0290 081697 999999  5555.62 1.0000 5555.62/M E  Y  1  N  Y   6880
  3   42292 0290 070197 081597  5555.62 1.0000 5555.62/M E  N  1  N  Y B 6880

 Enter Sel number and press <Enter>                            Page 1  of 1

 Command ==>
   PF4 = PF Key Help   PF6 = Picklist                           PF12 = Menu
```

If the individual has only one appointment, you will be taken directly to the appointment screen. If multiple appointments exist, you will be shown the *Employee/Appointment Select*. To view a specific appointment, key the 'sel' select number on the Command Line and press <ENTER>.

To view another individual's appointment, key their Social Security Number on the Command Line and press <ENTER>.

Query Employee/Appointment Select Screen:

To get to the Query Employee/Appointment Select Screen, on the Command Line key:

> QE NNNNNNNNN APTSL   OR (N = Social Security Number)
> QEMP NNNNNNNNN APTSL   (N = Social Security Number)

Press <ENTER>. This screen displays one or more appointments for this specified Social Security Number.

```
 PPIQ2310                      HEPPS System              10:38:55  08/27/97
 QE APTSL                Employee/Appointment Select

       SSN NNN-NN-NNNN
     Name VONFRANK,DELBERT J


               Appointments as of 08/06/97
                                                T
 Sel  Posn  Titl  Begin    End    FT Rate  FTE    Pay Rate  m Py St Lv Ac TypDept
 ---  ------ ---- ------ ------ -------- ----- ----------- - -- -- -- -- --- --
  1   38706  0290 081697 999999 7387.24 1.0000  7387.24/M E  Y  1  N  Y    1830
  2   38706  0290 070197 081597 7387.24 1.0000  7387.24/M E  N  1  N  Y  B 1830





 Enter Sel number and press <Enter>                              Page 1 of 1

 Command ==>
   PF4 = PF Key Help   PF6 = Picklist                           PF12 = Menu
```

To view a specific appointment, key the 'sel' select number on the Command Line and press <ENTER>.

To display this screen for another individual, key their Social Security Number on the Command Line and press <ENTER>.

To view previous appointments for this individual, key the word "all" on the Command Line and press <ENTER>. To return to the current appointments display, key the word "today" on the Command line and press <ENTER>.

Query Position Screen:

To get to the Query Position Screen, on the Command Line key:

          QE   NNNNNNNNN PSN   OR   (N = Social Security Number)
          QEMP NNNNNNNNN PSN   OR   (N = Social Security Number)
          QPSN NNNNNN   OR   (N = position ID)
          QP   NNNNNN   (N = position ID)

Press <ENTER>


```
PPIQ2510                       HEPPS System                    10:51:28  08/27/97
QE PSN                           Position

 Position 38706   VONFRANK DELBERT J     Area-Dept 10 1830  Begin Date 01/01/85
   Jobcls 0290    PROFESSOR                        ENGL         End Date 99/99/99
Empl Type Faculty                                          Cycle Begin 08/16/97
 Rng/Step                                                    Cycle End 05/15/98
                                                     Last Change Date 08/16/97
                                      Status Active
         Object 00               Inactive Reason              Perm/Temp Permanent
Accrual Cycle Pay Cycle             Posn Term 9.000       Service Basis Academic
  Work Period Non-Staff          Tuition Code N               Posn Type N
            On campus   Retiremt/Reemplmt N

                                                   Allocation Amount
          Allocn Pct     Effort Pct     Base Value      Month         Annual
          ----------    -------------   -----------   -----------   ------------
  Begin    100.0000                        6,833.56      6,833.56      61,502.04
  Current  100.0000       100.0000         7,387.24      7,387.24      66,485.16
  Future   100.0000                        7,387.20      7,387.24      66,485.16

Command ==>
  PF4 = PF Key Help   PF6 = Picklist                              PF12 = Menu
```


To display this screen for another individual, key their position number on the Command
Line and press <ENTER>.

Query Position/Assignment Screen:

To get to the Query Position Assignment Screen, on the Command Line key:

> QE   NNNNNNNNN PSN   OR   (N = Social Security Number)
> QEMP NNNNNNNNN PSN   OR   (N = Social Security Number)
> QPSN NNNNNN ASG   (N = position ID)

Press <ENTER>


```
 PPIQ2610                      HEPPS System              08:43:27  08/28/97
 QE ASG                     Position/Assignment

 Position 38706   VONFRANK DELBERT J     Area-Dept 10 1830  Begin Date 01/01/85
   Jobcls 0290    PROFESSOR                        ENGL       End Date 99/99/99
 Empl Type Faculty    Base Val 7387.24    Alcn% 100.0000   Cycle Begin 08/16/97
 Rng/Step            Allcn Amt 7387.24     Eff% 100.0000     Cycle End 05/15/98
 On campus   Annual Allcn Amt 66485.16     Term 9.000       Perm/Temp Permanent
              Work Period Non-Staff Tuit cd N           Service Basis Academic
 Sel Assg   Alloc         Assignments as of 08/07/97
 Num  ID    Grp/ET Type  Begin/End   $Month/Ann   Assg Pct  Fnd Ap Pgm Bdgt Ob Proj
 --- ------ - --- ----- --------- ---------- -------- --- -- --- ---- -- ----
  1  772886 1 RGA Alloc 08/16/97     7,387.24  100.0000  001-01-06D-2432-00-0001
                        05/15/98    66,485.16
  2  789859 1 RGA Base  07/01/98     7,387.24  100.0000  001-01-06D-2432-00-0001
                        99/99/99    66,485.16
  3  142329 1 RGA Expn  08/16/88               100.0000  001-01-06D-2432-00-0001
                        99/99/99


                                                             Page 1  of 1
 Command ==>
   PF4 = PF Key Help   PF6 = Picklist                          PF12 = Menu
```


To display this screen for another individual, key their position number on the Command Line and press <ENTER>.

Pay particular attention to the Assignment Begin and End Dates in the type of "EXPN" (expense) Column. The dates must be active during the current pay cycle for an individual to be paid.

To view previous assignments for this individual, key the word "all" on the Command Line and press <ENTER>. To return to the current assignments display, key the word "today" on the Command line and press <ENTER>.

List Positions Screen:

To get to the List Position Screen, on the Command Line key

    LP   OR
    LPSN

Then press <ENTER>.

```
 PPIQ2800                        HEPPS System            19:31:18   08/27/97
 LPSN STRT                    Position List Criteria


                      Job Class    ____

                      Account      ____ ____

                      Area         __

                      Dept         ____

Please enter one or more of the above criteria for the list of Positions you
want to examine.




 Command ==>
                                                         PF12 = Menu
```

The List Positions Screen displays user selection criteria and a list of the positions which match the criteria.

Name Search (University Name and Address File) Screen:

To get to the Name Search Screen, on the Command Line key:

       NS NNNNNNNNN   OR   (N = Social Security Number)
       NS TARGET NAME

Then press <ENTER>.

```
PPIQ3400                         HEPPS System               19:33:56   08/27/97
NS STRT                          Name Search

          +-------------- Associate File Name Search ---------------+
          |                                                         |
          |        Name _____       |
          |         SSN _____                                  |
          |                                                         |
          |           _ Matching (Default)                          |
          |           _ Logical                                     |
          |                                                         |
          +---------------------------------------------------------+
Command ==>
                                                   PF9 = Help  PF12 = Menu
```

The Name Search Screen displays name search criteria and search type selection.
Matching is the default and may be left blank.

The target name may be as few as one letter or as many letters as will fit in the input field.
(The more letters, the better.) If you key an abbreviated form of the last name and multiple
names where selected, use the PF10 key to scroll through all names until the desired name
is found.

To search for a specific name, end the target name with a comma (e.g., smith,). The target
may be made more specific by including a first name (e.g., smith,betty).

The format for a name is: last name
                              comma
                              first name
                              (no space)

Complete the name or SSN line, then press <ENTER>.

```
PPIQ3400                         HEPPS System               19:40:14   08/27/97
NS STRT                          Name Search

          +-------------- Associate File Name Search ---------------+
          |                                                         |
          |        Name SMITH,BETTY_____           |
          |         SSN _____                                  |
          |                                                         |
          |           _ Matching (Default)                          |
          |           _ Logical                                     |
          |                                                         |
          +---------------------------------------------------------+

Command ==>
                                                   PF9 = Help  PF12 = Menu
```

```
 Name                                          SSN       WSU No
 Street                          City               State  Zip
----------------------------------------------------------------------
_ SMITH,BETTY ANN                             NNN-NN-NNNN   98438803

_ SMITH,BETTY BOO                             NNN-NN-NNNN   90369339
  645 W LA HUNA                  HAPI                    CA 98023
_ SMITH,BETTY BOOP                            NNN-NN-NNNN   95447789

_ SMITH,BETTY JANE                            NNN-NN-NNNN   87653333
  795 SW TACO DR                 PULLMAN                 WA 99163
_ SMITH,BETTY MAE                             NNN-NN-NNNN   87223459
  900 234ᵗʰ SW                   MORRO BAY               CA 93442




                                                    Page 1  of 1

OMMAND ==>
  PF4 = PFKey Help    PF8 = Demogrph                      PF12 = Menu
```

If you know the Social Security Number, then that value may be keyed on the SSN line
instead of keying in the name.

The logical option will select the next best fit for the target name. Once a name is found,
use the PF4 key for additional help or PF8 to view demographic data and record type
codes.

To search for another name, key: NS TARGET NAME   on the Command Line and press
<ENTER> or press PF12 to return to the Name Search start screen and key in a target
name or a social security number.

Query Job Class Table:

To get to the Job Classification Screen, on the Command Line key:

        QJC NNNN   (N = Job Class ID)

Then press <ENTER>.

```
PPIQ3200                        HEPPS System                08:47:09   08/28/9
JCDISPLY                      Job Classification

Job Classification Id  3040                           Status Code  A
          Description  BUDGT ANALYST III              Status Date  06/05/92
                                    Effective Date  06 05 92 thru  99 99 99
        Employment Type  C                               Work Week  Y
   Current Range/Scale  46.0                         Job Group Code  34
            Work Study                            Calculation Routine
+------------------------------------------------------------------------+
|                                                                        |
|  Step          A          B          C          D          E          |
| Amount      2522.00    2583.00    2646.00    2713.00    2781.00        |
|                                                                        |
|  Step          F          G          H          I          J          |
| Amount      2849.00    2922.00    2992.00    3069.00    3146.00        |
|                                                                        |
|  Step          K          L          M          N          O          P |
| Amount      3225.00                                                    |
|                                                                        |
+------------------------------------------------------------------------+
Command ==>
  PF4 = PF Key Help    PF5 = Detail                        PF12 = Menu
```

The Job Classification Screen displays job classification information. Another job class may be displayed by keying: NNNN (N = Title Code) on the Command Line and press <ENTER>.

Query Position Appointment Select Screen:

To get to the Query Position Appointment Screen, on the Command Line key:

QP NNNNNN APTSL   (N = position number)

Then press <ENTER>.

```
PPIQ2320                      HEPPS System                  20:08:48  08/27/97
QP APTSL                    Position/Appointment

Position 38021  BEATTLE,BAILE          Area-Dept 30 7230  Begin Date 07/01/84
  Jobcls 0394    CHAIR & SCIENTIST               CAHEINFO    End Date 99/99/99
Emp Type Faculty    Base Val 5398.00    Alcn% 30.0000    Cycle Begin 07/01/97
Rng/Step           Allcn Amt 1799.32     Eff% 30.0000        Perm/Temp Permanent
On campus  Annual Allcn Amt 21591.84     Term 12.000    Service Basis Annual
               Work Period Non-Staff Tuit cd N
Appointments as of 06/01/97                                T P S L A T
  Employ Name    Titl Begin   End    FT Rate   FTE    Pay Rate  M Y T V C Y Dept
  ------------ ---- ------ ------ -------- ------ ---------- - - - - - - ----
1 BEATTLE,BAILE 0394 072695 063097  5118.68 0.3000  1706.22/M E Y 1 N Y   7230
2 BEATTLE,BAILE 0394 070197 999999  5398.00 0.3000  1799.32/M E Y 1 N Y   7230




                                                      Page 1  of 1
Command ==>
 PF4 = PF Key Help   PF6 = Picklist                       PF12 = Menu
```

This screen displays one or more appointments for the specified position number.

To view a specific appointment, key the number to the left of the individual's last name on the Command Line and press <ENTER>.

To display this screen for another position, key the position number on the Command Line and press <ENTER>.

To view previous appointments for this individual, key the word "all" on the Command Line and press <ENTER>. To return to the current appointments display, key the word "today" on the Command line and press <ENTER>.

Query Account Screen:

To get to the Query Account Screen, on the Command Line key:

               QACT bbbbpppp   (b = budget   p = project)

Then press <ENTER>.

```
 PPIQ3310                        FACTS System              08:49:52  08/28/97
                               Query Account

 Account Num: 241900010
 +----------------- BDGT SUBSIDIARY ACCOUNT SELECTION LIST ----------------+
 |  Sel  Begin date    Ending date    Bdgt Subs Acct Num Title             |
 |   _   02/26/1997    99/99/9999    WAMI MEDICINE                         |
 |   _   04/26/1994    02/25/1997    WAMI MEDICINE                         |
 |   _   06/23/1993    04/25/1994    WAMI MEDICINE                         |
 |   _   02/04/1991    06/22/1993    WAMI MEDICINE                         |
 |   _   07/02/1989    02/03/1991    WAMI MEDICINE                         |
 |   _   07/01/1985    07/01/1989    WAMI MEDICINE                         |
 |                                                                         |
 |                                                                         |
 |                                                                         |
 |                                                                         |
 |                                                                         |
 |                                                                         |
 |                                                                         |
 |   Mark Sel field to select BDGT SUBS ACCT NUM RECORD       Page 1  of 1 |
 +-------------------------------------------------------------------------+
 Command ==>
                                                            PF12 = Menu
```

The Query Account Screen gives the account attributes for the specified budget/project from the Financial Accounting System (FACTS).

To query another account in FACTS, key the budget/project on the Command Line and press <ENTER>.

Query Allocation Adjustment Detail Screen:

To get to the Query Allocation Adjustment Detail Screen, on the Command Line key:

        ALCN   OR
        QALCN NNNNN   OR (N = position number)
        QP NNNNN ALCN   (N = position number)

Then press <ENTER>.

```
PPIQ4200                        HEPPS System                    20:25:08   08/27/97
QACRL ACRL                      Accrual Detail
 Position 76589                                             Accruals as of 07/01/97
     Name HAPPY, GOLUCKY
 Pay           Retro      Alloc      Expense     Accrual    Accruals    Accruals
 Cyc ET  RSN   Period     Dollars    Dollars     Dollars      from         to
 --- --- ---  --------   ---------  ---------   ---------   ---------   ---------
 071 REG 06               1491.68    1499.44       7.76-    4102-5016   9941-0901
 072 S/D 03    7/15/97       7.76       0.00       7.76     4102-5016   9941-0901
 081 REG 33    7/31/97       0.00    1349.50-    1349.50    4102-5016   9941-0901
 081 REG 32    7/31/97       0.00    1349.50     1349.50-   4102-5016   9941-0901
 081 S/D 32    7/31/97       0.00     149.94      149.94-   4102-5016   9941-0901
 081 S/D 33    7/31/97       0.00     149.94-     149.94    4102-5016   9941-0901




                                                          Page 1     of 1
Command ===>
  PF4 = PF Key Help                                                  PF12 = Menu
```

Contact your Area Finance Officer or the WSU Budget Office representative if you have questions about allocation adjustments.

To view allocation adjustments for another position, key the position number on the Command Line and press <ENTER>.

Query Base Adjustment Detail Screen:

To get to the Query Base Adjustment Detail Screen, on the Command Line key:

BASE		OR	
QBASE NNNNN		OR	(N = position number)
QP NNNNN BASE			(N = position number)

Then press <ENTER>.

```
PPIQ4220                        HEPPS System                    20:28:25   08/27/97
 QP BASE                     Base Adjustment Detail

Position 76589                                     Adjustments as of 07/01/98
    Name HAPPY, GOLUCKY
 Pay Earn        Change      Prev         Adj        New      Adjusted  Adjusted
 Cyc Type Rsn    Date        Alloc       Amount      Alloc      From       To
 --- ---- --- --------    ---------- ---------- ---------- --------- ---------
 071 CHR         07/01/98                 3412.44    3412.44  9841-0901 4102-5016
 071 REG         07/01/98                30712.08   30712.08  9841-0901 4102-5016
 071 REG  511 07/01/97     30712.08      1675.92   32388.00  9841-0901 4102-5016
 071 S/D  511 07/01/97      3412.44       186.12    3598.56  9841-0901 4102-5016




                                                                 Page  1  of 1
Command ==>
  PF4 = PF Key Help                                              PF12 = Menu
```

Contact your Area Finance Officer or the WSU Budget Office representative if you have questions about base adjustments.

To view base adjustments for another position, key the position number on the Command Line and press <ENTER>.

Query Accrual Detail Screen:

To get to the Query Accrual Detail Screen, on the Command Line key:

        ACRL   OR

        QACRL NNNNN   OR (N = position number)

        QP NNNNN ACRL   (N = position number)

Then press <ENTER>.

```
PPIQ4200                       HEPPS System                  20:34:20   08/27/97
QP ACRL                        Accrual Detail

  Position 76589                                        Accruals as of 07/01/97
      Name HAPPY, GOLUCKY
  Pay            Retro      Alloc     Expense    Accrual   Accruals   Accruals
  Cyc ET  RSN   Period     Dollars    Dollars    Dollars     from        to
  --- --- ---  --------   --------- ---------  --------- --------- ---------
  071 REG 06               1491.68    1499.44      7.76-  4102-5016 9941-0901
  072 S/D 03    7/15/97       7.76       0.00      7.76   4102-5016 9941-0901
  081 REG 33    7/31/97       0.00    1349.50-  1349.50   4102-5016 9941-0901
  081 REG 32    7/31/97       0.00    1349.50   1349.50-  4102-5016 9941-0901
  081 S/D 32    7/31/97       0.00     149.94    149.94-  4102-5016 9941-0901
  081 S/D 33    7/31/97       0.00     149.94-   149.94   4102-5016 9941-0901




                                                          Page 1     of 1
 Command ===>
   PF4 = PF Key Help                                              PF12 = Menu
```

Contact your Area Finance Officer or the WSU Budget Office representative if you have questions about accruals.

To view accrual details for another position, key the position number on the Command Line and press <ENTER>.

Query SCAN Distribution Table:

To get to Query SCAN Distribution Table, on the Command Line key:

      QRYSCAN

Then press <ENTER>.

```
PPIQ5620                    Payroll EXEC System            20:41:51   08/27/97
QRYSCAN  STRT           Qry Scan Distribution Tbl




           +----------------------------------------------------+
           |   Bdgt Proj    Zip    Department Name   AIS User ID |
           |   ____  XXXX                                        |
           |                                                     |
           |                                                     |
           |                                                     |
           |                                                     |
           +----------------------------------------------------+




PF1 = Display file                      PF3 = Display zips
                                                     PF12 = Menu
```

Either key a specific budget/project and then press <ENTER> OR proceed to choose either PF1 or PF3.

This conversation displays the accounts and their HEPPS User ID's for access to the secured HEPPS conversation known as DEPTPAY for the reporting of hours worked or pieces completed.

Query PEAR Distribution Table:

To get to Query PEAR Distribution Table, on the Command Line key:

        QRYPEAR

Then press <ENTER>.


```
PPIQ5630                    Payroll EXEC System              20:43:19   08/27/97
QRYPEAR  STRT             Qry PEAR Budget/Zip Table

              +---------------------------------------------------+
              |          Budget:  ____                            |
              |         Project:  XXXX                            |
              |                                                   |
              |       Zip Code:                                   |
              |      Dept Name:                                   |
              |     Dept Phone:                                   |
              |   Alt Zip Code:                                   |
              |    County Code:                                   |
              |        PROFS ID:                                  |
              |       Print Ind:                                  |
              |     AIS User ID:                                  |
              |                                                   |
              |                                                   |
              |                                                   |
              |                                                   |
              +---------------------------------------------------+

PF1 = Display File                        PF3 = DISPLAY ZIPS
                                                  PF12 = Menu
```


Either key the specific budget/project and then press <ENTER> OR proceed to choose
either PF1 or PF3.

This conversation displays the accounts and their HEPPS User ID's for access to the
secured HEPPS conversation known as DEPTPAY for the reporting of payroll expenses.

Query Data Dictionary:

To get to Query Data Dictionary, on the Command Line key:

       QDATA

Then press <ENTER>.


```
|                                                  20:45:51  08/27/97
  Mark to select a Data Entity:          | --------
                                   Text   | IVERSITY
  _   Accrual                       Y     | --------
  _   Allocation                    Y     |
  _   Appointment                   Y     | P    PPPPPPPPP      SSSSSSS
  _   Assignment                    Y     | PP  PPPPPPPPPPP   SSSSSSSSSS
  _   Employee                      Y     | P  PPPP   PPPP  SSSSS    SSSS
  _   Encumbrance                   Y     |  PPPP    PPPP    SSSSSS
  _   Expense                       Y     |  PPPPPPPPPP       SSSSS
  _   Job Class                     Y     | PPPP        SSSS     SSSSS
  _   Pay Scale                     Y     | PPP          SSSSSSSSSSSS
  _   Position                      Y     | PP           SSSSSSSSSS
                           Page 1 of 2    |
                                          |
  PF10 = Forward         PF11 = Back      | -----------
  PF7  = Text            PF12 = Exit      | STEM
                                          | -----------
------------------------------------------+
                      Press <ENTER> for Command Menu

COMMAND ==> QDATA
                                                        PF12 = EXIT
```


Key an **X** on the entities which you are interested in viewing.

Most of the data on the Query Employee Screen is from the Employee entity. Most of the data on the Appointment Screen is from the Appointment entity, etc.

The Data Dictionary explains the values allowed for each element within each entity. Examples of elements are: name, address, VISA type, etc. You will be provided with a brief description (see PF7 Text) of each element. See PF6 for the allowable values for an element.

Query Payroll Expense:

To get to Query Payroll Expense, on the Command Line key:

      *QPREXP NNNNNNNNN   OR   (N = Social Security Number)
      QPREXP NNNNN   (N = position number

Then press <ENTER>.

    *When using this option, wipe out the position number or expenses
     will be displayed just for that position number.

Complete the "pay cycle end date" selection dates and then press <ENTER>.

```
PPIQ3640                         HEPPS System                20:50:32  08/27/97
QPREXP                        Query Payroll Expense

         Name                 Status Code and Date  Perm-Temp  Last Paymnt
    SMITH,VICTOR                   A 08/07/89           P        08/15/97


      +----------------------------------------------------------------+
      |                                                                |
      |    Selection Criteria:  SSN: NNNNNNNNN  Pos. No.: _____       |
      |                                                                |
      |    Selection Qualifier: Pay cycle end date from 12 16 96       |
      |                                        thru 12 31 99           |
      |                                                                |
      +----------------------------------------------------------------+
             108 record(s) with this SSN have been selected.
             Reinput data or press PF1 to display records.


         Total Hours         Total Amount          Total Months
          1400.00              45965.00               8.0000
Command ==>
          PF1 = Payroll Expense Detail                      PF12 = Menu
```

This will summarize the records found. Press <ENTER> again to view expense details.

```
PPIQ3640                         HEPPS System                20:52:54  08/27/97
QPREXP                        Payroll Expense Detail

         Name                 Status Code and Date  Perm-Temp  Last Paymnt
    SMITH,VICTOR                   A 08/07/89           P        08/15/97
    SSN NNN-NN-NNNN
Sel PayCy Tr Ern                              Prexp      Prexp      Staff Pay Cy
Num Ernd Cd Typ  Fnd AP Pgm Bdgt Proj Ob       Hrs        Amt      Months  Paid
1 123196 AU FED  001 01 06M 2142 0001 00      19.20     511.87     0.1000 123196
2 123196 AU FCH  001 01 06M 2142 0001 00                 56.88            123196
3 123196 AU FED  001 01 10A 3042 0800 00      28.80     767.80     0.1500 123196
4 123196 AU FCH  001 01 10A 3042 0800 00                 85.31            123196
5 123196 AU FED  001 01 09A 4102 5016 00      48.00    1279.67     0.2500 123196
6 123196 AU FCH  001 01 09A 4102 5016 00                142.19            123196
7 011597 AU FED  001 01 06M 2142 0001 00      17.60     511.87     0.1000 011597
8 011597 AU FCH  001 01 06M 2142 0001 00                 56.88            011597
9 011597 AU FED  001 01 10A 3042 0800 00      26.40     767.80     0.1500 011597
Cumulative Totals                            140.00    4180.27     0.7500
```

```
Command ==>
 PF4 = PF Key Help    PF5 = Decode      PF10 = Forw              PF12 = Menu
```

To view contribution details, key the 'sel' selection number on the Command Line and press <ENTER>. Contributions are the amounts paid by the University on this individual's behalf.

```
PPIQ3640                      HEPPS System              20:52:54  08/27/97
QPREXP                     Payroll Expense Detail

         Name                 Status Code and Date  Perm-Temp  Last Paymnt
   SMITH,VICTOR                  +------------------------------------+
   SSN NNN-NN-NNNN               |                                    |
Sel PayCy Tr Ern                 |          Contribution  Detail      | ay Cy
Num  Ernd Cd Typ  Fnd AP Pgm Bdgt|          CPY 97 000979122          | Paid
1 123196 AU FED   001 01 06M 2142 |                                    | 23196
2 123196 AU FCH   001 01 06M 2142 | Sel Num:      7   Prexp:    511.87 | 23196
3 123196 AU FED   001 01 10A 3042 | Hours:    17.60   Contrib:  100.36 | 23196
4 123196 AU FCH   001 01 10A 3042 | Stf M:   0.1000   Ck/Adv:  ANNNNNN | 23196
5 123196 AU FED   001 01 09A 4102 |                                    | 23196
6 123196 AU FCH   001 01 09A 4102 | GTN Cd  GTN Descn   Sobj    GTN Amt| 23196
7 011597 AU FED   001 01 06M 2142 |  198   UNEMPLOY CON  MA       0.51 | 11597
8 011597 AU FCH   001 01 06M 2142 |  095   HCA           MB      56.61 | 11597
9 011597 AU FED   001 01 10A 3042 |  221   FD MED 1.45%  KD       7.41 | 11597
Cumulative Totals                 |  205   FED RET 7%    KB      35.83 |
                                  |                                    |
Enter Sel num to view Contributio |                                    |
                                  |                    Page: 1  of 1   |
Command ==> 7                     |                    PF12 =Exit      |
 PF4 = PF Key Help    PF5 = Decod +------------------------------------+ Menu
```

See PF4 and PF5 keys for additional functions.

Query Tenure:

To get to Query Tenure, on the Command Line key:

      QTR NNNNNNNNN   (N = Social Security Number)

Then press <ENTER>.

```
PPIQ3500                        HEPPS System                20:59:51   08/27/97
QTNR TENURE                     Query Tenure

     SSN NNN-NN-NNNN                            Initial Hire Date 08/07/89
    Name SCOTT, BRETT                    Continuous Service Date 08/07/89
Home Dept 7230   CROPS AND SOILS             Emplmt Status Date 08/07/89

Status T
Status Year 1989

                Job Class      Dept     Subject       FTE
                ---------      ----     -------     --------
                  0290         7230      0015        0.2000
                  0390         7230      0015        0.3000
                  0591         7230      0015        0.5000




                                                          Page 1  of  1
Command ==>
 PF4 = PF Key Help   PF6 = Picklist                      PF12 = Menu
```

The Query Tenure Screen displays tenure data. To look at tenure data for another individual, key their Social Security Number on the Command Line and press <ENTER>.

Query Temp:

To get to Query Temp, on the Command Line key:

        QTEMP

Then press <ENTER>.

```
PPIQ2700                        HEPPS System              21:04:06   08/27/97
STRT                         Query Temp Employment


          Please specify one of the following keys and press 'ENTER'.

          Processing will continue based on the key specified.


          Query TEMPORARY JOBS by:

                    Temp. Job Id:  _____

                        Dept Id:  ____




Command ==>
          PF3  = FAMS                                            PF12 = Menu
```

Key the temporary job ID and press <ENTER>. The temporary job ID is found on the Appointment Screen. The appointments displayed for this job ID may be more current than the job roster which is sent monthly from CSHEO. Contact CSHEO with any questions about this data.

Key in the department number instead of the temporary job ID and press <ENTER>. The active temporary job ID's for this department will be displayed.

To go to the Financial Aid System (FAMS) to confirm work study limits, press PF3. Key in the student's WSU ID number and session, then press <ENTER> to view work study awards.

```
FAWD7260                    Financial Aid System        21:24:02   08/27/97
JOB                    Work Study Authorization Information

 WSU Id: 999996544 SSN: NNN-NN-NNNN Name: BROWN, RONALD     FY 1998 AP

 Authorized Period of Employment for Fall:    08/16/1997 through 12/31/1997
 Authorized Period of Employment for Spring: 01/01/1998 through 05/15/1998

               Awarded  Awarded   Awarded    Earned   Earned   Earned
 Fund   Source  as of  Fall Sem  Sprg Sem    as of   Fall Sem  Sprg Se
 -----  ------- ------- --------- ---------  ------- --------- -------
 U/351 STATE    07/06/97  800.00    800.00

                        --------- ---------           --------- -------
               Totals    800.00    800.00
                                              PF1 = Select Screen
               _____  PF5 =  DECODE  PF12 = Return
```

Just because you can view the work study award in FAMS does not necessarily mean the
same limit is present in the HEPPS System. Limits are displayed in HEPPS on the Positive
Pay Time transactions as well as on the Payroll Expenditure Audit Reports within the
secured HEPPS conversation called DEPTPAY.

GLOSSARY OF HEPPS TERMS

Academic Appointment: An appointment for the nine-month period corresponding to the appropriate academic calendar. This is a special kind of cyclic appointment. This type of appointment is not used for classified staff or administrative professional.

Account: Budget-project combination which defines a specific economic activity. The account is used as the key for the Master Account Table and may be used to derive the remaining elements of the coding (e.g., fund, appropriation, program).

Account Entity: A primary entity which provides financial resources for a position.

Accrual: When there is a difference between what is allocated per pay cycle versus what is expensed, an accrual occurs. This term of accrual is somewhat misnamed and would be better understood if it were termed 'allocation adjustment'. An accrual is a flow of dollars from one account to another. An accrual occurs when there is a difference between what is planned versus what has actually happened.

AIS: Administrative Information Systems. Terminal control for accessing on-line systems at Washington State University.

ALC: Annual Leave Cashout. Earnings type used when paying terminal annual leave hours above 240 for classified staff on separation. These earnings are not subject to PERS deductions.

Allocation: The process by which Washington State University specifies where the state appropriated dollars are to be expended.

ALP: Annual Leave Payoff. Earnings type used when paying the first 240 hours of terminal annual leave for classified staff. These earnings are subject to PERS deductions.

Annual Appointment: An appointment for twelve months

Appointment Entity: A transactional entity which manages the relationship between employee and position.

Appointment Forms: Personnel forms which establish, change, maintain or conclude the employee/employer relationship between an employee and WSU for the performance of specific duties at an agreed-on rate of compensation and other considerations.

Appointment Splits: When specific appointment elements are changed, the target appointment end date is set to the day prior to the action effective date, retaining the original appointment information as history. A copy of the original appointment is created with its begin date equal to the action effective date. This allows for appointment history to be automatically created. The new appointment carries the changed information.

Appointment Status: An indicator of the condition of the appointment (e.g., active, inactive, temporary, probationary, etc.).

Appropriation: A state appropriation is legislative authorization to incur expenditures for

specific purposes and limited as to time and amount from designated resources. All other appropriations are categorizations for internal funds management. Appropriation is indicated by a two-digit numeric code appended to fund.

Appt ID: Appointment ID. The key used to link appointment with employee and position.

Appt Status: Abbreviation for appointment status. (See Appointment Status.)

Assg ID: Assignment ID. The key used to link assignment with position and account. A sequential numerical reference to a particular account assignment line.

Assignment Entity: A transactional entity which manages the relationship between position and account.

Base Value: The full-time salary assigned to a position, excluding stipends and differentials.

BSH: Base Scheduled Hours. The hours scheduled to be worked in the pay period.

Budget: Numeric code for a recognized function within the institution. Used by payroll to charge expenses and designate responsible unit.

Carry Forward: When a change is made to an appointment, the same elements in future appointments with the same keys (SSN, PSN-ID) are changed. This applies to both appointments in the APPOINTMENT storage and to appointments represented by transactions in the queue.

Cash Advance: The advance of approximately seventy percent of expected earnings to an employee instead of a Hand-drawn Check. The advance is processed through the Controller's Office. The dollar amount of the advance is recovered on the following check by a one-time deduction.

Classified Staff: All employees under the jurisdiction of the Department of Personnel as defined by RCW 28B.16.

Coding: The grouping of fund, appropriation, program, sub-program, budget, object and project.

CTP: Compensatory Time Off.

Cutoffs: The dates established for processing documents (e.g., receiving, batching, mailing, etc.). The dates by which certain activities must be performed.

Cyclic Year Position: A position scheduled to work for less than twelve full months each year (excluding academics), due to known, recurring periods in the annual cycle when the position is not needed.

Data Element: The smallest logical piece of information stored in a computed file. This piece of information is referenced by a data element number.

Data Entry: That unit of the Computing Center which enters batch data into the computer system.

Declining Balance: The balance owing on a deduction which is taken in installments.

Deduction: A gross-to-net element amount which is subtracted from gross earnings. This amount does not reduce the Federal Income Tax subject gross.

Deductive: That which is deducted without reducing the Federal Income Tax subject gross.

Direct Deposit: The electronic transfer of payments to any bank in the U.S. which is a member of an automated clearing house. (See ACH)

Dynamic Maintenance: A process to automatically define values for certain fields not entered through user input. Dynamic maintenance transactions are created based on selected HEPPS data and any transactions created during the maintenance process or existing in the queue. An example is EMP-EMPLOYMENT-STATUS-CD: dynamic maintenance "looks" at all appointments as of the effective date of the maintenance activity, and defines the employment status as ACTIVE if active appointments exist or SEPARATED if there are no active appointments.

Earnings Type: A three-character unique description used to identify the category of earnings (e.g., REG is used for regular pay).

EDC: Entity Data Change. A change or addition to entity data processed by the payroll office and input on an Entity Data Change Form or from a Temporary Employment Appointment Form.

Edits: The listing, count and error reports generated when payroll transactions are verified against the Payroll Master File and certain edit routines to validate the accuracy/logic of the input information.

Effort %: This is the percent of appointment that the position will support.

EIC: Earned Income Credit. An advance-of-filing refund of Federal income tax based on expected earned income, filing status, non-excludable income, maintenance of a household and at least one dependent child. (See specific requirements on the Earned Income Credit Advance Payment Certificate (W-5).)

Employee Entity: A primary entity which encompasses collected data on those individuals who perform services for the university which can be controlled by the university as employer.

Employee Types: Those terms which categorize an employee's type of service (e.g., classified staff, faculty, graduate assistant, etc.).

Encumbrance: Estimated charges obligated but not yet disbursed for salaries and employee benefits. These estimates are based on start dates, end dates, FTE's, earnings types and benefits indicators input from Personnel Action Forms and Employee Benefits Enrollment Forms into the payroll system and translated to the accounting system. (Encumbrances can also be incurred for other university obligations.) That subset of projected payroll expenses that is fed to account.

Entity: A subject that we collect or maintain data about.

Entity Data Change: (See EDC.)

Entity Storage: The physical file which contains the data collected pertaining to an entity.

ETD: Employment To Date. Selected dollar and hour balances computed since the start of employment with WSU or since start-up of the balance, whichever is most recent.

ETRF: Expenditure Transfer Request Form. The form used to request that expenditures be transferred between funding sources. This should be used to request transfers when they do not reflect continuing changes in funding source nor adjustments to effort previously certified on an Effort Certification Report.

Exempt: Former common reference name for Administrative and Professional personnel. Includes all employees "exempt" from the provisions of the Higher Education Personnel law and Department of Personnel rules. This should not be confused with FLSA exempt.

Exempt Status: The status pertaining to exclusion from Federal Income Tax. Code 98 indicates a W-4-Exempt on file for exemption from FIT. Code 99 indicates no tax liability is anticipated (e.g., working outside the US or on limited retirement supplementation). Code 97 indicates a non-US citizen working out of country. Code 96 indicates exemption via a Tax Treaty.

Exemptions: Another term for withholding allowances from Federal income tax.

Expense Assignment Actions: A form which is used to change only expense assignment account coding. This coding is used for charging payroll expenses.

Expense Transfer: The transferring of identifiable direct charges for payroll expenses and, optionally, related employer costs from one funding source to another. (Uses transaction types E1, E2 and E3.)

Faculty: Teachers, researchers, public service professionals, counselors, librarians, and administrators responsible for directing and achieving the primary missions of the university, excluding employees within the administrative and professional personnel classification.

Fed Med: Federal Medicare.

Federal Tax Marital Status: The marital status shown on the W-4 Form for Federal income tax withholding purposes. This may not be the actual marital status as in the case of married but withholding at the higher single rate. Here, the actual marital status is married while the Federal tax marital status is single.

FICA: Federal Insurance Compensation Act. (See social security.)

First Half: The payroll period which begins on the first day of the month and terminates on the fifteenth of the month.

FIT: Federal Income Tax.

FLSA: Fair Labor Standards Act.

FTE: Full Time Equivalent. The percent of a full-time assignment (of duties) that an employee will work in an appointment to a position over a specified period of time. This value is derived from the definition of a full-time work load.

Fund: An accounting entity which carries limitations and restrictions on the use of the associated resources and identifies the source of monies (e.g., state, local, federal).

GTN: Gross-to-Net. The gross-to-net process calculates net pay by subtracting reductions and deductions from each employees' gross pay. Gross-to-net elements indicate which reductions and deductions should be taken.

HDC: Hand-drawn Check. A manually calculated and prepared payroll check. (Uses transaction types H1, H2 and H3.)

HEPPS: Higher Education Payroll/Personnel System. The acronym used to describe the WSU Human Resources Management System which consists of Payroll, Personnel, Position Control, Central Database and Data Maintenance.

HEPPS Data: Elements in HEPPS storages required for Human Resource management.

HEPPS Entities: Entities required to meet the business requirements of Human Resource Management. Primary entities (e.g., EMPLOYEE, POSITION, ACCOUNT) stand alone without other entities. Transactional entities (e.g., APPOINTMENT, ASSIGNMENT) link stand alone entities. Employees are appointed to positions which are assigned accounts.

HEPPS Storages: The data files necessary for storage of HEPPS entities.

HEPPTRAN: The transaction process and file for data changes and additions to the HEPPS storages which are input by the Payroll Office staff on EDC's and/or TEA's.

Hourly: Those employees who work on a unit basis of pay with hour as the unit.

Job Class: A category of duties and responsibilities as defined by WSU or the DOP. (Also known as title description.)

Job Group: A grouping of jobs within an EEO-6 classification that have similar job content, wage rate and promotional opportunities.

Journal Voucher (JV): A document used to create or change transactions in the accounting system.

Leave Reports: Form used to record leave activity for faculty and administrative and professional personnel.

LWOP: Leave Without Pay.

Manual Check: A manually calculated and prepared payroll check. Also known as a Hand-drawn Check (HDC).

Medical Aid: Medical expense payment provision for employees injured on the job.

Medicare: Medical expense payment provision for people sponsored by Social Security.

Non-resident: Any person in this country on a visa which is not issued as a resident alien or immigrant type.

OASI: Old Age Survivors Insurance.

Object: A two-digit code which identifies expenditure type (e.g., 00 = salary , 01 = wage, 07 = employee benefit, etc.).

OFM: Office of Financial Management (Olympia).

Operating Fee Waiver: That portion of tuition scholarships, excluding activity fees, provided to qualifying graduate assistants.

OVP: Overpayment. A transactional input document processed to recover an excessive payment. (Uses transaction codes O1, O2 and O3.)

PAF: Personnel Action Form. The form required to initiate or change appointment/payment of all salaried employment, faculty timecard employment, courtesy appointments and non-service payments. (Also see appointment forms.)

PAR: Payroll Audit Report. A list, by employee, which details their payroll computation (e.g., time, type of pay, gross pay by funds, amount of each reduction/deduction/contribution, adjustment activity, disbursement activity, balances, etc.).

Payroll Documents Calendar: The schedule specifying due dates for payroll related documents by pay cycle.

PEAR: Payroll Expenditure Audit Report. Report of the current pay period payments and any retroactivity for preceding pay periods.

Perquisite: Additional non-salary compensation for an employee. Given a dollar value for benefits calculations (e.g., room, board).

PID: Periodic Increment Date. The date upon which a classified staff employee is scheduled to move to a higher salary step within the range for his/her current class. The PID process is the mechanism by which these increases are formatted into payroll, personnel and position control transactions for update to the appropriate files.

Piece: Those employees paid on the basis of dollars per units completed with units completed equal to the number of pieces.

Position Actions: The forms used to show on-going changes to positions. These forms are to indicate changes to positions which are intended for the duration of the position based on currently available information.

Position Control: The office involved in the process of creating and modifying positions within HEPPS. This section manages units of human and financial resources known as positions.

Position Entity: A primary entity which describes a uniquely identifiable set of duties and responsibilities and its concurrent financial resource requirements.

Position ID: Also referred to as position number.

Program: Part of a code which signifies the various operating functions within the university (e.g., instruction, administration, research). Program is the numeric portion of the full code. (See also Sub-program.)

Project: Local numeric code classification which is a subdivision of a recognized institutional function indicated by the budget.

Projected Payroll Expense: An estimate of future costs of salaries and benefits. This differs from encumbrance because we can calculate project payroll expense for all employee-appointment-position-assignment-account, yet we may only feed a subset of these projected payroll expenses to accounting.   We also summarize benefit encumbrances by employee type in accounting, while they are not summarized as a Projected Payroll Expense.

RA, Research Assistant: Matriculating students, either graduate or undergraduate, whose primary responsibilities are related to research.

RA, Retroactive Adjustment: Gross pay adjustment which applies to a prior pay period. RA is the transaction type of this adjustment.

Range: A pay scale for specific job classifications.

Recovery: The process of regaining an excessive payment. A recovery is entered into the payroll system as an overpayment. (See OVP.)

Reduction: A gross-to-net element amount which is subtracted from gross earnings and also reduces Federal income tax subject gross.

Reductive: That which is deducted while also reducing Federal income tax subject gross by an amount equal to the amount of the deduction.

Replacement Check: A manually prepared check issued as a substitute for a lost or stolen check.

SA: Staff Assistant. Matriculating student, either graduate or undergraduate, whose primary responsibilities are related to public service and/or administrative assistance.

Salaries: Fixed compensation periodically paid to employees for regular work. (Object 00 expenses.)

Second Half: The payroll period which begins on the sixteenth of the month and terminates on the last day of the month.

SH: Staff Hour. One person's full-time effort for one hour.

SHE: Staff Hour Equivalent. The percent of a full-time staff hour (SH) that an employee will work in an appointment over the period of an hour.

SM: Staff Month. One person's effort for one month.

SME: Staff Month Equivalent. The percent of a full-time staff month (SM) that an employee will work in an appointment over the period of a month.

Social Security: An insurance plan, relating to life insurance and old age pensions, offered/required by the Federal government to specified groups of the population, on a contributory basis.

SSN: Social Security Number. The unique number assigned by the Social Security Administration to each individual's Social Security account. This number is necessary for employment.

STD: Semester to Date. Selected dollar and hour balances computed since the start of the semester and zeroed before the start of the next semester (e.g., work study earnings STD).

Step: A one-character code identifying the horizontal position of the employee on the pay range of their appointment.

Sub-fund: (See appropriation.)

Sub-object: A two-digit alpha code to further breakdown object into more detailed categories.

Sub-program: Part of the code which signifies the various operating functions within the university (e.g., instruction, administration, research). The alpha portion of the code. This portion of the code also indicates the agency for grant and contract funding sources. (See also Program.)

Supplemental Pension Tax: Part of the Medical Aid contribution by WSU.

TA: Teaching Assistant. Matriculating student, either graduate or undergraduate, whose primary responsibilities are related to teaching.

TEA: Temporary Employment Appointment form. The form used to establish or change the appointments for temporary, occasional employees. This form carries the transaction types/information which feeds PAYTRAN and HEPPTRAN.

Time Report Forms: Used to report attendance, leave and overtime for classified staff.

Title Code: A code specifying a category of duties and responsibilities as defined by WSU or the DOP (also known as job class code).

Visa Types: The types of endorsements given by an authorized representative of a country to foreigners wishing entrance to the country for various purposes. The type of visa indicates the desired purpose and carries with it certain restrictions pertaining to various

activities such as employment.

Wages: Compensation paid to employees on an hourly or piece basis. (Object 01 expenses.)

Withholding Allowances: Allowable exemptions from Federal income tax for self, spouse, age, blindness, and dependents.

W-2 Forms: Wage and Tax Statement. The form used to report wages, tips, other compensation, withheld income and social security taxes, and advance earned income credit payments to the IRS, the Social Security Administration and the employee.

W-4 Forms: Employee's Withholding Allowance Certificate. Required by Federal law to be on file with the Payroll Office before any salary or wage payments are made.

YTD: Year-to--Date. Selected dollar and hour balances computed since the start of the calendar year or since start-up of the balance, whichever is most recent (e.g., withholding covered gross YTD). These balances are zeroed before the start of the next calendar year.