Module 6 Contents

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**Mandatory Reviewers**

Mandatory reviewers are individuals who are authorized to review changes and updates to the employee database. For quality and internal control purposes, each Post-Authorization Notification (PAN) must be reviewed by one or more mandatory reviewers.

⚠️ Mandatory reviewers should not be subordinate to their preparers. In addition, preparers cannot be mandatory reviewers for their own work.

⚠️ Mandatory reviewers must review their PANs within a reasonable amount of time. The specific rules regarding the timeliness of review are determined on a department-by-department basis.

**Preparation a PAN**

You will automatically be brought to the Notification Preparation Screen whenever you perform an update that generates a PAN (see Figure 6-1).

The top section of the Notification Preparation screen identifies the PAN to be sent, and the information about the preparer. The next section of the screen lists the Address, Type, and Name of each user who will receive the PAN.

The **UserID** field displays the recipient's userid or e-mail address.

The **Type** field displays the type of PAN. Five types are valid:

- **M** Mandatory
- **F** Forwarded
- **U** User-defined
- **R** Reviewer (not mandatory)

In addition, a specific mandatory reviewer (M) can be assigned as the primary reviewer in the **Primary** field:

- **P** Assigned Primary Reviewer

The **Name** field displays the recipient's name.
### Viewing the List of Recipients

1. If there are more than four recipients listed, press [F8] to page forward and [F7] to page backward.

### Adding a Recipient

1. If there are more than four recipients listed, press [F8] to page forward to the end of the list. The cursor will be positioned on the command field (C) for the next available line.

2. Press [TAB] and type the recipient's userid on the first line and the user’s email address will automatically be populated from the directory. You may also enter just an e-mail address of a recipient on the second line (no userid will be populated). If you do not know the recipient's userid, you may look it up by using the Directory screen.

### Using the Directory to Look Up an ID or Address

1. Press [F6] to access the Directory Screen. To access the Directory directly from the function code menu, enter ‘IDIR’ at the command line. The Directory screen is displayed. (See Figure 6-2).
2. Type the name of the user at the **Search for: Name:** prompt. You must type the name in the following format:

   Last name, First Middle

![Figure 6-2. The PostAuth Notification Directory (IDIR) Screen](image)

The Directory screen will display the name you typed and the corresponding address for that user.

3. Press `[F3]` to return to the Notification Preparation Screen.

**Adding Comments**

1. At the Notification Preparation Screen, press `[F10]` to display the Comments Entry Screen. (See Figure 6-2a).

2. Type in the appropriate PAN comments.

3. You may also flag the PAN as urgent by changing the default **Priority** code from **R - Regular** to **U - Urgent**.

4. Press `[F10]` to return to the Notification Preparation Screen. Comments are mandatory.
Viewing the PAN

1. From the Notification Preparation Screen, press [F11] to display the first page of the PAN.

2. To scroll forward through each page of the PAN, press [F8]. To return to a previous page, press [F7].

   Notice that information that has been updated will generally be highlighted and preceded by one of the following symbols:

   **next to a field indicates that the field has been changed. (The old data is shown below the new data.)**

   `+` next to a field indicates that this is a new item.

   `-` next to a field indicates that this item has been deleted.

   The Status column on the last page of the PAN will display a ‘Y’ to indicate that a recipient has viewed the PAN.

3. After you finish viewing the PAN, enter [F11] to return to the Notification Preparation screen.

Sending the PAN/Updating the EDB

1. Press [F5] to send the current PAN to the recipients listed on the Notification Preparation screen.
When the PAN has been sent, the message U00007 "Update Process Complete" will be displayed.

⚠️ The PANs are sent to the recipients when the database is updated. To cancel your PANs you must cancel the update before you press [F5].

**Canceling the Update/PAN**

1. Press [F3] to return to the PPS Update Screen from which you initiated the update process.

2. Press [F2] twice to cancel the update and the PAN.
Reviewing Incoming PANs

You receive new PANs via the PAN inbox. You have a choice of reviewing PANs in the mainframe PPS application or using the PPS Web PAN application.

Viewing PANs in the mainframe PPS application

To view a summary list of incoming PANs that have not been read:

1. Enter 'INBX' at the Next Func: prompt field (on any screen) to see the PAN inbox.
2. At the Incoming Notifications Screen, tab to the PAN you want to view.
3. Type 'S' to select the PAN line which corresponds to the PAN you want to view (see Figure 6-4).

4. Press [Enter] to display the first page of the PAN.
5. To scroll forward through each page of the PAN, press [F8]. To return to a previous page, press [F7].

Notice that information that has been updated will generally be preceded by one of the following symbols:

UCINBX0-10925  PostAuth Notification  12/03/96 13:14:56
Incoming Notifications  Userid: SVCLDJ
Page: 01 of 06

<table>
<thead>
<tr>
<th>C</th>
<th>Tran</th>
<th>Prepared By</th>
<th>Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPER</td>
<td>Xuan, Theodore</td>
<td>02/10/95</td>
<td>NO</td>
<td>Jackie E Polinski</td>
</tr>
<tr>
<td>Summary: Personnel-Miscellaneous</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAPC PayOpt</td>
<td>02/10/95</td>
<td>NO</td>
<td>Lindsey S French</td>
<td></td>
</tr>
<tr>
<td>Summary: Appts./Distributions-Conden</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAPC Xuan, Theodore</td>
<td>01/30/95</td>
<td>NO</td>
<td>Manuel C Ibarra</td>
<td></td>
</tr>
<tr>
<td>Summary: Appts./Distributions-Conden</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAPC McDonald, Kim</td>
<td>01/25/95</td>
<td>NO</td>
<td>Juan P Smith</td>
<td></td>
</tr>
<tr>
<td>Summary: Appts./Distributions-Conden</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAPC Washington, Sam</td>
<td>01/25/95</td>
<td>NO</td>
<td>Dorothy L. Chandra</td>
<td></td>
</tr>
<tr>
<td>Summary: Appts./Distributions-Conden</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 6-4. Using the PAN inbox feature. Type 'S' on the notification line
* next to a field indicates that the field has been changed. (The old data is shown below the new data.)
+
- next to a field indicates that this item has been deleted.

The Status column on the last page of the PAN will display a ‘Y’ to indicate that a recipient has viewed the PAN.


After a PAN has been reviewed, an asterisk (*) will be displayed in the command field (C) that corresponds to the reviewed PAN on the Incoming Notifications screen.

**Viewing PANs in the PPS Web PAN application (preferred)**

The best way to review PANs is using the PPS Web PAN facility, which can be accessed from the portal page for **EmployeeLink** (http://employeelink.ucsd.edu):
1. From the EmployeeLink page click on the link titled **PPS Web Inquiry/PAN**. Another browser window will open with the login screen for the Web PPS. You may also directly type **https://a4.ucsd.edu/pp6webqa/auth** into the browser address field.

2. Login using your ACT Single Sign-On userid (not email) and password.

   ![Warning](image)

   **ACT Single Sign-On is not persistent with the Web PAN application, even though you use your single sign-on userid and password to login.**

4. From the Web PAN Main Menu, choose the link for **Inbox** to proceed to the PAN inbox.
For each incoming PAN, the inbox screen lists the following summary information:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Check the appropriate checkbox to delete a specific Pan, and click the DELETE button. (Note: mandatory recipients cannot delete a PAN unless it has been reviewed)</td>
</tr>
<tr>
<td>Status</td>
<td>Flag indicating unread (U) and urgent (!) PANs. The U will disappear after a PAN has been reviewed.</td>
</tr>
<tr>
<td>Type</td>
<td>Reviewer type (M-Mandatory, U-User Defined, F-Forwarded, R-Non-Mandatory, P-Primary).</td>
</tr>
<tr>
<td>Employee</td>
<td>Employee Name and primary title description. Click on the employee name link to open the PAN.</td>
</tr>
<tr>
<td>Action(s)</td>
<td>Action code description.</td>
</tr>
</tbody>
</table>
5. To view an employee PAN click on the employee’s name, which is a hyperlink.

See the sample employee PAN screen below:

The PAN is detailed by four categories:

A. Comments

B. General Information
C. Appointments and Distributions

D. List of Reviewers

6. You can scroll through the detail of the entire PAN or click on the appropriate category link in the header to directly go to that section of the PAN detail.

7. The List of Reviewers will display the status of the PAN (read/unread)

8. Additional comments can be added to the PAN by any reviewer by typing in the added comments box and clicking SAVE.

9. The PAN can be forwarded to another recipient by entering a valid UCSD userid or email address in the forwarding box and clicking SEND. Click on the Directory icon to find a specific user.

Deleting PANs
Once you have reviewed or forwarded your PANs, you can delete them from your inbox by performing the following steps:

Web PAN
1. Login to the Web PAN facility and select Inbox from the Main Menu.

2. From the Web PAN inbox, check the appropriate box of the PAN(s) you wish to delete and then click the DELETE button.

PPS Mainframe Application
1. Access the Incoming Notifications screen by entering 'INBX' in the Next Func: field.

2. On the Incoming Notifications screen, tab to the PAN you want to delete.

3. Type 'D' and press [ENTER] to delete the PAN from the list.

   After the PAN has been deleted, the message “DELETED” will appear.

4. To return to the function code menu, press [F3]

Mandatory recipients cannot delete a PAN unless it has been reviewed and is displayed as read in the inbox.
Web PAN Notification Selection

The Web PAN facility also allows PAN recipients to search or sort PANs in the inbox based on specific criteria:

A. Date and Time
B. Employee Department
C. Action Type or Code(s)
D. Employee ID
E. Preparer ID
F. Reviewer ID

The Notification Selection can only search for PANs that are currently contained in the reviewer’s inbox. The PAN inbox will be purged periodically, and will remove any PANs older than 60 days. EmployeeLink will retain historical PAN data indefinitely.
Hands-on Activity 6.1

In this activity, you will perform an action that changes an employee’s pay schedule from monthly to biweekly. You will then add recipients and comments to the PAN and review the detail screens before updating the database.

1. Access the **EAPC** screen for employee **B2**. (Look on your Class List to find out the employee id for the activity.)

   *First, you will end the current appointment and distribution.*

2. Move the cursor to the **ApptEnd** date for appointment 10.

3. Change the end date from 043007 to the last day of the current month (mmddyy format).

4. Move the cursor to the duration field and type an *.

   *This will remove existing data from the DUR field.*

5. Move the cursor to the **PayEnd** date for distribution 11.

6. Change the end date from 043007 to the last day of the current month (mmddyy format)

   *Next, you will copy the existing appointment to a new appointment.*

7. Press **[F9]** to move the cursor down to the Command Line (====>).

8. Type: **copy 10 to 20** and press [ENTER].

   *Appointment 10 is copied and the copy is renumbered 20.*

9. Change the following fields on appointment 20:

   - **Begin date:** *First day of the next month* (mmddyy format)
   - **End date:** **043007**
   - **Duration:** V
   - **Annual/Hourly rate:** **12.76** (2219.48 / 174)
   - **Rate type:** H
   - **Payment schedule:** BW

   *Next, you will copy the existing distribution to a new distribution.*

10. Press **[F9]** to move cursor down to the Command Line (====>).
11. Type: **copy 11 to 21** and press `[ENTER]`.

   *Distribution 11 is copied and the copy is renumbered 21.*

12. Change the following details on distribution 21:

   Begin date: **First day of the next month** (mmddyy format)

   End date: **043007**

   Rate/Amount: **Same as hourly amount for appointment**


   *The PAN Preparation screen will appear.*

14. **[TAB]** down to the userid column below the last userid.

15. Add the userid of the person sitting next to you and press `[ENTER]`.

   *If you don't know a userid, you can use the directory to find the userids of all employees who have been set up to receive PANs.*


   *Next, you will select a recipient from the directory.*

17. Press `[Home]` to position the cursor into the C column.

18. Press `[\]` and position the cursor next to a userid of your choice, that is not already in the recipient list.

19. Type **S** and press `[ENTER]`.

20. Press `[F3]` to return to Notification Preparation Screen

   *Notice that the id was automatically added to the list.*

   *Now, you will enter comments to assist the reviewers who will be reviewing this PAN.*


   *For certain actions, Central Offices require that specific comments be added to the PAN before updating.*

22. Type the following text: **Per department approval, changing the employee’s pay schedule from monthly to biweekly, effective mm/dd/yy.**

   *Now, you will review the content of the PAN to ensure that there are no errors.*

24. Use [F8] to page forward and review the detail screens. Notice the * and + signs in front of the appointments and distributions that have been changed and added.

25. When you have finished checking for errors, press [F5] to update the EDB and send the PANs to the mandatory reviewers and additional recipients.

**Hands-on Activity 6.2**

*In this activity, you will review the PANs in your inbox.*

**PPS Web PAN**

1. Go to your web browser (Internet Explorer) and type the following into the address box:

   https://a4.ucsd.edu/pp6webqa/auth

   (Note: this web address is for Web PAN training only)

2. Login using your training userid and password from your class work sheet.

3. From the Web PAN Main Menu, select and click **Inbox**.

4. Select and review a PAN in your inbox by clicking on the employee name.

5. Add an additional comment to the PAN.

6. Return to the inbox. Try deleting a PAN if you wish.

7. Next, click on the Main Menu link at the top of the page.

8. At the Main Menu click and go to the Notification Selection screen.

9. Try searching for a PAN.

10. Return to the Main Menu and click logout.

**Additional Practice Using the PPS Inbox**

1. From the Online Applications Main Menu, type **PSRV** in the Next Func: field to access the PAN Services Menu.

2. Use **INBX** to view incoming PANs.

3. Select and review a PAN in your inbox.
4. Return to the inbox by pressing [F3].

5. Return to the Online Applications Main Menu.