9.0   INQUIRY TRANSACTIONS

Table of Contents

DESCRIPTION

TRANSACTION

9.0   INQUIRY TRANSACTIONS

9.1   APPOINTMENT INQUIRIES

9.1.1 Appointment by Person Inquiry

This screen displays Appointments for a specific person, Appointment Ids, Employment verification and Appointment update functions.

Enter APPR (space) SSN

```
                                                              PAGE
 NAME            1                        ID        2
     SENIORITY

                                  MAJOR    CONTINUITY
  APPT ID   APPT%   TYPE  BASIS RATE    DEPT      STATUS  BEGIN       END

     3




                           4
 NEXT: _____        TP EXIT _____
            ****   PLEASE ENTER A PERSON SSN OR ID NUMBER  ****
 1=HELP        3=SORT 4=APPI 5=APRH 6=APDT       5        9=-1  10=+1  11=EXIT
```

ITEM	TITLE	DESCRIPTION
1	**NAME**	Employee's name will be displayed.
2	**ID**	Employee's person ID number will be displayed.
3		See Appointment Section of manual for description of fields displayed.
4	**NEXT/TP EXIT**	Enter the information required by the transaction in the NEXT field and the transaction you want to access in TP EXIT field (if PF key does not apply).
5	**FUNCTION KEYS**	Press pf 3 (SORT) to sort appointments in chronological order. Press pf 4 (APPI) to view Appointment detail as of a particular date. Press pf 5 (APRH) to view Rate and Title History. Press pf 6 (APDT) to view Appointment department info. Press pf 9 to view prior page. Press pf 10 to view next page. Press pf 11 (EXIT) to end transaction.

9.0   INQUIRY TRANSACTIONS

9.1   APPOINTMENT INQUIRIES (cont.)

9.1.2 Appointment Department Inquiry

This screen displays how the appointment is shared, what department affiliation exists, Department FTE percents, and whether LOA is active.

Enter APDT (space) Appointment ID

```
BROWN, JOCELYN J                    PERS ID 00057610            APDT PAGE  1
 APPT ID 00054764              SENIORITY:  06 30 1988      1   AS OF 10 17 1992
 TYPE CP (CLASSIFIED PERM)  16142 (PROGRAM ASST 2 CONF)
 APPT BEGIN 06 30 1988   END 10 17 1992        BASIS H          SEASONAL
     PROBATION TYPE                      BEGIN           END
 MAJ DEPT A510203      TOT APPT %  80.0000  TOT LOA %   0.0000  NET %  80.0000

 _ DEPARTMENT A510203    (HS-HSP/ADMINISTRATION)  FROM 06 28 1992 - 10 17 1992
   BEGIN        END         SESSION TYPE   PERCENT    HRS     LOA TYPE/CHANGE RSN
2  06 28 1992  10 17 1992           DEPT%  80.0000   64.00
                          3         4         5          6



 NEXT _____7_____   TP EXIT _____
                                         8
 1=HELP    3=APPR 4=APPI 5=APRH 6=DEPT 7=APCT       9=-1   10=+1   11=EXIT
```

ITEM	TITLE	DESCRIPTION
1	AS OF DATE	Today's date will be displayed unless you request a particular date. To request a particular date upon entry, enter as of date after Appointment ID/ as mmddyy.
2	DEPARTMENT BEGIN/END	Displays the begin and end date of percent or leave interval.
3	SESSION	Displays academic session for C Basis appointments.
4	TYPE	Displays the type of interval. DEPT % = Appt Dept % LOA % = Department Leave %
5	PERCENT/HRS	Displays the percent of full time for appointment FTE or leave of absence and hours if classified appointment.
6	LOA TYPE CHANGE RSN	Displays LOA if Type is LOA% or Displays change reason if Type is DEPT%.
7	NEXT/TP EXIT	Enter the information required by the transaction in the NEXT field and the transaction you want to access in TP EXIT field (if PF key does not apply).
8	FUNCTION KEYS	Press pf 3 (APPR) to view all appointments for a person. Press pf 4 (APPI) for Appointment Inquiry. Press pf 5 (APRH) to view Rate and Title History. Press pf 6 (DEPT) for Appointment Department Update. Press pf 9 to view prior page. Press pf 10 to view next page. Press pf 11 (EXIT) to end transaction.

9.0   INQUIRY TRANSACTIONS

9.1   APPOINTMENT INQUIRIES (cont.)

9.1.3 Appointment Inquiry

This screen displays information for one selected appointment as of a requested date.

Enter APPI (space) Appointment ID

```
AS OF        1                                                APPI PAGE 1
APPT ID                        PERS ID              SENIORITY:

APPT BEGIN DATE               -                     PRIOR LOC   TYPE    BRK
APPT END DATE                 -       2               NEXT LOC
      WORK AUTHORIZATION END                        LENGTH MONITOR

APPT TYPE:                          TITLE:
BASIS     RATE                                         CPP%

CONTINUITY                              SEASONAL
FLSA

MAJOR DEPT                                     TOTAL APPT %
                                              TOTAL LEAVE %

CONTRACT    BEGIN            END
BACKUP FOR APPT

NEXT _____4_____   TP EXIT _____
                                      5                          3
 1=HELP 2=APCT 3=APPR 4=APRH 5=APDT 6=CHGA 7=CHGR 8=DEPT 9=-1  10=+1   11=EXIT
```

```
AS OF                                                        APPI PAGE 2
APPT ID                        PERS ID              SENIORITY:
APPT TYPE:                          TITLE:
                                2

            EFF DATE                        EFF DATE
CONTINUITY

SEASONAL STATUS
SERVICE STATUS
FUNCTION
EXT AFFILIATION
EXEC PLAN
GUARANTEED LENGTH

STUDENT PAY CATEGORY                    FIN AID
FED/ST APPT        CONTINUING STAFF       RECRUITMENT
COMMENT
AWARD                                              DATE

NEXT _____4_____   TP EXIT _____
                                      5
 1=HELP 2=APCT 3=APPR 4=APRH 5=APDT 6=CHGA 7=CHGR 8=DEPT 9=-1  10=+1   11=EXIT
```

9.0   INQUIRY TRANSACTIONS

9.1   APPOINTMENT INQUIRIES (cont.)

9.1.3 Appointment Inquiry (cont.)

ITEM	TITLE	DESCRIPTION
1	**AS OF DATE**	Today's date will be displayed unless you request a particular date. To request a particular date upon entry, enter as of date after Appointment ID/ as mmddyy.
2		See Appointment Section of manual for description of fields displayed.
3	**PF 10/PAGE 2**	Press pf 10 to view page 2 with additional fields displayed.
4	**NEXT/TP EXIT**	Enter the information required by the transaction in the NEXT field and the transaction you want to access in TP EXIT field (if PF key does not apply).
5	**FUNCTION KEYS**	Press pf 2 (APCT) to view appointment percent Press pf 3 (APPR) to view all appointments for a person. Press pf 4 (APRH) to view Rate and Title History. Press pf 5 (APDT) to view appointment department info. Press pf 6 (CHGA) to update Appointment. Press pf 7 (CHGR) to change Rate and Title. Press pf 8 (DEPT) to update Department. Press pf 9 to view prior page. Press pf 10 to view next page. Press pf 11 (EXIT) to end transaction.

9.0   INQUIRY TRANSACTIONS

9.1   APPOINTMENT INQUIRIES (cont.)

9.1.4 Appointment Percent History Inquiry

This screen displays the total appointment percent levels for a requested period of time.

Enter APCT (space) Appointment ID

```
                              PERSON ID                    APCT PAGE  1
 APPT ID                      SENIORITY:
   TYPE                 1        APPT BEGIN              APPT END
   MAJ DEPT             2     REQUESTED DATES              THRU

  INTERVAL  BEGIN     END            NET %      APPT %        LOA %
              3                        4          5            6




 NEXT _____7_____    TP EXIT _____
 ENTER NEXT REQUEST IN "NEXT" FIELD
 1=HELP      3=APPR 4=APPI 5=APRH 6=APDT     8      9=-1   10=+1   11=EXIT
```

ITEM	TITLE	DESCRIPTION
1	**APPT BEGIN APPT END**	Displays the Appointment Begin and End Dates for Appointment ID requested.
2	**REQUESTED DATES**	Current fiscal year will be displayed unless you request a particular time period. To request a particular time period upon entry, enter begin and end dates after Appointment ID/ as mmddyy/mmddyy.
3	**INTERVAL BEGIN/END**	Displays the starting and ending dates of an interval of time when Appt Percent and Leave Percent are constant.
4	**NET %**	Displays the difference between Appt Percent and Leave Percent in the interval of time.
5	**APPT %**	Displays the total Appt Percent in the interval of time.
6	**LOA %**	Displays the total Appt Leave Percent in the interval.
7	**NEXT/TP EXIT**	Enter the information required by the transaction in the NEXT field and the transaction you want to access in TP EXIT field (if PF key does not apply).
8	**FUNCTION KEYS**	Press pf 3 (APPR) to view all appointments for a person. Press pf 4 (APPI) for Appointment Inquiry. Press pf 5 (APRH) to view Rate and Title History. Press pf 6 (APDT) for Appointment Department Inquiry. Press pf 9 to view prior page. Press pf 10 to view next page. Press pf 11 (EXIT) to end transaction.

9.0   INQUIRY TRANSACTIONS

9.1   APPOINTMENT INQUIRIES (cont.)

9.1.5 Appointment Rate and Title History Inquiry

This screen displays all changes in rate and title history from the "as of date" back to the earliest rate and title for the selected appointment.

Enter APRH (space) Appointment ID

```
                             AS OF      2              APRH  PAGE  1 OF  1
  APPT ID     1                 PERS ID               SENIORITY:

   EFF DATE   BASIS RATE    TITLE AND CHANGE REASON      RATE CHANGE REASON
         3




  NEXT _____4_____        TP EXIT _____

  1=HELP      3=APPR 4=APPI 5=APCHGR 6=APDT    5           9=-1   10=+1   11=EXIT
```

ITEM	TITLE	DESCRIPTION
1	APPT ID/ PERSON ID	Displays the Appointment ID and Person ID of employee requested.
2	AS OF	Displays the AS OF date requested. If no date requested, will display as of the current date.
3		See Appointment Section of manual for description of fields displayed.
4	NEXT/TP EXIT	Enter the information required by the transaction in the NEXT field and the transaction you want to access in TP EXIT field (if PF key does not apply).
5	FUNCTION KEYS	Press pf 3 (APPR) to view all appointments for employee. Press pf 4 (APPI) to view Appointment detail as of a particular date. Press pf 5 (APCHGR) to change Rate and Title. Press pf 6 (APDT) to view Appointment department info. Press pf 9 to view prior page. Press pf 10 to view next page. Press pf 11 (EXIT) to end transaction.

9.0   INQUIRY TRANSACTIONS

9.2   CALCULATION SCHEDULE INQUIRY

This screen allows you to review the contents of payroll calculation schedule records.

Enter CSCI (space)

```
CSCI                    CALCULATION SCHEDULE INQUIRY                    START

        SELECT ONE OF THE FOLLOWING WAYS TO DISPLAY THE CALCULATION SCHEDULE.
        FILL IN THE REQUESTED INFORMATION FOR YOUR SELECTION. IF NO SELECTION
        IS ENTERED, THE ENTIRE CALCULATION SCHEDULE WILL BE SHOWN.

                                    START        END
        1      PAID PERIOD         __ __        __ __         (MM YY)
               EARNED PERIOD       __ __        __ __         (MM YY)
               PROCESSED DATE      __ __ __     __ __ __      (MM DD YY)
               PAYABLE DATE        __ __ __     __ __ __      (MM DD YY)
               CALC NUMBER         _____      _____

        SELECT A SPECIFIC TYPE OF CALCULATION TO REVIEW:
        (IF NO SELECTION IS ENTERED, ALL TYPES WILL BE INCLUDED.)


            _  (R = REGULAR)     2    _   (C = CLASSIFIED)
               (S = SPECIAL)             (S = STUDENT)
                                         (U = UNCLASSIFIED)


    ENTER SELECTION CRITERIA

    ENTER   PF11=EXIT
```

ITEM	TITLE	DESCRIPTION
1	**METHOD TO SELECT RECORDS**	You may specify the method of displaying records by selecting a date (start and/or end) or a particular calc number.
2	**TYPE**	You may also specify a particular type of calculation, i.e. regular or special, and classified or unclassified. If no selection made, you will get all calculations for method selected in #1.
	ENTER	Press enter when selection is made or pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.2   CALCULATION SCHEDULE INQUIRY (cont.)

This screen shows a list of records according to the criteria you entered on the menu screen.

```
CSCI                    CALCULATION SCHEDULE INQUIRY                 SELECT
             1               2                3   4   5        6           7
          CALC ID   CALC DESCRIPTION      ST  TY  EARN     PAID       PROCESS
01    9511600   NOV A STUDENT            C   R   11/95    11/17/95    11/09/95
02    9511620   SPEC CLS PAYROLL         C   S   11/95    11/17/95    11/09/95
03    9511630   SPEC UNCLS PAYROLL       C   S   11/95    11/17/95    11/09/95
04    9511640   SPEC EXT UNCLS PAYROLL   C   S   11/95    11/17/95    11/09/95
05    9511700   NOV A CLASSIFIED         C   R   11/95    11/22/95    11/16/95
06    9511720   SPEC UNCLS PAYROLL       C   S   11/95    11/22/95    11/16/95
07    9511730   SPEC STUDENT PAYROLL     C   S   11/95    11/22/95    11/16/95
08    9511740   SPEC CLS PAYROLL         C   S   11/95    11/22/95    11/16/95
09    9511750   SPEC WSEU TERM PAY       C   S   11/95    11/22/95    11/16/95
10    9511760   SPEC DEATH CLAIM         C   S   11/95    11/22/95    11/16/95
11    9511770   SPEC DEATH CLAIM CLS     C   S   11/95    11/22/95    11/16/95
12    9512010   NOV B STUDENT            C   R   11/95    12/01/95    11/22/95
13    9512020   SPEC CLS SETTLEMENT      C   S   11/95    12/01/95    11/22/95
14    9512030   SPEC UNCLS P/R           C   S   11/95    12/01/95    11/22/95


8__   ENTER LINE NUMBER FOR INDIVIDUAL CALC DETAIL                  PAGE 1
                                      9
 ENTER   PF1=NEXT   PF2=PREV   PF7=START   PF11=EXIT
```

ITEM	TITLE	DESCRIPTION
1	CALC ID	Identifies the calculation number assigned to a particular calculation.
2	CALC DESCRIPTION	Identifies the name of the particular calculation.
3	ST (status)	Gives you status of a particular calculation. A = scheduled C = calculated
4	TY (type)	Identifies the calc type as either R for regular or S for special (i.e. death claim payroll).
5	EARN`	Identifies the earned period (month/year) of the calculation.
6	PAID	Identifies the pay date for the calculation.
7	PROCESS	Identifies the date of the calculation.
8	ENTER LINE NUMBER FOR INDIVIDUAL CALC DETAIL	You may specify the line number to view the detail of a particular calculation schedule record (display screen).
	ENTER	Press enter when selection is made to go to the Display screen.
9	FUNCTION KEYS	Pf 7 (start) will take you back to the Menu screen. Pf 11 to exit this transaction.

9.0   INQUIRY TRANSACTIONS

9.2   CALCULATION SCHEDULE INQUIRY (cont.)

This screen displays detailed information about one particular calculation record.

```
CSCI                      CALCULATION SCHEDULE INQUIRY              DISPLAY

 CALC NUMBER 199511700 - NOV A CLASSIFIED

        STATUS . . . . . . C - CALCULATED
        EARNED PERIOD  . . 11/95
        PAY DATE . . . . . 11/22/95
        PROCESS DATE . . . 11/16/95
        PAYROLL GROUP  . . C - CLASSIFIED
        CALC TYPE  . . . . R - REGULAR
   1    RETRO PAYROLL  . . N - NO
   2    WITHHOLD METHOD  . R - REGULAR
   3    DED METHOD . . . . R - REGULAR
   4    DED PERIOD . . . . 11/95
   5    VOUCHER NUMBER . . 00696
   6    FISCAL YEAR  . . . 1996
   7    PAY PERIOD . . . . A - BIWEEKLY  BEGIN 10/29/95  END 11/11/95
   8    MESSAGE  . . . . . H - HOME ADDRESS WILL BE PRINTED
   9    CHECK NUMBERS  . . NO CHECKS PRINTED
  10    DISBURSEMENT OPT . 3 - ACH/CHECKS TO FEEDER
  11    NEXT CALC NUMBER . _____

                              12
 ENTER   PF1=NEXT  PF7=START  PF8=SELECT  PF11=EXIT
```

9.0   INQUIRY TRANSACTIONS

9.2   CALCULATION SCHEDULE INQUIRY (cont.)

This screen displays detailed information about one particular calculation record.

ITEM	TITLE	DESCRIPTION
1	RETRO PAYROLL	Identifies if this is a retro payroll calculation.
2	WITHHOLD METHOD	Identifies the withholding method of this calculation. R = Regular tax rates, combine this gross with any other gross to be paid in same pay period S = Special tax rates, do not combine this gross with any other payrolls. Compute at lesser of married with no allowances or 20%.
3	DED METHOD	Identifies the method of taking deductions. R = use regular deduction method. S = use supplemental deduction method and take only mandatory deductions.(S.S., WRS and taxes)
4	DED PERIOD	Identifies the Deduction period as month year. Same as Earned period.
5	VOUCHER	Identifies the voucher number of the calculation.
6	FISCAL YEAR	Identifies the fiscal year the calculation is charged to.
7	PAY PERIOD	Identifies the pay period and the begin and end dates of the calculation.
8	MESSAGE	Identifies the message is printed on earnings statement. H = Home address for W2 L = Calendar year leave accounting information X = Externally specified U = Unspecified
9	CHECK NUMBERS	Previously indicated the check numbers which this calculation created. Since 4/96 indicates No Checks Printed.
10	DISBURSEMENT OPTION	Option 3 indicates disbursements are through ACH/feeder system. Option 2 indicates disbursements (i.e. special awards) are through checks to feeder system.
11	NEXT CALC NUMBER	To display a specific calc record, key in its Calc Number and press enter.
12	FUNCTION KEYS	Pf 1 (next) will display the next calculation record. Pf 7 (start) will take you back to the Menu screen. Pf 8 (select) will return you to the Selection screen. Pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.3   CLASSIFIED LEAVE INQUIRY

This screen shows year to date leave balances for a permanent or project classified employee.

Enter PLAI (space) SSN

```
PAGE 01
  388 88 8888    BLUTARSKY, SENATOR         SENIORITY DATE:          BU: 11

  BIWEEKLY LEAVE ENTRY          TYPE AND NUMBER OF HOURS
 1      -- -----  -- -----  -- -----  -- -----  -- -----  -- -----


 2     YEAR TO DATE SUMMARY        (INCLUDES ANY HOURS LISTED ABOVE)
            VACATION    SICK LV   PER HOL   LEG HOL   COMP TIME    SABB LV
   BEGIN BAL     0.0       20.0       .0
   ALLOCATED    80.0                 24.0
      EARNED               8.0
        USED
         ADJ
    CURR BAL    80.0       28.0     24.0

LV STATUS: A MOD R  DEPT: 21 - A54    SUPR:       NON-DEDUCT LWOP MAX
VACATION CARRYOVER:       PAY PERIOD HOURS: 80.0   LWOP DD       ND
PER HOL CARRYOVER:        CONTRACTED SABB:          MILITARY LV YTD
LEGAL HOLIDAY ENTRY:

                                         3  NEXT     FIRST    LAST
                                            SIGNON   SIGNOFF  AVAL
                                            =-1      =1       =+0
                                            /RELEASE /EXIT    ...
```

ITEM	TITLE	DESCRIPTION
1	**BIWEEKLY LEAVE ACTIVITY**	Shows the leave accounting activity entered for employee before the payroll calculation.
2	**YEAR TO DATE SUMMARY**	Displays the year-to-date summary fields for the employee. Year-to-date totals and current balances are automatically updated when leave activity is entered.
3	**FUNCTION KEYS**	Press pf 1 to go to first leave activity history screen. Pressing pf 3 will take you to the last page which will show you the most recent leave activity. Pressing pf 2 will then take you back to the balance screen. Pf 11 to exit the transaction

9.0   INQUIRY TRANSACTIONS

9.3   CLASSIFIED LEAVE INQUIRY (cont.)

Classified Leave History Screen

This screen shows the history of leave activity for a classified employee over an 18 month period.

```
388 88 8888    BLUTARSKY, SENATOR                              PAGE 02
        1          2                            3
  PERIOD     VACATION   SICK LEAVE   PER H  LEGAL HOL     COMP TIME      SABBATICAL
  ENDING     EARN USED  EARN USED    USED   EARN USED   EARNED    USED   ADDED USED

 02/22/92  6.1          4.0




                                                            4
                                                 NEXT      FIRST     LAST
                                                 SIGNON    SIGNOFF   AVAL
                                                 =-1       =1        =+0
                                                 /RELEASE  /EXIT     ...
```

ITEM	TITLE	DESCRIPTION
1	PERIOD ENDING	Identifies the end date of the biweekly pay period. History begins with the last 3 months of the previous year and continues through the last biweekly period that has been payrolled. Old history is not purged until after April deferred enrollment for ICI.
2	VACATION EARN	Identifies vacation earned for the period. This amount is used only to determine final vacation balance for terminating employees.
3	LEGAL HOLIDAY EARN/USED	Identifies legal holiday earned and used in a pay period.
4	FUNCTION KEYS	Press pf 1 to go to next leave activity history screen. Pf 3 will take you to the last page which will show you the most recent leave activity. Pf 2 will take you back to the balance screen. Pf 11 to exit the transaction

9.0   INQUIRY TRANSACTIONS

9.3   9.3   CLASSIFIED LEAVE INQUIRY (cont.)

Classified Leave Forecast Screen

This screen is used to determine the remaining vacation balance when an employee is terminating employment. The termination date used for forecasting must be either the current or future date.

Enter PLAI (space) SSN/termination date

Next press PA1 to access the Forecast screen.

```
                                                     PAGE 02
                      FINAL VACATION BALANCE CALCULATION (*)
           FOR DOE, JANE                    333 33 3333    BU: 07
  1          AS OF: 12 31 99                    SENIORITY DATE: 11 10 75


                         11 07 99 - 12 31 99
        NORMAL PAY HOURS           80.0
        SCHEDULED HOURS             320
        VACATION FACTOR         0.084291


  2  -------------------- FINAL VACATION BALANCE -----------------------
                          BEGIN BAL       43.8
                        + EARNED         175.9
                        - USED           137.0
                        - LOST
                        = FINAL BAL       82.7
     -------------------------------------------------------------------
 3  PER HOL BAL      LEG HOL BAL        COMP BAL        SABB BAL   325.0
                                          4    NEXT      FIRST     LAST
    * NOTE: ABOVE CALCULATION ASSUMES NO        SIGNON    SIGNOFF  AVAL
      VACATION USED OR LOST, OR LEAVE WITHOUT   =-1       =1       =+0
      PAY BETWEEN NOW AND TERMINATION DATE.     /RELEASE  /EXIT    ...
```

ITEM	TITLE	DESCRIPTION
1	**AS OF**	Displays the termination date selected. It must fall within the current or future pay period. If the notification of termination is delayed (prior pay period), use the first day of the current pay period (a Sunday) as the term date.
2	**FINAL VACATION BALANCE**	If the final vacation balance is negative, you must reduce the pay status hours for the last pay period. If the final vacation balance is greater than zero, you must add a vacation termination payment (pay type TV) on the last payroll.
3	**OTHER LEAVE BALANCES**	Remaining personal holiday, legal holiday, compensatory time and sabbatical leave balances must also be paid on the last payroll for the employee
4	**FUNCTION KEYS**	Press pf 1 to go to first leave activity history screen. Pf 2 will take you back to the balance screen Pf 3 will take you to the last page which will show you the most recent leave activity. Pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.4   DEDUCTION INQUIRIES

9.4.1 Deduction Inquiry

This screen displays the deductions for an employee and what the status is of that deduction at the current time. All inactive deductions are deleted at the end of the calendar year.

Enter IDED (space) SSN

```
388 88 8888     BLUTARSKY, SENATOR                          PAGE 01 OF 01
     1              2               3       4   5   6     7          8
  CODE      DEDUCTION   NAME        YTD-TOT MO-DED SEC MONTH STATUS NO PYMT
                                                                  REMAINING
  051   LINCOLN NATL LIFE-TSA       100.00   50.00  01 JAN    I
  301   ERA MEDICAL                 375.00   15.00  01 NOV    A        01
  4DB   GHC-SO CENTRAL WISC                   1.00  01 NOV    A
  414   STATE GROUP LIFE INS        204.49   17.00  01 NOV    A
  455   INCOME CONTINUE INS                   1.15  01 NOV    A
  525   PARKING - MADISON            81.66   27.22  01 NOV    A        06
  754   ST CAPITOL EMP CR UN       3354.31  139.20  01 NOV    A



                                      ...          ...
                                   SIGNON      SIGNOFF    AVAL
                                     =-1          =1        =+0
                                   /RELEASE   /EXIT    9   ...
```

ITEM	TITLE	DESCRIPTION
1	CODE	Identifies the code of this Deduction.
2	DEDUCTION NAME	Identifies the name of the Deduction.
3	YTD-TOT	Displays the YTD total of the deduction. This field is blank if the deduction has no employee contribution.
4	MO-DED	Identifies the amount of the monthly deduction.
5	SEC	Identifies the Section the employee was paid in when this deduction was taken. If the deduction did not take, there is a "code" shown in this field See the next page for these codes and their meanings.
6	MONTH	Identifies the last month this deduction was taken.
7	STATUS	Identifies the status of the deduction. A = Active I = Inactive P = Pending
8	NO PYMT REMAINING	Identifies the number of payments remaining for this deduction. Used for early coverage health insurance, ERA, parking.
9	FUNCTION KEYS	Pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.4   DEDUCTION INQUIRIES (cont.)
9.4.1 Deduction Inquiry (cont.)
Inquiry Transaction

If a deduction does not take, there could be a code in the "SEC" column. The codes and their meanings are below.

Code	Meaning
**	Insufficient net income
*1	Previous entry with same deduction code was ineligible
%2	No eligible appointment type
%3	No eligible bargaining unit
%4	Invalid deduction amount
%6	Teaching Assistant (TA) or Program Assistant (PA) appointment will be paid later in month
%7	TAA/GAA monthly dues cap reached
%A	No eligible gross pay for computing deduction
%C	Not taken as result of Payroll History Change
%H	No eligible hours for computing deduction
%R	No payment covered by retirement
%%	No eligible gross, deduction 431
NN	Insufficient eligible gross to first quality for Deduction 431
NR	All payments subject to retirement
%W	Insufficient W-2 gross for TSA's
ZZ	Basic State Group Life not taken or missing (pre-requisite deduction)
WW	Waiver prevents State Group Life deduction

```
XXX XX XXXX      SMITH, SUSSIE R      111111                 PAGE 01 OF 01
   DEDUCTION   NAME               YTD-TOT  MO-DED  SEC MONTH STATUS NO PYMT
                                                                    REMAINING
 412    STATE GROUP LIFE                                       P
 452    INCOME CONTINUATION                                    P
 666    WI SCI PROFESSIONAL          49.20    16.40  02 MAY    I




                                          ...      ...   ...
                                         SIGNON   SIGNOFF AVAL
 * INDICATES THAT DEDUCTION IS            =-1       =1        =+0
   PROCESSED UNDER THE UWBA SYSTEM       /RELEASE  /EXIT      ...
```

9.0   INQUIRY TRANSACTIONS

9.4   DEDUCTION INQUIRIES (cont.)

9.4.2 Deduction Control Inquiry

This screen allows you to review details about a particular deduction code.

Enter DCIN (space)

```
DCIN                 EXTENDED PAYROLL DEDUCTION CONTROL INQUIRY           START



       USE ONE OF THE FOLLOWING METHODS TO SELECT THE DEDUCTION CODES YOU
       WISH TO REVIEW.

              1)   FOR A RANGE OF DEDUCTION CODES, FILL IN BOTH THE START
                   AND END DEDUCTION CODES.

              2)   FOR A SINGLE DEDUCTION CODE, FILL IN THE START DEDUCTION
                   CODE ONLY.

                        START DEDUCTION CODE ___
                          END DEDUCTION CODE ___

 ENTER SELECTION CRITERIA

 ENTER   PF11=EXIT
```

Fast Path is DCIN (space) Deduction Code

```
DCIN                 EXTENDED PAYROLL DEDUCTION CONTROL INQUIRY          DISPLAY
DEDUCTION 4AO, STANDARD

1 TAKE CODE  . .Z              11 STATUS  . . . A        ORDER  . . . . 070
2 CAMPUS . . . .Y - SYSTEM WIDE 12 GROUP  . . . 020    DEF ACCOUNT  . 3006
3 DOA PLAN CODE 01             13 DEFERRED . Y - YES   RETR REQUIRED Y - YES
4 REPORT CODE  .AA             14 PYMT REQUIRED N - NO   PERCENT  . . N - NO
                               15 TAX DEDUCTIBLE Y - YES
5 UWBA DEDN TYPE HLTH          16 FAIR SHARE . . N - NO
6 CONVERSION IND N             17 SUMMER SWITCH  Y - YES
                                  CHECK NAME . . NO
                                  E/S NAME . . . STANDARD HLTH
7 BU . . . . . .
8 BU CAMPUS  . .
9 FAIR BU  . . .
  FAIR BU TITLE
10 VALID CLASSES  21,22,24,26,27,11,19

  NEXT DEDUCTION ___

ENTER  PF1=NEXT  PF7=START  PF8=SELECT  PF9=LISTING  PF11=EXIT
```

9.0   INQUIRY TRANSACTIONS

9.4.2 Deduction Control Inquiry (cont.)
This screen allows you to review details about a particular deduction code.

ITEM	TITLE	DESCRIPTION
1	TAKE CODE	Refer to Payroll Deduction Listing for definition.
2	CAMPUS	Identifies which campus can access deduction.
3	DOA PLAN CODE	Identifies the plan code of health insurance carriers.
4	REPORT CODE	This field is not used.
5	UWBA DEDN TYPE	Identifies the Deduction Type in the UWBA system.
6	CONVERSION IND	Identifies if the Deduction has been converted to the UWBA system. (Y = Yes, N = No)
7	BU	Bargaining Unit
8	BU CAMPUS	Bargaining Unit Campus
9	FAIR BU / FAIR BU TITLE	These fields are not used.
10	VALID CLASSES	2 Digit class codes. Deductions only take from employees paid in these codes. If field is blank, it will take from all.
11	STATUS	A=Active I=Inactive
12	GROUP	Identifies a group of deductions. Used by UWPC to request a group of deductions, i.e. 20 for all health, 30 for all ICI
13	DEFERRED	Identifies if the deduction is put in a Deferred Account and check is not produced. Y = Yes N=No.
14	PYMT REQUIRED	Identifies if deduction entry requires a number of payments, i.e. Early Coverage Health, ERA. Y=Yes N=No.
15	TAX DEDUCTIBLE	Identifies if deduction is tax deductible. Y=Yes N=No
16	FAIR SHARE	Identifies if Union Dues deduction is fair share Y=Yes N=No
17	SUMMER SWITCH	"Yes" indicates this deduction can have 4 deductions taken in May for "C" basis employee. "No" indicates deduction is not able to have multiples taken automatically in May, i.e. TSA "Take" indicates that deduction takes in the summer.

9.0 INQUIRY TRANSACTIONS

9.4   DEDUCTION INQUIRIES (cont.)
9.4.2 Deduction Control Inquiry (cont.)

This screen allows you to review details about a particular deduction code.

Enter DCIN (space) Deduction Code

```
DCIN                EXTENDED PAYROLL DEDUCTION CONTROL INQUIRY          DISPLAY
DEDUCTION 4AO, STANDARD


TAKE CODE  . .Z             STATUS  . . . A    20 ORDER  . . . . 070
CAMPUS . . . .Y - SYSTEM WIDE  GROUP . . . 020  21 DEF ACCOUNT  . 3006
DOA PLAN CODE 01             DEFERRED . Y - YES  22 RETR REQUIRED Y - YES
REPORT CODE .AA             PYMT REQUIRED N - NO  23 PERCENT  . . N - NO
                           TAX DEDUCTIBLE Y - YES
UWBA DEDN TYPE HLTH        FAIR SHARE . . N - NO
CONVERSION IND N          SUMMER SWITCH  Y - YES
                      18 CHECK NAME . . NO
                      19 E/S NAME . . . STANDARD HLTH
BU . . . . . .
BU CAMPUS  . .
FAIR BU  . . .
FAIR BU TITLE
VALID CLASSES  21,22,24,26,27,11,19

24 NEXT DEDUCTION ___


                      25
ENTER  PF1=NEXT  PF7=START  PF8=SELECT  PF9=LISTING  PF11=EXIT
```

ITEM	TITLE	DESCRIPTION
18	CHECK NAME	Identifies Name as it appears on check. No indicates no check is produced.
19	E/S NAME	Name as it appears on earning statement.
20	ORDER	Identifies the order that deduction is taken.
21	DEF ACCOUNT	Identifies the Deferred Account Code if field "Deferred" is Yes.
22	RETR REQUIRED	Indicates if Retirement coverage is required in order for deduction to take. Y = Yes. N=No
23	PERCENT	Indicates if this deduction is produced as a percent. Y=Yes N=No
24	NEXT DEDUCTION	Enter the next deduction you wish to view.
25	FUNCTION KEYS	Pf 1 will take you to next deduction Pf 7 will take you back to the menu screen. Pf 8 will take you to a selection screen of deductions. Pf 9 will take you to a listing screen with valid ded amts PF 11 to exit the transaction.

9.0 INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY

This inquiry screen displays a historical file of classification titles and rates.

```
HTTTM0A                    HISTORICAL TITLE FILE                10/31/95
                                Main Menu                        12:37 PM


                   1         As-of date:  10-31-1995




          2    Type of Information:  _        ( T )itle, Minmax ( R )ates

          3    Title Type:          _         ( C )lassified, ( U )nclassified,
                                               or ( S )tudent

          4   Title Code:             _____

          5  Salary Schedule:          __



Enter-PF1---PF2--PF3- -PF4---PF5---PF6---PF7---PF8-- PF9- -PF10--PF11--PF12---
     HELP                                                      EXIT
```

ITEM	TITLE	DESCRIPTION
1	AS OF DATE	Enter the "As of" date you want to view the title. Defaults to today's date.
2	TYPE OF INFO	Enter T to view title. Enter R to view rates.
3	TITLE TYPE	Enter C for classified title, U for Unclassified title or S for student title.
4	TITLE CODE	Enter numeric Title Code. If no entry made, you will view all the titles for the appropriate type. You can then select a title to view.
5	SALARY SCHEDULE	This field is used only to view schedule and grid effective dates. Enter Salary Schedule of rates you wish to view.

View Classified Rates

```
HTTTM0A                  HISTORICAL TITLE FILE                   10/31/95
                              Main Menu                          12:37 PM


                    1     As-of date:  10-31-1995



        2     Type of Information:  R_        ( T )itle, Minmax ( R )ates

        3     Title Type:           C_        ( C )lassified, ( U )nclassified,
                                              or ( S )tudent
      +---------------------------------------------------------------------+
      |                                                       HTTTM30A  |
      | 4 Do you want to access the (M)inmax or (G)rid screen?  _           |
      |                                                                     |
      | 5 Please specify:     Schedule: __                                  |
      |                       Auth/Eff Flag: _ (blank, 'A', or 'D')         |
      |                                                                     |
      |    blank = data is in effect on the as-of-date                      |
      |    'A'   = data is in effect on the as-of-date, & it is authorized  |
      |    'D'   = data is in effect on the as-of-date, it is authorized,   |
      |            & the 'payroll-auth-date' is on or earlier than today's date |
      |                                                                     |
      | Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11-- |
      |      HELP  RET         6                                          - |
      +---------------------------------------------------------------------+
```

ITEM	TITLE	DESCRIPTION
1	AS OF DATE	Enter the "As of" date you want to view. Defaults to today's date.
2	TYPE OF INFO	Enter R to view rates.
3	TITLE TYPE	Enter C for classified title.
	ENTER	Upon entry you will get a screen asking if you would like to view Min/Max or Grid.
4	MIN/MAX OR GRID	Enter M to view Min/Max. Enter G to view Grid.
5	SCHEDULE	Enter schedule of rates or grid you wish to view.
6	FUNCTION KEYS	Pf 2 to return to prior screen.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)
View Classified Grid Data
This screen displays the Grid of a particular schedule upon requesting "G" on the Main Menu or pressing pf 3 on the MinMax screen.

```
HTTTM31                        HISTORICAL TITLE FILE                06/03/96
                                 View Grid Data                     03:36 PM
  As-of Date: 06-03-1996                   Title Code 00101 is in Range 09
  Schedule:  02   Sched Eff Date: 11-26-1995
  Sched Payroll Auth Date:         11-26-1995  Auth/Eff Flag:
  GRID CODE: 02   GRID EFF DATE: 11-26-1995  GRID END DATE: 07-06-1996
  Grid Type: SENIORITY BASED              Seniority Ref Date: 06-30-1995
  Grid Name: ADMINISTRATIVE SUPPORT

1 Starting Range: 06 ********************* R A N G E S ****************
     Identifier       06           07           08           09
     MINIMUM          7.833        8.449        9.118        9.862
     PSICM            8.068        8.703        9.392       10.158
     03               8.422        9.094        9.802       10.581
     04               8.516        9.200        9.915       10.698
     05               8.610        9.306       10.028       10.815
     06               8.704        9.412       10.141       10.932
     07               8.798        9.518       10.254       11.049
     08               8.892        9.624       10.367       11.166
     09               8.986        9.730       10.480       11.283
     10               9.080        9.836       10.593       11.400
     11               9.174        9.942       10.706       11.517

Enter-PF1---PF2---PF3---PF4---PF5-PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        HELP   RET   MMAX           2      PREV  NEXT  LEFT  RGHT  EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	**STARTING RANGE**	Change the starting range to move to the new range you wish to view.
2	**FUNCTION KEYS**	Pf 2 to return to prior screen. Pf 3 to go to the MinMax Screen. Pf 7 to move up on the Grid page. Pf 8 to move down on the Grid page. Pf 9 to move left on the Grid page. Pf 10 to move right on the Grid page. Pf 11 to exit the transaction. Pf 12 to go to the Main Menu.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)
View Classified Schedule Range MinMax

This screen displays the MinMax range of a particular schedule upon requesting "M" on the main menu or pressing pf 3 on the Grid screen.

```
HTTTM09                      HISTORICAL TITLE FILE              06/03/96
                           View Schedule-Range Minmax           03:25 PM
  As-of Date: 06-03-1996                  Title Code 00101 is in Range 09
  Schedule: 02 Sched Eff Date: 11-26-1995    Sched End Date: 07-06-1996
  Sched Payroll Auth Date:     11-26-1995    Auth/Eff Flag:
  Schedule Name: ADMINISTRATIVE SUPPORT
              Schd-Rng        Minimum        PSICM       Maximum        Step
              02 - 06          7.833         8.068       10.490     _____
 1    _       02 - 07          8.449         8.703       11.426     _____
      _       02 - 08          9.118         9.392       12.288     _____
      _       02 - 09          9.862        10.158       13.155     _____
      _       02 - 10         10.668        10.989       14.110     _____
      _       02 - 11         11.542        11.889       15.036     _____
      _       02 - 12         12.491        12.866       16.038     _____
      _       02 - 13         13.515        13.921       17.093     _____




 Enter-PF1---PF2---PF3---PF4---PF5--PF6--PF7---PF8---PF9---PF10--PF11--PF12---
        HELP  RET   GRID        2         PREV  NEXT             EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	LINE COMMAND	Position cursor before any schedule-range to view history, place any character on the line to mark it and press enter.
2	FUNCTION KEYS	Pf 2 to return to prior screen. Pf 3 to go to the Grid screen from the Min/Max screen. Pf 7 to move up on the MinMax page if applicable. Pf 8 to move down on the MinMax page if applicable. Pf 11 to exit the transaction. Pf 12 to go to the Main Menu.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)

View Classified Salary Schedule

This screen displays schedule and grid effective and end dates. It also identifies which grid is associated with a schedule.

Enter TITLE (space)

```
HTTTM0A                    HISTORICAL TITLE FILE              10/31/95
                               Main Menu                      12:37 PM


                   1          As-of date:  10-31-1995




          Type of Information:      __        ( T )itle, Minmax ( R )ates

            Title Type:             __        ( C )lassified, ( U )nclassified,
                                              or ( S )tudent

            Title Code:            _____

        2   Salary Schedule:        02



Enter-PF1---PF2--PF3- -PF4---PF5---PF6---PF7---PF8-- PF9- -PF10--PF11--PF12---
     HELP                                                          EXIT
```

ITEM	TITLE	DESCRIPTION
1	AS OF DATE	Enter the "As of" date you want to view. Defaults to today's date.
2	SALARY SCHEDULE	Enter Salary Schedule number that you wish to view.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)
View Classified Salary Schedule

```
HTTTM32                    HISTORICAL TITLE FILE              06/04/96
                             View Salary Schedule             02:51 PM
      As-of Date: 06-04-1996
      SCHEDULE: 01   Sched Eff Date: 04-14-1996    Sched End Date: 07-06-1996
                     Sched Payroll Authorization Date: 04-14-1996
      Schedule Name: GENERAL NONREPRESENTED_____

   **************** GRID(s) ASSOCIATED WITH THIS SCHEDULE ******************

      GRID CODE: 01_ Grid Eff Date: 04-14-1996    Grid End Date: 07-06-1996
                    Grid Type (P/S): P    Seniority Ref Date: _____
      Grid Name: GENERAL NONREPRESENTED_____

      GRID CODE: ___ Grid Eff Date: _____    Grid End Date: _____
                    Grid Type (P/S): _    Seniority Ref Date: _____
      Grid Name: _____

      GRID CODE: ___ Grid Eff Date: _____    Grid End Date: _____
                    Grid Type (P/S): _    Seniority Ref Date: _____
      Grid Name: _____

   Enter-PF1---PF2---PF3---PF4--PF5---PF6---PF7---PF8--PF9---PF10--PF11--PF12---
        HELP   RET   RNGS      G1ID  G2ID  G3ID       1           EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	**FUNCTION KEYS**	Pf 2 to return to prior screen.
		Pf 3 to view ranges associated with schedule. See next screen.
		Pf 5 to view identifiers associated with Grid 1, Pf 6 for Grid 2 or
		Pf 7 for Grid 3 if applicable.
		Pf 11 to exit the transaction.
		Pf 12 to return to the main menu.

```
HTTTM32                    HISTORICAL TITLE FILE              06/04/96
                             View Salary Schedule             02:59 PM
      As-of Date: 06-04-1996

      SCHEDULE: 01   Sched Eff Date: 04-14-1996    Sched End Date: 07-06-1996
                     Sched Payroll Authorization Date: 04-14-1996
      Schedule Name: GENERAL NONREPRESENTED_____

   **************** GRID(s) ASSOCIATED WITH THIS SCHEDULE ******************
   +------------------------------------------------------------------------+
   |  HTTTM33                                                                |
   |                 View RANGES ASSOCIATED WITH SCHEDULE  01                |
   |    00    01    02    03    04    05    06    07    08    09   10  11  12  13 |
   |    14    15    16    17    18    19    20    21    22    23   __  __  __  __ |
   |    __    __    __    __    __    __    __    __    __    __   __  __  __  __ |
   |                                                                        |
   | Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11-- |
   |      HELP  RET                                                          |
   +------------------------------------------------------------------------+
```

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)

View Title
Enter TITLE (space)

```
HTTTM0A                  HISTORICAL TITLE FILE              10/31/95
                             Main Menu                      12:37 PM



              1           As-of date:  10-31-1995





          2     Type of Information:  T        ( T )itle, Minmax ( R )ates

          3    Title Type:         _        ( C )lassified, ( U )nclassified,
                                            or ( S )tudent

          4    Title Code:         _____

            Salary Schedule:       __




Enter-PF1---PF2--PF3- -PF4---PF5---PF6---PF7---PF8-- PF9- -PF10--PF11--PF12---
      HELP                                                EXIT
```

ITEM	TITLE	DESCRIPTION
1	AS OF DATE	Enter the "As of" date you want to view the title. Defaults to today's date.
2	TYPE OF INFO	Enter T to view title.
3	TITLE TYPE	Enter C for classified title, U for Unclassified title or S for student title.
4	TITLE CODE	Enter numeric Title Code. If no entry made, you will view all the titles for the appropriate type. You can then select a title to view.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)

View Title Selection List

This screen will be displayed if you do not indicate a title code (or an invalid title code is entered).

```
HTTTM02                    HISTORICAL TITLE FILE                06/03/96
As-of Date: 06-03-1996      Title Selection List               02:59 PM
                                                           Title
          Title Code                Title Name              Eff Date
           00101     1    _   FINANCIAL SPEC 1           04-05-1992
           00102          _   FINANCIAL SPEC 2           04-05-1992
           00103          _   FINANCIAL SPEC 3           04-05-1992
           00104          _   FINANCIAL SPEC 4           04-05-1992
           00105          _   FINANCIAL SPEC 5           04-05-1992
           00106          _   FINANCIAL SPEC 1-CONF      03-17-1996
           00107          _   FINANCIAL SPEC 2-CONF      03-17-1996
           00109          _   FINANCIAL SPEC 4-CONF      03-17-1996
           00181          _   FINANCIAL SPEC SUPV 1      04-05-1992
           00182          _   FINANCIAL SPEC SUPV 2      04-05-1992
           00183          _   FINANCIAL SPEC SUPV 3      04-05-1992
           00184          _   FINANCIAL SPEC SUPV 4      04-05-1992
           00185          _   FINANCIAL SPEC SUPV 5      04-05-1992
           00186          _   FINANCIAL SPEC SUPV 6      04-05-1992
           00201          _   AUDITOR - ENTRY
           00202          _   AUDITOR - DEVELOP
  POSITION CURSOR ON TITLE AND PRESS ENTER TO SELECT
 Command ===> _____
 Enter-PF1---PF2---PF3--PF4--PF5--PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  RET          2              PREV  NEXT            EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	LINE COMMAND	Position cursor at title you wish to view, place any character on the line to mark it and press enter. Following screen is displayed.
2	FUNCTION KEYS	Pf 2 to return to prior screen. Pf 7 to go to previous Title Selection List page. Pf 8 to go to next Title Selection List page. Pf 11 to exit the transaction. Pf 12 to go to the Main Menu.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)

View Classified Title

```
HTTTM03                    HISTORICAL TITLE FILE                  06/03/96
                           View Classified Title                  02:48 PM
  As-of Date:  06-03-1996

  _  Title:       00102   Title Eff Date: 04-05-1992  Title End Date: _____
  _  Title Name:   FINANCIAL SPEC 2_____


     Fed EEO Category: 3      Fed EEO Subcategory: 5     EEO6 Job Group: 01
     FLSA:            N       WI Job Group:       ___

  _  Bargaining Unit: 02    CLERICAL & RELATED

1 _  Schedule-Range:   02 - 10

     Grid Code:       02_   ADMINISTRATIVE SUPPORT




 Command ===> _____
 Enter-PF1---PF2---PF3---PF4--PF5--PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       HELP  RET   MMAX          2        PREV  NEXT              EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	LINE COMMAND	Position cursor before any line (title, title name, b.u. or schedule-range) to view history. Place any character on the line to mark it and press enter.
2	FUNCTION KEYS	Pf 2 to return to prior screen. Pf 3 to go to the MinMax Rates screen. Pf 7 to move to the previous numeric Title page. Pf 8 to move to the next numeric Title page. Pf 11 to exit the transaction. Pf 12 to go to the Main Menu.

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)
View Unclassified Title

```
HTTTM04                    HISTORICAL TITLE FILE                  06/03/96
                           View Unclassified Title                04:06 AM
  As-of Date:  06-03-1996

  _  Title:      A33NN   Title Eff Date: _____   Title End Date: _____
  _  Title Name:   ASST SECY OF REGENTS_


     Fed EEO Category: 1     Fed EEO Subcategory: 1    EEO6 Job Group: 00
     FLSA:             E     Functional Area:    00
     Sort Order:   00070 2-Digit Class:      19

  _  Title Group:     C1  ACADEMIC ADMINISTRATOR
        If Title Group A, salary grade: __

1  _  Subj to tax withholding?  Y
   _  Subj to Soc Sec Taxes?    Y
   _  Covered by WRS?           Y

 Command ===> _____
 Enter-PF1---PF2---PF3---PF4--PF5--PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  RET  MMAX          2        PREV  NEXT  BU  FMOD  EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	LINE COMMAND	Position cursor before any line (title, title name, title group or whether title is subject to tax withholding, social security or covered by WRS) to view history. Place any character on the line to mark it and press enter.
2	FUNCTION KEYS	Pf 2 to return to prior screen. Pf 3 to go to the MinMax Rates screen. Pf 7 to go to previous Title page. Pf 8 to go to next Title page. Pf 9 to view unclassified bargaining unit if applicable. Pf 10 to view function modifier if applicable. Pf 11 to exit the transaction. Pf 12 to go to the Main Menu.

9.0   INQUIRY TRANSACTIONS

View Unclassified Rates
Enter TITLE (space)

```
HTTTM0A                    HISTORICAL TITLE FILE                10/31/95
                              Main Menu                        12:37 PM


                  1       As-of date:  10-31-1995




        2    Type of Information:   R_        ( T )itle, Minmax ( R )ates

        3   Title Type:            U_        ( C )lassified, ( U )nclassified,
                                             or ( S )tudent
+---------------------------------------------------------------------------+
|                                                    HTTTM30D              |
|   Please provide the following information:                             |
|                                                                         |
|  4 Institution:                                                         |
|                                                                         |
|     Title Code and/or Salary Grade is required.  If both are spcified   |
|    the salary grade must be correct for the given title code.           |
|  5     Title Code:    _____                                             |
|       Salary Grade: __                                                  |
|  TITLE CODE AND/OR SALARY GRADE MUST BE FILLED IN                       |
| Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11-- |
|      HELP  RET     6                                                   - |
  +---------------------------------------------------------------------------+
```

ITEM	TITLE	DESCRIPTION
1	AS OF DATE	Enter the "As of" date you want to view the title. Defaults to today's date.
2	TYPE OF INFO	Enter R to view rates.
3	TITLE TYPE	Enter U for unclassified title.
4	INSTITUTION	Enter Institution
5	TITLE CODE/ SALARY GRADE	Enter Title Code and/or Salary Grade.
6	FUNCTION KEYS	Pf 2 to return to prior screen.

9.0   INQUIRY TRANSACTIONS

9.5   HISTORICAL TITLE FILE INQUIRY (cont.)
View Unclassified MinMax Rates

```
HTTTM35                      HISTORICAL TITLE FILE                06/04/96
                     View Hist Inst Minmax w/System Defaults        01:09 AM
   As-of Date: 06-04-1996              Institution: A   MADISON
   Title: L12LL  ASST DIR, LIBR (L)    Salary Grade: 08  (GRADE HAS CHGD)
    Type      Begin Date         Minimum      Midpoint        Maximum
    A-basis:
     S        10/01/1995        47,118.000   58,897.000     70,676.000
     S        07/01/1995        47,030.000   58,787.000     70,544.000
     S        01/01/1995        46,564.000   58,205.000     69,846.000
     S        07/01/1994        45,677.000   57,096.000     68,515.000
     S        07/01/1993        44,346.000   55,433.000     66,520.000


    C-basis:
     S        10/01/1995        38,551.000   48,188.000     57,826.000
     S        09/05/1995        38,479.000   48,099.000     57,718.000
     S        01/20/1995        38,098.000   47,622.000     57,146.000
     S        08/29/1994        37,372.000   46,715.000     56,057.000
     S        09/07/1993        36,284.000   45,354.000     54,425.000

  Enter-PF1---PF2---PF3---PF4---PF5--PF6--PF7---PF8---PF9---PF10--PF11--PF12---
        HELP  RET        G HST      1                         EXIT  MENU
```

ITEM	TITLE	DESCRIPTION
1	**FUNCTION KEYS**	Pf 2 to return to prior screen.
		Pf 4 to view history if salary grade has changed. See following screen.
		Pf 7 to go to previous page if applicable.
		Pf 8 to go to next page if applicable.
		Pf 11 to exit the transaction.
		Pf 12 to go to the Main Menu.

```
HTTTM35                      HISTORICAL TITLE FILE                06/04/96
                     View Hist Inst Minmax w/System Defaults        01:07 AM
   As-of Date: 06-04-1996              Institution: A   MADISON
   Title: L12LL  ASST DIR, LIBR (L)    Salary Grade: 08  (GRADE HAS CHGD)
    Type      Begin Date         Minimum      Midpoint        Maximum
    A-basis:
     S        10/01/1995        47,118.000   58,897.000     70,676.000
     S        07/01/1995        47,030.000   58,787.000     70,544.000
     S        01/01/1995        46,564.000   58,205.000     69,846.000
     S        07/01/1994        45,677.000   57,096.000     68,515.000
   +-------------------------------------------------------------------+
   | HTTTM15                    View Historical Title Group             |
   |   Title                                                           |
   |    Code          Eff Date     Group   Grade      Title Group Name  |
   |   L12LL         10-01-1995     A3      08    ADMINISTRATIVE DIRECTOR|
   |                                A3      07    ADMINISTRATIVE DIRECTOR|
   | Enter-PF1---PF2---PF3---PF4--PF5--PF6---PF7---PF8---PF9---PF10--PF11-- |
   |      HELP  RET                      PREV  NEXT                EXIT | -
   +-------------------------------------------------------------------+
```

9.0   INQUIRY TRANSACTIONS

9.6   INTERNATIONAL FORMS INQUIRY

This screen displays international tax information for an employee.

Enter PYFMI (space) Social Security Number

```
PLEASE ENTER SSN OR PERSON-ID
                  International Tax Forms Information        Program:  PYFMP01

 Next SSN #/Person ID:  _____

Name:                              Country:
 Person ID:
      SSN:    -  -          Standard Exclusion:
 YTD Gross:           YTD Codes: 15:          18:            19:
                                                                   Rev
 Form #  Form Name                 Type of Date   Date      Entry Date  Stmnt
  1123   ALIEN TAX INFORMATION       1st US Entry 1 __ __ ____

  1078   BENEFIT OF US RESIDENCE        Effective 2 __ __ ____

  1001   REDUCED RATE CERTIFICATE      Expiration 3__ __ ____
                                                     __ __ ____

  8233   EXEMPTION FROM WITHHOLDING   Expiration 4 __ __ ____           5    _
                                                     __ __ ____              _
 Tax Override (According to W4): _   (Y/N) 6         __ __ ____              _
      Substantial Presence Date: __ __ ____7                 Exception Found:
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7--PF8--PF9---PF10--PF11--PF12---
                               DELE              PYFM2       EXIT
```

ITEM	TITLE	DESCRIPTION
1	**FORM #1123 DATE**	Displays the first date of USA entry from Form #1123.
2	**FORM #1078 DATE**	Displays the effective date from Form #1078.
3	**FORM #1001 DATE**	Displays the expiration date from Form #1001.
4	**FORM #8233 DATE**	Displays the exemption expiration date from Form #8233.
5	**REV PROC STMNT**	Y. indicates receipt of Revenue Procedure Statement. N indicates none.
6	**TAX OVERRIDE**	Y indicates a tax override for a student from India or employee from Korea, Japan, Mexico & Canada.
7	**SUBSTANTIAL PRESENCE DATE**	Displays the Substantial Presence Date

9.0   INQUIRY TRANSACTIONS

9.7   LOCAL UNION MEMBER INQUIRY

This screen displays the union membership status of an employee.

Enter IMBR (space) Social Security Number

```
NAME BAYLOR, JOHN                 PERSON ID 00055450         PAGE  1      IMBR
 PAYROLL ID 333-11-1111                                       AS OF 07 19 1996
1 CURRENT MEMBERSHIPS      CHAPTER       CHAPTER      LOCAL BEGIN & END DATE
                          BEGIN DATE    END DATE      DUES BEGIN & END DATE

2 _  LOCAL 0001 LOCAL NAME TEACHING ASST ASSN - MADISON    09 01 1988
               CHAPTER                                      09 01 1988




NEXT _____3_____             TP EXIT ___3_____
                                     4
 1)HELP 2)...3)...  4)LMBR 5)LCHP 6)IDED 7)PAST 8)CURR 9)FUT  10)-1  11)EXIT
```

ITEM	TITLE	DESCRIPTION
1	MEMBERSHIPS	Displays the Membership Status of employee (Current, Past, or Future Memberships).
2	CHAPTER/ LOCAL BEGIN & END	Displays the Begin and End dates for the Chapter and the Local.
3	NEXT/TP EXIT	Enter the information required by the transaction in the NEXT field and the transaction you want to access in TP EXIT field (if PF key does not apply).
4	FUNCTION KEYS	Press PF 4 to go to LMBR to update employee. Press PF 6 to go to IDED to view deduction. Press PF 7 to view past memberships. Press PF 9 to view future memberships. Press PF 11 to exit the transaction.

9.0 INQUIRY TRANSACTIONS

9.8 LTE INQUIRY

This screen shows historical detail and totals of hours paid since the employee's anniversary date. It is used to determine when LTE status should cease (total hours). It can also be used to determine average biweekly earnings for ICI.

Enter LTEI (space) SSN

```
LTE MONITORING


 1  SSN 388888888    NAME BLUTARSKY, SENATOR
 2  LTE TYPE 09       ANNIVERSARY DATE 10 09 95
    3                          4       5      6                              7
  PERIOD     UDDS    TITLE/M TRAN TRAN  RATE  REG-HR   OT-HR   PR-HR     GROSS
 10 14 95 A030500   16102 L 22 A      7.500   20.0    0.0     0.0     150.00
 10 28 95 A030500   16102 L           7.500   40.0    0.0     0.0     300.00
 11 11 95 A030500   16102 L           7.500   38.5    0.0     0.0     288.75
 11 25 95 A030500   16102 L           7.500   36.0    0.0     0.0     270.00




TYPE 09 ANIV.DATE 10 09 95 ALL HR  8   134.5  134.5    0.0     0.0   1008.75
  NO MORE RECORDS                                    ...... ....... ....
                                                     SIGNON SIGNOFF AVAL
                                      9              =-1... =1..... =+0.
                                                            /EXIT
```

ITEM	TITLE	DESCRIPTION
1	**SSN/NAME**	Displays SSN and Name of Employee.
2	**LTE TYPE/ ANNIVERSARY**	Displays LTE Type and the Anniversary of this Appointment. Will display a separate screen for each LTE appointment.
3	**PAYPERIOD**	Displays the pay period employee was paid on.
4	**TRANS**	Displays any Classified Transaction Code that occurred for pay period.
5	**RATE**	Displays the hourly rate employee was paid.
6	**HRS**	Displays the regular, overtime and prior hours the employee was paid.
7	**GROSS**	Displays the Gross amount paid to employee.
8	**ALL HRS**	Displays the total number of hours since the anniversary date that the employee has been paid.
9	**FUNCTION KEYS**	Press PF 9 to view prior page. Press PF 10 to view next page Press PF 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.9   NAME INQUIRIES

9.9.1 Name Change Inquiry

This screen displays any name change that has been processed for an employee.

Enter NCNU (space) SSN

```
1   NEW NAME  BLUTARSKY, SENATOR              SSNO 388-88-8888    NEW EID 121212
                                              PERSON ID 00050341
    OLD NAME                                  LEGAL NAME CHG     OLD EID



                       PREVIOUS NAME / NUMBER CHANGES
       2    OLD NAME               OLD EID  LGL CHG CHANGE DATE   NEW EID   UPDATE
                                         3






    NEXT SSN        4

                                             ...      ...      ...
        ** NO CHANGE TO PAYROLL ON-LINE FILES **    ...      ...      ...
                                             =-1      =1       =+0
                                             /HOLD   /EXIT    ...
```

ITEM	TITLE	DESCRIPTION
1	**NEW NAME/**	Displays the New Name.
2	**PREVIOUS NAME**	Displays the Previous Name.
3	**LEGAL NAME CHG/DATE**	Displays if this is a legal name change (Y) or just a correction of prior entry (N) and the date of the Change.
4	**NEXT SSN**	Enter next SSN you wish to view or PF 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.9   NAME INQUIRIES (cont.)

9.9.2 Name Look Up

This screen allows you to look up an employee phonetically when the SSN is unknown.

Enter CNAM (space) Last Name, First Name

```
1 INQ WAS:  DOE<,                       SEX:   TYPE:   UD:    PG 01 OF 02

 DOE, JAQNE E                              CAMPUS:
2 TRANS:      277777777                       NO CAMPUS ADDRESS GIVEN
       NO TITLE
       NO UDDS FOUND
                                          HOME:
                                          NO HOME ADDRESS GIVEN
PERSON ID:     ********
DOB:  01-21-43
                              EMAIL:
---------------------------------------- ----------------------------------------
DOE, john W                    (H)        CAMPUS:
TRANS:     101111111                          NO CAMPUS ADDRESS GIVEN
       NO TITLE
       NO UDDS FOUND
                                          HOME:
                                          NO HOME ADDRESS GIVEN
PERSON ID:     ********
DOB:  09-17-48
                              EMAIL:

(...   ...   ...) (SIGNON  SIGNOFF  AVAL) (=-1   =1   =+0) (/REL  /EXIT   ...)
```

If entry was not in proper format, this screen advises you proper format.

```
              YOUR INQUIRY WAS :

                  INQUIRY NAME NOT IN PROPER FORMAT

              PROPER FORMAT IS :  LASTNAME, FIRSTNAME MI/SEX/TYPE/UD
                                SEX, TYPE, AND UD ARE OPTIONAL
              CORRECT ENTRY ABOVE AND PRESS ENTER






...      ...      ...
                                          SIGNON  SIGNOFF  AVAL
                                          =-1       =1       =+0
                                          /REL    /EXIT       ...
```

9.0   INQUIRY TRANSACTIONS

9.9   NAME INQUIRIES (cont.)
9.9.2 Name Look Up (cont.)
Enter CNAM (space) Last Name, First Name

```
1 INQ WAS:  DOE<,                        SEX:   TYPE:    UD:     PG 01 OF 02

 DOE, JAQNE E                                  CAMPUS:
2 TRANS:      277777777                        NO CAMPUS ADDRESS GIVEN
       NO TITLE
       NO UDDS FOUND

                                           HOME:
                                           NO HOME ADDRESS GIVEN
PERSON ID:      ********
DOB:  01-21-43
                               EMAIL:
-------------------------------------- --------------------------------------
DOE, john W                    (H)         CAMPUS:
TRANS:      101111111                      NO CAMPUS ADDRESS GIVEN
       NO TITLE
       NO UDDS FOUND

                                           HOME:
                                           NO HOME ADDRESS GIVEN
PERSON ID:      ********
DOB:  09-17-48
                               EMAIL:


(...   ...   ...) (SIGNON  SIGNOFF  AVAL) (=-1   =1   =+0) (/REL  /EXIT   ...)
```

ITEM	TITLE	DESCRIPTION
1	FORMAT	Enter Last Name, First Name/sex/type (c= classified, u = unclassified)/UD. Minimum entry is last name, (comma must be included). Anything else entered narrows the search. Will show up to 30 pages.
2	TRANS	Employee's SSN is displayed on this line. Tab to line before SSN and enter transaction you want to access next, i.e. APPR.
	ENTER	Press enter after selection. Transaction you requested for employee will be displayed.

9.0   INQUIRY TRANSACTIONS

9.10   PAYMENT DISBURSEMENT INQUIRY
This screen displays an employee's direct deposit authorization.
Enter PAYI (space).

```
+---------------------------------------------------------------------+
|              Welcome to the Payment Disbursement System             |
|                                                                     |
|      << Does your terminal support special attributes (Y/N)? _ >>   |
|                                                                     |
|     If you enter 'Y' and then get 'stuck' on this screen, your terminal |
|     does not support special attributes.  Press PF3 twice to exit and   |
|     try the transaction again, entering 'N' instead.  Use '.' to exit.  |
|                                                                     |
|                                                                     |
|  +----------------------------------------------------------------+ |
+---------------------------------------------------------------------+
```

OR

Enter PAYI (space) Y to get the Main Menu screen.

```
ACPAYP1              PAYI: Payment Disbursement Update          ACPAYM1
 04/10/96                       Main Menu                       9:28 AM


        Select                              Find By     Example

         1       Direct Deposit Authorization   SSN      123456789
         2       Direct Deposit Authorization   Name     SEQUOIA, J
         3       Direct Deposit Authorization   UPID     1234567890

         4       Payment Audit Trail            SSN      123456789
         5       Payment Audit Trail            Name     SEQUOIA, J
         6       Payment Audit Trail            UPID     1234567890

 1  Select: _    Find by: _____


 Direct Command: _____
Enter-PF1--PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     help        quit
 Type a Select code and ENTER.
```

ITEM	TITLE	DESCRIPTION
1	**SELECT**	Select option you wish to view from selection provided. To view a Direct Payment Authorization, select option 1, 2, or 3 and enter appropriate field of SSN, Name or UPID. To view a payment audit trail and view each payment; select option 4, 5, or 6, and enter appropriate field of SSN Name or UPID.

9.0   INQUIRY TRANSACTIONS

9.10   PAYMENT DISBURSEMENT INQUIRY (cont.)

To bypass the main menu, use the fast path entry to go directly to the Display Direct Deposit
Authorization screen.

Enter PAYI (space) Y (space) SSN

```
ACPAYP2        2    PAYI: DISPLAY Direct Deposit Authorization        ACPAYM2
02/20/96                                                              3:29 PM
   3   SSN: 388-88-8888   BLUTARSKY, SENATOR         Female    DOB: 02/02/45
       UPID: 992

   4   Effective Date ...: 02 23 1996        PENDING AUTHORIZATION


      *ABA Routing Number: 275071398         SECURITY BANK, S.S.B.
   5                                          184 W WISCONSIN AVE
       Account Number ...: 1_____   MILWAUKEE, WI 53203-2507

       Type of Account ..: C  (C=Checking, S=Savings)

                                           6   Next SSN:  _____
                                               Next UPID: _____

Direct Command: _____ (02/09/96 *RB2)
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
       help  retrn quit  CHNG  STOP AUDIT     7                      menu
```

ITEM	TITLE	DESCRIPTION
2	**DISPLAY**	If bank account information in system, you will get the Display screen. If no bank account information in system, you will get the menu screen with message that no direct deposit authorization exists.
3	**SSN, NAME, GENDER, DOB**	Identifying Information will be displayed if the Person ID exists.
4	**EFFECTIVE DATE**	Date will reflect the effective date of the payment disbursement or the last change made to this account.
5	**ABA ROUTING/ ACCT NUMBERS ACCT TYPE**	ABA Routing Number, Bank and Type of Account is displayed, but not the Account Number
6	**NEXT SSN/UPID**	To view a Direct Deposit authorization for another employee, enter SSN at NEXT SSN.
7	**FUNCTION KEYS**	Press pf 1 to display Help for displayed screen. If cursor is on field prefaced with "*", valid data values will be displayed for that field. Press pf 2 to return to previous screen without entry. Press pf 3 to quit (exit) the transaction. Press pf 6 to display audit trail screen on next page. Press pf 12 to return to the main menu.

9.0 INQUIRY TRANSACTIONS

9.10 PAYMENT DISBURSEMENT INQUIRY (cont.)

To bypass the prior screen, use the fast path entry to go directly to the Payment Audit Trail screen.

Enter PAYI (space) Y (space) 4/SSN

```
ACPAYP5U            PAYI Payment Audit Trail List, by UPID          ACPAYM5U
07/25/96                       For UPID # 992                        1:11 PM
                                                            Transaction
Action Name                          Feeder   Net Amount    Date      Type
------ ------------------------------ ---------- ----------- -------- --------
1 _     BLUTARSKY, SENATOR           UW-PAYROLL    874.78 07/18/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    860.05 07/03/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    166.90 06/28/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    874.77 06/20/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    860.05 06/06/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    847.55 05/23/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    865.48 05/09/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    852.98 04/25/96    ACH
  _     BLUTARSKY, SENATOR           UW-PAYROLL    880.21 04/11/96    ACH
  _     BLUTARSKY, SENATOR           PRENOTES             03/20/96 Prenote
  _     BLUTARSKY, SENATOR           PRENOTES             02/27/96 Prenote
                          *** End of Data ***



2 Next UPID: _____   Payments on or before: __ __ __   (MM DD YY)
 Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7--PF8---PF9---PF10--PF11--PF12---
     help  retrn quit               AUTH  up    down                     menu
 Type a Select code and ENTER.                 3
```

ITEM	TITLE	DESCRIPTION
1	**LINE COMMAND**	Place an "X" before the line you wish to view. Detail for payment is displayed as on following screen.
2	**NEXT UPID**	Enter next UPID and/or date you wish to view payments.
3	**FUNCTION KEYS**	Press pf 2 to return to previous screen. Press pf 3 to quit (exit) the transaction. Press pf 6 to display Authorization History as shown on the next page. Press pf 7 to scroll up to another page. Press pf 8 to scroll down to the next page. Press pf 12 to return to the main menu.

9.0 INQUIRY TRANSACTIONS

9.10 PAYMENT DISBURSEMENT INQUIRY (cont.)

```
ACPAYP4            PAYI: Payment Audit Trail Display           ACPAYM4A
07/25/96                                                        1:14 PM

 Name ....: BLUTARSKY, SENATOR              Net Amount ..: 874.78
 SSN .....: 388888888                       Payment Date : 07/18/96
 UPID ....: 992
 Reference:                                 Feeder Office: UW-PAYROLL


= = = = = = = = = = = = = =  ACH INFORMATION  = = = = = = = = = = = = = = = = =

 Bank Routing # ..: 275071398            SECURITY BANK, S.S.B
                                         184 W WISCONSIN AVE
 Bank Account Type: Savings              MILWAUKEE, WI 53203-2507

 ACH Transmission Group #: 199           Payment Sent: 07/11/96 11:55 PM
 ACH Trace # ............: 0115

        Voucher .: 00799        Group ID : 199607700
        Group Req: 233          Memo Text: PAYROLL

Direct Command: _____
Enter-PF1---PF2---PF3--PF4--PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     help  retrn quit              AUTH         1                      menu
```

ITEM	TITLE	DESCRIPTION
1	FUNCTION KEYS	Press pf 2 to return to previous screen.
		Press pf 3 to quit (exit) the transaction.
		Press pf 6 to return to Authorization screen.
		Press pf 7 to scroll up to another page.
		Press pf 8 to scroll down to the next page.
		Press pf 12 to return to the main menu.

```
ACPAYPH          PAYI: Direct Deposit Authorization History        ACPAYMH
07/25/96                                                            1:57 PM
BLUTARSKY, SENATOR               UPID: 992          MALE DOB: 02/25/45
SSN: 388888888

  Start    Stop   Bank ABA                  Acct   Start Date    Stop Date
 Date     Date    Routing #  Account Number  Type  and Logon ID  and Logon ID
------- -------- ---------- ---------------- ---- ------------- -------------
01/30/96          275071398                   S   01/30/96 *KOR
                 SECURITY BANK, S.S.B , MILWAUKEE WI 53203-2507

                    *** End of Data ***



Direct Command: _____
Enter-PF1---PF2---PF3--PF4---PF5---PF6---PF7--PF8---PF9---PF10--PF11--PF12---
     help  retrn quit              1           up    down              menu
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES

9.11.1 Payroll Control File Inquiry

This screen displays the total amount paid, the total hours and total number of employees in a Section or Section/PEG and is used to verify entry totals.

Enter PCLI (space) Section or PCLI (space) Section/PEG

```
SECTION PF                                  STATUS A   PAYROLL ENTRY GRP  LVAC
 CALC 9512300  VOUCHER 99999     PAY DATE 12 07 95   A    F                  Y
 PAY TYPE    B          MONTH EARNED   11
 GROUP CODE  C          FISCAL YEAR    6
 FORMAT      1          BIWEEKLY DATE  11 25 95
 ADJ BEGIN DATE           END DATE
 UPDATE    SCH   11 13 95   WS SEM     YEAR
                            CURRENT       PRIOR
1  TOTAL AMOUNT PAID
2  TOTAL ALL HOURS           1,426.0
    REGULAR                  1,280.0
    REGULAR - ADJ               80.0
    NEG GROSS
    OVERTIME                    35.0
    OVERTIME - ADJ
    DIFFERENTIAL                31.0
    STANDBY
    ADDED RESPONSIBILITY
  UNIFORM ALLOWANCE
3  TOTAL EMPLOYEES              19                 ...      ...      ...
  VACATION               SICK LEAVE            SIGNON   SIGNOFF  AVAL
  PERSONAL HOL           LEGAL HOL         4   =-1      =1       =+0
  COMP EARNED            COMP USED            /RELEASE /EXIT    ...
```

ITEM	TITLE	DESCRIPTION
1	**TOTAL AMOUNT PAID**	Displays total gross amount paid for section.
2	**TOTAL ALL HOURS**	Displays total of all hours paid in section. Will equal the grand total of the "individual pay types total hours" listed.
3	**TOTAL EMPLOYEES**	Displays total number of employees in this section. Employees on loa will be included in the count even if not paid.
4	**FUNCTION KEYS**	Pf 11 to exit the transaction after viewing.

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)

9.11.2 Payroll History Inquiry

Payroll History displays payroll calculation history for an employee through various screens.

Enter PHIQ (space)

```
PHIQ                     PAYROLL CALCULATION HISTORY INQUIRY

 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: _

          A.   CALCULATION SCHEDULE INQUIRY

          B.   EMPLOYEE INQUIRY
                    PAYMENTS
                    DEDUCTIONS
                    PAYROLL DISBURSEMENTS
                    PERSONNEL TRANSACTIONS
                    APPOINTMENTS
                    CALCULATION INFO

          C.   PAYROLL DISBURSEMENT INQUIRY

          D.   DEDUCTION CONTROL INQUIRY




             1  (11) EXIT
```

ITEM	TITLE	DESCRIPTION
1	**FUNCTION KEYS**	In Payroll History the following function keys apply if shown on the screen. Pf 2 (NEXT) takes you to the next screen at the same level. Pf 3 (PREV) takes you to the previous screen on the same level. Pf 4 (GOBACK) takes you back one level. Pf 5 (MENU) takes you back to the main menu screen. Pf 11 (EXIT) exits you from the Payroll History transaction
	ENTER	Press enter after making requested selection on each screen

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Calculation Schedule Inquiry

The Calculation Selection Screen is the same as the CSCI inquiry screen with the exception that it only shows Calculations that have been made (History only).

Enter PHIQ (space)

```
PHIQ                    PAYROLL CALCULATION HISTORY INQUIRY


 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: A_


           A.   CALCULATION SCHEDULE INQUIRY

           B.   EMPLOYEE INQUIRY
                    PAYMENTS
                    DEDUCTIONS
                    PAYROLL DISBURSEMENTS
                    PERSONNEL TRANSACTIONS
                    APPOINTMENTS
                    CALCULATION INFO

           C.   PAYROLL DISBURSEMENT INQUIRY

           D.   DEDUCTION CONTROL INQUIRY



                (11) EXIT
```

Fast path entry is PHIQ (space) A

```
PHIQ                    CALCULATION SELECTION SCREEN                    A


  ENTER CALC #  _____   -OR- CHOOSE ONE OF THE FOLLOWING:
                             PAID MONTH         __ __        (MM YY)
                             EARNED MONTH       11 95        (MM YY)
                             PROCESSED SINCE    __ __ __     (MM DD YY)
                             PAYABLE SINCE      __ __ __     (MM DD YY)

                             SELECT A TYPE OF CALCULATION TO REVIEW: _
                             (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED,
                             BLANK = ALL)




  (1) HELP        (4) GOBACK     (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Calculation Schedule Selection List
Fast path entry is PHIQ (space) A/CALC #

```
PHIQ                CALCULATION SCHEDULE SELECTION LIST              A-1

     CALC #       CALCULATION         STATUS  EARNED  PAY DATE   PROCESS DATE
01  9511600  NOV A STUDENT              C     11/95   11/17/95    11/09/95
02  9511620  SPEC CLS PAYROLL           C     11/95   11/17/95    11/09/95
03  9511630  SPEC UNCLS PAYROLL         C     11/95   11/17/95    11/09/95
04  9511640  SPEC EXT UNCLS PAYRO       C     11/95   11/17/95    11/09/95
05  9511700  NOV A CLASSIFIED           C     11/95   11/22/95    11/16/95
06  9511720  SPEC UNCLS PAYROLL         C     11/95   11/22/95    11/16/95
07  9511730  SPEC STUDENT PAYROLL       C     11/95   11/22/95    11/16/95
08  9511740  SPEC CLS PAYROLL           C     11/95   11/22/95    11/16/95
09  9511750  SPEC WSEU TERM PAY         C     11/95   11/22/95    11/16/95
10  9511760  SPEC DEATH CLAIM           C     11/95   11/22/95    11/16/95
11  9511770  SPEC DEATH CLAIM CLS       C     11/95   11/22/95    11/16/95
12  9512010  NOV B STUDENT              C     11/95   12/01/95    11/22/95
13  9512020  SPEC CLS SETTLEMENT        C     11/95   12/01/95    11/22/95
14  9512030  SPEC UNCLS P/R             C     11/95   12/01/95    11/22/95


    03   ENTER LINE NUMBER FOR INDIVIDUAL CALC DETAIL


 SELECTION CRITERIA USED: ALL EARNED 11/95
                 *******  MORE ON NEXT PAGE  *******
 (1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

Calculation Schedule Detail
(See CSCI for definitions of fields.)

```
PHIQ                CALCULATION SCHEDULE DETAIL                  A-1-1

      CALC # 199511720 - SPEC UNCLS PAYROLL
        STATUS            C  CALCULATED
        EARNED            11/95
        PAY DATE          11/22/95
        PROCESSED         11/16/95
        GROUP             E   END OF MONTH FACU
        CALC TYPE         S   SUPPLEMENTAL
        RETRO PAYROLL     N NO
        WITHHOLD METHOD   R REGULAR
        DED METHOD        R REGULAR
        DED PERIOD        11/95
        VOUCHER           06448
        FISCAL YEAR       96
        PERIOD            M  MONTHLY
        MESSAGE           U UNSPECIFIED MESSAGE
          BEGIN  10/01/95     END  10/31/95
          CHECKS              TO

 (1) HELP    (2) NEXT    (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

Employee Inquiry
Enter PHIQ (space)

```
PHIQ                 PAYROLL CALCULATION HISTORY INQUIRY


 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: B_
          A.   CALCULATION SCHEDULE INQUIRY


          B.   EMPLOYEE INQUIRY
                  PAYMENTS
                  DEDUCTIONS
                  PAYROLL DISBURSEMENTS
                  PERSONNEL TRANSACTIONS
                  APPOINTMENTS
                  CALCULATION INFO


          C.   PAYROLL DISBURSEMENT INQUIRY


          D.   DEDUCTION CONTROL INQUIRY








                  (11)  EXIT
```

Fast path entry is PHIQ (space) B

```
PHIQ                      EMPLOYEE INQUIRY                          B

        PERSON ID/SSN:  _____

 SELECT ONE OF THE FOLLOWING INQUIRY TYPES: 1_
     1.   PAYMENTS
     2.   DEDUCTIONS
     3.   PAYROLL DISBURSEMENTS
     4.   PERSONNEL TRANSACTIONS
     5.   APPOINTMENTS
     6.   CALCULATION INFO

 ENTER CALC # _____     -OR- CHOOSE ONE OF THE FOLLOWING:
                              PAID MONTH          __ __        (MM YY)
                              EARNED MONTH        __ __        (MM YY)
                              PROCESSED SINCE     __ __ __     (MM DD YY)
                              PAYABLE SINCE       __ __ __     (MM DD YY)

                          SELECT A TYPE OF CALCULATION TO REVIEW: _
                      (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)

  (1) HELP        (4) GOBACK     (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Payment List
Fast path entry is PHIQ (space) B/SSN/1/CALC #

```
PHIQ                    EMPLOYEE PAYMENT LIST             PAGE  1      B-1


 BLUTARSKY, SENTATOR                    PERSON ID 0001111   SS# 388-88-8888

 NOV A CLASSIFIED             CALC ID 9511700 CHANGE ID        CURRENT
     APPT ID 00022222   TITLE 21000 DIETITIAN 1
        UDDS      ACT FND    ACCT    GROSS PD  PAY TYPE  HOURS   PYMT RATE
 01  A544000      1  101           960.00       H      80.0       12.000





 NOV B CLASSIFIED             CALC ID 9512300 CHANGE ID        CURRENT
     APPT ID 00022222   TITLE 21000  DIETITIAN 1
        UDDS      ACT FND    ACCT    GROSS PD  PAY TYPE  HOURS   PYMT RATE
 02  A544000      1  101           480.00       H      40.0       12.000

    02 ENTER LINE NUMBER FOR EMPLOYEE PAYMENT DETAIL
    SELECTION CRITERIA USED: ALL EARNED 11/95

                 *******  END OF LISTINGS  *******
 (1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU  (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

Employee Payment List
Fast path entry is PHIQ (space) B/SSN/1/CALC #

```
PHIQ                    EMPLOYEE PAYMENT LIST              PAGE  1      B-1

 BLUTARSKY, SENTATOR                   PERSON ID 0001111   SS# 388-88-8888

NOV A CLASSIFIED               CALC ID 9511700 CHANGE ID        CURRENT
    APPT ID 00022222   TITLE 21000 DIETITIAN 1
        UDDS      ACT FND   ACCT    GROSS PD  PAY TYPE  HOURS   PYMT RATE
01  A544000      1  101       960.00      H     80.0       12.000

NOV B CLASSIFIED               CALC ID 9512300 CHANGE ID     HISTORICAL   1
    APPT ID 00022222   TITLE 21000 DIETITIAN 1
        UDDS      ACT FND   ACCT    GROSS PD  PAY TYPE  HOURS   PYMT RATE
02  A544000      1  101       960.00      H     80.0       12.000

NOV B CLASSIFIED               CALC ID 9512300 CHANGE ID       CURRENT    2
    APPT ID 00022222   TITLE 21000 DIETITIAN 1
        UDDS      ACT FND   ACCT    GROSS PD  PAY TYPE  HOURS   PYMT RATE
02  A544000      1  101       480.00      H     40.0       12.000

   02 ENTER LINE NUMBER FOR EMPLOYEE PAYMENT DETAIL
   SELECTION CRITERIA USED: ALL EARNED 11/95


             ******* END OF LISTINGS *******
(1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

ITEM	TITLE	DESCRIPTION
1	**HISTORICAL**	If there has been a check correction, payroll history will reflect what the employee was paid as Historical.
2	**CURRENT**	The corrected entry will show under Current for the same pay period.

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Payment Detail

```
PHIQ                    EMPLOYEE PAYMENT DETAIL                    B-1-1

 BLUTARSKY, SENATOR                 PERSON ID 00021111      SS# 388-88-8888
 NOV B CLASSIFIED                   CALC ID 9512300
 CHANGE ID                   CHANGE REASON                         CURRENT
 APPT ID   0002222               TITLE 21000 DIETITIAN 1


 GROSS PAID   960.00    PAY TYPE             SALARY
 HOURS          80.0    PYMT RATE             12.000
 PAY BASIS  H           AUTHORIZED HOURS      80.00


 FY 96  FUND 101  ACCT       UDDS A540000     ACT 1   CLASS 1521   1
                                             PAR 11
 SECTION 01 PEG A5400                   WRS SERVICE HOURS  80.0

 FED TAX DEDUCTION  A01             STATE TAX DEDUCTION B01
 UC WAGE DEDUCTION  U01
 SS/FICA            C03             RETR R01     BAC S01
 EARNED PERIOD      11/95           WORKSTUDY PERIOD
 PYMT BEG-END       11/12/95-11/25/95



 (1) HELP    (2) NEXT    (3) PREV   (4) GOBACK   (5) MENU    (11) EXIT
```

ITEM	TITLE	DESCRIPTION
1	**CLASS**	Last 2 digits of Class Code represent the appointment type: 10 = Ad Hoc 11 = Faculty 19 = Academic Staff/Limited 21 = Classified Permanent 22 = Classified LTE 26 = Classified Project 17 = Research Associates 41 = Fellows/trainees/scholars 47 = Post Docs 61 = Research Assistants 71 = Teaching Assistants 80 = Undergrad Assistants 81 = Project/Program/Grad Assistants 82 = Undergrad Interns 91 = Grad Interns/Trainees/Housefellows

9.0   INQUIRY TRANSACTIONS

Employee Inquiry
Enter PHIQ (space)

```
PHIQ                 PAYROLL CALCULATION HISTORY INQUIRY

 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: B

          A.   CALCULATION SCHEDULE INQUIRY

          B.   EMPLOYEE INQUIRY
               PAYMENTS
               DEDUCTIONS
               PAYROLL DISBURSEMENTS
               PERSONNEL TRANSACTIONS
               APPOINTMENTS
               CALCULATION INFO

          C.   PAYROLL DISBURSEMENT INQUIRY

          D.   DEDUCTION CONTROL INQUIRY




          (11) EXIT
```

Fast path entry is PHIQ (space) B

```
PHIQ                      EMPLOYEE INQUIRY                        B

      PERSON ID/SSN:  _____

 SELECT ONE OF THE FOLLOWING INQUIRY TYPES: 2
      1.   PAYMENTS
      2.   DEDUCTIONS
      3.   PAYROLL DISBURSEMENTS
      4.   PERSONNEL TRANSACTIONS
      5.   APPOINTMENTS
      6.   CALCULATION INFO

 ENTER CALC # _____     -OR- CHOOSE ONE OF THE FOLLOWING:
                           PAID MONTH      __ __       (MM YY)
                           EARNED MONTH    11 95       (MM YY)
                           PROCESSED SINCE __ __ __    (MM DD YY)
                           PAYABLE SINCE   __ __ __    (MM DD YY)

                      SELECT A TYPE OF CALCULATION TO REVIEW: _
                 (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)

  (1) HELP       (4) GOBACK    (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.2Payroll History Inquiry (cont.)
Employee Deduction List
This screen lists deductions within a calculation for an employee. COMP AMT means computing amount and is the amount of gross pay used to calculate the deduction.
Fast path entry is PHIQ (space) B/SSN/2/CALC #

```
PHIQ                       EMPLOYEE DEDUCTION LIST        PAGE  1      B-2

 BLUTARSKY, SENATOR                  PERSON ID 000211111    SS# 388-88-8888

 NOV A CLASSIFIED           CALC ID 9511700  CHANGE ID        CURRENT
                                                   REASON
         DEDUCTION                      COMP AMT  NOT TAKEN    AMOUNT
 01 A01    FEDERAL TAX                   $1337.08             $208.70
 02 B01    WISCONSIN TAX                 $1337.08              $83.30
 03 C03    SOCIAL SECURITY               $1337.08              $82.90
 04 F03    FICA                          $1337.08              $19.38
 05 R01    RETIREMENT                    $1352.08               $0.00
 06 S01    RETIREMENT BAC                $1352.08               $2.70
 07 U01    UC WAGE REPORT-MADISON        $1352.08               $0.00
 08 301    ERA MEDICAL                                         $15.00
 09 4DB    GHC-SO CENTRAL WISC                                  $0.00
 10 414    STATE GROUP LIFE INS                                $18.00
                                       PAGE TOTAL TAKEN       $429.98

   __  ENTER LINE NUMBER FOR EMPLOYEE DEDUCTION DETAIL
    SELECTION CRITERIA USED: ALL PAYABLE SINCE 11/95


                  *******  MORE ON NEXT PAGE  *******
  (1) HELP   (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU  (6) SELECT  (11) EXIT
```

Press PF 6 to go to the Deduction Code/Deduction Group Selection List. This will allow you to look at a particular deduction taken for someone over a period of time.

```
PHIQ                DEDUCTION CODE/DEDUCTION GROUP SELECTION       B-2-S

  ENTER THE DEDUCTION(S) YOU WANT TO SEE FOR
 BLUTARSKY, SENATOR                  PERSON ID 000211111    SS# 388-88-8888

  DED CODE 414 OR GROUP CODE   ___        (IF YOU WANT TO SEE ALL DEDUCTIONS,
                                           THESE FIELDS SHOULD BE BLANK)


   SELECTION CRITERIA USED: ALL PAYABLE SINCE 11/01/95



  (1) HELP      (4) GOBACK     (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Deduction List

```
PHIQ                    EMPLOYEE DEDUCTION LIST      PAGE  1    B-2

 BLUTARSKY, SENATOR                 PERSON ID 000211111      SS# 388-88-8888

 NOV B CLASSIFIED          CALC ID 9512200  CHANGE ID        CURRENT
                                                  REASON
         DEDUCTION                         COMP AMT  NOT TAKEN   AMOUNT
 01 414    STATE GROUP LIFE INS                                  $18.00
                                       PAGE TOTAL TAKEN          $18.00

 DEC B CLASSIFIED          CALC ID 9512800  CHANGE ID        CURRENT
                                                  REASON
         DEDUCTION                         COMP AMT  NOT TAKEN   AMOUNT
 02 414    STATE GROUP LIFE INS                                  $18.00
                                       PAGE TOTAL TAKEN          $18.00

01  ENTER LINE NUMBER FOR EMPLOYEE DEDUCTION DETAIL
    SELECTION CRITERIA USED: ALL PAYABLE SINCE 11/01/95

                *******  MORE ON NEXT PAGE  *******
(1) HELP    (2) NEXT    (3) PREV    (4) GOBACK    (5) MENU    (6) SELECT    (11) EXIT
```

Employee Deduction Detail

```
PHIQ                        EMPLOYEE DEDUCTION DETAIL                  B-2-1

 DOE, JANE K                  PERSON ID 00021039      SS# 333-33-3333
 NOV B CLASSIFIED        CALC ID 9512200    CHANGE ID        CURRENT
 DEDUCTION 414    STATE GROUP LIFE INS              TAKEN 01/96 DED GROUP 025

       1    DEDUCTION AMOUNT - - - - - - -            18.00
       2    DEDUCTION TYPE - - - - - - - -             R
       3    NOT TAKEN REASON - - - - - - -
       4    EMPL BASIC INSURANCE COVERAGE            36000
       5    EMPL TOTAL LIFE INSUR COVERAGE           72000
       6    STATE SHARE AMOUNT - - - - - -            8.55
       7    STATE SHARE PERCENT  - - - - -           47.50
            PAYMENTS REMAINING - - - - - -               0
       8    PERIOD IDENTIFIER  - - - - - -         M199511
       9    PRE-TAX WAIVER IND - - - - - -
      10    TAXABLE FRINGE BENEFIT - - - -            0.00
      11    PRE-TAX AMOUNT (FED) - - - - -            7.44
            PRE-TAX AMOUNT (SOC SEC) - - -            7.44
            PRE-TAX AMOUNT (FICA)  - - - -            7.44
            PRE-TAX AMOUNT (STATE ) - - -             7.44

 (1) HELP   (2) NEXT    (3) PREV    (4) GOBACK    (5) MENU    (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

Employee Deduction Detail

ITEM	TITLE	DESCRIPTION
1	DEDUCTION AMOUNT	Identifies the dollar amount of actual deduction
2	DEDUCTION TYPE	R= Regular deduction taken each month A= Adjustment amount taken to catch up to normal ded.
3	NOT TAKEN REASON	** Insufficient net income *1 Previous entry with same ded code was ineligible %2 No eligible appointment type %3 No eligible bargaining unit %4 Invalid deduction amount %6 TA/PA appointment will be paid later in month %7 TAA/GAA monthly dues cap reached %A No eligible gross pay for computing deduction %C Not taken as result of Payroll History change %H No eligible hours for computing deduction %R No payment covered by retirement %% No eligible gross, ded. 431 NN Insufficient elig gross to first qualify for ded 431 NR All payments subject to retirement %W Insufficient W-2 gross for TSA's ZZ Basic State Group Life not taken or missing (prerequisite deduction) WW Waiver prevents State Group Life deduction
4	EMPL BASIC INS COVERAGE	Identifies the amount of the employee's Basic State group life insurance.
5	EMPL TOTAL LIFE INS COV	Identifies the amount of the total employee's State Group Life insurance. Additional coverage is totaled separately on that deduction (416-419) detail.
6	STATE SHARE AMOUNT	Amount of state share for this deduction
7	STATE SHARE PERCENT	Identifies the percent used to calculate the amount of state share for this deduction.
8	PERIOD IDENTIFIER	Identifies the deduction month for this deduction. M199511 = Nov 1995 deduction month Each multiple deduction taken in May for 9 mo staff is identified by a summer month, i.e. M199507, M199508
9	PRE-TAX WAIVER INDICATOR	Indicates if employee has waived pre-tax for this deduction.
10	TAXABLE FRINGE BEN	Identifies the amount of this deduction that is taxable, i.e. state group life insurance
11	PRE TAX AMT	Identifies the amount of the deduction that is taken pretax

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2Payroll History Inquiry (cont.)
Employee Deduction Detail
The following fields are found on the Deduction Detail for State Group Health Insurance.

```
PHIQ                       EMPLOYEE DEDUCTION DETAIL                    B-2-1
BLUTARSKY, SENATOR                   PERSON ID 000211111      SS# 388-88-8888
 NOV A CLASSIFIED        CALC ID 9511700    CHANGE ID          CURRENT
 DEDUCTION 4DB   GHC-SO CENTRAL WISC                 TAKEN 11/95  DED GROUP 020

      1      DEDUCTION AMOUNT - - - - - - -             0.00
      2      DEDUCTION TYPE - - - - - - - -                R
      3      NOT TAKEN REASON - - - - - - -
      4      STATE SHARE AMOUNT - - - - - -           183.92
      5      DOA PLAN CODE  - - - - - - - -            SY1A
      6      HEALTH SERVICE COUNTY - - - - -             13
      7      BARGAINING UNIT  - - - - - - -             11
      8      PAYMENTS REMAINING - - - - - -              0
      9      PERIOD IDENTIFIER  - - - - - -         M199511
     10      DOA VENDER CODE  - - - - - - -             35
     11      DOA COUNTY CODE  - - - - - - -
     12      PRE-TAX WAIVER IND - - - - - -
     13      TAXABLE FRINGE BENEFIT - - - -             0.00
     14      PRE-TAX AMOUNT (FED) - - - - -             0.00
             PRE-TAX AMOUNT (SOC SE ) - - -            0.00
             PRE-TAX AMTS -- (FICA)    0.00    (STATE)    0.00
 (1) HELP    (2) NEXT    (3) PREV    (4) GOBACK    (5) MENU    (11) EXIT
```

ITEM	TITLE	DESCRIPTION
1	**DEDUCTION AMOUNT**	Identifies the dollar amount of actual deduction
2	**DEDUCTION TYPE**	R= Regular deduction taken each month A= Adjustment amount taken to catch up to normal ded.
3	**NOT TAKEN REASON**	** Insufficient net income *1 Previous entry with same ded code was ineligible %2 No eligible appointment type %3 No eligible bargaining unit %4 Invalid deduction amount %A No eligible gross pay for computing deduction %C Not taken as result of Payroll History change %H No eligible hours for computing deduction %R No payment covered by retirement %% No eligible gross, ded. 431 NN Insufficient elig gross to first qualify for ded 431 NR All payments subject to retirement %W Insufficient W-2 gross for TSA's ZZ Basic State Group Life not taken or missing WW Waiver prevents State Group Life deduction

9.0   INQUIRY TRANSACTIONS

Employee Deduction Detail

ITEM	TITLE	DESCRIPTION
4	STATE SHARE AMOUNT	Amount of state share for this deduction
5	DOA PLAN CODE	Health Insurance coding consists of four digits : S = single F = family Y = zero cost Blank = actual dollar amount 1 = single 2 = family A = full state share B = less than half time rate C = employee pays all, no state share Blank = grad/short term plan
6	HEALTH SERVICE CO	This field shows the Health county that has been entered on W4EN.
7	BARGAINING UNIT	Identifies Bargaining Unit of employee
8	PAYMENTS REMAINING	Identifies number of payments remaining for those deductions requiring it, i.e. Early coverage Health, ERA
9	PERIOD IDENTIFIER	Identifies the deduction month for this deduction. M199511 = Nov 1995 deduction month Each multiple deduction taken in May for 9 mo staff is identified by a summer month, i.e. M199507, M199508
10	DOA VENDOR CODE	Identifies the Health insurance Carrier code
11	DOA CO CODE	This field is not used
12	PRE-TAX WAIVER INDICATOR	Indicates if employee has waived pre-tax for this deduction.
13	TAXABLE FRINGE BENEFIT	Identifies the amount of this deduction that is taxable, i.e. state group life insurance
14	PRE TAX AMOUNT	Identifies the amount of the deduction that is taken pre-tax.

9.0   INQUIRY TRANSACTIONS

Employee Inquiry
Enter PHIQ (space)

```
PHIQ               PAYROLL CALCULATION HISTORY INQUIRY


 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: B_

           A.   CALCULATION SCHEDULE INQUIRY

           B.   EMPLOYEE INQUIRY
                   PAYMENTS
                   DEDUCTIONS
                   PAYROLL DISBURSEMENTS
                   PERSONNEL TRANSACTIONS
                   APPOINTMENTS
                   CALCULATION INFO

           C.   PAYROLL DISBURSEMENT INQUIRY

           D.   DEDUCTION CONTROL INQUIRY




           (11) EXIT
```

Fast path entry is PHIQ (space) B

```
PHIQ                       EMPLOYEE INQUIRY                        B

        PERSON ID/SSN: _____

 SELECT ONE OF THE FOLLOWING INQUIRY TYPES: 3_
     1.   PAYMENTS
     2.   DEDUCTIONS
     3.   PAYROLL DISBURSEMENTS
     4.   PERSONNEL TRANSACTIONS
     5.   APPOINTMENTS
     6.   CALCULATION INFO

 ENTER CALC # _____    -OR- CHOOSE ONE OF THE FOLLOWING:
                          PAID MONTH        __ __        (MM YY)
                          EARNED MONTH      11 95        (MM YY)
                          PROCESSED SINCE   __ __ __     (MM DD YY)
                          PAYABLE SINCE     __ __ __     (MM DD YY)

                          SELECT A TYPE OF CALCULATION TO REVIEW: _
                     (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)

 (1) HELP       (4) GOBACK    (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Disbursement List
Fast path entry is PHIQ (space) B/SSN/3/CALC #

```
PHIQ                    EMPLOYEE DISBURSEMENT LIST      PAGE  1    B-3
                       (AS CALCED, DOES NOT REFLECT CHANGES)

 BLUTARSKY, SENATOR                  PERSON ID 00021111     SS# 388-88-8888

    CALC ID/DISB#   CHECK#  PAY DATE    DISTRIBUTION              AMOUNT
 01 9511700/007300          11/22/95 MADISON, UW CREDIT UNION      773.68
 02 9512300/007300          12/07/95 MADISON, UW CREDIT UNION      653.87

















    01   ENTER LINE NUMBER FOR EMPLOYEE DISBURSEMENT DETAIL
        SELECTION CRITERIA USED: ALL EARNED 11/95

                    *******  END OF LISTINGS  *******
 (1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

Employee Disbursement Detail

```
PHIQ                    EMPLOYEE DISBURSEMENT DETAIL              B-3-1


 BLUTARSKY, SENATOR            PERSON ID 00021000     SS# 388-88-8888
 NOV A CLASSIFIED              CALC ID 9511700        VOUCHER 00696

 CHECK #                       STATUS VALID DISBR
 DISBURSEMENT #   007300
 PAY DATE       11/22/95
 GROSS AMOUNT    $960.00
 NET AMOUNT      $773.68

 DISTRIBUTION   MADISON, UW CREDIT UNION
 E/S DIST       01 A5400
 UDDS           A540000



 (1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Inquiry
Enter PHIQ (space)

```
PHIQ                 PAYROLL CALCULATION HISTORY INQUIRY


 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: B_


         A.   CALCULATION SCHEDULE INQUIRY

         B.   EMPLOYEE INQUIRY
                  PAYMENTS
                  DEDUCTIONS
                  PAYROLL DISBURSEMENTS
                  PERSONNEL TRANSACTIONS
                  APPOINTMENTS
                  CALCULATION INFO

         C.   PAYROLL DISBURSEMENT INQUIRY

         D.   DEDUCTION CONTROL INQUIRY




             (11) EXIT
```

Fast path entry is PHIQ (space) B

```
PHIQ                        EMPLOYEE INQUIRY                        B

        PERSON ID/SSN: _____

 SELECT ONE OF THE FOLLOWING INQUIRY TYPES: 4_
     1.  PAYMENTS
     2.  DEDUCTIONS
     3.  PAYROLL DISBURSEMENTS
     4.  PERSONNEL TRANSACTIONS
     5.  APPOINTMENTS
     6.  CALCULATION INFO

 ENTER CALC # _____    -OR- CHOOSE ONE OF THE FOLLOWING:
                          PAID MONTH        __ __      (MM YY)
                          EARNED MONTH      11 95      (MM YY)
                          PROCESSED SINCE   __ __ __   (MM DD YY)
                          PAYABLE SINCE     __ __ __   (MM DD YY)

                          SELECT A TYPE OF CALCULATION TO REVIEW: _
                       (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)

 (1) HELP        (4) GOBACK    (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2Payroll History Inquiry (cont.)
Personnel Transactions List
Fast path entry is PHIQ (space) B/SSN/4/CALC #

```
PHIQ                   EMPLOYEE PERSONNEL TRANSACTIONS LIST   PAGE  1     B-4

 SMITH, JANE K                    PERSON ID 00020000       SS# 333-33-3333

     CALC ID   APPT ID      TRANSACTION                                 DATE
 01  9602900  000900000      31     RECLASSIFICATION                 01/08/96

     __    ENTER LINE NUMBER FOR EMPLOYEE TRANSACTION DETAIL

 SELECTION CRITERIA USED: ALL PAYABLE SINCE 01/01/96
                  *******  END OF LISTINGS  *******
 (1) HELP   (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

Employee Personnel Transactions Detail

```
PHIQ                   EMPLOYEE PERSONNEL TRANSACTIONS DETAIL           B-4-1
 SMITH, JANE K                   PERSON ID 00020000    SS# 333-33-3333
 FEB B CLASSIFIED                              CALC ID 9602900

 APPT ID 00090000
 TRANSACTION 31     RECLASSIFICATION
 EFFECTIVE      01/08/96
 ANTICIPATED END
 EXPLANATION

 (1) HELP    (2) NEXT    (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

Employee Inquiry
Enter PHIQ (space)

```
PHIQ                    PAYROLL CALCULATION HISTORY INQUIRY


 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: B_


           A.   CALCULATION SCHEDULE INQUIRY


           B.   EMPLOYEE INQUIRY
                    PAYMENTS
                    DEDUCTIONS
                    PAYROLL DISBURSEMENTS
                    PERSONNEL TRANSACTIONS
                    APPOINTMENTS
                    CALCULATION INFO


           C.   PAYROLL DISBURSEMENT INQUIRY


           D.   DEDUCTION CONTROL INQUIRY


                (11) EXIT

```

Fast path entry is PHIQ (space) B

```
PHIQ                        EMPLOYEE INQUIRY                        B


      PERSON ID/SSN:  _____


 SELECT ONE OF THE FOLLOWING INQUIRY TYPES: 5_
      1.  PAYMENTS
      2.  DEDUCTIONS
      3.  PAYROLL DISBURSEMENTS
      4.  PERSONNEL TRANSACTIONS
      5.  APPOINTMENTS
      6.  CALCULATION INFO


 ENTER CALC # _____    -OR- CHOOSE ONE OF THE FOLLOWING:
                           PAID MONTH          __ __      (MM YY)
                           EARNED MONTH        11 95      (MM YY)
                           PROCESSED SINCE     __ __ __   (MM DD YY)
                           PAYABLE SINCE       __ __ __   (MM DD YY)


                        SELECT A TYPE OF CALCULATION TO REVIEW: _
                    (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)




 (1) HELP       (4) GOBACK    (5) MENU   (11) EXIT

```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Appointment List
Fast path entry is PHIQ (space) B/SSN/5/CALC #

```
PHIQ                      EMPLOYEE APPOINTMENT LIST          PAGE  1      B-5

 BLUTARSKY, SENATOR                   PERSON ID 00021111   SS# 388-88-8888

   CALC ID  APPT ID         TITLE              TYPE  BASIS     RATE
01 9511700 00092000     DIETITIAN 1             CP    H      $12.000




     * * WARNING * *  THIS INFORMATION MAY BE OBSOLETE OR INCOMPLETE
         USE "APPR" TO SEE CORRECT AND CURRENT INFORMATION

    01_   ENTER LINE NUMBER FOR EMPLOYEE APPOINTMENT DETAIL

 SELECTION CRITERIA USED: ALL EARNED 11/95
                  ******* END OF LISTINGS *******
 (1) HELP  (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (6) SELECT   (11) EXIT
```

Employee Appointment Detail

```
PHIQ                    EMPLOYEE APPOINTMENT DETAIL              B-5-1

 BLUTARSKY, SENATOR                PERSON ID 00021111    SS# 388-88-8888
 NOV A CLASSIFIED                  CALC ID 9511700  CHANGE ID

 APPT ID 00090000  TITLE 21000        DIETITIAN
     TYPE CP                              CONTINUITY  01
     BEGIN         REASON                 FLSA
     BASIS     H HOURLY                   UC WAGE REPORTED Y
     RATE      $12.000    OVER MAX        PAY CATEGORY
     APPT %    100.0                      FIN AID
     PROB TYPE                            SEASONAL
     BARG UNIT  11 UNION LOCAL            EXEC PAY
     RETR       4                         AFFILIATION
     FED RETR                             SERV STAT
     FED APPT                             SERV FUNC
     EMP COUNTY 13                        FRINGE ELIG
     RECRUIT #                            FUND RESP
     PAY STATUS A              PAY STATUS BEGIN        END
      * * WARNING * *  THIS INFORMATION MAY BE OBSOLETE OR INCOMPLETE
          USE "APPI" TO SEE CORRECT AND CURRENT INFORMATION


 (1) HELP   (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Inquiry
Enter PHIQ (space)

```
PHIQ                PAYROLL CALCULATION HISTORY INQUIRY

 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: B

          A.   CALCULATION SCHEDULE INQUIRY

          B.   EMPLOYEE INQUIRY
                  PAYMENTS
                  DEDUCTIONS
                  PAYROLL DISBURSEMENTS
                  PERSONNEL TRANSACTIONS
                  APPOINTMENTS
                  CALCULATION INFO

          C.   PAYROLL DISBURSEMENT INQUIRY

          D.   DEDUCTION CONTROL INQUIRY




               (11) EXIT
```

Fast path entry is PHIQ (space) B

```
PHIQ                       EMPLOYEE INQUIRY                        B

        PERSON ID/SSN: _____

 SELECT ONE OF THE FOLLOWING INQUIRY TYPES: 6
      1.   PAYMENTS
      2.   DEDUCTIONS
      3.   PAYROLL DISBURSEMENTS
      4.   PERSONNEL TRANSACTIONS
      5.   APPOINTMENTS
      6.   CALCULATION INFO

 ENTER CALC # _____     -OR- CHOOSE ONE OF THE FOLLOWING:
                           PAID MONTH        __ __      (MM YY)
                           EARNED MONTH      11 95      (MM YY)
                           PROCESSED SINCE   __ __ __   (MM DD YY)
                           PAYABLE SINCE     __ __ __   (MM DD YY)

                     SELECT A TYPE OF CALCULATION TO REVIEW: _
                 (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)

(1) HELP       (4) GOBACK    (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Employee Calculation Info
Fast path entry is PHIQ (space) B/SSN/6/CALC #

```
PHIQ                       LIST OF CALCS FOR EMPLOYEE     PAGE  1     B-6

 BLUTARSKY, SENATOR                     PERSON ID 00021111    SS# 388-88-8888

     CALC ID        CALC DESCRIPTION
 01  199511700   NOV A CLASSIFIED
 02  199512300   NOV B CLASSIFIED




 

   _01   ENTER THE LINE NUMBER IF YOU WANT TO SEE INFORMATION
       ABOUT THE EMPLOYEE AT THE TIME OF THE CALC
   SELECTION CRITERIA USED: ALL EARNED 11/95
             *******  END OF LISTINGS  *******
 (1) HELP    (2) NEXT    (3) PREV    (4) GOBACK    (5) MENU    (11) EXIT
```

Employee Information

This screen will give you YTD amounts prior to the calculation identified.

```
PHIQ              OTHER INFORMATION ABOUT THE EMPLOYEE              B-6-1
                         AT THE TIME OF THE CALC

 BLUTARSKY, SENATOR                     PERSON ID 00021111    SS# 388-88-8888
 NOV A CLASSIFIED                   CALC ID 9511700

   RETR    4                            BIRTHDATE        08/25/50
   SS/FICA Y SOC SEC                    RES COUNTY       13
   BANK    MADISON, UW CREDIT UNION     SENIORITY (ADJ)  12/01/72
   CHECK DISTRIB PREF                   RETURNING SWITCH

                   THE FOLLOWING YTD TOTALS ARE PRIOR TO THIS CALC
         TOTAL GROSS YTD             $21000.84
         FED TAXABLE GROSS YTD       $20709.43
         STATE TAXABLE GROSS YTD     $20709.43
         SOC SEC GROSS YTD           $20809.43
         FICA GROSS YTD
         EIC GROSS YTD                   $0.00
         WRS GROSS YTD               $21000.84




 (1) HELP    (2) NEXT    (3) PREV    (4) GOBACK    (5) MENU    (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2Payroll History Inquiry (cont.)
Payroll Disbursement Inquiry
Enter PHIQ (space)

```
PHIQ                    PAYROLL CALCULATION HISTORY INQUIRY

 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: C_

            A.   CALCULATION SCHEDULE INQUIRY

            B.   EMPLOYEE INQUIRY
                    PAYMENTS
                    DEDUCTIONS
                    PAYROLL DISBURSEMENTS
                    PERSONNEL TRANSACTIONS
                    APPOINTMENTS
                    CALCULATION INFO

            C.   PAYROLL DISBURSEMENT INQUIRY

            D.   DEDUCTION CONTROL INQUIRY




                                                    (11) EXIT
```

Fast path entry is PHIQ (space) C

```
PHIQ                    PAYROLL DISBURSEMENT INQUIRY                C

 ENTER CALC # 9512300




                              SELECT A TYPE OF CALCULATION TO REVIEW: _
                              (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED,
                              BLANK = ALL)

 ENTER THE RANGE OF DISBURSEMENT NUMBERS:
         FROM _____   THRU _____   (IF YOU WANT TO SEE ALL,
                                        THESE FIELDS SHOULD BE BLANK)


 (1) HELP       (4) GOBACK    (5) MENU   (11) EXIT
```

9.0   INQUIRY TRANSACTIONS

9.11   PAYROLL INQUIRIES (cont.)
9.11.2 Payroll History Inquiry (cont.)
Payroll Disbursement Inquiry List
Fast path entry is PHIQ (space) C/CALC #

```
PHIQ                   PAYROLL DISBURSEMENT INQUIRY LIST            C-1

  NOV B CLASSIFIED         CALC ID 9512300  VOUCHER 00699  PAY DATE 12/07/95

     CHECK #  DISB #      PAYABLE TO          DISTRIBUTION           AMOUNT
   1 F2587429    14   BLUTARSKY, SENATOR    MADISON, M&I BANK SUPP   465.19

     01   ENTER LINE NUMBER FOR INDIVIDUAL DISBURSEMENT DETAIL

  SELECTION CRITERIA USED: CALC NUMBER 9512300
                  *******  MORE ON NEXT PAGE  *******
  (1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

Payroll Disbursement Detail

```
PHIQ                   PAYROLL DISBURSEMENT DETAIL                  C-1-1

NOV B CLASSIFIED                 CALC ID 9512300        VOUCHER 00699

CHECK #        F2587429          CHECK TYPE E EMPLOYEE
DISBURSEMENT #    9              STATUS    VALID DISBRS
PAY DATE       12/07/95

PAYABLE TO     BLUTARSKY, SENATOR        PERSON ID     00211111
GROSS AMOUNT        $535.95              SS#            388-88-8888
PAYABLE AMOUNT      $455.98              DEDUCTION CODE

DISTRIBUTION     CAMBRIDGE, M & I BANK
E/S DISTRIBUTION 26 A540600
UDDS             A540600




(1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.2Payroll History Inquiry (cont.)
Deduction Control Total Inquiry
Enter PHIQ (space)

```
PHIQ                PAYROLL CALCULATION HISTORY INQUIRY

 ENTER THE LETTER CORRESPONDING TO THE FUNCTION YOU WISH TO PERFORM: D_

          A.   CALCULATION SCHEDULE INQUIRY

          B.   EMPLOYEE INQUIRY
                 PAYMENTS
                 DEDUCTIONS
                 PAYROLL DISBURSEMENTS
                 PERSONNEL TRANSACTIONS
                 APPOINTMENTS
                 CALCULATION INFO

          C.   PAYROLL DISBURSEMENT INQUIRY

          D.   DEDUCTION CONTROL INQUIRY




                                                          (11) EXIT
```

Fast path entry is PHIQ (space) D

```
PHIQ                DEDUCTION CONTROL TOTAL INQUIRY               D

   ENTER CALC # _____    -OR- CHOOSE ONE OF THE FOLLOWING:
                                 PAID MONTH      __ __      (MM YY)
                                 EARNED MONTH    11 95      (MM YY)
                                 PROCESSED SINCE __ __ __   (MM DD YY)
                                 PAYABLE SINCE   __ __ __   (MM DD YY)

                         SELECT A TYPE OF CALCULATION TO REVIEW: _
                   (C=CLASSIFIED, S=STUDENT, U=UNCLASSIFIED, BLANK = ALL)



      ENTER DEDUCTION CODE ___  OR GROUP CODE ____
      (ONLY IF YOU DO NOT WANT TO LOOK AT ALL DEDUCTIONS)



  (1) HELP        (4) GOBACK    (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.2Payroll History Inquiry (cont.)
Deduction Control Totals Inquiry List
Fast path entry is PHIQ (space) D/CALC #

```
PHIQ                   DEDUCTION CONTROL TOTALS INQUIRY LIST          D-1
                            (TOTALS REFLECT CHANGES)

 NOV A STUDENT                       CALC ID 9511600

    DED CODE      DEDUCTION NAME        COUNT   EMPLOYEE TOTAL  STATE TOTAL
 01  A68     FEDERAL TAX - 1042S          0          $0.00         $0.00
 02  A69     FEDERAL TAX - 1042S          0          $0.00         $0.00
 03  A71     FEDERAL TAX - 1042S          0          $0.00         $0.00
 04  A72     FEDERAL TAX - 1042S          0          $0.00         $0.00
 05  A73     FEDERAL TAX - 1042S          0          $0.00         $0.00
 06  A74     FEDERAL TAX - 1042S          0          $0.00         $0.00
 07  A75     FEDERAL TAX - 1042S          0          $0.00         $0.00
 08  A76     FEDERAL TAX - 1042S          0          $0.00         $0.00
 09  A77     FEDERAL TAX - 1042S          0          $0.00         $0.00
 10  A78     FEDERAL TAX - 1042S          0          $0.00         $0.00
 11  A79     FEDERAL TAX - 1042S          0          $0.00         $0.00
 12  B01     WISCONSIN TAX             7621      $19421.30         $0.00
 13  B02     WISCONSIN TAX               71        $450.00         $0.00


 ___   ENTER LINE NUMBER FOR DEDUCTION DETAIL
 SELECTION CRITERIA USED: ALL EARNED 11/95
                    *******  MORE ON NEXT PAGE  *******
```

Deduction Control Total Detail

```
PHIQ                   DEDUCTION CONTROL TOTAL DETAIL            D-1-1

 NOV A CLASSIFIED            CALC ID 9511700

   DEDUCTION CODE 4AO    STANDARD

   EMPLOYEE TOTAL:      $10360.89  CORRECTED EMPLOYEE TOTAL:      $100.32-
   STATE SHARE TOTAL:   $24054.37  CORRECTED STATE SHARE TOTAL:   $193.12-
   EMPLOYER TOTAL:         $0.00   CORRECTED EMPLOYER TOTAL:        $0.00

   TAKEN COUNT:       79

   DEFERRED ACCOUNT   3006

   GROUP CODE 020
   ORDER CODE 070

   REPORT PERIOD

(1) HELP    (2) NEXT   (3) PREV   (4) GOBACK   (5) MENU   (11) EXIT
```

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)

9.11.3 Payroll Master Inquiry

This screen is a summary of specific pay type data from PMAS and can be used to look at pay type data entered for the current and upcoming payroll calculation.

Enter PMEI (space)

```
PAYROLL PAYMENT ENTRY INQUIRY

           TYPE IN ALL OR SOME OF THE FOLLOWING:

    1     PROCESSING TYPE                  (SEQ, RES, OR RAN)
    2     SECTION CODE
    3     PEG:
              UDDS
              COST CENTER
              AUX. ACCOUNT

    4     SOCIAL SECURITY                  (RANDOM PROCESSING ONLY)
    5     RESTART LAST NAME                (RESTART PROCESSING ONLY)

          (11) /EXIT
```

ITEM	TITLE	DESCRIPTION
1	PROCESSING TYPE	Must be SEQ, RES, or RAN. SEQ = Sequential Processing will list a sequence of employees in the specified Section/PEG. RES = Restart Sequential Processing will list employees in the specified Section/Peg starting with the name you have indicated. RAN = Random Processing will display a specific employee within the given Section/PEG.
2	SECTION CODE	Payroll section is the code assigned to your group. (Example: Section PF)
3	PEG	The payroll entry group (PEG) is the code assigned to your group.
4	SOCIAL SECURITY	Employee's social security number . Use only for Processing Type = RAN.
5	RESTART LAST NAME	Restart Last Name. Use only for Processing Type = RES. Enter up to 5 letters of an employee's last name.
	ENTER	After selection is made, press enter to go to detail inquiry screen.

9.0   INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.3Payroll Master Inquiry (cont.)
Payroll Master Detail Inquiry
Fast Path Entry is one of the following:
PMEI (space) SEQ(SectionPeg)
PMEI (space) RAN(SectionPeg)/SSN
PMEI (space) RES(SectionPeg)/Name

```
PMEI  1    SECTION: PF    PEG: F                 STATUS OF SEC: A   PEG: A
     2                3              4              5
 NAME            SSN/SPLIT       PAY TYPES    HOURS/AMOUNTS
 REICHENBERGER,  396746725       BS              80.0/
 REPENSHEK, LIND 391469888       HR               0.0/
 ROGERS, ROY     697322725       BS              40.0/
                 02              BS              40.0/
 STUCKEY JR, WIL 136333333       BS              40.0/
                 02              BS              40.0/
 WEBER, DONNA J  275664441       BS              40.0/
                 02              BS              40.0/
 WEINER, MICHELL 396945307       BS              80.0/


                     6
 (1) NEXT   (2) PREV   (3) MENU   (4) PMAS   (11) /EXIT
```

ITEM	TITLE	DESCRIPTION
1	SECTION/PEG	Displays the current Section/PEG requested and the processing status.
2	NAME	Displays list of employees in Section/PEG
3	SSN/SPLIT	Employee's SSN will be displayed for the first pay split. Each additional pay split is identified by a sequence number.
4	PAY TYPES	Displays employee's pay types in this Section/PEG. BS = base hours.
5	HOURS/ AMOUNTS	Displays employee's total hours or dollar amount.
6	FUNCTION KEYS	Press pf 1 (NEXT) and pf 2 (PREV) to move forward and backward between screens. If there are no more screens when pf 1 is pressed, you will be returned to the menu screen. Pressing pf 3 (MENU) will also display the menu screen. Pressing pf 4 (PMAS) allows you to switch to PMAS to make changes in pay split records. You cannot switch back to PMEI from the PMAS screen.
	NEXT PERSON ID (on random processing detail screen	The pf 1 and pf 2 keys do not work in the random processing detail screen. You must enter the employee's SSN in the NEXT PERSON ID field.

9.0 INQUIRY TRANSACTIONS

9.11 PAYROLL INQUIRIES (cont.)
9.11.3 Payroll Master Inquiry (cont.)
Payroll Split Inquiry

This screen shows all payroll splits for an employee that are currently on the Payroll Master file as of the date you perform this inquiry.

Enter PMSI (space) SSN

```
1 388 88 8888  BLUTARSKY, SENATOR                 00050341   FTE 1.000000 BANK

SECTION 21  PEG A54                SCHOOL OF NURSING
2   TITLE                 MODIFIER          APPT ID     CLASS     CERT
                              BS HRS    REG   HRS    TAX  SS
3 UDDS    FND-A-ACCT   RATE     GROSS    WK1    WK2    ABL  TAX STATUS PERIOD
                                                                 4
DIETITIAN 1          PERMANENT              00056763    21
 A544000   144-2-C133 H   7.966       80.0               Y    Y   ACTIVE
DIETITIAN 1          LTE                    00056764    22       09-042798
 A541500   144-2-C133 H   6.235                          Y    Y   ACTIVE




                                           ...        ...        ...
                                           SIGNON    SIGNOFF    AVAL
                                     5     =-1         =1        =+0
                                           /RELEASE  /EXIT     ...
```

ITEM	TITLE	DESCRIPTION
1	**SSN/NAME/FTE**	Displays the SSN, Name and FTE of employee requested.
2	**TITLE/APPT ID/CLASS/CERT**	Displays the Title, Appointment ID and 2 digit class code for each appointment paid. Cert field indicates LTE type and anniversary date.
3	**UDDS/FUND/ RATE/GROSS**	Displays the UDDS, funding, hourly rate or gross amount to be paid.
4	**STATUS**	ACTIVE = Pay split has been calc'd. ACTV = New pay split LOA = On Leave of Absence C = C Basis pay split during Summer
5	**FUNCTION KEYS**	Press pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.12   PERSON INQUIRY

This screen shows the same information as the INQY inquiry screen plus addresses, FTE, VISA, W-4 date, and Employed County.

Enter PEIQ (space) SSN

```
1  388 88 8888  BLUTARSKY, SENATOR                    PERSON ID: 00050341
 TITLE:  37201    DIETITIAN 1
 DOB: 02 02 1945 SEX: F MARITAL: S VISA: 1 RET: 4 LIFE INS WAIVER:
 BARG-UNIT: 11 PATIENT CARE              SENIORITY ADJ CONT:
 W-4 DATE: 04 04 94 EMPLOYED COUNTY: DANE           FTE: 1.000000
 BANK NAME: NO BANK CODE ON FILE                EMPLM STATUS: P
 SECTION PAID: 21   LAST DATE PAID: 05 11 95    WORK AUTH EXP: 12 20 1995
2  HOME ADDRESS                         CAMPUS ADDRESS
 1234 ANYWHERE ST                       UDDS: A 54 4000
 MAD CITY, WI                           BLDG: 0776   FAMILY PRACTICE VERONA
                                        ROOM: 30
 ZIP: 54734  PHONE: ( 608 ) 262 2222   PHONES: ( 608 ) 262 0000  608  262 0001


3  FEDERAL INCOME INFO          STATE INCOME INFO       TAX STATUS: S
 NO OF EXEM: 02 ADDL $:       NO OF EXEM: 02  ADDL $:
 MTD FED GROSS:    637.28  MTD STATE GROSS:    637.28 YTD SS GR:        .00
 MTD FED DED:       52.50  MTD STATE DED:       28.40 YTD SS DED:   2031.11
 YTD FED GROSS:  44457.69  YTD STATE GROSS:  44457.69 YTD EX SS:        .00
 YTD FED DED:    21262.30  YTD STATE DED:     2699.50 YTD RET GR   46251.04
 TOTAL YTD EARNING:  46251.04  BASE HRS:  80.0   ....     ....    ....
 INCOME CODE 15:        .00                    SIGNON   SIGNOFF AVAL
 INCOME CODE 18:        .00                    =-1      =1      =+0
 INCOME CODE 19:        .00                    /RELEASE /EXIT   ....
```

ITEM	TITLE	DESCRIPTION
1	**PERSON DATA**	Displays Employee Name, SSN, title, birthdate, gender, B.U., Adjusted Seniority Date, FTE & other person data.
2	**ADDRESS**	Displays latest home address and campus address.
3	**TAX INFO**	Displays Tax information, including year to date and month to date.

9.0   INQUIRY TRANSACTIONS

9.12   PERSON INQUIRY (cont.)
Payroll Tax Calculation Inquiry

PYDC can be used to estimate the amount of federal, state and social security taxes for an employee when one or more of the variables are changed. The transaction does not make any data changes; it only computes what effect the changes would have.

Enter PYDC (space) or PYDC (space) SSN if employee is on payroll.

```
                    PAYROLL DEDUCTION CALCULATION

1 SSN 388888888          NAME DUKE, RAOUL

2  GROSS PAY              PAYMENT TYPE (B/M)

 TDA AMOUNT      0.00

 FEDERAL TAX STATUS S  NO OF EX 01  ADD'L $  0.0
3
 STATE TAX STATUS S     NO OF EX 01  ADD'L $  0.0

4 TAXABLE FRINGE BENEFIT _____   (INCREASES TAXABLE GROSS AMOUNTS)

 POTENTIAL SECTION 125 DEFERRALS (MAY REDUCE TAXABLE GROSS AMOUNTS):
   PRE-TAX LIFE INS   17.00 _____     ERA MEDICAL ACCT    15.00 _____
5  PRE-TAX HLTH INS   11.30 _____     ERA DEP CARE ACCT    0.00 _____
   PRE-TAX TRANS      30.00 _____
7 FED TAX W/H          STATE TAX W/H          NET PAY

6 SOCIAL SECURITY YES   SOC SEC AMOUNT               ....   ....   ....
                                                     ....   ....   ....
8 NEXT SSN             PAY DATE 12 06 95             ....   ....   ....
                                                     ....    /EXIT  ....
```

Payroll Tax Calculation Inquiry

ITEM	TITLE	DESCRIPTION
1	**SSN/NAME**	If you use SSN to enter this screen, employee's name and SSN will appear. Otherwise you can enter on the screen.
2	**GROSS PAY PAYMENT TYPE**	Enter the gross pay and indicate B for biweekly or M for monthly. This amount can be found on PHIQ
3	**FEDERAL/ STATE TAX STATUS**	If you use SSN to enter this screen, the employee's current withholding info will be brought in. You can enter or change this data. See W4 Inquiry for instructions on entering or changing exemptions.
4	**TAXABLE FRINGE BENEFIT**	If employee has life insurance that increases his taxable gross, enter the amount here. See Payroll History (Detail screen for State Group Life) (Pg 53)

9.0   INQUIRY TRANSACTIONS

9.12   PERSON INQUIRY (cont.)
Payroll Tax Calculation Inquiry

ITEM	TITLE	DESCRIPTION
5	**POTENTIAL DEFERRALS**	If you use SSN to enter this screen, the employee's current deduction amounts will be displayed. You can enter or change this data.
	PRE-TAX LIFE	Pretax Life is the actual amount of the premium, not necessarily the pre-tax amount. Refer to Payroll History detail screen for SGL (see page 53) for the actual pre-tax (or taxable) amount.
	PRE-TAX HEALTH	Pre-Tax Health includes both State Group Health and Major Medical premium.
	PRE-TAX TRANS	Pre-Tax Transportation includes parking, van-pool and bus passes.
	ERA	ERA dependent care & medical deductions are displayed here
6	**SOCIAL SECURITY**	If you use SSN to enter this screen, the employee's Social Security status (yes or no) will be displayed. You can enter or change this data. (Y or N)
	ENTER	When selections have been made, press enter. A new screen will display the calculated amounts withheld and net pay. You can re-enter new amounts for comparison.
7	**FED/STATE WH SS /NET PAY**	Federal & state withholding, social security amounts and resulting net pay will be displayed based on SSN entered and selections made. Any Health, Life or ERA amount will need to be deducted from Net Pay yet.
8	**NEXT SSN**	Enter SSN of next employee to calculate tax. OR press F 11 to exit this transaction.

9.0   INQUIRY TRANSACTIONS

9.13   TAX INQUIRIES

9.13.1 Tax Treaty Table Inquiry

This inquiry displays the countries that have a tax treaty in affect. This Tax Treaty Table is used by the calculation process when determining whether or not to tax a foreign person who is being payrolled. This table is updated by UWPC as soon as there is a new tax treaty or a change to an existing tax treaty. For Independent personal services coverage, please check IRS Pub 901.

Enter ITAXI (space)

```
PYTAXM01            VIEW INTERNATIONAL TAX TREATY TABLE            07/19/96
 1 Start: ARAB REP OF EGYPT____                                    11:01 AM
                    Country                    Exemption      Exemption
        Country       Code    Employee Type    Time Limit   Dollar Limit
       -------------------- 2 --- -------3----------- -------4------ 4 -------
ARAB REP OF EGYPT    415  (15) Fellow/Scholarship   5 yrs __ mos _____
                          (18) Teaching/Research    2 yrs __ mos _____
                          (19) Studying/Training    5 yrs __ mos   3,000.00

ARMENIA              418  (15) Fellow/Scholarship   2 yrs __ mos _____
                          (18) Teaching/Research    2 yrs  4 mos _____
                          (19) Studying/Training    2 yrs  8 mos _____

AUSTRALIA            420  (15) Fellow/Scholarship   6 yrs __ mos _____
                          (18) Teaching/Research    2 yrs __ mos _____
                          (19) Studying/Training    __ yrs  4 mos _____

AUSTRIA              424  (15) Fellow/Scholarship   __ yrs __ mos _____
                          (18) Teaching/Research    2 yrs __ mos _____
                          (19) Studying/Training    __ yrs __ mos   4,000.00

Enter-PF1---PF2--PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     HELP                                  PREV  NEXT      5         EXIT
```

ITEM	TITLE	DESCRIPTION
1	START	Enter the country you wish to view.
2	COUNTRY CODE	Identifies the Country Code.
3	EMPLOYEE TYPE	Displays the Employee Type which is in the country's tax treaty. 15 = Fellow/Scholarship 18 = Teaching/Research 19 = Studying/Training
4	EXEMPTION TIME LIMIT/ DOLLAR LIMIT	Displays the applicable time limit and/or dollar limit in the tax treaty.
5	FUNCTION KEYS	Press pf 7 to view previous screen. Press pf 8 to view next screen Press pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.13   TAX INQUIRIES (cont.)

9.13.2 Tax Work Table Inquiry

This inquiry displays the W2, 1042, or 1099 amounts for an employee for the past three calendar years.

Enter TXIQ (space)

```
PYTXM301                       INQUIRY MENU                    02/04/98
PYTX300                       TAX WORK TABLES                  08:29:02




              EMPLOYEE SSN OR PERSON ID: _____ 1


              TAX YEAR: ____ 2





_____
ENTER PERSON ID OR SSN AND TAX YEAR THEN PRESS A PF KEY
ENTER  PF1 - PF2 - PF3 - PF4 - PF5 - PF6 - PF7 - PF8 - PF9 - PF10 - PF11 -PF12
       HELP                      3               WKW2  WK42  WK99        EXIT
```

ITEM	TITLE	DESCRIPTION
1	**EMPLOYEE SSN OR PERSON ID**	Enter employee's SSN or person id.
2	**TAX YEAR**	Enter tax year you wish to access and then press one of the function keys listed below.
3	**FUNCTION KEYS**	Pf 7 to view W2 amounts for the calendar year requested. Pf 8 to view 1042 amounts for the calendar year requested. Pf 9 to view 1099 amounts for the calendar year requested. Pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.13   TAX INQUIRIES (cont.)

9.13.3 Inquiry to Tax Information
TXIQ (W-2)
Press PF 7 from the Main Menu.

```
PYTXM310                       INQUIRY                        01/10/97
PYTXP310                     W2 WORK TABLE                    08:38:27
                           TAX YEAR: 1997      30
NAME: SMITH, SUSAN C              PERSON ID:  001999999   SSN: 281924465
REGULAR FEDERAL WAGES  4377.60    1     DEFERRED COMP                  16
TOTAL FEDERAL GROSS    4394.33    2     WIS RETIREMENT IND       N     17
FEDERAL TAX WITHHELD    496.50    3     TERM LIFE INSURANCE            18
REGULAR STATE WAGES    4377.60    4     MEALS AMOUNT          16.73    19
TOTAL STATE GROSS      4394.33    5     MOVING EXPENSE - N/Q           20
STATE TAX WITHHELD      141.20    6     VEHICLE ALLOWANCE              21
SOCIAL SECURITY GROSS  4377.60    7     NUMBER OF MILES                22
SOCIAL SECURITY TAX     271.41    8     EIC PAYMENT                    23
MEDICARE GROSS         4377.60    9     EDUCATION ASSISTANCE           24
MEDICARE TAX            63.48    10     PRETAX LIFE                    25
FEDERAL FICA GROSS              11     PRETAX HEALTH          3.72    26
FEDERAL FICA TAX               12     ERA MEDICAL                    27
STUDENT FICA GROSS             13     ERA DEPENDENT CARE             28
STUDENT FICA TAX               14     TSA AMOUNT                     29
MOVING EXPENSE - Q             15
TYPE IN A NEW YEAR AND PRESS ENTER OR PRESS A PF KEY
ENTER PF1 - PF2 - PF3 - PF4 - PF5 - PF6 - PF7 - PF8 - PF9 - PF10 - PF11 - PF12
   31    NEXT  PREV      MENU                  WK42  WK99         EXIT
```

Below is an example of a W-2.

a Control number			Copy B To Be Filed With Employee's FEDERAL Tax Return This information is being furnished to the Internal Revenue Service.	
b Employer's identification number **39-6006492**			**1** Wages, tips, other compensation **110,231.17**	**2** Federal income tax withheld **32,322.00**
c Employer's name, address, and ZIP code **UNIVERSITY OF WISCONSIN SYSTEM** **750 UNIVERSITY AVE RM 49** **MADISON, WI 53706-1490**			**3** Social security wages **62,700.00**	**4** Social security tax withheld **3,887.40**
			5 Medicare wages and tips **120,277.37**	**6** Medicare tax withheld **1,744.02**
			7 Social security tips	**8** Allocated tips
d Employee's social security number **123-45-6789**			**9** Advance EIC payment **0.00**	**10** Dependent care benefits **3,100.00**
e Employee's name, address, and ZIP code **SAMPLE, AMY S** **15 TEMPORARY LANE** **MIDTOWN WI 53703**			**11** Nonqualified plans	**12** Benefits included in Box 1 **45.80 Meals**
			13 See Instrs. for Box 13 C 244.22 E 9,492.00 G 500.00 P 2,110.00	**14** Other **529.32 Pre tax** **600.00 Move Exp** **900.00 Vehicle** **100.00 Ed/Asst**
			15 Statutory Deceased Pension Legal 942 Subtotal Deferred employee plan rep. emp. compensation ☐ ☐ ☒ ☐ ☐ ☐ ☒	
16 State Employer's state I.D. No. **WI	020608-6**	17 State wages, tips, etc. **110,331.17**	18 State income tax **7,722.60**	19 Locality name 20 Local wages, tips, etc.	21 Local income tax

OMB No. 1545-0008

9.0   INQUIRY TRANSACTIONS

The information in TXIQ is loaded from Payroll History each calendar year in approximately mid-January. This calendar year information is retained for three calendar years.

ITEM	TITLE	DESCRIPTION	FIELD ON W2
1	REGULAR FEDERAL WAGES	Amount of taxable wages, tips, or other compensation after reductions for contributions made to TSA, ERA, pretax health, pretax life and adding taxable life, if applicable.	BOX 1
2	TOTAL FEDERAL GROSS	Amount from #1 above plus any miscellaneous fringe benefits paid to the employee such as vehicle allowance, meals, awards, moving, etc.	BOX 1
3	FEDERAL TAX WITHHELD	Amount of Federal tax withheld on the amount in Item #1 above.	BOX 2
4	REGULAR STATE WAGES	Amount of taxable wages, tips, or other compensation after reductions for contributions made to TSA, ERA, pretax health, pretax life and/or adding taxable life.	BOX 17
5	TOTAL STATE GROSS	Amount from #3 above plus any miscellaneous fringe benefits paid to the employee such as vehicle allowance, meals, awards, moving, etc.	BOX 17
6	STATE TAX WITHHELD	Amount of state tax withheld on the amount in #4 above.	BOX 18
7	SOCIAL SECURITY GROSS	Wages subject to Social Security Tax up to a maximum each calendar year. **Note:** This figure includes wages paid to UW Madison Medical School doctors that are also paid by the UW Medical Foundation.	BOX 3
8	SOCIAL SECURITY TAX	Social Security Tax collected based on the amount in #7 above. 1998 Rate = 6.2%.	BOX 4
9	MEDICARE GROSS	Wages subject to Medicare Tax. Medicare Tax is applied to all wages, there is no maximum.	BOX 5
10	MEDICARE TAX	Medicare Tax withheld based on the amount in #7. 1998 Rate = 1.45%.	BOX 6
11	FEDERAL FICA GROSS	Wages subject to Medicare Tax. Applies only to Extension employees who have a Federal appointment.	BOX 5
12	FEDERAL FICA TAX	Medicare Tax withheld based on the amount in #11. 1998 Rate = 1.45%. Applies only to Extension employees who have a Federal appointment.	BOX 6

9.0   INQUIRY TRANSACTIONS

ITEM	TITLE	DESCRIPTION	FIELD ON W2
13	**STUDENT FICA GROSS**	Not used.	NA
14	**STUDENT FICA TAX**	Not used.	NA
15	**MOVING EXPENSE - Q**	Amount of moving expense reimbursement that is NOT taxable.	BOX 13 Item P
16	**DEFERRED COMP**	Amount of contributions made to a Deferred Compensation plan (457 Plan). The taxable gross in Boxes 1 and 17 of the W2 are reduced by this amount. If contributions are made to a Deferred Compensation Plan there is a check mark in the box "deferred compensation" in Box 15 of the W2.	BOX 13 Item G
17	**WIS RETIREMENT IND**	A "Y" will be shown if employee is under WRS and "N" if not under WRS. The "Y" is used to indicate that in Box 15 of the W2 the box "Pension Plan" is checked.	BOX 15
18	**TERM LIFE INSURANCE**	Amount of "taxable" life insurance. Boxes 1, 3, 5, and 17 of the W2 are increased by this amount.	BOX 13 Item C
19	**MEALS AMOUNT**	Amount of total reimbursement received for business meals when NOT away from home overnight. The amount in Boxes 1 and 17 of the W2 are increased by this amount.	BOX 12
20	**MOVING EXPENSE - N/Q**	Taxable portion of moving expense reimbursement. Boxes 1, 3, 5, and 17 on the W2 are increased by this amount.	BOX 14
21	**VEHICLE ALLOWANCE**	Taxable value of courtesy and/or leased cars. Boxes 1, 3, 5, and 17 on the W2 are increased by this amount.	BOX 14
22	**NUMBER OF MILES**	Not used.	NA
23	**EIC PAYMENT**	Amount of Advanced Earned Income Credit received through the calendar year.	BOX 9

ITEM	TITLE	DESCRIPTION	FIELD ON W2
24	**EDUCATION ASSISTANCE**	Taxable amount of Educational Assistance Reimbursement. Box 17 on the W2 is increased by this entire amount. If all or a portion of this amount was for grad-level courses beginning after 7-1-96, this amount is included in Box 1, 3 and 5 also.	BOX 14
25	**PRETAX LIFE**	Amount of life insurance premiums paid on a pretax basis. Boxes 1, 3, 5, and 17 on the W2 are reduced by this amount.	BOX 14
26	**PRETAX HEALTH**	Amount of health insurance and major medical premiums paid on a pretax basis. Boxes 1, 3, 5, and 17 on the W2 are reduced by this amount.	BOX 14
27	**ERA MEDICAL**	Amount of contributions made to an Employee Reimbursement Account to pay medical expenses on a pretax basis. Boxes 1, 3, 5, and 17 on the W2 are reduced by this amount.	BOX 14
28	**ERA DEPENDENT CARE**	Amount of contributions made to an Employee Reimbursement Account to pay dependent care expenses on a pretax basis. Boxes 1, 3, 5, and 17 on the W2 are reduced by this amount.	BOX 14
29	**TSA AMOUNT**	Amount contributed to a Tax Sheltered Annuity Plan (403b Plan). Boxes 1 and 17 on the W2 are reduced by this amount. If contributions are made to a 403b plan, there is a check mark in the box "deferred compensation" in Box 15 of the W2.	BOX 13 Item E
30	**TAX YEAR**	Enter new tax year and press enter or press pf key.	
31	**FUNCTION KEYS**	Pf 2 to go to next calendar year in file. Pf 3 to return to prior calendar year in file. Pf 5 to return to the main menu screen. Pf 8 to view 1042 amounts for the calendar year requested. Pf 9 to view 1099 amounts for the calendar year requested. Pf 11 to exit the transaction.	

9.13   TAX INQUIRIES (cont.)
9.13.3Inquiry to Tax Information (cont.)
TXIQ (1042S)
Press PF 8 from the Main Menu.

```
PYTXM320                      INQUIRY                        01/10/97
PYTXP320                   1042S WORK TABLE                   08:39:16
                         TAX YEAR:  1997     10
NAME: SMITH, CELEBI              PERSON ID:  000999112    SSN: 399112986


                      RATE OF TAX:         0.140000        1
                      TOTAL 1042S AMOUNT:  4500.00         2
                      COMPUTATION AMOUNT:  2799.43         3
                      TAX WITHHELD:        391.92          4
                      EXEMPTION CODE:      0               5
                      INCOME CODE:         15              6
                      COUNTRY CODE:        NL              7
                      RECIPIENT CODE:      01              8

_____
9  PRESS ENTER TO SEE NEXT RECORD
ENTER  F1 - PF2 - PF3 - PF4 - PF5 - PF6 - PF7 - PF8 - PF9 - PF10 - PF11 - PF12
   11      NEXT  PREV        MENU        WKW2        WK99        EXIT
```

The information in TXIQ is loaded from Payroll History each calendar year in approximately mid-January. This calendar year information is retained for three calendar years.

ITEM	TITLE	DESCRIPTION	FIELD ON 1042S
1	**RATE OF TAX**	The percent of tax withholding applied to the wages paid.	(e)--Tax Rate (%)
2	**TOTAL 1042S AMOUNT**	The amount of earnings reportable on a form 1042S consisting of scholarship and/or fellowship payments.	(b)--Gross Income Paid
3	**COMPUTATION AMOUNT**	The Gross Income (b) reported on the 1042S, minus the Withholding Allowances (c) equals the Net Income (d). The Withholding Allowances (c) is not shown on TXIQ but it is recorded on the 1042-S. The Withholding Allowances is 1/12 of the personal allowances plus 1/12 of a dissertator's tuition, times the number of payments paid in the year.	(d)--Net Income

9.0   INQUIRY TRANSACTIONS

ITEM	TITLE	DESCRIPTION	FIELD ON 1042S
4	TAX WITHHELD	The amount of taxes withheld which can be calculated by multiplying Item 1 by Item 3.	(g)--U.S. Federal Tax Withheld
5	EXEMPTION CODE	For Payroll purposes, only two codes are used. Code "0" indicates 15% withholding and Code "4" indicates "Exempt under Tax Treaty". Other codes are defined on the reverse side of the "employee copy" of the 1042S.	(f)--Exemption Code
6	INCOME CODE	A code assigned by the Internal Revenue Service to indicate the type of income. Code 15 - Scholarship or Fellowship Grant Code 18 - Teaching and/or Research Code 19 - Studying and Training Other codes are defined on the reverse side of the "employee copy" of the 1042S.	(a)--Income Code
7	COUNTRY CODE	A code assigned by the IRS for each country.	(h)--Country Code
8	RECIPIENT CODE	For Payroll purposes, only one code is used. Code 01 indicates "Individual".	Line 4
9	ENTER	Press enter to see if there is another 1042S record for this employee.	
10	TAX YEAR	Enter new tax year and press enter or press pf key.	
11	FUNCTION KEYS	Pf 2 to go to next calendar year in file. Pf 3 to return to prior calendar year in file. Pf 5 to return to the main menu screen. Pf 7 to view W2 amounts for the calendar year requested. Pf 9 to view 1099 amounts for the calendar year requested. Pf 11 to exit the transaction.	

9.0 INQUIRY TRANSACTIONS

9.13 TAX INQUIRIES (cont.)
9.13.3 Inquiry to Tax Information (cont.)
TXIQ (1099) (cont.)

The data on the 1099 Work Table is loaded in mid-January and includes the amount of payments received as Fellowships. This information is provided to the payee in an Information Letter form UW1441 at the same time as other tax information documents are produced. This letter is not an official IRS document.

Press PF 9 from the Main Menu.

```
PYTXM330                     INQUIRY                           01/10/97
PYTXP330                  1099 WORK TABLE                      08:37:25

                         TAX YEAR:  1997          3
NAME: SMITH, SUSAN C               PERSON ID:  00898991    SSN: 428459912



                    TOTAL 1099 AMOUNT:       13248.75     1


                    WITHHELD 1099 AMOUNT:                 2



                                           4
_____
ENTER PF1 - PF2 - PF3 - PF4 - PF5 - PF6 - PF7 - PF8 - PF9 - PF10 - PF11 - PF12
                                  MENU        WKW2  WK42              EXIT
```

ITEM	TITLE	DESCRIPTION
1	**TOTAL 1099 AMOUNT**	Total amount paid to the following recipients: Title Code Appointment Title X21NN Fellow Y23NN Trainee Y26NN Advanced Opportunity Fellow X10NN Postdoctoral Fellow X30NN Postdoctoral Trainee X75NN Graduate Intern/Trainee Y22NN Scholars Prior to January 1, 1997 it included Research Assistants.
2	**WITHHELD 1099 AMOUNT**	This field will always be blank.
3	**TAX YEAR**	Enter new tax year and press enter or press pf key.
4	**FUNCTION KEYS**	Pf 2 to go to next calendar year in file. Pf 3 to return to prior calendar year in file. Pf 5 to return to the main menu screen. Pf 7 to view W2 amounts for the calendar year requested. Pf 8 to view 1042 amts for the calendar year requested. Pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.14   UNCLASSIFIED LEAVE INQUIRY
Enter UCLI (space)

```
PBUCLM13                 UNCLASSIFIED LEAVE ACCOUNTING              03/25/96
                               MAIN MENU                           15:31:55

                          For 02 1996




                    V  View leave for appointment
                    P  View leave for person
                    H  View leave history
                    F  Forecast leave for changes and terminations



    1    Pick an option ==> _  _____




                    2
Enter-PF1--PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     HELP                APPI  APPR                             EXIT
```

ITEM	TITLE	DESCRIPTION
1	**PICK AN OPTION**	Select V, P, H, or F from the menu to view unclassified leave for an employee. Option P requires Person ID or SSN to be entered in second position. Options V, H or F require Appt ID to be entered in second position.
2	**FUNCTION KEYS**	Pf 4 (APPI) to view a particular appointment. Pf 5 (APPR) to view all appointments for an employee. Pf 11 to exit the transaction.

9.0 INQUIRY TRANSACTIONS

9.14 UNCLASSIFIED LEAVE INQUIRY (cont.)

View Unclassified Leave for Appointment

The View Leave for Appointment Screen displays leave information about the employee's last statement, contents of the statement and leave information for the month currently being processed. Only leave types for which the appointment is eligible are shown.

Fast Path Entry is UCLI (space) V/Appointment ID

```
PBUCLM04                    VIEW LEAVE FOR                    09/25/93
                         APPOINTMENT 00059422                 16:05:32
  HERBERT, JANET C
                                          4  Intl Sk Lv Entlmnt Ends: 04 21 1990
 1    Lv Stmt Date: 09 01 1993
 2     Stmt Distr: Sec 03 A031300        5        Prior Rpts Missing: NO
 3  Based on Pay %: 100.0                6        Lv Record Active: 06 24 1991
   ---- -- AMOUNTS ARE REPRESENTED IN HOURS -- ----------------------------
   Lv    Prior    Earn  Used  Adjust  End Bal   Earn   Used  Adjust  End Bal
 7 Type  Balance  Aug   Aug             Aug      Sep    Sep           Sep
   ----  --------------------------------- -----8-------9-----10-----11-
   VN    176.0          40.0           136.0            NR            136.0
   SL     80.0    8.0                   88.0    8.0                    96.0
   FH      0.0                           0.0                            0.0




  Command ===12_____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8--PF9---PF10--PF11--PF12---
     HELP               HSTRY PRSN  FRCST    13 _   NORPT         EXIT  CAN
```

ITEM	TITLE	DESCRIPTION
1	LV STMT DATE	This shows the date of the last leave statement issued for this appointment
2	STMT DISTR	Indicates the payroll Section/PEG to which the leave statement was distributed.
3	BASED ON PAY %	The "payroll percent" which was used to calculate the amounts earned during the reported pay period
4	INTL SK LV ENTLMNT ENDS	Indicates the end date of the initial sick leave entitlement period.
5	PRIOR RPTS MISSING	Indicates if any leave reports have not been returned. The leave statement does not display leave information when reports are missing.
6	LV RECORD	Shows the status of the leave record (Active or Inactive) and the date the status was established.

9.0   INQUIRY TRANSACTIONS

9.14   UNCLASSIFIED LEAVE INQUIRY (cont.)
View Unclassified Leave for Appointment (cont.)
Fast Path Entry is UCLI (space) V/Appointment ID

ITEM	TITLE	DESCRIPTION
7	**PRIOR BALANCE EARN, USED, ADJUST & END BALANCE**	These columns show amounts as they were printed on the latest employee leave statement unless there are usage reports missing. Columns to the right show leave for current pay period being processed.
8	**EARN**	Earned amounts are automatically calculated on the 15th of each month for the previous pay period shown. "NA" will appear in this column before the earned amounts are calculated.
9	**USED**	Either the amount of usage or zero is shown when usage has been recorded for the month. "NR" will appear in this column if entry hasn't been completed yet for the month or the employee has not returned the reporting form
10	**ADJUST**	Adjustments are shown after the 15th and include corrections for recording errors, adjustments for payment corrections, appointment FTE changes, etc.
11	**END BAL**	The sum of the previous END BAL plus amounts in the columns on the right side of the screen.
12	**COMMAND**	Enter an Appointment ID to get same screen, different appointment. Enter the letter of screen desired to get different screen, same appointment. Enter letter of the screen desired (space) */pay period (mmyy) to get different screen, same appointment, different pay period. Enter the letter of screen desired (space) Appointment ID to get different screen, different appointment. Enter letter of screen desired (space) Appointment ID/ Pay period for a different screen, different appointment and different pay period.
13	**FUNCTION KEYS**	Pf 4 (HSTRY) to view the monthly leave history for this appointment. Pf 5 (PRSN) to view the UCLA appointments and leave for this person. Pf 6 (FRCST) to request the Forecast Leave for Changes & Terminations screen for this appointment. Pf 9 (NORPT) to view the months for which reports are outstanding. Pf 12 (CAN) to return to the main menu. Pf 11 to exit this transaction

9.0 INQUIRY TRANSACTIONS

9.14 UNCLASSIFIED LEAVE INQUIRY (cont.)
View Unclassified Leave for Person

The View Leave for Person screen will display all current UCLA leave balances by appointment for a person. This is to assist in determining the total amount of sick leave that an employee has in multiple appointments and to ensure all leave balances have been accounted for when an appointment has ended.

Fast Path Entry is UCLI (space) P/SSN

```
PBUCLM05                    VIEW LEAVE FOR PERSON                11/30/95
                                                                 15:14:30

   HELLERSTEIN, HAROLD S
   Person ID: 00058872 SSN: 405168010 Initial Entitlement End Date: 12 31 1985
   ALRA Counter: 402
           1 Leave                              Pay  Major
   Appt ID   Status Type  Title                 Bas  Dept      Begin     End
2 _ 00045888   A     AS   ASSOC RESEARCHER       A   A014700
3    hours=> VN: 176.0    VC: 85.0     SL: 3152.0              FH: 0.0
                                                               AR: 80.0




   Command ===4_____
   Enter-PF1--PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
       HELP  COUNT          VAPPT AUDIT PREV  NEXT      5        EXIT  CAN
BALANCES SHOWN THROUGH 10-1995
```

9.0   INQUIRY TRANSACTIONS

9.14   UNCLASSIFIED LEAVE INQUIRY (cont.)
View Unclassified Leave for Person (cont.)
Fast Path Entry is UCLI (space) P/SSN

ITEM	TITLE	DESCRIPTION
1	**LEAVE STATUS**	Displays "A" when the leave information is active within UCLA and "I" when the leave information is inactive
2	**APPT ID**	The first line for each appointment displays current information from the Appointment system.
3	**HOURS**	The second line shows the current types and amounts of leave in the UCLA system for each appointment
4	**COMMAND**	Enter an Appointment ID to get same screen, different appointment. Enter the letter of screen desired to get different screen, same appointment. Enter letter of the screen desired (space) */pay period (mmyy) to get different screen, same appointment, different pay period. Enter the letter of screen desired (space) Appointment ID to get different screen, different appointment. Enter letter of screen desired (space) Appointment ID/ Pay period for a different screen, different appointment and different pay period.
5	**FUNCTION KEYS**	Pf 2 (COUNT) to activate the ALRA window to recalculate the ALRA counter You can switch to the View Leave for Appointment screen by placing the cursor in front of one of the Appointment IDs and pressing pf 5 (VAPPT). If you do not select an appointment when pf 5 is pressed, the Appointment ID at the top of the list will be selected automatically. Pf 6 (AUDIT) to view the audit trail of settings and the date-time for each entry. Pf 7 (PREV) to return to a previous pay period or Pf 8 (NEXT) to advance to the next pay period. Pf 12 (CAN) to return to the main menu. Pf 11 to exit the transaction

9.0   INQUIRY TRANSACTIONS

9.14   UNCLASSIFIED LEAVE INQUIRY (cont.)
View Unclassified Leave History
Fast Path Entry is UCLI (space) H/Appointment ID

```
 PBUCLM09                      LEAVE HISTORY                      06/25/91
                                                                  16:26:39
  BAKER, ERNESTINE Q                   Appt ID: 00059412


             ---------------- AMOUNTS ARE REPRESENTED IN HOURS ----------------
   Pay        Vacation      Sick Leave    C Cov  Float Hol   Sabb    Pers Hol
   Period    Earn  Used    Earn   Used    Used   Earn Used   Used   Earn Used
   -------  ------------  -------------   -----  ---------- ------  -----------
1 05 1991   14.7  16.0*   8.0    8.0*    16.0*
2           8.0   HRS OF SICK LEAVE TRANSFERRED IN FROM ANOTHER APPT

3 04 1991   14.7*  8.0    8.0    96.0*

   03 1991  14.7          8.0

   02 1991  14.7          8.0

 COMMAND ===5 _____
Enter-PF1---PF2---PF3---PF4---PF5--PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP                             P-SCR N-SCR    6        EXIT  CAN
  TO VIEW AUDIT TRAIL, ENTER 'A' NEXT TO THE PAY PERIOD TO BE AUDITED
```

AUDIT LOG WINDOW
The Audit Log Window shows all changes to leave entries for a pay period. It can be accessed from "Update Usage for Appointment", Update Earnings for Appointment", "View Leave for Person", "Mark Appointment for Special Processing", or "View Leave History" screens.

```
PBUCLM09                      LEAVE HISTORY                      06/25/91
                                                                16:26:39
  BAKER, ERNESTINE Q                   Appt ID: 00059412
              +----------------------------------------------------------+
   Pay        !                                                          !
   Period  E !   4    Audit trail for appointment 00059412       !d
   ------- -- !              pay period 04 1991                   !--
   05 1991  1 !                                                          !
           ! !           hours    change by    date-time stamp         !
3 A 04 1991 1 !                                                         !
           ! !    VN EARNED                                             !
           ! !             14.7    GML      06/25/1991 16:06:58.95    !
   03 1991  1 !             7.4     PB0605   06/24/1991 15:02:08.51    !
           ! !                                                         !
   02 1991  1 !    SL USED                                             !
           ! !             96.0    GML      06/25/1991 15:02:08.51    !
   01 1991  1 !             88.0    NZB      05/15/1991 11:02:08.51    !
           ! !             0.0     NZB      05/10/1991 13:22:56.07    !
COMMAND ===+----------------------------------------------------------+
Enter-PF1---PF2--PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP                          P-SCR N-SCRN              EXIT  CAN
```

9.0   INQUIRY TRANSACTIONS

9.14   UNCLASSIFIED LEAVE INQUIRY (cont.)
View Unclassified Leave History (cont.)
The Leave History screen provides detailed historical inquiry to the leave credits and debits associated with an appointment. Up to six pay periods are displayed at once.
Fast Path Entry is UCLI (space) H/Appointment ID

ITEM	TITLE	DESCRIPTION
1	**PAY PERIOD**	The display shows the monthly detail.
2	**HOURS TRANSFERRED**	A separate entry is shown and a message is displayed when amounts of leave are added to or removed from an appointment for reasons other than earnings or usage.
3	**ASTERISK**	Amounts with an asterisk indicate that the original entry was changed and that an audit trail exists for that entry. To view the audit log for any pay period, place the cursor on the line in front of the appropriate pay period, type "A" and ENTER. Use the "tab" or "back tab" keys to be sure the cursor is the proper position.
4	**AUDIT LOG WINDOW**	The "change by" column shows either the logon initials from the terminal used to update the hours or the computer program (i.e., PB0605) that calculated the number of hours. Date indicates when the change was done.
5	**COMMAND**	Enter an Appointment ID to get same screen, different appointment. Enter the letter of screen desired to get different screen, same appointment. Enter letter of the screen desired (space) */pay period (mmyy) to get different screen, same appointment, different pay period. Enter the letter of screen desired (space) Appointment ID to get different screen, different appointment. Enter letter of screen desired (space) Appointment ID/ Pay period for a different screen, different appointment and different pay period.
6	**FUNCTION KEYS**	Pf 7 (P-SCR) to display the screen with prior dates when available. Pf 8 (N-SCR) to display the next sequential screen of later pay periods when available. If entry is interrupted, press pf 12 (cancel) to return to main Menu and then use Restart Option to continue entry. Pf 11 to exit the transaction

9.0 INQUIRY TRANSACTIONS

9.14 UNCLASSIFIED LEAVE INQUIRY (cont.)

Forecast Unclassified Leave for Changes and Terminations

This screen is used to forecast vacation and floating holiday leave amounts for terminations and changes in annual appointment percentages. The forecast is meant to answer "what if" calculations and does not update any leave information. This screen will not forecast leave for ERG appointments.

Fast Path Entry is UCLI (space) F/Appointment ID

```
PBUCLM08            FORECAST LEAVE FOR CHANGES AND TERMINATIONS        07/09/93
                                                                       11:06:39


 GLOVER, EDWARD N                                      Major Dept: G300200
  Appt ID: 00059494         Appt Begin: 03 15 1990        Continuity: 03
     Type: AS               Appt End: Pay Basis: A
    Title: ASST DIR, CMPTR SV/S
      FORECAST USES APPT % OF  50.0000 EFF 06-01-1993 UNLESS CHANGED BELOW
                           Appt End   06 30 1993    1
      2      Appt Percent   _____      Percent Eff Date   __ __ ____
               Appt Percent   _____      Percent Eff Date   __ __ ____


                              Vac     F Hol

      3      Actual Earnings   161.7      0.0    Thru  05  1994
      4    + Will Earn           7.4      0.0
      5    - Used                0.0      0.0    Last entry: 05 1994    6
             -------------------------------     Prior Rpts Missing: NO   7
             Balance            169.1      0.0

COMMAND ===8 _____     9
Enter-PF1---PF2---PF3--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
      HELP                                                      EXIT  CAN
CREDITS 07-01-1993 THRU 05-31-1994 FORECAST FOR 06-01-1994 THRU 06-30-1994
```

9.0   INQUIRY TRANSACTIONS

Forecast Unclassified Leave for Changes and Terminations (cont.)
Fast Path Entry is UCLI (space) F/Appointment ID

ITEM	TITLE	DESCRIPTION
1	APPT END	This field is filled with the appointment end date if available. It can be changed or removed. If end date is blank, leave amounts are forecast through the end of the fiscal year being processed.
2	APPT PERCENT AND PERCENT EFF DATE	Enter one or two percentages and the date that the change is effective.
	ENTER	Press enter after updates are made. Screen will show the period of time for which actual earned amounts are recorded and the period of time of projections..
3	ACTUAL EARNINGS	Displays leave carried over into the fiscal year currently being processed plus leave earned through month and year shown.
4	WILL EARN	This calculation includes leave forecast up to the End Date or the end of the fiscal year being processed if End Date is blank.
5	USED	Displays amount of usage recorded for fiscal year.
6	LAST ENTRY	Indicates the last pay period for which entry of usage is completed.
7	PRIOR REPORTS MISSING	"YES" indicates that usage reporting forms have not been returned.
8	COMMAND	Enter an Appointment ID to get same screen, different appointment. Enter the letter of screen desired to get different screen, same appointment. Enter letter of the screen desired (space) */pay period (mmyy) to get different screen, same appointment, different pay period. Enter the letter of screen desired (space) Appointment ID to get different screen, different appointment. Enter letter of screen desired (space) Appointment ID/ Pay period for a different screen, different appointment and different pay period.
9	FUNCTION KEYS	If entry is interrupted, press pf 12 (CAN) to return to main Menu and then use Restart Option to continue entry. OR press pf 11 to exit the transaction

9.0 INQUIRY TRANSACTIONS

9.15 W4 INQUIRY

This screen displays information entered from the W4 submitted by employee and Health County for those employees with health insurance.

Enter W4IQ (space) SSN

```
SSN: 388 88 8888                    PERSON ID:  00050341
 NAME: BLUTARSKY, SENATOR           EMP NUMBER: 121212
 DOB(MM DD CCYY): 02 02 1945  SEX: F  MARITAL: S  VISA: 1
1 WORK AUTH EXP DATE: 12 20 1995
 EMPLOYED COUNTY: 13  DANE           HEALTH COUNTY: 55  ST. CROIX


 FEDERAL TAX
2  STATUS: S  NUMBER OF EXEMPTIONS: 02  ADDITIONAL $:
 STATE TAX
   STATUS: S  NUMBER OF EXEMPTIONS: 02  ADDITIONAL $:
 HOME PHONE: ( 608 ) 262 - 2222
 HOME ADDRESS
   STREET:      1234 ANYWHERE ST
3  CITY, STATE: MAD CITY, WI
   ADDITIONAL:
   ZIP:         54734   RELEASE ADDRESS: N
4 DATE OF W4(MM DD YY): 04 04 94
 NEXT KEY:   5
 NON-EMP WITHHOLD:  FED(Y/N):   STATE(Y/N):      ....    ....   ....
 NE EXEMPT EXPIRES(MM DD YY):                   SIGNON  SIGNOFF AVAL
                                             5  =-1     =1      =+0
                                                /RELEASE /EXIT   ....
```

ITEM	TITLE	DESCRIPTION
1	EMPLOYEE INFO	Displays employee information entered from the W4. Health County is entered from the health insurance application.
2	TAX STATUS EXEMPTIONS	Displays Tax Status and number of exemptions from last W4 filed by employee. If student filed Exempt, exemptions will show T6 (exempt for 1996).
	ADDITIONAL	If employee indicated they are residents of Illinois, Michigan, Minnesota, Indiana, or Kentucky, NT is displayed. If employee indicated they are legal resident of another state and their work is performed outside of Wisconsin, NT is also displayed. Displays Additional Dollar Amount requested by employee
3	HOME ADDRESS	Displays most recent home address for employee. Can be entered from any change of address form.
4	W4 DATE	Displays the date of the last W4. Is not updated for any address change, only for a W4 change in exemptions, etc.
5	NEXT KEY	Enter SSN of next employee you wish to view or pf 11 to exit the transaction.

9.0   INQUIRY TRANSACTIONS

9.16   YEAR TO DATE INQUIRY

YTD Calendar

This screen shows the employee's date of birth, up to two titles/UDDS, tax elections, Social Security and Retirement coverage, year-to-date earnings and withholdings.

Enter INQY (space) SSN

```
121212 1  BLUTARSKY, SENATOR
       2  02-02-45  SINGLE  FEMALE    11   PATIENT CARE

       3  RETIREMENT: 4-1 %                  VISA 1
       4   LAST PAID APR  SECTION 21   CLASSIFIED C

 SEC-UDDS : 21-A544000

 INCOME INFORMATION - SOCIAL SECURITY NUMBER  388-88-8888
       5  FEDERAL  STATUS: S   EXEMPTIONS: 02   ADDL $:      EIC:    FUT:
             STATE        S                 02
FEDERAL GROSS       YTD=    44,457.69   MTD=       637.28
FEDERAL TAX         YTD=    21,262.30   MTD=        52.50
STATE GROSS         YTD=    44,457.69   MTD=       637.28
STATE TAX           YTD=     2,699.50   MTD=        28.40
EIC GROSS           YTD=                MTD=
EIC PAID            YTD=                MTD=
SOC SEC GROSS       YTD=           .00
SOC SEC TAX         YTD=     2,031.11
EXTERNAL SOC SEC    YTD=
RETIREMENT GROSS    YTD=    46,251.04                ...     ...      ...
                                               SIGNON  SIGNOFF   AVAL
 TOTAL EARNINGS (SINCE JAN 1) :  46,251.04     =-1      =1       =+0
                                               /REL    /EXIT     ...
```

ITEM	TITLE	DESCRIPTION
1	NAME	Displays employee's name
2	PERSON DATA	Displays Birth date, Marital Status, Gender, and B.U.
3	RETIREMENT/ VISA	Displays Retirement Percent and Visa Status
4	LAST PAID/ SECTION	Displays Month last paid, Section, and Calc description
5	INCOME INFORMATION/ SSN	Displays Federal and State Exemptions and year to date and month to date totals.

9.0   INQUIRY TRANSACTIONS

9.16   YEAR TO DATE INQUIRY (cont.)

YTD Fiscal

This screen shows the employee's budgeted and paid YTD amounts for the fiscal year.

Enter INQR (space) S/SSN

```
10 NEXT: ..............................  TP EXIT: ........
                              APPT    1 OF   2
                              SPLIT   2 OF   3
    1         REQ#  00099999     JONES, JOAN K     1B
    2         YEAR 7           OPEN      APPOINTMENT
    3         FUND 101         BEG-DATE  06-23-96
    4         ACCT             END-DATE  06-21-97
    5         UDDS A-03-6000   BUS SV/EMP COMP&BEN SVC/GENERAL
              ACT  1           INSTIT'L SUPPORT
              CLAS 1521        PERMANENT   HOURLY
    6                          ORIG-AMT    20,999.00
    7         RECORD 07-33-96  TOT-PAID    11,708.48
    8         TRN DT 01-23-97  OPEN-BAL     9,290.52
              PAID-THIS-MONTH        2,500.00
              LAST VOUCHER NUMBER 008888  AGRMNT%   0.0000
 9 APPT DATA AS OF: 01-27-97 SOCIAL SECURITY NUMBER  333-33-3333
   NAME JONES, JOAN K               TITLE 21101 PAY & BENEFITS SPEC 1
   RATE          10.111 BASIS H HOURLY            BARG-UNIT 02
   APPT BEG-DATE 08-13-89
   APPT END-DATE                              ...      ...      ...
                                              ...      ...      ...
                                   11  =-1      =1       =+0
                                        ...    /EXIT    ...
```

ITEM	TITLE	DESCRIPTION
1	NAME	Displays employee's name.
2	YEAR	Identifies fiscal year
3	FUND/ BEGIN DATE	Identifies funding source and begin date of funding; i.e. beginning of fiscal year or begin date of appointment, whichever is later.
4	END DATE	Identifies end date of funding; i.e. end of fiscal year or end date of appointment, whichever is later.
5	UDDS	Identifies UDDS of appointment.
6	ORIG AMT	Identifies original budgeted amount.
7	TOT PAID	Identifies total amount paid to date within fiscal year.
8	TRN DT/ OPEN BAL	Identifies date of last payroll calculation and current balance of budgeted amount.
9	APPT DATA	Displays appointment data, i.e. SSN, name, title, rate, BU and appointment begin and end dates.
10	NEXT/TP EXIT	Enter S/SSN in the NEXT field if you wish to view another employee or the transaction you want to access in TP EXIT field and press enter.
11	FUNCTION KEYS	Press pa 1 to view next page (split). Press pf 11 (EXIT) to end transaction.