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General Payroll Intake Job Aid:

HC Supervisor

September 2022

Document Control Information History

The table below captures the historical changes made to this document in order to provide transparency and traceability.

Document Information

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Rev.	Date	Changes Made by	Reviewed by	Section(s) Effected	Summary of Changes

Table of Contents

Overview

This job aid outlines the required steps for HC Supervisors to view HC Supervisor Dashboards and access payroll cases. It will highlight the various steps HC Supervisors will need to navigate when using ServeU, including all screens, buttons, and fields they will interact with as they view dashboards and payroll cases.
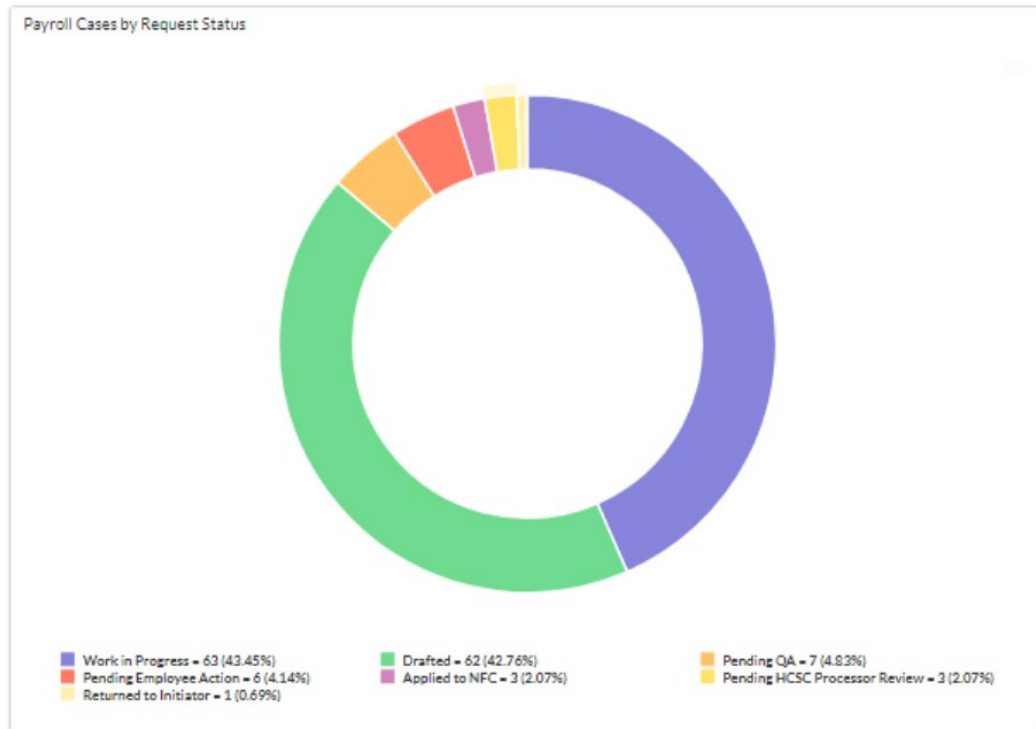
Roles & Responsibilities

HC Supervisors will be responsible for managing and reporting on all payroll cases. They will be able to do so by accessing and filtering the Payroll Case Table, as well as viewing the HC Supervisor Dashboards.

HC Supervisor Dashboard

The HC Supervisor Dashboard includes six components: Payroll Cases by Request Status, Payroll Cases by HR Service, Payroll Cases by HR Specialist, Payroll Cases by Region, Payroll Cases by HCSC Processor, and Total Payroll Cases.

a) **Payroll Cases by Request Status** provides a visual representation of all Payroll cases broken down by request status.

Payroll Cases by Request Status

- Work in Progress = 63 (43.45%)
- Drafted = 62 (42.76%)
- Pending QA = 7 (4.83%)
- Pending Employee Action = 6 (4.14%)
- Applied to NFC = 3 (2.07%)
- Pending HCSC Processor Review = 3 (2.07%)
- Returned to Initiator = 1 (0.69%)

b) **Payroll Cases by HR Services** provides a visual representation of all Payroll cases broken down by HR Service.

Payroll Cases by HR Service

- Debt Management = 24 (16.55%)
- Payroll Documents = 23 (15.86%)
- Military Pay = 20 (13.79%)
- Leave = 13 (8.97%)
- Indebtedness = 11 (7.59%)
- Verifications = 8 (5.52%)
- WebTA = 8 (5.52%)
- Pay Statement Request = 6 (4.14%)
- Admin Inquiries = 5 (3.45%)
- Pay Concerns = 5 (3.45%)
- Unemployment Compensation = 5 (3.45%)
- (empty) = 4 (2.76%)
- Other = 13 (8.97%)
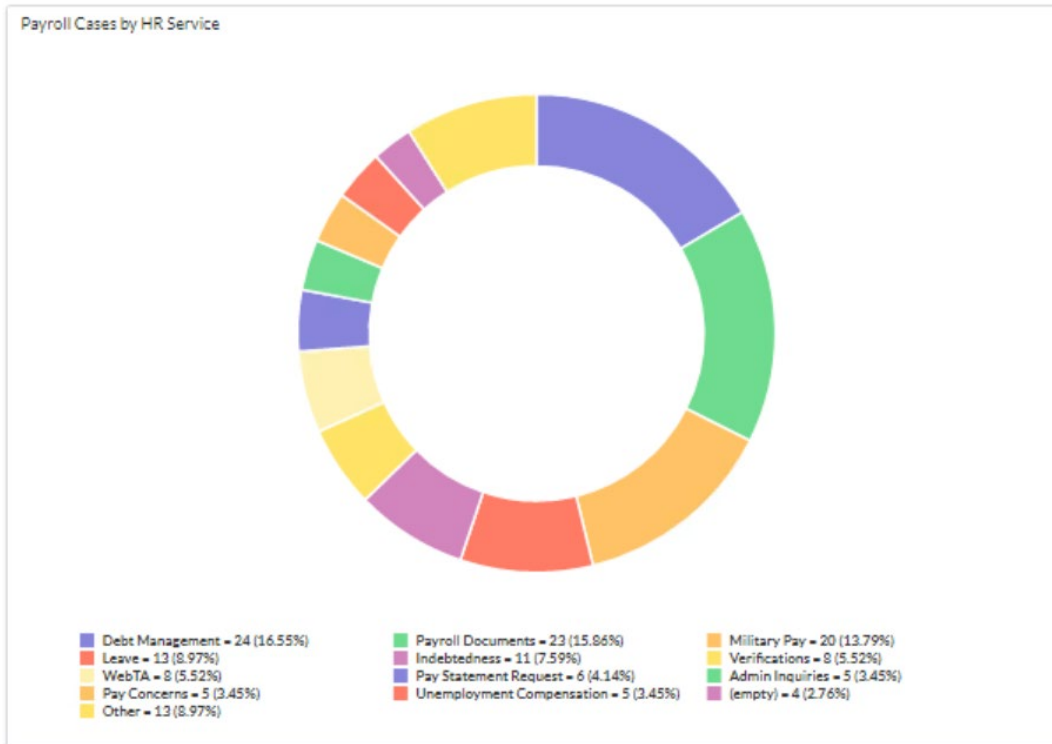
c) **Payroll Cases by HR Specialist** provides a visual representation of all Payroll cases broken down by HR Specialist.

Payroll Cases by HR Specialist

- (empty) = 89 (61.38%)
- Test 1, HCSC Payroll = 24 (16.55%)
- Test 13, HCSC Payroll = 5 (3.45%)
- Test 7, HCSC Payroll = 4 (2.76%)
- Test 11, HCSC Payroll = 3 (2.07%)
- Test 3, HCSC Payroll = 3 (2.07%)
- Beaney, Nalani, = 2 (1.38%)
- Test 12, HCSC Payroll = 2 (1.38%)
- Test 5, HCSC Payroll = 2 (1.38%)
- , HR Specialist 1 = 1 (0.69%)
- Barlow, Yoshio = 1 (0.69%)
- Becerra, Karlos = 1 (0.69%)
- Other = 8 (5.52%)
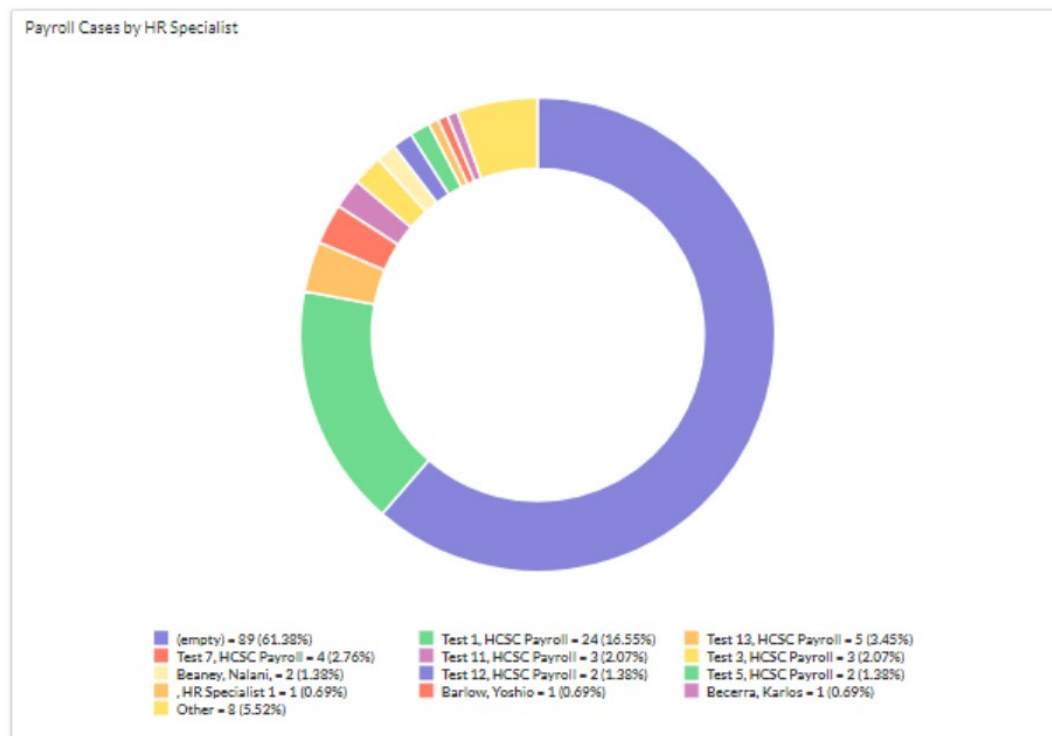
d) **Payroll Cases by Region** provides a visual representation of all Payroll cases broken down by region.

Payroll Cases by Region

- Northeast = 49 (33.79%)
- (empty) = 42 (28.97%)
- South = 21 (14.48%)
- InterMountain = 16 (11.03%)
- MidAtlantic = 8 (5.52%)
- Central = 5 (3.45%)
- West = 4 (2.76%)
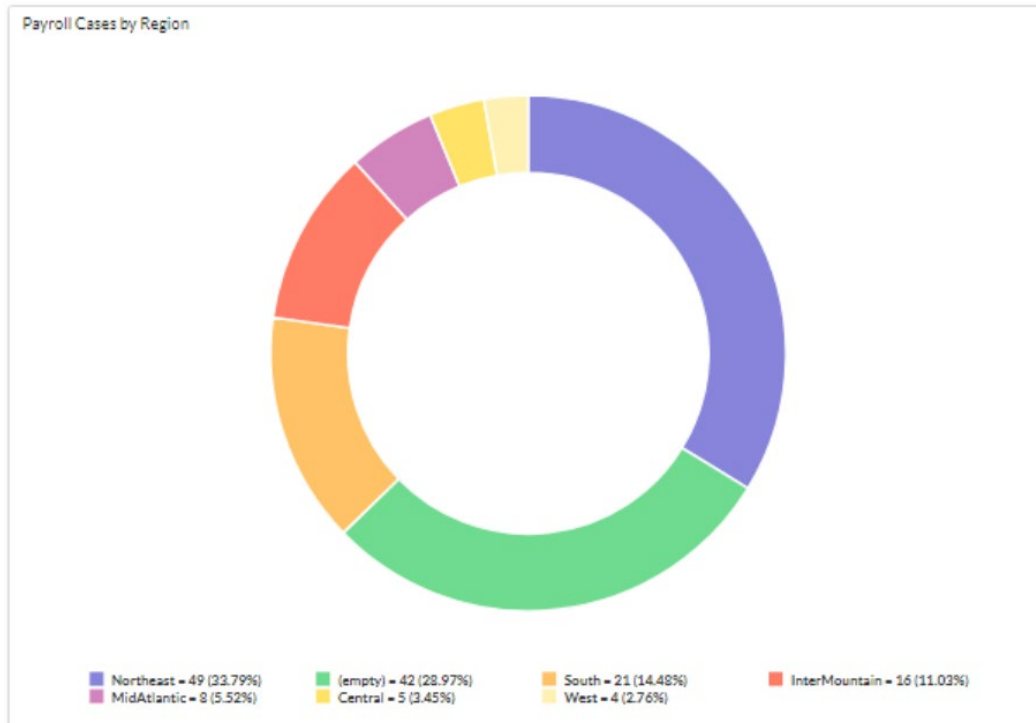
e) **Payroll Cases by HCSC** Processor provides a list of all Payroll cases and who it's assigned to.

Payroll Cases by HCSC Processor

Request Status	Request Number	Initiator	Employee Name	HR Service	HR Service Type	Short Description	Assignment group	Assigned to	Airport Code
Drafted		Crotts, Rubin, Andres	Crotts, Rubin, Andres	Military Pay	(empty)	Military Pay case for Rubin Crotts	HCSC Payroll	Test 1, HCSC Payroll	JFK
Drafted		Synnot, Gerard,	Synnot, Gerard,	Debt Management	(empty)	Debt Management case for Gerard Synnot	HCSC Payroll	Test 1, HCSC Payroll	ORH
Drafted		Smaleman, Rogers	Smaleman, Rogers	Military Pay	Military Reserve Pay Differential	Military Pay case for Rogers Smaleman	HCSC Payroll	Test 1, HCSC Payroll	TYR
Drafted		Have, Powell,	Have, Powell,	Debt Management	Child Support	Debt Management case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI
Drafted		Have, Powell,	Have, Powell,	eTAS	System Performance	eTAS case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI
Drafted		Have, Powell,	Have, Powell,	Payroll Documents	Address Change	HR Documents case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI
Drafted		Have, Powell,	Have, Powell,	Indebtedness	Debt Waiver	Indebtedness case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI
Drafted		Have, Powell,	Have, Powell,	On the Job Pay Incentives	Coaching Incentives	On the Job Pay Incentives case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI
Drafted		Have, Powell,	Have, Powell,	Pay Concerns	No Pay	Pay Concerns case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI
Drafted		Have, Powell,	Have, Powell,	Pay Documents	EPP SINQ Errors	Pay Documents case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	ABI

f) **Total Payroll Cases** provides a list of all submitted payroll cases.

(empty)	Drafted	Have, Powell,	Have, Powell,	Pay Documents	EPP SINQ Errors	ABI	Pay Documents case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	Have, Powell,	Have, Powell,	Pay Statement Request	W2 Reports	ABI	Pay Statement Request case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	Have, Powell,	Have, Powell,	Unemployment Compensation	Employee Upload Form	ABI	Unemployment Compensation case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	Have, Powell,	Have, Powell,	Verifications	Mortgage/Rental VOE	ABI	Verifications case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	Have, Powell,	Have, Powell,	WebTA	Timecard Force Validations	ABI	WebTA case for Powell Have	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	may, april	may, april	Military Pay	Military Reserve Pay Differential	DCA	Military Pay case for april may	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	may, april	may, april	Debt Management	Tax Levies	DCA	Debt Management case for april may	HCSC Payroll	Test 1, HCSC Payroll	
(empty)	Drafted	Crotts, Rubin, Andres	Crotts, Rubin, Andres	Military Pay	Military Reserve Pay Differential	JFK	Military Pay case for Rubin Crotts	HCSC Payroll	Test 1, HCSC Payroll	
TYR-22-070416	Drafted	Smaleman, Rogers	Smaleman, Rogers	Unemployment Compensation	Employee Upload Form	TYR	Unemployment Compensation case for Rogers Smaleman	HCSC Payroll	Test 1, HCSC Payroll	
TSA-22-070417	Drafted	Barajas, Eunice,	Barajas, Eunice,	Debt Management	Processing Fees Returned	000	Debt Management case for Eunice Barajas	HCSC Payroll	Test 1, HCSC Payroll	
JFK-22-070418	Drafted	Crotts, Rubin, Andres	Crotts, Rubin, Andres	Military Pay	Military Reserve Pay Differential	JFK	Military Pay case for Rubin Crotts	HR Tier 1	(empty)	

Payroll Case Table

The Payroll Case table displays all submitted payroll cases. Within the table, you can customize the column headers that appear on top of each column, the order in which columns appear, and the sorting of cases within each column. You can also search through these columns using the search function and filtering cases via the asterisk shortcut and condition builder.

Viewing and Accessing Payroll Cases

To view and access payroll cases, you will need to navigate to the Payroll Cases table. To get to the table:

1. Click on the "All" tab located at the top left.
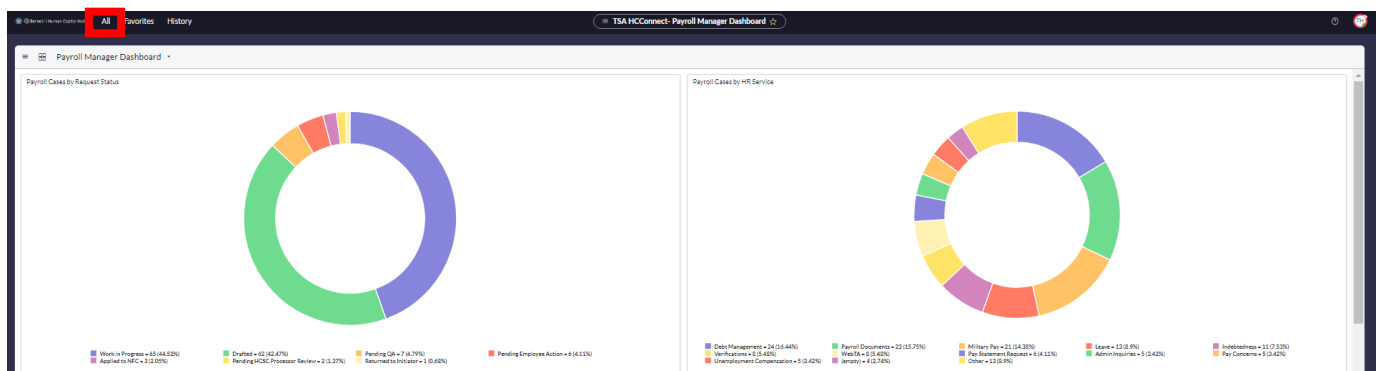
2. Upon clicking "All," a drop-down list will appear. Navigate to the section titled "Payroll Worklist" and click "Payroll Case Table."
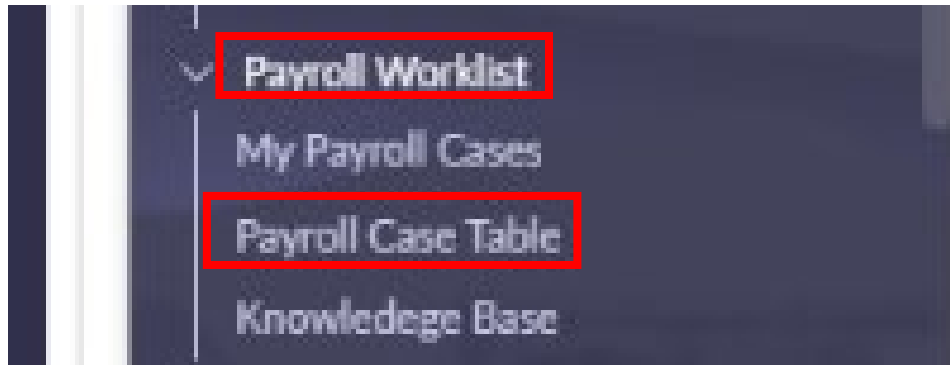
3. From there, you will be redirected to the Payroll Case Table, listing all submitted payroll cases.

Adding Payroll Case Table to Favorites

For easier access to the Payroll Case Table, you can add it to your Favorites. To do so:

1. Click the "All" tab located at the top left.
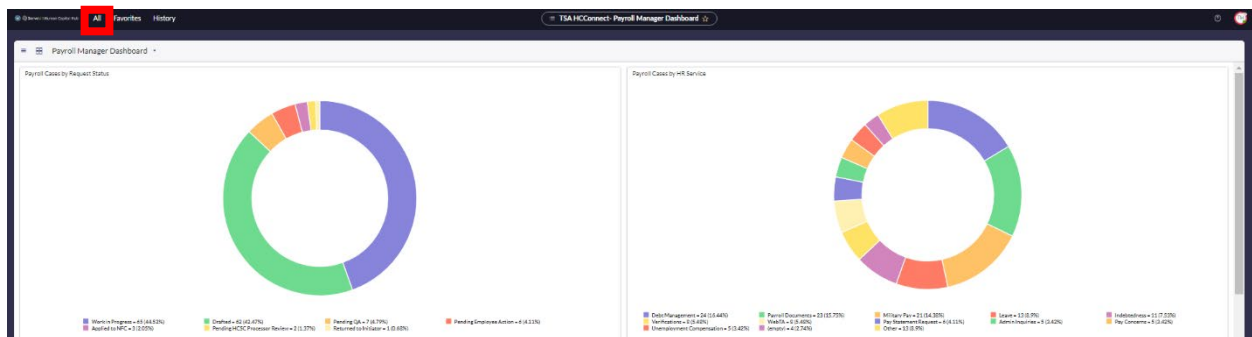
2. Hover over "Payroll Case Table," listed under the "Payroll Worklist" section and a yellow star will appear.
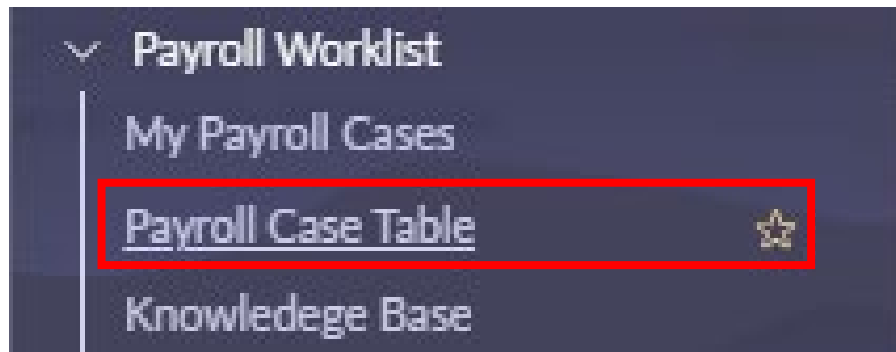
3. Click the yellow star and the table will be added to your favorites, located at the top left of the page.
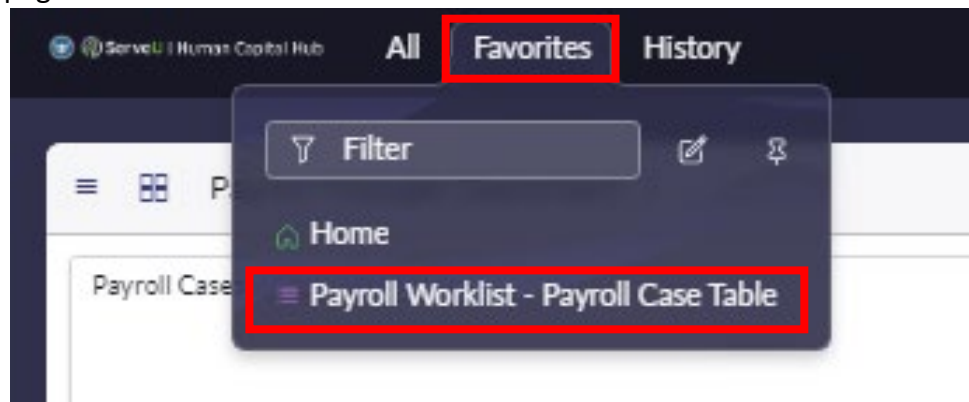
Personalizing Column Headers

When personalizing column orders, **please note that your edits will not affect anyone else's view.** To add and/or remove columns:

1. Click the gear icon in the top right corner to open the "Personalize List Columns" pop-up.
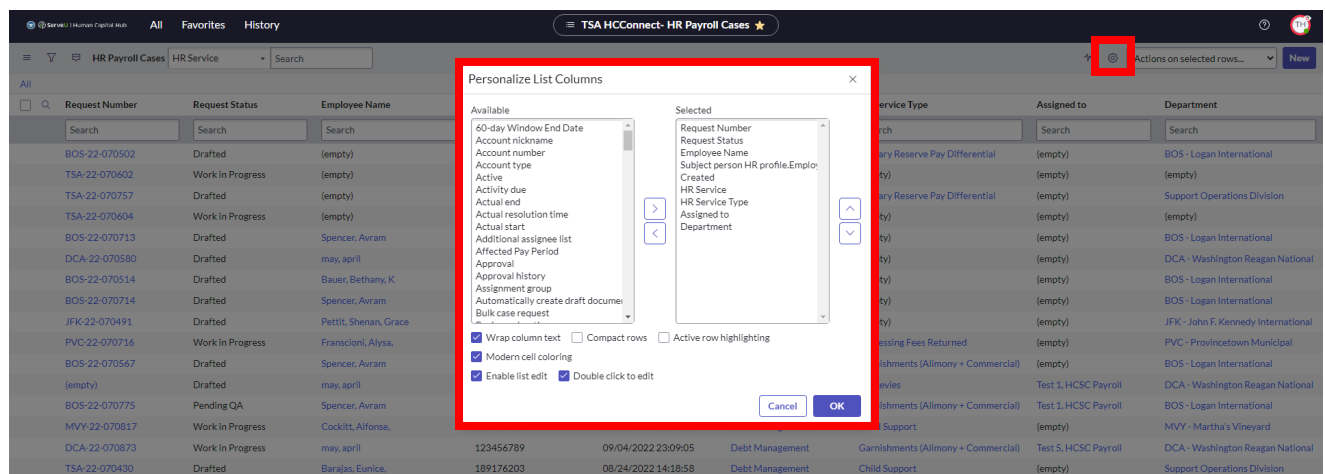
2. On the left, a box titled "Available" is displayed with all available columns to choose from and display in your table. On the right, a box titled "Selected" is displayed with every column that has been chosen and can be currently seen on the table.

3. To *remove* a column, select the column name from the "Selected" box and click the < button.

4. In doing so, the column name will be moved from the "Selected" box to the "Available" box.
    a. In this case, the "Request Number" column was removed.

5. To **add** a column, select the column name from the "Available" box and click the > button.

6. In doing so, the column name will be moved from the "Available" box to the "Selected" box.
   a. In this case, the "Affected Pay Period" column was added.
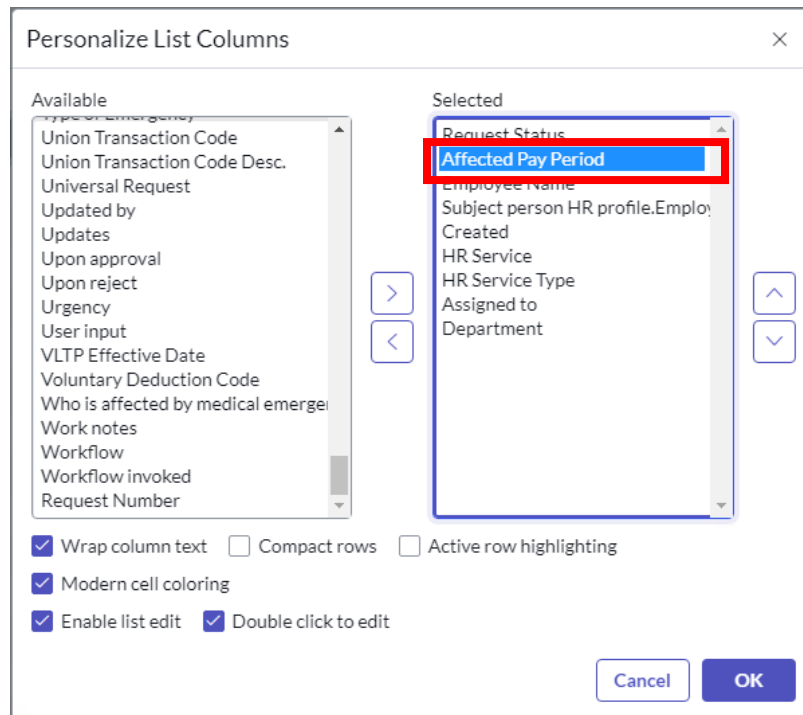
7. When you have finished customizing, click ok to confirm.
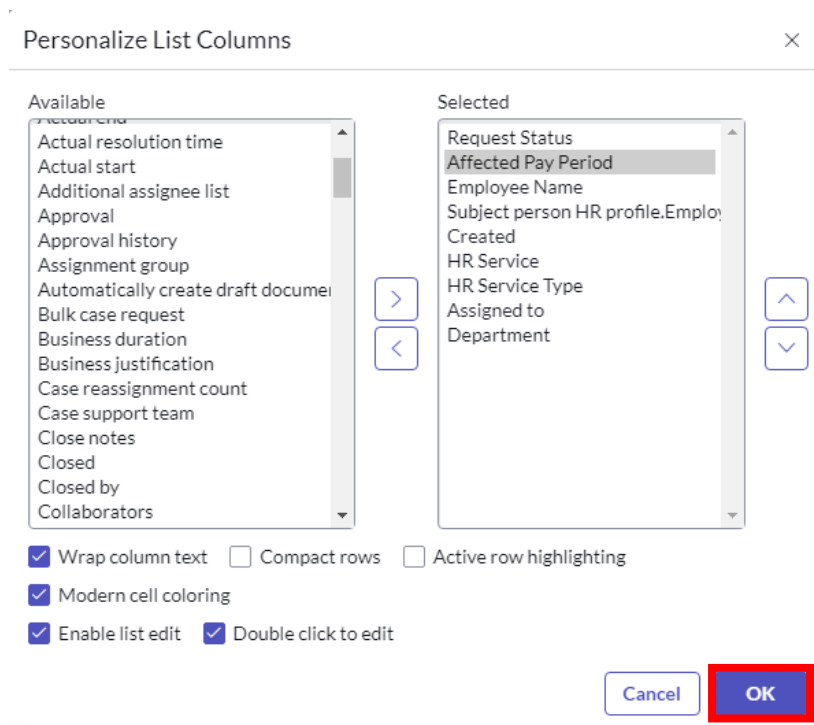
8. The table will now display the added/removed columns.
    a. In this case, the "Request Number" column was removed, and the "Affected Pay Period" column was added.

Organizing Column Headers

When personalizing column orders, **please note that your edits will not affect anyone else's view.** To organize the order of columns:

1. Click the gear icon in the top right corner to open the "Personalize List Columns" pop-up.

2. Click on a column name from the "Selected" box and use the up and down arrows located to the right of the "Selected" box to move the column further right or left of the table.
    a. **Please note that clicking the *up* arrow pushes the column to the *left side* of the table, while clicking the *down* arrow pushes the column to the *right side* of the table.**

3. When you have finished customizing, click ok to confirm.

4. The table will now organize the columns in the format you'd like.
   a. In this case, the "Request Number" column was moved to be the fourth column.

Sorting Columns

When personalizing column orders, **please note that your edits will not affect anyone else's view.** To sort columns:

1. Hover over the column name that you'd like to sort. In doing so, 3 dots should appear. Click those dots.

2. Click "Sort (a to z)" to sort the column by ascending order.

3. Click "Sort (z to a)" to sort the column by descending order.

Search function

To filter through cases using keywords, use the search function. To do so:

1. Click the magnifying glass icon in the top left corner. In doing so, search fields will appear under each column title.

2. Type a keyword into the search field for any column you wish to sort through.

3. In doing so, the table will filter to all the values that contain that search term.
   a. In this case, the table has been filtered to all cases with a "Military Pay" HR Service.

Asterisk Shortcut

To optimize your searches within the Payroll Case table, you can search through all values that contain the search term of your choosing. To do so:

1. Click the magnifying glass icon in the top left corner. In doing so, search fields will appear under each column title.

2. Type a specific keyword term for the field that you wish to search for and add an asterisk (*) in front of the search term that you are looking for.

3. In doing so, the system will search through all the values that contain that search term.
   a. In this case, "April" was entered into the Employee Name field to find all cases for April May.

Condition Builder

Within the Payroll Cases table, you can use the Condition Builder to build "and/or" conditions to filter a table. To do so:

1. Click on the filter icon located in the top left corner. Upon clicking that, the Condition Builder will appear below.

2. In the first dropdown list, select a field.

3. In the second dropdown list, select an operation.

4. In the third dropdown list, select a value.

5. Click the "Run" button to apply the conditions, filter the table, and find your desired cases.

   a. In this example, the conditions have been applied to filter to all cases with an Employee Name of "Have Powell."

6. If you'd like to **add additional conditions**, click the "And" button. Once you click "And," repeat Steps 2-4 in the second line.

7. Once you've entered all additional conditions, click "Run" and the conditions will be applied, and the table will be filtered to your desired cases.
   a. In this example, the conditions have been applied to filter to all cases with an Employee Name of "Have Powell" **and** "Pay Documents" HR Service.

8. If you'd like to *expand your search to cover different layers of conditions*, click the "Or" button. Once you click "Or," repeat steps 2-4 in the additional lines.

9. Once you've entered all additional conditions, click "Run" and the conditions will be applied, and the table will be filtered to your desired cases.
   a. In this example, the conditions have been applied to filter to all cases with an Employee Name of "Have Powell" **and** "Pay Documents" HR Service *or* "Debt Management" HR Service.

Breadcrumbs

To track what filters have been applied to the table, you can view refer to the top left corner where the filter conditions will be listed in purple.

1. In this case, you can see that the table has been filtered to all cases with a Military Pay HR Service.

Clearing Filters

Applied filters can be easily cleared from the table. To do so:

1. Click the filter icon in the top left corner. Upon clicking that, the Condition Builder will appear below will the current filters applied.
   a. In this case, you can see that the table has been filtered to all cases with a "Military Pay" HR Service.

2. Click the red "X" button, then click the "Run" button.

3. In doing so, all filters will be cleared from the table.