General Payroll Intake Job Aid:

Field HR Specialist

September 2022

Document Control Information History

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

Document Information

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Document Edit History

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 Field HR Specialists to initiate payroll requests on behalf of TSA employees. The following will highlight the various steps Field HR Specialists will need to navigate when using ServeU, including all screens, buttons, and fields they will interact with as they initiate a request.

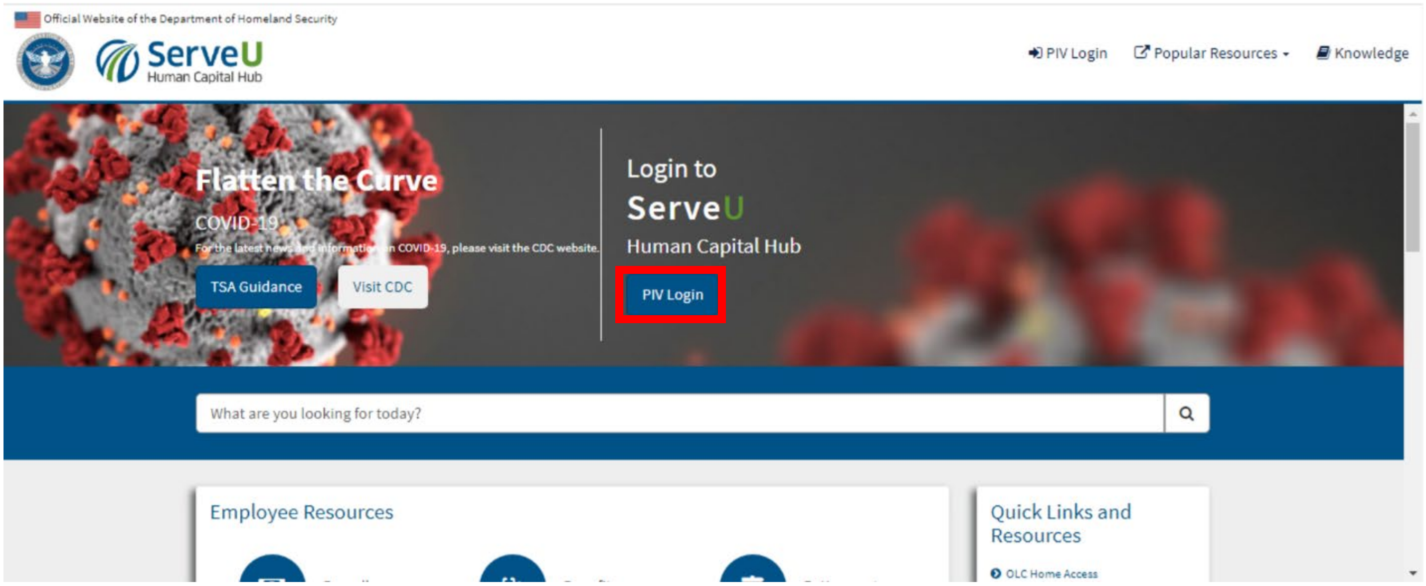
Roles & Responsibilities

Field HR Specialists will be responsible for initiating payroll requests on behalf of TSA Employees or for themselves. They can initiate requests either through Employee Profiles using the “My Team” page or the “Initiate Request” button located on the ServeU homepage.

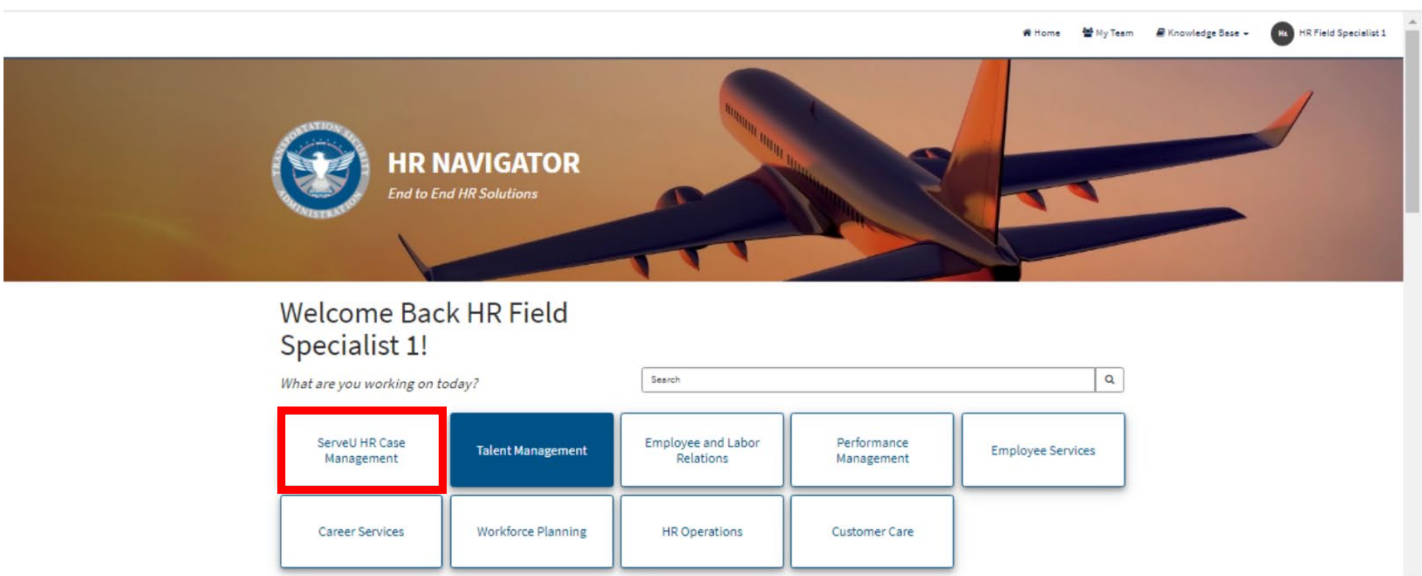
Initiating a Payroll Request

Initiating a Payroll Request via Employee Profile

1. Navigate to https://hcec.tsa.dhs.gov, click "PIV Login," and log into ServeU using your PIV card.

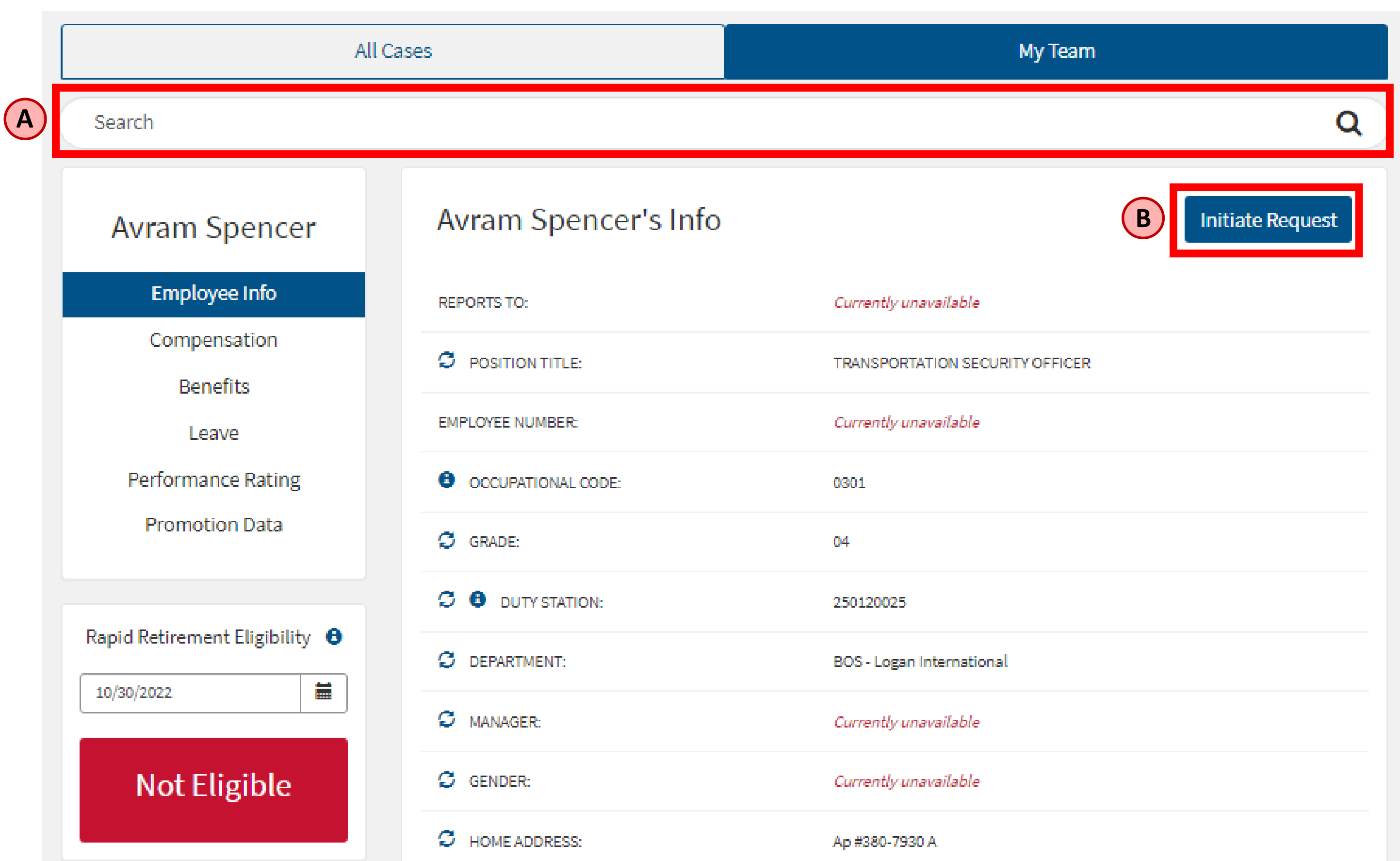


2. Once on the ServeU HR Navigator, click on the "ServeU HR Case Management" tile.

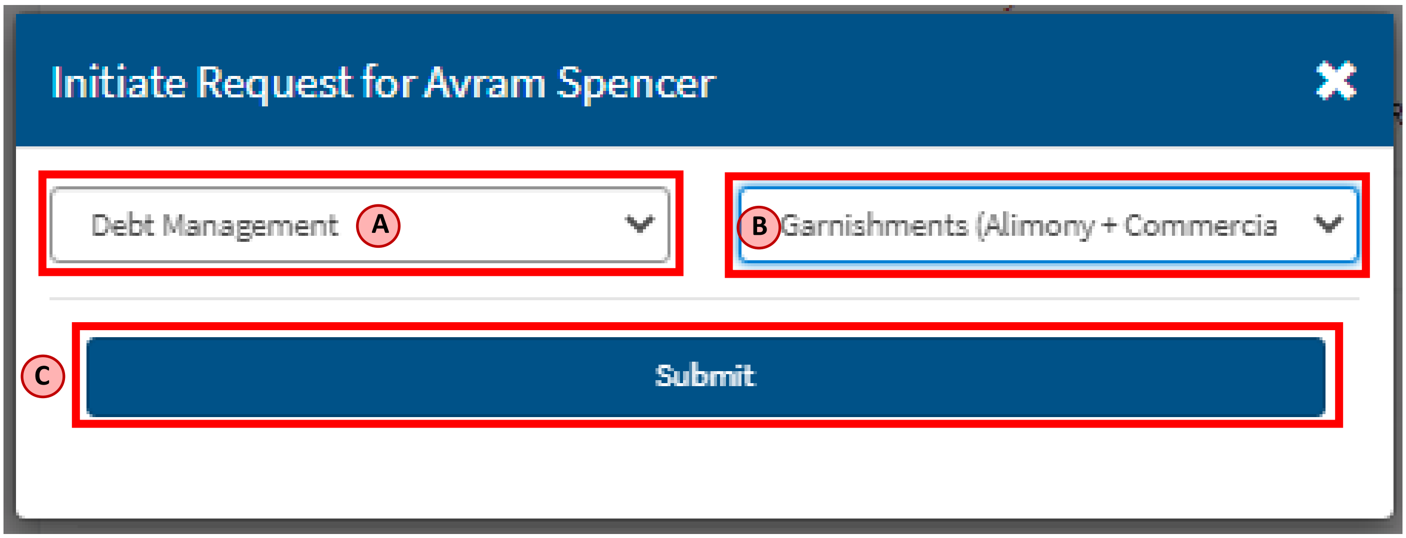


3. To create a payroll request for a specific employee:
    a. Click "My Team" at the top right of the screen.
    b. Once on the "My Team" page, click on the "My Team" tab, next to the "All Cases" tab.

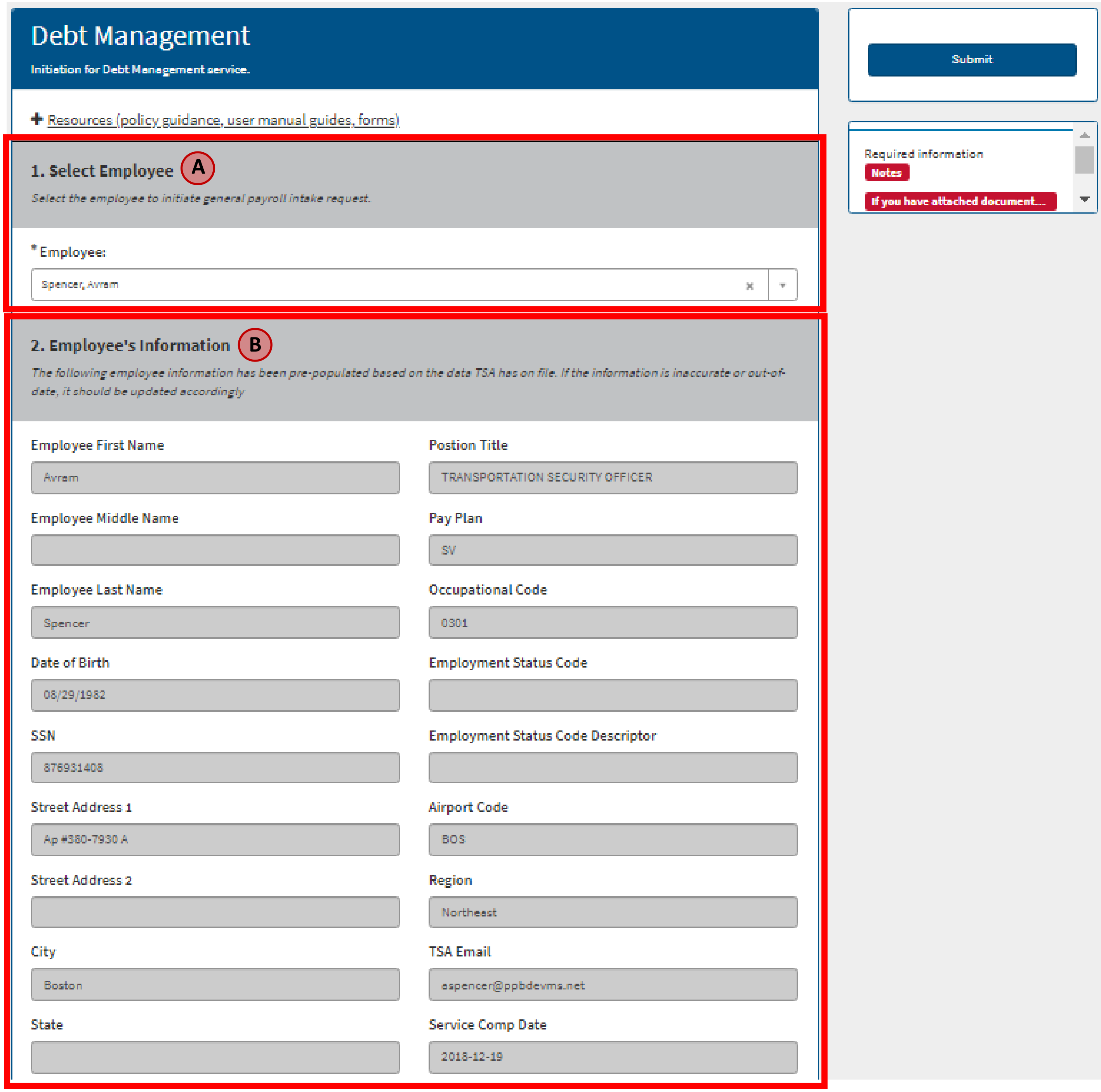
4. To find an employee's profile:
    a. Type in the employee's name that you are submitting a payroll request for in the search box.
    b. In doing so, you will be redirected to the employee's profile page. Click the blue button at the top right that reads "Initiate Request."



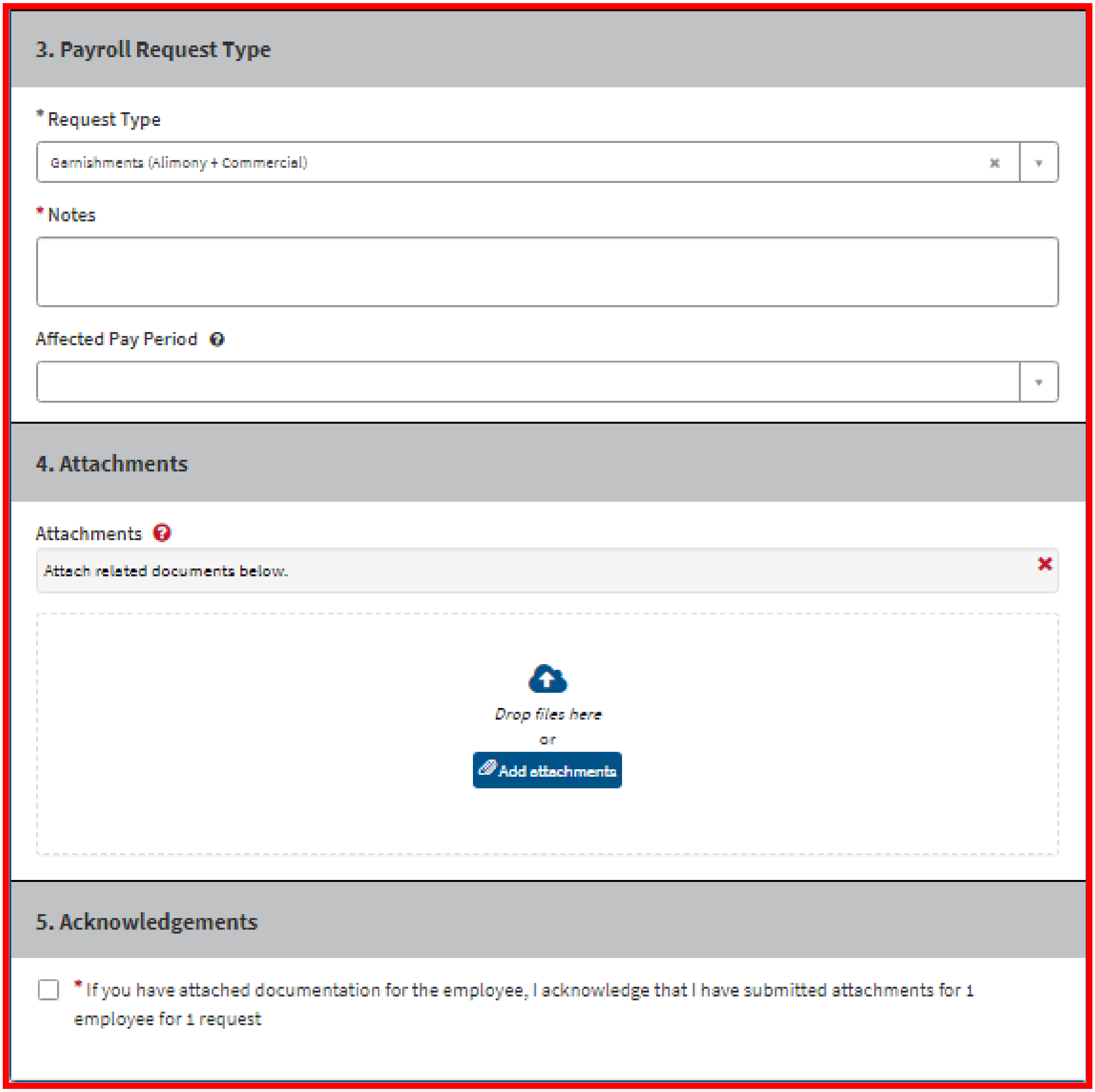
5. A pop-up box will appear with two drop-down boxes.
    a. In the first drop-down box on the left, select the HR service that you'd like to make a request for.
    b. In the second drop-down box, select the corresponding HR Service type you'd like to make a request for.
    c. Once you've selected both HR Service and HR Service type, click the blue "Submit" button.



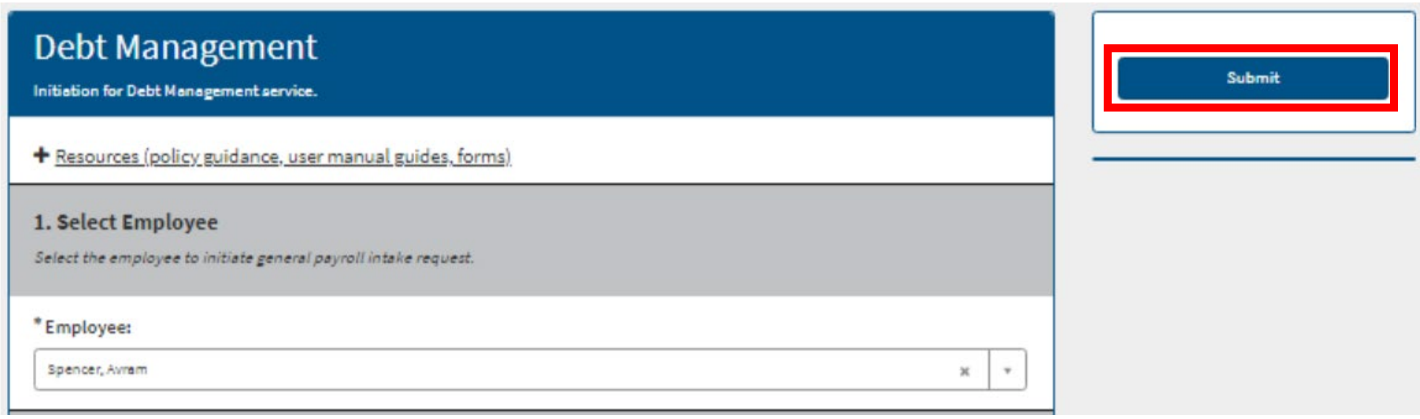
6. Upon selecting "Submit," you will be redirected to a payroll request form for the designated employee.
    a. In Section 1, "Select Employee," the employee's name will auto-populate.
    b. In Section 2, "Employee's Information," the following data fields will automatically populate: Employee First Name, Employee Middle Name, Employee Last Name, Date of Birth, SSN, Street Address, City, State, Position Title, Pay Plan, Occupational Code, Employment Status Code, Employment Status Code Descriptor, Airport Code, Region, TSA Email, Service Comp Date, Entrance on Duty Date, Personnel Office Identifier, and Tour of Duty Hours.
    c. **Please note that this information will be grayed out and non-editable.**



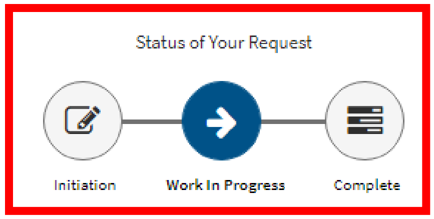
7. Fill in remaining required fields in Sections 3-5: “Payroll Request Type,” “Attachments” and “Acknowledgements.”
    a. **Please note that all required fields will be denoted by red asterisks, as well as listed at the top right of the page in the “Required Information” box.**

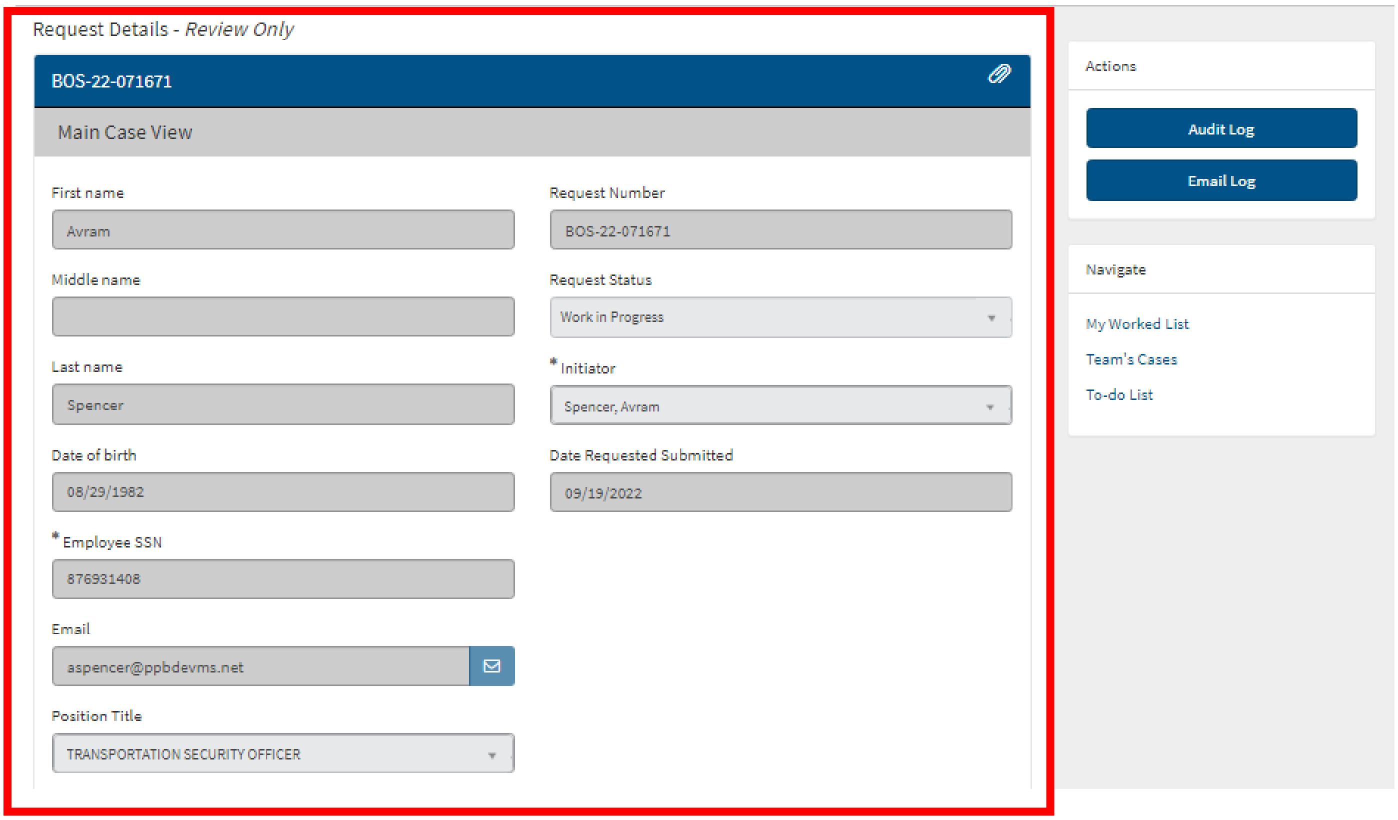


8. Once all the remaining required fields have been completed, click the blue "Submit" button at the top right corner.
    a. **Please note that an arrow in a red circle will be located at the bottom right corner of the page. Once clicked on, the page will jump back to the top, allowing you to easily navigate to the "Submit" button, rather than scroll through the page.**



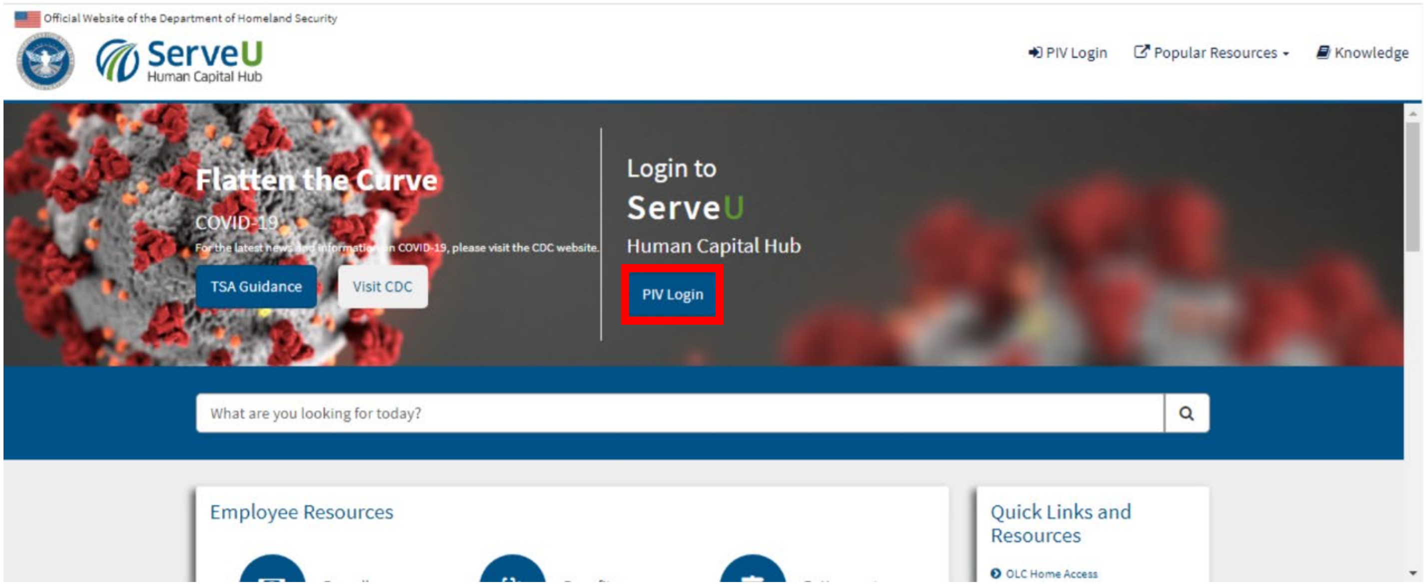
9. Once submitted, you will be redirected to the request details review page, where a tracker will be displayed at the top of the page. The case will now be in the "Work in Progress" stage for the Payroll Processors to pick up and process.
    a. **Please note that all fields in the following sections will be grayed out and un-editable: Main Case View, Payroll Request Type, Employee Information, and Contact Information. In the Comments and Work Notes section, you will see in the history that the case has been created and initiated. If you have forgotten to submit any details when you originally submitted your request or need to update the request with more information at a later date, you can submit a Work Note in this section. The Processing team will immediately be able to view this note and reply as necessary.**



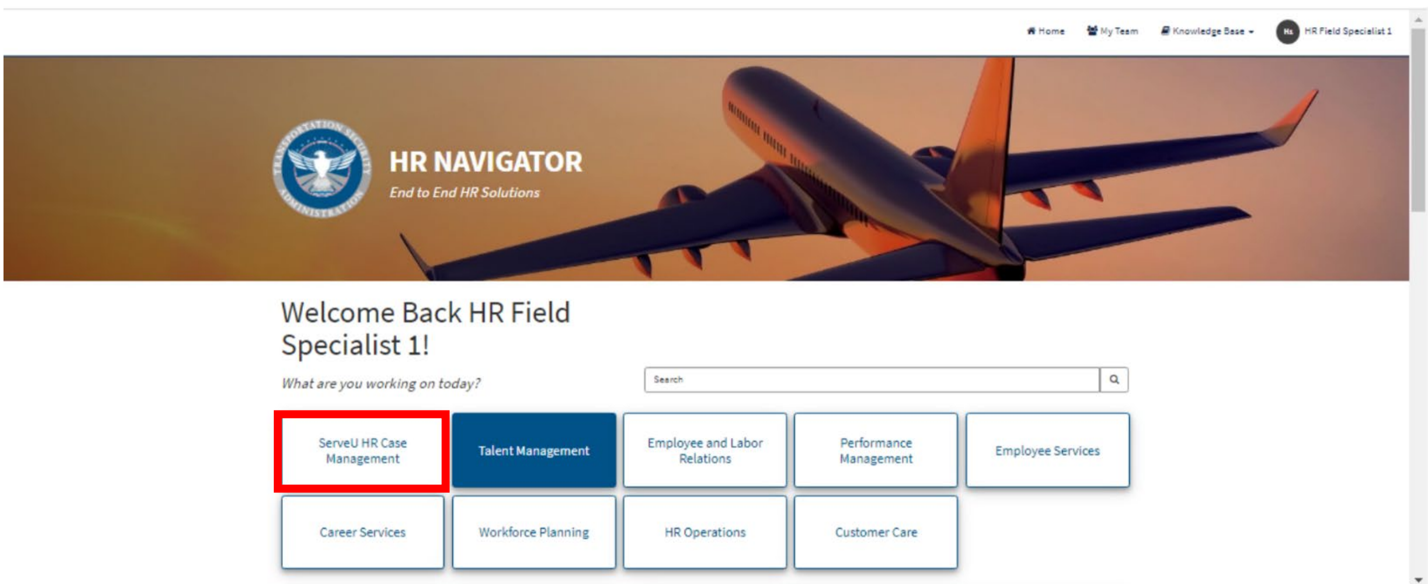


Initiating a Payroll Request via "Initiate Request"

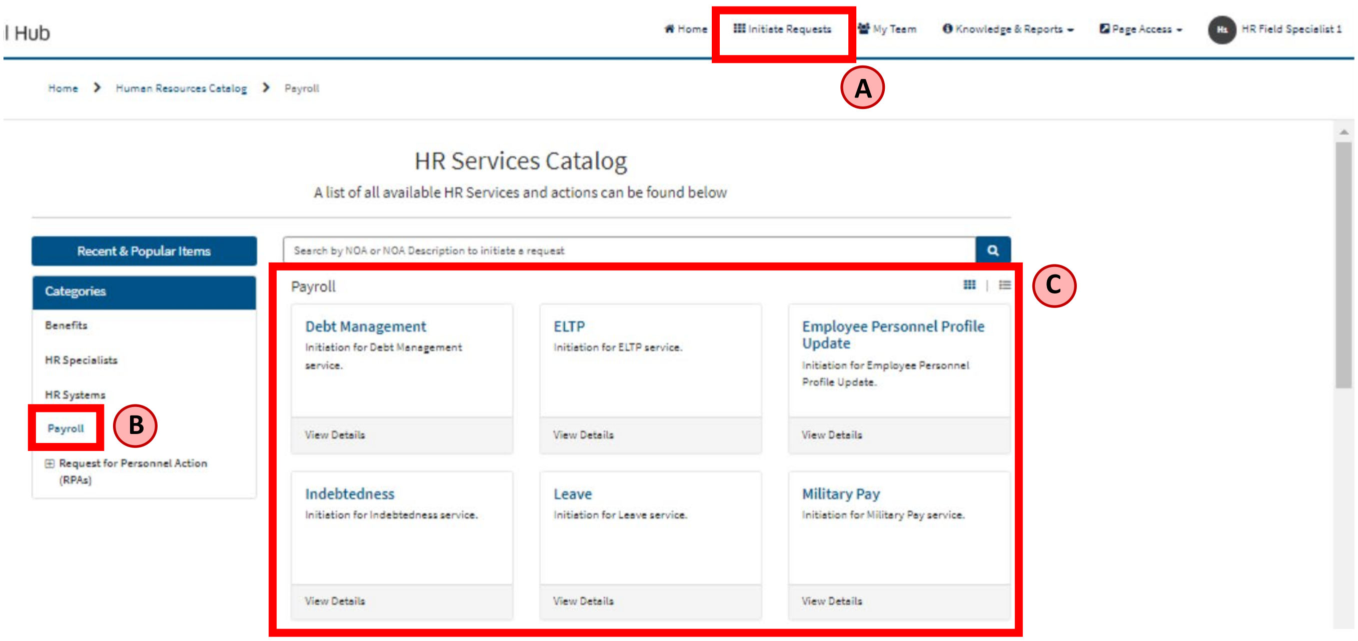
1. Navigate to https://hcec.tsa.dhs.gov, click "PIV Login," and log into ServeU using your PIV card.



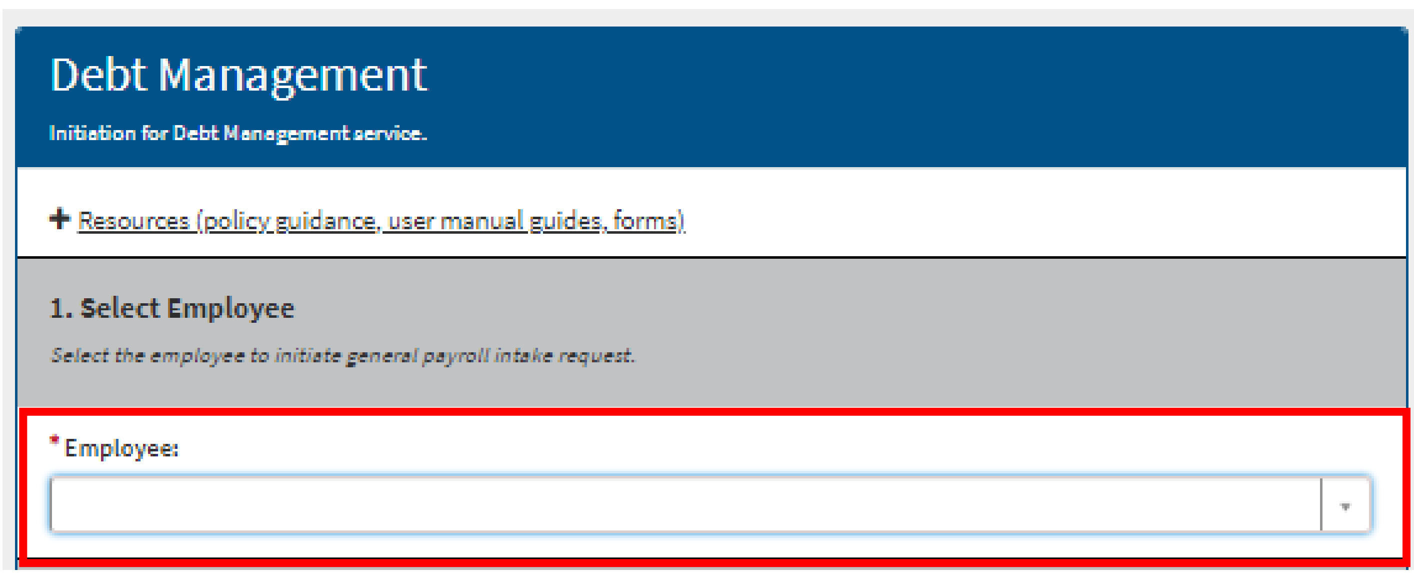
2. Once on the ServeU HR Navigator, click on the “ServeU HR Case Management” tile.



3. From there, you will be redirected to the ServeU homepage. To access all available payroll request options and initiate a request:
    a. Click “Initiate Requests” at the top of the screen.
    b. From there, you will be redirected to the HR Services Catalog. On the left-side pane, click on the “Payroll” category.
    c. In doing so, boxes will appear on the right side with all HR Services.



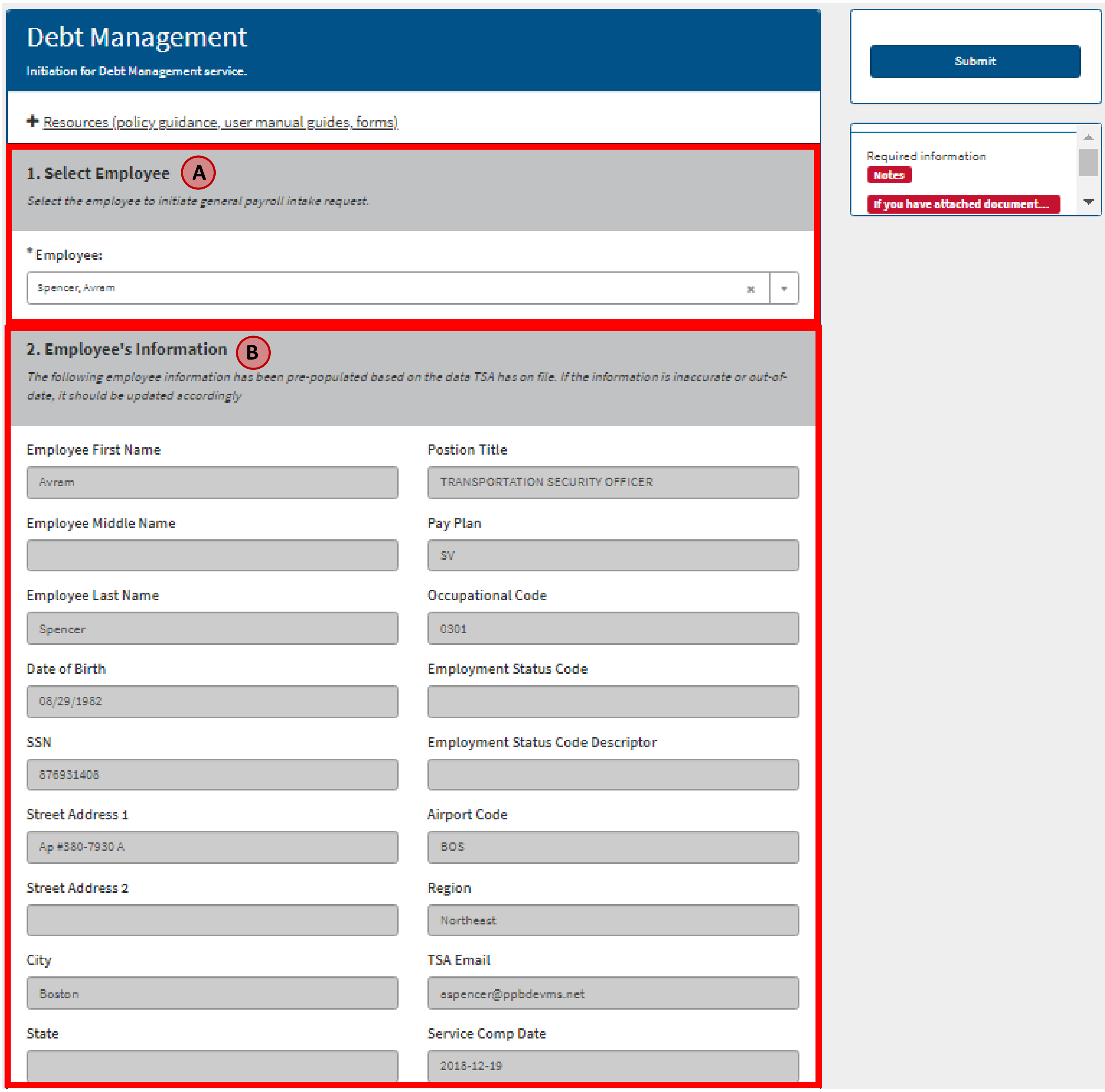
4. Select the HR service that you'd like to make a request for. From there, you will be redirected to a payroll request form.
    a. In Section 1, "Select Employee," click on the box and enter the employee that you'd like to make a payroll request for.



5. Once you've selected an employee, data fields will auto-populate.
    a. In Section 1, "Select Employee," the name of the employee you entered will auto-populate.
    b. In Section 2, "Employee's Information," the following data fields will be automatically populated: Employee First Name, Employee Middle Name, Employee Last Name, Date of Birth, SSN, Street Address, City, State, Position Title, Pay Plan, Occupational Code, Employment Status Code, Employment Status

Code Descriptor, Airport Code, Region, TSA Email, Service Comp Date, Entrance on Duty Date, Personnel Office Identifier, and Tour of Duty Hours.

c. **Please note that this information will be grayed out and non-editable.**



Debt Management

Initiation for Debt Management service.

+ Resources (policy guidance, user manual guides, forms)

1. Select Employee (A)

Select the employee to initiate general payroll intake request.

* Employee: Spencer, Avram

2. Employee's Information (B)

The following employee information has been pre-populated based on the data TSA has on file. If the information is inaccurate or out-of-date, it should be updated accordingly

Employee First Name	Avram	Postion Title	TRANSPORTATION SECURITY OFFICER
Employee Middle Name		Pay Plan	SV
Employee Last Name	Spencer	Occupational Code	0301
Date of Birth	08/29/1982	Employment Status Code	
SSN	876931408	Employment Status Code Descriptor	
Street Address 1	Ap #380-7930 A	Airport Code	BOS
Street Address 2		Region	Northeast
City	Boston	TSA Email	aspencer@ppbdevms.net
State		Service Comp Date	2018-12-19

Submit

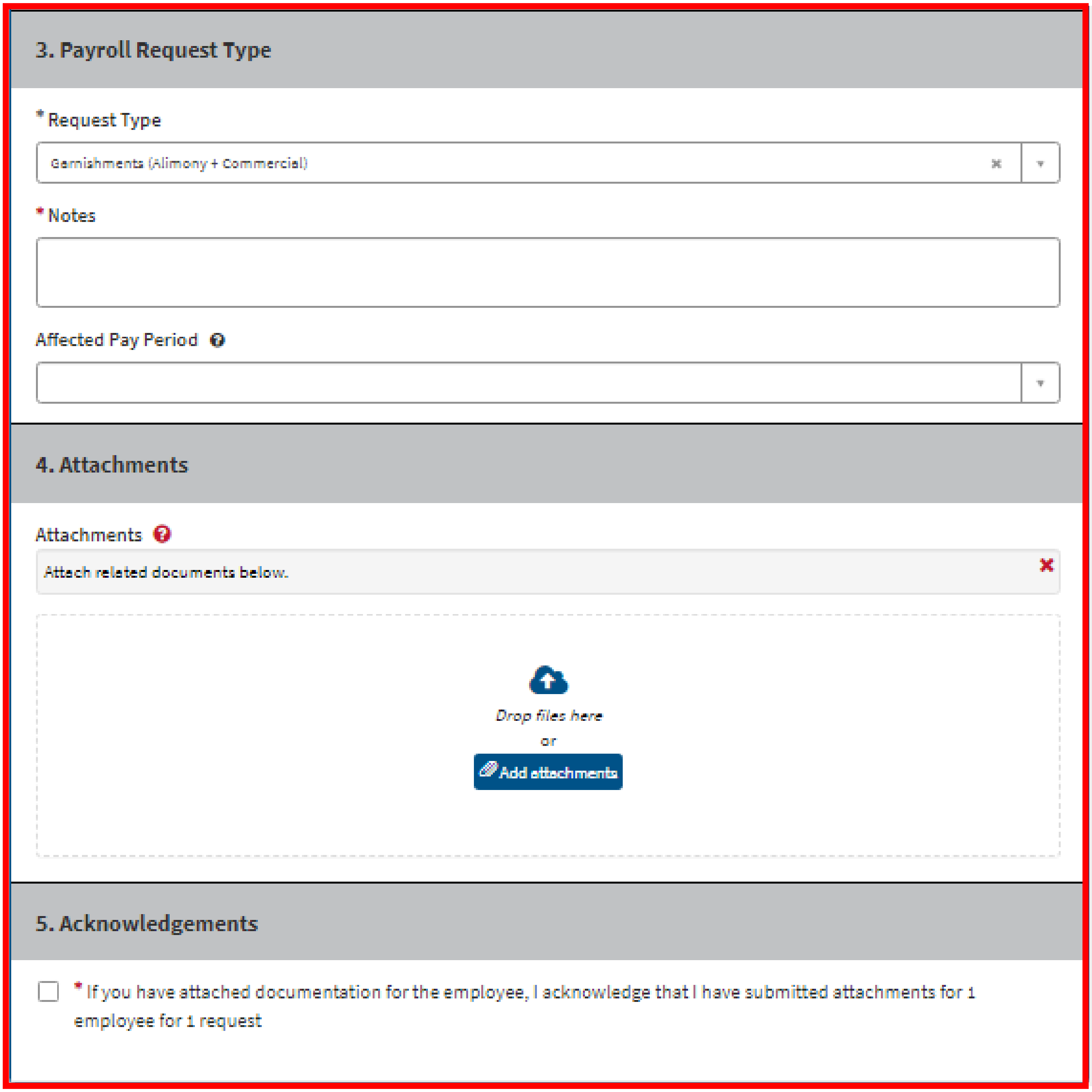
Required information

Notes

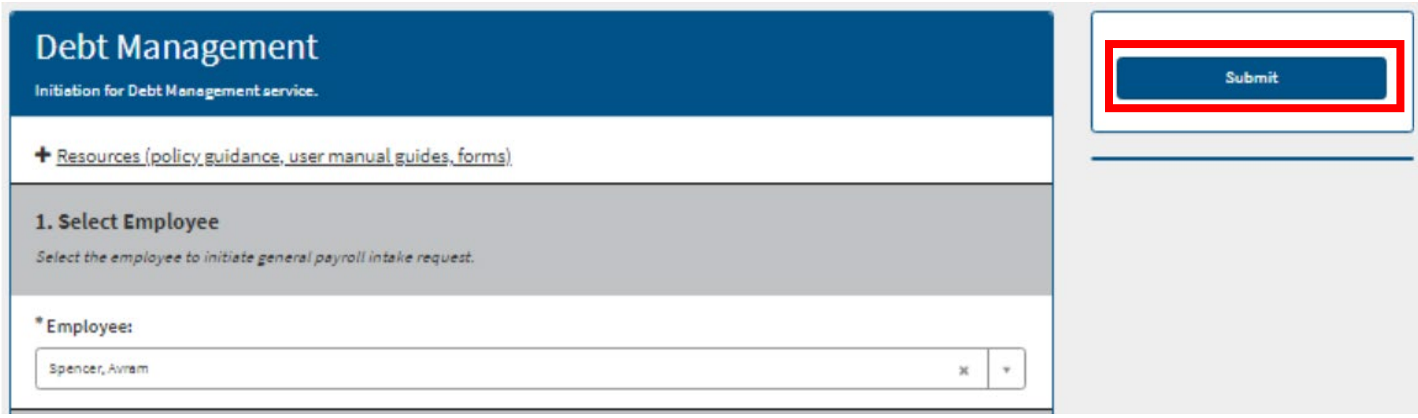
If you have attached document...

6. Fill in remaining required fields in Sections 3-5: "Payroll Request Type," "Attachments" and "Acknowledgements."

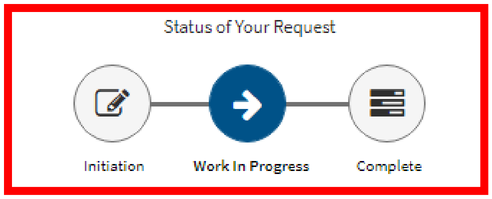
   a. **Please note that all required fields will be denoted by red asterisks, as well as listed at the top right of the page in the "Required Information" box.**

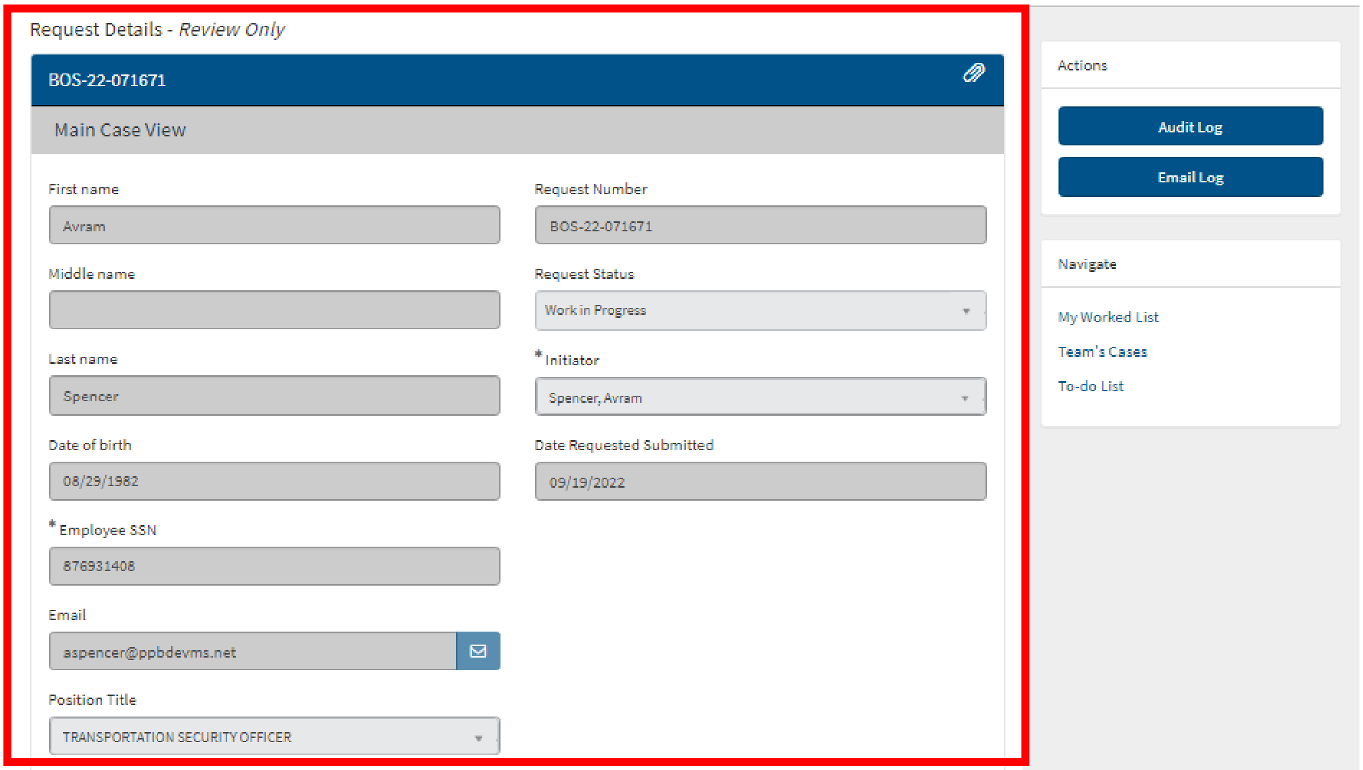


7. Once all the remaining required fields have been completed, click the "Submit" button at the top right corner.
   a. **Please note that an arrow in a red circle will be located at the bottom right corner of the page. Once clicked on, the page will jump back to the top, allowing you to easily navigate to the "Submit" button, rather than scroll through the page.**



8. Once submitted, you will be redirected to the request details review page, where a tracker will be displayed at the top of the page. The case will now be in the "Work in Progress" stage for the Payroll Processors to pick up and process.
    a. **Please note that all fields in the following sections will be grayed out and un-editable: Main Case View, Payroll Request Type, Employee Information, and Contact Information. In the Comments and Work Notes section, you will see in the history that the case has been created and initiated. If you have forgotten to submit any details when you originally submitted your request or need to update the request with more information at a later date, you can submit a Work Note in this section. The Processing team will immediately be able to view this note and reply as necessary.**

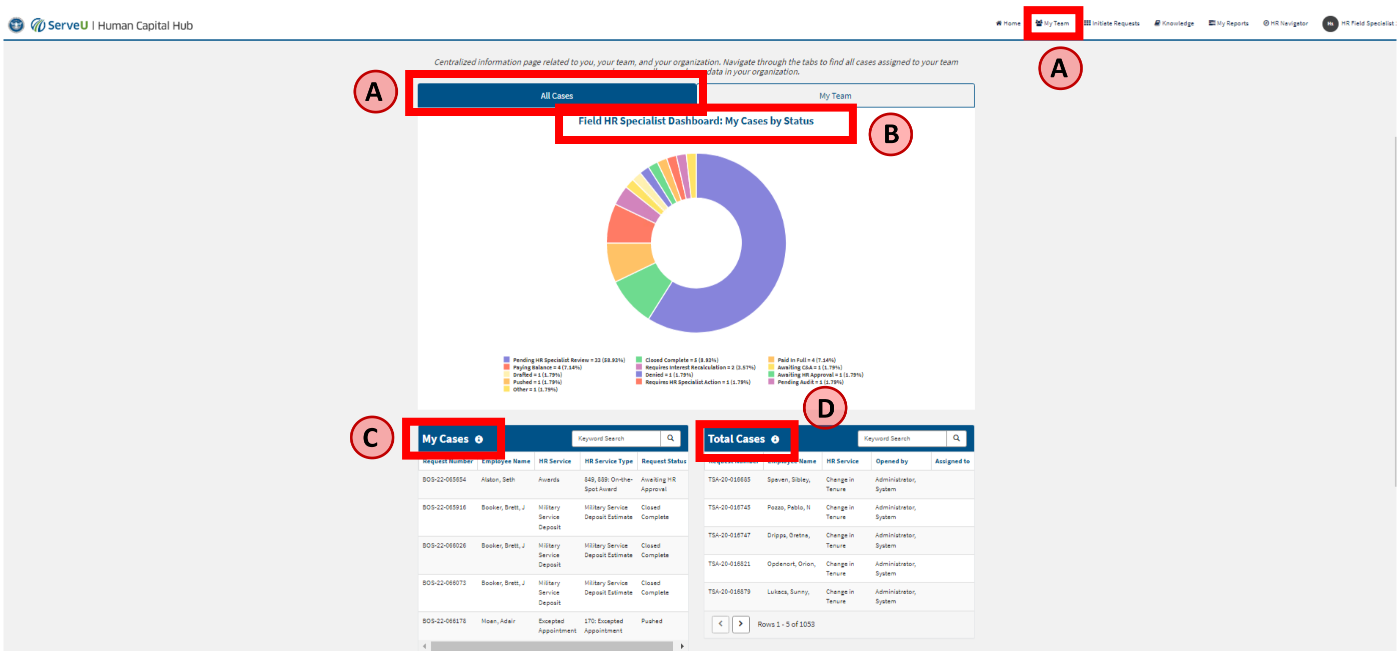




Field HR Specialist Dashboard

The Field HR Specialist Dashboard includes three components: My Cases by Status, My Cases, and Total Cases.

a) To access the Field HR Specialist Dashboard, click the "My Team" button at the top right corner, then select the "All Cases" tab.
b) **The Field HR Specialist Dashboard: My Cases by Status** provides a visual representation of all Payroll cases assigned to you broken down by request status.
c) The **My Cases** table includes all cases that you submitted for yourself or on behalf of another TSA employee.
d) The **Total Cases** table includes all cases submitted for employees that fall within your hub and spoke.



Appendix

Field Definitions Key

	Auto-populated field from NFC
	Initial formula output
	Manual override field

Highlighted Fields Key

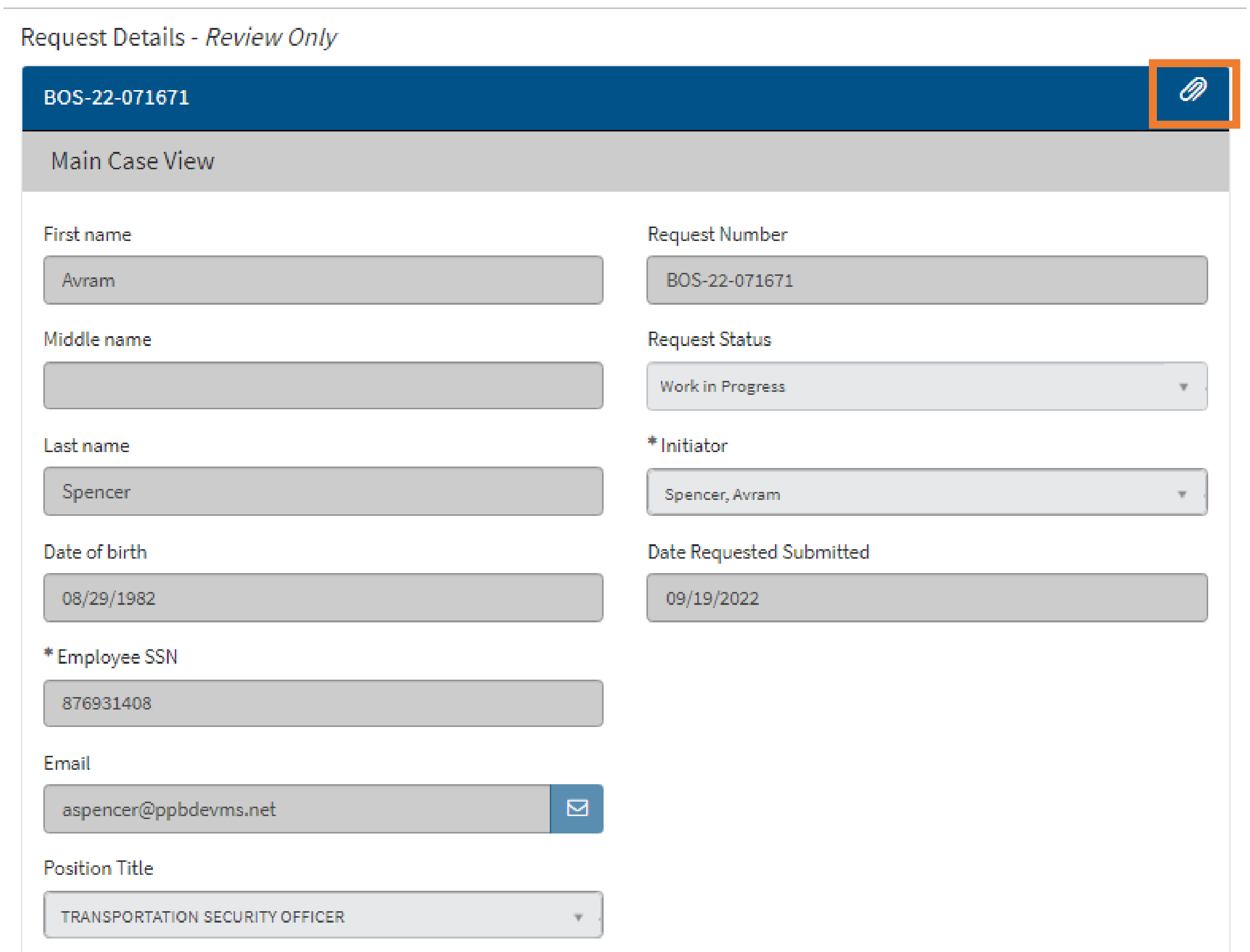
	Button
	Mandatory field
	Other

Main Case View Section

After a request has been submitted, you will be redirected to the request details page for review. The **Main Case View** section displays several general fields about the employee and their payroll request. In the top-right corner, there is a paperclip icon for Attachments.

Field Definitions:

First Name: Employee's first name	**Request Number:** Unique case number that is generated when the case is opened
Middle Name: Employee's middle name	**Request Status**: Status of the case
Last Name: Employee's last name	**Initiator**: Name of employee who created the case
Date of Birth: Employee's DOB	**Date Request Submitted:** Date the case was created
Employee SSN: Employee's SSN	**Assignment Group**: Processor group that the HR Payroll Team is mapped to
Email: Employee's email	**Assigned To**: Processor who the case is assigned to
Position Title: Employee's position title	

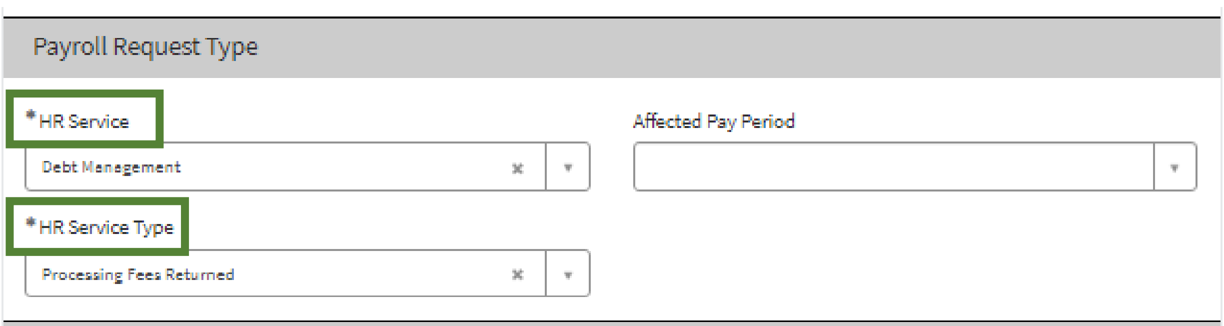


Payroll Request Type Section

After a request has been submitted, you will be redirected to the request details page for review. The **Payroll Request Type** section displays fields relevant to the payroll request being submitted on behalf of an employee.

Field Definitions:

HR Service: Ticket Category (i.e. Indebtedness, Debt Management, etc.)
HR Service Type: Ticket Subcategory (i.e. Tax Levies, Commercial Garnishment, etc.)
Affected Pay Period: Pay period that the payroll action will impact



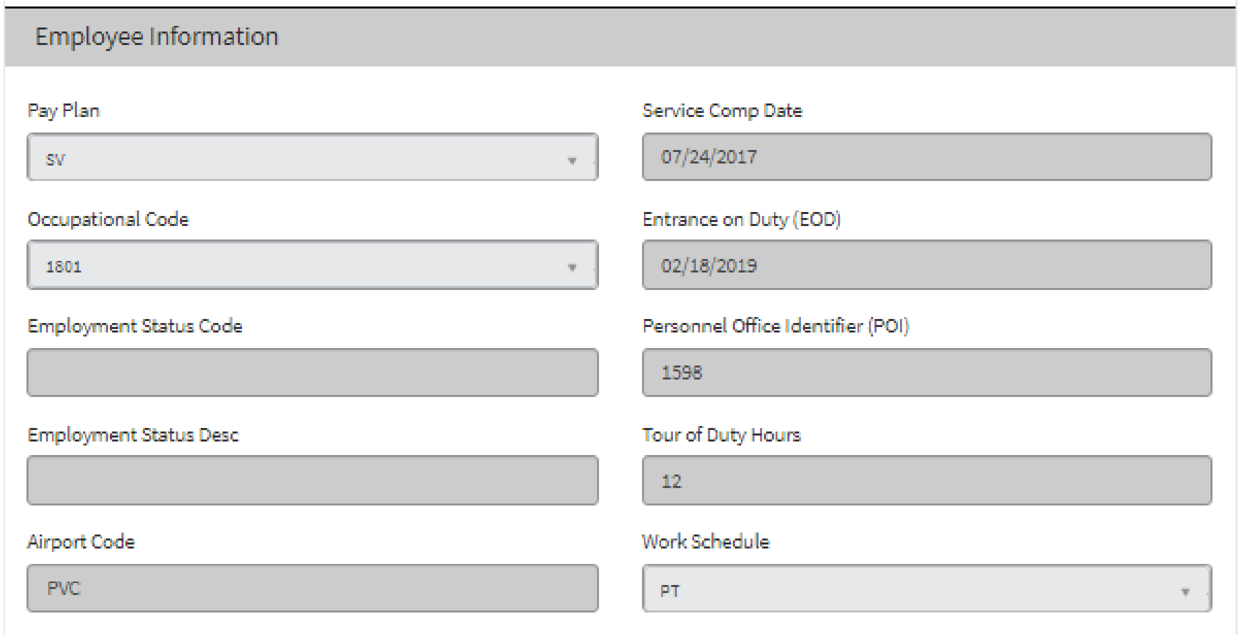
Employee Information Section

After a request has been submitted, you will be redirected to the request details page for review. The **Employee Information** section displays fields relevant to employee's unique information.

Field Definitions:

Pay Plan: Indicates which pay plan an employee is under (i.e., executive pay, non-executive pay)	**Service Comp Date**: A constructed or actual date that is used to determine benefits and is generally based on an employee's Federal Service tenure
Occupational Code: Employee's occupational series	**Entrance on Duty (EOD):** Date employee began serving TSA
Employee Status Code: Code to indicate an employee's status	**Personnel Office Identifier (POI):** A unique number that is assigned by OPM to identify a federal civilian personnel office that has authority to execute personnel actions

Employee Status Desc: Describes the employee's employment status (i.e., active, furlough, suspension, LWOP)	**Tour of Duty Hours:** Hour that constitute an employee's regularly scheduled work week
Airport Code: Employee's Airport Code	**Work Schedule:** Employee's work schedule type

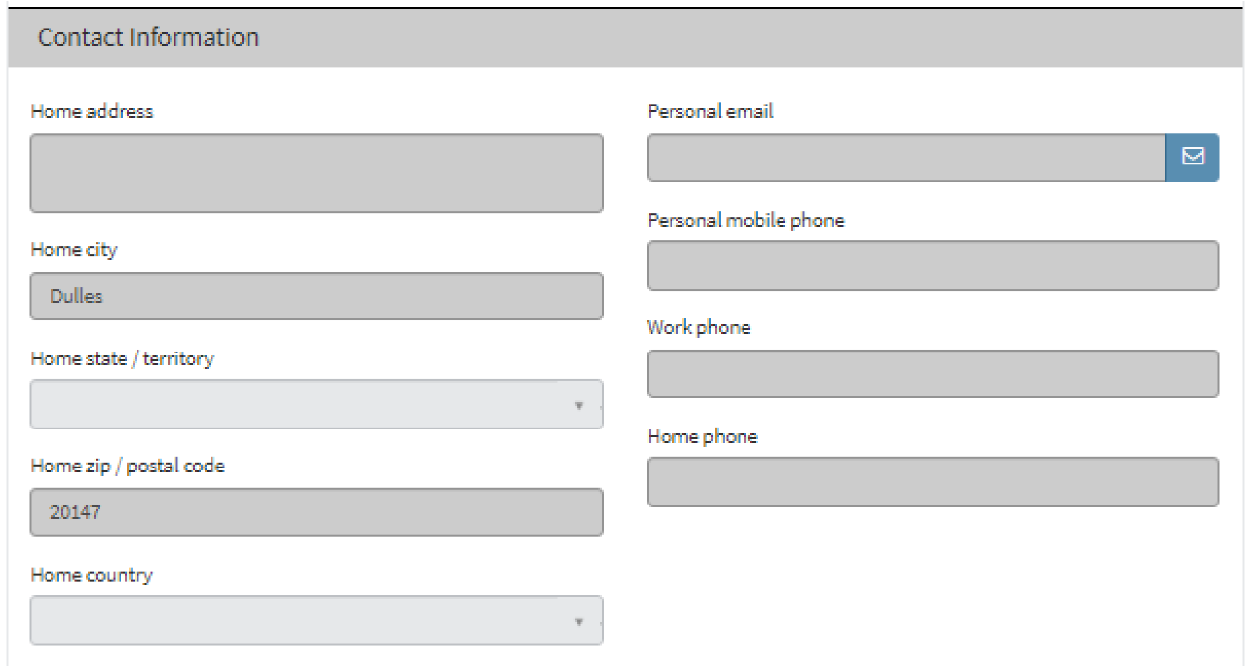


Contact Information Section

After a request has been submitted, you will be redirected to the request details page for review. The **Contact Information** section displays fields relevant to an employee's health insurance coverage, life insurance coverage, dental insurance coverage, and vision insurance coverage as pulled from NFC.

Field Definitions:

Home Address: Employee's residential street address	**Personal Email:** Employee's personal email address
Home City: Employee's city of residence	**Personal mobile phone**: Employee's personal mobile phone number
Home State/Territory: Employee's state of residence	**Work Phone**: Employee's work phone number
Home Zip / Postal Code: Employee's country of residence	**Home Phone**: Employee's home phone number
Home Country: Employee's country of residence	

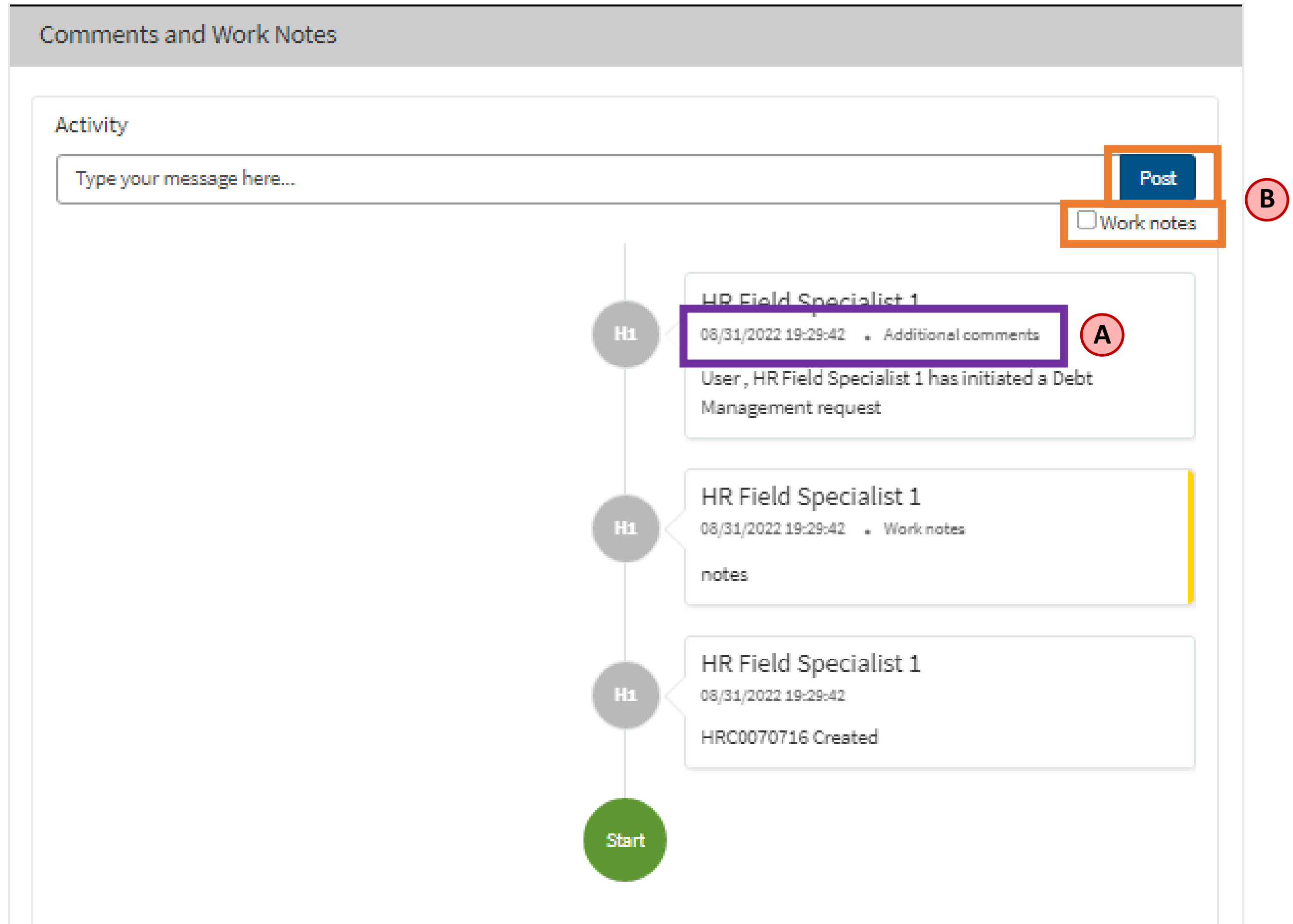


Comments and Work Notes Section

After a request has been submitted, you will be redirected to the request details page for review. The **Comments and Work Notes** section displays both the **Activity Stream and Work Notes** stream. If you have forgotten to submit any details when you originally submitted your request or need to update the request with more information at a later date, you can submit a Work Note in this section. The Processing team will immediately be able to view this note and reply as necessary.

a) The **Activity Stream** displays a chronological log of all changes made to the case including assignment changes, request status changes, automated emails sent to the employee, attachments included in the original request, and edits made to fields on the case view. The type of activity and timestamp are documented at the top of each activity data point.

b) To access the **Work Notes Stream**, click the checkbox next to "Work Notes," located under the "Post" button. Custom additional notes about the employee or case can be tracked here by writing them out in the text box and clicking the "Post" button.



Comments and Work Notes
Activity
Type your message here...
Post
Work notes
B
HR Field Specialist 1
08/31/2022 19:29:42 • Additional comments
A
User , HR Field Specialist 1 has initiated a Debt Management request
HR Field Specialist 1
08/31/2022 19:29:42 • Work notes
notes
HR Field Specialist 1
08/31/2022 19:29:42
HRC0070716 Created
Start