

Post Authorization Notification (PAN)

Report Options for Post Authorization Notification PAN

(*) - At least one of these fields must be selected.

1	Begin Time Stamp Date:	<input type="text" value="07/2003"/>		End Time Stamp Date:	<input type="text" value="07/2003"/>
2	Sort/Total:	<input type="text" value="Employee"/>			
3	Output Destination:	<input type="text" value="Screen"/>			
4	Control Point (*):	<input type="text"/>		<input type="button" value="Search"/>	
5	Department Code (*):	<input type="text"/>		<input type="button" value="Search"/>	
6	Title Code:	<input type="text"/>	To:	<input type="text"/>	<input type="button" value="Search"/>
7	Event:	<input type="text" value="ALL"/>			
8	Personnel Pgm Code:	<input type="text" value="PSS & MSP"/>			
9	Appt Type:	<input type="text" value="ALL"/>			
10	Title Unit Cd:	<input type="text" value="ALL"/>			
11	Appt Rep Cd:	<input type="text" value="ALL"/>			
12	Class Title Outline:	<input type="text" value="ALL"/>			
13	User Id:	<input type="text"/>			
14	User Name:	<input type="text"/>		<input type="button" value="Search"/>	

Search Button: If you are not sure of the entire number, type in a partial value and *click Search*. To choose a code from the list, *click* the code, or check the box in front of it and *click OK*.

Default values display for most criteria. Use the Down Arrow to see other selections.

The purpose of the Post Authorization Notification (PAN) report is to provide an audit trail of updates to the Employee Database (EDB) within the date range specified. It lists all changes to employee information that required mandatory review, such as changes to:

- Fund/DPA/Program/Fund Year
- Salary
- Appointments or distributions

This report may also be used to research departmental activity for specific types of database changes:

- Hires or rehires (HIRE Event)
- Separations (SEPR Event)
- Leaves of absence to verify end dates (LEAV Event)

Note: Use the PAN report as an alternative to reading individual PAN emails and to track and monitor monthly department activity instead of waiting for the Personnel Status Report.

Selection Criteria

Row	Prompt	Description
1	Begin Time Stamp Date End Time Stamp Date	Beginning and ending dates for selecting PANs. The default is the last closed period. Note: Time Stamp is the date the change was entered into the EDB.
2	Sort/Total	Employee (default) Sorted ascending by employee last name Dept Code, Employee Grouped by department code (ascending), then sorted by employee last name (ascending) Departments will probably use the Employee Name sort option, while central administrative units (Compliance, Accounting, Campus HR, etc.) will use the Department Code-Employee Name sort option.
5	Department Code (*)	6-digit Department Code
6	Title Code	Restricts the results to employees with a specific title code or within a range of title codes
7	Event	Type of update activity. Accept the default "All" or select a specific value to restrict the report to employees with that specific type of activity (for example, select APPT for a list of all employees with changes to appointments).
8	Personnel Pgm Code	Restricts the results to certain groups of employees (by Personnel Program Code): PSS & MSP - All non-academic staff, personnel program codes of 1 or 2 (default) PSS - Professional Support Staff, a personnel program code of 1 MSP - Management and Senior Professional Staff, a personnel program code of 2 Academic - Any title having a personnel program code of A All - All of the above
9	Appt Type	Accept the default "All" or restrict the report to a specified appointment type: 1 - Contract 2 - Regular/Career 3 - Casual 4 - Casual/Restricted 5 - Academic 6 - Per Diem 7 - Partial Year/Career
10	Title Unit Cd	Also known as bargaining unit. Accept the default "All" or use the drop down arrow to limit the report to a specific code.

Row	Prompt	Description
11	Appt Rep Code	Appointment Representation Code indicates whether the appointment is eligible to be represented by a union for collective bargaining purposes. This value is derived by the EDB: C - Covered S - Supervisor (uncovered) U - Uncovered
12	Class Title Outline	Accept the default "All" or restrict the report to a group of related title codes. This option is used almost exclusively by central administrative offices to review academic appointments.
12	User ID	User ID of a person authorized for OLPPS entry/update. Type in a User ID to restrict a report to updates made by a specific person.
13	User Name	If you do not know the User ID, you may enter a partial name ("last name, comma, first name" without spaces), and then click the Search button. Select the employee you are seeking from the list. If you enter a "%" sign in front of your partial name, the system will display a list of all employees with the partial value in the name.
<p>(*) At least one of the fields must be entered. You may also select pre-defined lists of Department Codes, Title Codes, Class Title Outline Codes, or Title Unit Codes. Create a list of codes when your selections are not in a contiguous range of values or when you have groups of codes you use repeatedly.</p>		

How Often

- Once a month to verify that all employee changes have been processed
- On an ad hoc basis, to verify end dates for leaves of absence or to confirm separations have been processed in OLPPS

Users

- Payroll officers, OLPPS processors, and managers

Key Things to Note

- If an employee had multiple events in the date range, there is a line for every event.
- When you drill down by employee name, you see all the PAN notices ever created for an employee.
- Some personnel actions do not create a PAN notice (for example, changes to personal information or next salary review date).

Post Authorization Notification (PAN) Example

Use the PAN report to review PAN notices as an alternative to reading individual PAN emails.

1. Select Post Authorization Notification from the Report & Tools menu or the Employee Data drop down menu (under Monthly Data Audit).
 - Change the **Begin** and **End Time Stamp Dates** to the current month.
 - Type in **Department Code**.
2. Click **Start**.

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(* - At least one of these fields must be selected.)

Start Reset

Change the **Begin** and **End Time Stamp Dates**.

Begin Time Stamp Date: 07/2003 End Time Stamp Date: 07/2003

Sort/Total: Employee

Output Destination: Screen

Control Point (*):

Department Code (*): 247584 Type the 6-digit code in **Department Code**.

Title Code: To:

Event: ALL

Personnel Pgm Code: PSS & MSP

Appt Type: ALL

Title Unit Cd: ALL

Appt Rep Cd: ALL

Class Title Outline: ALL

User Id:

User Name: Search

The default selection criteria have been set up to examine the largest possible population.

Since the default sort order was used, employees are listed alphabetically by last name.

Click an employee name to drill down to Appointments & Distributions detail for the employee. Use the Back icon to return to the report.

Center

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Post Authorization Notification PAN for 07/2003 To 07/2003 (CLOSED)

Pdf Excel

Row(s) 1 - 137 of 137

Employee Name	Employee ID	Dept Cd	Dept Cd Name	Hire Date	User ID	Event	Time Stamp	PPC	TUC	Appt Fp Cd	CTO	Prim Tit Cd	Title
[Employee Name]	247584	STOMATOLOGY		07/01/1984	SFPAYCT	APPT	07/24/2003	A	A2	C	010	1741	PROFESSOR-GENCOMP-B
[Employee Name]	247584	STOMATOLOGY		07/01/1984	SFPAYCT	APPT	07/25/2003	A	A2	C	010	1741	PROFESSOR-GENCOMP-B
[Employee Name]	247584	STOMATOLOGY		09/15/2000	SFSTOAG	APPT	07/25/2003	A	99	U	335	3279	ASST ADJUNCT PROFESSOR
[Employee Name]	247584	STOMATOLOGY		10/01/1997	SFSTOAG	APPT	07/25/2003	A	99	U	341	2057	ASST CLINICAL PROFESSOR
[Employee Name]	247584	STOMATOLOGY		07/12/2001	SFSTOAG	PIEC	07/02/2003	A	99	U	341	2050	ASST CLIN PROFESSOR-FI
[Employee Name]	247584	STOMATOLOGY		09/01/1975	SFSTOAG	APPT	07/07/2003	A	99	U	341	2057	ASST CLINICAL PROFESSOR
[Employee Name]	247584	STOMATOLOGY		07/01/1980	SFSTOAG	APPT	07/03/2003						
[Employee Name]	247584	STOMATOLOGY		09/01/1971	SFPAYCT	APPT	07/24/2003						
[Employee Name]	247584	STOMATOLOGY		09/01/1971	SFPAYCT	APPT	07/25/2003						
[Employee Name]	247584	STOMATOLOGY		11/17/1999	SFSTOTL	APPT	07/07/2003						
[Employee Name]	247584	STOMATOLOGY		11/17/1999	SFSTOTL	SEPP	07/07/2003						
[Employee Name]	247584	STOMATOLOGY		01/18/2002	SFSTOTL	APPT	07/21/2003						
[Employee Name]	247584	STOMATOLOGY		09/01/1991	SFPAYCT	APPT	07/16/2003						
[Employee Name]	247584	STOMATOLOGY		07/01/2003	SFSTOAG	HIR	07/17/2003						

Click an Event to drill down to PAN detail. Use the Back icon to return to the report.

PAN Detail

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PAN Detail

Appt/Dist | Appts | Dists | General | Personal | Benefits

Click on the hyperlink under "PAN Changes Summary" to see the details under "PAN Changes Detail".

Click here

PAN Changes Summary

----- < APPT > -----

*Action: 17 Appointment Renewal

*Action: 50 Other Distribution Action

+Term of Service: 10/01/97 to -06/30/03

+at % Time, effective 10/01/97 -06/30/03

PAN Changes Detail

Renewal of appointment effective 07/01/03-06/30/04.

----- < APPT > -----

Approved by [Name], Approved by [Name]

Employee Name: [Name] ID Number: [ID]

[Name] / 06/02/03, Approved by [Name] / 07/07/03.

(Dean's Office) 07/02/03, [Name] 7/07/03.

The following change to Appointment information has been recorded.

Hire Date: 10/01/97 Home Department: 247584 STOMATOLOGY

Exclusively Represented: No Next Rev. Dt-Typ: - Prob. Per. End:

Retirement: SFHB FICA: Medicare Only

BELI: 5-Not Elig BELI Eff. Date: 10/01/97

*Action: 17 Appointment Renewal

*Action: 50 Other Distribution Action

10) 2057 ASST CLINICAL PROFESSOR-WOS Dept: S/D STOMATOLOGY FLSA: Exempt

+Term of Service: 10/01/97 to 06/30/04 % Time: Grade: TUC: 99 LV: N

- 06/30/03

Personnel Program: Academic Appt Type: Academic Basis: Paid Over:

11) Pay Category: WOS-WITHOUT SAL Step:

+at % Time, effective 10/01/97, with an end date of 06/30/04

- 06/30/03

from account 2-401940- -19900- -0

To jump here

PAN Report Column Headings

For the most part, the columns are easy to understand. Listed below are explanation for some of the columns.

User ID	User ID of OLPPS administrator who updated the employee's information
Event	Type of update activity: APPT - Appointment/Distribution Change BENE - Benefits CITZ - Citizenship/Alien Data Change FICA - FICA/Retirement HIRE - Hire/Rehire INDL - Indefinite Layoff KEYC - Key Data Change LABR - Labor Relations LAYO - Layoff Data LEAV - Leave of Absence LVRT - Leave Return Date Change PIEC - Period of Initial Eligibility SABB - Sabbatical Usage SEPR - Separation WSPC - Work Study Change
PPC	Personnel Program Code: 1 - Professional and Support Staff or PSS 2 - Management and Senior Professional Staff or MSP A - Academic appointments
TUC	Title unit code (also known as bargaining unit) identifies employees who are represented by a bargaining unit and those who are non-represented: 99 - Non-represented CX - Clerical Staff, represented by CUE EX - Patient Care Technical Staff, represented by AFSCME HX - Health Care Professional Staff, represented by UPTE NX - Nursing Staff, represented by CNA RX - Research Staff, represented by UPTE SX - Service Staff, represented by AFSCME TX - Technical Staff, represented by UPTE
App Rp Cd	Appointment Representation Code indicates whether the appointment is eligible to be represented by a union for collective bargaining purposes. This value is derived by the EDB: C - Covered S - Supervisor (uncovered) U - Uncovered
CTO	Class Title Outline groups related title codes. This option is used almost exclusively by central administrative offices to review academic appointments. This field is not displayed in OLPPS.
Sep Cd, Reason, Date	Separation code, explanation, and date for separated employees