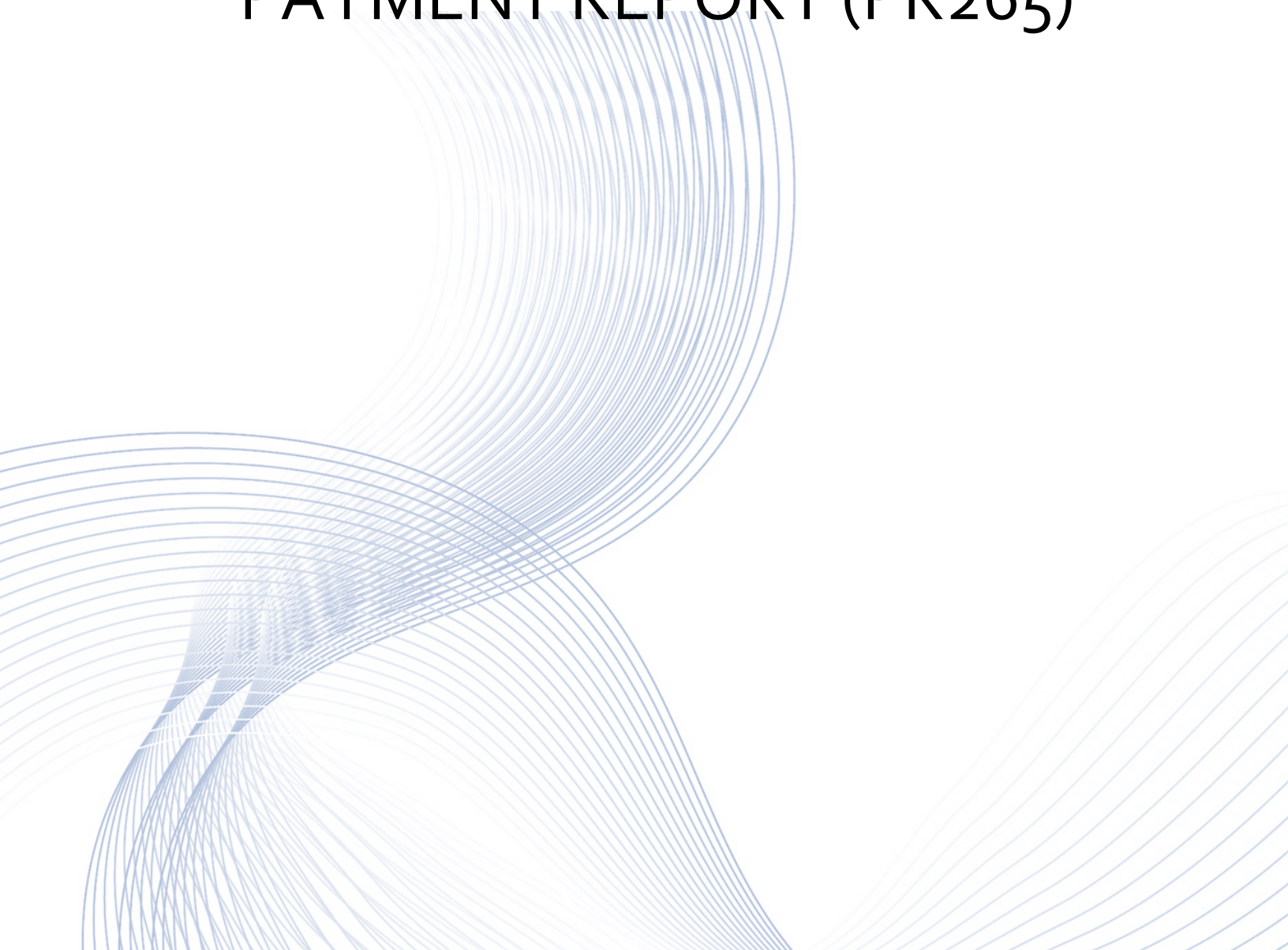


HRIS – Human Resources Information Solution

**RESOURCE GUIDE: AGENCY**  
**HCM VIEW - YEAR TO DATE**  
**PAYMENT REPORT (PR265)**



# AGENCY HCM VIEW - YEAR TO DATE PAYMENT REPORT (PR265)

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## Introduction

### Report Purpose

The Year to Date Payment Report (PR265) can be run to print a report of month-to-date, quarter-to-date, and year-to-date gross and net pay for Employees meeting the selection parameters.

### Report Criteria

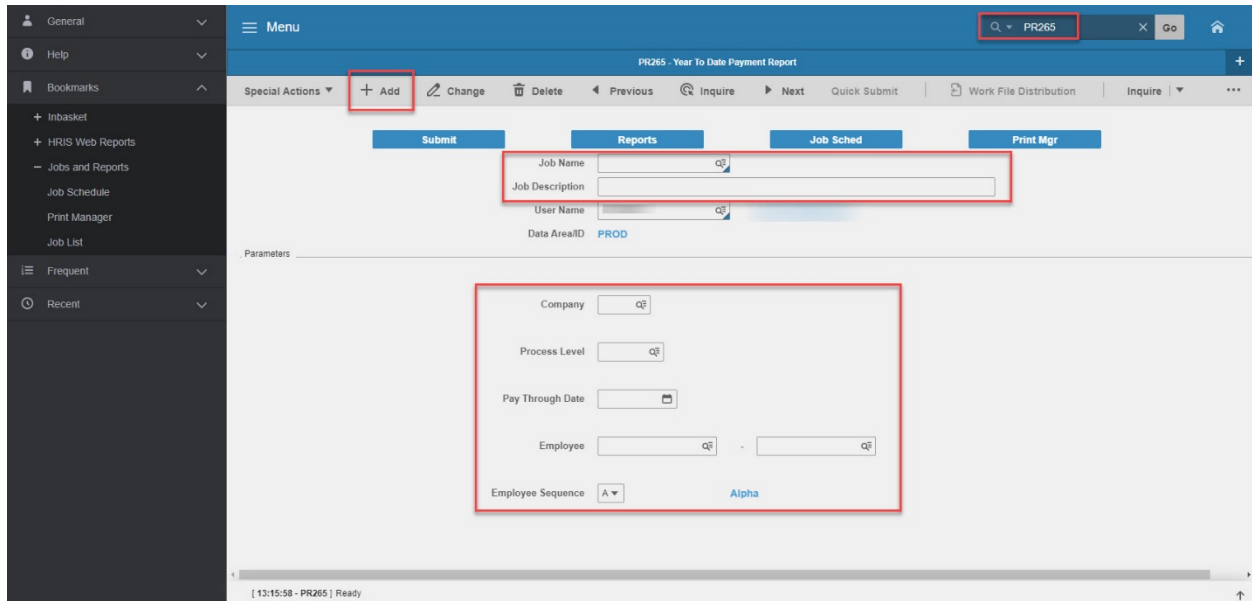
This report displays the gross and net pay for the Employee. The required fields to create the report are: Company, and the Pay Thru Date field. An Agency can restrict the results to a specific Process Level, or add Employee Number Ranges (can also be a single Employee).

### Report Content

The report results display the following information for each Employee: EIN, Name, Gross Pay (Month To Date, Quarter To Date and Year to Date), and Net Pay (Month to Date, Quarter To Date and Year to Date). This report DOES NOT display details of the payments.

## Year to Date Payment Report (PR265) – Parameters

(Image 1)



### Steps 1-9 of 16

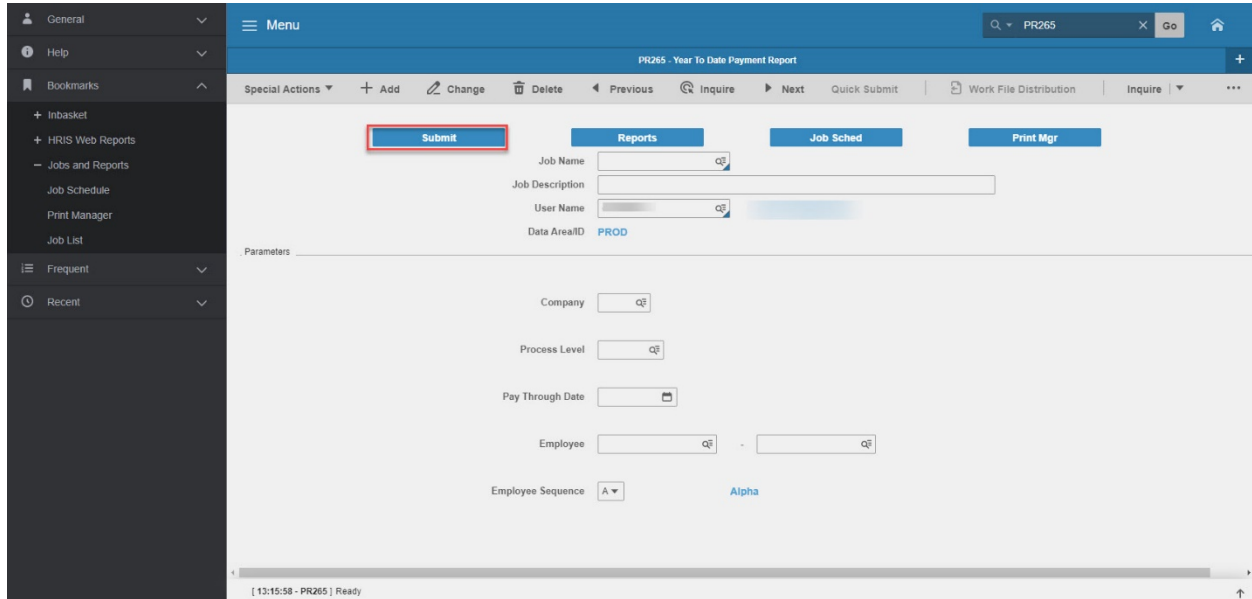
(Image 1, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>PR265</b> in the Search Box. Press Enter on the keyboard	The Year to Date Payment Report (PR265) will open.	
2	<b>Job Name</b> Field	R	Enter name of the job		Maximum 10 characters – NO SPACES • Valid Job Name: PR265PI100 • Invalid Job Name: PR265 PI100
3	<b>Job Description</b> Field	O	Enter description of the job		Maximum 30 characters Ex. PR265 FOR PI100
4	<b>Company</b> Field	R	Type '1' in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
5	<b>Process Level</b> Field	O	If applicable, type or select from the drop down menu the specific Process Level to include in the		If no Process Level is entered, the user will see all Process Levels he/she has access to view.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			report.  If no Process Level is desired, skip this step.		
6	<b>Pay Thru Date</b> Field	R	Type in the date to determine what payments to include in the year-to-date totals.		Date will be formatted: MM/DD/YYYY
7	<b>Employee</b> Field – Box 1 – Box 2	O	Box 1 – If applicable, type or select from the drop down menu the beginning EIN to include in the report.  Box 2 – If applicable, type or select from the drop down menu the ending EIN to include in the report.  If no specific EIN range is desired, skip this step.		If including only 1 Employee, type that Employee’s EIN number in the beginning and ending field.
8	<b>Employee Sequence</b> Field	O	For reports that will include multiple Employees, type or select from the drop down menu the sequence that should be used to sort the Employees.		Valid values include: <ul style="list-style-type: none"> <li>• ‘A’ – Alpha</li> <li>• ‘N’ – Numeric</li> </ul>
9	<b>Add</b> button	R	Click Add to save your report	See ‘Job Added’ in the lower left corner.	To see results you must submit the report to HRIS to process.

# Year to Date Payment Report (PR265) – Parameters

(Image 1)



## Steps 10-16 of 16

(Image 1, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	<b>Submit Job button</b>	R	Click Submit to process job. Job Submit pop-up will display. Click Submit button again.	Receive message "Job has been submitted".	You must have clicked 'Add' or 'Change' to save the report parameters in HRIS BEFORE clicking Submit.
11	<b>Job Scheduler link</b>  <b>Active Jobs</b>  <b>Waiting Jobs</b>  <b>Completed Jobs</b>	R	Click <b>Job Scheduler</b> to check the status of a job.  Click on <b>Active, Completed or Waiting</b> to see the status of your Job.	This will take you to the Job Scheduler. Use the job schedule to determine the current status of your job.  Queue refreshes automatically.  To be available for display, report job must	Job must be in Normal Completion and appear in the Completed tab to be available to view under the Print Manager.  You cannot view report results through the job scheduler, you can only view the status of the report job.  The filter options available are: • Active –your job is

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
				be in Normal Completion status.	<p>processing in HRIS.</p> <ul style="list-style-type: none"> <li>Completed – your job has finished processing and is ready for review</li> <li>Waiting – you job is waiting to be processed or may need recovery. If your job states ‘needs recovery’ contact HRIS for assistance.</li> </ul> <p>To see the results you must access the Print Manager bookmark.</p>
12	<b>Print Manager</b>	R	<p>Click on Print Manager to access report results:</p> <ul style="list-style-type: none"> <li>Reports – this queue will display all the reports you have processed.</li> </ul>	Print Manager will display your reports.	
13	<b>Report Name</b>	R	<p>Locate the row for the job you would like to view.</p>	All completed report jobs will be displayed in this queue.	
14	<b>Report Actions: View Print Delete</b>		<p>You can display report results one of two ways:</p> <ul style="list-style-type: none"> <li>Click anywhere on the display line for the report, click your right mouse button and select ‘View’ from the drop down menu.</li> <li>Or</li> <li>Click the select box at the beginning of the report line and click ‘View’ under related actions.</li> <li>Click Delete to delete the specific highlighted job.</li> </ul> <p>To delete multiple</p>	<p>Depending on the action performed, you will either see additional information, or be asked to confirm an action Delete. System will ask for confirmation to delete, Click <b>OK</b>. File is deleted.</p>	<p>You should never resubmit a job to process while that job is processing (it is in active or waiting status). Please allow the first job to process before resubmitting.</p>

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			jobs. All jobs must have a check mark in the select box to be included in the delete.		
15	<b>View Options</b> is to display your results in PDF format	R	Click on drop down and select the option for your report results.	Report results will open.	View Options, report results will display in a different format: Text will display in Excel Spreadsheet. PDF Landscape or Portrait will display in Adobe Acrobat. - PDF view will be used to print results or save the report to your hard drive. - PDF Condensed 158,
16	<b>Create CSV File</b> to display your results in a spreadsheet	O	Results will display in a Excel spreadsheet		Once in Excel you can save your report and manipulate your criteria.

## Results of Year to Date Payment Report (PR265), Report Image

(Image 2)

### Year To Date Payment Report

PR265	Date 01/26/20 Time 13:35	Company 1 STATE OF ARIZONA Year To Date Payment Report Thru 04/08/15	Page 1			
Employee Name	Gross Pay			Net Pay		
	Month To Date	Quarter To Date	Year To Date	Month To Date	Quarter To Date	Year To Date
	1,183.80	1,183.80	8,286.61	757.26	757.26	5,300.86
Totals Department	1,183.80	1,183.80	8,286.61	757.26	757.26	5,300.86
Totals Home Process Level	1,183.80	1,183.80	8,286.61	757.26	757.26	5,300.86