1.8 POST AUTHORIZATION NOTIFICATION (PAN)

Overview

The Post Authorization Notification (PAN) Subsystem is a means for informing a designated individual (i.e., a reviewer) that an update to an employee record has occurred and that it should be reviewed. The PAN provides information to the reviewer about a newly hired or rehired employee, or key information about changes to a current employee's record. This post review provides the necessary internal control mechanism to ensure that entries to the Employee Database (EDB) and Time Reporting entries are correct and appropriate.

A PAN is automatically generated for those transactions that have been predetermined to require review for internal control purposes (i.e., "events"). When an update to the EDB or a Time Reporting update is completed and data changes require a review for appropriateness, a PAN is sent to the reviewers who have been designated in the system (see subsection PAN Routing Criteria). As a result, the PAN Subsystem assures adequate separation of duties by requiring both a preparer and a mandatory reviewer for these transactions. (See subsection PAN Subsystem User.) Not all transactions will generate a PAN. For example, a change to title and pay requires review and will generate a PAN; a change to an employee’s home address does not require review and will not generate a PAN.

Note: This manual section covers the background and usage of Post Authorization Notifications (PANs) overall as well as the specific PAN usage and features in CICS. For information about viewing PANs on the web, see Section 9.3, Web-Based PAN.

The PAN Subsystem User

There are two types of users of the PAN Subsystem: preparers and reviewers. Each uses the system in a different way. Preparers are users who make changes to the EDB. They can add comments to the PAN about the update and can send the PAN to other users for informational review.

Reviewers are users who review EDB updates for correctness and appropriateness, or receive PANs for informational purposes. Reviewers access the PAN Subsystem to review PANs via either the CICS or web interface to PPS (see Section 9.3, Web-Based PAN for information about the web PAN interface). There are two types of reviewers:

Mandatory Reviewer -- designated in the system in advance. Checks EDB changes for correctness and appropriateness and is accountable for the transaction along with the preparer. Most transactions require review by a mandatory reviewer; if a mandatory reviewer has not been set up in the system to receive a PAN for a given transaction, the system will not permit the update to take place. Mandatory reviewers are responsible for reviewing changes to the EDB within two working days.

Non-Mandatory Reviewer -- can be set up in the system in advance to automatically receive a PAN upon EDB update, can be user initiated (i.e., the preparer enters a reviewer's PPS User ID at the time of update), or may receive a forwarded PAN from another reviewer. Non-mandatory reviewers receive PANs for informational purposes.
PAN Overview

Payroll/Personnel System
May 2003, University of California, Santa Cruz

PAN Routing Criteria

Each reviewer (mandatory as well as automatic, non-mandatory) will have information entered into the PPS designating the employee populations and payroll/personnel transactions about which they will be notified. The criteria utilized to determine the transactions an individual reviewer will receive are:

- **Department Code**
  (Distribution Department or Home Department)

- **Mandatory or Non-Mandatory status**

- **Employee Population**
  (Academic, Staff, and/or Student Employee)

- **Event**

- **Personnel Action Code**

Each of the criteria is described in some detail below.

Department Codes

The Department Code may either be the Home Department Code (i.e., denoting the Service Center) or the Distribution Department Code (Organization Level 4 of the Chart of Accounts), each of which is represented on the employee record. The Department Code will be utilized to limit the PANs for a Service Center and/or unit to its respective area of authority and purview. Normally, a reviewer would review PANs for the same area of responsibility for which they can review employee records using Inquiry.

Mandatory Reviewer

The responsibilities of the Mandatory Reviewer are provided in the Roles and Responsibilities section of this manual, section 1.2. Each automatic reviewer will be set up in the system as Mandatory or Non-Mandatory. It is possible for a reviewer to be designated as "Mandatory" for reviewing some events and "Non-mandatory" for other events.

Employee Populations

Characteristics of the employee record (i.e., the Appointment Type, the Program Type, and Student Status) are utilized to enable PAN distribution based on the employee population for which a Reviewer is responsible. For example, if a Mandatory Reviewer is only responsible for reviewing PANs for non-academic student employees, it is possible to exclude any PANs about staff and academic employees in the service center by selecting the student employment category. The employee populations are broadly categorized as Staff, Academic, and Student; and are further categorized as shown in the following table:

<table>
<thead>
<tr>
<th>Staff Employees</th>
<th>Academic Employees</th>
<th>Student Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sr. Managers</td>
<td>Ladder Rank Faculty</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Managers &amp; Sr. Professionals</td>
<td>Other Non-Student Academics</td>
<td>Graduate</td>
</tr>
<tr>
<td>Professional &amp; Support Staff</td>
<td>Graduate</td>
<td>Work-Study</td>
</tr>
<tr>
<td>Career Staff</td>
<td>Undergraduate</td>
<td>Non Work-Study</td>
</tr>
</tbody>
</table>
**Events**

An event which requires that an individual or office be notified may be characterized as follows:

- any change for which it has been determined the individual inputting the transaction should not assume sole responsibility for the impact of the change;
- any change which impacts data for which programmed data edits could not reasonably be implemented (e.g., a pay rate change).

Following are two lists of events for which it has been determined a notification is required – one for EDB actions and one for Time Reporting actions. For each event, the general trigger conditions (changes to the employee record) which define the event are described. Notifications will be generated whenever a value of a “trigger” data element is changed on an employee record, whether the value is explicitly changed by the user or implicitly changed (derived) by the PPS. There may be more than one event per employee record update, (e.g., there may be a Labor Relations notification along with an Appointment/Distribution notification for an employee reclassified to a position in another bargaining unit); notifications for two events will be combined into one PAN. It’s a good idea to process multiple changes to an employee record during a single update whenever possible; otherwise, there will be a PAN generated for each transaction (hint: use Bundles). A limited number of the following events will be the responsibility of a central office to prepare and/or review rather than a service center (e.g., Benefits, Key Data Change, Work Study Change).

<table>
<thead>
<tr>
<th>Event Code</th>
<th>Notification Event</th>
<th>General Trigger Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPT</td>
<td>Appointment/Distribution Change</td>
<td>Any appointment-level and/or distribution-level action code has just been recorded.</td>
</tr>
<tr>
<td>BENE</td>
<td>Benefits</td>
<td>A change to any Benefits insurance related data element. <em>(Units will not receive PANs for Benefits events unless combined with another event.)</em></td>
</tr>
<tr>
<td>CITZ</td>
<td>Citizenship/Alien Data</td>
<td>A change to the Citizenship Status code value, FICA Eligibility Code for non US Citizen, or change in value for any of the Visa/Tax Treaty data elements.</td>
</tr>
<tr>
<td>FICA</td>
<td>FICA/Retirement</td>
<td>A change to the FICA Eligibility Code value and/or Retirement System Code value.</td>
</tr>
<tr>
<td>HIRE</td>
<td>Hire/Rehire</td>
<td>Personnel Action Code 01 or 02 has just been recorded.</td>
</tr>
<tr>
<td>INDL</td>
<td>Indefinite Layoff</td>
<td>Personnel Action Code 06 and Separation Reason Code “CA” have been recorded.</td>
</tr>
<tr>
<td>Event Code</td>
<td>Notification Event</td>
<td>General Trigger Conditions</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>KEYC</td>
<td>Key Data Change</td>
<td>Employee ID has just been changed or a change to the Employee Name.</td>
</tr>
<tr>
<td>LABR</td>
<td>Labor Relations</td>
<td>A change occurs to any one of Employee Relations Code, Employee Representation Code, Employee Relations Unit Code, Employee Special Handling Code, or Employee Distribution Unit Code.</td>
</tr>
<tr>
<td>LAYO</td>
<td>Layoff Data</td>
<td>A change occurs to any one of the employee record Layoff data elements.</td>
</tr>
<tr>
<td>LEAV</td>
<td>Leave of Absence</td>
<td>Personnel Action Code 07, 08 or any change in value for any of the Leave of Absence-related data elements has just been recorded.</td>
</tr>
<tr>
<td>LVRT</td>
<td>Leave Return Date Change</td>
<td>Personnel Action Code 09 has just been recorded.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Code</th>
<th>Notification Event</th>
<th>General Trigger Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SABB</td>
<td>Sabbatical Usage</td>
<td>Personnel Action Code 07 or 09 has just been recorded on the employee record AND Leave of Absence Type Code value has just been changed to 01, 02, 03, or 14; OR, a change to any of the Sabbatical Credit data elements.</td>
</tr>
<tr>
<td>SEPR</td>
<td>Separation</td>
<td>Personnel Action Code 06 OR any Separation-related data element value has changed.</td>
</tr>
<tr>
<td>WSPC</td>
<td>Work Study Limit Change</td>
<td>A change to a Work Study Limit value has just been recorded.</td>
</tr>
</tbody>
</table>

**Time Reporting Actions**

<table>
<thead>
<tr>
<th>Function/Event Code</th>
<th>Notification Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDAP</td>
<td>Additional Pay</td>
</tr>
<tr>
<td>EDFT</td>
<td>One Time Payment</td>
</tr>
<tr>
<td>EDLR</td>
<td>Late/Reduce Pay</td>
</tr>
<tr>
<td>EDRA</td>
<td>Retroactive Pay</td>
</tr>
<tr>
<td>EDTS</td>
<td>Single Expense Transfer</td>
</tr>
<tr>
<td>EDTM</td>
<td>Mass Expense Transfer</td>
</tr>
</tbody>
</table>
Personnel Action Codes

The Personnel Action Code enables the distribution of a notification to an addressee who will review PANs pertaining to a specific personnel action(s) (e.g., reclassification, add stipend, appointment renewal, etc.). The personnel action code makes it possible to narrow the range of notifications generated for Appointment/Distribution Change Events. Normally, however, this criterion will be used only in the set-up of a non-mandatory reviewer. For mandatory reviewers it is more appropriate to use the Appointment/Distribution Change Event to ensure all transactions and resulting PANs of this Event type have a mandatory reviewer.
The CICS PAN Structure

PANs may consist of several pages. The following example shows a sample notification viewed in the Payroll/Personnel PAN Subsystem’s CICS interface.

Notification viewed online - Page 1 of 4

Notification viewed online - Page 2 of 4
**PPS Overview**

**PAN Sections**

PANs are comprised of the following five sections:

**Header and Employee and Preparer Information:** This section lists the name of the screen or bundle that was updated, who updated it, the name and ID associated with the employee record, and a brief summary of the action taken. (See *Notification Viewed Online - page 1*.)

**Comments:** This section includes comments entered by the preparer as well as any subsequent comments entered by reviewers. (See *Notification Viewed Online - page 1*.)

**General Information:** This section lists employee information not associated with appointment or distribution, indicating the specific data elements that were changed and the new data that was entered for the employee. (See *Notification Viewed Online - pages 1 & 2*.)

**Appointment and Distribution Information:** This section lists appointment and distribution information, indicating the specific data elements that were changed and the new data that was entered for the employee. (See *Notification Viewed Online - pages 2 & 3*.)

**List of Reviewers:** This section lists all the users to whom this notification was sent. (See *Notification Viewed Online - page 3 (bottom) & 4.*) The following system-generated codes are used in the “Type” and “Status” fields:

<table>
<thead>
<tr>
<th>Type</th>
<th>Interpretation</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>Forwarded copy</td>
</tr>
<tr>
<td>M</td>
<td>Mandatory reviewer</td>
</tr>
<tr>
<td>M-P</td>
<td>Primary Mandatory reviewer</td>
</tr>
<tr>
<td>R</td>
<td>Automatic distribution (review not mandatory)</td>
</tr>
<tr>
<td>U</td>
<td>User initiated</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Interpretation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Reviewed</td>
</tr>
<tr>
<td>N</td>
<td>Not reviewed</td>
</tr>
</tbody>
</table>
THE USE OF PAN BY PREPARERS

Overview

PANs are automatically generated as part of the update process for changes that require review for internal control purposes. PANs are sent to the individuals who are designated in the system as reviewers – either mandatory or informational reviewers. This is all done automatically without your explicit action.

Normal Sequence

Typically, as a preparer, you will use the PAN system in the following sequence:

1. After pressing F5 Update from a data entry or ECON screen, you are automatically positioned at the Comments Entry screen where you can add comments to the notification. (See the subsection Adding Comments.)

2. Press F10 NotfPrep to display the Notification Preparation screen, where you can add reviewers as desired. (See the subsection Notification Preparation.)

3. Press F11 Detail to display the Activity Review screen, where you can review the notification before sending it. (See the subsection Notification Detail.)

4. Press F5 Update to update the EDB with the previously entered data and automatically send notifications.

Adding Comments

Immediately after pressing F5 Update from a data entry or ECON function, the Comments Entry screen will automatically display.

To add comments:

1. Type your desired message. (The cursor is automatically positioned at the beginning of the Comments field.)
   Note: The cursor will not automatically wrap text around to the next line; press Tab to move the cursor to the next line.

2. You are limited to nine lines of comments.
3. You can mark a PAN “Urgent” by tabbing to the “Priority” field and replacing the default value of “R” (for “Regular priority”) with a “U” (for “Urgent priority”).

When you have completed your entry you may:

- Press F10 NotfPrep to go to the Notification Preparation screen and add reviewers as desired. (See subsection Notification Preparation.)
- Press F11 Detail to view the notification detail that will be sent. (See subsection Notification Detail.)
- Press F5 Update to complete the update and send the notification to the specified user(s). The message U0007 Update Process Complete will be displayed on the data entry screen.
- Press F3 Return to return to the data entry screen or bundle prior to updating the record. Choose this option to make additional changes to the employee record, if desired. Note: If you F3 back to the data entry function or bundle, comments and/or additional users added on the PAN preparation are not lost. To re-invoke PAN, press F5 Update from the data entry screen.

### Notification Preparation

Pressing F10 NotfPrep from the Comments Entry screen will display the Notification Preparation screen.

### Adding Reviewers

To add reviewers to the notifications list:

1. Position the cursor at the next available blank medium-size line in the list titled “User ID Email.” (You may have to F8 Forward to get to a blank set of lines.)
   Note: The command line in the left margin is used to delete a manually entered User ID; the long field will be populated with the user’s email address.

2. Type in the PPS User ID of the user. Press Enter. The system will automatically add a Type code of “U” for user initiated.
   
   If you do not know the Logon ID of the user, use F6 Directory to pull up an alpha listing of users and their Logon IDs. (Note: IDIR is not case sensitive; type in the user’s last name. F7 Backward or F8 Forward to refine your search.) Select the user by typing an “S” next to their name and press Enter. Press F3 Return to return to the Notification Preparation Screen.
Completing the PAN Process

When you have completed specifying additional reviewers you may:

- Press **F10 Comments** to return to the Comments Entry screen. (See subsection *Adding Comments*.)
- Press **F11 Detail** to view the notification detail that will be sent, including the list of reviewers who will receive the PAN. (See subsection *Notification Detail*.)
- Press **F5 Update** to complete the update and send the notification to the specified user(s). The message **U0007 Update Process Complete** will be displayed on the data entry screen.
- Press **F3 Return** to return to the data entry screen or bundle prior to updating the record. Choose this option to make additional changes to the employee record, if desired.

**Notification Detail**

The detail feature allows you to view the notification as it will be seen by reviewers. When you press **F11 Detail** from the Notification Preparation screen or the Comments Entry screen, the Activity Review screen is displayed.

When you have completed viewing your entry you may:

- Press **F10 Comments** to enter text into the Comments field. (See subsection *Adding Comments*.)
- Press **F11 NotfPrep** to return to the Notification Preparation screen and add reviewers as desired. (See subsection *Notification Preparation*.)
- Press **F5 Update** to complete the update and send the notification to the specified user(s). The message **U0007 Update Process Complete** will be displayed on the data entry screen.
- Press **F3 Return** to return to the data entry screen or bundle prior to updating the record. Choose this option to make additional changes to the employee record, if desired.

Note: If you F3 back to the data entry function or bundle, comments and/or additional users added on the PAN preparation are not lost. To re-invoke PAN, press **F5 Update** from the data entry screen.
Overview

Viewing PANs in the Payroll/Personnel Online System maintains an audit record. The following section discusses the selection and viewing of PANs in CICS. (For information about viewing PANs on the web, see Section 9.3, Web-Based PAN.)

PAN Menu Structure

To access the PAN Subsystem in CICS, type PSRV in the NextFunc field on the Online Applications Main Menu. Press Enter. The PostAuth Notify Function Code Menu is displayed. This is the main PAN menu.

PostAuth Notification Function Code Menu

The following functions are available from this menu:

**INBX**  Incoming Notifications: Displays a list of all notifications that have been sent to you. You may then select the notification you want to review online.

**INRS**  Notification Review Selection: Allows you to create a list of all PANs that meet your selection criteria (such as a particular preparer and/or date prepared). You may then select the notification you want to review online.

**IDIR**  Directory. The Directory screen allows you to look up a user name and corresponding PPS User ID.

To select one of the functions, type the appropriate four-letter function code in the NextFunc field. Press Enter.
**Viewing CICS PAN Notifications (INBX)**

In order to view a PAN, you must select it from your list of incoming notifications. This is a two step process: first, you must view a summary list of your incoming notifications; second, you select the notification to be viewed.

**INCOMING NOTIFICATIONS SCREEN.**

<table>
<thead>
<tr>
<th>System</th>
<th>Tran</th>
<th>Prepared By</th>
<th>Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tran</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Procedure**

**Step 1: Summary List**

To view a summary list of your incoming notifications:

Type `INBX` in the **NextFunc** field. Press **Enter**. A summary list of your incoming PANs is displayed on the **Incoming Notifications** screen.

For each incoming notification, this screen lists the following summary information:

<table>
<thead>
<tr>
<th>System</th>
<th>Abbreviation indicating the Subsystem where the notification originated. (PPP is the abbreviation for the Payroll/Personnel Online System.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tran</td>
<td>The function code of the screen or bundle on which data was changed.</td>
</tr>
<tr>
<td>Prepared By</td>
<td>The name of the preparer who updated the employee record.</td>
</tr>
<tr>
<td>Date</td>
<td>The date the update took place.</td>
</tr>
<tr>
<td>Comments</td>
<td>Indication (Yes or No) of whether the notification includes comments typed by the user.</td>
</tr>
<tr>
<td>Summary</td>
<td>Description of the screen or bundle on which the data was changed.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the Employee whose record was updated.</td>
</tr>
</tbody>
</table>

**Step 2: Notification Selection**

To select the specific notification you want to review:

1. On the Incoming Notifications screen, tab to the notification you want to view. Type **S**. Press **Enter**. If you have more than one page of notification summaries, you may use **F7 Backward** and **F8 Forward** to scroll through the list.

2. To scroll through each page of the notification, use the **F8 Forward** key. To return to a previous page, use the **F7 Backward** key.

3. When you finish reviewing the notification, press **F3 Return** to return to the Incoming Notification screen. The notification you just viewed will be a different color or brightness, depending on your terminal emulation, and will have an asterisk (*) in the field to its left.
How to Read a CICS PAN

PANs provide some background information about the employee, most of the changed data elements and additional comments from the preparer about the action.

- The PAN is divided into five sections. (See subsection The PAN Structure, above.)

- Changes are highlighted with new information on the top and old or changed information in brackets (< >) below. Changes in the “Appointment and Distribution Information” section are also highlighted by a plus (+) to the left of the line which contains new data and a minus (-) immediately below it to the left of the line which contains the old or changed data.

- The new information is displayed above the old data.

- The word “None” in brackets (<NONE>) indicates that the information in the line above is new information and the field previously contained no data.

The following PAN example illustrates some of the key elements to review:

SAMPLE (ANNOTATED) PAN FOR AN ADDITIONAL EMPLOYMENT ACTION FOR A WORK-STUDY STUDENT:

UCIARV0-I0863     SCT PostAuth Notify  03/17/03 11:13:48
Activity Review   Userid: SCPSSJAG
Page 01 of 04

App: PPP Tran: ADDL  Userid: SCTRN44  Date: 03/18/97  Time: 10:18:17

<table>
<thead>
<tr>
<th>Section Indicator</th>
<th>Employee and Preparer Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>***********************************</td>
</tr>
</tbody>
</table>

Employee: HARD TEST WORKING
ID: 440000911
Action: 13-Additional Employment
Preparer: SCTRN44

Preparer: SCTRN44
Removed Alternate Home Department access & Updated address
PPS OVERVIEW

---------------------------------- General Information ------------------------------------
Home Dept: 000900 TRAINING ONLY  Emp Rel Cd: E-Other
Emp Status: I-Inactive  Emp Rel Un: CX-CUE Clerical
Hire Date: 06/05/95  EUC: CX-CUE Clerical
Student Status: 3-Undergrd Stu  EREP: U
Registered Units: 12  BELI: 5- No benefits eligib
Retirement: N-Not Eligible  BELI Eff Date: 06/05/95
FICA Elig: N-Not Eligible  Ret/FICA Derive: Status Qual 1/2:
Citizenship: C-U.S. Citizen  Next Review Type:
Work Permit End Date:  Next Review Date:
Separation Date:  Probationary End:
Last Day on Pay Status:  LOA Return Date:
Destination:  LOA Reason:

-------------------- Appointment and Distribution Information ---------------------
*Action: 40 Other Appointment Action
*Action: 50 Other Distribution Action
10) 4920 ASSISTANT III  Dept: CROWN/MERRILL APARTMENTS
   + Term of Service: 06/05/95 to 04/17/96  % Time: .20 Grade: TUC: CX LV: N
   - 09/30/96

Personnel Program: Staff/Prof  Appt Type: Limitd/Restr  Basis:  Paid Over:
11) Pay Category: REG-REGULAR  $5.8400 Hourly  Step:
   +at 20.00% Variable Time, effective 09/25/95, with an end date of 04/17/96
   - 06/14/96
   from account 7-761340-70490-2 Work Study - Federal

*Action: 13 Additional Employment
*Action: 50 Other Distribution Action
+20) 4921 ASSISTANT II  Dept: OMP PHYSICAL PLANT
   - <None>
   +Term of Service: 04/18/96 to 06/30/96  % Time: .23 Grade: TUC: CX LV: F

Funding information for Distribution 21

Who Received PANs, What kind of Reviewer they are and whether or not they have looked at this PAN

Name UserID or e-mail -Type- -Status-
Celena S Allison SCPERCSA R N
Sally Service Center SCTRNSCS M Y
TRAINING49 USER SCTRN49 M N
TRAINING62 USER SCTRN62 M N
TRAINING63 USER SCTRN63 R N
TRAINING66 USER SCTRN66 R N
**Forwarding Notifications in CICS**

While reviewing a notification online, you can forward it to other authorized PPS users as appropriate.

### Notification Forwarding Screen

<table>
<thead>
<tr>
<th>EventID</th>
<th>Description</th>
<th>User ID</th>
<th>Type</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPS</td>
<td>Notify</td>
<td>PPS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCT</td>
<td>Postnotify</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification Forwarding</td>
<td>User: SCP5S25G</td>
<td>Julie Goldstein</td>
<td>U</td>
<td><a href="mailto:juliegg@ucsc.edu">juliegg@ucsc.edu</a></td>
</tr>
</tbody>
</table>

**Procedure**

To forward a notification to another user:

1. While viewing the notification, press **F6 FwdNotif**. The Notification Forwarding screen is displayed. This screen lists the Logon IDs of the reviewers to whom a PAN has already been routed.

2. Position the cursor at the next available blank medium-size line in the list titled “User ID Email.” (You may have to **F8 Forward** to get to a blank set of lines.)

   **Note:** The command line in the left margin is used to delete a manually entered User ID; the long field will be populated with the user’s email address.

3. Type in the **PPS User ID** of the user. Press **Enter**. The system will automatically add a Type code of “U” for user initiated.

   If you do not know the Logon ID of the user, use **F6 Directory** to pull up an alpha listing of users and their Logon IDs. (Note: IDIR is not case sensitive; type in the user’s last name. **F7 Backward** or **F8 Forward** to refine your search.) Select the user by typing an “S” next to their name and press **Enter**. Press **F3 Return** to return to the Notification Preparation Screen.

   **Note:** Comments cannot be added to a PAN forwarded from the CICS Inbox.

4. Press **F5 Update** to send the notification to the additional reviewers. The message **U0007 Update Process Complete** will be displayed. The notification will only be forwarded to the users you specifically added. It will not be re-sent to the others on the list.
Deleting Notifications in CICS

You may want to delete notifications from your Inbox list. When you take this action, you are just removing the notification from your Inbox list, not deleting the notification from the system. You can still access the notification by using the INRS function as described in subsection Viewing Specific Notifications.

Procedure

To delete Notifications from your Inbox list:

1. On the Incoming Notifications screen, tab to the notification you want to remove.
2. Type D on the notification line next to the notification you want to remove. Press Enter.

Viewing Specific Notifications in CICS (INRS)

The INRS function can be used to locate and view a specific notification. This feature allows you to access notifications that may have been deleted from your Inbox list or to research questions or patterns. For example, you may need to see a list of all the notifications received by a mandatory reviewer you supervise. (You will be able to select and view only the notifications generated for employees within your assigned security.)

Procedure

In order to view a notification it must be selected from a list of notifications. This is a three step process:

- first, access INRS;
- second, create and view a summary list of notifications;
- third, select the notification to be viewed.
Step 1: Access INRS

1. On the Main Menu, select the PostAuth Notify Function Code Menu by entering PSRV in the Next Function field. This brings up the main PAN menu.

2. On the main PAN menu screen, enter INRS in the Next Function field. This brings up the Notification Review Selection Screen.

Step 2: Create a Summary List

To create a list of notifications that meet specific criteria:

1. Type the selection criteria values, as desired. You can specify more than one selection criteria on this screen, if desired. This enables you to access a specific range of notifications. The selection criteria fields are as follows:

<table>
<thead>
<tr>
<th>Fields by which to view notifications</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Enter a three-digit application code to specify notifications from one of the system applications. (Specify PPP for Payroll/Personnel.)</td>
</tr>
<tr>
<td>Transaction</td>
<td>You can view notifications related to a specific transaction type, such as hire. Enter a screen or bundle function code to view all notifications of that type.</td>
</tr>
<tr>
<td>Originator ID</td>
<td>You can view notifications prepared by a specific PPS user. Enter a PPS User ID to view all notifications prepared by that user.</td>
</tr>
<tr>
<td>Department</td>
<td>Not used at UCSC.</td>
</tr>
</tbody>
</table>

2. Press Enter.

A summary list of all the notifications that meet all the specified selection criteria is displayed on the Notification Review Browse screen (below).
This screen lists the following summary information for each notification:

<table>
<thead>
<tr>
<th>System</th>
<th>Abbreviation indicating the Subsystem where the notification originated. (PPP is the abbreviation for the Payroll/Personnel System.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tran</td>
<td>The function code of the screen or bundle on which data was changed.</td>
</tr>
<tr>
<td>Prepared By</td>
<td>The name of the preparer who updated the employee record.</td>
</tr>
<tr>
<td>Date</td>
<td>The date the update took place.</td>
</tr>
<tr>
<td>Comments</td>
<td>Indication (Yes or No) of whether notification includes comments typed by the user.</td>
</tr>
<tr>
<td>Summary</td>
<td>Description of the screen or bundle on which the data was changed.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the Employee whose record was updated.</td>
</tr>
</tbody>
</table>

**Step 3: Notification Selection**

To select the specific notification you want to review:

1. On the Notification Review Browse screen, tab to the notification you want to view. Type S. Press Enter. If you have more than one page of notification summaries, you may use F7 Backward and F8 Forward to scroll through the list.

2. To scroll through each page of the notification, use the F8 Forward key. To return to a previous page, use the F7 Backward key.
   - If the message U0204 Not authorized to view the selected notification is displayed, you do not have access to the employee record displayed in the PAN notification. Security Access to notifications is the same as is allowed in EDB Inquiry.

3. You can forward the notification by pressing F6 FwdNotif. (See subsection Forwarding Notifications for additional details.)

4. When you finish reviewing the notification, press F3 Return to return to the Notification Review Browse screen.

5. You can select another notification for review, or you can return to the Notification Review Selection screen by pressing F3 Return. (Press F3 again to return to the main PAN menu.)