

SPO Pending Statement of Intent (SOI) Transactions Query

Introduction This section provides the procedure for running the SPO Pending Statement of Intent (SOI) Transactions Query.

Usage SPO supervisors should run this query prior to each payroll processing cutoff date to identify SOI transactions in a pending status. Pending SOI transactions will not transmit to JUMPS for payroll processing.

Description The SPO Pending SOI Transactions Query returns the following data elements.

Field/Column	Description
ID	Employee ID of the member
Name	Name of the member (Last, First, MI)
DeptID	Member's assigned department ID
Descr	Department ID Description/Unit Name
Sal Plan	Member's Salary Plan (e.g. ENL-Enlisted, OFF-Officer, WAR-Warrant Officer)
Grade	Member's Pay Grade (e.g. E5, O1, W4)
Eff Date	Effective Date of the SOI transaction (MM/DD/YYYY)

Procedure Start Internet Explorer, sign into MyPortalDirect and follow these steps to run the SPO Pending Pay and Separations Transactions Query.

Step	Action
1	Select menu items in the following order: <u>Enterprise Main/Menu</u> > <u>Direct Access Content</u> . The Direct Access (PeopleSoft 8.0) menu will open in a new window, open the query manger by clicking on the following menu items: <u>People Tools</u> > <u>Query Manager</u> > <u>Use</u> > Query Manager

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SPO Pending Statement of Intent (SOI) Transactions Query, Continued

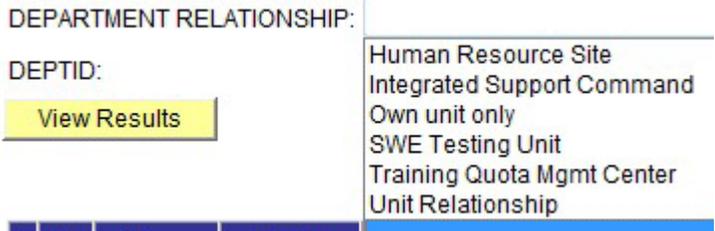
Procedure (continued)

Step	Action															
2	<p>The Query Manager page will display. Click in the blank field to the right of "begins with" and enter all or part of the query title "CG_SPO_PEND_TRANS" and then click the search button.</p>  <p>Home > PeopleTools > Query Manager > Use > Query Manager New Window</p> <p>Query Manager Find an Existing Query</p> <p>Search by: Name <input type="text"/> begins with <input type="text"/> CG_SPO_PEND_TRANS *Query Type: User <input type="text"/></p> <p><input type="button" value="Search"/></p> <p>Create New Query</p> <p>Search Results</p> <table border="1"> <thead> <tr> <th>Query</th> <th>View All</th> <th>First</th> <th>1-2 of 2</th> <th>Last</th> </tr> </thead> <tbody> <tr> <td>CG_SPO_PEND_TRANS_ENTL_SEP Pending Transactions Public Delete Rename Run</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>CG_SPO_PEND_TRANS_SOI Pending Transactions Public Delete Rename Run</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Query	View All	First	1-2 of 2	Last	CG_SPO_PEND_TRANS_ENTL_SEP Pending Transactions Public Delete Rename Run					CG_SPO_PEND_TRANS_SOI Pending Transactions Public Delete Rename Run				
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3	Click the <u>Run</u> link for the <i>CG_SPO_PEND_TRANS_SOI</i> query.															
4	<p>The query page will open in a new window.</p>  <p>Query</p> <p>CG_SPO_PEND_TRANS_SOI - Pending Transactions</p> <p>DEPARTMENT RELATIONSHIP: <input type="text"/></p> <p>DEPTID: <input type="text"/> <input type="button" value="Search"/></p> <p><input type="button" value="View Results"/></p> <p>Enter the search criteria as described in the following steps.</p>															

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SPO Pending Pay and Separations Transactions Query, Continued

Procedure (continued)

Step	Action
<p>5</p>	<p>Click the drop-down arrow in the Department Relationship field and select the Human Resource Site relationship type. This relationship will return results for all units in the HRS/SPO's AOR. The following relationship types may also be used to limit results:</p>  <ul style="list-style-type: none"> • Integrated Support Command -- Will return results for all units in the Base's/PSSU's AOR. • Own Unit Only -- Will return results for the department ID number entered. • Unit Relationship -- If a unit relationship has been setup, will return results for the unit ID entered and related units. <p>Note: Relationship Types are administered through the following menu: Home > Develop Workforce > Plan Successions (GBL) > Setup > Dept Relationships</p> <p>If the "Own Unit Only" relationship type does not provide any results, use the Dept Relationships maintenance menu and setup the Own Unit Only relationship. This is not established in the system for all units. It has to be setup at least once.</p> <p>The <i>SWE Testing Unit</i> and <i>Training Quota Mgmt Center</i> relationship types are not applicable to this query and should not be used.</p>
<p>6</p>	<p>Enter the Department ID number in the DEPTID field. Use the lookup icon to search for the ID if necessary.</p>

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SPO Pending Pay and Separations Transactions Query, Continued

Procedure (continued)

Step	Action
7	<p>Click the View Results button.</p> <p>CG_SPO_PEND_TRANS_SOI - Pending Transactions</p> <hr/> <p>DEPARTMENT RELATIONSHIP: <input type="text" value="Human Resource Site"/></p> <p>DEPTID: <input type="text" value="010105"/> <input type="button" value="Q"/></p> <p>View Results</p>
8	<p>The query will run and the results will be shown in the lower portion of the window.</p> <p>Review each pending SOI transaction. Ensure transactions have been prepared in accordance with the guidance in CG SPO Manual, PPCINST M5231.3 (series), Part VI, Separations, Chapter 2, Statement of Intent.</p> <ul style="list-style-type: none"> • Approve all valid SOI transactions at least 45 days prior to the effective date of separation. SOI transactions may be changed (by submitting and new SOI transaction) up to the payroll processing date prior to the separation date. • Delete pending SOI transactions for: <ul style="list-style-type: none"> • A member in a non-pay status who is involuntarily retained (i.e., members in military confinement or in an appellate leave status). • Enlisted members being promoted to warrant officer. • Warrant Officers being promoted to Lieutenant. • Members in military confinement whose enlistment expires. • Members on appellate leave whose enlistment expires. • Members who have already separated (e. g. Separation transaction has been approved and transmitted). • Reserve Component members who are not on long-term active duty or EAD. A SOI transaction is not necessary for a member completing short-term (R990) orders or separating from an inactive duty status.

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SPO Pending Statement of Intent (SOI) Transactions Query, Continued

Procedure (continued)

Step	Action
8	If the member's intentions or any information on the SOI transaction changes following submission, re-submission with a new effective date is required. In addition, immediately notify PPC (SES) by urgent email correspondence if the member's intentions change within 15 days of the impending separation/retirement date.
9	The query results will display. Use the Download results in: Excel2K Spreadsheet or CSV Text File links to save a copy of the query to your local system.
