

SAM II CHECKLIST

SAM II SCREEN CHECKLIST			
	TRANSACTION	ADDITIONAL COMMENTS	REQUIRED
ESTABLISHING A NEW EMPLOYEE/CHANGING AND EXISTING EMPLOYEE-PERSONNEL USE ONLY			
<input type="checkbox"/>	ESMT	Establishing pay rate. Personnel Action based on hiring type.	R
<input type="checkbox"/>	AGYD	Pay and Work Locations Established.	R
<input type="checkbox"/>	ADDR	Does Employee wish to release home address? Also the Data Warehouse Mailing Address.	R
<input type="checkbox"/>	ATTR	Establishes EEO Information.	R
<input type="checkbox"/>	LCNS	Relevant licenses, certifications, etc..	O
<input type="checkbox"/>	EMER	Emergency Contacts	O
<input type="checkbox"/>	PASS	Building Access Cards, Office Keys, ID Badges, etc.	O
<input type="checkbox"/>	USR1	Total State and Agency Service	R
<input type="checkbox"/>	USR2	Tickler Dates	O
<input type="checkbox"/>	USR3	Shareleave Donation above Max; Non Merit Tenure	O
<input type="checkbox"/>	TAX	Information from W-4 and MO W-4	R
ESTABLISHING A NEW EMPLOYEE - PAYROLL USE ONLY			
<input type="checkbox"/>	SAVB	Required if employee wants saving bond deduction	O
<input type="checkbox"/>	MISC	Enroll in appropriate retirement plan (if eligible)	R
<input type="checkbox"/>	MISC	Enroll in long-term disability (if eligible)	R
<input type="checkbox"/>	MISC	Enroll in basic life insurance (if eligible)	R
<input type="checkbox"/>	MISC	Enroll in optional life insurance	O
<input type="checkbox"/>	MISC	Enroll in cafeteria plan: administration fee, flexible medical, and dependent care	O
<input type="checkbox"/>	MISC	Enroll in any other miscellaneous deductions (credit unions, charitable campaign contributions, non-state sponsored insurance premiums, union dues, educational reimbursements, allowances, etc.)	O
<input type="checkbox"/>	ENRL	Deferred Compensation and State Sponsored Health/Dental/Vision	R
<input type="checkbox"/>	1DED	May be used to "catch-up" employees on insurance premiums: refer to MOSERs and MCHCP enrollment process spreadsheets on the web	O
<input type="checkbox"/>	ENRL	Unemployment Compensation	R
<input type="checkbox"/>	AGYS	Change LDPR (if different than position)	
ESTABLISHING A POSITION - PERSONNEL USE ONLY			
<input type="checkbox"/>	PSMT	Establishes position attributes	R
<input type="checkbox"/>	PAMT	Initiated by OA/PD	R
<input type="checkbox"/>	PUD1	Completed by OA/PD	R
<input type="checkbox"/>	PUD2	Specialty Codes	O
<input type="checkbox"/>	PUD3	Agency Discretion	O
TERMINATING AN EMPLOYEE - PERSONNEL USE ONLY			
<input type="checkbox"/>	ESMT	Stops pay/removes employees from payroll - based on status	R
TERMINATING AN EMPLOYEE - PAYROLL USE ONLY			
<input type="checkbox"/>	SAVB	Expire all savings bond deductions	R
<input type="checkbox"/>	MISC	Expire all misc. deductions/benefits	R
<input type="checkbox"/>	ENRL	Expire def comp, state sponsored health/dental, vision	R
<input type="checkbox"/>	CPER	Enter data for employee's final pay period	R
<input type="checkbox"/>	PPER	Final liquidation of annual leave and comptime balances	R