

# Retroactivity Electronic Submission Instructions

## How to Download Retroactivity Reports into Microsoft Excel for Electronic Submission

### Access Confirmation

1. Do you have a login to the following?

- Mobius View: <https://mobiusview.sco.ca.gov/mobius/view>

**Note:** This URL is Case Sensitive - it must be entered exactly as shown and it requires Microsoft Edge or Google Chrome web browser

a. **No** – Notify your department’s security monitor to request access

b. **Yes** – Proceed to next step

2. Log into Mobius View using your user name and password

**Note:** If needed, Mobius View training materials are located here:

<https://mobiusview.sco.ca.gov/INFO/MobiusviewTraining.pdf>

### Option 1 - Report download using Adobe Pro (Recommended Option)

1. Once logged in; select “Content Classes”

2. Find and select “PDJ6050 Monthly Retroactivity Report”

3. Find and select the name of the month to be downloaded

**Example:** July 2022 pay period data will be reflected under the August 1, 2022 report

4. Find and select the agency code (if applicable) to open the report

5. Select the “Download” icon

6. A new sub-window will appear

a. Change the Download File Name to reflect the “Route To” code and agency name found at the top left of the report, adding the month and year based on data for the pay period reflected

**Example:**

Civil Service: “0510 State Controller July 2022”

California State University: “01 Chancellor’s Office July 2022”

b. Select the Download Format to be “PDF”

**Note:** Select “More” and ensure that “Download PDF and Text documents as a single file” and “Don’t Zip Single files” are check marked

c. Select “Download”

7. Open your “Downloads” folder within your computer

8. Find and open the newly downloaded report file using Adobe Acrobat **Pro**

**Note:** The next step will not work if this file is opened with Adobe Acrobat **Reader**

9. Select “File” from the top left of the Adobe Acrobat Pro window

10. Find and hover over “Export To”

11. Find and hover over “Spreadsheet”

12. Find and select “Microsoft Excel Workbook”

13. Save to desired location

**Note:** Do not change file name

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14. Exported spreadsheet will open in Microsoft Excel
15. Within the first blank column to the right of the data, identify rows with uncontrollable transactions by entering the reason why the transaction was uncontrollable <b>Note:</b> Do not identify controllable transactions as these do not qualify for credits to be issued
16. Remove the social security numbers
17. Save changes made to report
18. Email the completed Excel report including any backup documentation to <a href="mailto:ppsdcontracts@sco.ca.gov">ppsdcontracts@sco.ca.gov</a> by the first business day of the month after the report has been released <b>Example:</b> The July 2022 pay period report available August 1, 2022 is due by September 1, 2022 <b>Note:</b> Only one report per month, per agency code should be submitted
<b>Option 2 - Report download using Text File (use only if Adobe Pro is not available)</b>
1. Once logged in; select "Content Classes"
2. Find and select "PDJ6050 Monthly Retroactivity Report"
3. Find and select the name of the month to be downloaded <b>Example:</b> July 2022 pay period data will be reflected under the August 1, 2022 report
4. Find and select the agency code (if applicable) to open the report
5. Select the "Download" icon
6. A new sub-window will appear
a. Changing the Download File Name at this point is optional. Feel free to change the file name if it will help you identify the file within the Download folder.
b. Ensure that "More" has been selected in order to change the Download Format to "TEXT" and be sure that "Download PDF and Text documents as a single file" and "Don't Zip Single files" are check marked
c. Select "Download"
7. Open a new, blank Microsoft Excel workbook
8. Select "Data" tab
9. Select "From Text" icon
10. Within the newly appeared window, find and select the report within the "Downloads" folder
11. Select "Import"
12. Within the new window, select "Fixed width" within the Original data type section
13. Select "Next"
14. Within the Data preview section, scroll down to where the payroll data appears (skipping the header information)

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15. Click (to place an arrow) or double click (to remove an arrow) next to each section of the data

**Example:**

Data preview

SSA NUMBER	EMPLOYEE NAME	POSITION NUMBER	TRANS/ TYPE P-C	EFFECT DATE /PAY PERIOD	ADNL KEY	NUMBER OF DAYS RETROACTIVE
5 [REDACTED]	S F [REDACTED]	26 [REDACTED]	01 120	07/01/2022	4172	64
5 [REDACTED]	E T [REDACTED]	26 [REDACTED]	02 A52	08/02/2022	5561	34
1 [REDACTED]	J J [REDACTED]	26 [REDACTED]	01 Q 1	12 / 2021	7816	234
3 [REDACTED]	D K [REDACTED]	26 [REDACTED]	01 Q 1	12 / 2021	2666	234

a. Scroll down to ensure that the data is properly separated on each side of the arrows

**Note:** These arrows may need to be moved to ensure that data is not incorrectly separated

16. Select "Finish"

17. Select "OK" within the Import Data window

18. Header rows at the top of the workbook should be combined/adjusted to be legible.

**Note:** Additional headers throughout the workbook can be deleted but be sure to leave the rows for "PERSONNEL" and "PAYROLL"

19. Within the first blank column to the right of the data, identify rows with uncontrollable transactions by entering the reason why the transaction was uncontrollable

**Note:** Do not identify controllable transactions as these do not qualify for credits to be issued

20. Remove the social security numbers

21. Save the Excel report

a. Select "File" from the top left of the Excel window

b. Select "Save As"

c. Find the desired location within the Browse window

d. Change the File name to reflect the "Route To" code and agency name found at the top left of the report, adding the month and year based on data for the pay period reflected

**Example:**

Civil Service: "0510 State Controller July 2022"

California State University: "01 Chancellor's Office July 2022"

e. Select Save

22. Email the completed Excel report including any backup documentation to [ppsdcontracts@sco.ca.gov](mailto:ppsdcontracts@sco.ca.gov) by the first business day of the month after the report has been released

**Example:** The July 2022 pay period report available August 1, 2022 is due by September 1, 2022

**Note:** Only one report per month, per agency code should be submitted