LSUHealth

PeopleSoft Training

Human Resources Manager Inquiry 9.1 - LSUSH

Version Date: February 2014

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Workforce Administration

Workforce Administration

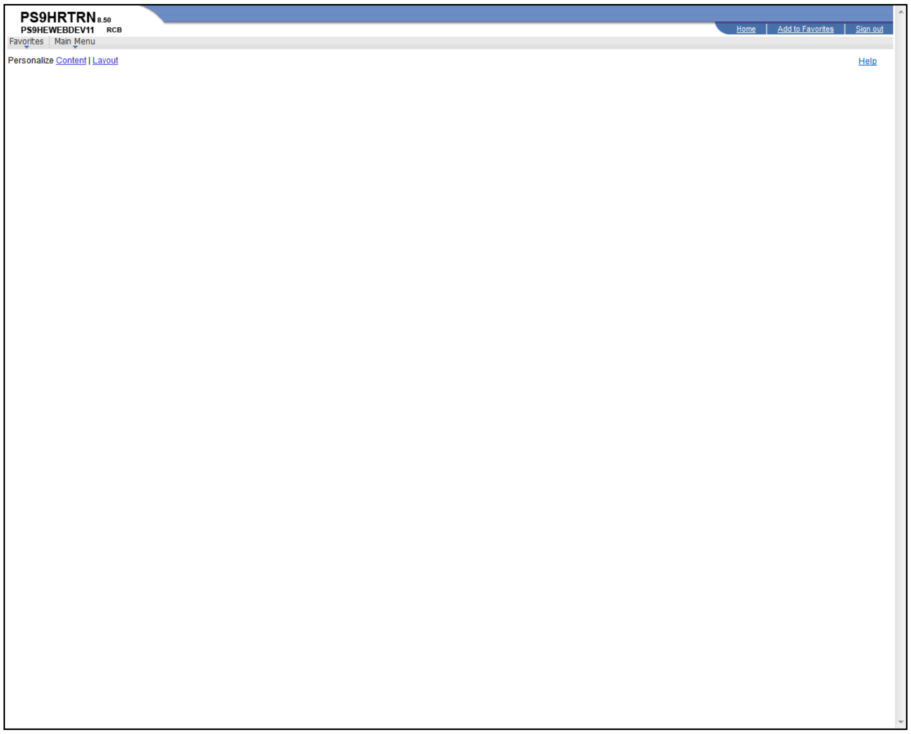
When employees are hired, they must be added into PeopleSoft Human Resources (PSHR9). Before other Human Resources tasks are initiated, essential employee data including personal, employment, job and benefit-related information must be entered into PSHR9. This is how we begin tracking a complete work history for each employee in our organization. These lessons describes how to navigate to and view pages that are accessible from the Workforce Administration menu.

View Personal Data

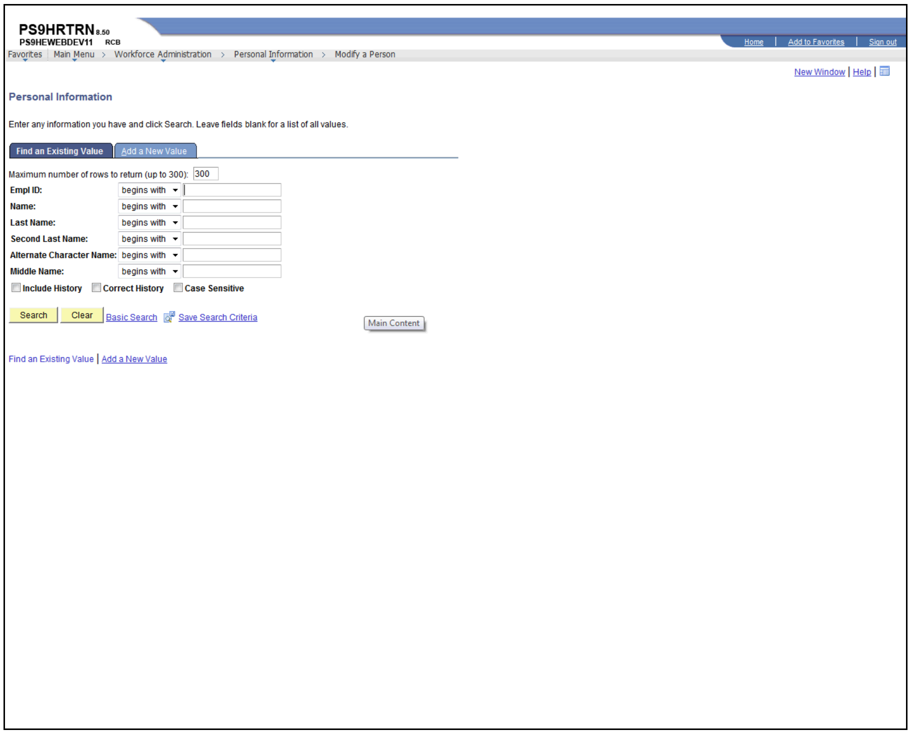
The Personal Data component contains an employee's personal information including Name, Address, Phone Number, Education, Birthplace, Military Status and Social Security Number (or National ID).

Procedure

In this topic you will learn how to **View Personal Data**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Favorites
Main Menu
Home
Add to Favorites
Sign out
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Workforce Administration** menu. Workforce Administration
3.	Click the **Personal Information** menu. Personal Information
4.	Click the **Modify a Person** menu. Modify a Person
5.	You can search for an employee using either the EmplID or the Last Name. Using the EmplID is demonstrated in this exercise. To use the Last Name option, simply enter the employee's last name into the Last Name field and then click the Search button. ***NOTE: It is not recommended to use any of the other search fields.***


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help
Find an Existing Value
Add a New Value
Search
Clear
Basic Search
Save Search Criteria
Main Content
Find an Existing Value | Add a New Value

Personal Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300
Empl ID: begins with
Name: begins with
Last Name: begins with
Second Last Name: begins with
Alternate Character Name: begins with
Middle Name: begins with
☐ Include History ☐ Correct History ☐ Case Sensitive

Step	Action
6.	The Employee ID number is denoted as EmplID in PSHR9. All EmplIDs contain seven (7) digits. You must include the preceding zeros when entering the EmplID. Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
7.	Click the **Search** button. Search
8.	View the Biographical Details tab.

Biographical Details Fields:

Person ID - This is the same as EmplID.

Effective Date - The date the action begins (i.e. employee becomes "active" within the system).

Format Type - Displays the name format currently used for this name type.

View Name - View name format and any name changes that have occurred.

Date of Birth - Age is shown in years and months based on date displayed in this field.

Waive Data Protection - Allows employee to choose to have home address and telephone number held confidential.

Highest Education Level - The highest degree earned by the employee and on record in Human Resources.

As of: - The date the action begins.

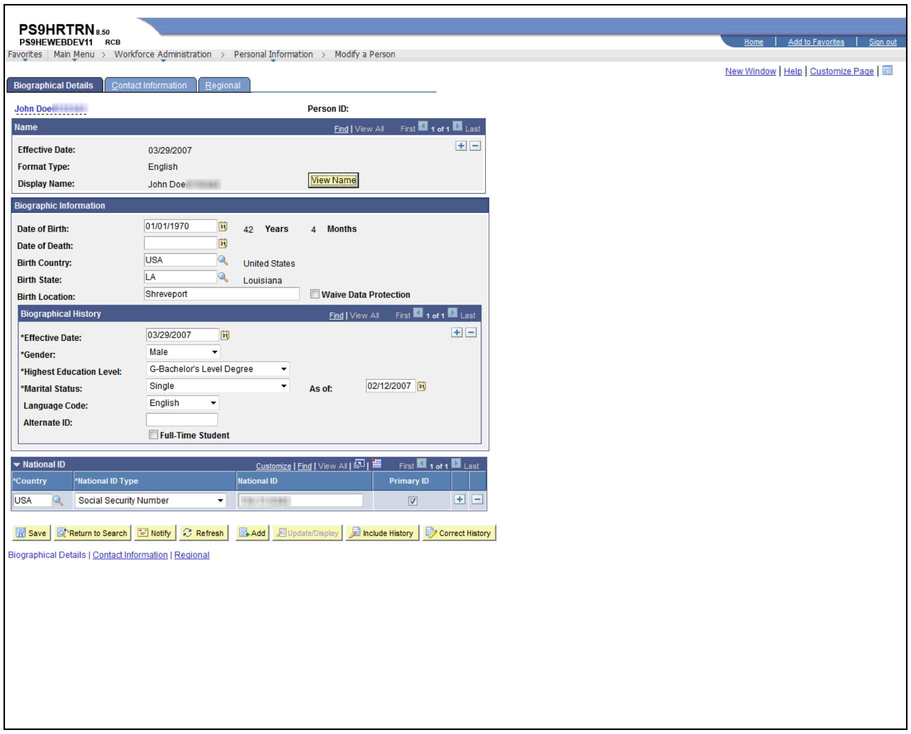
Alternate ID - Not in use at this time

Country - Is the country of the employee's National ID.

National ID Type - Is always Social Security Number.

National ID - Is always the employee's Social Security Number or the employee's National ID.

Primary ID - Indicates the primary National ID number to use for an employee.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help | Customize Page
Biographical Details
Contact Information
Regional
Find | View All First 1 of 1 Last
View Name
Customize | Find | View All
Save
Return to Search
Notify
Refresh
Add
Update/Display
Include History
Correct History
Biographical Details | Contact Information | Regional

John Doe[redacted]

Person ID:

Name

Effective Date: 03/29/2007

Format Type: English

Display Name: John Doe[redacted]

Biographic Information

Date of Birth: 01/01/1970 42 Years 4 Months

Date of Death:

Birth Country: USA United States

Birth State: LA Louisiana

Birth Location: Shreveport ☐ Waive Data Protection

Biographical History

*Effective Date: 03/29/2007

*Gender: Male

*Highest Education Level: G-Bachelor's Level Degree

*Marital Status: Single As of: 02/12/2007

Language Code: English

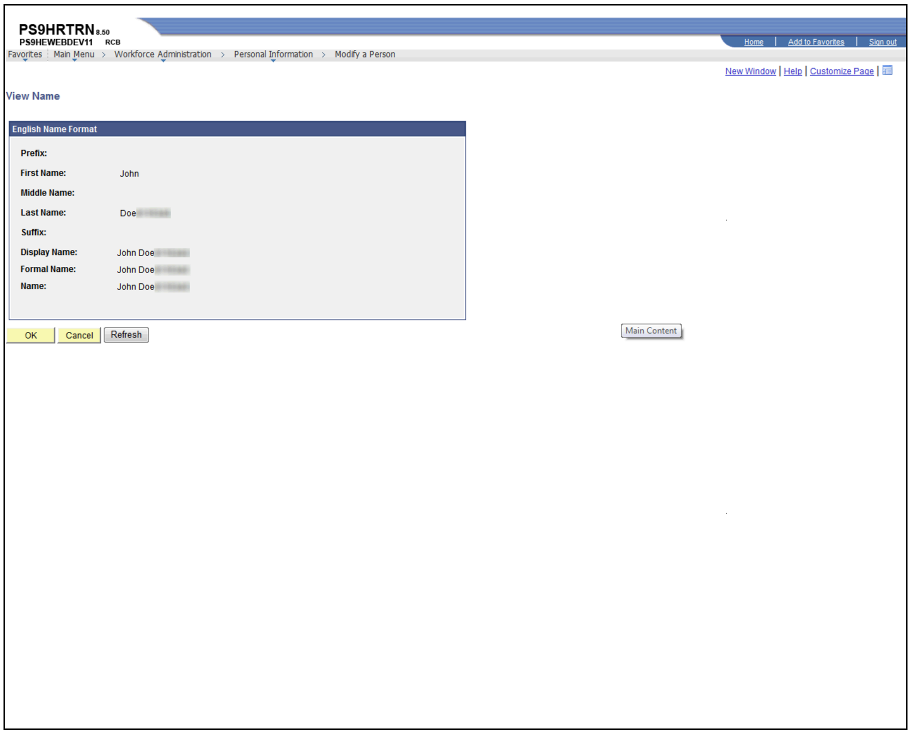
Alternate ID:

☐ Full-Time Student

National ID

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number	[redacted]	☑

Step	Action
9.	Click the **View Name** link to view additional Name details. View Name

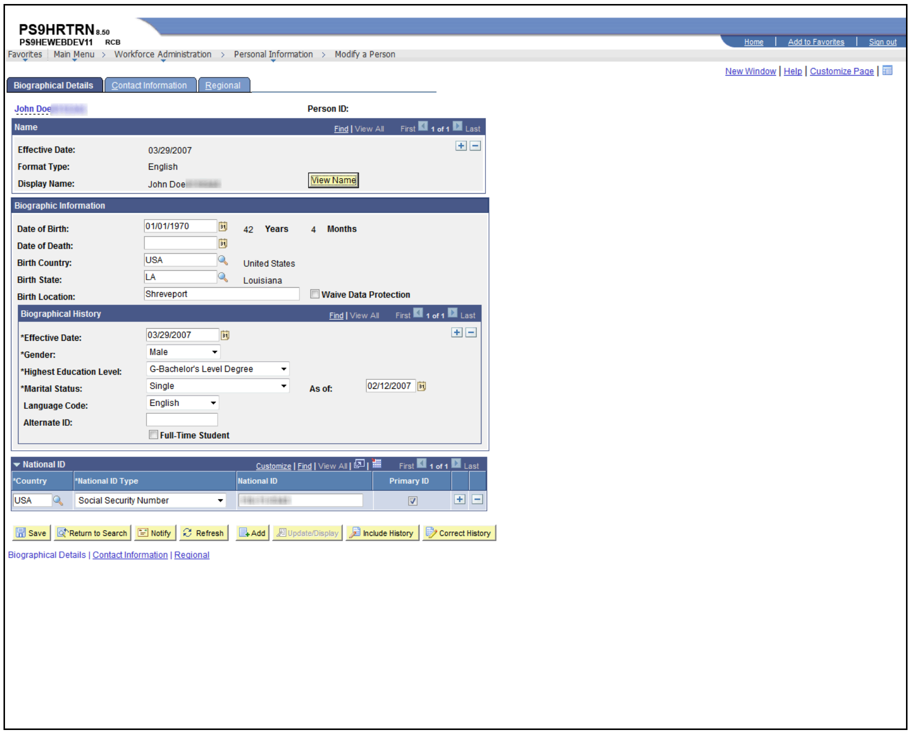

PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help | Customize Page
OK
Cancel
Refresh
Main Content

View Name

English Name Format

Prefix:
First Name: John
Middle Name:
Last Name: Doe[redacted]
Suffix:
Display Name: John Doe[redacted]
Formal Name: John Doe[redacted]
Name: John Doe[redacted]

Step	Action
10.	Click the **OK** button. OK


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help | Customize Page
Biographical Details
Contact Information
Regional
Find | View All First 1 of 1 Last
View Name
Customize | Find | View All
Save
Return to Search
Notify
Refresh
Add
Update/Display
Include History
Correct History
Biographical Details | Contact Information | Regional

John Doe [redacted]
Person ID:

Name
Effective Date: 03/29/2007
Format Type: English
Display Name: John Doe [redacted]

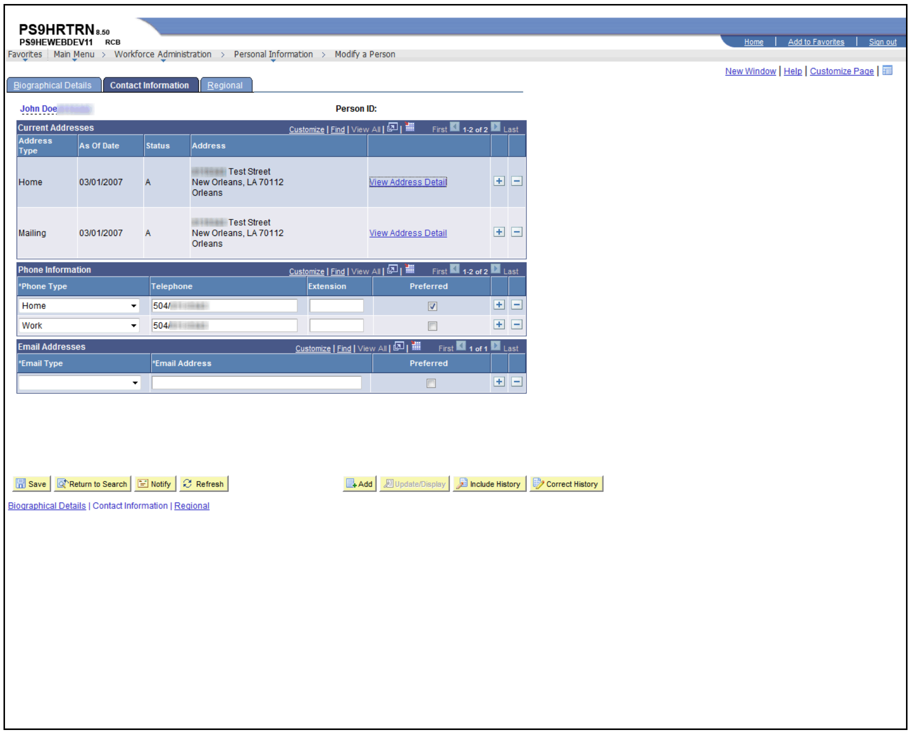
Biographic Information
Date of Birth: 01/01/1970 42 Years 4 Months
Date of Death:
Birth Country: USA United States
Birth State: LA Louisiana
Birth Location: Shreveport ☐ Waive Data Protection

Biographical History
*Effective Date: 03/29/2007
*Gender: Male
*Highest Education Level: G-Bachelor's Level Degree
*Marital Status: Single As of: 02/12/2007
Language Code: English
Alternate ID:
☐ Full-Time Student

National ID

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number	[redacted]	☑

Step	Action
11.	Click the **Contact Information** tab. Contact Information


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help | Customize Page
Biographical Details
Contact Information
Regional
Customize | Find | View All
First 1-2 of 2 Last
First 1 of 1 Last
Save
Return to Search
Notify
Refresh
Add
Update/Display
Include History
Correct History
Biographical Details | Contact Information | Regional

John Doe [redacted]

Person ID:

Current Addresses

Address Type	As Of Date	Status	Address	
Home	03/01/2007	A	[redacted] Test Street New Orleans, LA 70112 Orleans	View Address Detail
Mailing	03/01/2007	A	[redacted] Test Street New Orleans, LA 70112 Orleans	View Address Detail

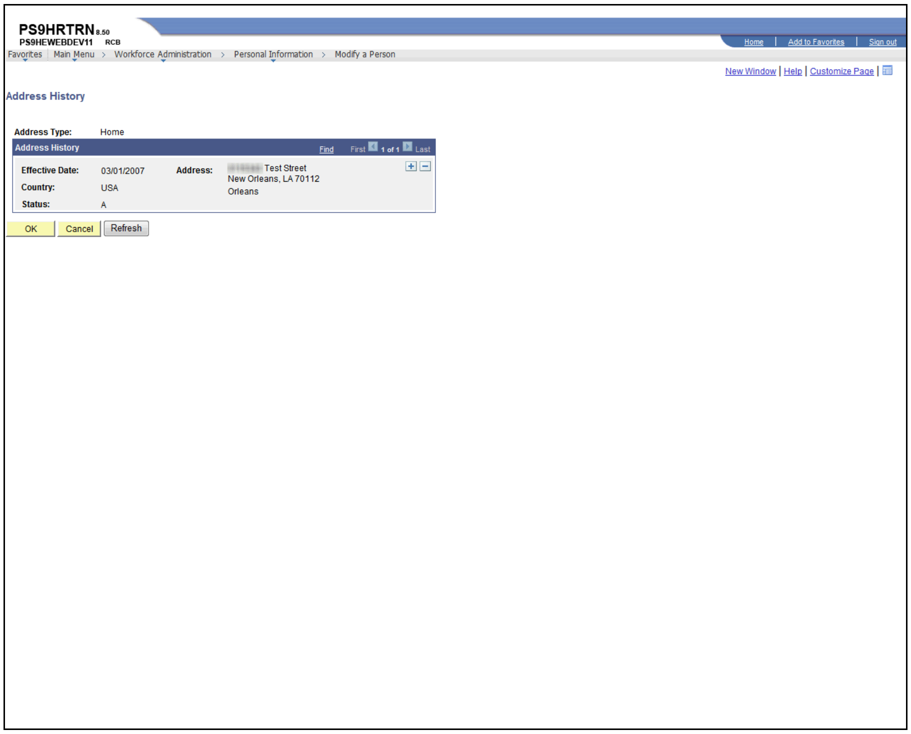
Phone Information

*Phone Type	Telephone	Extension	Preferred
Home	504/[redacted]		☑
Work	504/[redacted]		☐

Email Addresses

*Email Type	*Email Address	Preferred
		☐

Step	Action
12.	Click the **View Address Detail** link to view additional address information. View Address Detail


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help | Customize Page
Find First 1 of 1 Last
OK Cancel Refresh

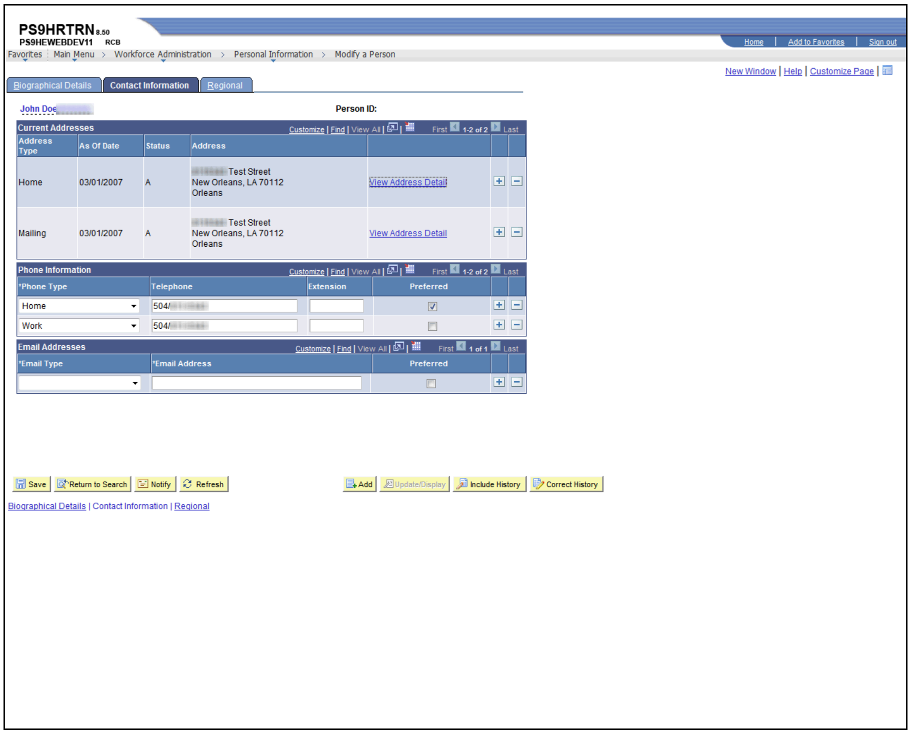
Address History

Address Type: Home

Address History

Effective Date: 03/01/2007
Country: USA
Status: A
Address: [redacted] Test Street
New Orleans, LA 70112
Orleans

Step	Action
13.	The Address is the address to which the employee prefers to have external mail sent. Click the **OK** button. OK


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person
New Window | Help | Customize Page
Biographical Details
Contact Information
Regional
Customize | Find | View All | First 1-2 of 2 Last
Customize | Find | View All | First 1-2 of 2 Last
Customize | Find | View All | First 1 of 1 Last
Save
Return to Search
Notify
Refresh
Add
Update/Display
Include History
Correct History
Biographical Details | Contact Information | Regional

John Doe [redacted]   **Person ID:**

Current Addresses

Address Type	As Of Date	Status	Address			
Home	03/01/2007	A	[redacted] Test Street New Orleans, LA 70112 Orleans	View Address Detail	+	−
Mailing	03/01/2007	A	[redacted] Test Street New Orleans, LA 70112 Orleans	View Address Detail	+	−

Phone Information

*Phone Type	Telephone	Extension	Preferred		
Home	504/[redacted]		☑	+	−
Work	504/[redacted]		☐	+	−

Email Addresses

*Email Type	*Email Address	Preferred		
		☐	+	−

Step	Action
14.	Click the **Regional** tab. Regional
15.	View the Regional tab. ***NOTE: Employment eligibility proof is the I-9 information. All new employee records will reflect this information.***

Regional Fields:

Person ID - This is the same as the EmplID.

Regulatory Region - Is always the USA option. Controls the Ethnic Group values within the system.

Ethnic Group - The federally mandated group defining the individual's ethnicity.

Primary - Indicates primary ethnicity of employee.

Effective Date - The date the employee's status becomes effective within the system.

Military Status - Describes the employee's current Military Status.

Citizenship (Proof 1 and 2) - Identifies documents used for I-9 verification.

Eligible to Work in U.S. - Indicates if the employee has the proper documentation needed to work within the United Sates.

Smoker - Indicated whether the employee is a smoker for life insurance purposes.

As of - Effective date of employee's smoker status.

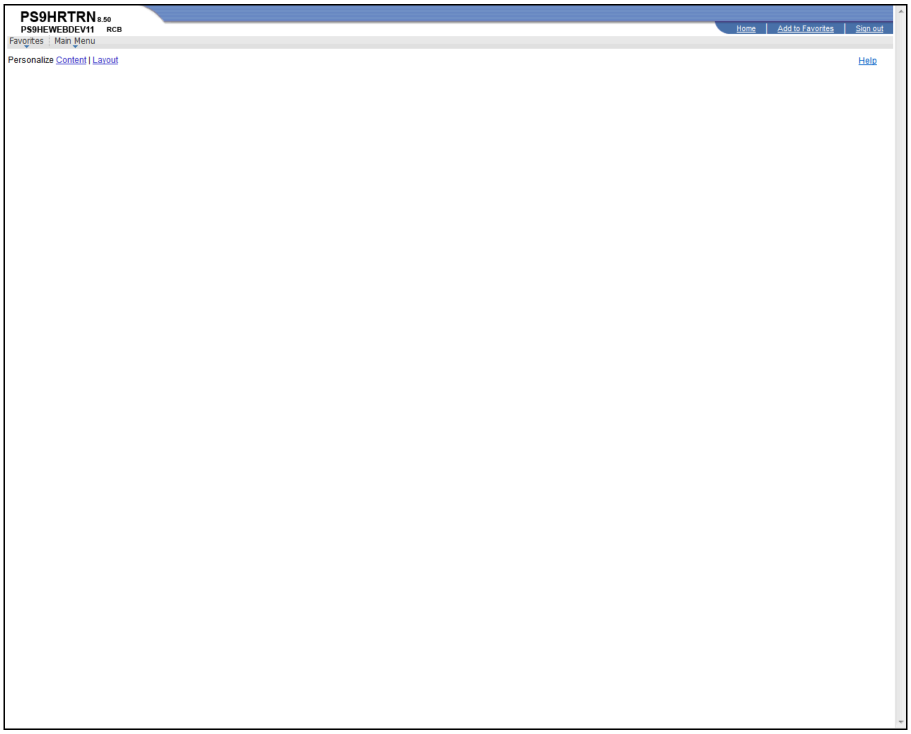
Step	Action
16.	This completes ***View Personal Data***. **End of Procedure.**

View Job Data

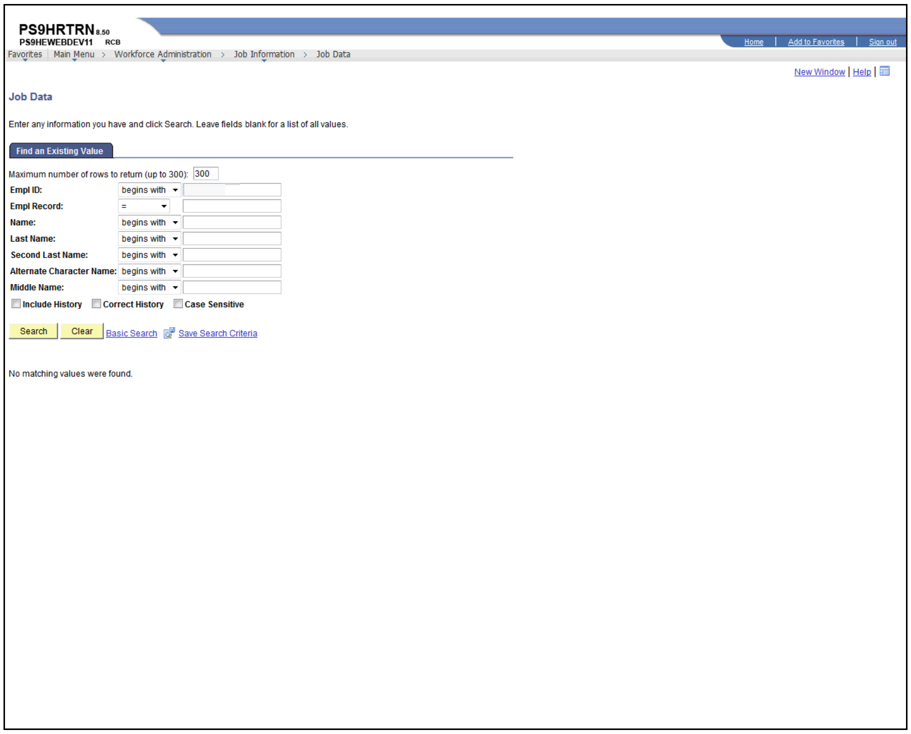
The Job Data component includes all information about an employee's job history such as promotions, reallocations, pay rate changes, and termination.

Procedure

In this topic you will learn how to **View Job Data**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Workforce Administration** menu. Workforce Administration
3.	Click the **Job Information** menu. Job Information
4.	Click the **Job Data** menu. Job Data
5.	You can search for an employee using either the EmplID or the Last Name. Using the EmplID is demonstrated in this exercise. To use the Last Name option, simply enter the employee's last name into the Last Name field and then click the Search button. ***NOTE: It is not recommended to use any of the other search fields.***


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help
Find an Existing Value
Search
Clear
Basic Search
Save Search Criteria

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300
Empl ID: begins with
Empl Record: =
Name: begins with
Last Name: begins with
Second Last Name: begins with
Alternate Character Name: begins with
Middle Name: begins with
☐ Include History ☐ Correct History ☐ Case Sensitive

No matching values were found.

Step	Action
6.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
7.	Click the **Search** button. Search
8.	View the Work Location tab.

Work Location Tab Fields:

ID - Is an auto-assigned number.

Empl Rcd # - The Empl Rcd # will always be zero, unless an employee is employed at two different LSUHSC agencies at the same time.

HR Status - Displays the status of the current job record. A person can have an active HR status but an inactive job or payroll status.

Payroll Status - Displays the payroll status of the current job record.

Go To Row - If an employee has multiple rows of action items, you may use the Go To Row button to navigate directly to a specified row.

Effective Date - The date the action began.

Sequence - The method in PeopleSoft that we use to input multiple job actions on the same date. The first action is 0, the second action is 1, etc.

Notepad - Notes on employee's job data.

Job Indicator - Indicate whether this is the person’s primary or secondary job for this organizational relationship.

Action/Reason - Provides the action and reason why an employee record was modified.

Last Start Date - The most recent start date for this organizational instance.

Termination Date - The day following the last date worked by the employee.

Expected Job End Date - This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold.

Last Date Worked - The date last worked by the employee. If you rehire the person, the system clears these fields. When a person returns from leave, the system clears only the Last Date Worked field.

Override Last Date Worked - Field is not used by HCSD at this time.

Academic Rank - Applies only to faculty.

Position Entry Date - When a position number is entered for a person, the system populates this field with the effective date.

Position Number - Is an auto-assigned number. Every employee is given a position number. The defaulting job title may differ from the Job Code on the

Job Information page if the employee is participating in a Training Series. The job title on the Job Information tab is the official job title for the employee.

Position Management Record - Field not used by HCSD at this time.
Regulatory Region - Will always be USA.

Company - 001 LSUHSC New Orleans
002 LSUHSC Shreveport
003 LSUHSC Hospitals

Business Unit - EACMC E. A. Conway Medical Center
EKLMC Earl K. Long Medical Center
HCSDA HCSD Administration
HPLMC Huey P. Long Medical Center
LAKMC Lallie A. Kemp Medical Center
LJCMC Leonard J. Chabert Medical Center
LSUNO LSUMC Medical Center
MCLNO Medical Center of LA New Orleans
UMCLA University Medical Center
WOMMC W. O. Moss Medical Center
WSTMC Washington-St. Tammany Medical Center

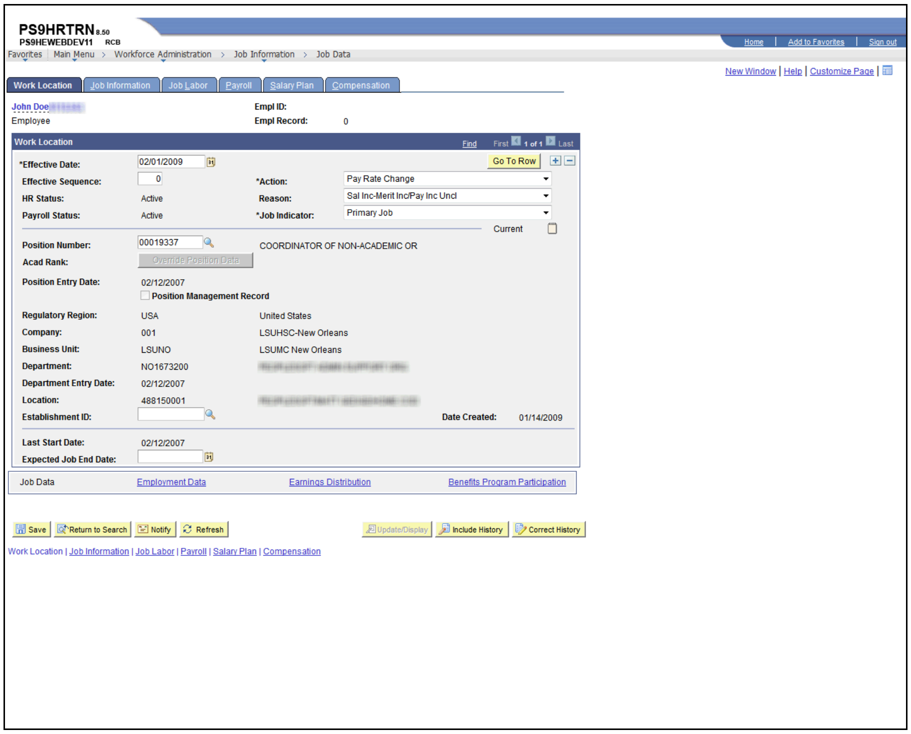
Department - The Department ID.

Department Entry Date - Date on which employee is assigned to a specific department

Location - The department location.

Establishment ID - Is not used at this time.

Date Created - The date the record was entered.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help | Customize Page
Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
Find
First
1 of 1
Last
Go To Row
Override Position Data
Current
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Save
Return to Search
Notify
Refresh
Update/Display
Include History
Correct History
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

John Doe [redacted]
Employee
Empl ID:
Empl Record: 0

Work Location

*Effective Date: 02/01/2009
Effective Sequence: 0
*Action: Pay Rate Change
HR Status: Active
Reason: Sal Inc-Merit Inc/Pay Inc Uncl
Payroll Status: Active
*Job Indicator: Primary Job
Position Number: 00019337 COORDINATOR OF NON-ACADEMIC OR
Acad Rank:
Position Entry Date: 02/12/2007
☐ Position Management Record
Regulatory Region: USA United States
Company: 001 LSUHSC-New Orleans
Business Unit: LSUNO LSUMC New Orleans
Department: NO1673200 [redacted]
Department Entry Date: 02/12/2007
Location: 488150001 [redacted]
Establishment ID:
Date Created: 01/14/2009
Last Start Date: 02/12/2007
Expected Job End Date:

Step	Action
9.	Click the **Include History** button to view additional associated with this record. Include History
10.	Click the **Show next row** button to view the next record of the employee. ▶
11.	Click the **Last** link to view the first record of the employee. Last
12.	Click the **First** link to view the current record of the employee. First
13.	Click the **Job Information** tab. Job Information
14.	View the Job Information tab.

Job Information Tab Fields:

Effective Date - Date the action begins.

Effective Sequence - The method used to input multiple job actions on the same date. The first action is 0, the second is 1, etc.

Job Indicator - Defaults over form the Work Location panel.

Action/Reason - Defaults from the Work Location panel.

Job Code - The Civil Service (6 digits) or LSU System (3 digits) numeric code related to an employee's position title. Is the official job title for the employee.

Entry Date - Defaults in from the Job Code entry.

Supervisor Level - Field is not used by HCSD at this time.

Supervisor ID - The Person ID (EmplID) of the individual to whom the employee reports. This field is optional for HCSD.

Reports To - The position number of the person to whom the employee reports. This field is optional for HCSD.

Regular/Temporary - Indicates whether the individual is a regular or temporary employee.

Full/Part - Indicates whether the individual is a full-time or part-time employee.

Empl Class - Indicates the class status of the employee based on specified codes. A partial list is provided below:

- **1 Year Trm**
- **2 Year Trm**
- **3 Year Trm**
- **4 Year Trm**
- **Agency/Tmp**
- **Ann No Ten**
- **Grd No Ten**
- **Indf No Tn**
- **Job**
- **Mult Rest**
- **Permanent**
- **Probation**
- **Provision**
- **Resident**
- **Rest Appt**

- **Student**
- **Tenured**
- **Transient**
- **Unclass**

Officer Code - Will default as NONE always.

Regular Shift - Field will default to N/A.

Shift Rate - Field will remain blank.
Classified Indc - Ties the employee's job data to a classification. A partial list is provided below:

- **Classified**
- **Faculty**
- **Graduate Assistant**
- **House Officer**
- **Fellow**
- **Gratis Employee**
- **Student**
- **Temporary**
- **Unclassified**

Shift Factor - Will remain blank.

Standard Hours - Relates to the number of hours an employee is assigned to work per week and is calculated based on the FTE (Full-time = 40 hours and Part-time = 20 or 30 hours).

Work Period - Time period in which Standard Hours are completed.

FTE - Full-time Equivalent

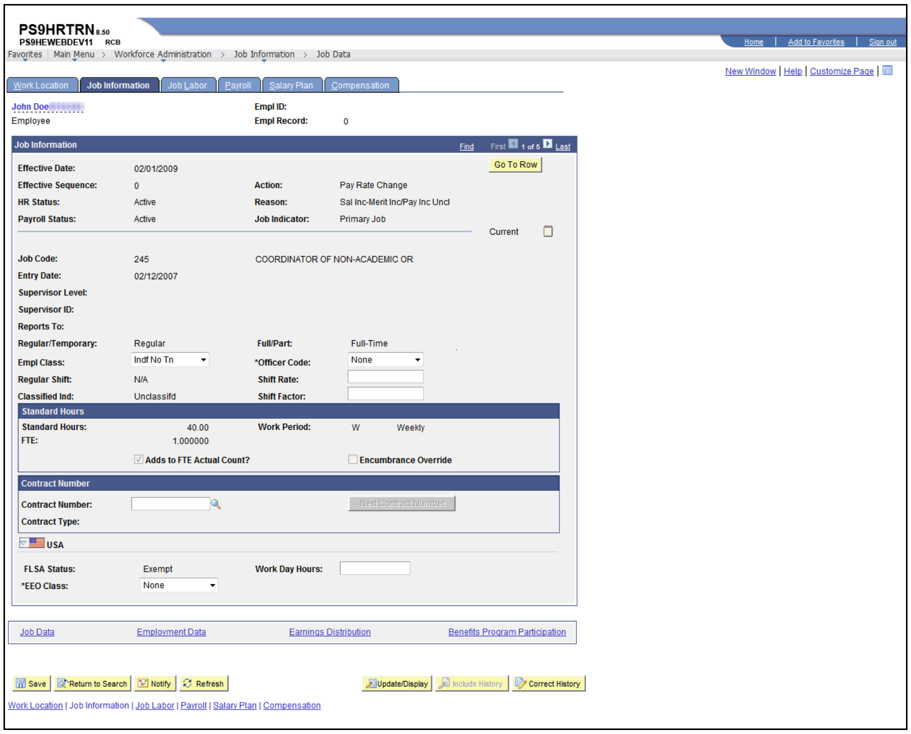
Adds to FTE Actual Count - Will default from Position Record. If not, should be checked for HCSD.

Encumbrance Override - Will remain unchecked at all times.

Contract Number - Field is not used by HCSD at this time.

Contract Type - Field is not used by HCSD at this time.

Step	Action
15.	View the American Flag section. FLSA - Must select whether Exempt or Non-exempt. Will default to Non-Exempt. EEO Class is always NONE. Work Day Hours - Will always be blank.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help | Customize Page
Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
Find
First 1 of 5 Last
Go To Row
Current
Next Contract Number
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Save
Return to Search
Notify
Refresh
Update/Display
Include History
Correct History
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

John Doe [redacted]
Employee
Empl ID:
Empl Record: 0

Job Information

Effective Date: 02/01/2009
Effective Sequence: 0
Action: Pay Rate Change
HR Status: Active
Reason: Sal Inc-Merit Inc/Pay Inc Uncl
Payroll Status: Active
Job Indicator: Primary Job

Job Code: 245 COORDINATOR OF NON-ACADEMIC OR
Entry Date: 02/12/2007
Supervisor Level:
Supervisor ID:
Reports To:
Regular/Temporary: Regular
Full/Part: Full-Time
Empl Class: Indf No Tn
*Officer Code: None
Regular Shift: N/A
Shift Rate:
Classified Ind: Unclassifd
Shift Factor:

Standard Hours

Standard Hours: 40.00
Work Period: W Weekly
FTE: 1.000000
☑ Adds to FTE Actual Count?
☐ Encumbrance Override

Contract Number

Contract Number:
Contract Type:

USA

FLSA Status: Exempt
Work Day Hours:
*EEO Class: None

Step	Action
16.	The Job Labor tab is not used at this time. Click the **Payroll** link. Payroll
17.	View the Payroll tab.

Payroll Tab Fields:

Pay Group - Defines a set of employees (with similar characteristics of pay) for payroll processing. A partial list of valid Pay groups is below:

LSUNO:

GR1 - Gratis New Orleans

NBD – To Be Determined
NBE – New Orleans Biweekly Exempt
NBN – Biweekly Non-Exempt
NBR – Residents (New Orleans)
NBS – New Orleans Students
NBT – Transients/Restricted
NMF – Full-time Faculty Staff (New Orleans)
NMG – Graduate Assistants (New Orleans)
NML – Fellows (New Orleans)
NMP – Part-time Faculty/Staff (New Orleans)
NMS – New Orleans Stipends
NRT – New Orleans Retirees

HCSD:

Note: The first letter in the Pay Group denotes the Business Unit.

H – Headquarters
E – EKLMC
K – LAKMC
L – LJCMC
U – UMCLA
T – WSTMC
W – WOMMC
P – HPLMC

Note: The example Pay Group begin with "H" – HCSD.

HBN – Non-Exempt w/benefit
HBS – Students
HBU – Temporary/Unclass/Restric
HBW – Exempt & Unclass/Restric
HMT – HCSD Monthly
HTE – Retiree

Holiday Schedule - Indicates the holiday schedule that an employee is on. A list is provided below:

HCS - Health Care Srvs Div
NOC (New Orleans) - Classified, Civil Service Employee
NHS (No Holiday Schedule) - Unclassified employees. The holiday schedule is built into their base salary and the holiday schedule is not indicated. (This does not apply to HCSD). However, for HCSD Transients or Pool employees, Students and Restricted Appointments are not eligible for any benefits.

Employee Type - Denotes whether an employee is Hourly (H) or Salary (S). For HCSD, the only salaried employees are monthly unclassified.

Tax Location Code - Is always Louisiana.

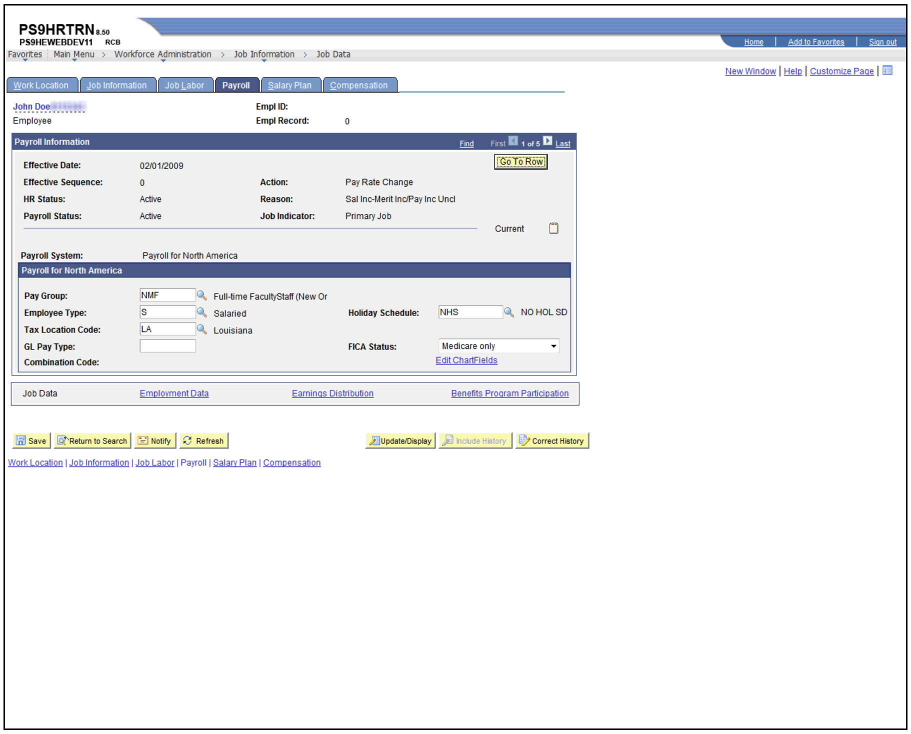
FICA Status - Indicates whether an employee is subject to:
1. Medicare and Social Security
2. Medicare only
3. Exempt from paying Medicare or Social Security.

GL Pay Type - Field is not used by HCSD at this time.

Pay Template - Defines the following:
1. Overtime status (PPM codes of 0, 1, or 2)
2. Special Pays (shift, premium pay, weekend)
3. Payment of holiday differential.

Combination Code - Is the same as the Account Code. Is not used at this time.

Edit ChartFields - Link is not used by HCSD at this time.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help | Customize Page
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation
Find | First 1 of 5 Last
Go To Row
Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

John Doe [redacted]
Employee

Empl ID:
Empl Record: 0

Payroll Information

Effective Date: 02/01/2009
Effective Sequence: 0
Action: Pay Rate Change
HR Status: Active
Reason: Sal Inc-Merit Inc/Pay Inc Uncl
Payroll Status: Active
Job Indicator: Primary Job
Current ☐

Payroll System: Payroll for North America

Payroll for North America

Pay Group: NMF Full-time FacultyStaff (New Or
Employee Type: S Salaried
Holiday Schedule: NHS NO HOL SD
Tax Location Code: LA Louisiana
GL Pay Type:
FICA Status: Medicare only
Edit ChartFields
Combination Code:

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

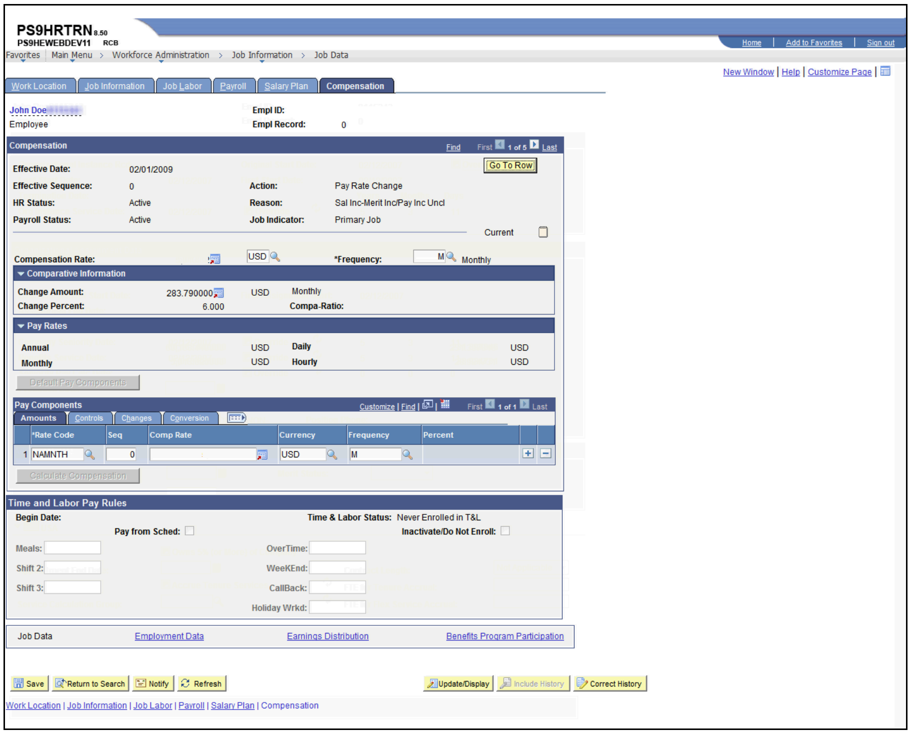
Step	Action
18.	Click the **Compensation** tab. Compensation
19.	View the Compensation tab.

Compensation Tab Fields:

Compensation Rate - The amount at which the employee is paid based on the compensation frequency.

Frequency - How often the employee is paid.

Rate Code - Can have multiple entries for an employee including base pay and any other additional compensation they may receive, such as Shift Differential, Retention, On Call, etc.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help | Customize Page
Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
Find
First 1 of 5 Last
Go To Row
Default Pay Components
Customize | Find | First 1 of 1 Last
Amounts
Controls
Changes
Conversion
Calculate Compensation
Save
Return to Search
Notify
Refresh
Update/Display
Include History
Correct History
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

John Doe [redacted]
Employee
Empl ID:
Empl Record: 0

Compensation

Effective Date: 02/01/2009
Effective Sequence: 0
Action: Pay Rate Change
HR Status: Active
Reason: Sal Inc-Merit Inc/Pay Inc Uncl
Payroll Status: Active
Job Indicator: Primary Job
Current

Compensation Rate: USD
*Frequency: M Monthly

Comparative Information

Change Amount: 283.790000 USD Monthly
Change Percent: 6.000
Compa-Ratio:

Pay Rates

Annual USD
Daily USD
Monthly USD
Hourly USD

Pay Components

	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1	NAMNTH	0		USD	M	

Time and Labor Pay Rules

Begin Date:
Time & Labor Status: Never Enrolled in T&L
Pay from Sched: ☐
Inactivate/Do Not Enroll: ☐
Meals:
OverTime:
Shift 2:
WeekEnd:
Shift 3:
CallBack:
Holiday Wrkd:

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Step	Action
20.	Click the **Employment Data** link. Employment Data
21.	View the Employment Information Tab.

Employment Information Tab Fields:

Organizational Instance Record - Defaults in from the Employee Record Number.

Original Start Date - Date the employee first began employment with the company.

Last Start Date - Is a defaulted date.

First Start Date - Original hire date with Business Unit.

Last Assignment Start Date - Is a default field.

First Assignment Start - Is a defaulted date.

Assignment End Date - Date the assignment will end and the employee will return to previous position.

Home/Host Classification - Is a defaulted field.

Company Seniority Date - For classified employees, it is the adjusted service date used for layoff purposes.

Benefits Service Date - The actual leave accrual date.

Seniority Pay Cal Date - Field is not at this time by HCSD.

Probation Date - The day an employee obtains permanent status (Civil Service).

Professional Experience Date - Field is not used by HCSD at this time.

Last Verification Date - Field is not used by HCSD at this time.

Business Title - Is a defaulted field based on Job Code.

Anniversary Date - The date the employee is to be evaluated using the PPR process (Civil Service).

Merit Status - Is an optional field used for the automatic merit increase process.

Next Merit Eligibility Date - The date the employee is eligible to receive a merit increase (Civil Service).

Appointment End Date - Date assignment will end.

Contract Length - Field is not used at this time by HCSD.

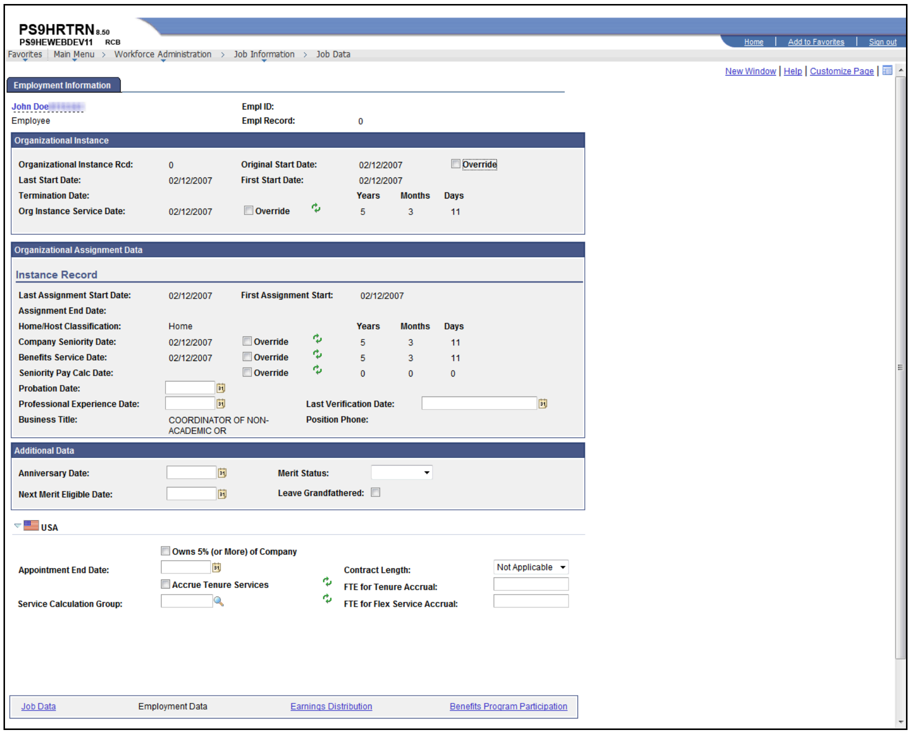
Accrue Tenure Services - Field is not used at this time by HCSD.

FTE For Tenure Accrual - Field is not used at this time by HCSD.

Service Calculation Group - Field is not used at this time by HCSD.

FTE for Flex Service Accrual - Field is not used at this time by HCSD.

Step	Action
22.	The only field used in the USA section is the Appointment End date.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help | Customize Page
Employment Information

John Doe [redacted]
Employee
Empl ID:
Empl Record: 0

Organizational Instance

Organizational Instance Rcd: 0
Original Start Date: 02/12/2007 ☐ Override
Last Start Date: 02/12/2007
First Start Date: 02/12/2007
Termination Date:
Org Instance Service Date: 02/12/2007 ☐ Override — Years 5, Months 3, Days 11

Organizational Assignment Data

Instance Record

Last Assignment Start Date: 02/12/2007
First Assignment Start: 02/12/2007
Assignment End Date:
Home/Host Classification: Home

			Years	Months	Days
Company Seniority Date:	02/12/2007	☐ Override	5	3	11
Benefits Service Date:	02/12/2007	☐ Override	5	3	11
Seniority Pay Calc Date:		☐ Override	0	0	0

Probation Date:
Professional Experience Date:
Last Verification Date:
Business Title: COORDINATOR OF NON-ACADEMIC OR
Position Phone:

Additional Data

Anniversary Date:
Merit Status:
Next Merit Eligible Date:
Leave Grandfathered: ☐

USA

☐ Owns 5% (or More) of Company
Appointment End Date:
Contract Length: Not Applicable
☐ Accrue Tenure Services
FTE for Tenure Accrual:
Service Calculation Group:
FTE for Flex Service Accrual:

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

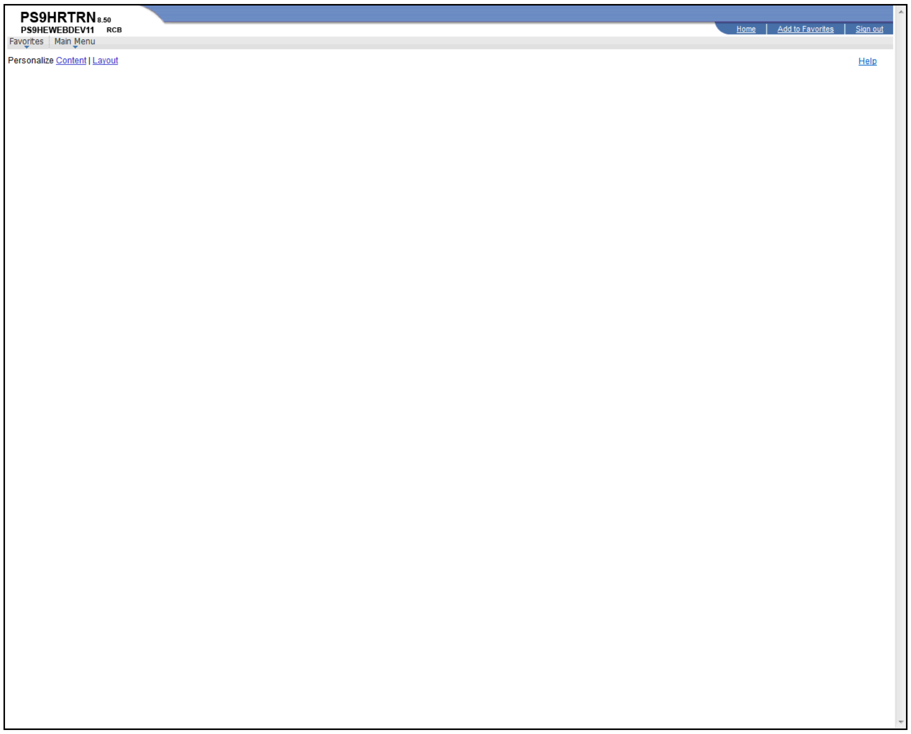
Step	Action
23.	Click the **Benefits Program Participation** link. Benefits Program Participation
24.	**Benefit Program Participant Values:** **FTP** - full/part time employees eligible for certain benefits **NEL** - not eligible for any benefits **FRP** - for residents eligible for certain benefits **RET** - retirees
25.	This completes ***View Job Data***. **End of Procedure.**

View a Job Summary

The Job Summary pages are a snapshot of an employee's LSUHSC employment history. The pages consolidate information including pay rate changes, leaves of absence, promotions, transfers, and more.

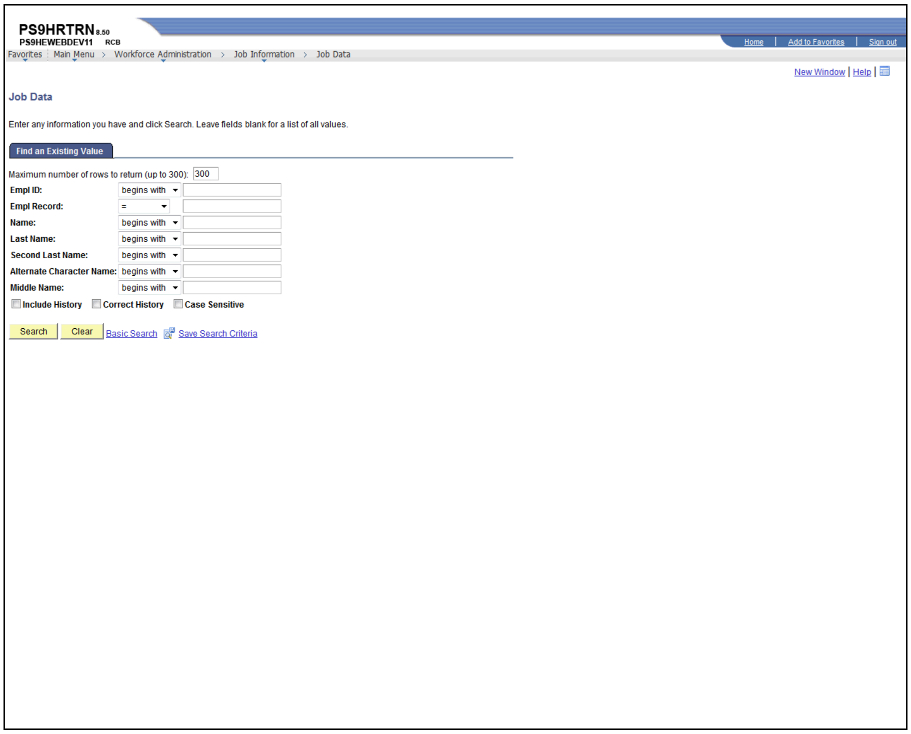
Procedure

In this topic you will learn how to **View a Job Summary**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Workforce Administration** menu. Workforce Administration
3.	Click the **Job Information** menu. Job Information
4.	Click the **Review Job Information** menu. Review Job Information
5.	Click the **Workforce Job Summary** menu. Workforce Job Summary

Step	Action
6.	You can search for an employee using either the EmplID or the Last Name. Using the EmplID is demonstrated in this exercise. To use the Last Name option, simply enter the employee's last name into the Last Name field and then click the Search button. ***NOTE: It is not recommended to use any of the other search fields.***


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Job Data
New Window | Help
Job Data
Find an Existing Value
Search
Clear
Basic Search
Save Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300

Empl ID: begins with

Empl Record: =

Name: begins with

Last Name: begins with

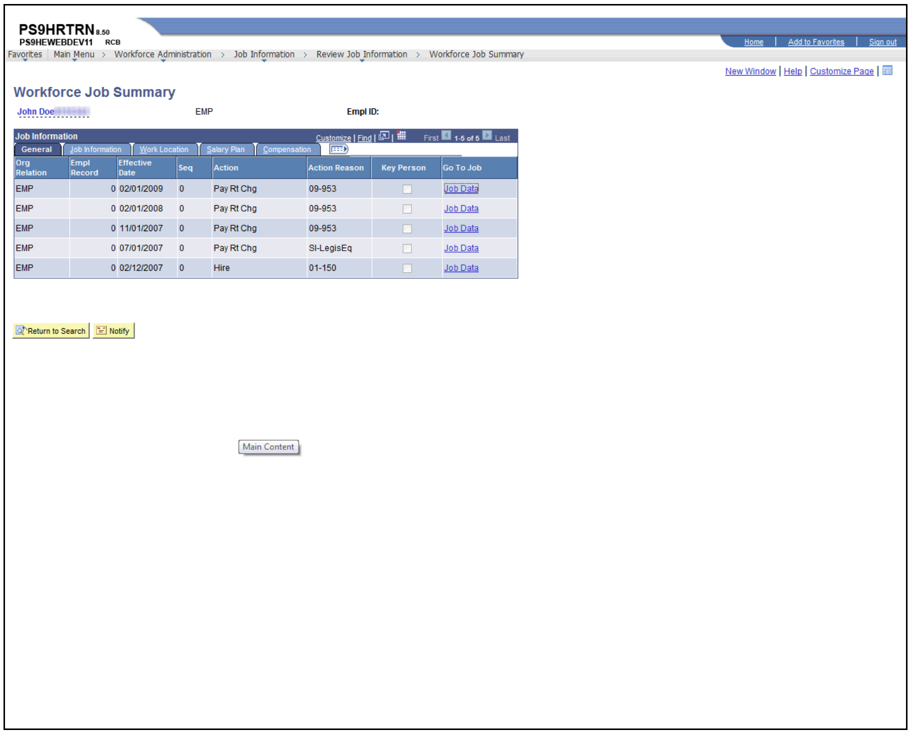
Second Last Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Step	Action
7.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
8.	Click the **Search** button. Search


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary
New Window | Help | Customize Page
Customize | Find | First 1-5 of 5 Last
General | Job Information | Work Location | Salary Plan | Compensation
Return to Search
Notify
Main Content

Workforce Job Summary

John Doe [redacted] EMP Empl ID:

Job Information

Org Relation	Empl Record	Effective Date	Seq	Action	Action Reason	Key Person	Go To Job
EMP	0	02/01/2009	0	Pay Rt Chg	09-953	☐	Job Data
EMP	0	02/01/2008	0	Pay Rt Chg	09-953	☐	Job Data
EMP	0	11/01/2007	0	Pay Rt Chg	09-953	☐	Job Data
EMP	0	07/01/2007	0	Pay Rt Chg	SI-LegisEq	☐	Job Data
EMP	0	02/12/2007	0	Hire	01-150	☐	Job Data

Step	Action
9.	Click the **Job Data** link to access the Job Data panel for that employee. Job Data
10.	Click the other tabs to view additional information on the employee's previous job information.
11.	This completes ***View a Job Summary***. **End of Procedure.**

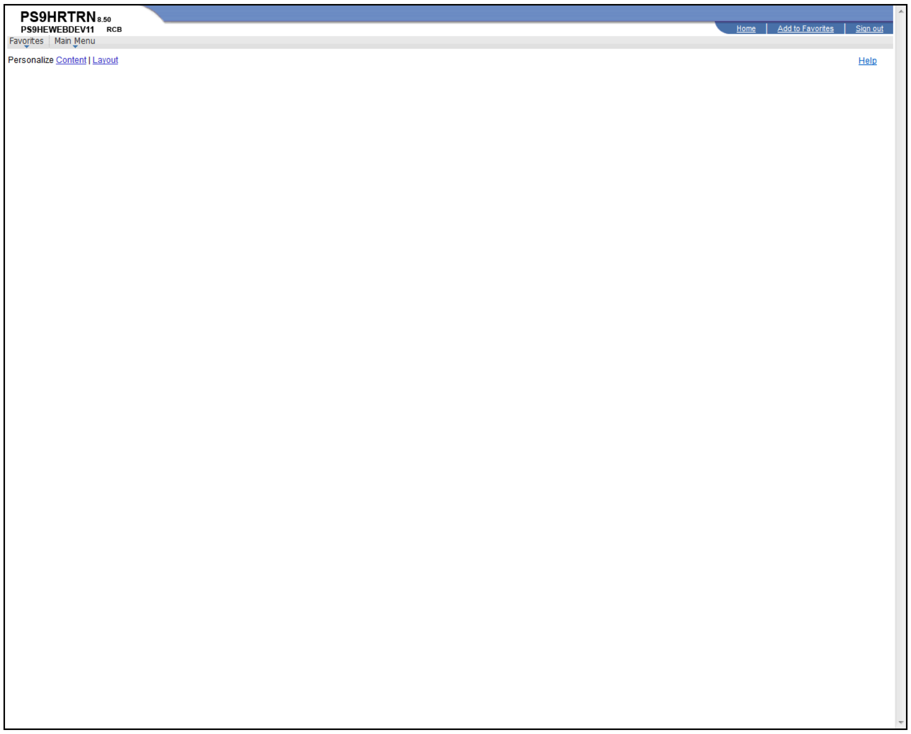
Benefits

Review Accrual Balances

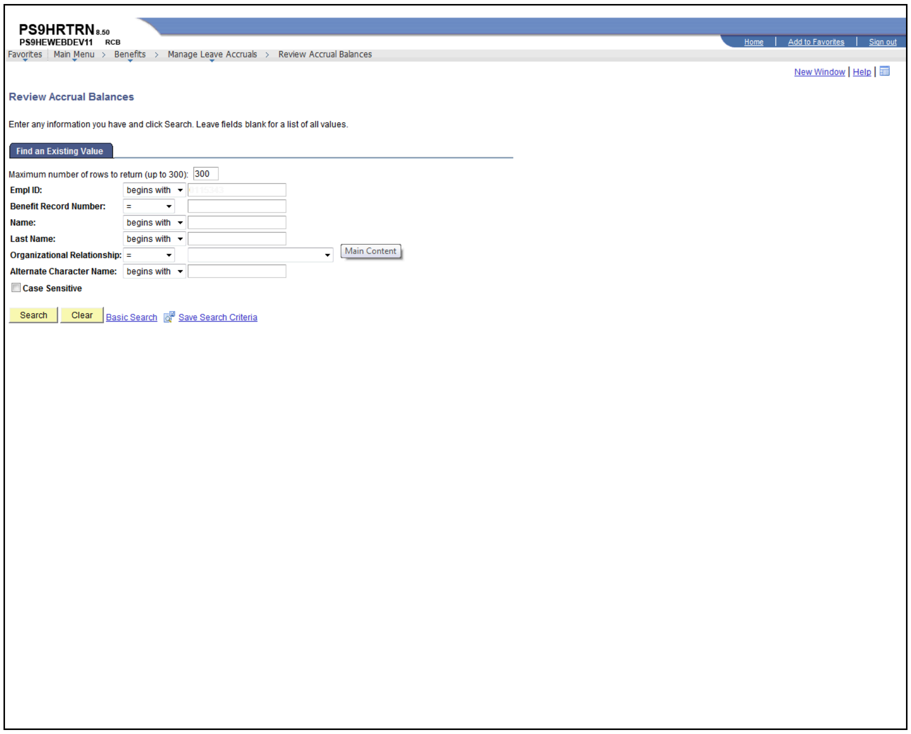
The Review Accrual Balances page allows you to view information on an employee's sick and annual leave accrual.

Procedure

In this topic you will learn how to **Review Accrual Balances**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home
Add to Favorites
Sign out
Favorites
Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Benefits** menu. Benefits
3.	Click the **Manage Leave Accruals** menu. Manage Leave Accruals
4.	Click the **Review Accrual Balances** menu. Review Accrual Balances


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home
Add to Favorites
Sign out
Favorites
Main Menu
Benefits
Manage Leave Accruals
Review Accrual Balances
New Window
Help
Find an Existing Value
Main Content
Search
Clear
Basic Search
Save Search Criteria

Review Accrual Balances

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300

Empl ID: begins with

Benefit Record Number: =

Name: begins with

Last Name: begins with

Organizational Relationship: =

Alternate Character Name: begins with

☐ Case Sensitive

Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
6.	Click the **Search** button. Search
7.	View the Leave Accrual Balances. When you access the Leave Accrual Balances page, the page defaults to the current row of Sick leave accrual.

Leave Accrual Balances Fields:

Company – 01 – New Orleans; 02 – Shreveport; 03 - HCSD

Benefit Program – benefit program to which employee is assigned

Plan Type – refers to type of leave used

Currency - National monetary denomination in which the employee's compensation is paid.

Accrual Date - The leave process date (e.g. the date the employee earns leave, which is the payroll end date). For **Classified Employees**, this date will be the date of the last pay period. For **Unclassified Employees**, this date will be a month before the date of the last pay period.

Accrual Balances - Hours: Hours shown are " **as of** " the calendar year **not** the fiscal year.

Carried Over from previous year - The accrued leave from the previous calendar year.

Earned Year-to-Date - The amount of leave earned for the calendar year.

Taken Year- to -Date - Indicates the leave hours taken for the calendar year.

Adjusted Year-to-Date - Shown if an adjustment has been made (e.g. if payroll runs and leave was not included in the run).

Bought Year-to-Date – N/A

Sold Year-to-Date – N/A

Service Data:
Service Date - Also called the Adjusted Service Date. It is the most important date because this is the leave accrual date; the date the employee begins to earn leave (leave accrual date).

Service Hours - The number of hours used for length-of-service calculations when the service unit is defined as *Hours*.

Unprocessed Data: Will be shown when HR enters Dept. Leave (taken leave or adjusted leave). Once payroll runs, the leave will be shown as processed (**Taken Year-to-Date** or **Adjusted Year-to-Date**) and the Unprocessed Data field will be blank.

Hours Taken – Number of hours used.

Hours Adjusted – Unprocessed hours.

Hours Bought – N/A

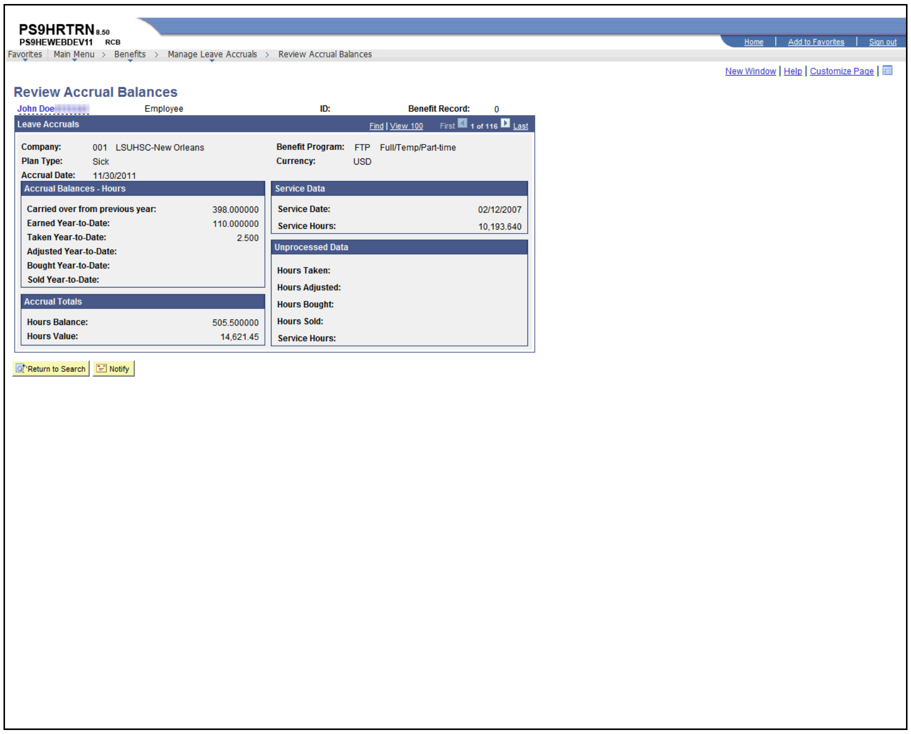
Hours Sold – N/A

Service Hours - The number of hours used for length-of-service calculations when the service unit is defined as *Hours.*

Accrual Total:

Hours Balance - The employee's current accrued time available.

Hours Value - Current monetary value of the hours balance.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Benefits > Manage Leave Accruals > Review Accrual Balances
New Window | Help | Customize Page

Review Accrual Balances

John Doe [redacted] Employee ID: Benefit Record: 0

Leave Accruals Find | View 100 First 1 of 116 Last

Company: 001 LSUHSC-New Orleans
Benefit Program: FTP Full/Temp/Part-time
Plan Type: Sick
Currency: USD
Accrual Date: 11/30/2011

Accrual Balances - Hours

Carried over from previous year: 398.000000
Earned Year-to-Date: 110.000000
Taken Year-to-Date: 2.500
Adjusted Year-to-Date:
Bought Year-to-Date:
Sold Year-to-Date:

Service Data

Service Date: 02/12/2007
Service Hours: 10,193.640

Unprocessed Data

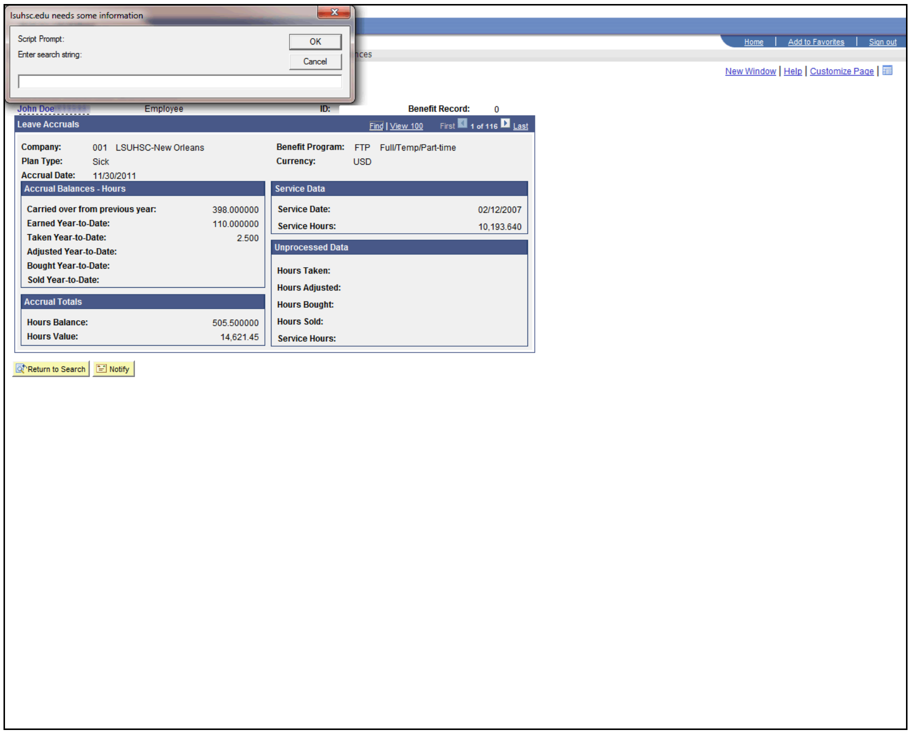
Hours Taken:
Hours Adjusted:
Hours Bought:
Hours Sold:
Service Hours:

Accrual Totals

Hours Balance: 505.500000
Hours Value: 14,621.45

Return to Search
Notify

Step	Action
8.	Vacation accrual rows may be viewed by selecting one of the following methods: 1. Click the Scroll Areas to scroll through Sick and Vacation rows of accrual (this also allows you to view previous row of sick leave and vacation accruals); 2. Click the View All link and use the scroll bar that appears on the right side of the page to scroll through Sick and Vacation rows of accruals; 3. Click the Find link to directly access the current row of Vacation accrual (we will use this method in the next step). Click the **Find** link. Find


lsuhsc.edu needs some information
OK
Cancel
Home
Add to Favorites
Sign out
New Window
Help
Customize Page
Return to Search
Notify

Script Prompt:
Enter search string:

John Doe Employee ID: Benefit Record: 0

Leave Accruals Find | View 100 First 1 of 116 Last

Company: 001 LSUHSC-New Orleans
Benefit Program: FTP Full/Temp/Part-time
Plan Type: Sick
Currency: USD
Accrual Date: 11/30/2011

Accrual Balances - Hours

Carried over from previous year:	398.000000
Earned Year-to-Date:	110.000000
Taken Year-to-Date:	2.500
Adjusted Year-to-Date:	
Bought Year-to-Date:	
Sold Year-to-Date:	

Accrual Totals

Hours Balance:	505.500000
Hours Value:	14,621.45

Service Data

Service Date:	02/12/2007
Service Hours:	10,193.640

Unprocessed Data

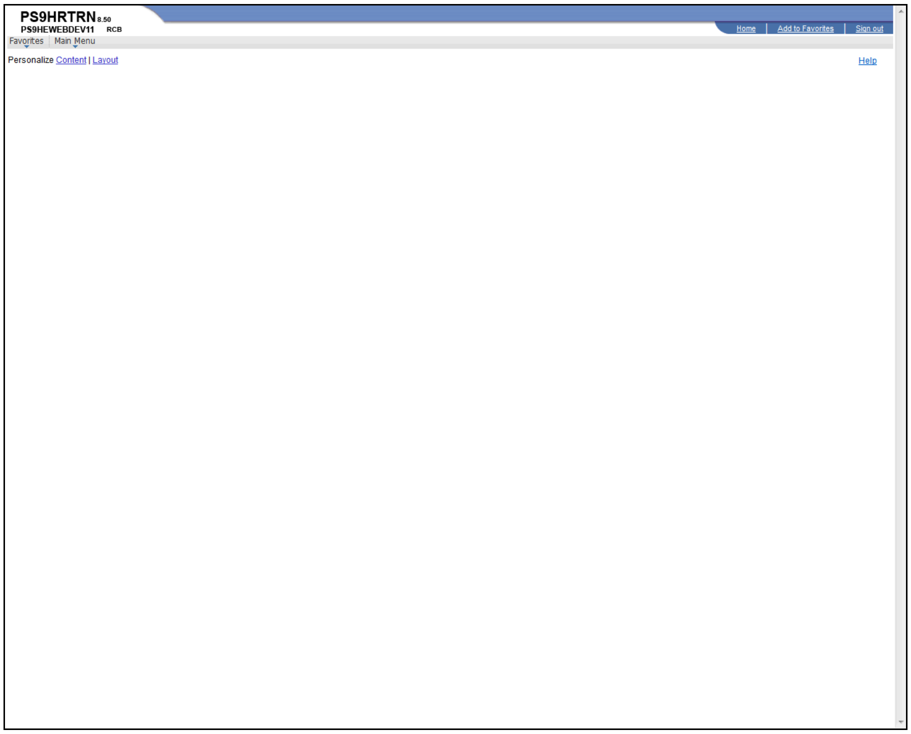
Hours Taken:	
Hours Adjusted:	
Hours Bought:	
Hours Sold:	
Service Hours:	

Step	Action
9.	Enter the desired information into the field. Enter "**vacation**".
10.	Click the **OK** button. OK
11.	The current Vacation row displays. You may use the Scroll Areas to view history rows of Vacation accruals.
12.	This completes ***Review Accrual Balances***. **End of Procedure.**

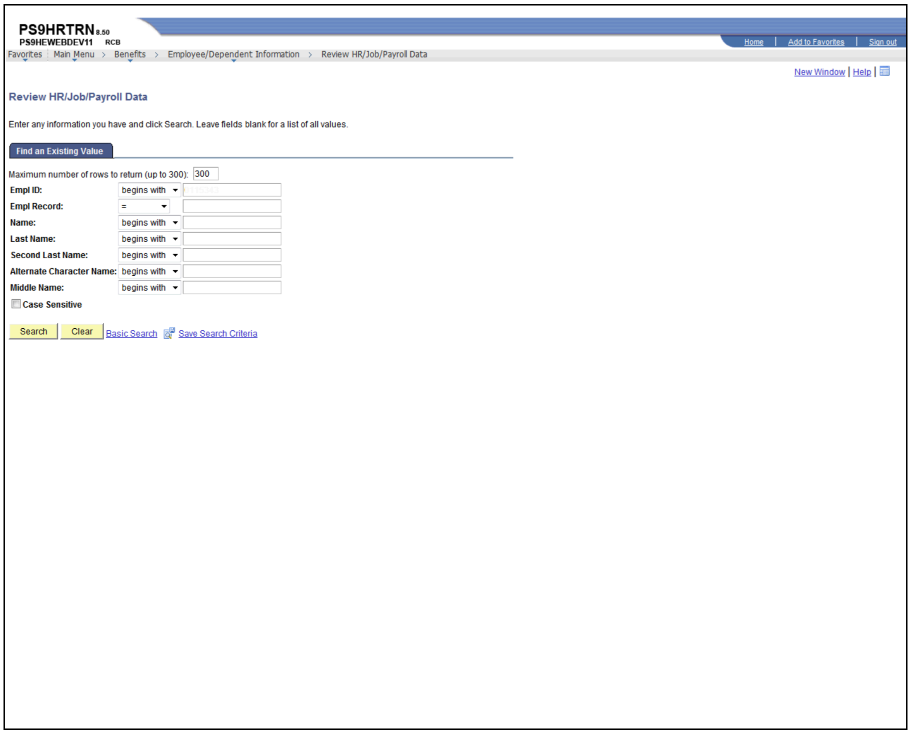
Review Employee Data Summary

Procedure

In this topic you will learn how to **Review Employee Data Summary**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home
Add to Favorites
Sign out
Favorites
Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button.
2.	Click the **Benefits** menu.
3.	Click the **Employee/Dependent Information** menu.
4.	Click the **Review HR/Job/Payroll Data** menu.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Benefits > Employee/Dependent Information > Review HR/Job/Payroll Data
New Window | Help

Review HR/Job/Payroll Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

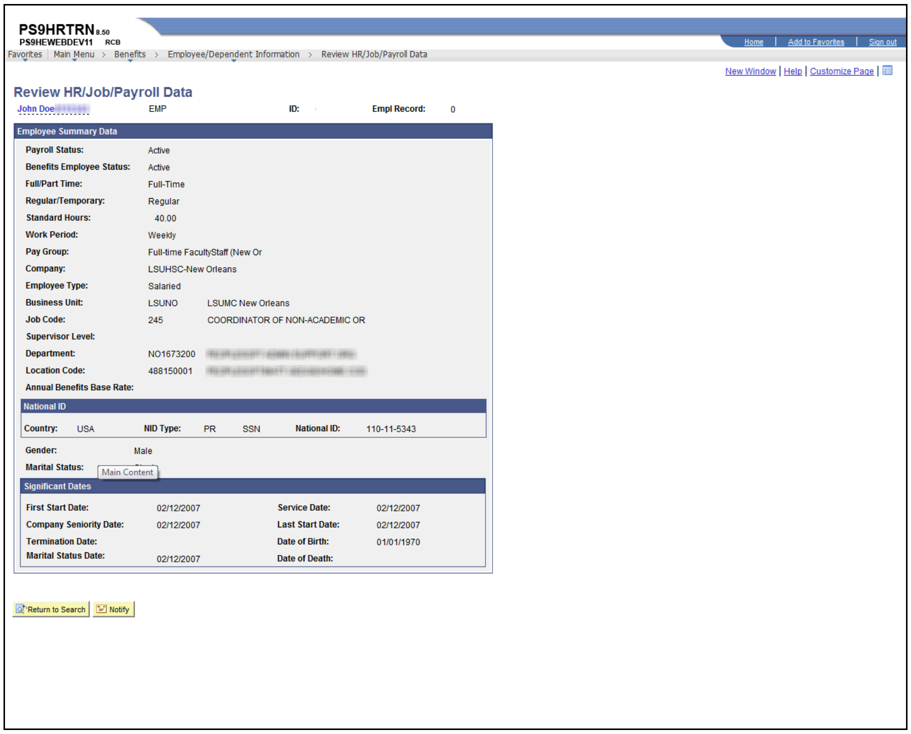
Maximum number of rows to return (up to 300): 300

Empl ID:	begins with	
Empl Record:	=	
Name:	begins with	
Last Name:	begins with	
Second Last Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☐ Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
6.	Click the **Search** button. Search


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Benefits > Employee/Dependent Information > Review HR/Job/Payroll Data
New Window | Help | Customize Page
Main Content
Return to Search
Notify

Review HR/Job/Payroll Data

John Doe [redacted] EMP ID: Empl Record: 0

Employee Summary Data

Payroll Status: Active
Benefits Employee Status: Active
Full/Part Time: Full-Time
Regular/Temporary: Regular
Standard Hours: 40.00
Work Period: Weekly
Pay Group: Full-time FacultyStaff (New Or
Company: LSUHSC-New Orleans
Employee Type: Salaried
Business Unit: LSUNO LSUMC New Orleans
Job Code: 245 COORDINATOR OF NON-ACADEMIC OR
Supervisor Level:
Department: NO1673200 [redacted]
Location Code: 488150001 [redacted]
Annual Benefits Base Rate:

National ID

Country: USA NID Type: PR SSN National ID: 110-11-5343

Gender: Male
Marital Status:

Significant Dates

First Start Date:	02/12/2007	Service Date:	02/12/2007
Company Seniority Date:	02/12/2007	Last Start Date:	02/12/2007
Termination Date:		Date of Birth:	01/01/1970
Marital Status Date:	02/12/2007	Date of Death:	

Step	Action
7.	View the Review HR/Job/Payroll Data page. Click the **Return to Search** button. Return to Search
8.	This completes ***Review Employee Data Summary***. **End of Procedure.**

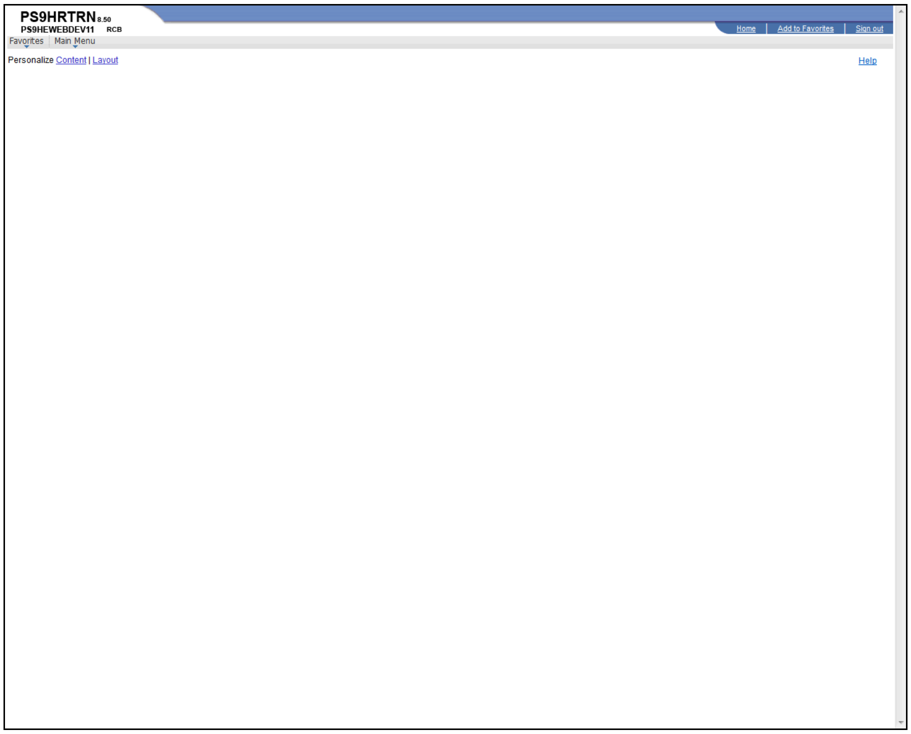
Payroll for North America

Review Paycheck Summary

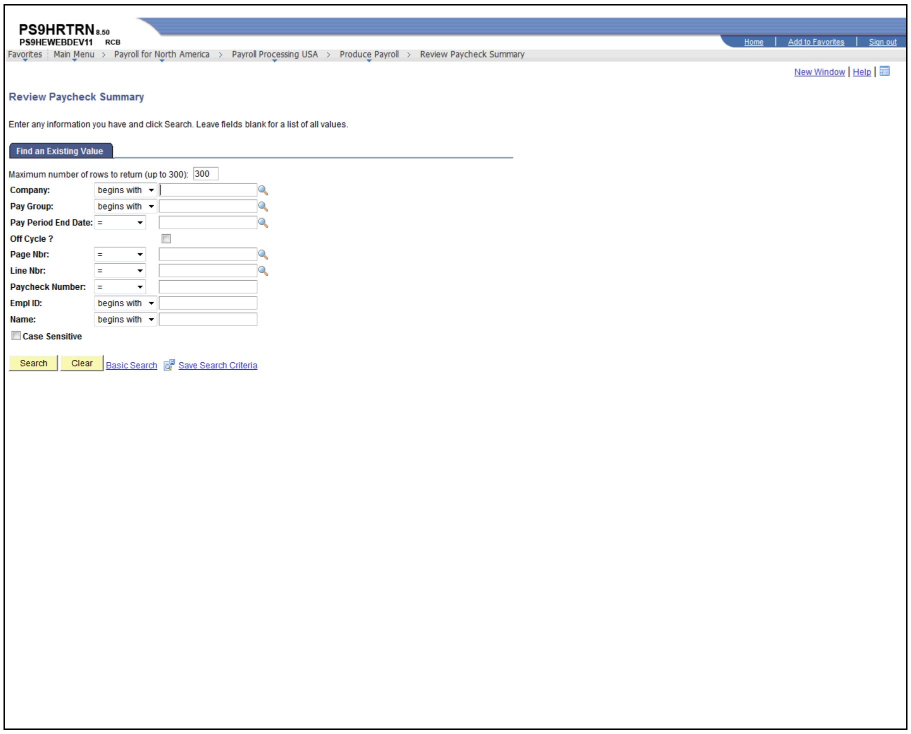
The Paycheck Summary page for an employee displays information such as earnings, taxes and deductions for a single paycheck.

Procedure

In this topic you will learn how to **Review Paycheck Summary**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home
Add to Favorites
Sign out
Favorites
Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Payroll for North America** menu. Payroll for North America
3.	Click the **Payroll Processing USA** menu. Payroll Processing USA
4.	Click the **Produce Payroll** menu. Produce Payroll
5.	Click the **Review Paycheck Summary** menu. Review Paycheck Summary

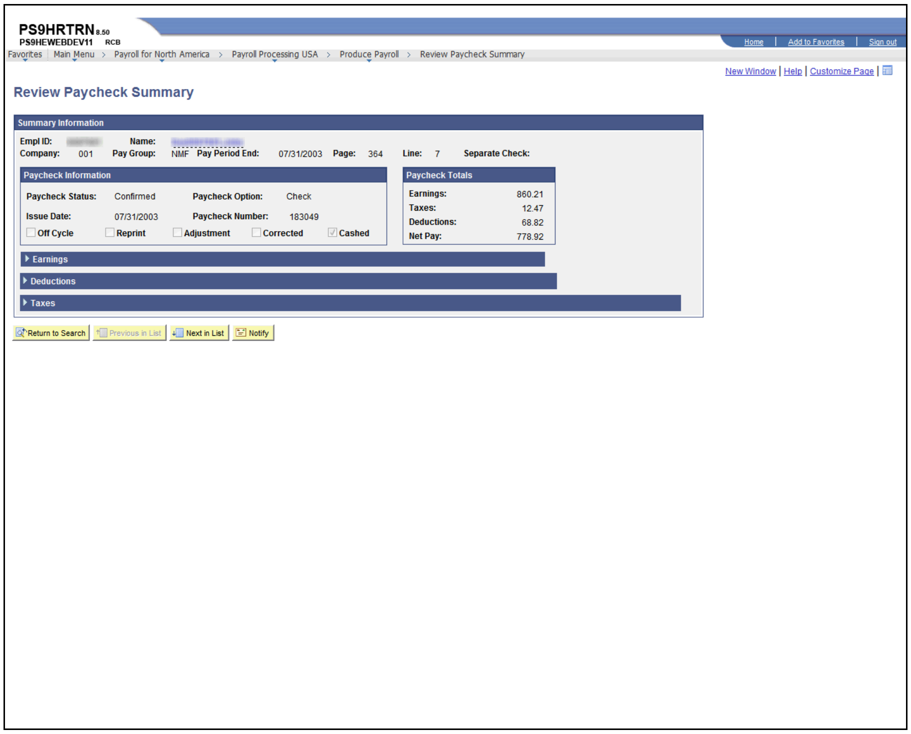

PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary
New Window | Help |
Find an Existing Value
Search
Clear
Basic Search
Save Search Criteria

Review Paycheck Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300
Company: begins with
Pay Group: begins with
Pay Period End Date: =
Off Cycle ? ☐
Page Nbr: =
Line Nbr: =
Paycheck Number: =
Empl ID: begins with
Name: begins with
☐ Case Sensitive

Step	Action
6.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Emplolyee ID Number**".
7.	Click the **Search** button. Search
8.	All paychecks for an employee will be displayed with the most recent at the top. the end-user should, therefore, take note of the pay end date, when attempting to view a paycheck. Click the **Paycheck** link from the Search Results table. 07/31/2003


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary
New Window | Help | Customize Page
Return to Search
Previous in List
Next in List
Notify

Review Paycheck Summary

Summary Information

Empl ID: [redacted] Name: [redacted]
Company: 001 Pay Group: NMF Pay Period End: 07/31/2003 Page: 364 Line: 7 Separate Check:

Paycheck Information

Paycheck Status: Confirmed Paycheck Option: Check
Issue Date: 07/31/2003 Paycheck Number: 183049
☐ Off Cycle ☐ Reprint ☐ Adjustment ☐ Corrected ☑ Cashed

Paycheck Totals

Earnings:	860.21
Taxes:	12.47
Deductions:	68.82
Net Pay:	778.92

▶ Earnings

▶ Deductions

▶ Taxes

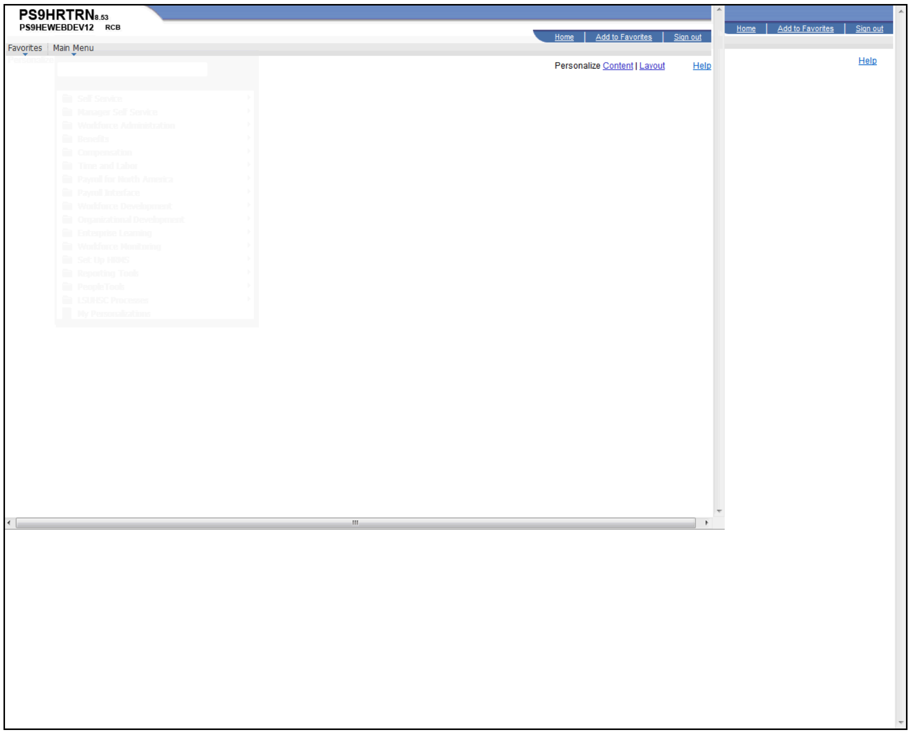
Step	Action
9.	The information shown on this page summarizes information appearing on the paycheck or the pay advice (direct deposit) statement. Check # is the Check Number or Advice Number (i.e. employees who have direct deposit). Click the **Expand** section button to view the **Earnings** section. ▶
10.	Click the Expand section button to view the **Deductions** section. ▶
11.	Click the **Taxes** button to view the Taxes associated with this check. ▶
12.	This completes ***Review Paycheck Summary***. **End of Procedure.**

Review Actuals Distribution

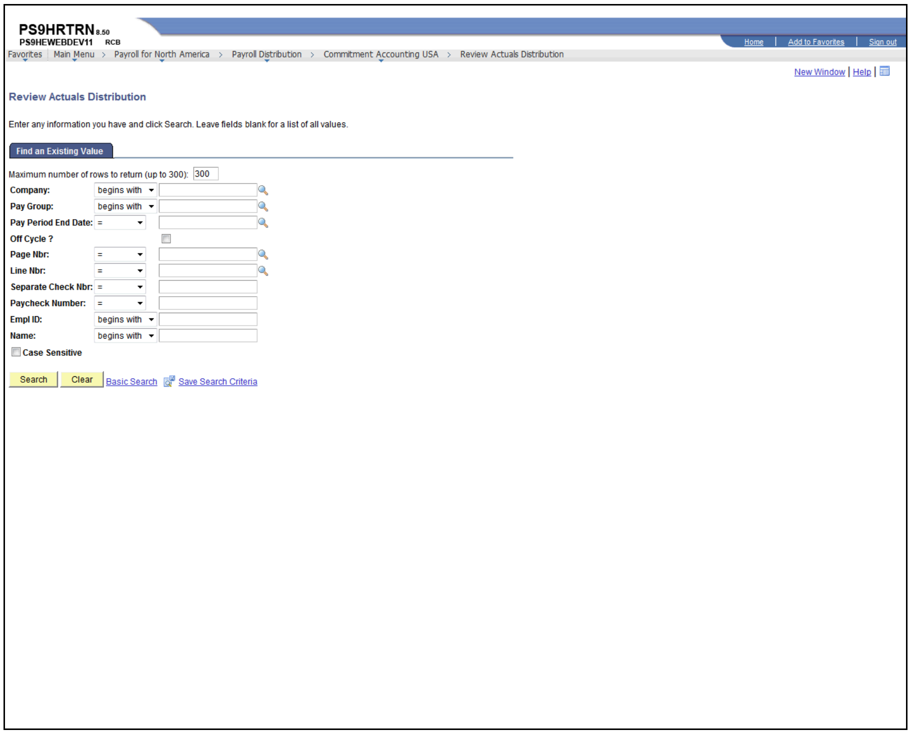
Actuals Distribution displays the funding sources for a specific paycheck of an employee.

Procedure

In this topic you will learn how to **Review Actuals Distribution**.


PS9HRTRN8.53
PS9HEWEBDEV12 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu
Personalize Content | Layout
Help
Self Service
Manager Self Service
Workforce Administration
Benefits
Compensation
Time and Labor
Payroll for North America
Payroll Interface
Workforce Development
Organizational Development
Enterprise Learning
Workforce Monitoring
Set Up HRMS
Reporting Tools
PeopleTools
LSUHSC Processes
My Personalizations

Step	Action
1.	Click the **Main Menu** button.
2.	Click the **Payroll for North America** menu. Payroll for North America
3.	Click the **Payroll Distribution** menu. Payroll Distribution
4.	Click the **Commitment Accounting USA** menu. Commitment Accounting USA
5.	Click the **Review Actuals Distribution** menu. Review Actuals Distribution


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Payroll for North America > Payroll Distribution > Commitment Accounting USA > Review Actuals Distribution
New Window | Help
Find an Existing Value
Search
Clear
Basic Search
Save Search Criteria

Review Actuals Distribution

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300
Company: begins with
Pay Group: begins with
Pay Period End Date: =
Off Cycle ? ☐
Page Nbr: =
Line Nbr: =
Separate Check Nbr: =
Paycheck Number: =
Empl ID: begins with
Name: begins with
☐ Case Sensitive

Step	Action
6.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
7.	Click the **Search** button. Search
8.	All paychecks for an employee will be displayed with the most recent at the top. The end-user should, therefore, take note of the Pay Period End Date, when attempting to view a paycheck. Click the **001** link.
9.	The Earnings page identifies the account(s) to which the employee's pay is being charged.
10.	This completes ***Review Actuals Distribution***. **End of Procedure.**

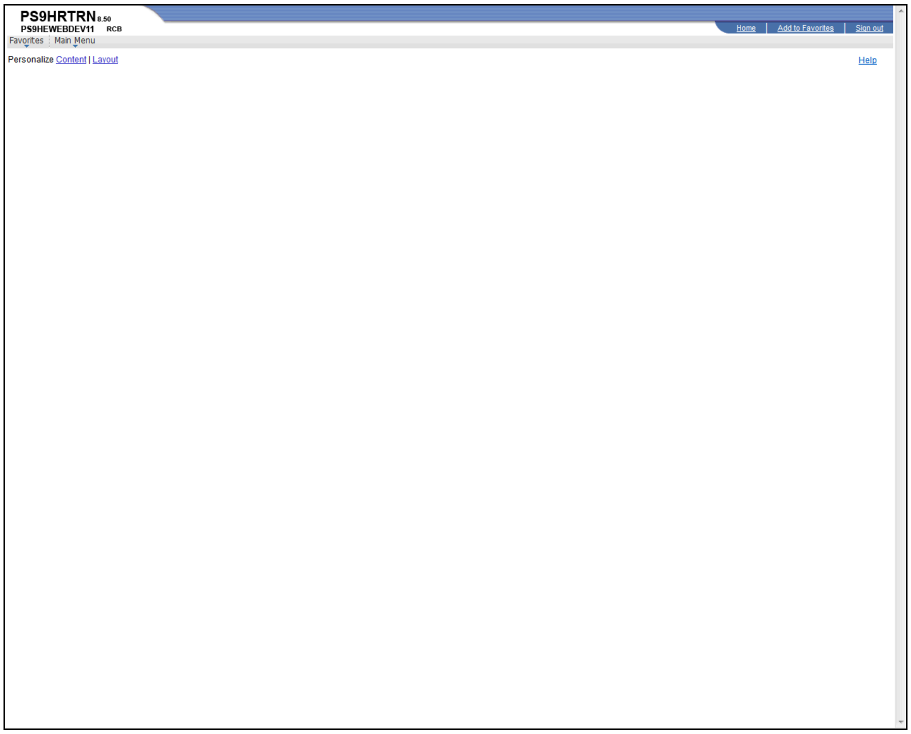
Review Additional Pay

Information regarding an employee's earnings that are paid in addition to regular base pay can be found in Maintain Payroll Data on the **Additional Pay** pages, if the additional pay is processed as a recurring payment, with an end date. It is supplemental pay (usually to faculty), set on a recurring basis, only. It is, occasionally, used for a one-time supplement.

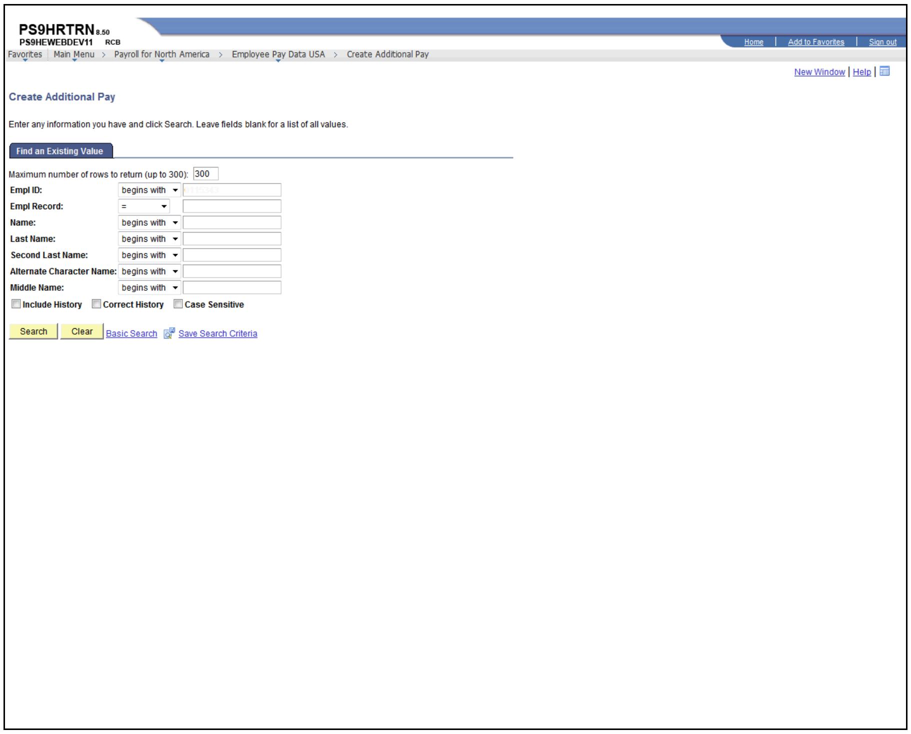
All payments of additional compensation are not necessarily entered on the Additional Pay pages. They are not in the Additional Pay pages if they are entered directly on the pay line.

Procedure

In this topic you will learn how to **Review Additional Pay**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home
Add to Favorites
Sign out
Favorites
Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button.
2.	Click the **Payroll for North America** menu. Payroll for North America
3.	Click the **Employee Pay Data USA** menu. Employee Pay Data USA
4.	Click the **Create Additional Pay** menu. Create Additional Pay



PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay
New Window | Help

Create Additional Pay

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

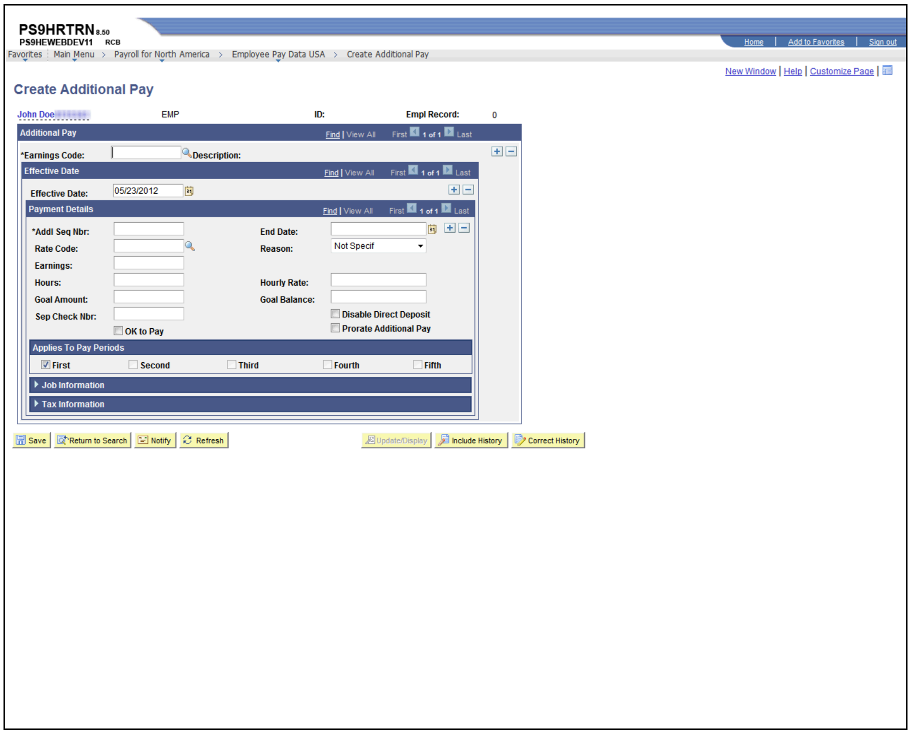
Maximum number of rows to return (up to 300): 300

Empl ID:	begins with	0115343
Empl Record:	=	
Name:	begins with	
Last Name:	begins with	
Second Last Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☐ **Include History** ☐ **Correct History** ☐ **Case Sensitive**

Search
Clear
Basic Search
Save Search Criteria

Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
6.	Click the **Search** button. Search


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay
New Window | Help | Customize Page
Additional Pay
Find | View All First 1 of 1 Last
Effective Date
Payment Details
Applies To Pay Periods
Job Information
Tax Information
Save
Return to Search
Notify
Refresh
Update/Display
Include History
Correct History

Create Additional Pay

John Doe [redacted] EMP ID: Empl Record: 0

*Earnings Code: Description:

Effective Date: 05/23/2012

*Addl Seq Nbr:
Rate Code:
Earnings:
Hours:
Goal Amount:
Sep Check Nbr:
☐ OK to Pay
End Date:
Reason: Not Specif
Hourly Rate:
Goal Balance:
☐ Disable Direct Deposit
☐ Prorate Additional Pay

☑ First ☐ Second ☐ Third ☐ Fourth ☐ Fifth

Step	Action
7.	Click the **Expand** button for the Job Information section. ▶
8.	Click the **Collapse** button for the Job Information section. ▼
9.	Click the **Expand** button for the Tax Information section. ▶
10.	Click the **Collapse** button for the Tax Information section. ▼
11.	This completes ***Review Additional Pay***. **End of Procedure.**

Organizational Development

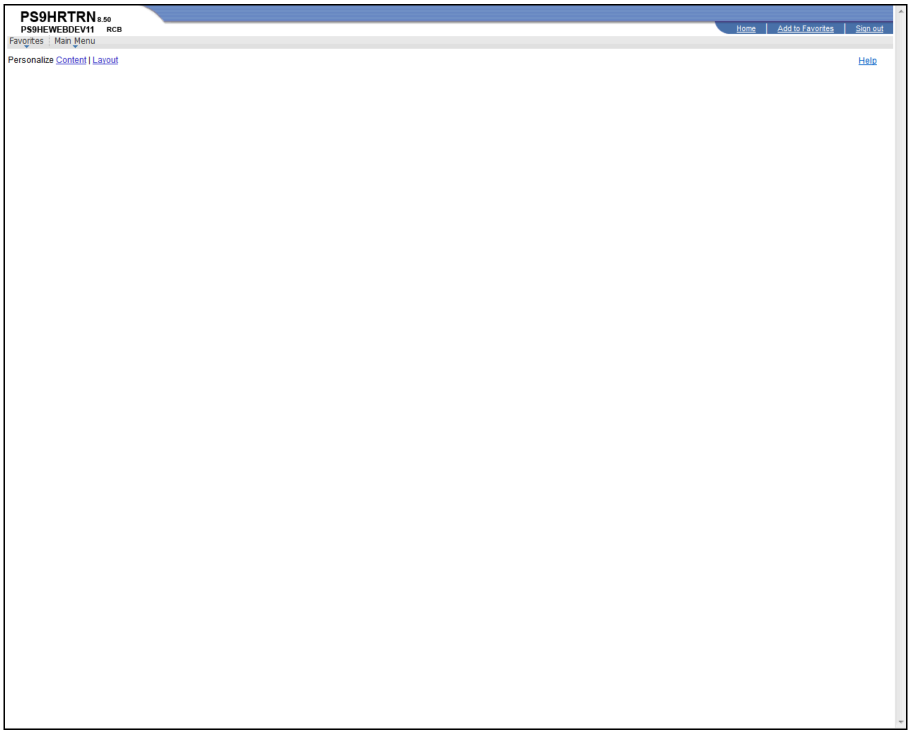
Position Data consists of information (such as job code, Department ID, location code, and pay group) directly associated with a position. Every employee in the institution has a position in PeopleSoft. When an employee fills a position or transfers to another position, he or she inherits all of the data from that position.

Many of the fields found on the pages of the Manage Positions components are contained in the Job Data pages. After a position is approved, it is input into the system by Human Resources. Once someone is hired, the data from the Manage Positions pages automatically populate to the Job Data pages.

Manage Positions

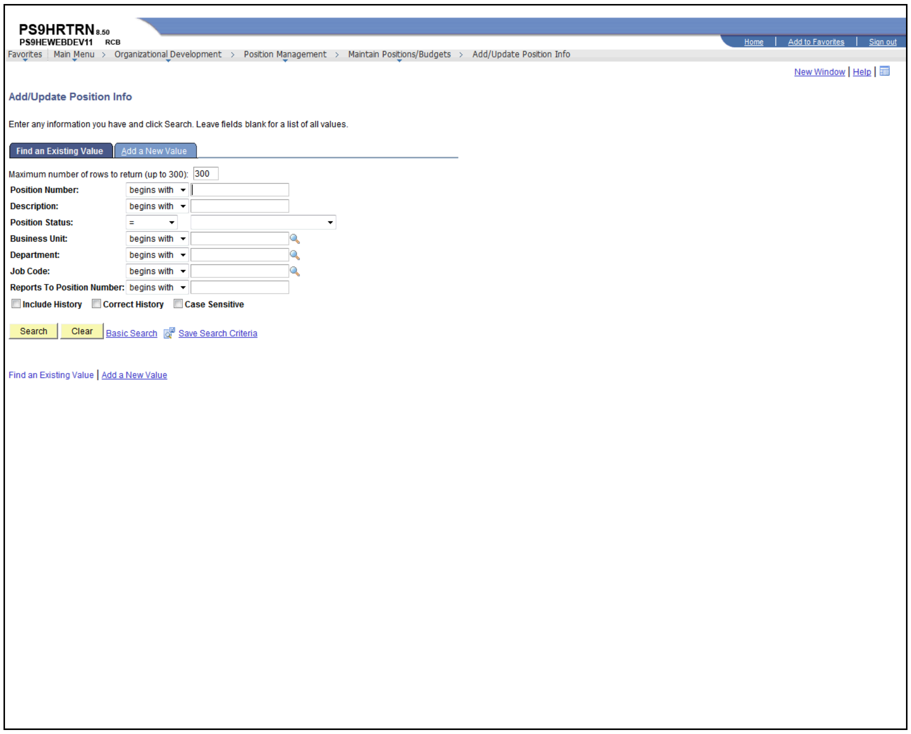
Procedure

In this topic you will learn how to **Manage Positions**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home
Add to Favorites
Sign out
Favorites
Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Organizational Development** menu. Organizational Development
3.	Click the **Position Management** menu. Position Management

Step	Action
4.	Click the **Maintain Positions/Budgets** menu. Maintain Positions/Budgets
5.	Click the **Add/Update Position Info** menu. Add/Update Position Info


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
New Window | Help |
Find an Existing Value
Add a New Value
Search
Clear
Basic Search
Save Search Criteria
Find an Existing Value | Add a New Value

Add/Update Position Info

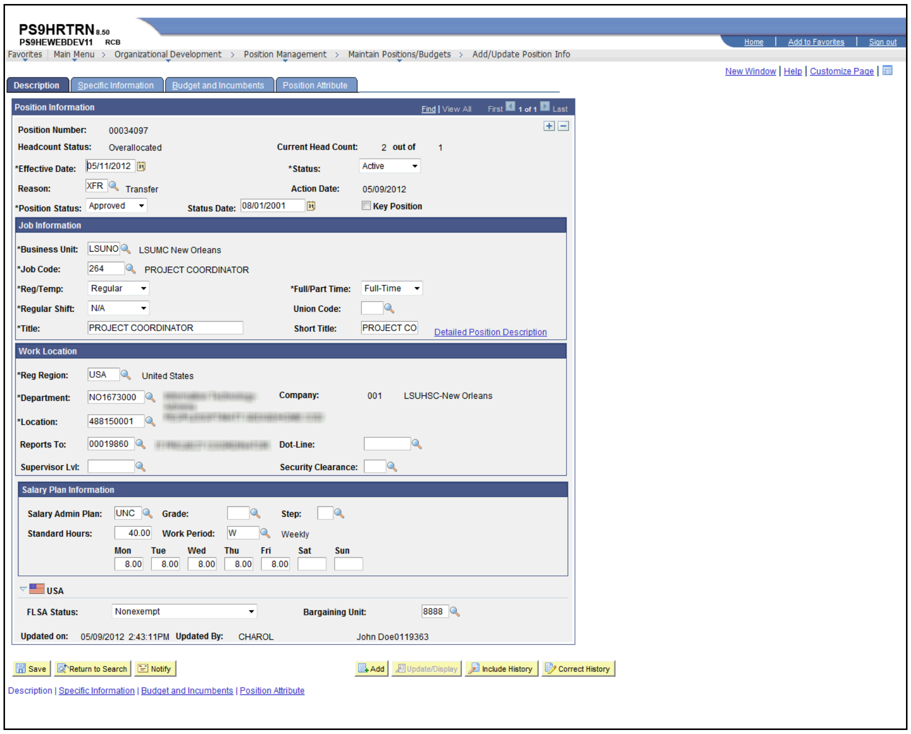
Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300

Position Number:	begins with	
Description:	begins with	
Position Status:	=	
Business Unit:	begins with	
Department:	begins with	
Job Code:	begins with	
Reports To Position Number:	begins with	

☐ **Include History** ☐ **Correct History** ☐ **Case Sensitive**

Step	Action
6.	The Position Number is an 8-digit number, including the preceding zeros. The Position Number can be found on the Work Location page of the Job Data component. Enter the desired information into the **Position Number** field. Enter "**8-digit Position Number**".
7.	Click the **Search** button. Search


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
New Window | Help | Customize Page
Description
Specific Information
Budget and Incumbents
Position Attribute
Find | View All First 1 of 1 Last
Save
Return to Search
Notify
Add
Update/Display
Include History
Correct History
Description | Specific Information | Budget and Incumbents | Position Attribute

Position Information

Position Number: 00034097
Headcount Status: Overallocated
Current Head Count: 2 out of 1
*Effective Date: 05/11/2012
*Status: Active
Reason: XFR Transfer
Action Date: 05/09/2012
*Position Status: Approved
Status Date: 08/01/2001
☐ Key Position

Job Information

*Business Unit: LSUNO LSUMC New Orleans
*Job Code: 264 PROJECT COORDINATOR
*Reg/Temp: Regular
*Full/Part Time: Full-Time
*Regular Shift: N/A
Union Code:
*Title: PROJECT COORDINATOR
Short Title: PROJECT CO
Detailed Position Description

Work Location

*Reg Region: USA United States
*Department: NO1673000 [redacted]
Company: 001 LSUHSC-New Orleans
*Location: 488150001 [redacted]
Reports To: 00019860 [redacted]
Dot-Line:
Supervisor Lvl:
Security Clearance:

Salary Plan Information

Salary Admin Plan: UNC
Grade:
Step:
Standard Hours: 40.00
Work Period: W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

FLSA Status: Nonexempt
Bargaining Unit: 8888

Updated on: 05/09/2012 2:43:11PM Updated By: CHAROL John Doe0119363

Step	Action
8.	Click the **Detailed Position Description** link to view more of the position description. Detailed Position Description

Description Tab:

Position Number - An auto-assigned number. Every employee is given a Position Number.

Headcount Status - Indicates whether or not an employee holds the position (Filled).

Current Head Count - The number of people currently in the position.

Effective Date - Shows the data an action/reason begins. An effective date of 1901 indicates this information was brought over during the conversion to PeopleSoft.

Status - Refers to the position **not** the employee.

Reason - What occurred to the position (e.g. to track history).

Action Date - The date of input of the action.

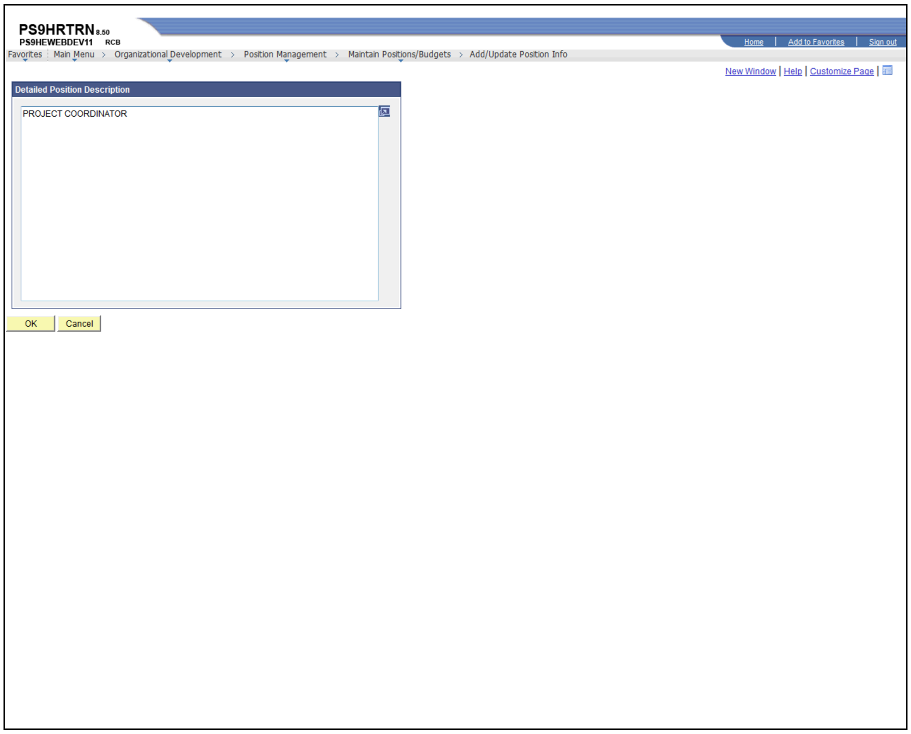
Position Status – Indicates if a position has been approved for hire.

Status Date - Date the action began.

Key Position – N/A

Dot-Line - Is not used at this time.

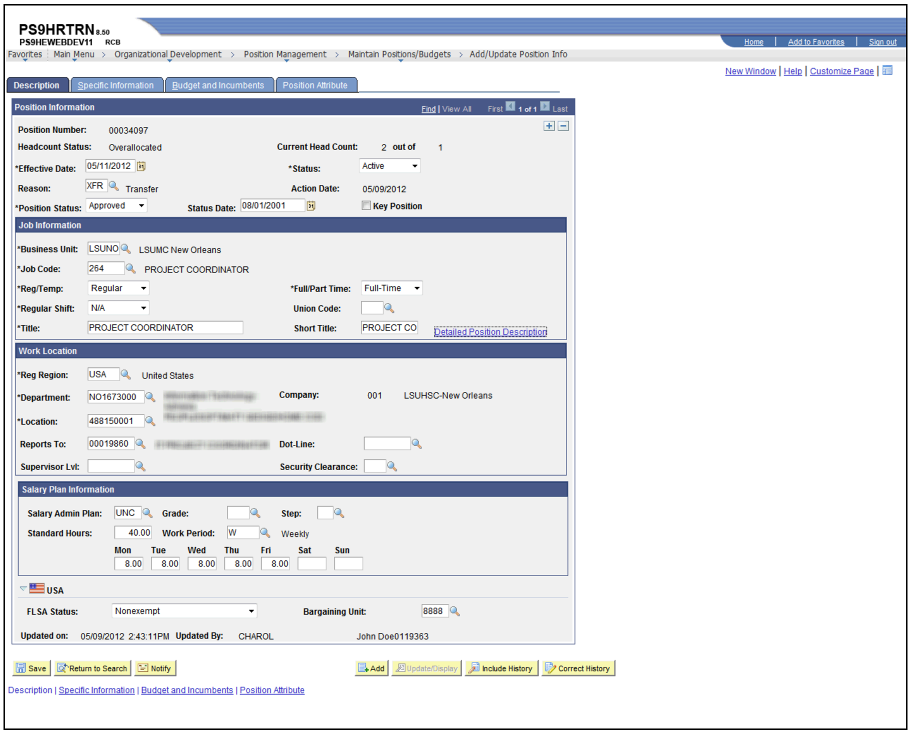
Security Clearance - Is not used at this time.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
New Window | Help | Customize Page
OK
Cancel

Detailed Position Description

PROJECT COORDINATOR

Step	Action
9.	Click the **OK** button. OK


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
New Window | Help | Customize Page
Description
Specific Information
Budget and Incumbents
Position Attribute
Find | View All First 1 of 1 Last
Save
Return to Search
Notify
Add
Update/Display
Include History
Correct History
Description | Specific Information | Budget and Incumbents | Position Attribute

Position Information

Position Number: 00034097
Headcount Status: Overallocated
Current Head Count: 2 out of 1
*Effective Date: 05/11/2012
*Status: Active
Reason: XFR Transfer
Action Date: 05/09/2012
*Position Status: Approved
Status Date: 08/01/2001
☐ Key Position

Job Information

*Business Unit: LSUNO LSUMC New Orleans
*Job Code: 264 PROJECT COORDINATOR
*Reg/Temp: Regular
*Full/Part Time: Full-Time
*Regular Shift: N/A
Union Code:
*Title: PROJECT COORDINATOR
Short Title: PROJECT CO
Detailed Position Description

Work Location

*Reg Region: USA United States
*Department: NO1673000 [redacted]
Company: 001 LSUHSC-New Orleans
*Location: 488150001 [redacted]
Reports To: 00019860 [redacted]
Dot-Line:
Supervisor Lvl:
Security Clearance:

Salary Plan Information

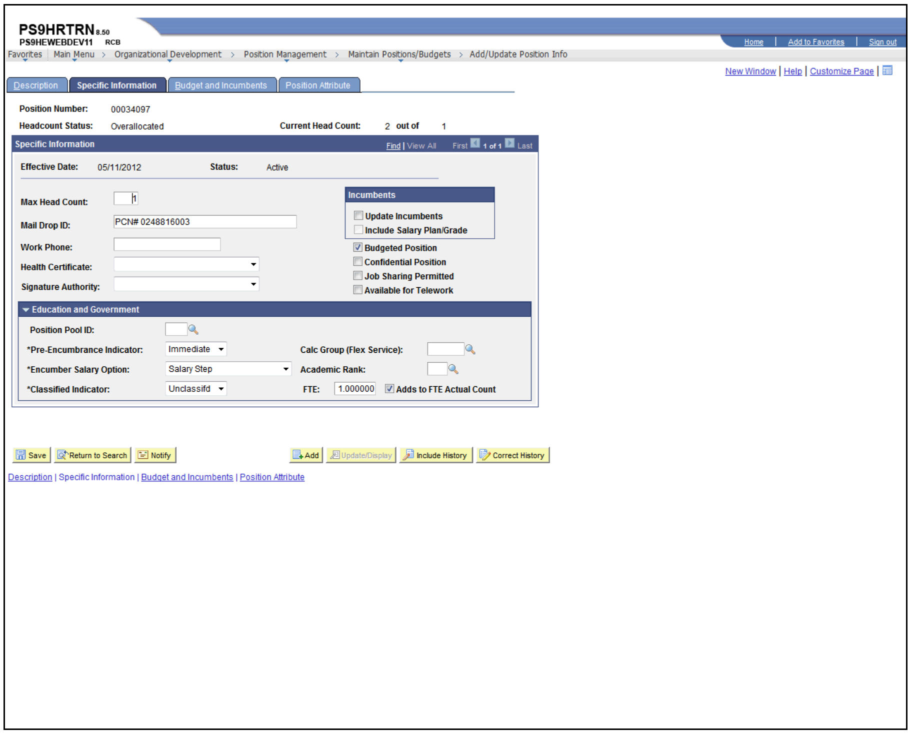
Salary Admin Plan: UNC
Grade:
Step:
Standard Hours: 40.00
Work Period: W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

FLSA Status: Nonexempt
Bargaining Unit: 8888
Updated on: 05/09/2012 2:43:11PM Updated By: CHAROL John Doe0119363

Step	Action
10.	Click the **Specific Information** tab. Specific Information


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
New Window | Help | Customize Page
Description
Specific Information
Budget and Incumbents
Position Attribute
Specific Information
Find | View All First 1 of 1 Last
Incumbents
Education and Government
Save
Return to Search
Notify
Add
Update/Display
Include History
Correct History
Description | Specific Information | Budget and Incumbents | Position Attribute

Position Number: 00034097
Headcount Status: Overallocated
Current Head Count: 2 out of 1
Effective Date: 05/11/2012
Status: Active
Max Head Count: 1
Mail Drop ID: PCN# 0248816003
Work Phone:
Health Certificate:
Signature Authority:
☐ Update Incumbents
☐ Include Salary Plan/Grade
☑ Budgeted Position
☐ Confidential Position
☐ Job Sharing Permitted
☐ Available for Telework
Position Pool ID:
*Pre-Encumbrance Indicator: Immediate
*Encumber Salary Option: Salary Step
*Classified Indicator: Unclassifd
Calc Group (Flex Service):
Academic Rank:
FTE: 1.000000
☑ Adds to FTE Actual Count

Step	Action
11.	Click the **Budget and Incumbents** tab. Budget and Incumbents

Specific Information Tab:

Position Number - Numerical code assigned to a job.

Headcount Status – Position type.

Current Headcount - Current number of employee's within the position.

Effective Date - Date the action began.

Status – Whether position is active or inactive.

Max Head Count - The maximum number of employees who may hold that position at one time.

Update Incumbents - List of employees currently in position.

Include Salary Plan/Grade – N/A

Mail Drop ID - May consist of the Civil Service position number, if applicable. The Civil Service position number is commonly known as the CSO2# or the SAP number. This may not appear on the page. It was used during the transaction from the old legacy system to PeopleSoft.

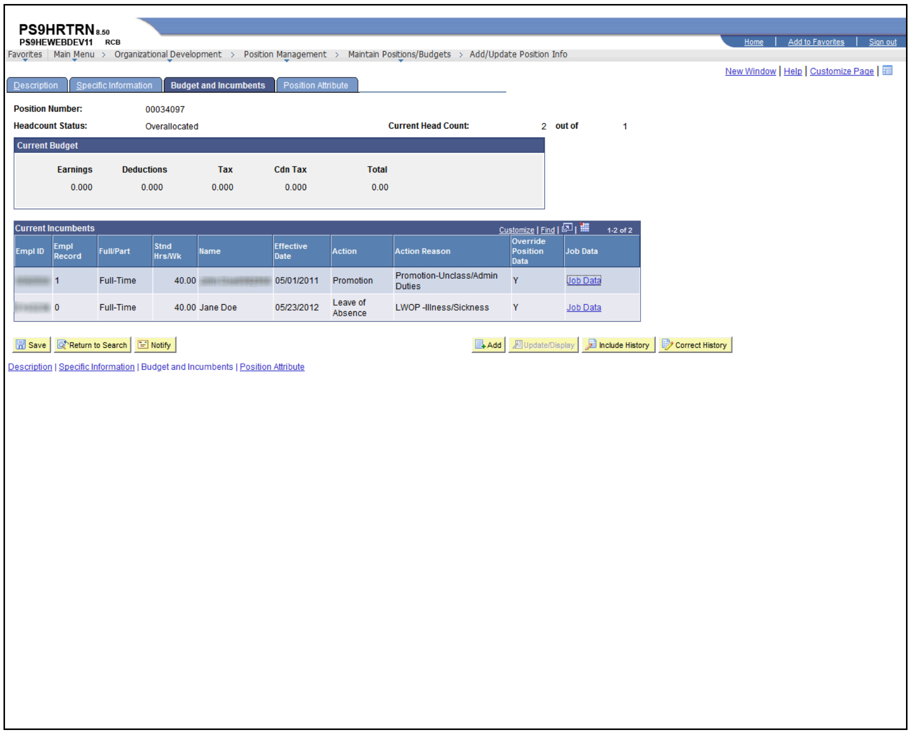
Budgeted Position - Job for which monies have been allocated.

Health Certificate - Document verifying employee is physically and mentally capable of performing job functions.

Confidential Position – N/A

Signature Authority - Person given approval responsibility.

Job Sharing Permitted – Indicates if position can be shared.



PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
New Window | Help | Customize Page
Description
Specific Information
Budget and Incumbents
Position Attribute

Position Number: 00034097
Headcount Status: Overallocated
Current Head Count: 2 out of 1

Current Budget

Earnings	Deductions	Tax	Cdn Tax	Total
0.000	0.000	0.000	0.000	0.00

Current Incumbents (Customize | Find | 1-2 of 2)

Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
[redacted]	1	Full-Time	40.00	[redacted]	05/01/2011	Promotion	Promotion-Unclass/Admin Duties	Y	Job Data
[redacted]	0	Full-Time	40.00	Jane Doe	05/23/2012	Leave of Absence	LWOP -Illness/Sickness	Y	Job Data

Save
Return to Search
Notify
Add
Update/Display
Include History
Correct History
Description | Specific Information | Budget and Incumbents | Position Attribute

Step	Action
12.	Click the **Job Data** link to view the job information panel discussed in the Workforce Administration Section. Job Data

Budget and Incumbents Tab:

Earnings - The monetary compensation paid to an employee.

Deductions - Monies subtracted from the employee's earnings for health insurance, life insurance, savings bonds, etc.

Tax - Levy on employee's net income.

Cdn Tax -

Total -

EmplID - Lists the employee who is currently in the position. If this information is blank, then there is currently not an active employee in the position.

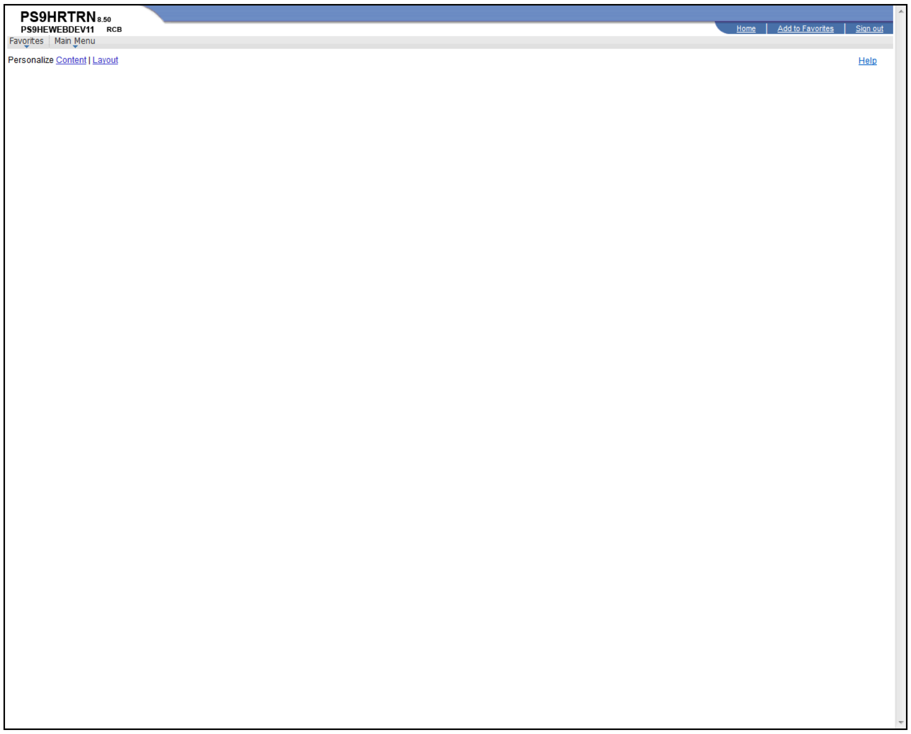
Step	Action
13.	This completes ***Manage Positions***. **End of Procedure.**

Enterprise Learning

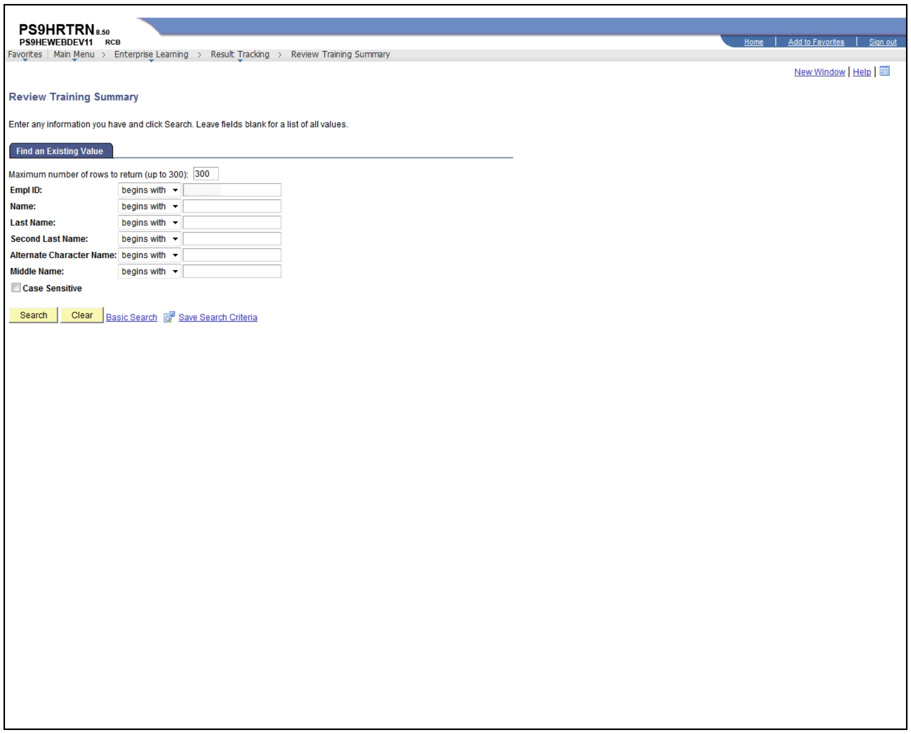
Review Training Summary

Procedure

In this topic you will learn how to **Review Training Summary**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Enterprise Learning** menu. Enterprise Learning
3.	Click the **Results Tracking** button. Result Tracking
4.	Click the **Review Training Summary** menu. Review Training Summary


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Enterprise Learning > Result Tracking > Review Training Summary
New Window | Help |
Find an Existing Value
Case Sensitive
Search
Clear
Basic Search
Save Search Criteria

Review Training Summary

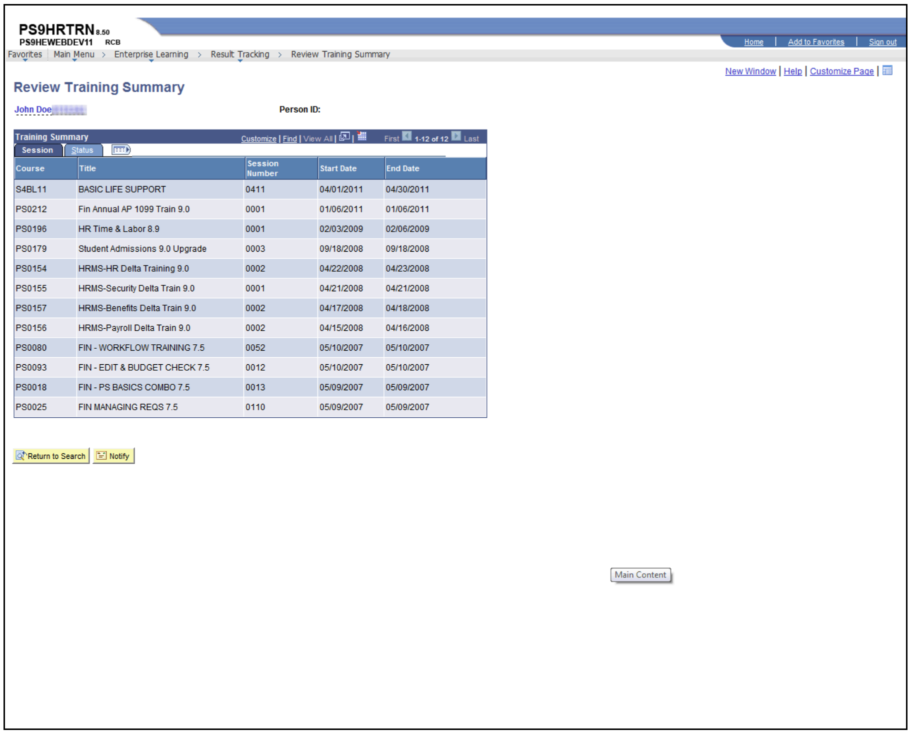
Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300

Empl ID:	begins with	
Name:	begins with	
Last Name:	begins with	
Second Last Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☐ Case Sensitive

Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**7 - digit Employee ID Number**".
6.	Click the **Search** button. Search



PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Enterprise Learning > Result Tracking > Review Training Summary
New Window | Help | Customize Page

Review Training Summary

John Doe [redacted]

Person ID:

Training Summary

Customize | Find | View All | First 1-12 of 12 Last
Session
Status

Course	Title	Session Number	Start Date	End Date
S4BL11	BASIC LIFE SUPPORT	0411	04/01/2011	04/30/2011
PS0212	Fin Annual AP 1099 Train 9.0	0001	01/06/2011	01/06/2011
PS0196	HR Time & Labor 8.9	0001	02/03/2009	02/06/2009
PS0179	Student Admissions 9.0 Upgrade	0003	09/18/2008	09/18/2008
PS0154	HRMS-HR Delta Training 9.0	0002	04/22/2008	04/23/2008
PS0155	HRMS-Security Delta Train 9.0	0001	04/21/2008	04/21/2008
PS0157	HRMS-Benefits Delta Train 9.0	0002	04/17/2008	04/18/2008
PS0156	HRMS-Payroll Delta Train 9.0	0002	04/15/2008	04/16/2008
PS0080	FIN - WORKFLOW TRAINING 7.5	0052	05/10/2007	05/10/2007
PS0093	FIN - EDIT & BUDGET CHECK 7.5	0012	05/10/2007	05/10/2007
PS0018	FIN - PS BASICS COMBO 7.5	0013	05/09/2007	05/09/2007
PS0025	FIN MANAGING REQS 7.5	0110	05/09/2007	05/09/2007

Return to Search
Notify
Main Content

Step	Action
7.	The Session page shows the class dates. Click the **Status** link. Status
8.	This completes ***Review Training Summary***. **End of Procedure.**

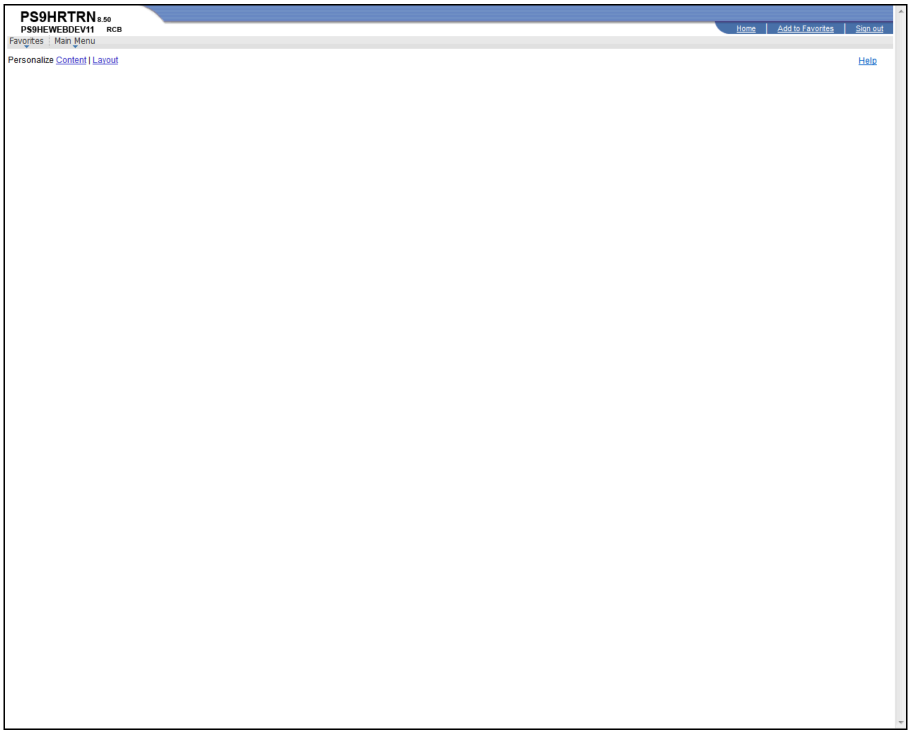
Budget Information

View Department Budget Table - LSUSH

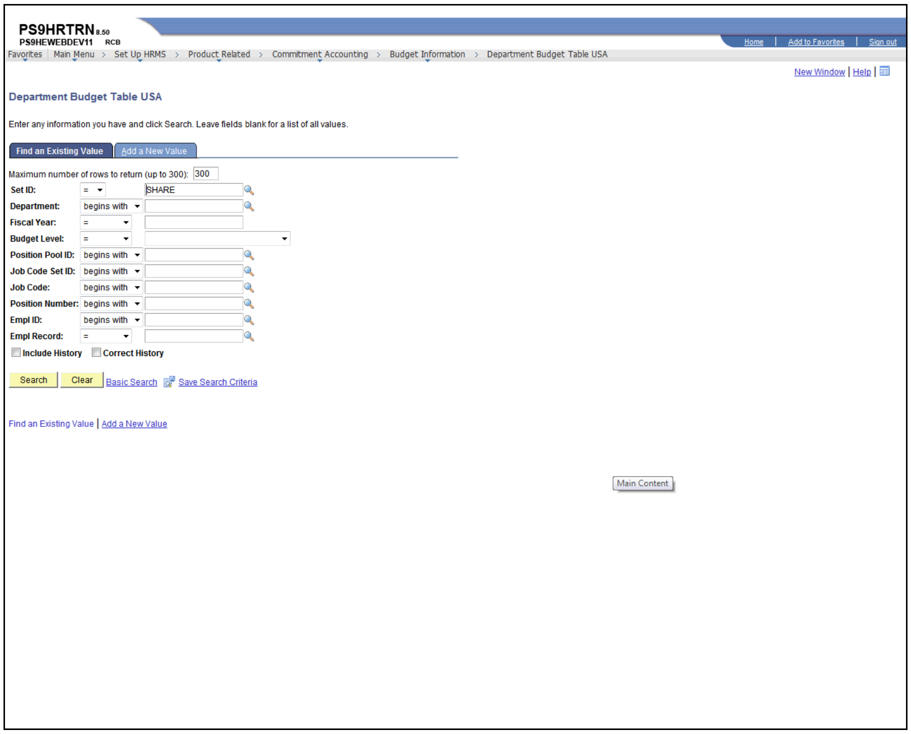
The budget encumbrance functionality in PeopleSoft assists in keeping track of funding sources for earnings. The funding source for budget is at the position level.

Procedure

In this topic you will learn how to **View Department Budget Table - LSUNO**.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Favorites
Main Menu
Home
Add to Favorites
Sign out
Personalize Content | Layout
Help

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Set Up HRMS** menu. Set Up HRMS
3.	Click the **Product Related** menu. Product Related
4.	Click the **Commitment Accounting** menu. Commitment Accounting
5.	Click the **Budget Information** menu. Budget Information
6.	Click the **Department Budget Table USA** menu. Department Budget Table USA


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA
New Window | Help
Find an Existing Value
Add a New Value
Search
Clear
Basic Search
Save Search Criteria
Find an Existing Value | Add a New Value
Main Content

Department Budget Table USA

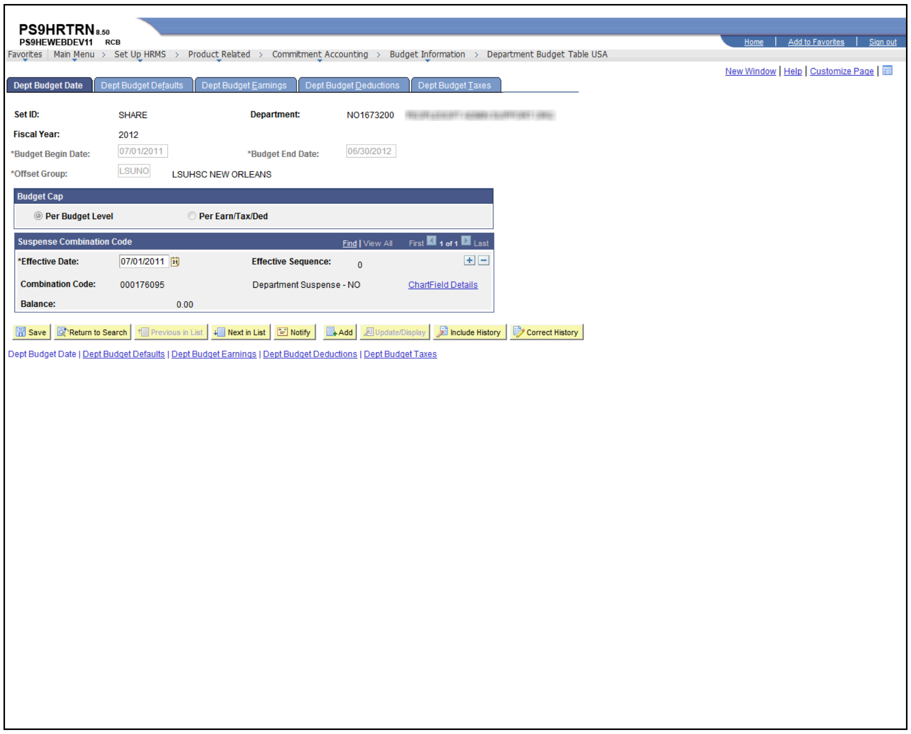
Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300): 300

Set ID:	=	SHARE
Department:	begins with	
Fiscal Year:	=	
Budget Level:	=	
Position Pool ID:	begins with	
Job Code Set ID:	begins with	
Job Code:	begins with	
Position Number:	begins with	
Empl ID:	begins with	
Empl Record:	=	

☐ Include History ☐ Correct History

Step	Action
7.	Enter the desired information into the **Position Number** field. Enter "**8-digit Position Number**".
8.	Click the **Search** button. Search
9.	Click on the desired entry from the **Search Results** table.
10.	The Dept Budget Date is a suspense Account and does not contain information that is useful to the user.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA
New Window | Help | Customize Page
Dept Budget Date
Dept Budget Defaults
Dept Budget Earnings
Dept Budget Deductions
Dept Budget Taxes
Find | View All
First 1 of 1 Last
ChartField Details
Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display
Include History
Correct History
Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Set ID: SHARE
Department: NO1673200 [redacted]
Fiscal Year: 2012
*Budget Begin Date: 07/01/2011
*Budget End Date: 06/30/2012
*Offset Group: LSUNO LSUHSC NEW ORLEANS

Budget Cap
● Per Budget Level ○ Per Earn/Tax/Ded

Suspense Combination Code
*Effective Date: 07/01/2011
Effective Sequence: 0
Combination Code: 000176095 Department Suspense - NO
Balance: 0.00

Step	Action
11.	Click the **Dept Budget Earnings** tab. Dept Budget Earnings
12.	View the Dept Budget Earnings tab.

Dept Budget Earnings Fields:

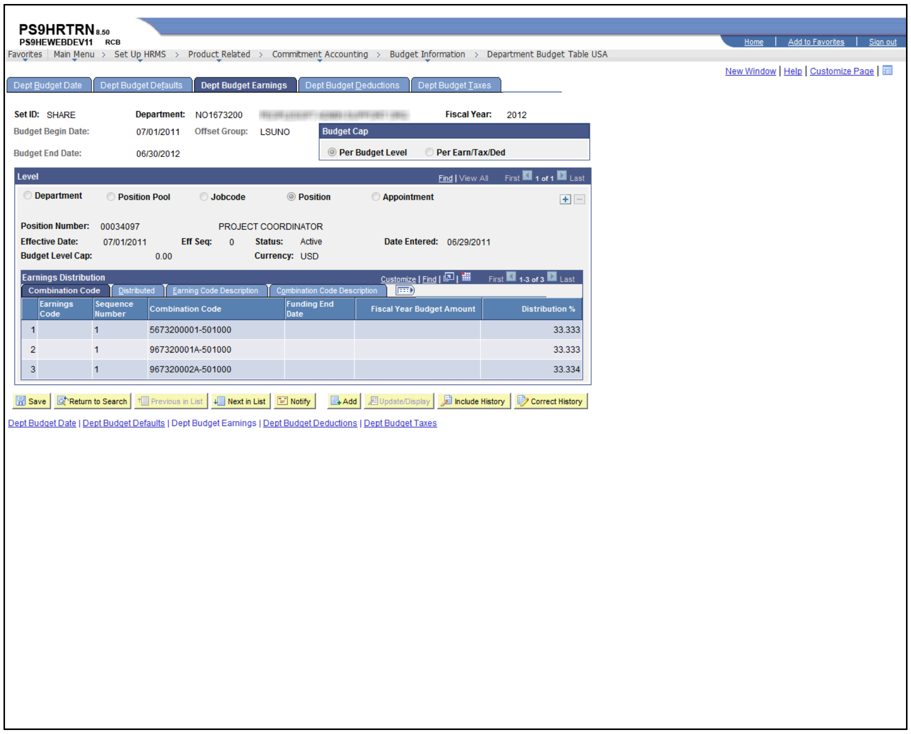
Effective Date - The date the action begins.

Status - Indicates the Account Code is currently an active or inactive funding source for the position.

Combination Code - Formerly the **Account Code**. A valid combination of General Ledger ChartFields. The ChartFields combinations are established in the General Ledger to accurately identify specific funding sources for financial transactions. **Combination Codes** are used to identify funding sources for the budget.

Distribution % - The percent of funding allocated to the specified account for the assigned position which the employee holds. The specified accounts may be viewed by clicking on the **Earnings Distribution "Scroll Area"**. These accounts will be debited each time payroll runs. The Distribution % of all accounts totals 100%. The end-user may click on the **Level "Scroll Area"** to view the dates that the accounts that were debited.

NOTE: All of the remaining tabs contained in this component function in the same way.


PS9HRTRN 8.50
PS9HEWEBDEV11 RCB
Home | Add to Favorites | Sign out
Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA
New Window | Help | Customize Page
Dept Budget Date
Dept Budget Defaults
Dept Budget Earnings
Dept Budget Deductions
Dept Budget Taxes
Find | View All First 1 of 1 Last
Customize | Find | First 1-3 of 3 Last
Combination Code
Distributed
Earning Code Description
Combination Code Description
Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display
Include History
Correct History
Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Set ID: SHARE
Department: NO1673200 [redacted]
Fiscal Year: 2012
Budget Begin Date: 07/01/2011
Offset Group: LSUNO
Budget End Date: 06/30/2012

Budget Cap
● Per Budget Level ○ Per Earn/Tax/Ded

Level
○ Department ○ Position Pool ○ Jobcode ● Position ○ Appointment

Position Number: 00034097 PROJECT COORDINATOR
Effective Date: 07/01/2011
Eff Seq: 0
Status: Active
Date Entered: 06/29/2011
Budget Level Cap: 0.00
Currency: USD

Earnings Distribution

	Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
1		1	5673200001-501000			33.333
2		1	967320001A-501000			33.333
3		1	967320002A-501000			33.334

Step	Action
13.	Click the **Dept Budget Deductions** tab. Dept Budget Deductions
14.	This completes ***View Department Budget Tables - LSUNO***. **End of Procedure.**