

PeopleSoft Training

Develop Workforce HCM 9.1 LSUNO

Version Date: February 2015



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Develop Workforce HCM 9.1 LSUNO

Manage Positions

Create a Position

Procedure

In this topic you will learn how to **Create a Position**.

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Step	Action
1.	Click the Main Menu link Main Menu
2.	Click the Organizational Development menu.
	Organizational Development
3.	Click the Position Management menu.
	Position Management
4.	Click the Maintain Positions/Budgets menu.
	Maintain Positions/Budgets
5.	Click the Add/Update Position Info menu.
	Add/Update Position Info



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avorites Main Menu >	Organizational Development > Position Ma	nagement > Maintain Positions/E	udgets > Add/Update Position Info	
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Add/Update Position	Info			
Enter any information you h	ave and click Search. Leave fields blank for a	list of all values.		
Find an Existing Value	Add a New Value			
Maximum number of rows t	o return (up to 300): 300			
Position Number:	begins with 👻			
Description:	begins with 👻]		
Position Status:	= •	•		
Business Unit:	begins with 👻	٩		
Department:	begins with 👻	٩		
Job Code:	begins with 👻	٩		
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Step	Action
6.	Click the Add a New Value tab.
7.	Click the Add button.



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Position Information		F	ind View All First 🚺 1 of 1 🗈	Last	
Position Number: 00000000				+ -	
Headcount Status:	Current Head Count	: 0 out of	0		
*Effective Date: 05/16/2012	*Status:	Active -	Initialize		
Reason: NEW New Position	Action Date:	05/16/2012			
*Position Status: Approved Status D	ate: 05/16/2012 🕅	Key Position			
Job Information					
*Business Unit: HCSDA HCSD Administration					1
*Job Code:					
*Reg/Temp: 👻	*Full/Part Time:	Full-Time 🔻			
*Regular Shift: N/A 👻	Union Code:				
*Title:	Short Title:		Detailed Position Description		
Work Location					
*Reg Region: USA Q United States					
*Department:	*Company:				
*Location:					
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Step	Action
8.	Click the Look up Business Unit button.
9.	Click the LSUNO link.
10.	Enter the desired information into the Job Code field. Enter "404".
11.	NOTE: Check the Reg/Temp field to make sure the correct option is selected for the position. If the correct option does not default, click the drop-down button the right of the field and select the appropriate option.
12.	NOTE: Check the Full/Part Time field to make sure the correct option is selected for the position. If the correct option does not default, click the drop-down button the right of the field and select the appropriate option.
13.	Click the Look up Department button.
14.	Click the button to the right of the Department field.
15.	Click the contains list item.
16.	Enter the desired information into the Department field. Enter "NO1673".
17.	Click the Look Up button.



Step	Action
18.	Click the Information Technology-Adminis link. Information Technology-Adminis
19.	Click the Look up Location button.
20.	Click the COMPUTER SERVICES link.
21.	NOTE: Check the FLSA Status field to make sure the correct option is selectedfor the position.Click the button to the right of the FLSA Status field.
	▼

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Favorites Main Me	nu > Organizational Development :	Position Management > Maintain Positions/Budgets > Add/Update Position Info	
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*Reg/Temp:	Regular -	*Full/Part Time -	
*Regular Shift:	N/A 👻	Union Code:	
*Title:	IT ANALYST 2	Short Title: INFORMATIO Detailed Position Description	
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*Reg Region:	USA Q United States		
*Department:	NO1673000 C Information Techn Adminis		
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Step	Action
22.	Click the Nonexempt list item. Nonexempt
23.	Click the Specific Information tab.
24.	NOTE: The Classified Indicator field defaults as "Classified". This option will need to be changed if the position is Unclassified.



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Headcount Status:	Current Head Count: 0 out of 0	
Specific Information	<u>Find</u> View All First 🚺 1 of 1 D Last	
Effective Date: 05/16/2012	Status: Active	
Max Head Count: 1 Mail Drop ID: Work Phone: Health Certificate: Signature Authority:	Incumbents Update incumbents Include Salary PlanGrade Updated Position Confidential Position Job Sharing Permitted Available for Telework	
✓ Education and Government		
Position Pool ID: *Pre-Encumbrance Indicator: Immediate *Encumber Salary Option: Salary Step		
*Classified Indicator: Classified	▼ FTE: 0.000000 Adds to FTE Actual Count	
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Step	Action
25.	Enter the desired information into the FTE field. Enter "1".
26.	Click the Adds to FTE Actual Count option.
27.	Click the Position Attribute tab. Position Attribute



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Job Code: 404 IT ANALYST 2 SAP Position No:	
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Description Specific Information Budget and Incumbents Position Attribute	
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Step	Action
28.	Click the Training Series Indicator option.
	Training Series Indicator
29.	Click the Save button.
30.	NOTE: A new Position Number is assigned and changes from 00000000 to 00049728 after a successful save.
31.	This completes <i>Create a Position</i> . End of Procedure.



Update Position Data

Procedure

In this topic you will learn how to **Update Position Data**.

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





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	Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info	<u>Add to Favorites</u> <u>Sigir ou</u>
* · · ·		New Window Help 📰
Add/Update Position	Info	
Enter any information your	have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	Add a New Value	
Maximum number of rows	to return (up to 300): 300	
Position Number:	begins with 👻 00049723	
Description:	begins with 👻	
Position Status:	= v	
Business Unit:	begins with 👻	
Department:	begins with 🔻 🧠	
Job Code:	begins with 👻 🔍	
Reports To Position Num		
Include History	orrect History Case Sensitive	
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Find an Existing Value Ac	Id a New Value	
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Step	Action
6.	Enter the Position Number to update and click the Search button.



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Description S	pecific Information	<u>B</u> udget and Incumbents	Position Attribute						
Position Informati	ion			<u>Fi</u>	ind View All 🔋 First 💶 1 of	1 🗈 Last			
Position Number	00049723					+ -			
Headcount Statu	s: Open		Current Head Count:	0 out of	1				
*Effective Date:	04/12/2012 関		*Status:	Active -					
Reason:	NEW New Pos	ition	Action Date:	04/12/2012					
*Position Status:	Approved -	Status Date: 04/12/2	012	Key Position					
Job Information									
*Business Unit:		IC New Orleans							-
*Job Code:	404 🔍 IT AI	NALYST 2							
*Reg/Temp:	Regular -		*Full/Part Time:	Full-Time -					
*Regular Shift:	N/A 👻		Union Code:						
*Title:	IT ANALYST 2		Short Title:	INFORMATIO	Detailed Position Descrip	tion			
Wor Main Conte	nt								
*Reg Region:	USA 🔍 Unite	ed States							
*Department:	NO1673000 🔍	Information Technology- Adminis	Company:	001 LSUH	SC-New Orleans				L
*Location:	434150000 🔍	COMPUTER SERVICES							
Reports To:	<u> </u>		Dot-Line:	<u> </u>					
Supervisor Lvl:	<u> </u>		Security Clearance:	<u> </u>					
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Step	Action
7.	Click the Add a new row at row 1 button.
8.	Click the Look up Reason button.
9.	Click the REA link.
10.	NOTE: Check the Reg/Temp field to make sure the correct option is selected for the position. If the correct option does not default, click the drop-down button the right of the field and select the appropriate option.
11.	NOTE: Check the Full/Part Time field to make sure the correct option is selected for the position. If the correct option does not default, click the drop-down button the right of the field and select the appropriate option.
12.	Click the Look up Department button.
13.	Enter the desired information into the Department field. Enter "NO1673".
14.	Click the Look Up button.
15.	Click the Information Technology-Adminis link. Information Technology-Adminis



Step	Action
16.	NOTE: Check the Location field to make sure no change is required. If the correct option does not default, click the drop-down button the right of the field and select the appropriate option.
17.	NOTE: Check the FLSA Status field to make sure no change is required. If the correct option does not default, click the drop-down button the right of the field and select the appropriate option.
18.	Click the Save button.
19.	This completes <i>Update Position Data</i> . End of Procedure.



Employment Actions

Add a Person - Classified

Procedure

In this topic you will learn how to Add a Person - Classified.

NOTE: Before you add a person, search for the person first to see if the person exists in the system. If the person is not in the system proceed to add a person.

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Step	Action		
1.	<i>NOTE:</i> Before adding a person to the system, you <u>must first check to make sure</u> the person does not already exist in the system.		
	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		



Step	Action
5.	Enter the desired information into the Doe field. Enter "Last Name".
6.	Click the Search button.
7.	 NOTE: If there is a data match on the search criteria, check the Date of Birth and National ID fields to make sure you are not inputting a duplicate person into the system. If this person does not exist in the system, proceed to the next step to create a new person.
	If the person <u>already exists</u> in the system, continue to use the Modify action to update the employee's data. You can reference the <u>Record an Employee Data</u> <u>Change</u> topic for instructions on modifying a person's data.
8.	If the person does not already exist in the system navigate to:
	Main Menu > Workforce Administration > Personal Information > Add a Person Add a Person





Step	Action
9.	Click the Add Person button. Add Person
10.	The Effective Date defaults to the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date.
	NOTE: The Effective Date is be the employee's hire date.



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	tinformation Regional Organ	ormation > Add a Person	New Window Help Customize Page 🗐 🔺
		Person ID: NEW	
Name		Eind View All 🛛 First 🚺 1 of 1 🕨 Last	
*Effective Date: *Format Type:	05/24/2012	+ -	
Display Name:		Add Name	
Biographic Information			
Date of Birth: Birth Country:	USA Q United Sta	• · · · · · · · · · · · · · · · · · · ·	
Birth State: Birth Location:		Waive Data Protection	E
Biographical History		Find View All First 🚺 1 of 1 🖸 Last	
*Effective Date: *Gender: *Highest Education Level: *Marital Status:		 ★ ■ As of: 	
Language Code: Alternate ID:	Full-Time Student	AS UI.	
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Step	Action
11.	Click the Add Name button.



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Edit Name English Name Format Prefix: First Name: Last Name: Suffix: Display Name: Formal Name: Name:		
OK Cancel Refresh Dome Dome Dome		zanet Protected Mode: Off

Step	Action
12.	Click the button to the right of the Prefix field.
13.	Click the Ms list item. Ms
14.	Enter the desired information into the First Name field. Enter "Mary Jane".
15.	Enter the desired information into the Last Name field. Enter "Doe".
16.	Click the Refresh Name button. Refresh Name
17.	Click the OK button.

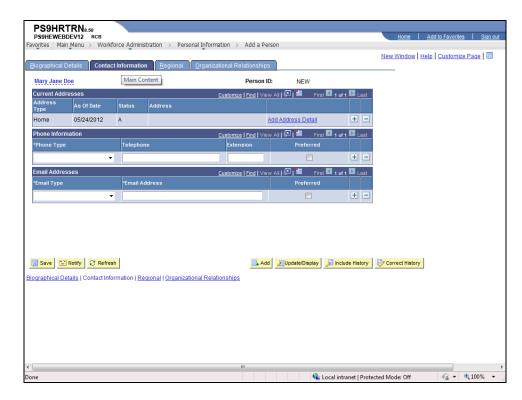


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	t Information		nal Relationships	_	New Window	Help Customize Page	
Mary Jane Doe			Person ID:	NEW			
Name			Find View	/ All 🛛 First 🚺 1 of 1 🚺 Last			
*Effective Date:	05/24/2012			+ -			
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Display Name:	Mary Jane Doe		Edit Name				
Biographic Information							
Date of Birth:	31	0 Years	0 Months				
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Step	Action
18.	Enter the desired information into the Date of Birth field. Enter "070180".
19.	Click the Look up Birth State button.
20.	Enter the desired information into the State field. Enter " T ".
21.	Click the Look Up button.
22.	Click the Texas link.
23.	Enter the desired information into the Birth Location field. Enter "Houston".
24.	Click the button to the right of the Gender field.
25.	Click the Female list item. Female
26.	Click the button to the right of the Highest Education Level field.
27.	Click the G-Bachelor's Level Degree list item. G-Bachelor's Level Degree
28.	Click the button to the right of the Marital Status field.



Step	Action
29.	Click the Married list item. Married
30.	Click the button to the right of the Language Code field.
31.	Click the English list item. English
32.	Enter the desired information into the National ID field. Enter "9-digit Social Security Number".
33.	NOTE: If the National ID field is left blank during hire, when a change is made to another field on the panel in Correction mode and then Saved, the text "Applied For" displays in the National ID field. However, the National ID field is still Null in the table (not populated with "Applied For").
34.	NOTE: Verify that the Primary ID box to the right of the National ID field is checked.
35.	Click the Contact Information tab.



Step	Action
36.	Click the Add Address Detail link.
	Add Address Detail



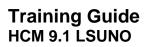
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Step	Action
37.	Click the Add Address link.
	Add Address



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Address 3:			
City:	State:		
Postal:	Main Content		
Parish:			
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Step	Action
38.	Enter the desired information into the Address 1 field. Enter "2233 Main Street".
	NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P. O. Box information, etc.
39.	Enter the desired information into the City field. Enter " New Orleans ".
40.	Enter the desired information into the State field. Enter "LA".
41.	Enter the desired information into the Postal field. Enter "70112".
42.	Click the Look up Parish button.
43.	You may enter the first character of the Parish in the Description field or click the Look Up button.
	Enter the desired information into the Description field. Enter " O ".
44.	Click the Look Up button.
45.	Click the Orleans link. Orleans
46.	Click the OK button.





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Country: USA *Status: A		2233 Main Street New Orleans, LA 70112 Orleans	+ -		
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Step	Action
47.	Click the OK button.



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Mary Jane Doe			Pers	on ID: 1	NEW					
Current Addresses	;		Customize Find	View All 🖓	First 🖾 1 of 1	Last				
Address Type As Of	Of Date Status	Address								
Home 05/24	24/2012 A	2233 Main Street New Orleans, LA 70112 Orleans		Edit/View Addre	ess Detail	+ -				
Phone Information			Customize Find	View All 💷	First 🚺 1 of 1	Last				
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Step	Action
48.	Click the button to the right of the Phone Type field.
49.	Click the Home list item. Home
50.	Enter the desired information into the Telephone field. Enter " 5042221515 ".
51.	Click the Preferred option.
52.	Click the button to the right of the Email Type field.
53.	Click the Home list item. Home
54.	Enter the desired information into the Email Address field. Enter "mjdoe@hotmail.com".
55.	Click the Preferred option.
56.	Click the Regional tab.



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Step	Action
57.	Click the Look up Ethnic Group button.
58.	Click the HISPA link.
59.	Click the Primary option.
60.	Click the button to the right of the Military Status field.
61.	Click the No Military Service list item. No Military Service
62.	Click the Organizational Relationships tab.



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Step	Action
63.	Click the Employee option.
64.	Click the Add Relationship button. NOTE: Once you click the Add the Relationship button, the system will automatically assign the employee an ID number. Add Relationship
65.	The employee's ID number displays at the top of the page.WARNING: Make sure you note the employee's ID number before continuing to the Job Data section. The employee ID number is the only means of locating the employee in the system until the Job Data and Benefits Program Participation sections are completed.
66.	The Effective Date defaults to the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. <i>The Effective Date is the employee's hire date.</i>



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Step	Action
67.	Click the button to the right of the Reason field.
68.	Click the Classified Appt list item.
69.	Enter the desired information into the Position Number field. Enter "00017616". NOTE: Once the Position Number is entered, the system will automatically populate the appropriate information into the remaining fields when you navigate away from the field.
70.	NOTE: It is important to verify that each field is accurately populated from manage position.
71.	Click the Job Information tab.
72.	Click the button to the right of the Empl Class field.
73.	Click the Probation list item. Probation



Step	Action
74.	The Work Day Hours field defaults based on the employee's FTE. <i>NOTE: It is important that you check to make sure the data that appears on the</i>
	Job Information page was populated from manage positions correctly. The Key Fields to check are:
	Regular/Temporary, Full-Part, Classified Ind, Standard Hours, and FTE.
75.	Click the Payroll tab.
76.	Click the Look up Pay Group button.
77.	Click the NBE link.
78.	The Employee Type is automatically populated into the field according to the Pay Group code selected.
	If the Employee Type is incorrect, click the look-up icon and select an Employee Type from the drop-down list.



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Step	Action
79.	Click the Look up Tax Location Code button.
80.	Click the LA link.



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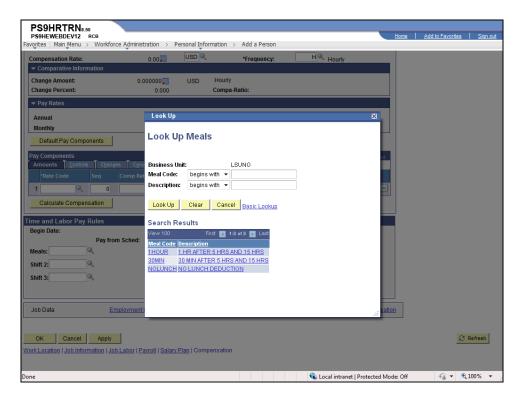
Step	Action
81.	Click the Look up Holiday Schedule button.
82.	Click the NOC link.
83.	Click the button to the right of the FICA Status field.
84.	Click the Medicare Only list item. Medicare only
85.	Click the Compensation tab and then scroll to the bottom of the page.



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Step	Action
86.	Click the Look up Meals button.





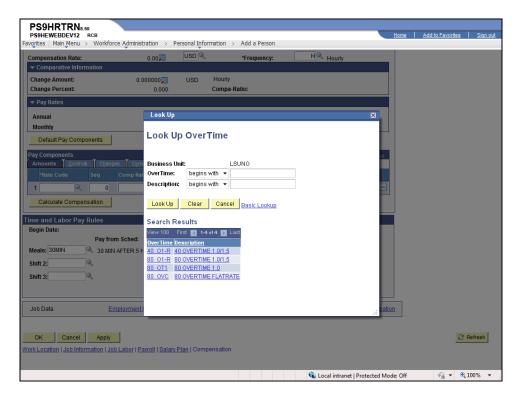
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87.	Click the 30MIN link.
	30MIN



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Step	Action
88.	Click the Look up OverTime button.





Step	Action
89.	Click the 40_O1-R link.
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1	Step	Action
	90.	Click the Look up CallBack button.





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OK Cancel Apply			🕄 Refresh
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Step	Action
91.	Click the CBP-V link.
92.	Click the Look up Holiday Wrkd button.
93.	Click the HPW-HOL link.
94.	Click the Look up Rate Code button.
95.	Enter the desired information into the Comp Rate Code field. Enter " N ".
96.	Click the Look Up button.
97.	Click the NAHRLY link.
98.	Enter the desired information into the Comp Rate field. Enter " 18.00 ".
99.	Click the Calculate Compensation button. Calculate Compensation
100.	Click the Benefits Program Participation link. Benefits Program Participation

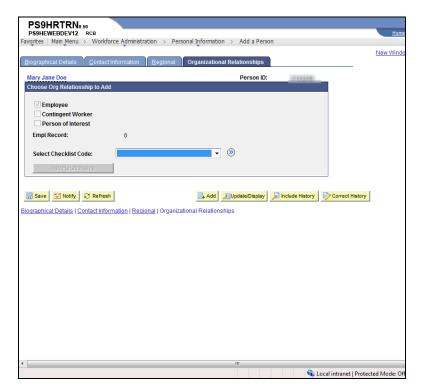


Step	Action
101.	 NOTE: The Effective Date defaults to the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. The Effective Date is the employee's hire date. In this example the hire date and effective date are the same so the date does not need to be adjusted.
102.	Click the Look up Benefit Program button.
103.	Click the FTP link.

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Step	Action
104.	Click the Save button.





Step	Action
105.	Click the Save button.
106.	This completes <i>Add a Person - Classified</i> . End of Procedure.





Add a Person - Unclassified

Procedure

In this topic you will learn how to Add a Person - Unclassified.

NOTE: Before you add a person, search for the person first to see if the person exists in the system. If the person is not in the system proceed to add a person.

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Step	Action
1.	Click the Main Menu button.
2.	Click the Workforce Administration link. Workforce Administration
3.	Click the Personal Information menu. Personal Information
4.	NOTE: You must first search to see if the person exists in the system. Click the Modify a Person menu. Modify a Person



	В	Home Add to Favorites Sign
vorites Main Menu >	Workforce Administration > Personal Information > Modify a Person	
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iter any information you ha	ave and click Search. Leave fields blank for a list of all values.	
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Step	Action
5.	Enter the desired information into the Last Name field. Enter "Doe".
6.	Click the Search button.
7.	NOTE: If there is a data match on the search criteria, check the Date of Birth and National ID fields to make sure you are not inputting a duplicate person into the system.
	If this person <u>does not exist</u> in the system, proceed to the next step to create a new person.
	If the person <u>already exists</u> in the system, continue to use the Modify action to update the employee's data. You can reference the <u>Record an Employee Data</u> <u>Change</u> topic for instructions on modifying a person's data.



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Step	Action
8.	If the person does not already exist in the system navigate to:
	Main Menu > Workforce Administration > Personal Information > Add a
	Add a Person



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NEW Add Person		
Search for Matching Persons		
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Step	Action
9.	Click the Add the Person link. Add Person
10.	NOTE: The Effective Date defaults as the current date. Depending on when you are entering the employee's information, you may need to change the Effective Date.



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Step	Action
11.	In this example the employee's hire date is 05/14/2012, so the Effective Date must be changed.
12.	Click the desired date.
13.	Click the Add Name link. Add Name



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Refresh Name	
OK Cancel Refresh	

Step	Action
14.	Click the button to the right of the Prefix field.
15.	Click the Mr list item.
16.	Enter the desired information into the First Name field. Enter "John".
17.	Enter the desired information into the Last Name field. Enter "Smith".
18.	Click the Refresh Name button. Refresh Name
19.	Click the OK button.



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Step	Action
20.	Enter the desired information into the Date of Birth field. Enter "010173".
21.	Enter the desired information into the Birth State field. Enter "LA".
22.	Enter the desired information into the Birth Location field. Enter " Baton Rouge ".
23.	Click the button to the right of the Gender field.
24.	Click the Male list item. Male
25.	Click the button to the right of the Highest Education Level field.
26.	Click the I-Master's Level Degree list item. I-Master's Level Degree
27.	Click the button to the right of the Marital Status field.
28.	Click the Single list item. Single
29.	Click the button to the right of the Language Code field.
30.	Click the English list item. English



Step	Action
31.	Enter the desired information into the National ID field. Enter "9-digit Social Security Number".
32.	NOTE: If the National ID field is left blank during hire, when a change is made to another field on the panel in Correction mode and then Saved, the text "Applied For" displays in the National ID field. However, the National ID field is still Null in the table (not populated with "Applied For").
33.	NOTE: Verify that the Primary ID box to the right of the National ID field is checked.
34.	Click the Contact Information tab.

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Step	Action
35.	Click the Add Address Detail link.
	Add Address Detail



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Step	Action
36.	Click the Add Address link. Add Address



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OK	Cancel		

Step	Action
37.	Enter the desired information into the Address 1 field. Enter "4545 Canal Blvd.".
	NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P.O. Box numbers, etc.
38.	Enter the desired information into the City field. Enter "New Orleans".
39.	Enter the desired information into the State field. Enter " LA ".
40.	Enter the desired information into the Postal field. Enter "70112".
41.	Enter the desired information into the Parish field. Enter "Orleans".
42.	Click the OK button.



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Step	Action
43.	Click the OK button.



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Step	Action
44.	Click the Add a new row at row 1 button.
45.	Click the button to the right of the Address Type field.
46.	Click the Mailing list item. Mailing
47.	Click the Add Address Detail link. Add Address Detail



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Step	Action
48.	In this example the Effective Date is the employee's hire date.
	Click the Choose a date button.
49.	Click the desired date.
50.	Click the Add Address link. Add Address



	TRN 8.50 DEV11 RCB Menu > Workforce Administration > Personal Information >	Add a Porson	Home Add	to Favorites Sign out
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Parish:	Q			
OK	Cancel			
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Step	Action
51.	Enter the desired information into the Address 1 field. Enter "P.O. Box 10054".
52.	Enter the desired information into the City field. Enter " New Orleans ".
53.	Enter the desired information into the State field. Enter "LA".
54.	Enter the desired information into the Postal field. Enter "70112".
55.	Enter the desired information into the Parish field. Enter "Orleans".
56.	Click the OK button.



PS9HEVEBDEV11 RCB Favorites Main Menu > Workforce Administration > Address History	Personal Information > Add a Person	Home Add to Favorites	<u>Sign out</u> Page 📰
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Address History	<u>Find</u> First 🚺 1 of 1 🚺 Last		
	P.O. Box 10054 + - New Orleans, LA 70112 Orleans		
OK Cancel Refresh			
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Step	Action
57.	Click the OK button.



John Smith			on <u>R</u> egional <u>O</u> rganizational Relati Po	erson ID:	NEW		
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Step	Action
58.	Click the Phone Type list.
59.	Click the Home list item. Home
60.	Enter the desired information into the Telephone field. Enter "50456899999".
61.	Click the Add a new row at row 1 button.
62.	Click the button to the right of the Phone Type field.
63.	Click the Mobile list item. Mobile
64.	Enter the desired information into the Telephone field. Enter "5042367878".
65.	Click the Preferred option.
66.	Click the button to the right of the Email Type field.
67.	Click the LSUHSC Email Address list item. LSUHSC Email Address



Step	Action
68.	Enter the desired information into the Email Address field. Enter "jsmith@lsuhsc.edu".
69.	Click the Preferred option.
70.	Click the Regional tab.

PS9HRTRN 8.50 PS9HEWEBDEV11 RCB			Home Add to Favorites Sign out
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Step	Action
71.	Click the Look up Ethnic Group button.
72.	Click the BLACK link.
73.	Click the Primary option.
74.	Click the button to the right of the Military Status field.
75.	Click the No Military Service list item. No Military Service



Step	Action
76.	Click the Organizational Relationships tab.
	Organizational Relationships

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Step	Action
77.	Click the Employee option.
78.	Click the Add Relationship button. Add Relationship



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Step	Action
79.	Click the button to the right of the Reason field.
80.	Click the ApClickment Unclassified list item. Appointment Unclassified
81.	Enter the desired information into the Position Number field. Enter "00031354".
82.	<i>NOTE: It is important to verify that each field is accurately populated from manage position.</i>
83.	Click the Job Information tab.
84.	Click the button to the right of the Empl Class field.
85.	Click the Indf No tn list item. Indf No Tn
86.	The Standard Hours information displays based on the employee's FTE. <i>NOTE: It is important that you check to make sure the data that appears on the</i> <i>Job Information page was populated from manage position correctly.</i> <i>The Key Fields to check are:</i> Reculter/Tempergery, Ec/l/Part, Classified and Standard Hours, and ETE
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Step	Action			
87.	Click the Payroll tab.			
88.	Click the Look up Pay Group button.			
89.	Click the Down button of the scrollbar.			
90.	Click the Full-time FacultyStaff (New Or link.			
91.	The Employee Type is automatically populated into the field according to the Pay Group code selected.			
	If the Employee Type is incorrect, click the look-up icon and select an Employee Type from the drop-down list.			
92.	Enter the desired information into the Tax Location Code field. Enter " LA ".			
93.	Click the Look up Holiday Schedule button.			
94.	Click the NHS link.			
95.	Check to make sure the FICA Status is correct. If changes are required, click the drop-down arrow and select an option from the list.			



Step	Action			
96.	Click the Compensation tab.			
	Compensation			
97.	Click the Look up Rate Code button.			
98.	Enter the desired information into the Comp Rate Code field. Enter " N ".			
99.	Click the Look Up button.			
100.	Click the NAMNTH link.			
101.	Enter the desired information into the Comp Rate field. Enter "4000.00".			
102.	Click the Calculate Compensation button. Calculate Compensation			
103.	Annual and Monthly compensation rates display in the Comparative Information and Pay Rates sections.			
	Click the Benefits Program Participation link. Benefits Program Participation			
104.	NOTE: The Effective Date defaults as the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. The Effective Date is the employee's hire date.			
105.	In this example the effective Date has defaulted to the current date. This must be changed to reflect the employee's hire date.			
	Click the Choose a date button.			
106.	Click the desired date.			
107.	Click the Look up Benefit Program button.			
108.	Click the FTP link.			
109.	Click the OK button.			
110.	Click the OK button.			
111.	This completes <i>Add a Person - Unclassified</i> . End of Procedure.			





Record a Department Change

Procedure

In this topic you will learn how to **Record a Department Change**.

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



Step	Action
6.	A Department Change must be recorded in two places within the system:
	 The Description tab in Add/Update Position Info and The Work Location tab in Job Data.
	NOTE: Changes must first be added to the Description tab in Add/Update Position Info.
7.	In this exercise the employee will change departments from NO1651200 to NO1651300.

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		New Window Help
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Enter any information you	have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	Add a New Value	
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Position Number:	begins with 👻 00017787	
Description:	begins with 👻	
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Job Code:	begins with 👻	
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Step	Action
8.	NOTE: The current Position Number must be known before changing the department. The Position Number can be found on the Work Location tab in Job Data.
	Enter the Position Number and click the Search button.



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	Position Number	: 00017787					+ -		
	Headcount Statu			Current Head Count	: 1 out of	1			
*	Effective Date:	09/09/2003 関		*Status:	Active -				
	Reason:	NPP 🤍 Move to r	New Pay Plan	Action Date:	09/08/2003				
*	Position Status:	Approved -	Status Date: 12/02	2/2000	Key Position				
	Job Information								-
,	Business Unit:		IC New Orleans						-
	Job Code:	140470 🔍 ACC	COUNTING SPECIALIST 2						
,	'Reg/Temp:	Regular -		*Full/Part Time:	Full-Time 🔻				
,	Regular Shift:	N/A 👻		Union Code:	Q				
	'Title:	ACCOUNTING SP	ECIALIST 2	Short Title:	ACCOUNTING	Detailed Position Description	<u>m</u>		
	Work Location								
	'Reg Region:	USA 🔍 Unite	ed States						
	Department:	NO1651200	A/S-Cashier's Office-LRC	Company:	001 LSUH	SC-New Orleans			
,	Location:	484400004	ACCOUNTING SERVICES	S/CASHIER'S					
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Step	Action
9.	Click the Add a new row at row 1 button.
10.	The Effective Date defaults to the current date. The effective Date is the date the department change will occur.
	Click the Choose a date button.
11.	Click the desired date.
12.	Click the Look up Reason button.
13.	Click the Transfer link. Transfer
14.	Enter the desired information into the Department field. Enter "NO1651".
15.	Click the A/S-Cashier's Office-LRC link. A/S-Cashier's Office-LRC
16.	<i>NOTE:</i> When updating Position Data, review each field to make sure the data is correct.
17.	Click the Save button.



Step	Action
18.	Click the OK button.
19.	Click the Home link.

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Step	Action
20.	Click the Main Menu button. Main Menu
21.	Click the Workforce Administration menu. Workforce Administration
22.	Click the Job Information menu. Job Information
23.	Click the Job Data menu. Job Data



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Step	Action
24.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
25.	Click the Search button.



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*Business Unit:	LSUNO	LSUMC New Orlean:	В					
*Department:	NO1651200	A/S-Cashier's Office-	LRC					
Department Entry Date:	11/02/1998							
*Location:	484400004	ACCOUNTING SERV	/ICES/CASHIER'S					
Establishment ID:				Date Created	: 05/17/20	12		
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Expected Job End Date:	81							
Job Data	Employment Data	Earnings Dis	tribution	Benefits Pro	gram Participal	ion		
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Step	Action
26.	Click the Add a new row at row 1 button.
27.	NOTE: The Effective Date will be the date the department change will occur. The Effective Date will default to the current date. To change the date, click the calendar to the right of the field or enter the date directly into the field.
28.	Click the button to the right of the Action field.
29.	Click the Transfer list item. Transfer
30.	Click the button to the right of the Reason field.
31.	Click the Department ID Change list item. Department ID Change
32.	Enter the desired information into the Department field. Enter "1651300".



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HR Status:	Active	Reason:	Department ID Change	-	
Payroll Status:	Active	*Job Indicator:	Primary Job	-	
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Step	Action
33.	Click the Save button.
34.	<i>NOTE:</i> When updating an Employee's job data, review each field to make sure the data is correct.
35.	This completes <i>Record a Department Change</i> . End of Procedure.





Record a Leave of Absence

Procedure

In this topic you will learn how to **Record a Leave of Absence**.

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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



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Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
6.	Click the Search button.
7.	In this exercise the employee will take a Leave of Absence beginning on 05/23/2012 due to illness.



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ork Location				Find	First 🚺 1 of 2 🕨	Last		
Effective Date:	05/16/2012			_	Go To Row			
Effective Sequence:	0	*Action:	Transfer		•	Add		
HR Status:	Active	Reason:	Department ID Cha	nge				
Payroll Status:	Active	*Job Indicator:	Primary Job		•			
	00034097				Current			
Position Number:	Use Position Data	PROJECT COORDI	INATOR					
Acad Rank:								
Position Entry Date:	05/03/2012	Desert						
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Regulatory Region:		United States						
Company:	001 LSUNO	LSUHSC-New Orles						
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Department:	05/09/2012	Information Techno	logy-Adminis					
Department Entry Date:	LSUNO							
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Establishment ID:	~			Date Created	: 05/16/201	12		
Last Start Date:	05/03/2012							
Expected Job End Date:	31							
Job Data	Employment Data	Earnings Di	istribution	Benefits Pro	gram Participati	ion		

Step	Action
8.	Point to the Add a new row at row 1 button.
9.	The Effective Date is the date the leave will begin. In this example the Effective Date is 05/23/12.
	Click the Choose a date button.
10.	Click the desired date.
11.	Click the button to the right of the Action field.
12.	Click the Leave of Absence list item. Leave of Absence
13.	Click the button to the right of the Reason field.
14.	Click the LWOP -Illness/Sickness list item. LWOP -Illness/Sickness
15.	Click the Choose a date button for the Expected Return Date field.



Step	Action
16.	You can enter the date directly into the field or select it from the calendar.
	Click the desired date.
17.	Click the Save button.
18.	This completes <i>Record a Leave of Absence</i> . End of Procedure.



Return from Leave of Absence

Procedure

In this topic you will learn how to Return from Leave of Absence.

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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



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



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Effective Date:	05/17/2012			Go To Row 🛨 🖃	
Effective Sequence:	0	*Action:	Leave of Absence	•	
HR Status:	Active	Reason:	LWOP -Illness/Sickness	•	
Payroll Status:	Leave of Absence	*Job Indicator:	Primary Job	•	
				Current	
Position Number:	00019722	DEAN OF MAJOR AC	ADEMIC AREA		
Acad Rank: Prof	Use Position Data				
Position Entry Date:	11/01/2004				
	Position Managemen	t Record			
Regulatory Region:	USA	United States			
Company:	001	LSUHSC-New Orlea	ns		
Business Unit:	LSUNO	LSUMC New Orleans	3		
Department:	NO1050100	LSUNO A/H-Adminis	tration		
Department Entry Date:	05/01/2009				
Location:	405010000	ALLIED HEALTH - AD	DMINISTRATION		
Establishment ID:	Q		Date Crea	ted: 05/17/2012	
Last Start Date:	06/01/1979				
Expected Job End Date:	9				
Expected Return Date:	05/17/2012	Override Last Da	te Worked		
Last Date Worked:	05/09/2012				
lob Data	Employment Data	Earnings Dis	tribution Benefits	Program Participation	

Step	Action
7.	Click the Add a new row at row 1 button.
8.	Click the button to the right of the Action field.
9.	Click the Return from Leave list item. Return from Leave
10.	Click the button to the right of the Reason field.
11.	Click the Return from LWOP list item. Return from LWOP
12.	Click the Save button.
13.	This completes <i>Return from Leave of Absence</i> . End of Procedure.





Record an Employee Promotion

Procedure

In this topic you will learn how to **Record an Employee Promotion**.

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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



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



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Effective Sequence:	0	*Action:	Data Change		-			
HR Status:	Active	Reason:	Other Data Changes		•			
Payroll Status:	Active	*Job Indicator:	Primary Job		-			
	00018051				Current [
Position Number:	Use Position Data	ADMINISTRATIVE C	OORDINATOR 3					
Acad Rank:								
Position Entry Date:	02/25/2008	Pacard						
Regulatory Region:	USA							
		United States						
Company:	001 LSUNO	LSUHSC-New Orles						
Bu Main Content	NO1651000	LSUMC New Orlean Accounting Services						
Department Entry Date:	05/01/2007	Accounting Services	5					
Location:	484400003	ACCT SERV/ASSET	MONT					
Establishment ID:		AGGT SERVIAGGET	MOMT	Date Create	ed: 09/30/20	010		
Last Start Date:	02/11/1992							
Expected Job End Date:	31							
Job Data	Employment Data	Earnings Di	stribution	<u>Benefits P</u>	rogram Participa	ation		

Step	Action
7.	Click the Add a new row at row 1 button.
8.	Click the button to the right of the Action field.
9.	Click the Promotion list item. Promotion
10.	Click the button to the right of the Reason field.
11.	Click the Non Comp Prom Up 1 list item. Non Comp Prom Up 1
12.	Enter the desired information into the Position Number field. Enter "00018089".
13.	NOTE: Make sure to update manage position for these types of actions to capture any changes in Titles, FTE, etc. Refer to the <u>Update Manage Position</u> topic for instructions on how to update manage position.
14.	Click the Job Information tab.



Step	Action
15.	Check the Empl Class for appropriate designation. If the designation is incorrect, click the drop-down arrow to the right of the Empl Class field to select another option.
	NOTE: It is important that you check to make sure the data that appears on the Job Information page was populated from manage position correctly. The Key Fields to check are: Regular/Temporary, Full/Part, Classified Ind, Standard Hours, and FTE.

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Payroll Status:	Active	Job Indicator:	Primary Job				
Job Code:	168070	ADMINISTRATIVE	COORDINATOR 4		Current		
Entry Date:	05/17/2012						
Supervisor Level:							
Supervisor ID:							
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Empl Class:	Permanent -	*Officer Code:	None 👻				
Regular Shift:	N/A	Shift Rate:					
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Step	Action
16.	Click the Payroll tab.
17.	In this example the Pay Group and Holiday Schedule do not change. However, you will need to verify, and edit if needed, the Pay Group and Holiday Schedule for the new position.



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Step	Action
18.	Click the Compensation tab.



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Change Percent:	0.00	,	-Ratio: 0.78				
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Annual	22,069.83168	30 USD Daily		84.883968	USD		
Monthly	1,839.15264			14.147328	USD		
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Step	Action
19.	Enter the desired information into the Comp Rate field. Enter " 16.36 ".
20.	Click the Calculate Compensation button. Calculate Compensation
21.	Click the Save button.
22.	This complete <i>Record an Employee Promotion</i> . End of Procedure.





Record a Pay Rate Change

Procedure

In this topic you will learn how to **Record a Pay Rate Change**.

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Step	Action
1.	Click Main Menu > Workforce Administration > Job Information > Job Data.
2.	Enter the Empl ID number or the Last Name to search for an employee.
	Click the Search button.



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Employee		Empl Record:	0				
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HR Status:	Active	Reason:	Other Data Changes		•		
Payroll Status:	Active	*Job Indicator:	Primary Job		•		
	00017787			Cu	rrent		
Position Number:	Use Position Data	ACCOUNTING SPE	CIALIST 2				
Acad Rank:	04/29/2002						
Position Entry Date:	Position Management	Record					
*Regulatory Region:	USA	United States					
Company:	001	LSUHSC-New Orle	906				
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*Department:	NO1651200	A/S-Cashier's Office	e-LRC				
Department Entry Date:	11/02/1998						
*Location:	484400004 🔍	ACCOUNTING SEF	VICES/CASHIER'S				
Establishment ID:				Date Created:	05/17/2012		
Last Start Date:	11/02/1998						
Expected Job End Date:	31						
Job Data	Employment Data	Earnings D	istribution	Benefits Progra	am Participation		
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Step	Action
3.	Click the Add a new row at row 1 button.
4.	Click the Choose a date button.
5.	Click the desired date.
6.	Click the button to the right of the Action field.
7.	Click the Pay Rate Change list item. Pay Rate Change
8.	Click the button to the right of the Reason field.
9.	Click the Sal In - Legislative list item. Sal Inc - Legislative
10.	Click the Compensation tab.
11.	NOTE: The employee's current Compensation Rate is \$14.63 and the Change Amount is 0.000000.



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Effective Date:	06/01/2012			Go	To Row		
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HR Status:	Active	Reason:	Sal Inc - Legislative				
Payroll Status:	Active	Job Indicator:	Primary Job				
	14.63			H Hourly	re		
Compensation Rate: Comparative Informa		000	*Frequency:	Hourly			
Change Amount:	0.000000	USD Hourly					
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Step	Action
12.	Click the Changes tab.
13.	Enter the desired information into the Change Percent field. Enter " 3 ".
14.	Click the Calculate Compensation button. Calculate Compensation
15.	NOTE: The employee's Compensation Rate has changed from 14.63 to 15.07. The Change Amount is now 0.438947 instead of 0.000000, and the Change Percent is 3.000 instead of 0.000
16.	Click the Save button.
17.	This completes <i>Record a Pay Rate Change</i> . End of Procedure.





Record an Employee Termination

Procedure

In this topic you will learn how to **Record an Employee Termination**.

Step	Action
1.	Click Main Menu > Workforce Administration > Job Information > Job Data.

avorites Main Menu >			Home	Add to Favorites Sig
· ·	Workforce Administration > Job Information	> Job Data		
				New Window Help
Job Data				
Enter any information you h	ave and click Search. Leave fields blank for a list	of all values.		
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	sic Search 📓 Save Search Criteria			

Step	Action
2.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
3.	Click the Search button.



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	00018089			Hist	ory		
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lusiness Unit:	LSUNO	LSUMC New Orlea					
epartment:	NO1553000	Family Nursing (for	rmerly: Grad				
epartment Entry Date:	05/17/2012						
ocation:	455940000	NURSING - FAMILY					
Establishment ID:			Di	ate Created:	05/17/2012		
ast Start Date:	02/11/1992						
Expected Job End Date:	31						
ob Data	Employment Data	Earnings D	Distribution	Benefits Progra	m Participation		
Save Save Save	ch 🐨 Notify 🔗 Refresh		题 Update/Display	Include History	Correct History		

Step	Action
4.	Click the Add a new row at row 1 button.
5.	NOTE: The Effective Date defaults to the current date. If the termination date is not the current date, enter the correct termination date in the Effective Date field or select it by clicking the Choose a date (calendar) button.
6.	Click the button to the right of the Action field.
7.	Click the Termination list item. Termination
8.	Click the button to the right of the Reason field.
9.	Click the Family Reasons list item. Family Reasons
10.	NOTE: A warning message displays to inform you the employee will be inactivated from Time and Labor. Click the OK button.
11.	Click the OK button.



Step	Action
12.	This completes <i>Record an Employee Termination</i> . End of Procedure.





Record an Employee Rehire

Procedure

In this topic you will learn how to **Record an Employee Rehire**.

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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



awytes Main Menu > Wolkforce Administration > Job Information > Job Data Lob Data Enter any information you have and click Search. Leave fields blank for a list of all values. Fund Existing Value Main mumber of rows to return (up to 300): 300 Empl Record: begins with • begins with • Second Last Name: begins with • begins with • begins with • begins with • character Name: begins with • begins with • character Name: character Name: character Name: character Name: character Name: character Name: chara	avorices main Menu > V	vorkrorce Adminis	uracion > Job Informa			
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aximum number of rows to return (up to 300): 300 mpl ID: begins with ame: begins with econd Last Name: begins with Iternate Character Name: begins with begins with itedle Name: begins with Case Sensitive	nter any information you have	e and click Searc	h. Leave fields blank for	a list of all values.		
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Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
6.	Click the Search button.



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ork Location	mation Job Labor Pa	iyroll <u>S</u> alary Plan	<u>C</u> ompensation		<u>1010 1 0100101120 040</u> 1
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Effective Date:	06/25/2005			Go To Row 🛨 🖃	
Effective Sequence:	0	*Action:	Termination	•	
HR Status:	Inactive	Reason:	Vol Res-Accepted A	nother Job 👻	
Payroll Status:	Terminated	*Job Indicator:	Primary Job	-	
Position Number: Acad Rank:	00018140 Q Override Position Date		ASSISTANT 3	History	
Position Entry Date:	03/01/2004				
Regulatory Region:	USA	United States			
Company:	001	LSUHSC-New Orle	eans		
Business Unit:	LSUNO	LSUMC New Orlea	ins		
Department:	NO1492000	Medicine			
Department Entry Date:	03/01/2004				
Location:	449640000	MEDICINE/NEW O	RLEANS		
Establishment ID:	Q			Date Created: 07/11/2005	
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Job Data	Employment Data	Earnings D)istribution	Benefits Program Participation	

Step	Action
7.	Click the Add a new row at row 1 button.
8.	NOTE: The Effective Date defaults to the current date. If the rehire date is not the current date, enter the correct rehire date in the Effective Date field or select it by clicking the Choose a date (calendar) button.
9.	Click the button to the right of the Action field.
10.	Click the Rehire list item. Rehire
11.	Click the button to the right of the Reason field.
12.	Click the Non-Comp Re-emp Prob/Prior St list item. Non-Comp Re-emp Prob/Prior St
13.	NOTE: Make sure to verify each field and enter the new position number. Rehires are rarely rehired back into their old position, since key fields are similar to those of a new hire, it's important to verify each field for accuracy. Click the Save button.
14.	This completes <i>Record an Employee Rehire</i> . End of Procedure.





View Job Summary Information

Procedure

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

	Home Add to Favorites	Sign out
orites Main Menu	Personalize Content Lavo	ut <u>Hel</u>
		<u> 101</u>

Step	Action
1.	Click the Main Menu button.
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



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Step	Action
6.	Enter the Empl ID and click the Search button.



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irg elation		Effective Date	Seq	Action	Action Reason	Key Person	Go To Job	
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MP	0	09/01/2004	1	Pay Rt Chg	12-000		Job Data	
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MP	0	03/01/2004	0	Hire	01-101		Job Data	
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Step	Action
7.	The General tab displays Action and Action Reason.
	Click the Job Data link. Job Data



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Department Entry Date:	03/01/2004				
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Step	Action
8.	Click the Close button.



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Return to	Search							

Step	Action
9.	Click the Job Information tab.
10.	The Job Information screen displays Employee Status, Standards Hours and Work Period.
	Click the Work Location tab.
11.	The Work Location screen displays Position and Department information.
	Click the Salary Plan tab.
12.	The Salary Plan screen displays Salary Plan, Grade and Pay Group information.
	Click the Compensation tab.
13.	Click the Components link. Components





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Step	Action
14.	Click the OK button.



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Step	Action
15.	Click the Show all columns button to expand the tabs. This will allow the user to view all data located on the tabs.
16.	Click the Show tabs button to collapse the view back to individual tabs.
17.	Click the Return to Search button.



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Step	Action
18.	If you would like to view another employee's Job Summary, click the Clear button to clear the previous search criteria, to enter another Empl ID.
19.	This completes <i>View Job Summary Information</i> . End of Procedure.



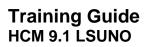
Record an Employee Data Change

Procedure

In this topic you will learn how to Record an Employee Data Change.

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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





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Step	Action
5.	You can search for an employee using either the Empl ID or the Last Name. You must include the preceding zeros when entering the Empl ID.
	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
6.	Click the Search button.



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ormat Type:	English	
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Step	Action
7.	Click the Contact Information tab.
	Contact Information



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Step	Action				
8.	Click the View Address Detail link.				
	View Address Detail				



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Step	Action
9.	Click the Add a new row at row 1 button.
10.	Click the Add Address link. Add Address



Training Guide HCM 9.1 LSUNO

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Favorites Main Menu > Workforce Administration > Personal Information > Modify a Person	New Window Help Customize Page 📾
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Step	Action
11.	Enter the desired information into the Address 1 field. Enter "1515 Pine Street".
12.	Enter the desired information into the Postal field. Enter "70111".
13.	Click the OK button.



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Step	Action
14.	Click the OK button.



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Step	Action
15.	Click the View Address Detail link.
	View Address Detail



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Step	Action
16.	Click the Add a new row at row 1 button.



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Step	Action
17.	Click the Add Address link. Add Address
18.	Enter the desired information into the Postal field. Enter " 1515 Pine Street ". NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P.O. Box numbers, etc.
19.	Enter the desired information into the Postal field. Enter "70111".
20.	Click the OK button.



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Step	Action
21.	Click the OK button.



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Step	Action
22.	Click the Save button.
23.	This completes <i>Record an Employee Data Change</i> . End of Procedure.



Budget Information

View Department Budget Tables

Procedure

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

NOTE: 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.

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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

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Step	Action
6.	Click the Department Budget Table USA menu.
	Department Budget Table USA

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Step	Action
7.	Enter the desired information into the Position Number field. Enter " 8-Digit Position Number ".
8.	Click the Search button.
9.	Click the Fiscal Year link.



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Step	Action
10.	Click the Dept Budget Earnings tab.
11.	Dept Budget Earnings Fields:
	Effective Date - The date the actions begins.
	Combination Code - The 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.
	NOTE: All of the remaining tabs contained in the component function in the same way.



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Step	Action
12.	Click the Dept Budget Deductions link.
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Step	Action
13.	Click the Fringe Benefit Description link.
14.	Click the Dept Budget Taxes tab. Dept Budget <u>Taxes</u>

Training Guide HCM 9.1 LSUNO



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Step	Action
15.	Click the Locality Description link.
16.	Click the Combination Code Description link.
17.	Click the Distributed link.



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Step	Action
18.	Click the Return to Search button.
19.	This completes <i>View Department Budget Tables - LSUNO</i> . End of Procedure.



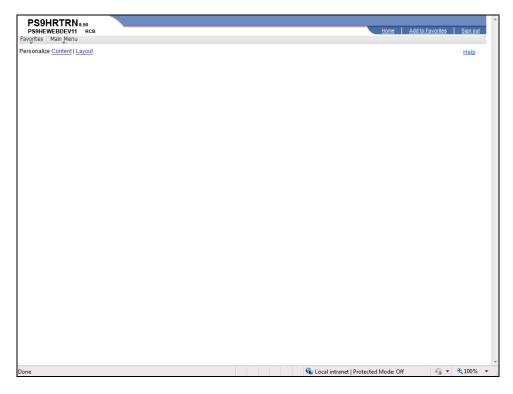


Faculty Tenure

View Faculty Tenure

Procedure

In this topic you will learn how to View Faculty Tenure.



Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Workforce Development menu. Workforce Development
3.	Click the Faculty Events menu. Faculty Events
4.	Click the Calculate Tenure menu. Calculate Tenure
5.	Click the Review Rank/Status History menu. Review Rank/Status History



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Step	Action
6.	Enter the desired information into the Empl ID field. Enter " 7-Digit Empl ID Number ".
7.	Click the Search button. Search



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Step	Action
8.	View the Academic Rank and Tenure.
	Click the Return to Search button.
9.	This completes the <i>View Faculty Tenure</i> . End of Procedure.