

PeopleSoft Training

Human Resources Inquiry -LSUNO 9.1

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Human Resources Inquiry - LSUNO 9.1

Workforce Administration

Workforce Administration

When employees are hired, they must be added into PeopleSoft Human Resources database (PS9HRPRP). Before other Human Resources tasks are initiated, essential employee data including personal, employment, job and benefit-related information must be entered. This is how we begin tracking a complete work history for each employee in our organization. This lesson 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.

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Step	Action
1.	Click the Main Menu button. Main Menu



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Step	Action
2.	Click the Workforce Administration menu > Personal Information menu,
	then click the Modify a Person menu.



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Step	Action
3.	You can search for an employee using either the Empl ID or the Last Name . Using the Last Name is demonstrated in this exercise.
	NOTE: The Employee ID number is designated as Empl ID. All Empl ID's contain seven (7) digits. Preceding zeros must be included when entering the Empl ID.
	To use the Empl ID option, enter the employee's seven (7) digit number into the Empl ID field and click the Search Button. It is not recommended to use any of the other search fields.
4.	Click the Search button. Search
5.	View the Biographical Details panel.



٧	Biographical Details Fields
	Person ID - This is the same as Empl ID.
	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.



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Step	Action
6.	Click the View Name button. View Name



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Step	Action
7.	Click the OK button.



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Step	Action
8.	Click the Contact Information tab.
9.	View the Contract Information panel.



Contact Information Fields
 Person ID - Is the same as Empl ID.
 Address Type - Home is the defaulted type.
 As of Date - This is the effective date of any address change.
 Status - Indicated whether the employee is "active" or "inactive" within the system.
 Preferred - Indicates the telephone number/e-mail address that the employee prefers to be used to contact him/her.
 Email Type - Identifies various e-mail addresses at which the employee can be contacted.
 Email Address - The e-mail specified in the Global Address book will default for the employee.



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



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Step	Action
11.	Click the OK button.



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Step	Action
12.	Click the Regional tab.
13.	View the Regional panel.



۵	Regional Detail Fields
	Person ID - This is the same as the Empl ID.
	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.



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Step	Action
14.	Click the Home link to return to the main menu.
15.	This completes the View Personal Data topic. 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.

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Step	Action
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Step	Action
2.	Click the Workforce Administration menu > Job Information menu.

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Step	Action
3.	Click the Job Data page.



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Step	Action
4.	You can search for an employee using either the EmplID or the Last Name. To use the EmplID option, simply enter the employee's seven (7) digit number into the EmplID field and click the Search button. It is not recommended to use any of the other search fields.
	NOTE: The Employee ID number is designated as EmplID in PSHR9. All EmplID's contain seven (7) digits. You must include the preceding zeros when entering the EmplID.
	Click the Search button.
	Search
5.	View the Work Location panel.



۵	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 is 1; etc.
	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 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.



Work Location Tab Fields (continued)
Position Number - Is the number assigned to the specific position the employee is filling. 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 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 CenterEKLMC Earl K. Long Medical CenterHCSDA HCSD AdministrationHPLMC Huey P. Long Medical CenterLAKMC Lallie A. Kemp Medical CenterLJCMC Leonard J. Chabert Medical CenterLSUNO LSUMC Medical CenterMCLNO Medical Center of LA New OrleansUMCLA University Medical CenterWOMMC W. O. Moss Medical CenterWSTMC 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.



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*Business Unit:	LSUNO	LSUMC New Orleans								
*Department:	NO1673000	Information Technolo								
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Step	Action
6.	Click the Include History button to view past Job Data information associated with this employee.
7.	Click the Arrow buttons to navigate to additional rows of data, or click the Last and First links to move to the first and last row of data.
8.	Click the Job Information tab.



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HR Status:	Active	Reason:	Promotion-Unclass/Admin Duties				
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Entry Date:	09/01/2011	31					
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Step	Action
9.	Scroll to the bottom of the screen to view additional information.

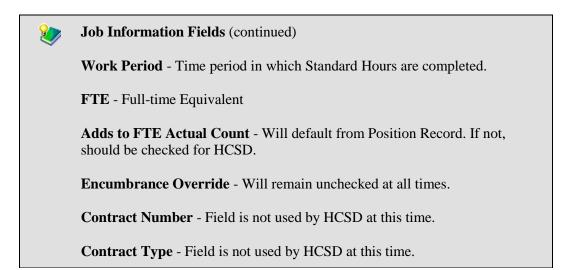


20	Job Information Fields
	Effective Date - Date the action begins.
	Effective Sequence - The method used to input multiple job actions on the same date. The first action is 0; the second is 1, etc.
	Job Indicator - Defaults over form the Work Location panel.
	Action/Reason - Defaults from the Work Location 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 (EmpIID) 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.



Job Information Fields (continued) Ø 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).





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Step	Action
10.	Click the Payroll tab.
11.	View the Payroll panel.



Payroll 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

Payroll Fields (continued)

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 at this time.

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

Edit ChartFields - Link is not used at this time.



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Step	Action
12.	Click the Salary Plan tab.
13.	View the Salary Plan panel.

🀲 🛛 Salary Plan Fields

Salary Administration - Is the type of plan the employee is on (AS, MS, PS, SS, TS and WS for Civil Service employees and UNC for unclassified employees.

Grade - This is the pay grade according to Civil Service's pay plan for the jobcode.

Grade Entry Date - Field is not used at this time.

Includes Wage Progression Rule - Field is not used at this time.

Step - Not used at this time

Step Entry Date - Not used at this time.



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Step	Action
14.	Click the Compensation tab.



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Step	Action
15.	Click the scrollbar to view additional data at the bottom of the screen.
16.	View the Pay components Time and Labor Pay Rules at the bottom of the Compensation panel.

Compensation Fields

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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.

Step	Action
17.	Click the Employment Data link. Employment Data
18.	View the Employment Information



Employment Information Fields ٧D 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. Probation Date - The day an employee obtains permanent status (Civil Service). Professional Experience Date - Field is not used at this time. Last Verification Date - Field is not used 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 automatic merit increase process. Next Merit Eligibility Date - The date the employee is eligible to receive a merit increase (Civil Service).



Employment Information Fields (continued)
 Appointment End Date - Date assignment will end.
 Contract Length - Field is not used at this.
 Accrue Tenure Services - Field is not used at this time.
 FTE For Tenure Accrual - Field is not used at this time.
 Service Calculation Group - Field is not used at this time.
 FTE for Flex Service Accrual - Field is not used at this time.



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Step	Action
19.	Click the scrollbar to view additional data at the bottom of the screen.
20.	Click the Benefits Program Participation link. Benefits Program Participation
21.	If the Benefit Program is equal to: FTP - the employee is eligible for benefits. FRP - the fellows and residents who are eligible for certain benefits NEL, or HCP - the employee is not eligible for benefits
22.	This completes the View Job Data topic. End of Procedure.





View a Job Summary

The **Job Summary** pages are a snapshot of an employee's LSU Health 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.

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Step	Action
1.	Click the Main Menu button. Main Menu



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Step	Action
2.	Click the Workforce Administration menu > Job Information menu.

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Step	Action
3.	Click the Review Job Information menu.



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Step	Action
4.	Click the Workforce Job Summary menu.
5.	You can search for an employee using either the EmplID or the Last Name.
	To use the EmplID option, simply enter the employee's seven (7) digit number into the EmplID field and click the Search button. It is not recommended to use any of the other search fields.
	The Employee ID number is designated as EmplID in PSHR9. All EmplID's contain seven (7) digits. You must include the preceding zeros when entering the EmplID.
	Click the Search button.



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Step	Action
6.	View the General panel.
	Click the Job Information link.



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Step	Action
7.	View the Job Information panel.
	Click the Work Location link.



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8.	View the Work Location panel.
	Click the Salary Plan link.



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Step	Action
9.	View the Salary Plan panel.
	Click the Compensation link.



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Step	Action
10.	View the Compensation panel.
	Click the Components link.



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11.	Click the Display In Other Currency button.



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13.	View the Amounts panel.
	Click the Controls link.



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Step	Action
14.	View the Controls panel. Click the Changes link.



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Step	Action
15.	View the Changes panel.
	Click the Conversion link.



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Step	Action
16.	View the Conversion panel.
	Click the OK button.
17.	Click the Home link.
18.	This completes the View a Job Summary topic. End of Procedure.



Monitor Absence

Procedure

In this topic you will learn how to Monitor Absence.

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Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Workforce Administration menu > Absence and Vacation menu >Track Absence lick the Summary by Employee menu.
3.	You can search for an employee using either the EmplID or the Last Name.
	The Employee ID number is designated as EmplID in PSHR9. All EmplID's contain seven (7) digits. You must include the preceding zeros when entering the EmplID.
	To use the EmplID option, simply enter the employee's seven (7) digit number into the EmplID field and click the Search button. It is not recommended to use any of the other search fields.



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Step	Action
4.	Click the Search button.



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MONTHLY-SICK LEAVE	USA	10/21/2011		10/21/2011				Absence Details	
MONTHLY-ANNUAL LEAVE	USA	09/19/2011		09/23/2011			40.00	Absence Details	
MONTHLY-SICK LEAVE	USA	08/18/2011		08/18/2011			8.00	Absence Details	
MONTHLY-SICK LEAVE	USA	07/28/2011		07/28/2011			8.00	Absence Details	
MONTHLY-ANNUAL LEAVE	USA	07/05/2011		07/08/2011			32.00	Absence Details	
MONTHLY-ANNUAL LEAVE	USA	06/01/2011		06/03/2011			24.00	Absence Details	
Save Return to Search 🖻	Notify								

Step	Action
5.	View the Absence Summary by Employee panel.
	The Absence Details link is not functional at this time.
6.	This completes the Monitor Absence topic. 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.

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



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Step	Action				
4.	You can search for an employee using either the Empl ID or the Last Name.				
	All Empl ID's contain (7) digits. You must include the preceding zeros when entering the Empl ID.				
	Enter the desired information into the Empl ID field. Enter "0000000".				
5.	Click the Search button.				



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hn Doe Employee ave Accruals		ID: Eine	Benefit Record:	0 1 of 96 🚺 <u>Last</u>			
ompany: 001 LSUHSC-New Orleans Ian Type: Sick ccrual Date: 11/30/2011	3	Benefit Program: FTP Fu Currency: USD					
Accrual Balances - Hours Carried over from previous year: Earned Year-to-Date: Taken Year-to-Date: Adjusted Year-to-Date:	224.000000 110.000000 32.000	Service Data Service Date: Service Hours: Unprocessed Data		01/16/2007 8,433.750			
Bought Year-to-Date: Sold Year-to-Date: Accrual Totals Hours Balance:	302.000000	Hours Taken: Hours Adjusted: Hours Bought: Hours Sold:					
Hours Value:	7,479.73	Service Hours:					
Return to Search							

Step	Action
6.	View the Leave Accrual Balances panel.
	NOTE: When you access the Leave Accrual Balances panel, the panel defaults to the current row of Sick Leave accrual.



PS9HRTRN8.50 PS9HEWEBDEV12 RCB Favorites Main Menu > Benefits > Manage Leave Accruals >	Review Accrual Balances	Home Add to Favorites Sign out
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Review Accrual Balances		
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Leave Accruals	Find View All First 🚺 1 of 96 🕨 Last	1
Company: 001 LSUHSC-New Orleans Plan Type: Sick Accrual Date: 11/30/2011	Benefit Program: FTP Full/Temp/Part-time Currency: USD	
Accrual Balances - Hours	Service Data	
Carried over from previous year: 224.000000	Service Date: 01/16/2007	
Earned Year-to-Date: 110.000000 Taken Year-to-Date: 32.000	Service Hours: 8,433.750	
Adjusted Year-to-Date: 32.000	Unprocessed Data	
Bought Year-to-Date:	Hours Taken:	
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Accrual Totals	Hours Bought:	
Hours Balance: 302.000000	Hours Sold:	
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Return to Search 🕑 Notify		
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Step	Action
7.	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 rows 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. This method is demonstrated here.



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Return to Search 🛛 🔁	Notify								

Step	Action
8.	Click the Find link.



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Leave Accruals		Benefit Record: 0 Find View All First 1 of 96 Last	
Company: 001 LSUHSC-New Orleans Plan Type: Sick Accrual Date: 11/30/2011	Benefit Program: FT Currency: US		
Accrual Balances - Hours Carried over from previous year: 224.000000	Service Data Service Date:	01/16/2007	
Earned Year-to-Date: 110.000000 Taken Year-to-Date: 32.000 Adjusted Year-to-Date: Bought Year-to-Date: Sold Year-to-Date: Sold Year-to-Date:	Service Hours: Unprocessed Data Hours Taken:	8,433.750	
Accrual Totals Hours Balance: 302.000000	Hours Adjusted: Hours Bought: Hours Sold:		
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Step	Action
9.	Enter the desired information into the field. Enter "Vacation".
10.	Click the OK button.



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eave Accruals		Find	View All First 🗹 4	9 of 96 🕨 <u>Last</u>		
company: 001 LSUHSC-New Man Type: Vacation Accrual Date: 11/30/2011	Orleans	Benefit Program: FTP Fu Currency: USD	ll/Temp/Part-time			
Accrual Balances - Hours		Service Data				
Carried over from previous year: Earned Year-to-Date: Taken Year-to-Date:	99.000000 154.000000	Service Date: Service Hours:		01/16/2007 8,433.750		
Adjusted Year-to-Date: Bought Year-to-Date:	152.000	Unprocessed Data Hours Taken:				
Sold Year-to-Date: Accrual Totals		Hours Adjusted: Hours Bought:				
Hours Balance: Hours Value:	101.000000 2,501.50	Hours Sold: Service Hours:				
Return to Search 💽 Notify					-	

Step	Action
11.	The current Vacation row displays. You may use the scroll areas to view additional rows of Vacation accruals. Click the Home link.
12.	This completes the Review Accrual Balances topic. End of Procedure.





Review Employee Data Summary

Procedure

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

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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 Benefits menu.
2.	Click the Employee/Dependent Information menu.
3.	Click the Review HR/Job/Payroll Data menu.



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Step	Action
4.	You can search for an employee using either the Empl ID or the Last Name.
	All Empl ID's contain (7) digits. You must include the preceding zeros when entering the Empl ID.
	Enter the desired information into the Empl ID field. Enter "0000000".
5.	Click the Search button.



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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 Fac	ultyStaff (New Or					
Company:	LSUHSC-Net	w Orleans					
Employee Type:	Salaried						
Business Unit:	LSUNO	LSUMC New C	rleans				
Job Code:	404	IT ANALYST 2					
Supervisor Level:							
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Location Code:	434150000	COMPUTER S	ERVICES				
Annual Benefits Base Rate:							
National ID							
Country: USA	NID Type:	PR SSN	National ID:	110-11-5576			
Gender:	Male						
Marital Status:	Single						
Significant Dates							
First Start Date:	01/16/2007	,	Service Date:	01/16/2007			
Company Seniority Date:	01/16/2007	,	Last Start Date:	12/17/2007			
Termination Date:			Date of Birth:	05057876			

Step	Action
6.	View the Employee Data Summary page.
	Click the scrollbar.



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Regular/Temporary:	Regular							
Standard Hours:	40.00							
Work Period:	Weekly							
Pay Group:	Full-time Facu	ultyStaff (New	/ Or					
Company:	LSUHSC-New	v Orleans						
Employee Type:	Salaried							
Business Unit:	LSUNO	LSUMC Ne	w Orleans					
Job Code:	404	IT ANALYST	Т2					
Supervisor Level:								
Department:	NO1673000	Information	n Technology-Adminis					
Location Code:	434150000	COMPUTE	R SERVICES					
Annual Benefits Base Rate								
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Gender:	Male							
Marital Status:	Single							
Significant Dates								
First Start Date:	01/16/2007		Service Date:	01/16/2007				
Company Seniority Date:	01/16/2007		Last Start Date:	12/17/2007				
Termination Date:			Date of Birth:	01/01/12/16				
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Step	Action
7.	Click the Return to Search button.
8.	This completes the Review Employee Data Summary topic. 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.

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Step	Action
1.	Click the Main Menu button. Main Menu



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-	Search Menu: Search Menu: Search Menu: Search Menu: Workforce Administration Benefits Compensation Time and Labor Payroll Interface Workforce Development Organizational Development Enterprise Learning Workforce Monitoring Set Up HRMS Reporting Tools People Tools LSUHSC Processes My Personalizations	Employee Pay Data USA Payrol Processing USA Retractive Payroll Payroll Distribution Payroll Distribution Payroll Distribution Payroll Distribution Payroll Distribution Vus. Quarterly Processing U.S. Annual Processing	A Create and Load Paysheets Cruptate Paysheets St Cruptate Paysheets St Rever Processing Messar Dig Produce Payrol Calculate	<u>Help</u>
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Step	Action
2.	Click the Payroll for North America menu > Payroll Processing USA menu >
	Produce Payroll menu, and the Review Paycheck Summary menu.
	Review Paycheck Summary



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Step	Action
3.	You can search for an employee using either the Empl ID or the Last Name. All Empl ID's contain seven (7) digits. You must include the preceding zeros when entering the Empl ID. Enter the desired information into the Empl ID field. Enter "0000000".
4.	Click the Search button. Search



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Step	Action
5.	All paychecks for an employee will display with the oldest at the top (ascending order). The end-user should take note of the Pay Period End Date when attempting to view a paycheck.
	To change the order of paychecks from the oldest (ascending order) pay period end date to the most current (descending order) pay period end date; double-click the Pay Period End Date column title. Pay Period End Date



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Step	Action
6.	The Pay Period End Date now lists paychecks in descending order, with the most current paycheck distributed listed first.
	Click the 01/31/2012 option in the Pay Period End Date column. 01/31/2012



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Empl ID: entresting Name: County 111-116, June				
	2 Page: 296	Line: 6 Separate Check:		
Paycheck Information		Paycheck Totals		
		Earnings: 4.293		
Paycheck Status: Calculated Paycheck Option: Check		Taxes: 636		
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Step	Action
7.	The Paycheck Summary page summarizes the information found on the paycheck or the pay advice (direct deposit) statement.
	Check # is the actual Check Number or the Advice Number (i.e. employees who have direct deposit will have an Advice Number).
	Click the Expand section button.



NMF Pay Period End: 01/31/2012 Pag	ge: 296 Line: 6 Separate C		
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Step	Action
8.	View the Earnings section.
	Click the Collapse section button. ■
9.	Click the Expand section button.



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Step	Action
10.	View the Deductions section.
	Click the Collapse section button.
11.	Click the Expand section button.



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Step	Action
12.	View the Taxes section.
	Click the Home link.
13.	This completes the Review Paycheck Summary topic. End of Procedure.





Review Actuals Distribution

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

Procedure

In this section you will learn how to Review Actuals Distribution.

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Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Payroll Processing USA menu.
3.	Click the Payroll Processing USA menu, and the Produce Payroll menu.
4.	Click the Payroll Processing USA menu > Payroll Processing USA menu > Produce Payroll menu, then click the Review Actuals Distribution menu.
5.	You can search for an employee using either the Empl ID or the Last Name. All Empl ID's contain seven (7) digits. You must include the preceding zeros when entering the Empl ID. Click the Search button.



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Step	Action
6.	All paychecks for an employee will display with the oldest at the top (ascending order). The end-user should take note of the Pay Period End Date when attempting to view a paycheck.
	To change the order of paychecks from the oldest (ascending order) pay period end date to the most current (descending order) pay period end date; double-click the Pay Period End Date title column title. Pay Period End Date



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Step	Action
7.	The Pay Period End Date now lists paychecks in descending order, with the most current paycheck distributed listed first.
	Click 12/31/2011 option in the Pay Period End Date column.
8.	The account(s) to which the employee's pay is being charged are found on the Earnings panel.



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Step	Action
9.	Click the Deductions tab.



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Step	Action
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Step	Action
11.	View the Taxes Tab
	Click the Home link.
12.	This completes the Review Actuals Distribution topic. End of Procedure.



Workforce Development

View Professional Education & Training

The **Person Profile/Education** page shows all of an employee's educational degrees.

Procedure

In this topic you will learn how to View Professional Education & Training.

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Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Workforce Development menu > Profile Management menu > Profiles menu, and the Person Profiles menu.



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Step	Action
3.	You can search for an employee using either the Empl ID or the Last Name. All Empl ID's contain seven (7) digits. You must include the preceding zeros when entering the Empl ID. Enter the desired information into the Empl ID field. Enter "0000000".
4.	Click the Search button.
	Search



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Step	Action
5.	Click the Education link. Education



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Step	Action
6.	Click the Bachelor's Degree link.
	Bachelor's Degree



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"Status:				
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State:	LA	Louisiana		
School Code:	002015	New Orleans, University of		
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Ste	р	Action
7.		Click the scrollbar to scroll to the bottom of the screen.



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Step	Action
8.	Click the OK button.



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Step	Action
9.	Click the Home link.
10.	This completes the View Professional Education & Training topic. End of Procedure.





View Faculty Tenure

Procedure

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

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Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Workforce Development menu > Faculty Events menu > Calculate Tenure menu, and the Review Rank/Status History menu.



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Step	Action
3.	You can search for an employee using either the Empl ID or the Last Name. All Empl ID's contain seven (7). You must include the preceding zeros when entering the Empl ID. Enter the desired information into the Empl ID field. Enter "0000000".
4.	Click the Search button.



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Employee: Tenure Home: No1051000 Tenure Status: TEN Tenure Calc Group: Track Start Dt: 12/02/2000 Override Calc: Tenure Granted Date: Home Department Rank/Status Change History End View Al First 1 of 1 Last	
Eff Date Academic Rank Tenure Status Action Date Change Reason	
Return to Search	
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Step	Action
5.	View the Change History page for the employee's Academic Rank and Tenure Status. Click the Home link.
6.	This completes the View Faculty Tenure topic. 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.

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Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Organizational Development menu > Position Management menu > Maintain Positions/Budgets menu, and the Add/Update Position Info menu Add/Update Position Info



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Favorites Main Menu > Org	ganizational Development > Position Manage	ement > Maintain Positions/Budgets > Add/Update Position Info	
			New Window Help
Add/Update Position Inf	io		
Enter any information you have	and click Search. Leave fields blank for a list o	of all values.	
Find an Existing Value	dd a New Value		
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Position Number:	begins with 👻		
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Step	Action
3.	The Position Number is an 8-digit number. You must include the preceding zeros when entering the position number. The Position Number can be found on the Work Location panel of the Job Data section. Enter the desired information into the Position Number field. Enter " 00034097 ".
4.	Click the Search button.



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Position Status:	Approved 👻	Status Date: 08/01/20	01 🗵	Key Position				
Job Information								
Business Unit:	LSUNO 🤍 LSUM	IC New Orleans						
Job Code:	264 🔍 PRC	JECT COORDINATOR						
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Step	Action
5.	View the Description page.



Description Fields

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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 -

Status Date - Date the action began.

Key Position -

Dot-Line - Is not used at this time.

Security Clearance - Is not used at this time.



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Step	Action
6.	Click the Down button of the scrollbar to view additional information on the Description page.



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Position Number: 00034097	
Headcount Status: Filled Current Head Count: 1 out of 1	
*Effective Date: 06/16/2002 📴 *Status: Active 👻	
Reason: UPD Position Data Update Action Date: 06/14/2002	
*Position Status: Approved Status Date: 08/01/2001 Key Position	
Job Information	_
*Business Unit: LSUNO 🔍 LSUMC New Orleans	
*Job Code: 264 ROJECT 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	
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*Reg Region: USA Q United States	
*Department: N01673200 PEOPLESOFT ADMIN Company: 001 LSUHSC-New Orleans SUPPORT ORG	
*Location: 498150001 Q PEOPLESOFT/MATT GEDGE/HOME COD	
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Step	Action
7.	Click the Detailed Position Description link.
	Detailed Position Description



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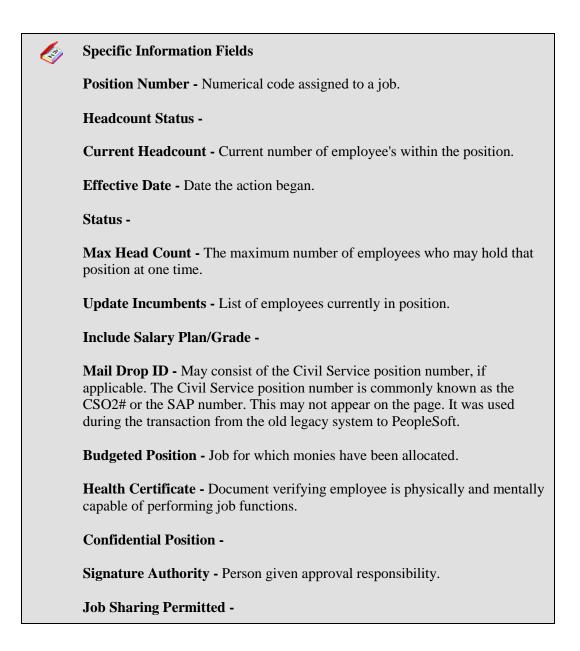
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8.	Click the OK button.



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Step	Action
9.	Click the Specific Information tab.
	Specific Information
10.	View the Specific Information panel.







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		Include Salary Plan/Grade	
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Health Certificate:	-	Confidential Position	
Signature Authority:	-	Available for Telework	
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11.	Click the Budget and Incumbents tab.
	Budget and Incumbents



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Step	Action
12.	View the Budget and Incumbents panel.

Market and Incumbents Fields

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.



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Step	Action
13.	Click the Job Data link.



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*Effective Date:	05/01/2011 🗾			Go To Row	+ -	
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Business Unit:	NO1673200	LSUMC New Orlean				
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Department Entry Date: *Location:	488150001					
Establishment ID:		PEOPLESOFTMAT	GEDGE/HOME COD	Date Created: 05/20/	2011	
Last Start Date:	11/01/2006					
Expected Job End Date:	H					
Job Data	Employment Data	Earnings Di	stribution	Benefits Program Partici	pation	

Step	Action
14.	Click the Cancel button to return to the Budget and Incumbents page.
	Cancel



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15.	Click the Position Attribute tab. Position Attribute			
16.	View the Position Attribute panel.			



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Description Specific Information Budget and Incumbents Position Attribute	
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Step	Action
17.	Click the Home link.
18.	This completes the Manage Positions topic. End of Procedure.





Enterprise Learning

Review Training Summary

Procedure

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

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Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Enterprise Learning menu > Result Tracking menu, and the Review Training Summary menu.
3.	You can search for an employee using either the Empl ID or the Last Name. All Empl ID's contain seven (7) digits. You must include the preceding zeros when entering the Empl ID. Click the Search button.



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Step	Action
4.	Click the Status object.
5.	View the Status panel.
6.	This completes the Review Training Summary topic. End of Procedure.



Budget Information

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

View Department Budget Table

Procedure

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

>

Step	Action
1.	Click the Main Menu, and click the Set Up HRMS menu.



Step	Action
2.	Click the Product Related menu.



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Step	Action
3.	Click the Commitment Accounting menu.



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Step	Action
4.	Click the Budget Information menu.



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Step	Action
5.	Click the Department Budget Table USA menu.
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Step	Action
6.	Enter the desired information into the Position Number field. Enter "00034097".
7.	Click the Search button.



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Step	Action
8.	Click the Fiscal Year link.



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Step	Action
9.	The Dept Budget Date panel is a suspense account and does not contain information that is useful to the end user.
	Click the Dept Budget Earnings tab.



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Step	Action
10.	View the Dept Budget Earnings panel.

🕢 Dept Budget Earnings Fields

Effective Date - The date the action begins.

Status - Indicates whether 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 combination is established in the general Ledger to accurately identify specific funding sources for financial transactions. **Combination Codes** are used to identify funding sources for budget purposes.

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 were debited.

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



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Step	Action		
11.	Click the Dept Budget Deductions link.		
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Step	Action			
12.	View the Dept Budget Deductions panel.			
	Click the Return to Search button.			
13.	This completes the View Department Budget Table topic. End of Procedure.			