



PeopleSoft Training

Develop Workforce HCM 9.1 LSUNO

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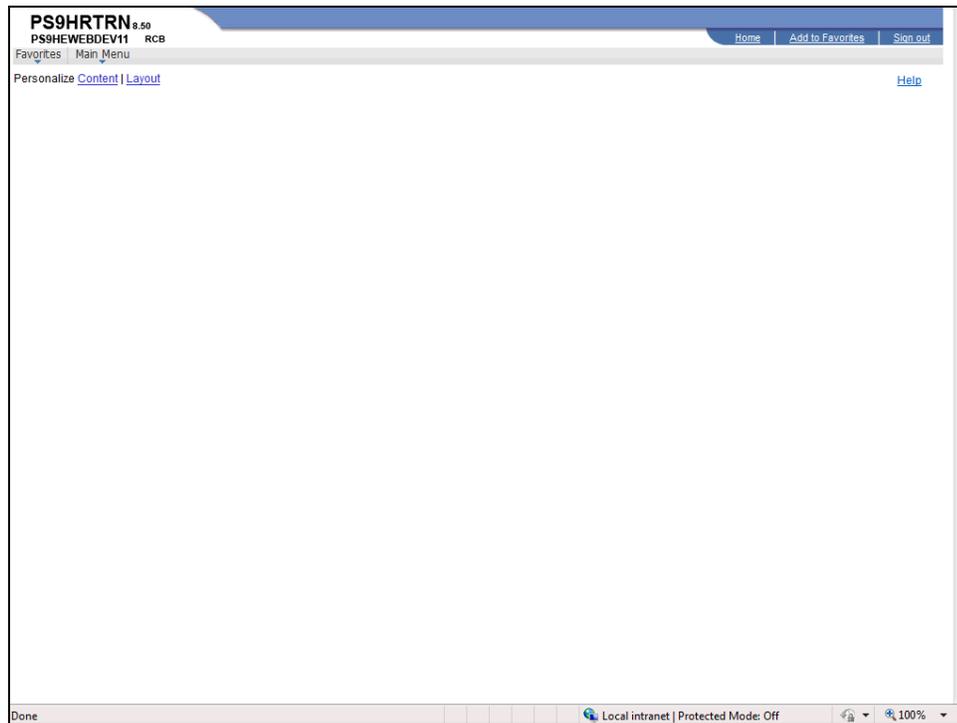
Develop Workforce HCM 9.1 LSUNO

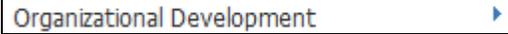
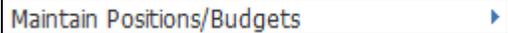
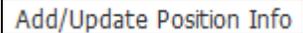
Manage Positions

Create a Position

Procedure

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



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

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

[New Window](#) | [Help](#) | 

Add/Update Position Info

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](#)

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

Position Number:

Description:

Position Status:

Business Unit: 

Department: 

Job Code: 

Reports To Position Number:

Include History Correct History Case Sensitive

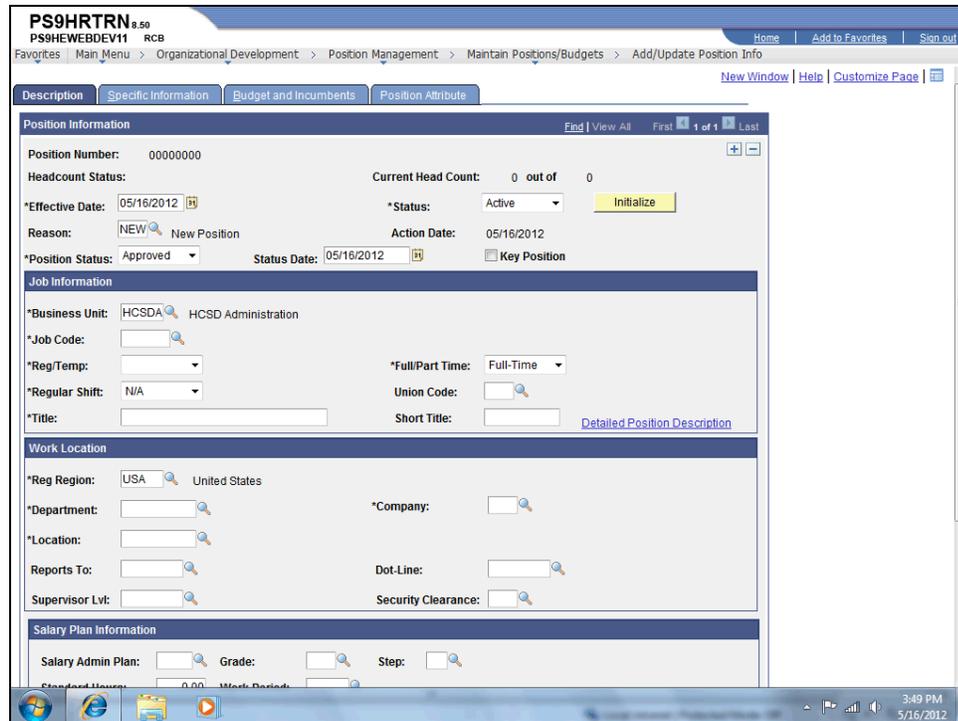
[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

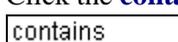
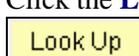
[Find an Existing Value](#) | [Add a New Value](#)

[Main Content](#)

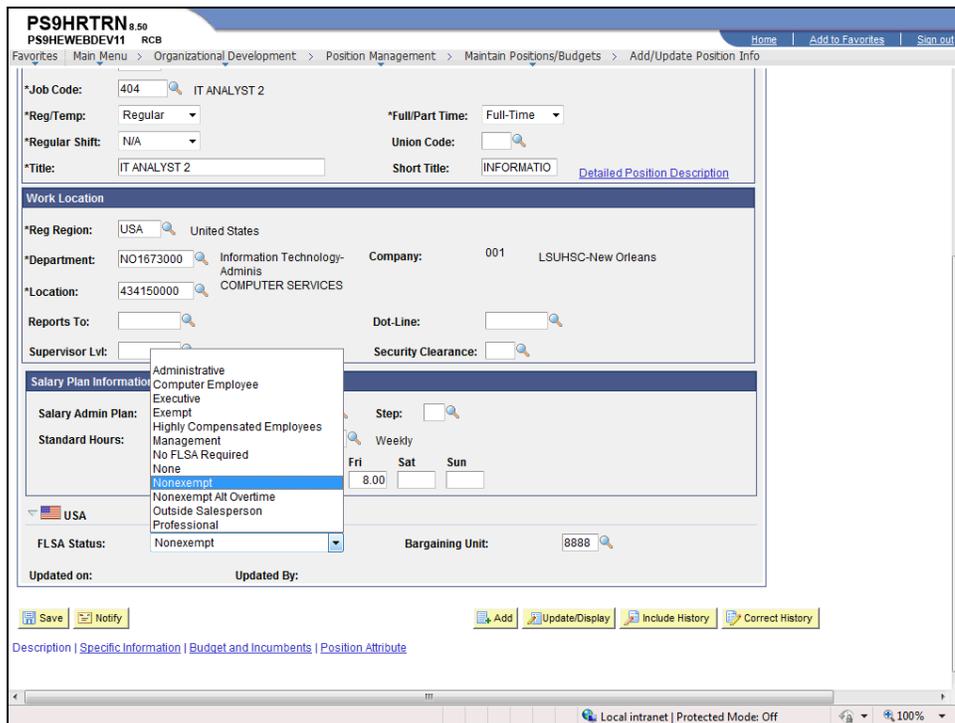
Done | Local intranet | Protected Mode: Off | 100%

Step	Action
6.	Click the Add a New Value tab. 
7.	Click the Add button. 



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.	<i>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.</i>
12.	<i>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.</i>
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.
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 selected for the position. Click the button to the right of the FLSA Status field.



Step	Action
22.	Click the Nonexempt list item.
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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Home | Add to Favorites | Sign out

Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

[New Window](#) | [Help](#) | [Customize Page](#) |

Description | **Specific Information** | Budget and Incumbents | Position Attribute

Position Number:
 Headcount Status: Current Head Count: 0 out of 0

Effective Date: 05/16/2012 Status: Active

Max Head Count:
 Mail Drop ID:
 Work Phone:
 Health Certificate:
 Signature Authority:

Incumbents

Update Incumbents
 Include Salary Plan/Grade
 Budgeted Position
 Confidential Position
 Job Sharing Permitted
 Available for Telework

Education and Government

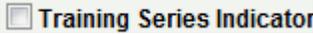
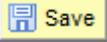
Position Pool ID:
 *Pre-Encumbrance Indicator: Immediate
 *Encumber Salary Option: Salary Step
 *Classified Indicator: Classified
 Calc Group (Flex Service):
 Academic Rank:
 FTE: 0.000000 Adds to FTE Actual Count

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Attribute](#)

Done Local intranet | Protected Mode: Off 100%

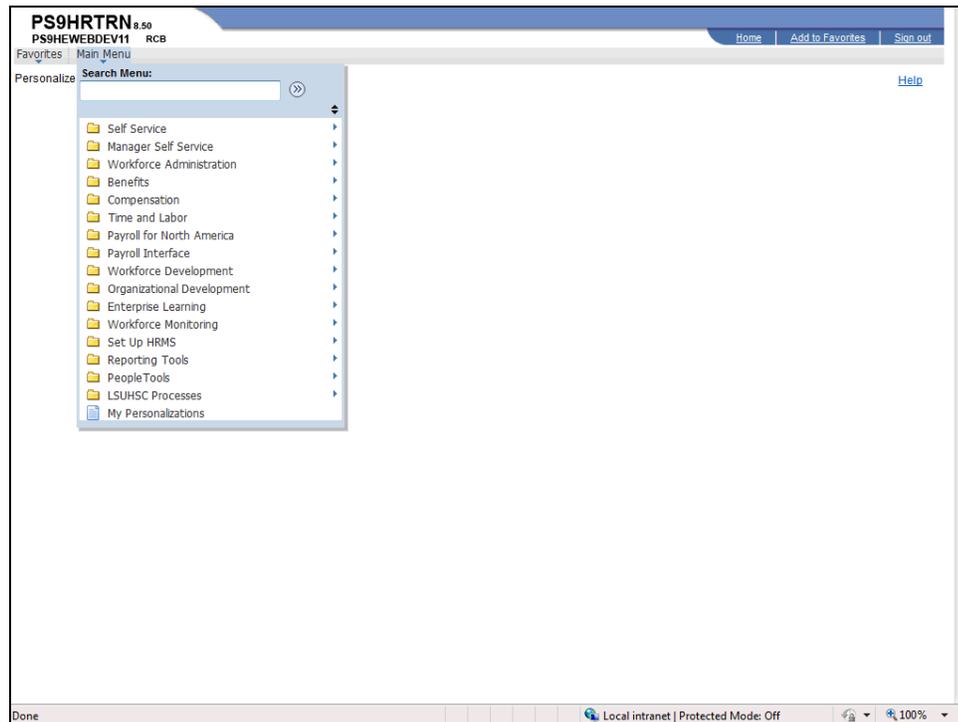
Step	Action
25.	Enter the desired information into the FTE field. Enter " 1 ".
26.	Click the Adds to FTE Actual Count option. <input type="checkbox"/> Adds to FTE Actual Count
27.	Click the Position Attribute tab. <input type="button" value="Position Attribute"/>

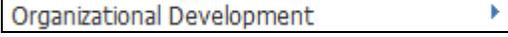
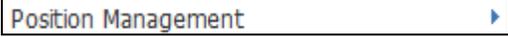
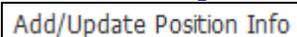
Step	Action
28.	Click the Training Series Indicator option. 
29.	Click the Save button. 
30.	NOTE: A new Position Number is assigned and changes from 00000000 to 00049728 after a successful save.
31.	This completes Create a Position . End of Procedure.

Update Position Data

Procedure

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



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

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

[New Window](#) | [Help](#) | 

Add/Update Position Info

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](#)

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

Position Number: begins with

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

Job Code: begins with

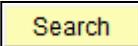
Reports To Position Number: begins with

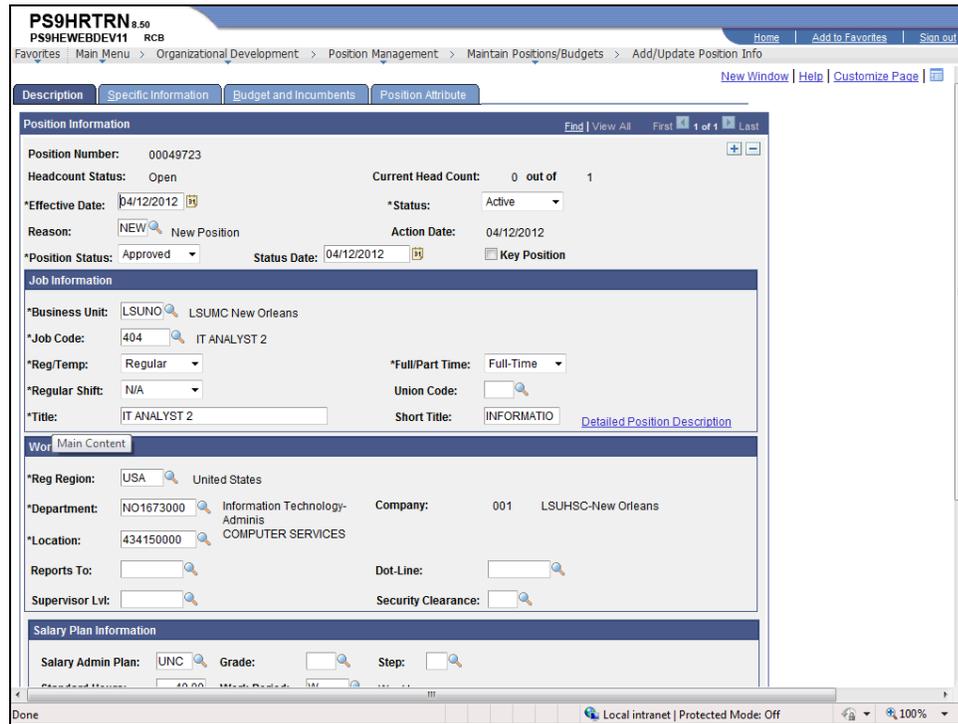
Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

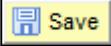
[Find an Existing Value](#) | [Add a New Value](#)

Done | Local intranet | Protected Mode: Off | 100%

Step	Action
6.	Enter the Position Number to update and click the Search button. 



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.	<i>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.</i>
11.	<i>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.</i>
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. 

Step	Action
16.	<i>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.</i>
17.	<i>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.</i>
18.	Click the Save button. 
19.	This completes <i>Update Position Data</i> . End of Procedure.

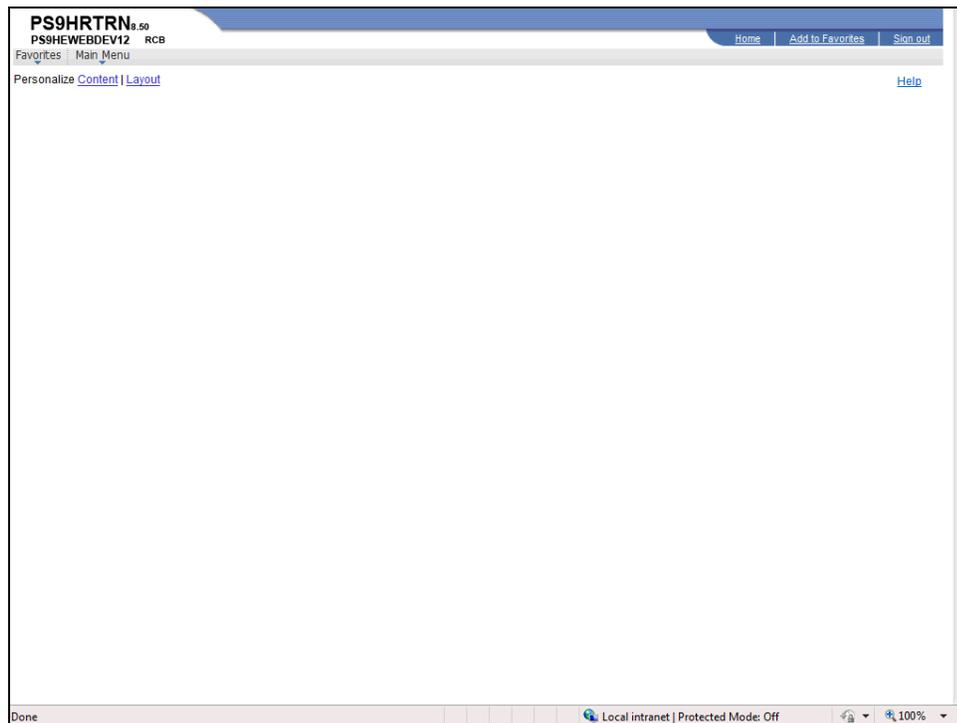
Employment Actions

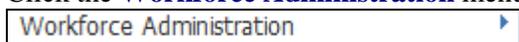
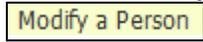
Add a Person - Classified

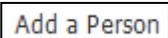
Procedure

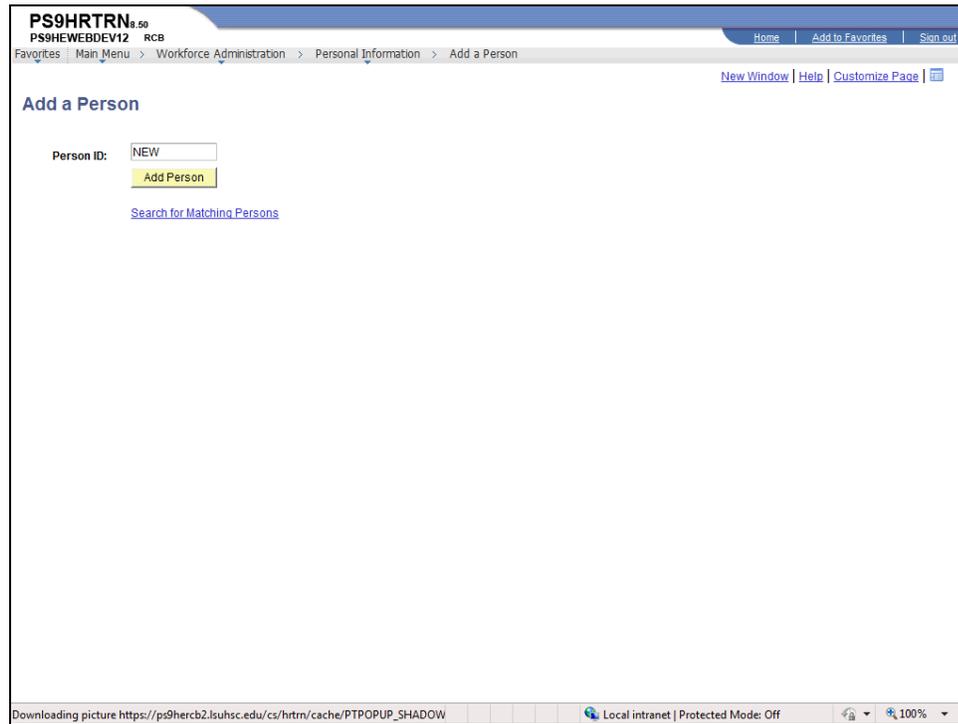
In this topic you will learn how to **Add a Person - Classified**.

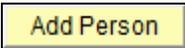
NOTE: Before you add a person, search for the person first to see if the person exists in the system. If the person is not in the system proceed to add a person.



Step	Action
1.	<p>NOTE: Before adding a person to the system, you <u>must</u> first check to make sure the person does not already exist in the system.</p> <p>Click the Main Menu button.</p> 
2.	<p>Click the Workforce Administration menu.</p> 
3.	<p>Click the Personal Information menu.</p> 
4.	<p>Click the Modify a Person menu.</p> 

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



Step	Action
9.	Click the Add Person button. 
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. <i>NOTE: The Effective Date is be the employee's hire date.</i>

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Add a Person

[New Window](#) | [Help](#) | [Customize Page](#)

Biographical Details | **Contact Information** | Regional | Organizational Relationships

Person ID: NEW

Name Find | View All | First 1 of 1 | Last

*Effective Date: 05/24/2012

*Format Type: English

Display Name:

Biographic Information

Date of Birth: 0 Years 0 Months

Birth Country: USA United States

Birth State:

Birth Location: Waive Data Protection

Biographical History Find | View All | First 1 of 1 | Last

*Effective Date: 05/24/2012

*Gender: Unknown

*Highest Education Level: A-Not Indicated

*Marital Status: Unknown As of:

Language Code:

Alternate ID:

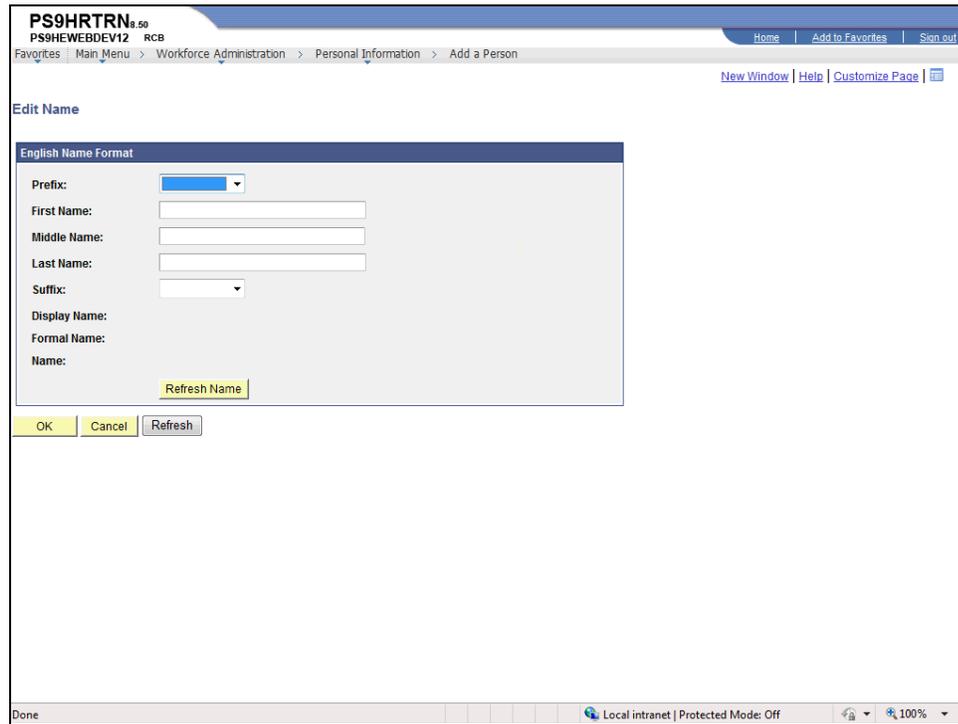
Full-Time Student

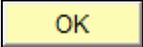
National ID Customize | Find | View All | First 1 of 1 | Last

*Country	*National ID Type	National ID	Primary ID
USA <input type="text"/>	Social Security Number <input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

Done Local intranet | Protected Mode: Off 100%

Step	Action
11.	Click the Add Name button. <input type="button" value="Add Name"/>

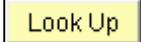
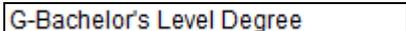


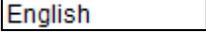
Step	Action
12.	Click the button to the right of the Prefix field. 
13.	Click the Ms list item. 
14.	Enter the desired information into the First Name field. Enter " Mary Jane ".
15.	Enter the desired information into the Last Name field. Enter " Doe ".
16.	Click the Refresh Name button. 
17.	Click the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

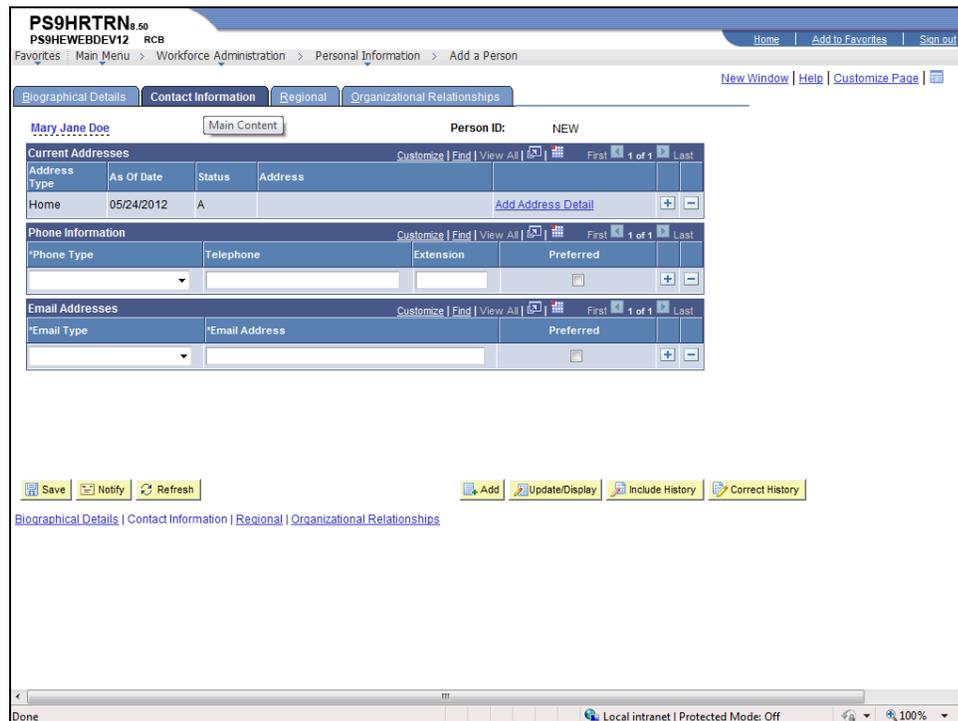
The screenshot shows a web application interface for adding a new person. The top navigation bar includes 'Home', 'Add to Favorites', and 'Sign out'. Below the navigation, there are tabs for 'Biographical Details', 'Contact Information', 'Regional', and 'Organizational Relationships'. The main content area is divided into several sections:

- Biographic Information:** Contains fields for 'Date of Birth' (set to 05/24/2012), 'Birth Country' (USA), 'Birth State' (United States), and 'Birth Location'. There is a 'Waive Data Protection' checkbox.
- Biographical History:** Contains fields for 'Effective Date' (05/24/2012), 'Gender' (Unknown), 'Highest Education Level' (A-Not Indicated), 'Marital Status' (Unknown), 'Language Code', and 'Alternate ID'. There is a 'Full-Time Student' checkbox.
- National ID:** A table with columns for 'Country', 'National ID Type', 'National ID', and 'Primary ID'. The first row shows 'USA' and 'Social Security Number'.

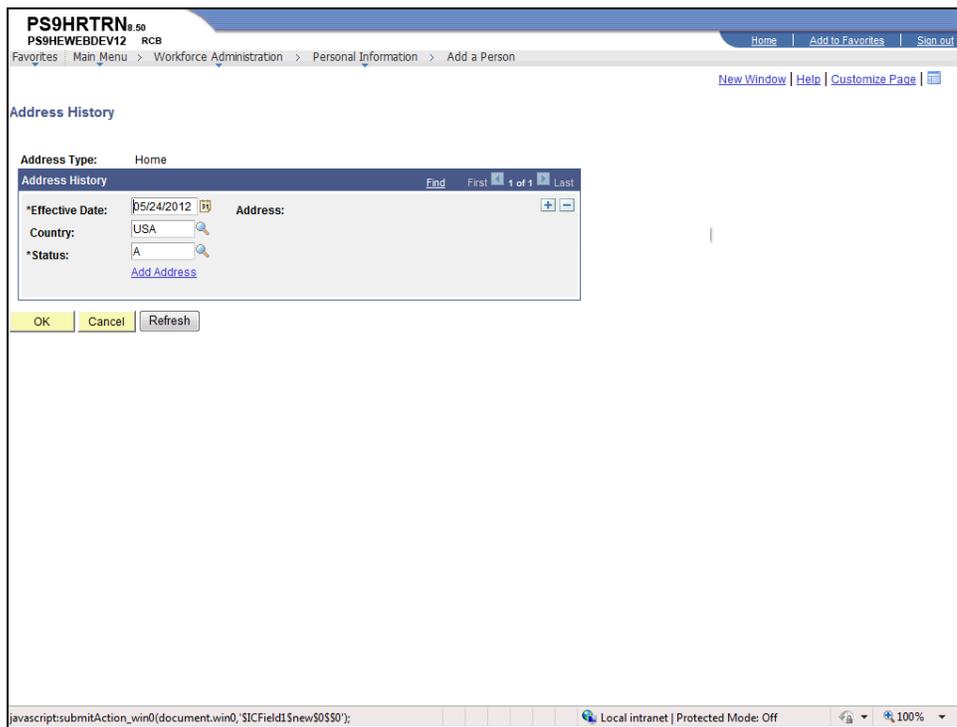
At the bottom of the form, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The browser status bar at the bottom indicates 'Local intranet | Protected Mode: Off'.

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. 
26.	Click the button to the right of the Highest Education Level field. 
27.	Click the G-Bachelor's Level Degree list item. 
28.	Click the button to the right of the Marital Status field. 

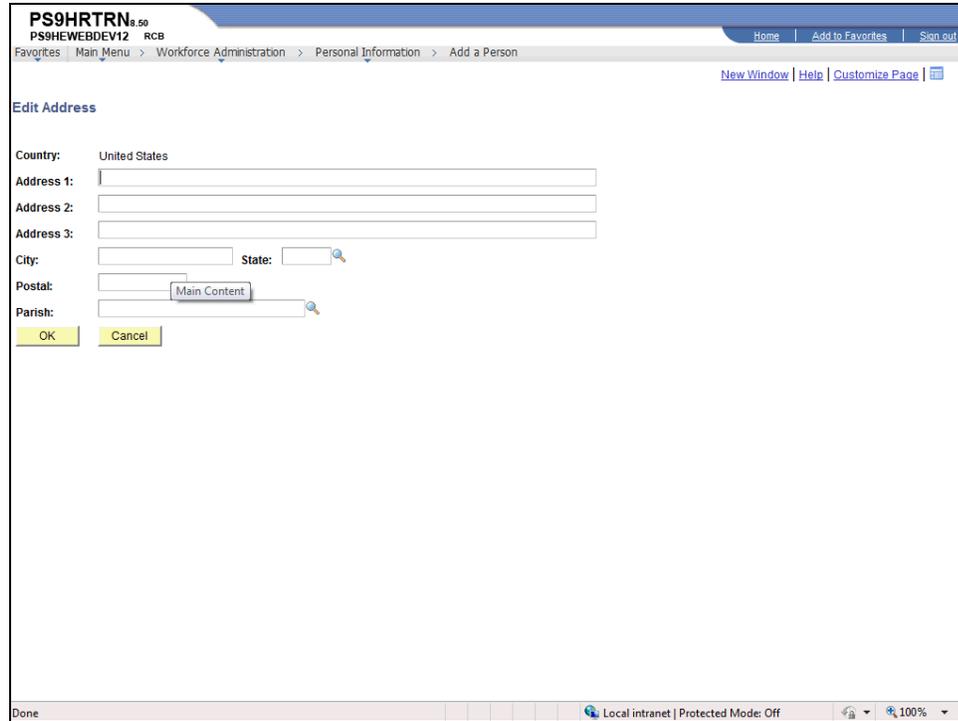
Step	Action
29.	Click the Married list item. 
30.	Click the button to the right of the Language Code field. 
31.	Click the English list item. 
32.	Enter the desired information into the National ID field. Enter " 9-digit Social Security Number ".
33.	<i>NOTE: If the National ID field is left blank during 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").</i>
34.	<i>NOTE: Verify that the Primary ID box to the right of the National ID field is checked.</i>
35.	Click the Contact Information tab. 

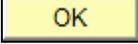


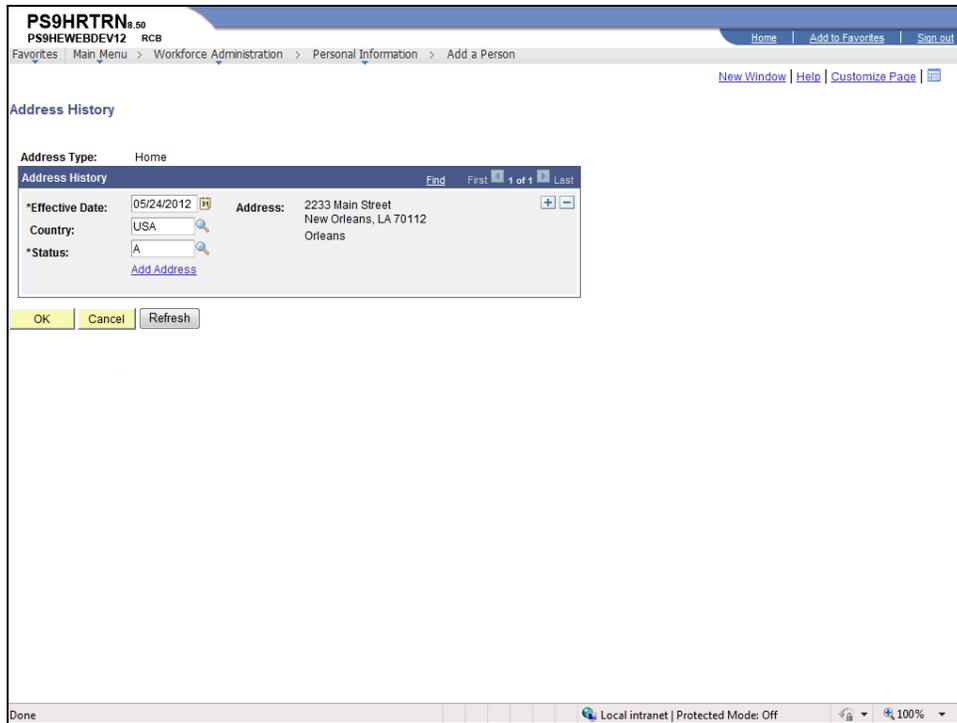
Step	Action
36.	Click the Add Address Detail link. 

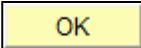


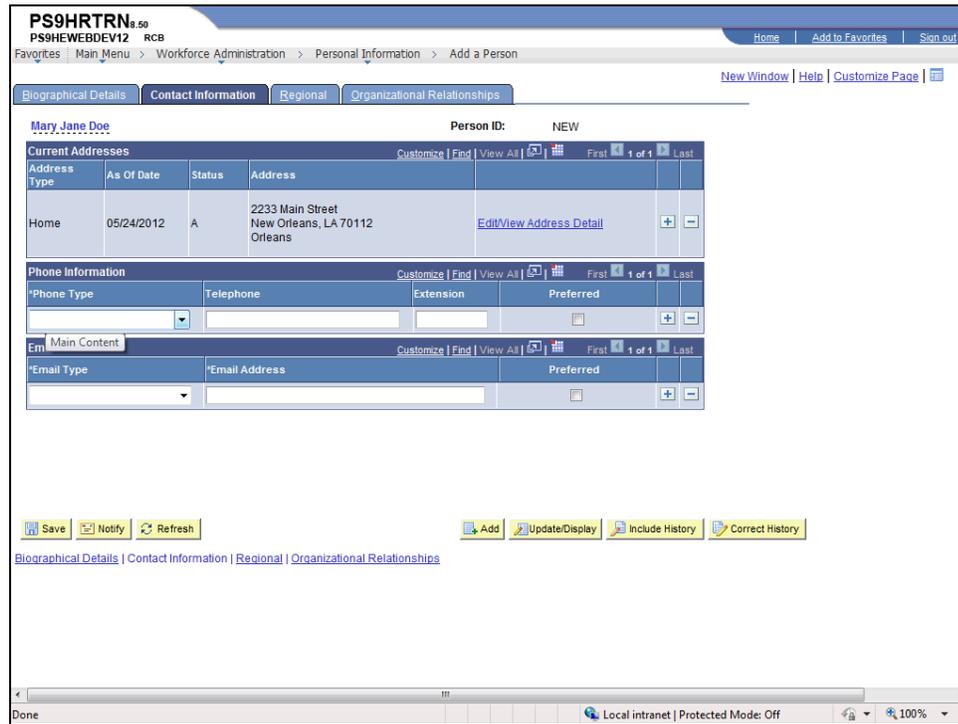
Step	Action
37.	Click the Add Address link. Add Address

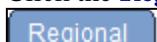


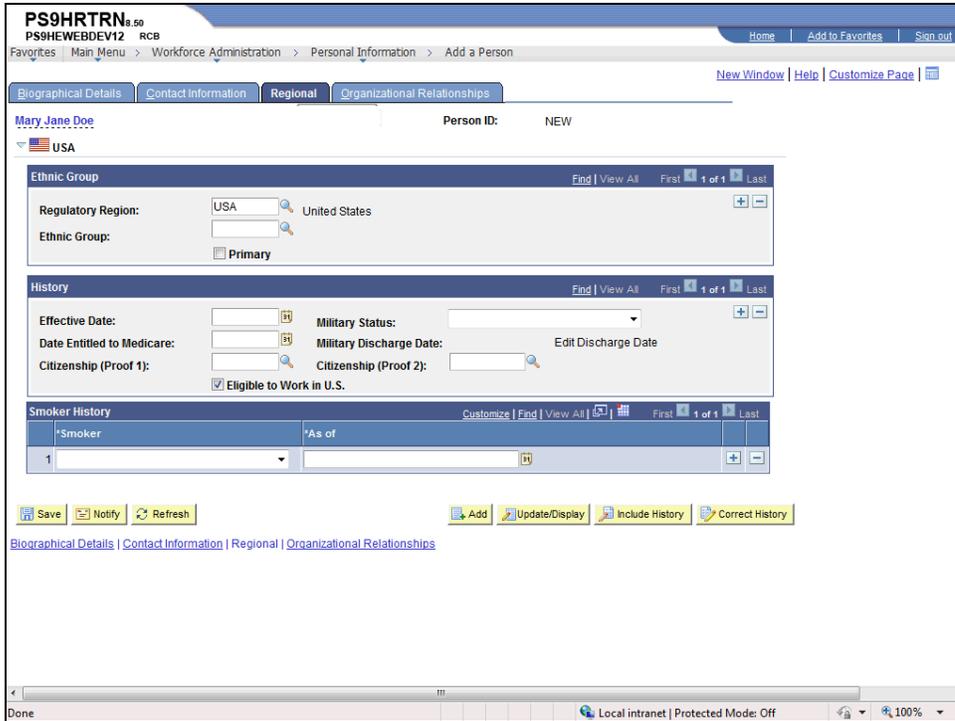
Step	Action
38.	Enter the desired information into the Address 1 field. Enter " 2233 Main Street ". <i>NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P. O. Box information, etc.</i>
39.	Enter the desired information into the City field. Enter " 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. 
46.	Click the OK button. 

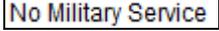


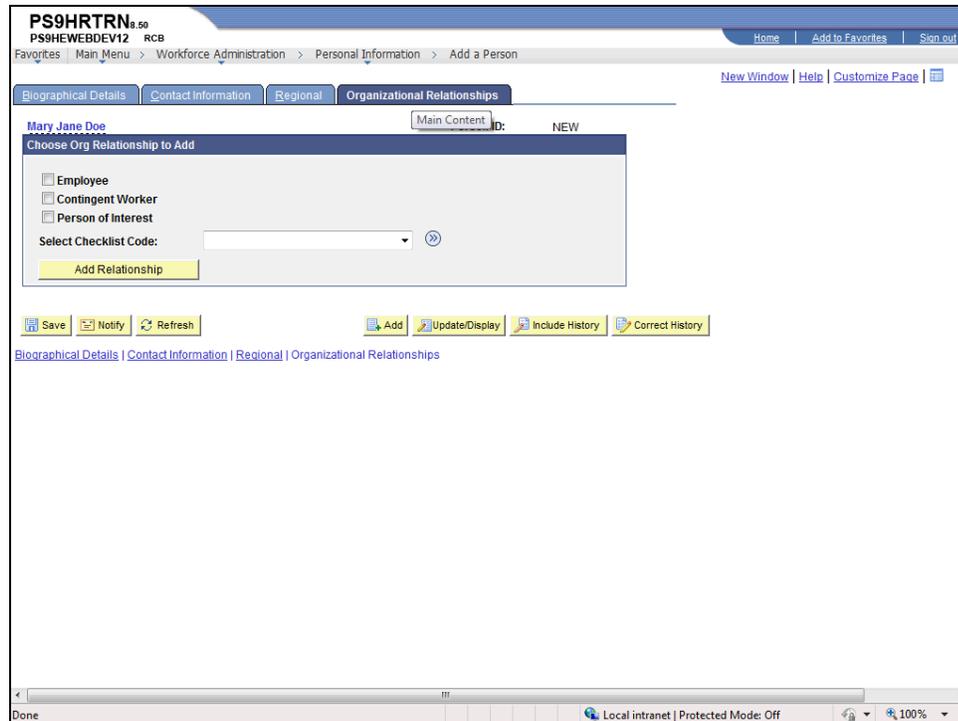
Step	Action
47.	Click the OK button. 



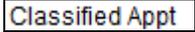
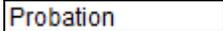
Step	Action
48.	Click the button to the right of the Phone Type field. 
49.	Click the Home list item. 
50.	Enter the desired information into the Telephone field. Enter " 5042221515 ".
51.	Click the Preferred option. 
52.	Click the button to the right of the Email Type field. 
53.	Click the Home list item. 
54.	Enter the desired information into the Email Address field. Enter " mjdoe@hotmail.com ".
55.	Click the Preferred option. 
56.	Click the Regional tab. 



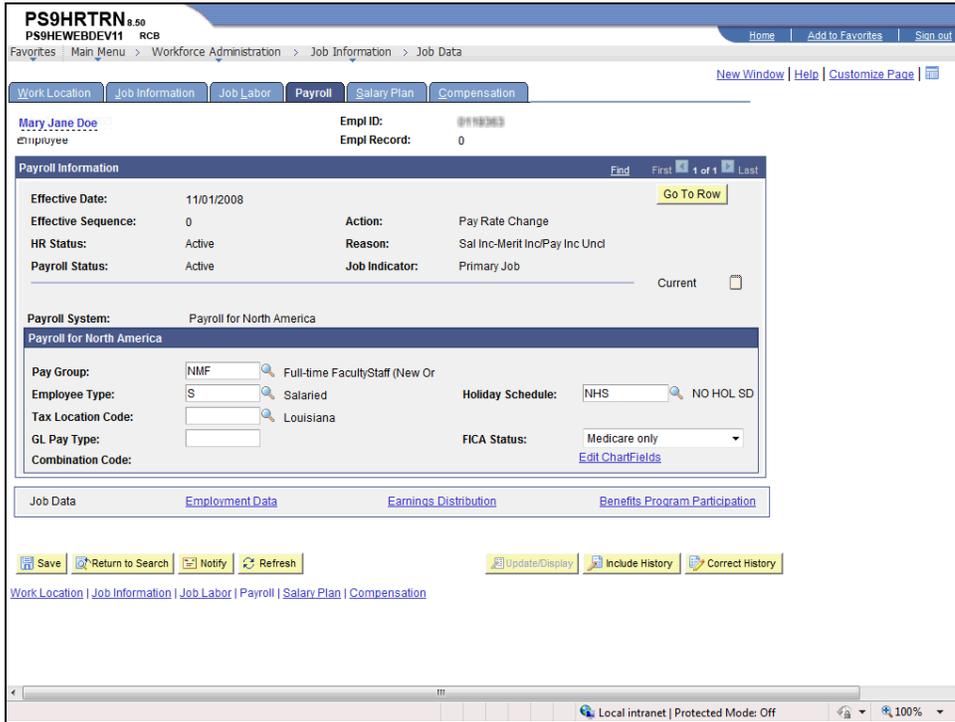
Step	Action
57.	Click the Look up Ethnic Group button. 
58.	Click the HISPA link. 
59.	Click the Primary option. 
60.	Click the button to the right of the Military Status field. 
61.	Click the No Military Service list item. 
62.	Click the Organizational Relationships tab. 



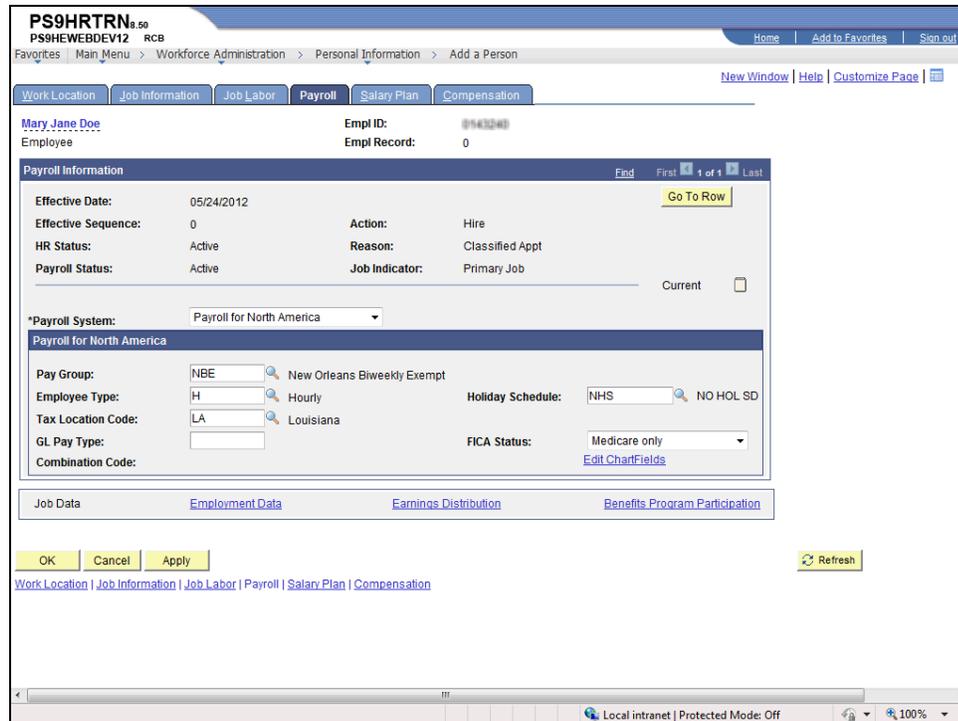
Step	Action
63.	Click the Employee option. 
64.	Click the Add Relationship button. <i>NOTE: Once you click the Add the Relationship button, the system will automatically assign the employee an ID number.</i> 
65.	The employee's ID number displays at the top of the page. <i>WARNING: Make sure you note 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.</i>
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>

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 ". <i>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.</i>
70.	<i>NOTE: It is important to verify that each field is accurately populated from manage position.</i>
71.	Click the Job Information tab. 
72.	Click the button to the right of the Empl Class field. 
73.	Click the Probation list item. 

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



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



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. 
85.	Click the Compensation tab and then scroll to the bottom of the page. 

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

Comparative Information

Change Amount: 0.000000 USD Hourly
Change Percent: 0.000 Compa-Ratio: 1.00

Pay Rates

Annual	37,440.000000	USD	Daily	144.000000	USD
Monthly	3,120.000000	USD	Hourly	18.000000	USD

Default Pay Components

Pay Components

Amounts | Controls | Changes | Conversion | (Test) | Customize | Find | First | 1 of 1 | Last

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	18.000000	USD	H	

Calculate Compensation

Time and Labor Pay Rules

Begin Date: 05/24/2012 Time & Labor Status: Enrolled and Active

Pay from Sched: Inactivate/Do Not Enroll:

Meals: OverTime: 40 OVERTIME 1.0/1.5

Shift 2: WeekEnd:

Shift 3: CallBack: CALL BACK CASH @ 1.0/1.5

Holiday Wrkd: Holiday Pay Worked

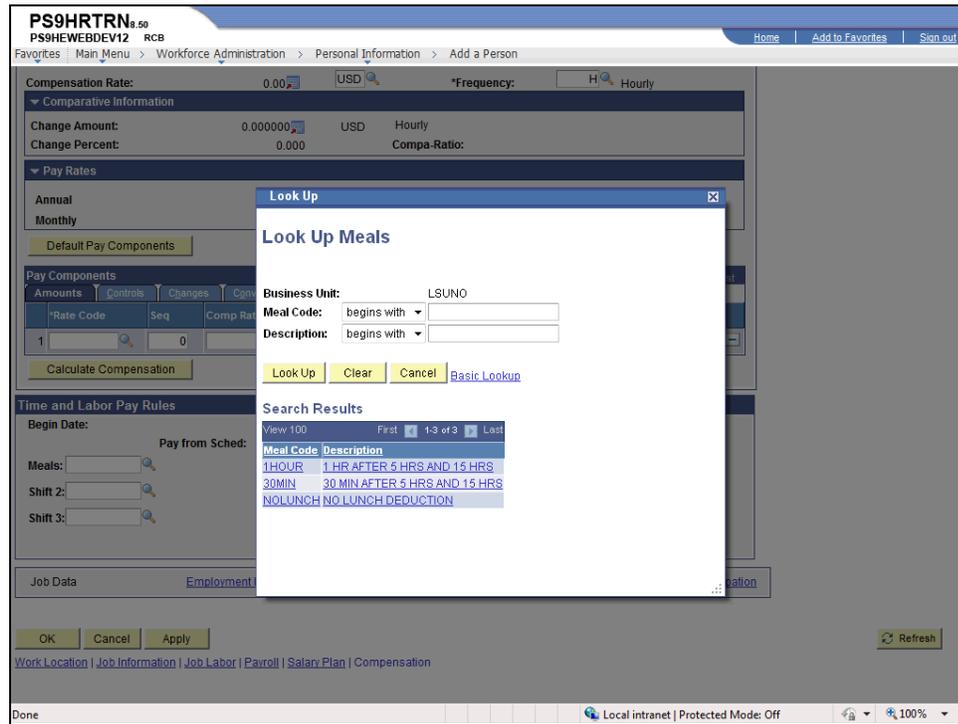
Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Local intranet | Protected Mode: Off | 100%

Step	Action
86.	Click the Look up Meals button. 



Step	Action
87.	Click the 30MIN link. 

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

Payroll Status: Active Job Indicator: Primary Job Current

Compensation Rate: 18.00 USD *Frequency: Hourly

▼ Comparative Information

Change Amount: 0.000000 USD Hourly
Change Percent: 0.000 Compa-Ratio: 1.00

▼ Pay Rates

Annual	37,440.000000	USD	Daily	144.000000	USD
Monthly	3,120.000000	USD	Hourly	18.000000	USD

Default Pay Components

Pay Components Customize | Find | First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	18.000000	USD	H	

Calculate Compensation

Time and Labor Pay Rules

Begin Date: 05/24/2012 Time & Labor Status: Enrolled and Active

Pay from Sched: Inactivate/Do Not Enroll:

Meals: 30MIN 30 MIN AFTER 5 HRS AND 15 HRS OverTime:

Shift 2: WeekEnd:

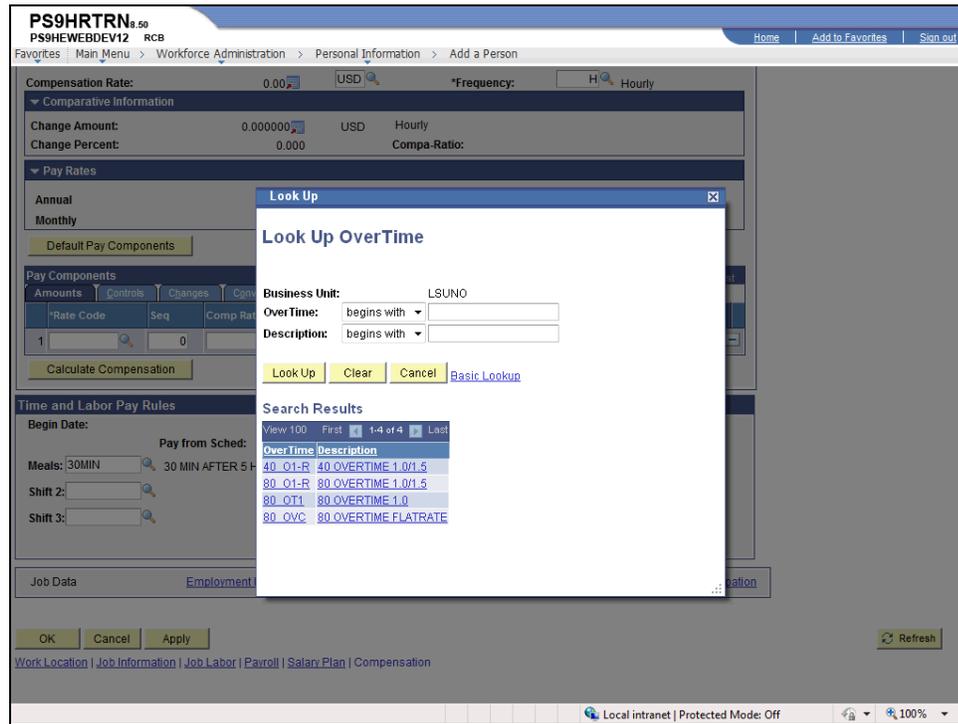
Shift 3: CallBack:

Holiday Wrkd:

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Done Local intranet | Protected Mode: Off 100%

Step	Action
88.	Click the Look up OverTime button. 



Step	Action
89.	Click the 40_O1-R link. 40_O1-R

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

Payroll Status: Active Job Indicator: Primary Job Current

Compensation Rate: 18.00 USD *Frequency: Hourly

▼ Comparative Information

Change Amount:	0.000000	USD	Hourly
Change Percent:	0.000	Compa-Ratio:	1.00

▼ Pay Rates

Annual	37,440.000000	USD	Daily	144.000000	USD
Monthly	3,120.000000	USD	Hourly	18.000000	USD

Default Pay Components

Pay Components

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	18.000000	USD	H	

Calculate Compensation

Time and Labor Pay Rules

Begin Date: 05/24/2012 Time & Labor Status: Enrolled and Active

Pay from Sched: Inactivate/Do Not Enroll:

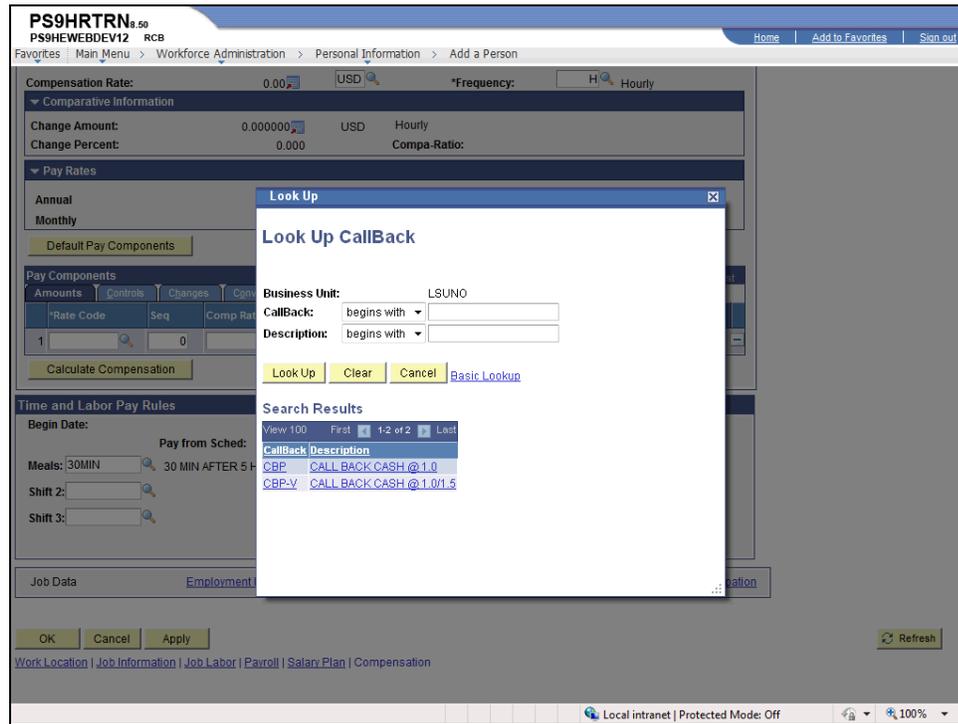
Meals: 30MIN 30 MIN AFTER 5 HRS AND 15 HRS OverTime: 40_O1-R 40 OVERTIME 1.0/1.5

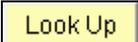
Shift 2: WeekEnd:
Shift 3: CallBack:
Holiday Wrkd:

Job Data Employment Data Earnings Distribution Benefits Program Participation

Local intranet | Protected Mode: Off 100%

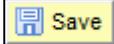
Step	Action
90.	Click the Look up Callback button. 

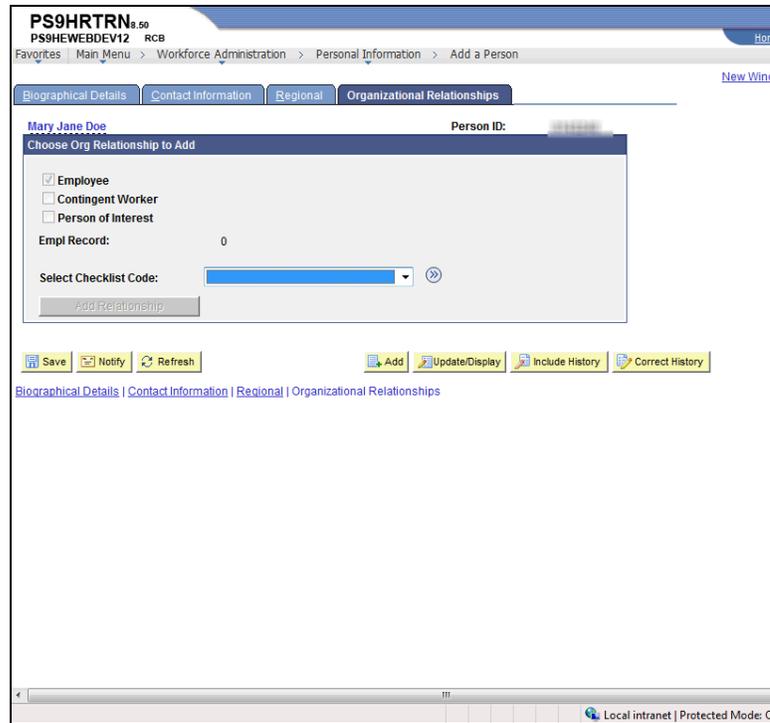


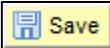
Step	Action
91.	Click the CBP-V link. 
92.	Click the Look up Holiday Wrkd button. 
93.	Click the HPW-HOL link. 
94.	Click the Look up Rate Code button. 
95.	Enter the desired information into the Comp Rate Code field. Enter " N ".
96.	Click the Look Up button. 
97.	Click the NAHRLY link. 
98.	Enter the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

Step	Action
101.	<p>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.</p> <p>In this example the hire date and effective date are the same so the date does not need to be adjusted.</p>
102.	<p>Click the Look up Benefit Program button.</p> 
103.	<p>Click the FTP link.</p> 

The screenshot displays the 'PS9HRTN' system interface for an employee record. The 'Benefit Status' section shows: Benefit Record Number: 0, Effective Date: 05/24/2012, Effective Sequence: 0, HR Status: Active, Payroll Status: Active, Action: Hire, Reason: Classified Appt, Job Indicator: Primary Job. The 'Benefits System' is set to 'Base Benefits' with an 'Annual Benefits Base Rate' field and 'USD' currency. The 'Benefits Administration Eligibility' section contains fields for BAS Group ID and Elig Fld 1 through 9. The 'Benefit Program Participation' section shows: *Effective Date: 05/24/2012, Currency Code: USD, *Benefit Program: FTP, Full/Temp/Part-time. Navigation buttons include Save, Return to Search, Notify, Refresh, Update/Display, Include History, and Correct History.

Step	Action
104.	<p>Click the Save button.</p> 



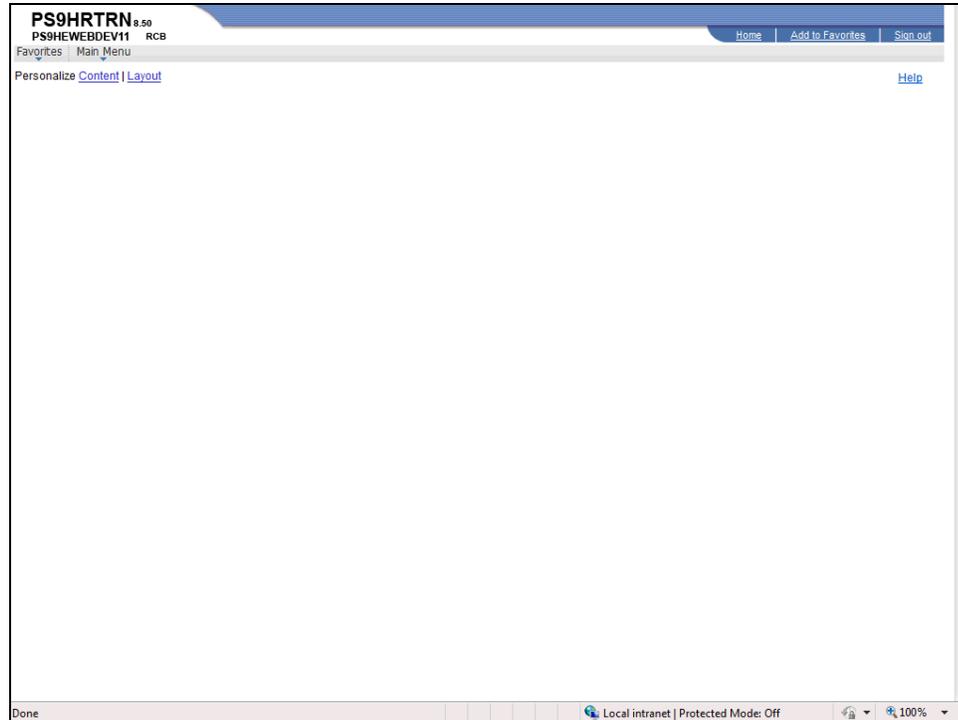
Step	Action
105.	Click the Save button. 
106.	This completes <i>Add a Person - Classified</i> . End of Procedure.

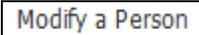
Add a Person - Unclassified

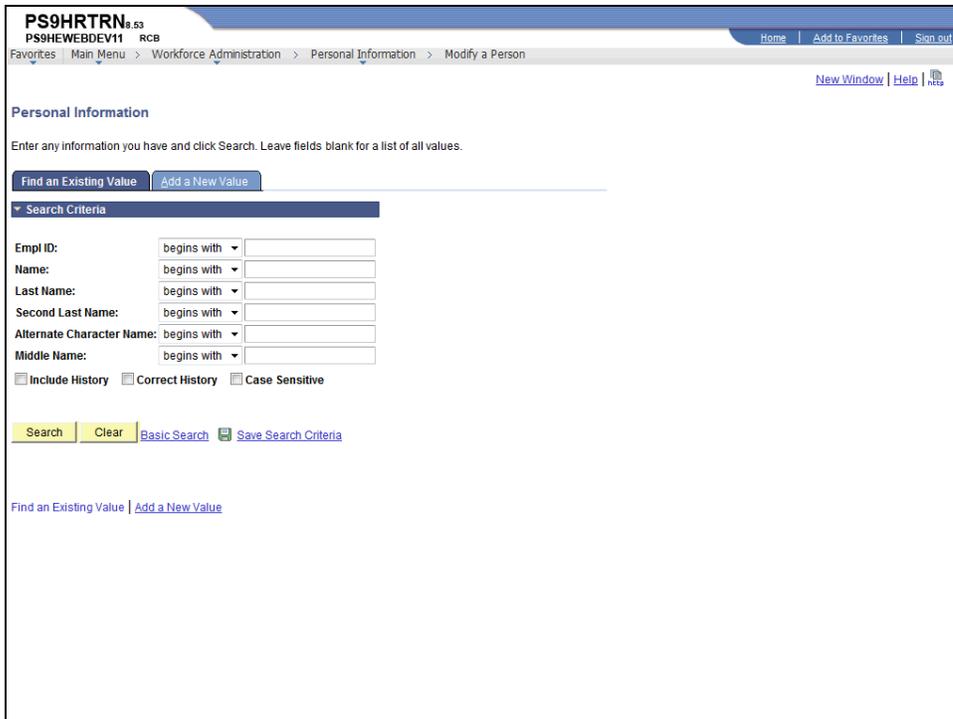
Procedure

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.



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



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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person

[New Window](#) | [Help](#) | 

Personal Information

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](#)

▼ Search Criteria

Empl ID: begins with

Name: begins with

Last Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

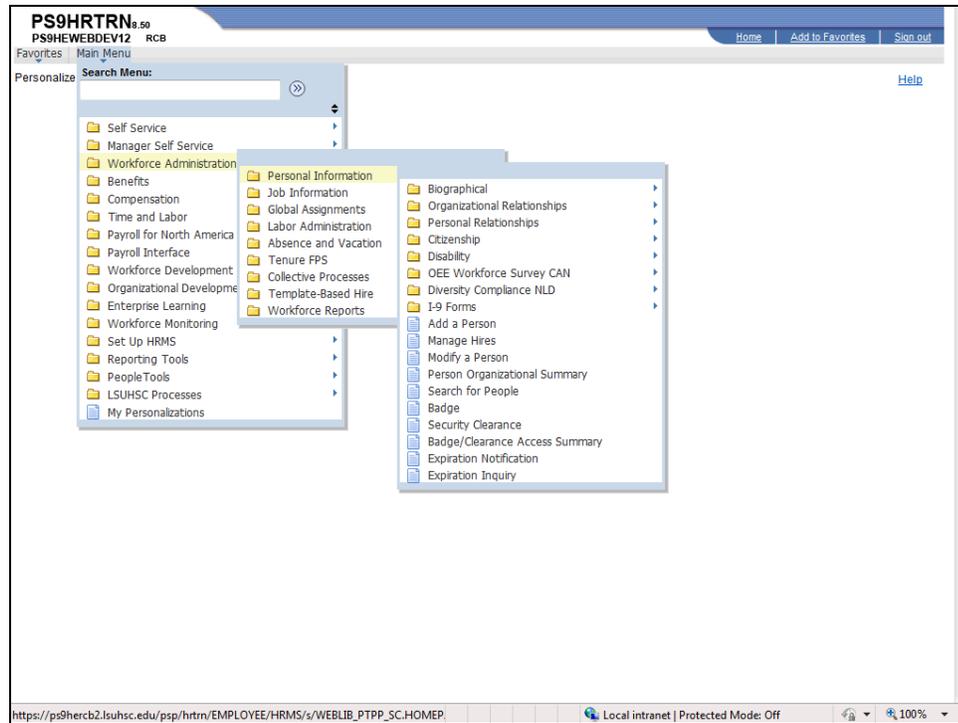
Middle Name: begins with

Include History Correct History Case Sensitive

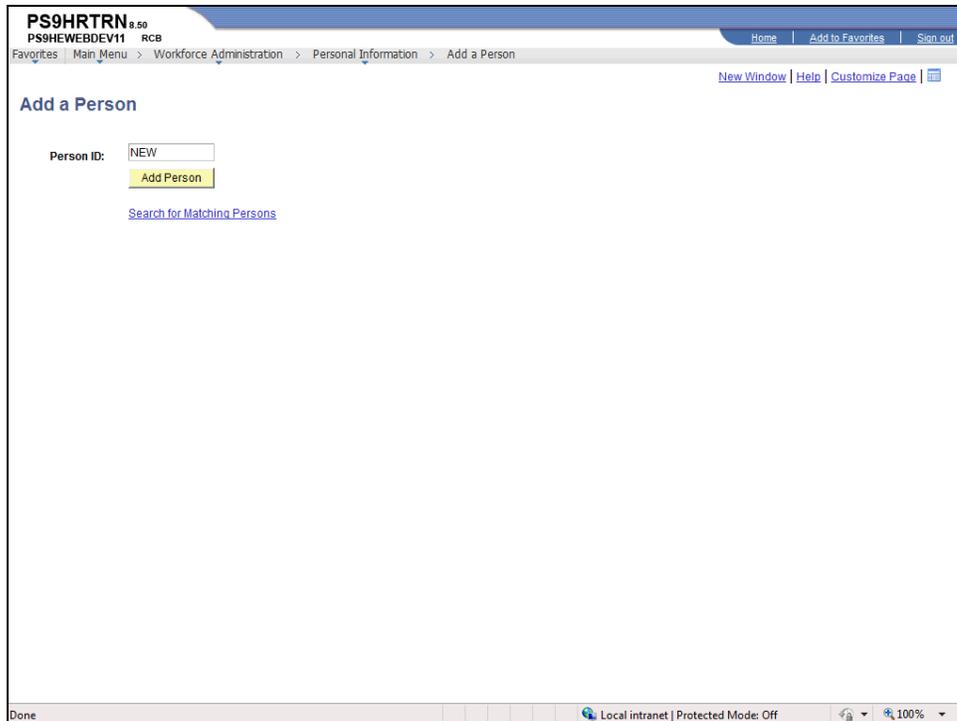
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

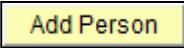
[Find an Existing Value](#) | [Add a New Value](#)

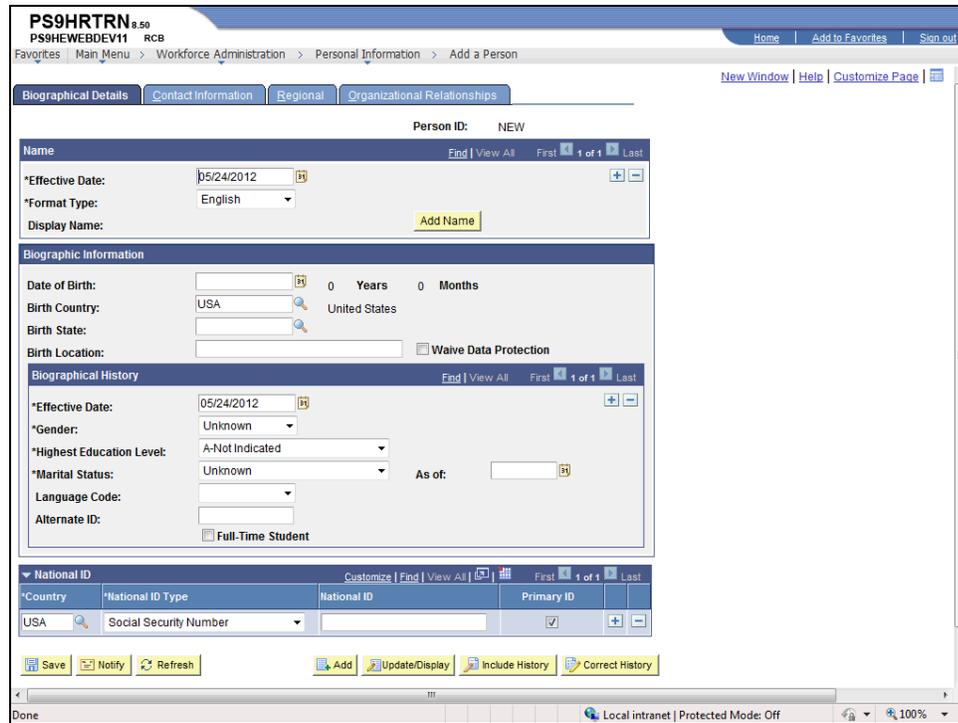
Step	Action
5.	Enter the desired information into the Last Name field. Enter " Doe ".
6.	Click the Search button. 
7.	<p>NOTE: <i>If there is a data match on the search criteria, check the Date of Birth and National ID fields to <u>make sure you are not inputting a duplicate person into the system.</u></i></p> <p><i>If this person <u>does not exist</u> in the system, proceed to the next step to create a new person.</i></p> <p><i>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 Change</u> topic for instructions on modifying a person's data.</i></p>



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



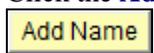
Step	Action
9.	Click the Add the Person link. 
10.	<i>NOTE: The Effective Date defaults as the current date. Depending on when you are entering the employee's information, you may need to change the Effective Date.</i>

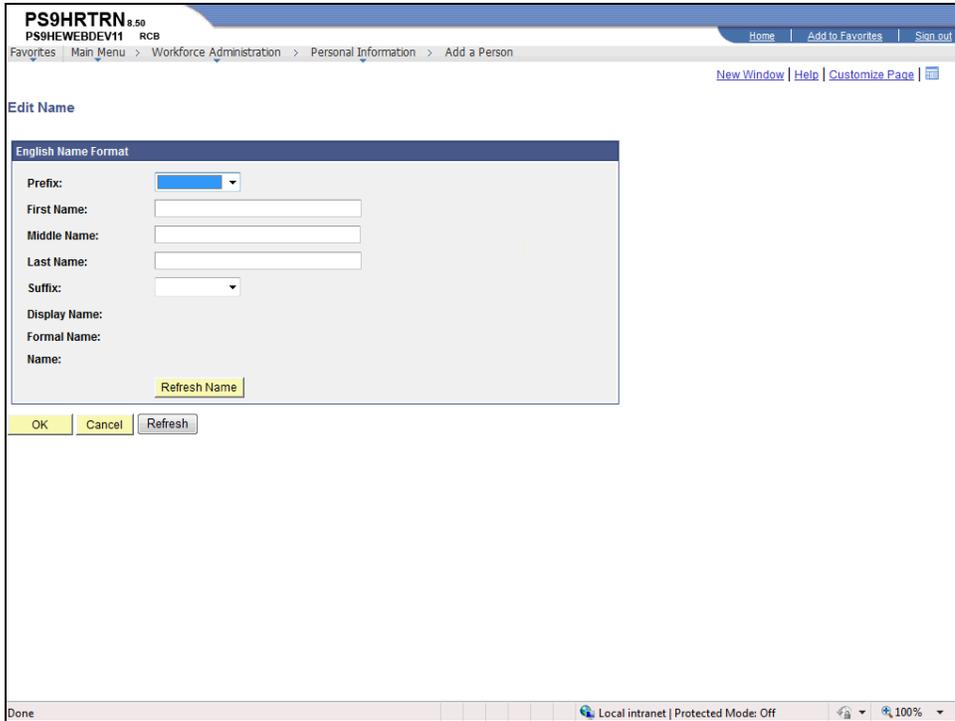


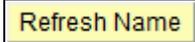
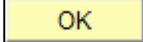
The screenshot shows the 'Add a Person' form in the PS9HRTRN 8.50 application. The form is divided into several sections:

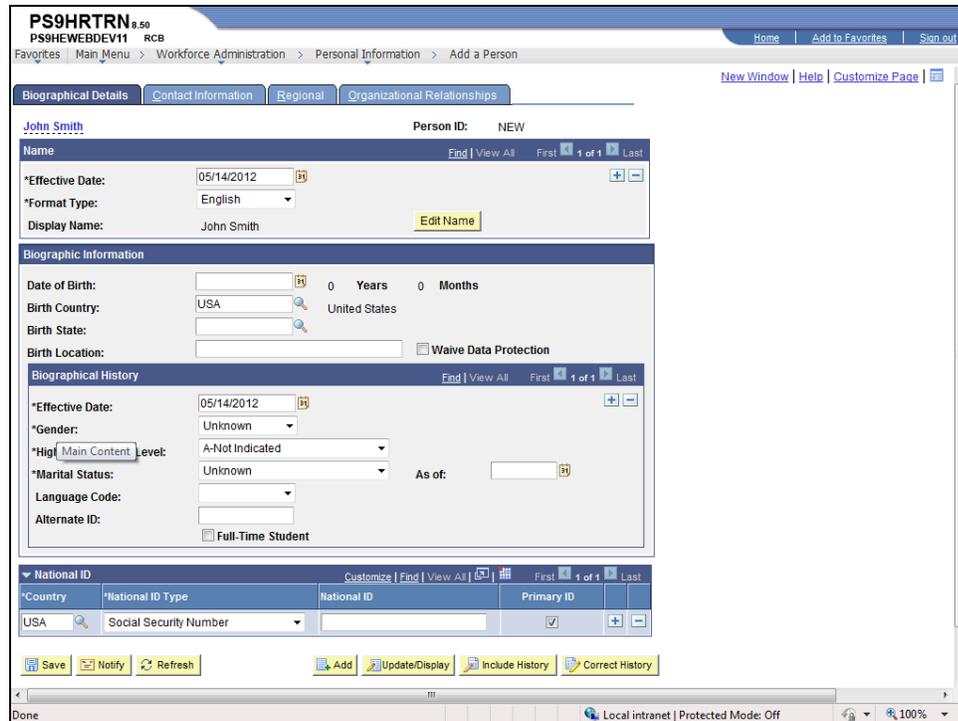
- Name:** Includes fields for *Effective Date (05/24/2012), *Format Type (English), and Display Name. An 'Add Name' button is present.
- Biographic Information:** Includes fields for Date of Birth, Birth Country (USA), Birth State, and Birth Location. A 'Waive Data Protection' checkbox is also visible.
- Biographical History:** Includes fields for *Effective Date (05/24/2012), *Gender (Unknown), *Highest Education Level (A-Not Indicated), *Marital Status (Unknown), Language Code, and Alternate ID. A 'Full-Time Student' checkbox is at the bottom.
- National ID:** A table with columns for *Country, *National ID Type, National ID, and Primary ID. The current entry shows USA, Social Security Number, and a checked Primary ID.

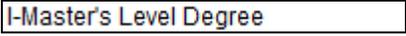
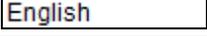
 At the bottom of the form, there are buttons for Save, Notify, Refresh, Add, Update/Display, Include History, and Correct History. The browser status bar at the bottom indicates 'Local intranet | Protected Mode: Off' and a zoom level of 100%.

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

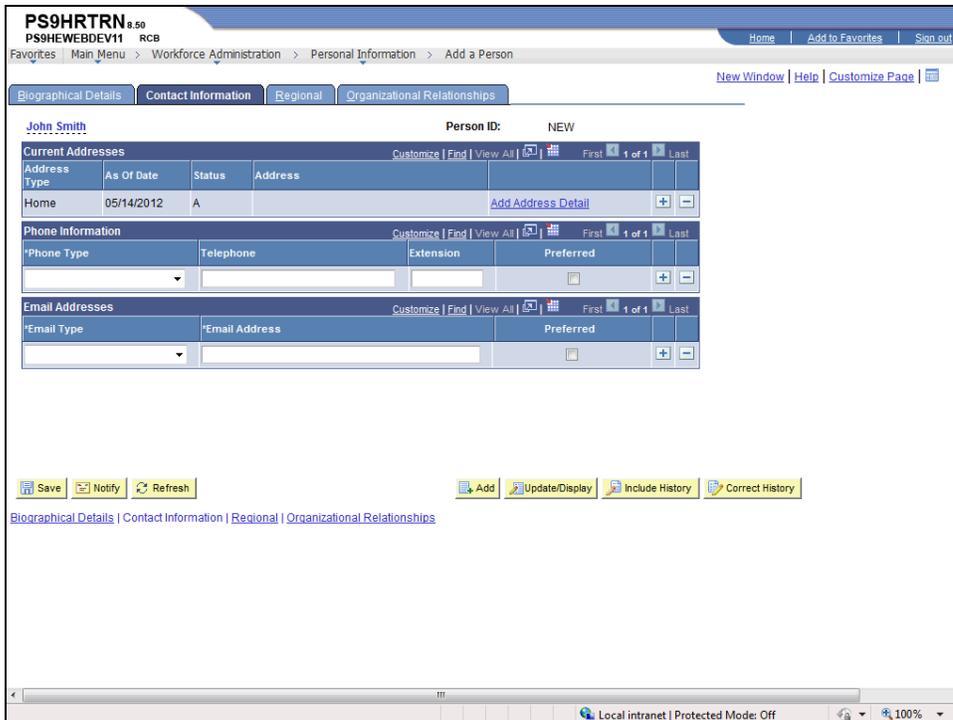


Step	Action
14.	Click the button to the right of the Prefix field. 
15.	Click the Mr list item. 
16.	Enter the desired information into the First Name field. Enter " John ".
17.	Enter the desired information into the Last Name field. Enter " Smith ".
18.	Click the Refresh Name button. 
19.	Click the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

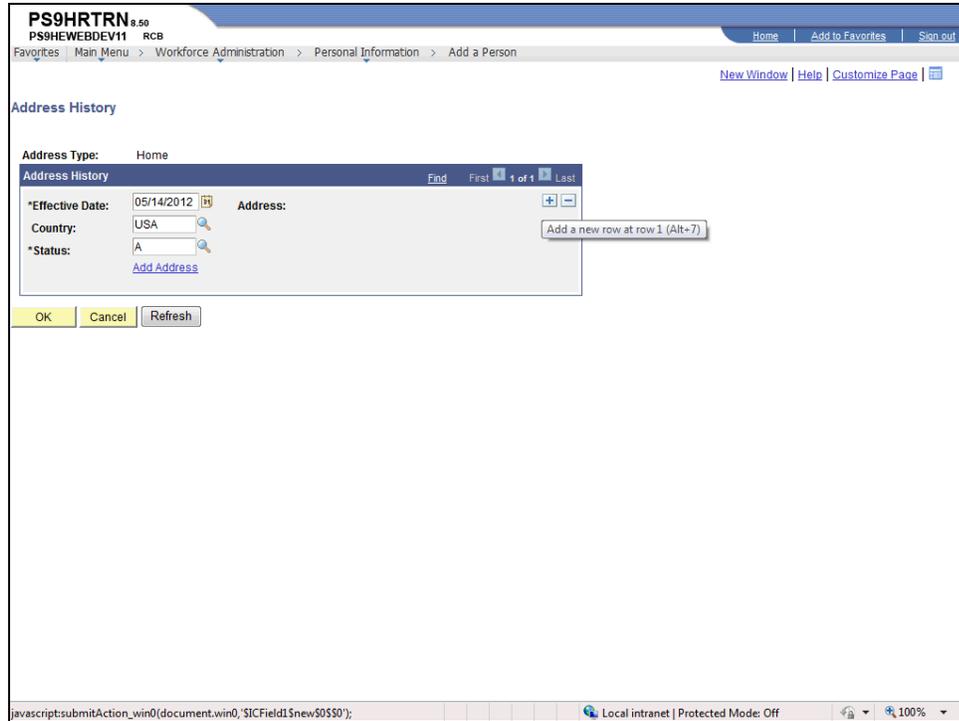


Step	Action
20.	Enter the desired information into the Date of Birth field. Enter " 010173 ".
21.	Enter the desired information into the Birth State field. Enter " LA ".
22.	Enter the desired information into the Birth Location field. Enter " Baton Rouge ".
23.	Click the button to the right of the Gender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

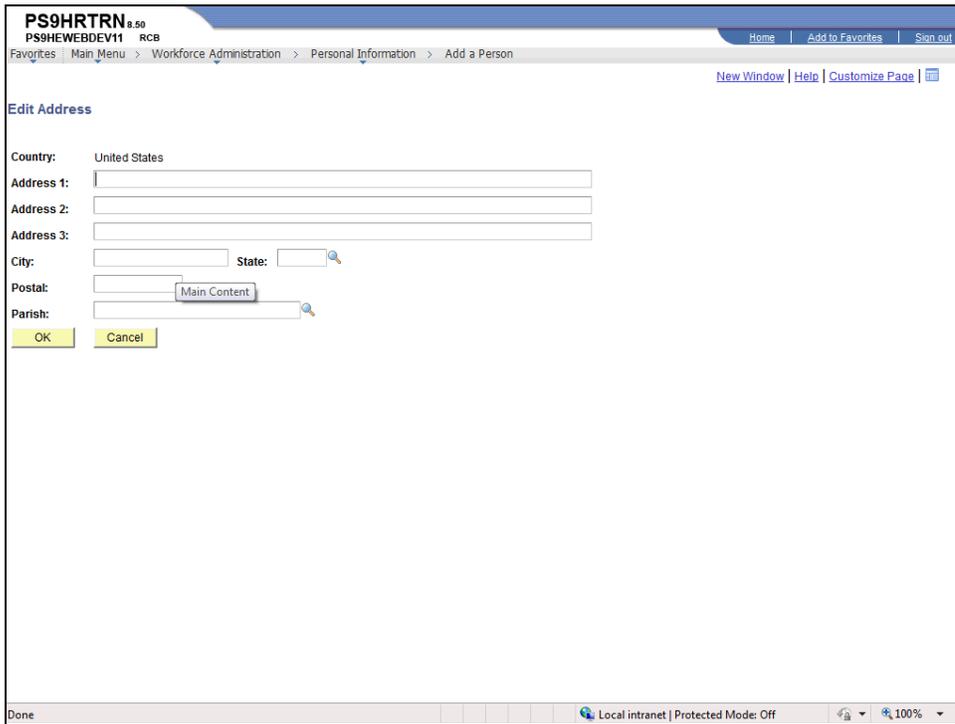
Step	Action
31.	Enter the desired information into the National ID field. Enter " 9-digit Social Security Number ".
32.	<i>NOTE: If the National ID field is left blank during hire, when a change is made to another field on the panel in Correction mode and then Saved, the text "Applied For" displays in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

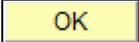


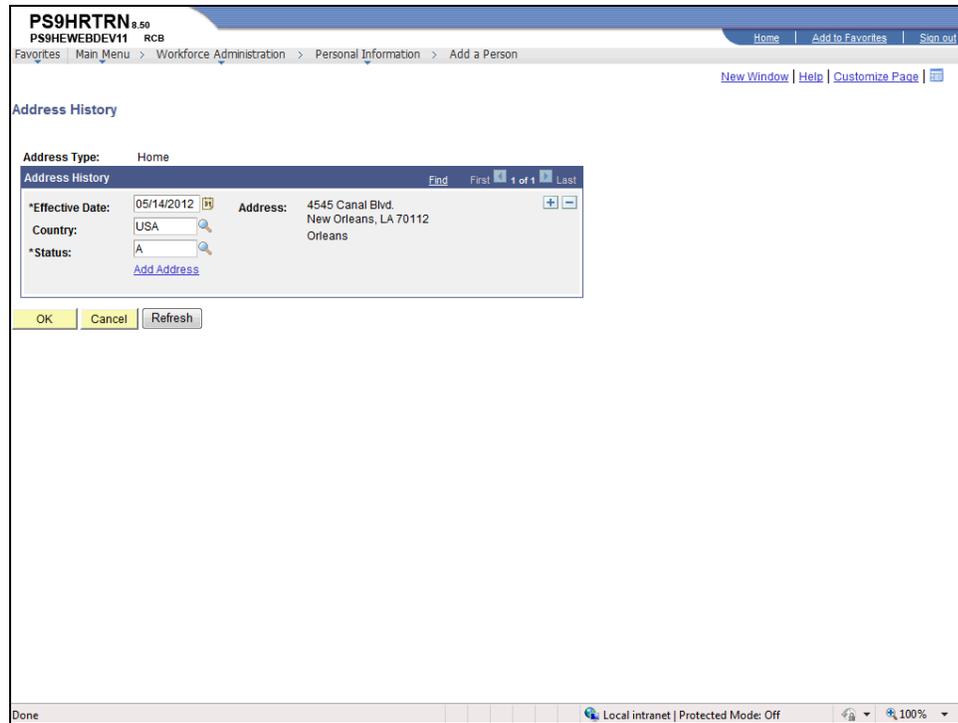
Step	Action
35.	Click the Add Address Detail link. 



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



Step	Action
37.	Enter the desired information into the Address 1 field. Enter " 4545 Canal Blvd. ". <i>NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P.O. Box numbers, etc.</i>
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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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Add a Person

[New Window](#) | [Help](#) | [Customize Page](#) | 

Address History

Address Type: Home

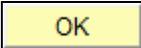
Address History Find First 1 of 1 Last

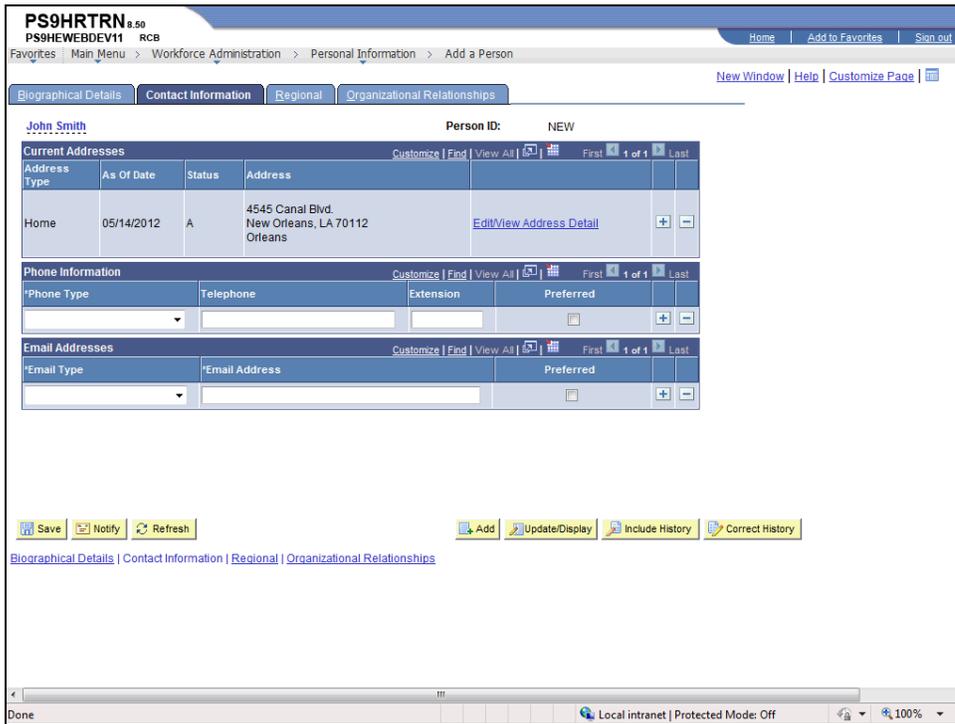
*Effective Date:	05/14/2012 	Address:	4545 Canal Blvd. New Orleans, LA 70112 Orleans	 
Country:	USA 			
*Status:	A 			

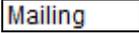
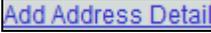
[Add Address](#)

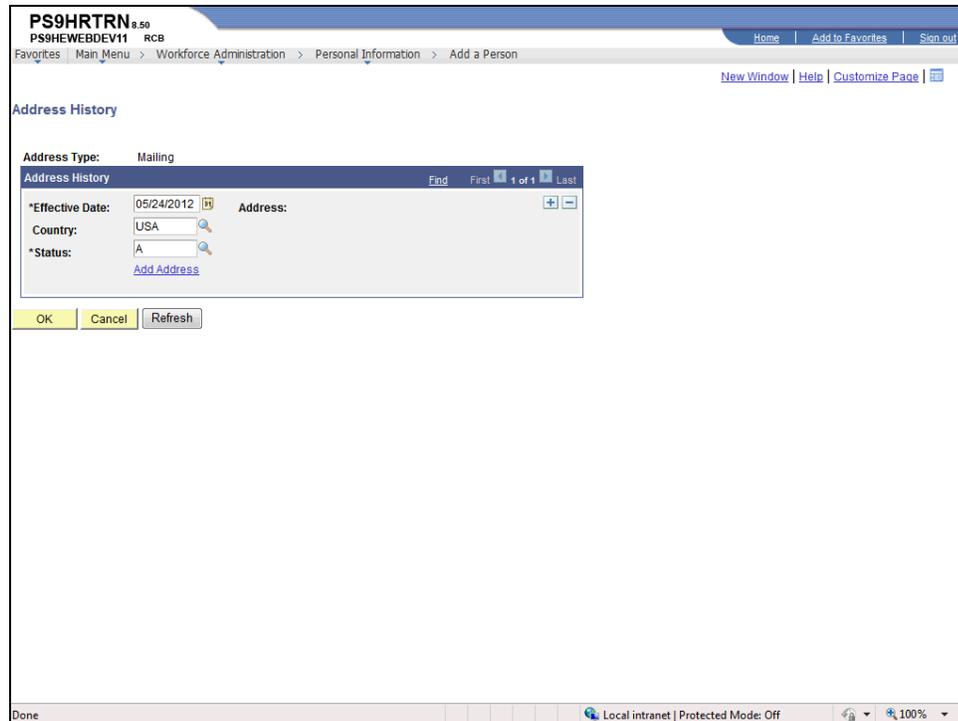
OK Cancel Refresh

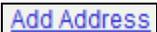
Done Local intranet | Protected Mode: Off  100%

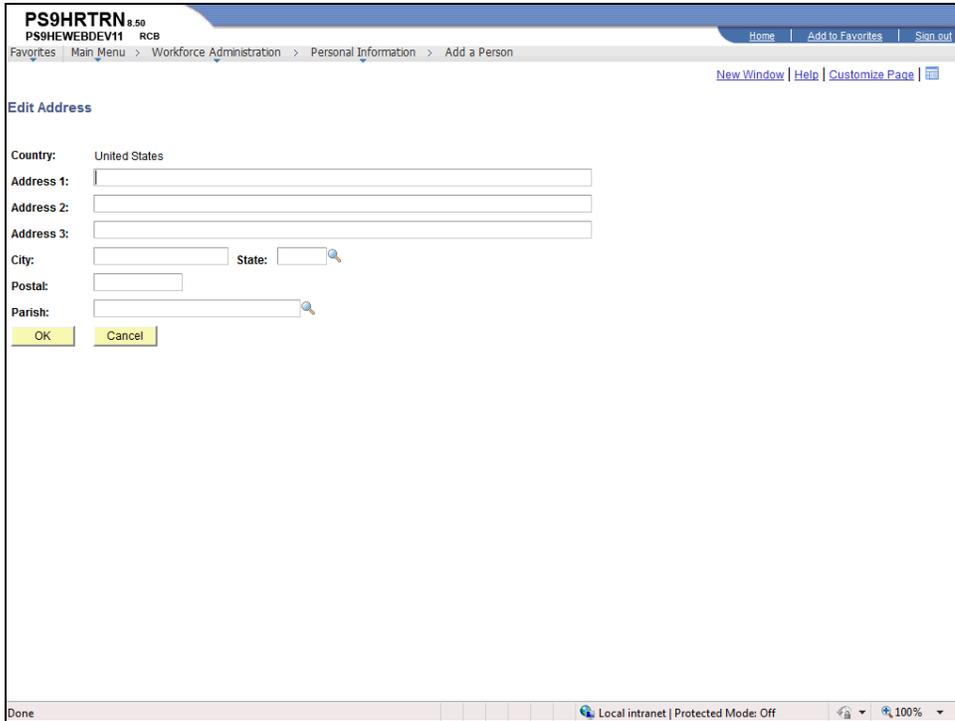
Step	Action
43.	Click the OK button. 



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. 
47.	Click the Add Address Detail link. 



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. 



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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Add a Person

[New Window](#) | [Help](#) | [Customize Page](#) | 

Edit Address

Country: United States

Address 1:

Address 2:

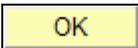
Address 3:

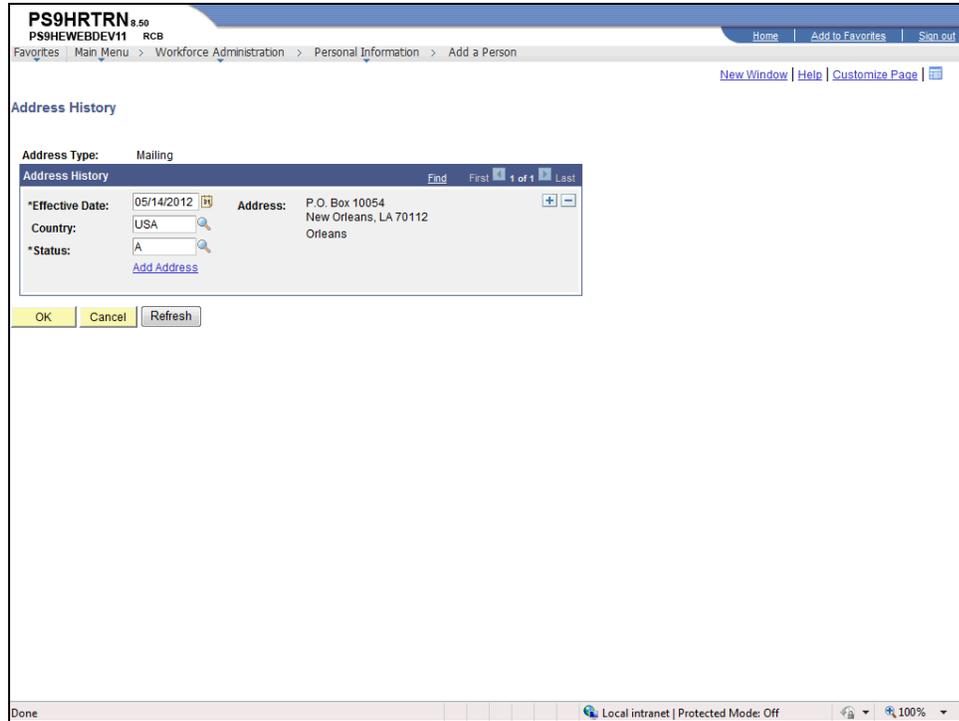
City: State: 

Postal:

Parish: 

Done Local intranet | Protected Mode: Off   100%

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. 



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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Add a Person

[New Window](#) | [Help](#) | [Customize Page](#) | 

Address History

Address Type: Mailing

Address History Find First 1 of 1 Last

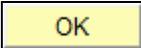
*Effective Date: 05/14/2012 [X] Address: P.O. Box 10054
New Orleans, LA 70112
Orleans

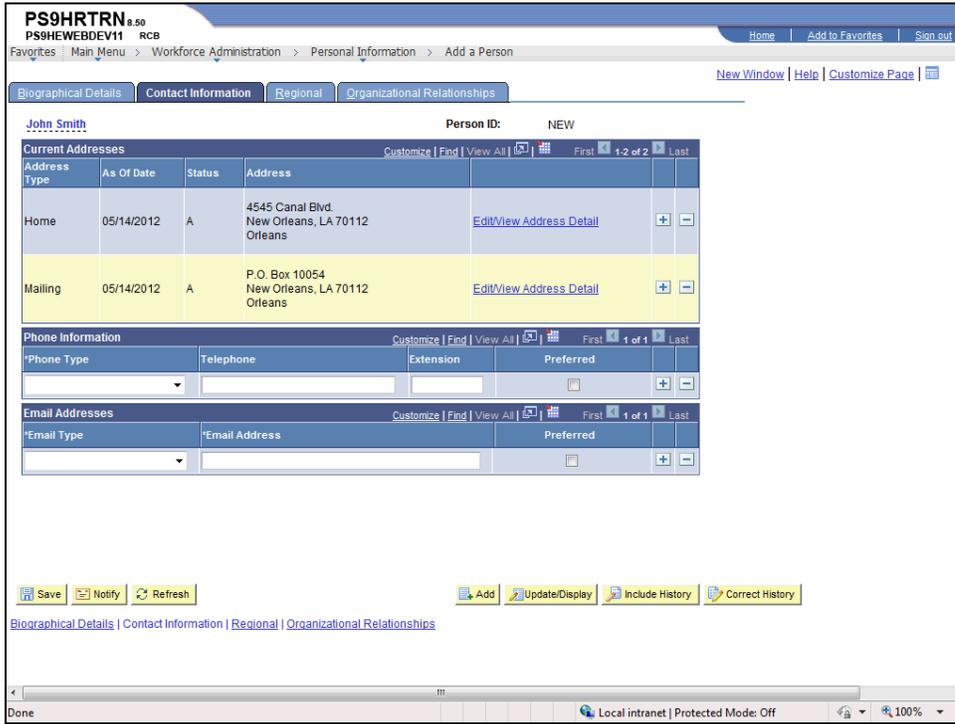
Country: USA [X] Add Address

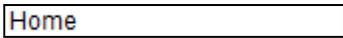
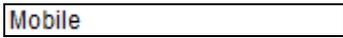
*Status: A [X]

OK Cancel Refresh

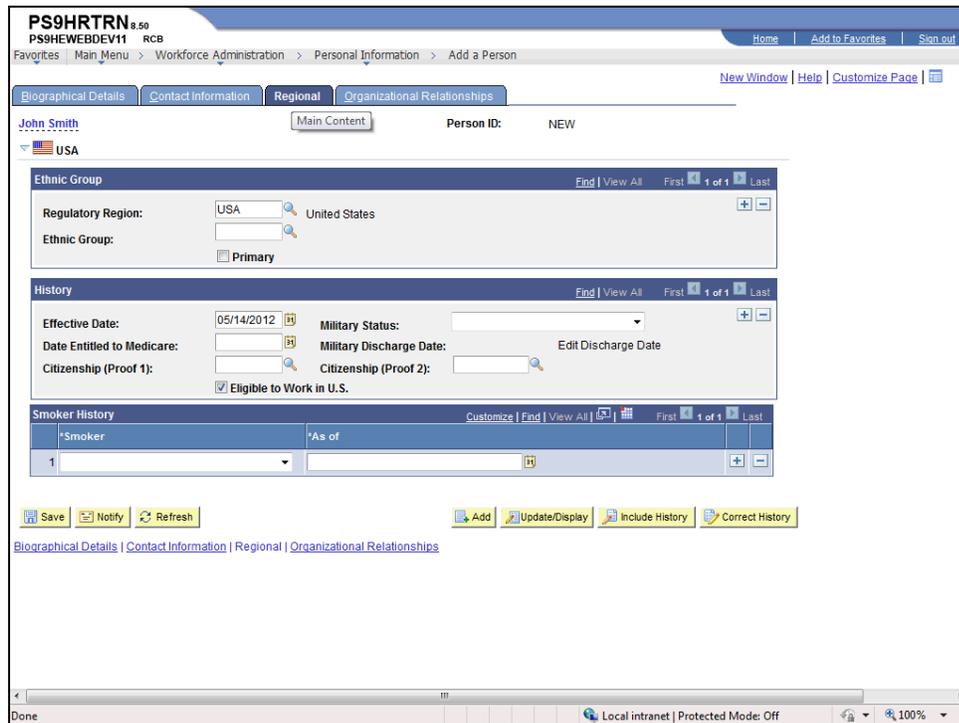
Done Local intranet | Protected Mode: Off 100%

Step	Action
57.	Click the OK button. 



Step	Action
58.	Click the Phone Type list. 
59.	Click the Home list item. 
60.	Enter the desired information into the Telephone field. Enter " 5045689999 ".
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. 
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. 

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. 



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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Add a Person

New Window | Help | Customize Page

Biographical Details | Contact Information | **Regional** | Organizational Relationships

John Smith Main Content Person ID: NEW

USA

Ethnic Group Find | View All | First 1 of 1 | Last

Regulatory Region: USA United States

Ethnic Group:

Primary

History Find | View All | First 1 of 1 | Last

Effective Date: 05/14/2012 Military Status: Military Discharge Date: Edit Discharge Date

Date Entitled to Medicare: Citizenship (Proof 1): Citizenship (Proof 2):

Eligible to Work in U.S.

Smoker History Customize | Find | View All | First 1 of 1 | Last

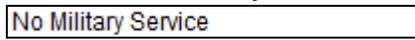
*Smoker *As of

1

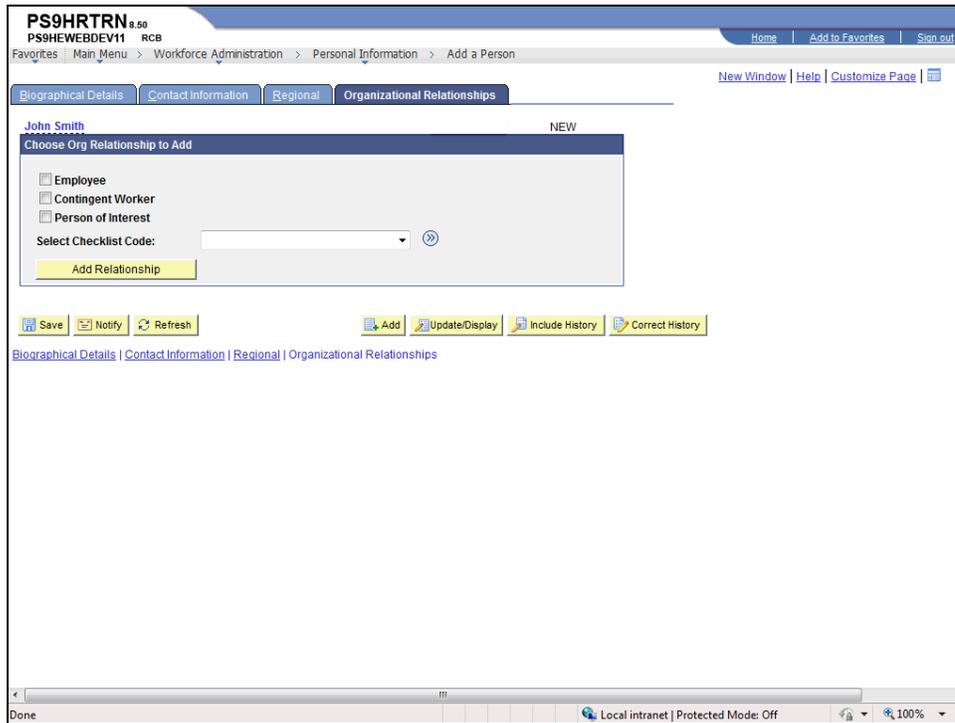
Save | Notify | Refresh | Add | Update/Display | Include History | Correct History

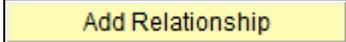
Biographical Details | Contact Information | Regional | Organizational Relationships

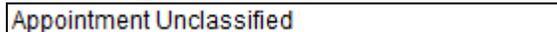
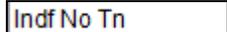
Done Local intranet | Protected Mode: Off 100%

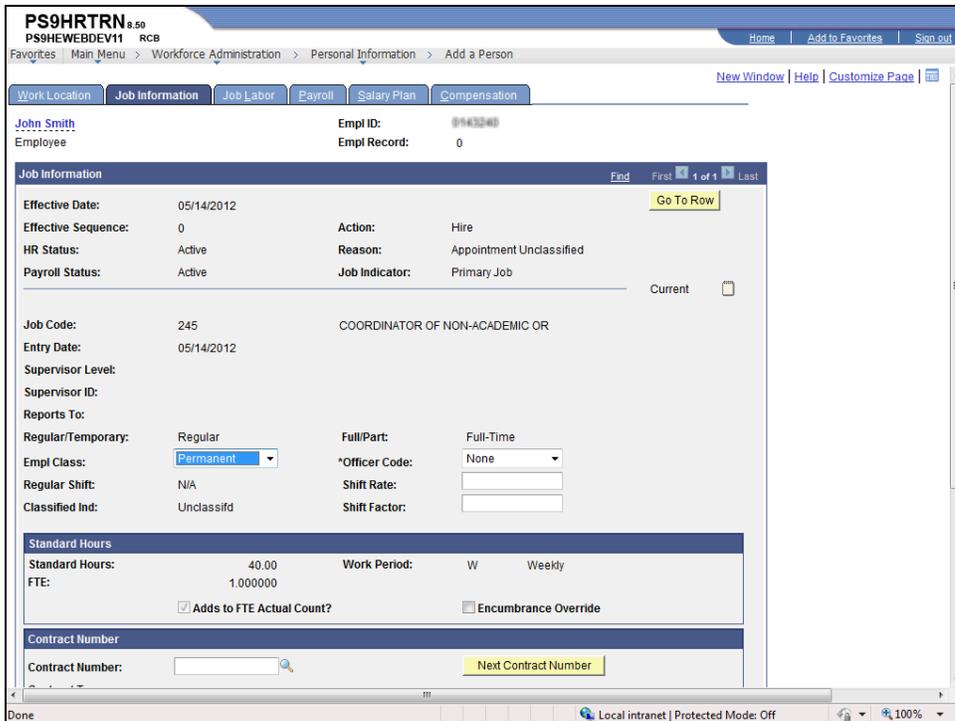
Step	Action
71.	Click the Look up Ethnic Group button. 
72.	Click the BLACK link. 
73.	Click the Primary option. 
74.	Click the button to the right of the Military Status field. 
75.	Click the No Military Service list item. 

Step	Action
76.	Click the Organizational Relationships tab. 

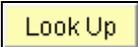
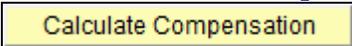
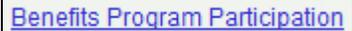
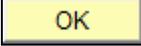
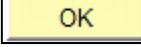


Step	Action
77.	Click the Employee option. 
78.	Click the Add Relationship button. 

Step	Action
79.	Click the button to the right of the Reason field. 
80.	Click the Appointment Unclassified list item. 
81.	Enter the desired information into the Position Number field. Enter " 00031354 ".
82.	NOTE: It is important to verify that each field is accurately populated from manage position.
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. 
86.	The Standard Hours information displays based on the employee's FTE. 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.



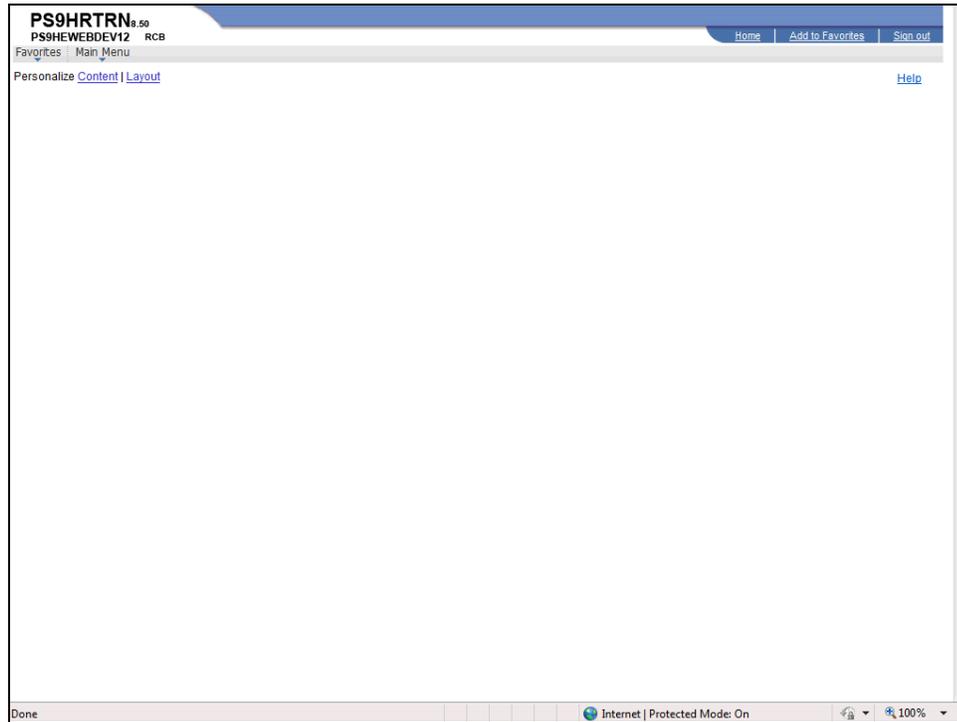
Step	Action
87.	Click the Payroll tab. 
88.	Click the Look up Pay Group button. 
89.	Click the Down button of the scrollbar. 
90.	Click the Full-time FacultyStaff (New Or) link. 
91.	The Employee Type is automatically populated into the field according to the Pay Group code selected. If the Employee 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.

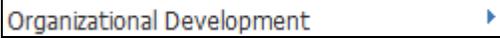
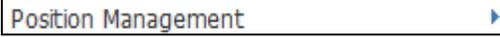
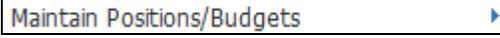
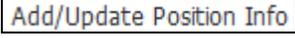
Step	Action
96.	Click the Compensation tab. 
97.	Click the Look up Rate Code button. 
98.	Enter the desired information into the Comp Rate Code field. Enter " N ".
99.	Click the Look Up button. 
100.	Click the NAMNTH link. 
101.	Enter the desired information into the Comp Rate field. Enter " 4000.00 ".
102.	Click the Calculate Compensation button. 
103.	Annual and Monthly compensation rates display in the Comparative Information and Pay Rates sections. Click the Benefits Program Participation link. 
104.	<i>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.</i>
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

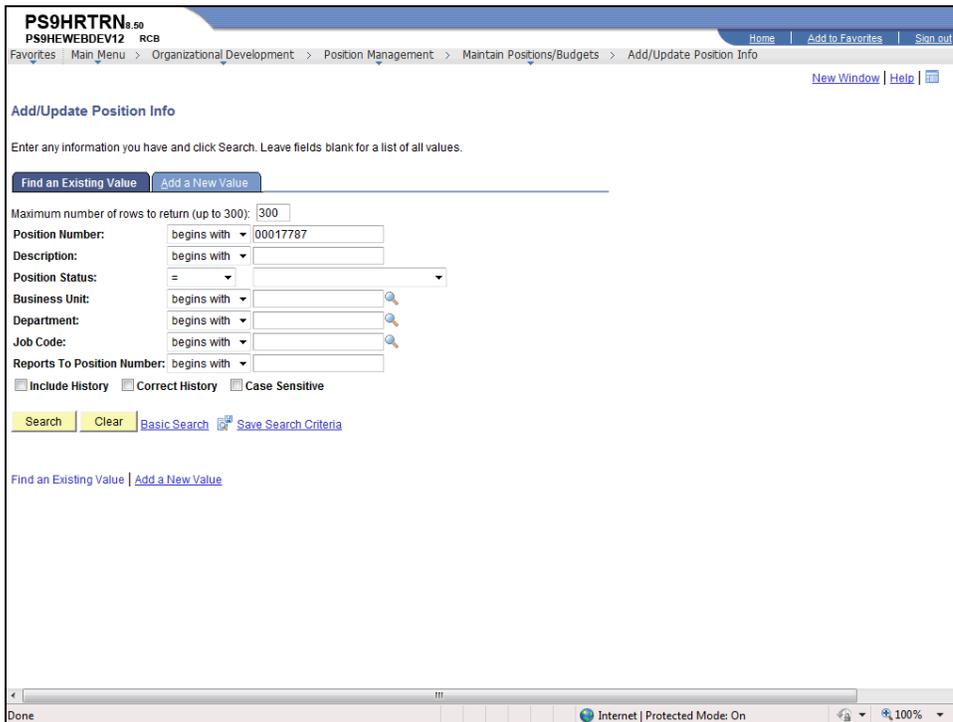
Procedure

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



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

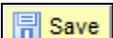
Step	Action
6.	<p>A Department Change must be recorded in two places within the system:</p> <ol style="list-style-type: none"> 1. The Description tab in Add/Update Position Info and 2. The Work Location tab in Job Data. <p>NOTE: Changes must first be added to the Description tab in Add/Update Position Info.</p>
7.	<p>In this exercise the employee will change departments from NO1651200 to NO1651300.</p>

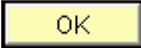


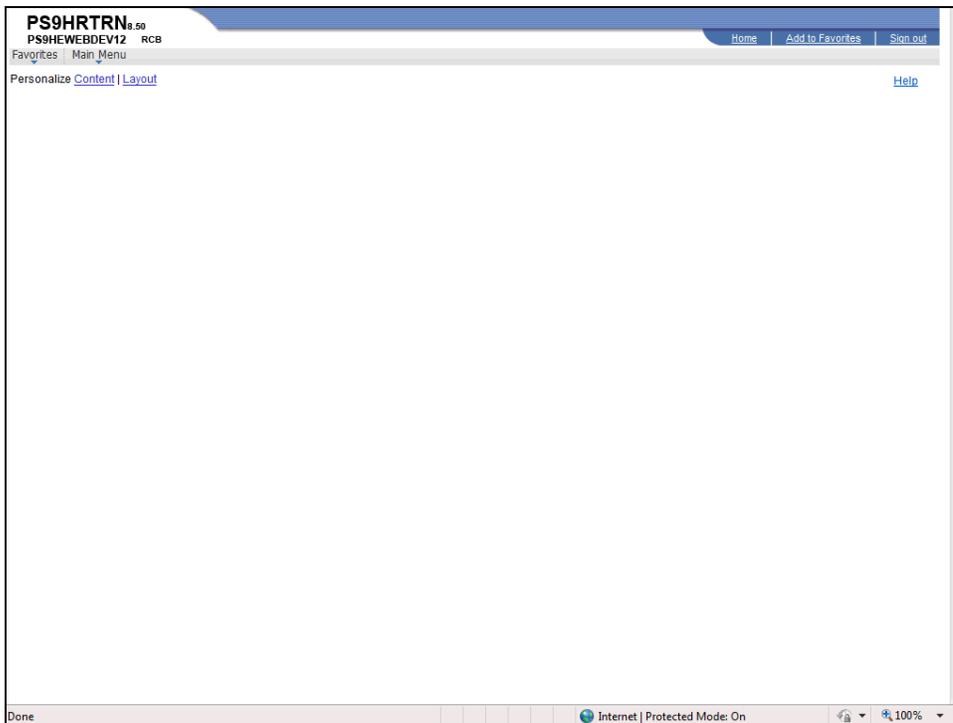
Step	Action
8.	<p>NOTE: The current Position Number must be known before changing the department. The Position Number can be found on the Work Location tab in Job Data.</p> <p>Enter the Position Number and click the Search button.</p> <p>Search</p>

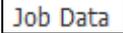
The screenshot displays the 'PS9HRTRN8.50' web application interface. The main content area is titled 'Position Information' and includes the following fields and sections:

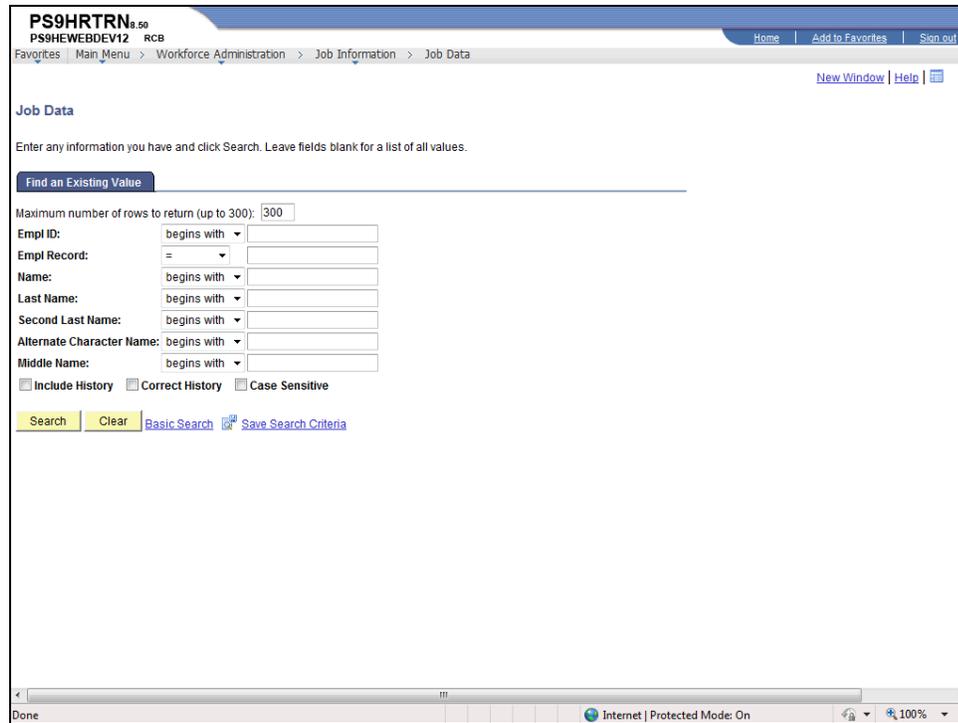
- Position Information:** Position Number: 00017787, Headcount Status: Filled, Current Head Count: 1 out of 1. Effective Date: 09/09/2003, Status: Active. Reason: NPP Move to New Pay Plan, Action Date: 09/08/2003. Position Status: Approved, Status Date: 12/02/2000, Key Position: .
- Job Information:** Business Unit: LSUNO LSUMC New Orleans, Job Code: 140470 ACCOUNTING SPECIALIST 2, Reg/Temp: Regular, Full/Part Time: Full-Time, Regular Shift: N/A, Union Code: [empty], Title: ACCOUNTING SPECIALIST 2, Short Title: ACCOUNTING.
- Work Location:** Reg Region: USA United States, Department: NO1651200 A/S-Cashier's Office-LRC, Company: 001 LSUHSC-New Orleans, Location: 484400004 ACCOUNTING SERVICES/CASHER'S, Reports To: [empty], Dot-Line: [empty], Supervisor Lvt: [empty], Security Clearance: [empty].
- Salary Plan Information:** Salary Admin Plan: AS, Grade: 610, Step: [empty].

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. 
14.	Enter the desired information into the Department field. Enter " NO1651 ".
15.	Click the A/S-Cashier's Office-LRC link. 
16.	NOTE: When updating Position Data, review each field to make sure the data is correct.
17.	Click the Save button. 

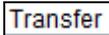
Step	Action
18.	Click the OK button. 
19.	Click the Home link. 



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



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

Step	Action
26.	Click the Add a new row at row 1 button. 
27.	<i>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.</i>
28.	Click the button to the right of the Action field. 
29.	Click the Transfer list item. 
30.	Click the button to the right of the Reason field. 
31.	Click the Department ID Change list item. 
32.	Enter the desired information into the Department field. Enter " 1651300 ".

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

John Doe
Employee

Empl ID: 00000000
Empl Record: 0

Work Location Find First 1 of 3 Last

*Effective Date: 06/01/2012 [B] [Go To Row](#) [+]

Effective Sequence: 0 *Action: Transfer [v]

HR Status: Active Reason: Department ID Change [v]

Payroll Status: Active *Job Indicator: Primary Job [v] Future

Position Number: 00017787 ACCOUNTING SPECIALIST 2
Acad Rank: [Use Position Data](#)

Position Entry Date: 04/29/2002 [B]
 Position Management Record

*Regulatory Region: USA United States
Company: 001 LSUHSC-New Orleans
*Business Unit: LSUNO LSUMC New Orleans
*Department: NO1651300 A/S-Cashier's Office-Fla Ave
Department Entry Date: 06/01/2012 [B]
*Location: 484400004 ACCOUNTING SERVICES/CASHIER'S
Establishment ID: [B] Date Created: 05/29/2012

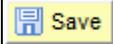
Last Start Date: 11/02/1998
Expected Job End Date: [B]

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

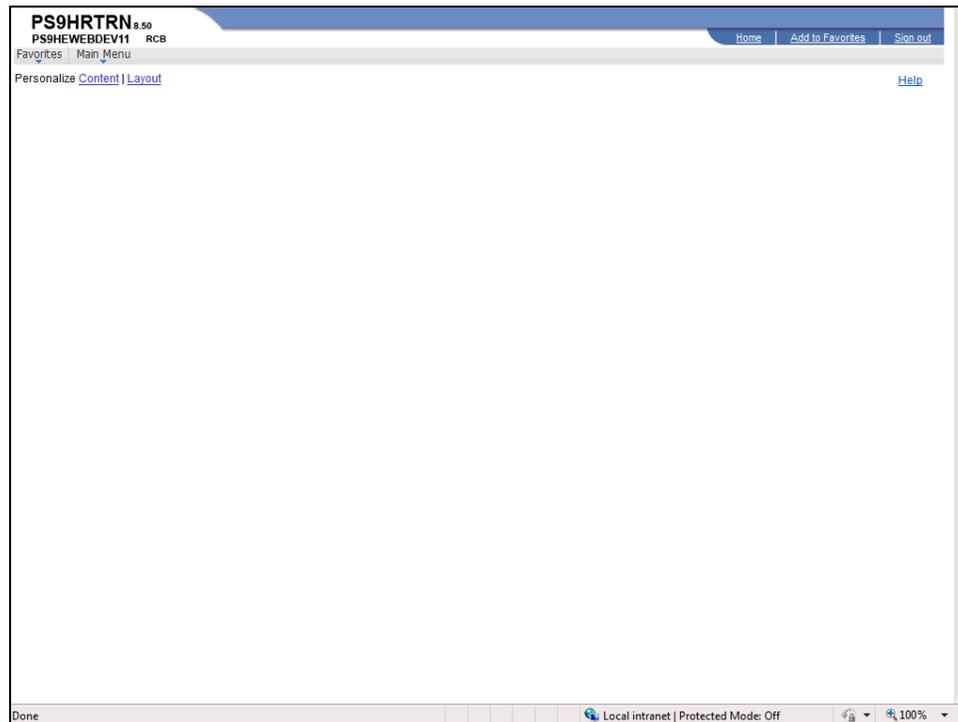
Done Internet | Protected Mode: On 100%

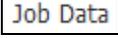
Step	Action
33.	Click the Save button. 
34.	NOTE: When updating an Employee's job data, review each field to make sure the data is correct.
35.	This completes Record a Department Change . End of Procedure.

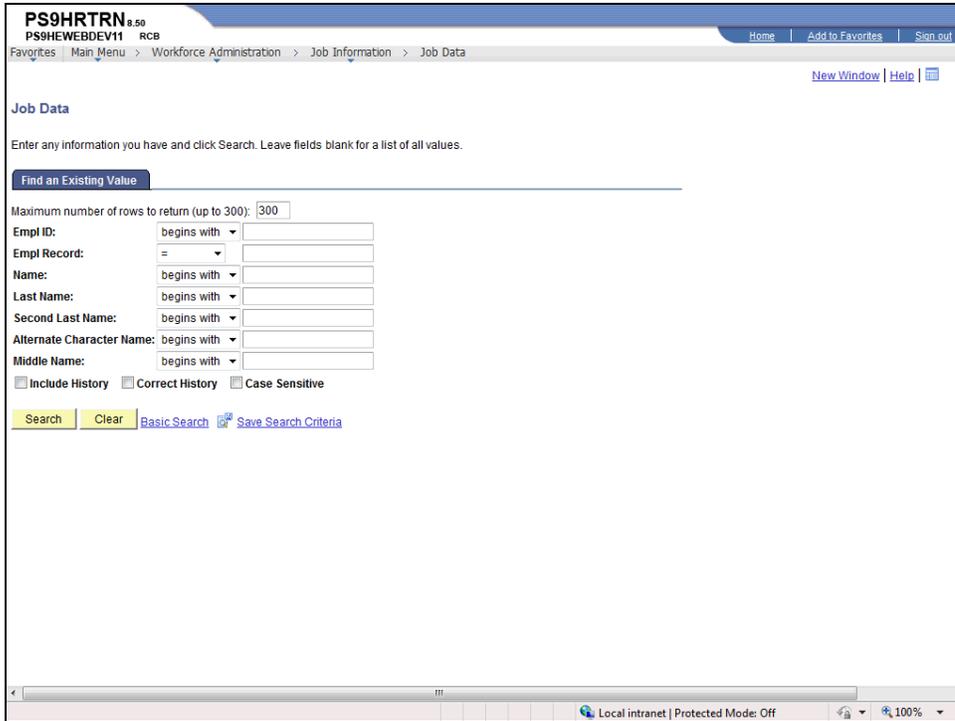
Record a Leave of Absence

Procedure

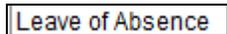
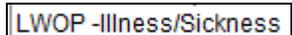
In this topic you will learn how to **Record a Leave of Absence**.

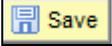


Step	Action
1.	Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Job Information menu. 
4.	Click the Job Data menu. 



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.

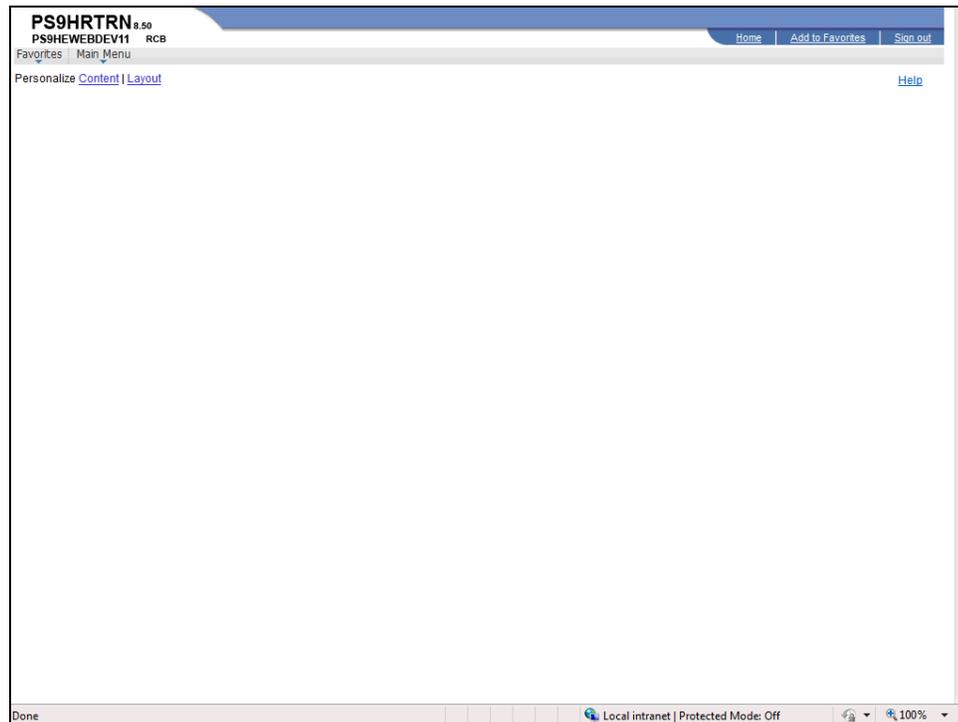
Step	Action
8.	Point to the Add a new row at row 1 button.
9.	The Effective Date is the date the leave will begin. In this example the Effective Date is 05/23/12. Click the Choose a date button. 
10.	Click the desired date. 
11.	Click the button to the right of the Action field. 
12.	Click the Leave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

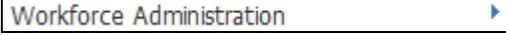
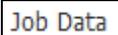
Step	Action
16.	You can enter the date directly into the field or select it from the calendar. Click the desired date. 
17.	Click the Save button. 
18.	This completes <i>Record a Leave of Absence</i> . End of Procedure.

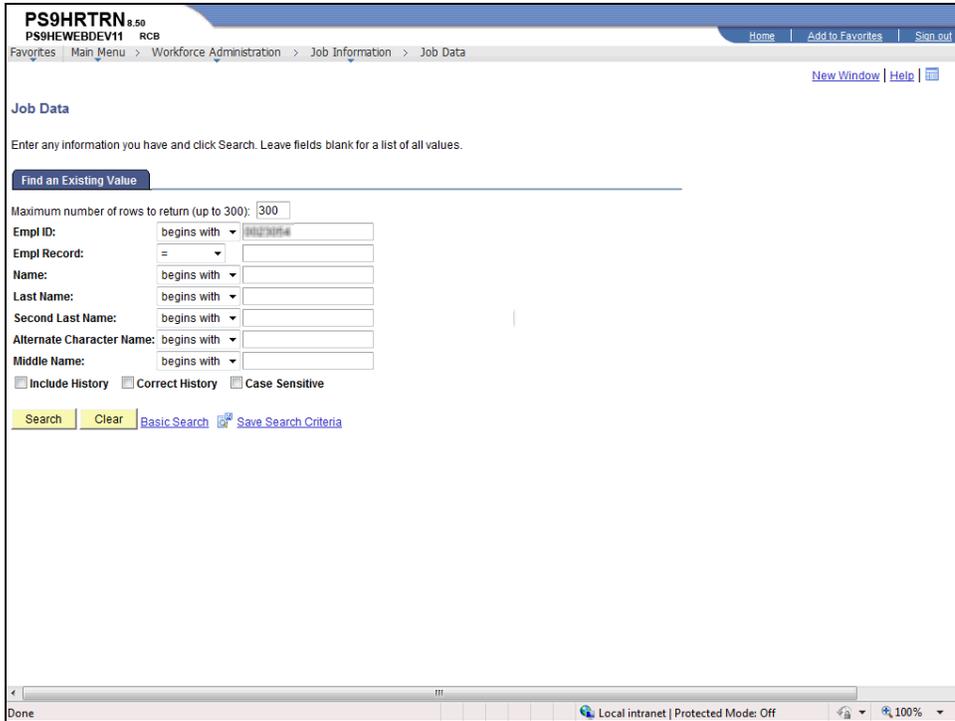
Return from Leave of Absence

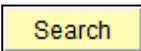
Procedure

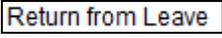
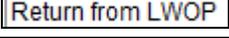
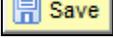
In this topic you will learn how to **Return from Leave of Absence**.



Step	Action
1.	Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Job Information menu. 
4.	Click the Job Data menu. 



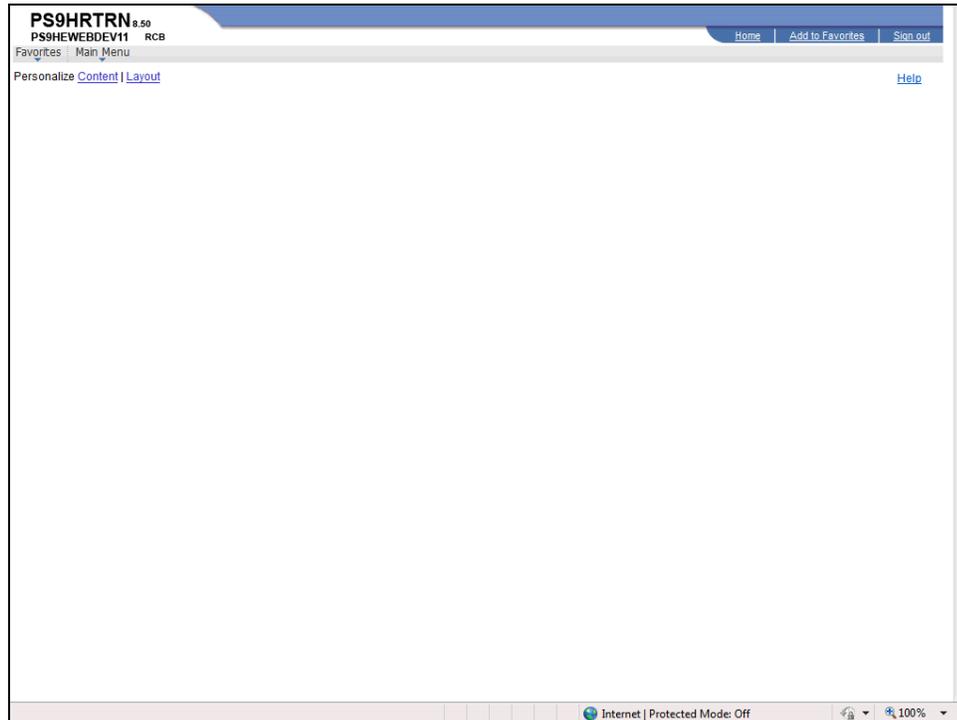
Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
6.	Click the Search button. 

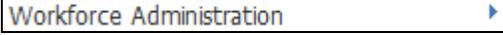
Step	Action
7.	Click the Add a new row at row 1 button. 
8.	Click the button to the right of the Action field. 
9.	Click the Return from Leave list item. 
10.	Click the button to the right of the Reason field. 
11.	Click the Return from LWOP list item. 
12.	Click the Save button. 
13.	This completes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

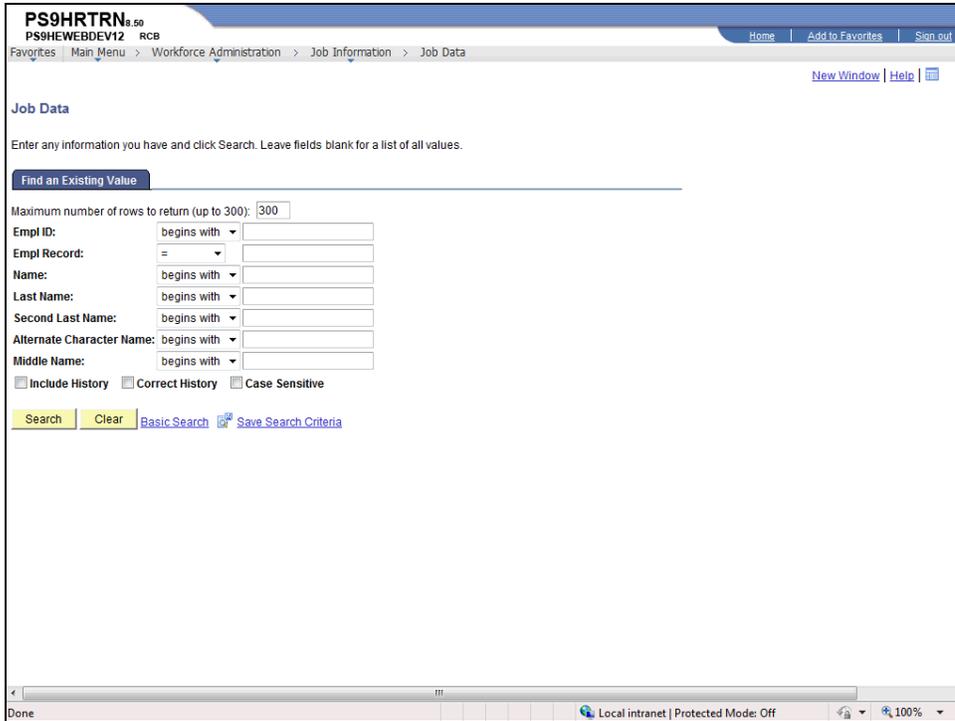
Record an Employee Promotion

Procedure

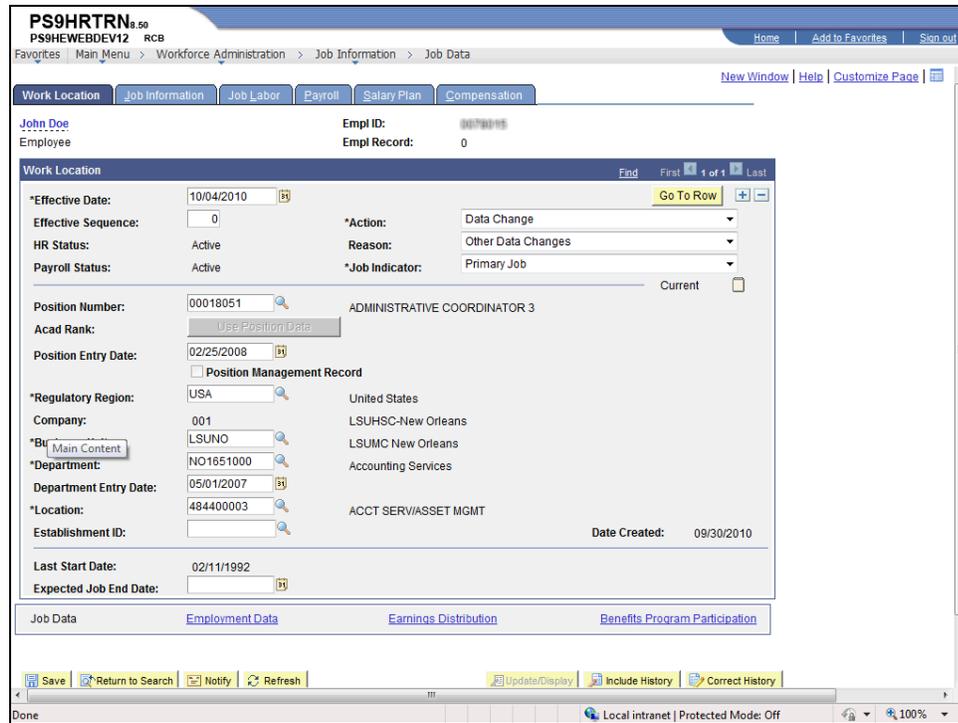
In this topic you will learn how to **Record an Employee Promotion**.

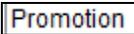
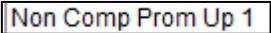


Step	Action
1.	Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Job Information menu. 
4.	Click the Job Data menu. 

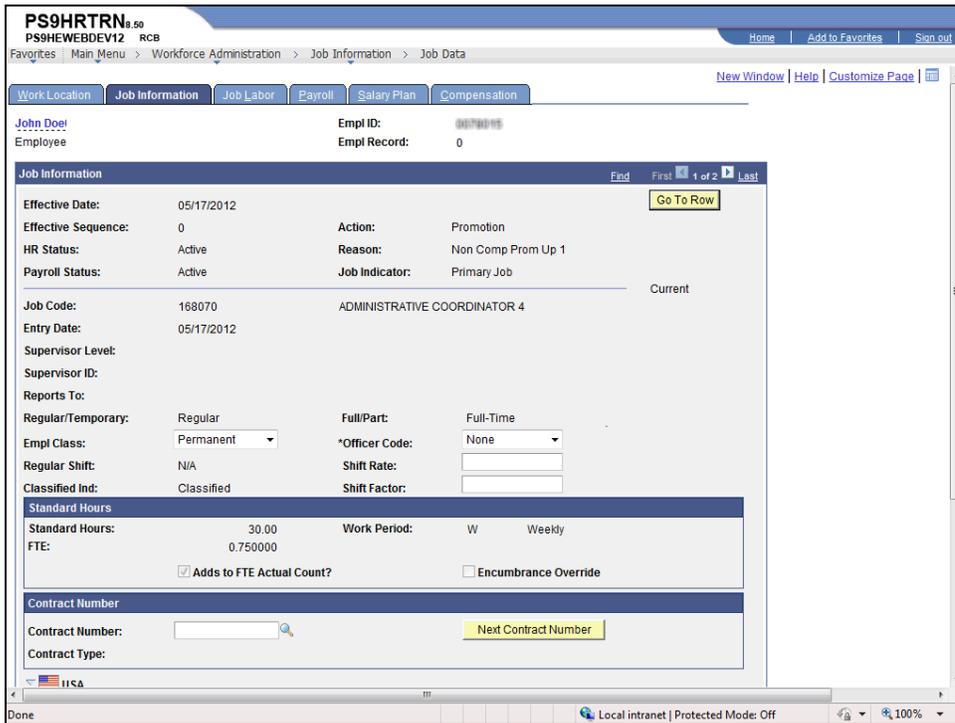


Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
6.	Click the Search button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div>

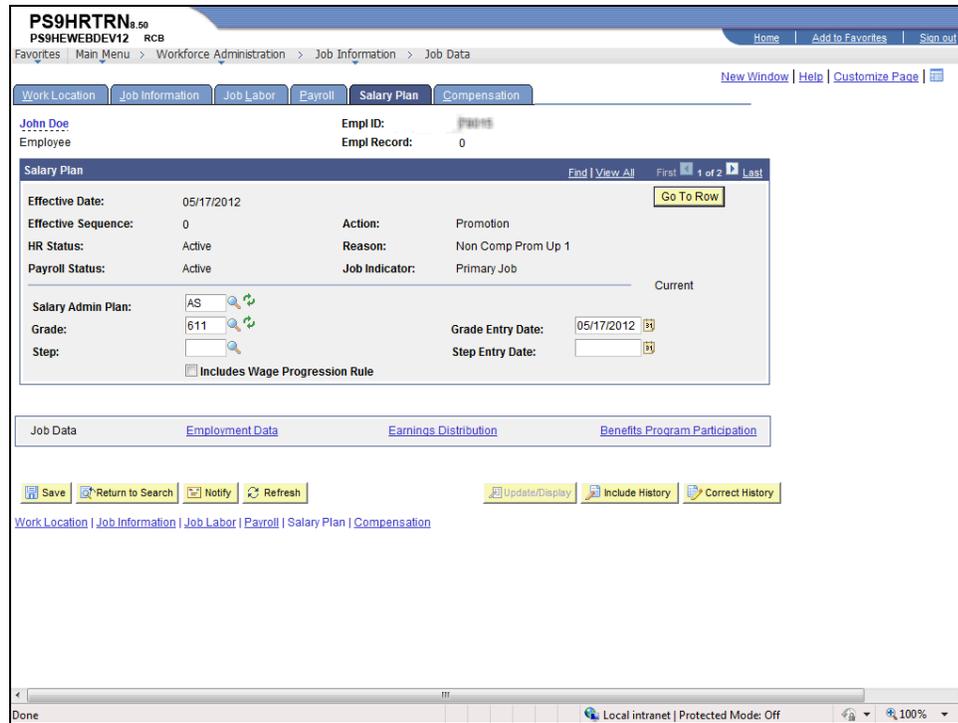


Step	Action
7.	Click the Add a new row at row 1 button. 
8.	Click the button to the right of the Action field. 
9.	Click the Promotion list item. 
10.	Click the button to the right of the Reason field. 
11.	Click the Non Comp Prom Up 1 list item. 
12.	Enter the desired information into the Position Number field. Enter " 00018089 ".
13.	<i>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.</i>
14.	Click the Job Information tab. 

Step	Action
15.	<p>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.</p> <p>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.</p>



Step	Action
16.	<p>Click the Payroll tab.</p> 
17.	<p>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.</p>



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Favorites | Main Menu > Workforce Administration > Job Information > Job Data

[New Window](#) | [Help](#) | [Customize Page](#) | 

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | **[Salary Plan](#)** | [Compensation](#)

John Doe
Employee

Empl ID: 98015
Empl Record: 0

Salary Plan Find | View All First 1 of 2 Last

Effective Date: 05/17/2012 [Go To Row](#)

Effective Sequence: 0 **Action:** Promotion

HR Status: Active **Reason:** Non Comp Prom Up 1

Payroll Status: Active **Job Indicator:** Primary Job Current

Salary Admin Plan: AS  

Grade: 611  

Step: 

Includes Wage Progression Rule

Grade Entry Date: 05/17/2012

Step Entry Date:

[Job Data](#) | [Employment Data](#) | [Earnings Distribution](#) | [Benefits Program Participation](#)

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#) | [Update/Display](#) | [Include History](#) | [Correct History](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Done Local intranet | Protected Mode: Off 100%

Step	Action
18.	Click the Compensation tab. 

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

New Window | Help | Customize Page

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

John Doe
Employee

Empl ID: 167845
Empl Record: 0

Compensation

Effective Date: 05/17/2012 Go To Row

Effective Sequence: 0
Action: Promotion

HR Status: Active
Reason: Non Comp Prom Up 1

Payroll Status: Active
Job Indicator: Primary Job

Compensation Rate: 14.15 USD *Frequency: H Hourly

Comparative Information

Change Amount: 0.000000 USD Hourly
Change Percent: 0.000 Compa-Ratio: 0.78

Pay Rates

Rate	Amount	Currency	Frequency	USD
Annual	22,069.831680	USD	Daily	84,883,968
Monthly	1,839.152640	USD	Hourly	14,147,328

Default Pay Components

Pay Components

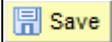
Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	14.147328	USD	H	

Calculate Compensation

Time and Labor Pay Rules

Begin Date: Pay from Sched: Time & Labor Status: Inactivate/Do Not Enroll:

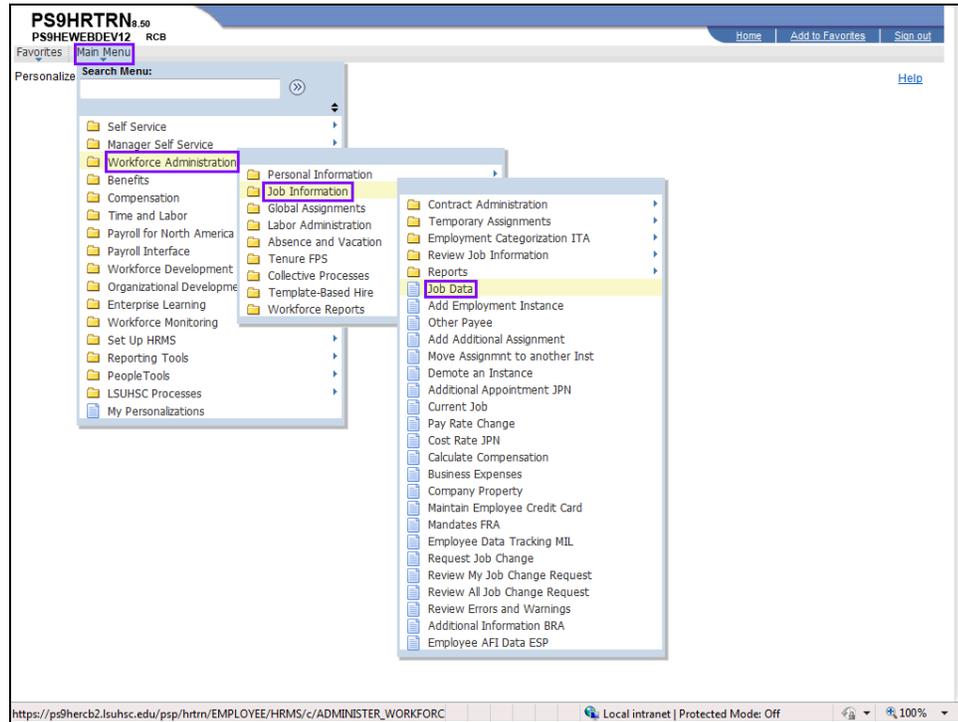
Done Local intranet | Protected Mode: Off 100%

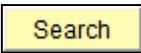
Step	Action
19.	Enter the desired information into the Comp Rate field. Enter " 16.36 ".
20.	Click the Calculate Compensation button. 
21.	Click the Save button. 
22.	This complete <i>Record an Employee Promotion</i> . End of Procedure.

Record a Pay Rate Change

Procedure

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

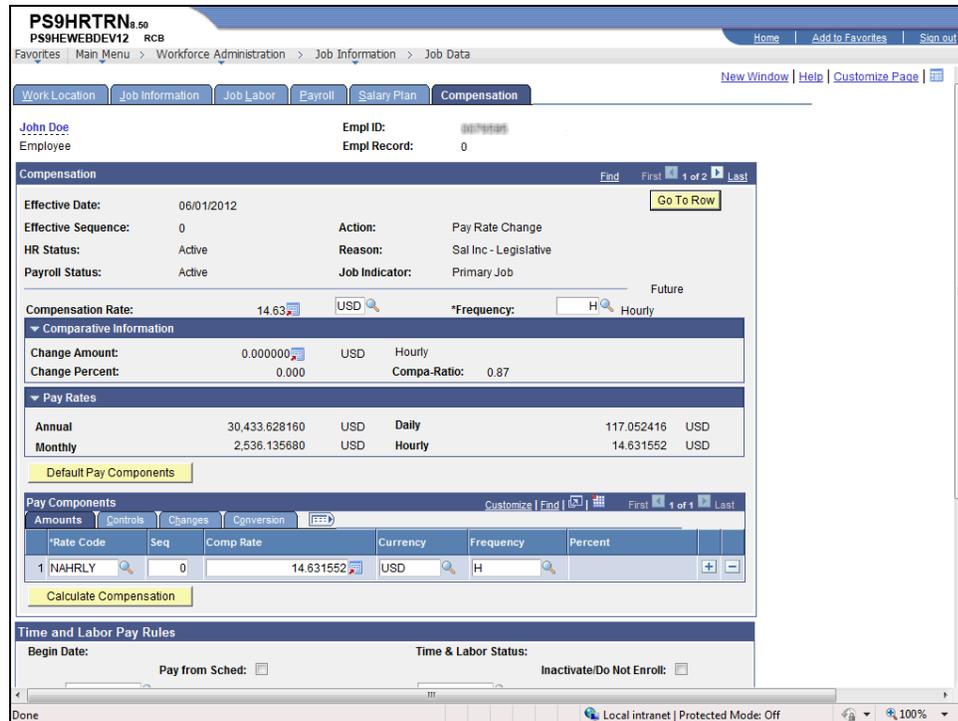


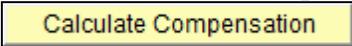
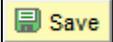
Step	Action
1.	Click Main Menu > Workforce Administration > Job Information > Job Data .
2.	Enter the Empl ID number or the Last Name to search for an employee. Click the Search button. 

The screenshot shows the 'Work Location' tab for employee John Doe. The form includes the following fields and values:

- Employee: John Doe
- Empl ID: 00017787
- Empl Record: 0
- Effective Date: 05/17/2012
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Position Number: 00017787
- Acad Rank: (Use Position Data)
- Position Entry Date: 04/29/2002
- Regulatory Region: USA
- Company: 001
- Business Unit: LSUNO
- Department: NO1651200
- Department Entry Date: 11/02/1998
- Location: 484400004
- Establishment ID: (blank)
- Date Created: 05/17/2012
- Last Start Date: 11/02/1998
- Expected Job End Date: (blank)

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.
8.	Click the button to the right of the Reason field.
9.	Click the Sal In - Legislative list item.
10.	Click the Compensation tab.
11.	NOTE: The employee's current Compensation Rate is \$14.63 and the Change Amount is 0.000000.



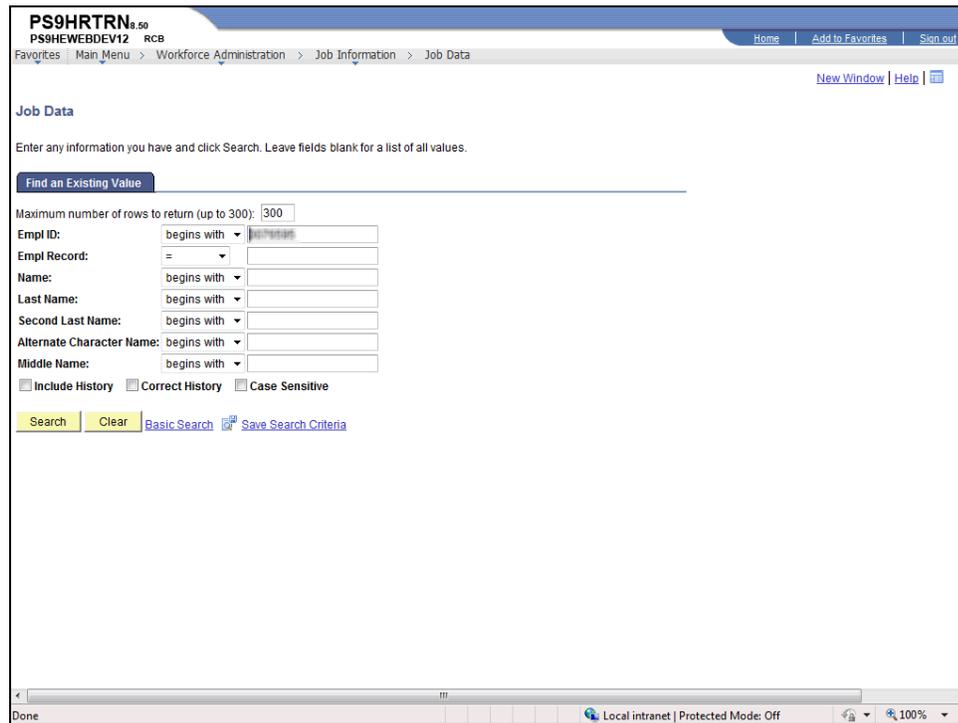
Step	Action
12.	Click the Changes tab. 
13.	Enter the desired information into the Change Percent field. Enter "3".
14.	Click the Calculate Compensation button. 
15.	<i>NOTE: The employee's Compensation Rate has changed from 14.63 to 15.07. The Change Amount is now 0.438947 instead of 0.000000, and the Change Percent is 3.000 instead of 0.000</i>
16.	Click the Save button. 
17.	This completes <i>Record a Pay Rate Change</i> . End of Procedure.

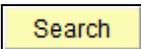
Record an Employee Termination

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 .



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

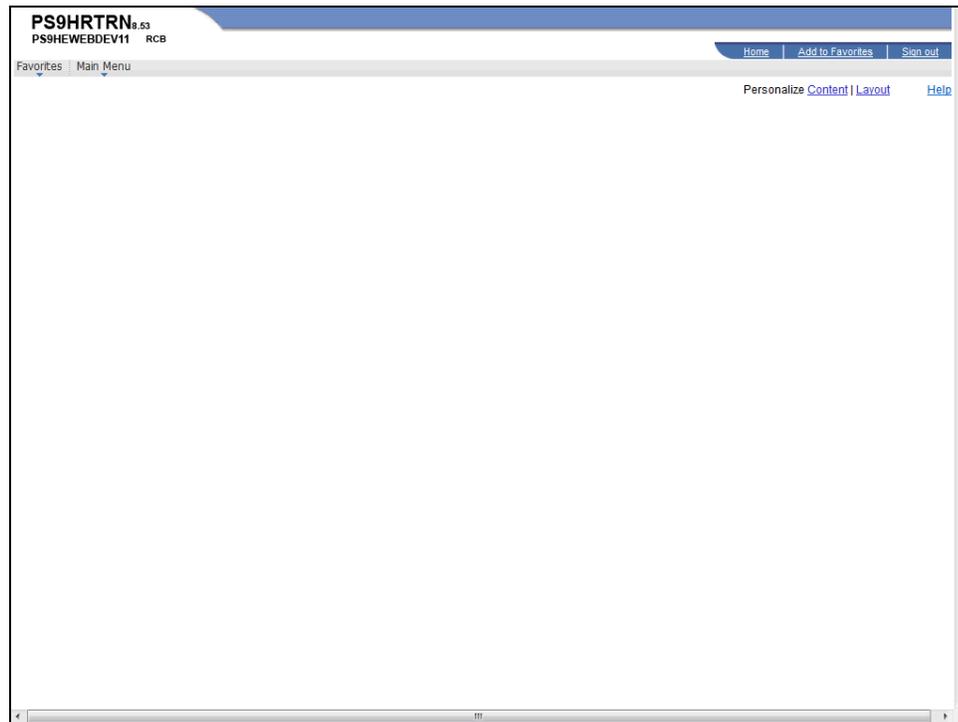
Step	Action
4.	Click the Add a new row at row 1 button.
5.	<i>NOTE: The Effective Date defaults to the current date. If the termination date is not the current date, enter the correct termination date in the Effective Date field or select it by clicking the Choose a date (calendar) button.</i>
6.	Click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

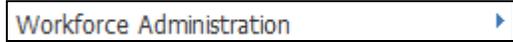
Step	Action
12.	This completes <i>Record an Employee Termination</i> . End of Procedure.

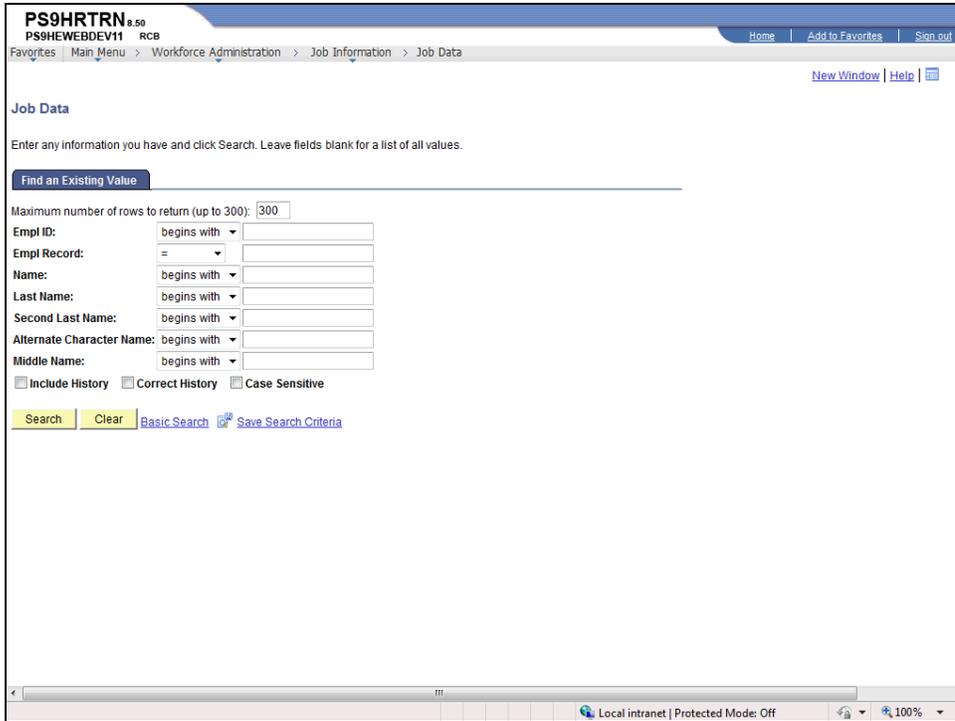
Record an Employee Rehire

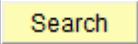
Procedure

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



Step	Action
1.	Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Job Information menu. 
4.	Click the Job Data menu. 



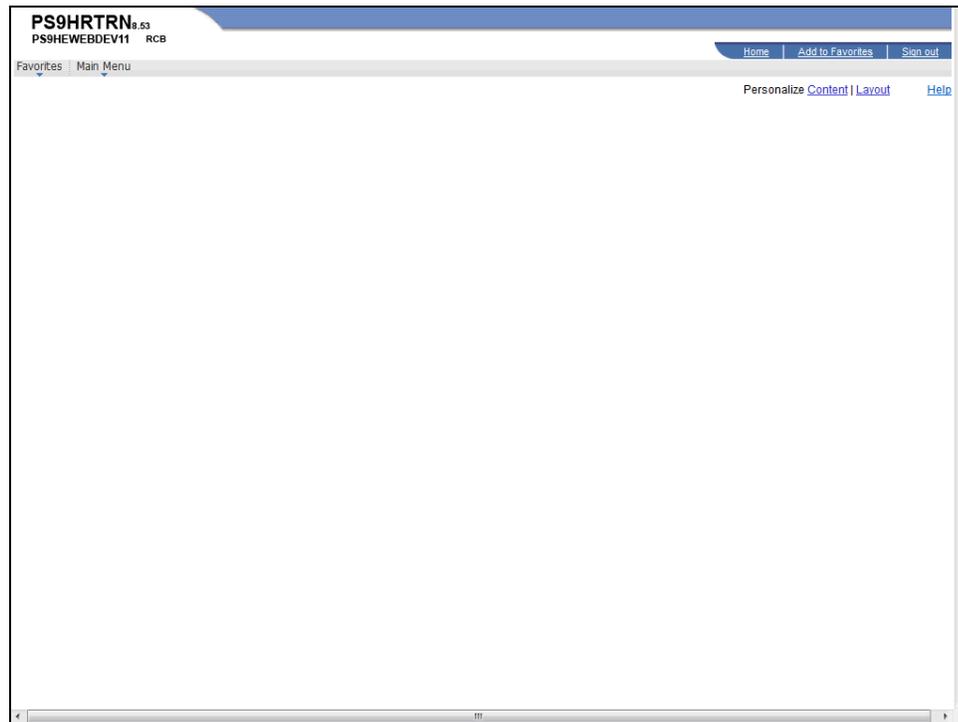
Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7-digit Empl ID Number ".
6.	Click the Search button. 

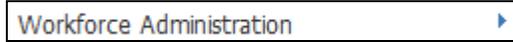
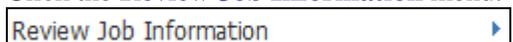
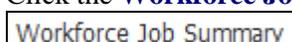
Step	Action
7.	Click the Add a new row at row 1 button.
8.	<i>NOTE: The Effective Date defaults to the current date. If the rehire date is not the current date, enter the correct rehire date in the Effective Date field or select it by clicking the Choose a date (calendar) button.</i>
9.	Click the button to the right of the Action field.
10.	Click the Rehire list item.
11.	Click the button to the right of the Reason field.
12.	Click the Non-Comp Re-emp Prob/Prior St list item.
13.	<i>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.</i> Click the Save button.
14.	This completes Record an Employee Rehire . End of Procedure.

View Job Summary Information

Procedure

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



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

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

[New Window](#) | [Help](#) | 

Workforce Job Summary

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

[Find an Existing Value](#)

▼ Search Criteria

Empl ID: begins with

Empl Record: =

Name: begins with

Last Name: begins with

Second Last Name: begins with

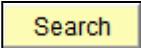
Alternate Character Name: begins with

Middle Name: begins with

Organizational Relationship: =

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

New Window | Help | Customize Page |

Workforce Job Summary

John Doe EMP Empl ID: 00000002

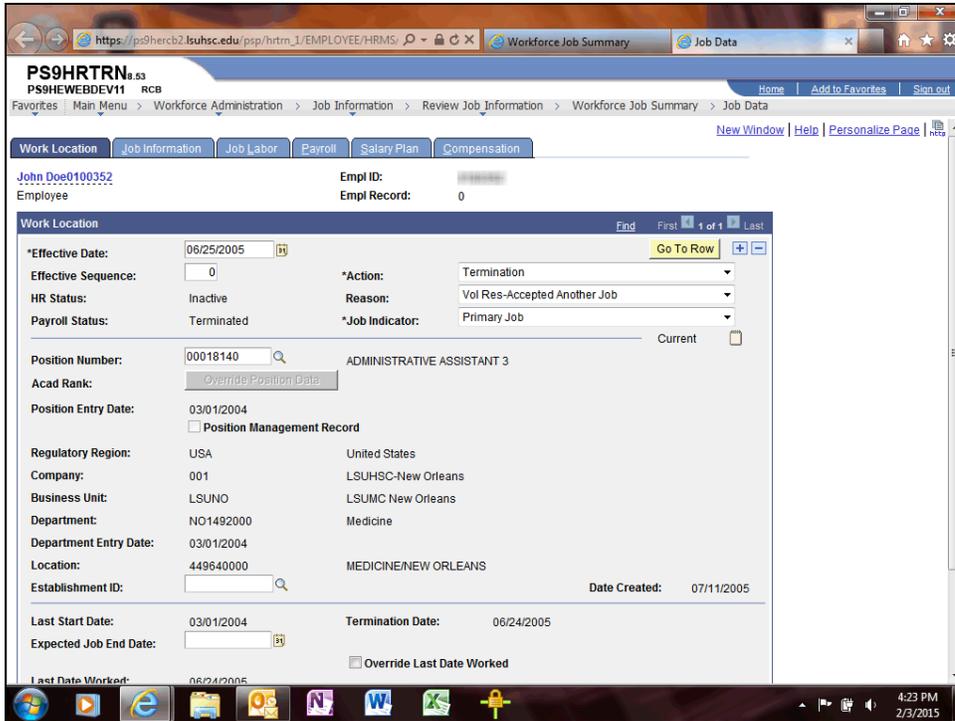
Job Information Customize | Find | First 1-5 of 5 Last

Org Relation	Empl Record	Effective Date	Seq	Action	Action Reason	Key Person	Go To Job
EMP	0	06/25/2005	0	Terminatn	Vol Resign	<input type="checkbox"/>	Job Data
EMP	0	01/17/2005	0	Job Reclas	JC w-o Adj	<input type="checkbox"/>	Job Data
EMP	0	09/01/2004	1	Pay Rt Chg	12-000	<input type="checkbox"/>	Job Data
EMP	0	09/01/2004	0	Data Chg	09-926	<input type="checkbox"/>	Job Data
EMP	0	03/01/2004	0	Hire	01-101	<input type="checkbox"/>	Job Data

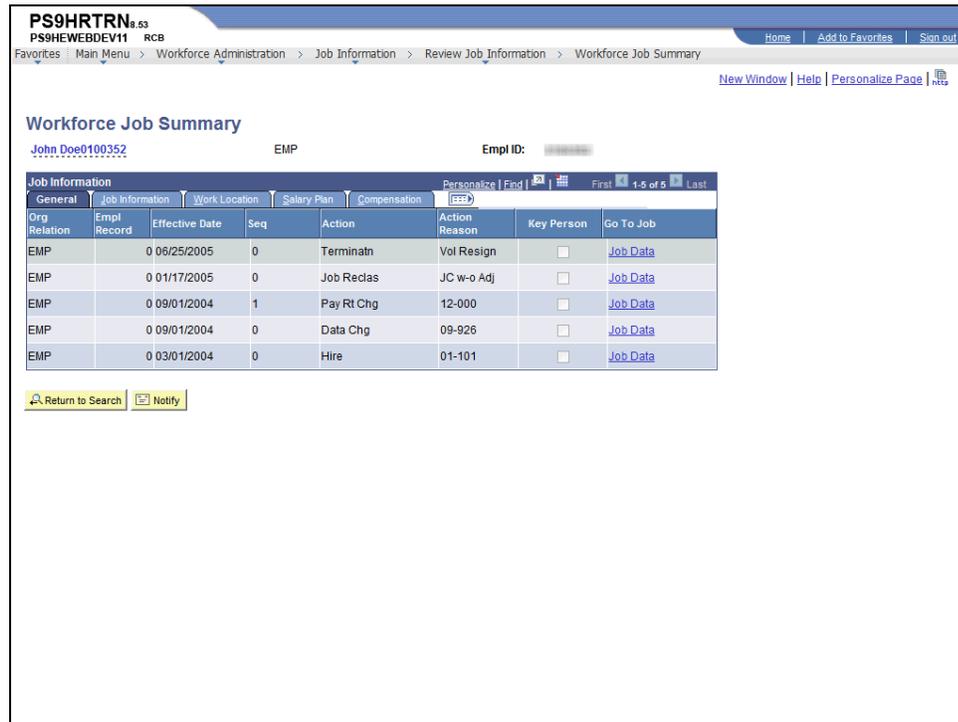
[Return to Search](#) [Notify](#)

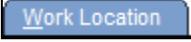
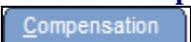
Local intranet | Protected Mode: Off 100%

Step	Action
7.	<p>The General tab displays Action and Action Reason.</p> <p>Click the Job Data link.</p> <p>Job Data</p>



Step	Action
8.	Click the Close button. 



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. 

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

[New Window](#) | [Help](#) | [Personalize Page](#) | 

Salary Components

John Doe0100352 Empl ID: Empl Record: 0

Compensation Rate: 12.000000 USD

Compensation Frequency: H Hourly

Pay Components

Amounts | Controls | Changes | Conversion | **Exit**

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
NAHRLY	0	12.00	USD	Hourly			

OK Cancel

Step	Action
14.	Click the OK button.

OK

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

New Window | Help | Personalize Page | 

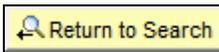
Workforce Job Summary

John Doe0100352 EMP Empl ID: 

Job Information Personalize | Find |  First 1-5 of 5 Last

Org Relation	Empl Record	Effective Date	Seq	Annual Rate	Monthly Rate	Daily Rate	Hourly Rate	Currency	Change Percent	Components
EMP		06/25/2005	0	24960.000	2080.000	96.000	12.000000	USD		Components
EMP		01/17/2005	0	24960.001	2080.000	96.000	12.000000	USD		Components
EMP		09/01/2004	1	24960.001	2080.000	96.000	12.000000	USD	4.000	Components
EMP		09/01/2004	0	24000.001	2000.000	92.308	11.538462	USD		Components
EMP		03/01/2004	0	24000.001	2000.000	92.308	11.538462	USD		Components

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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PS9HEWEBDEV11 RCB

Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

[New Window](#) | [Help](#) |

Workforce Job Summary

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

[Find an Existing Value](#)

Search Criteria

Empl ID: begins with

Empl Record: = 0

Name: begins with

Last Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

Organizational Relationship: =

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1 of 1 Last

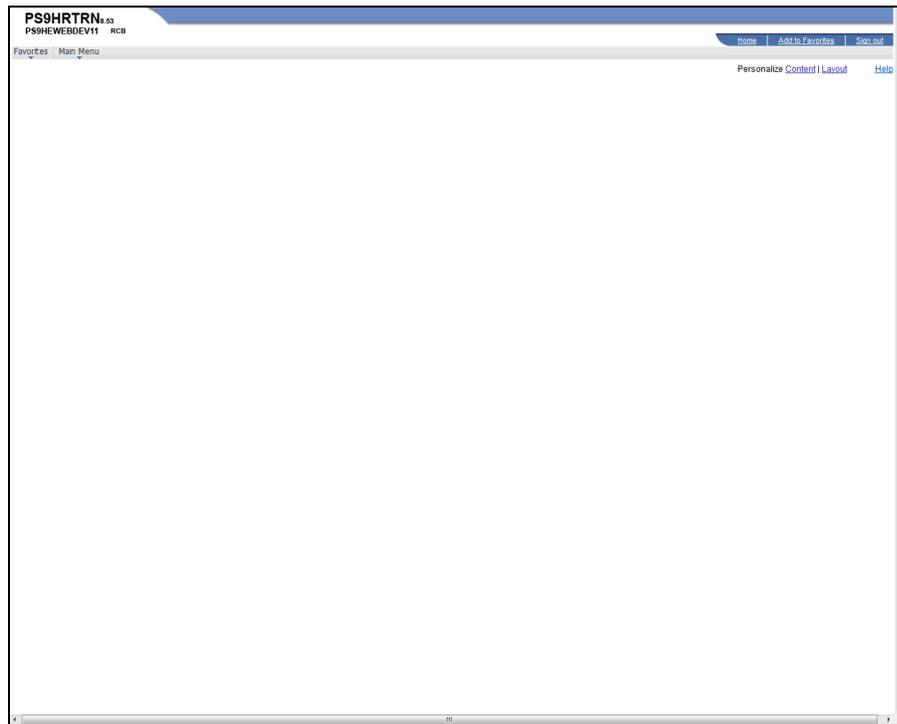
Empl ID	Empl Record	Name	Last Name	Second Last Name	Alternate Character Name	Middle Name	Organizational Relationship
0		John Doe	DOE	(blank)	(blank)	(blank)	Emp

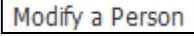
Step	Action
18.	If you would like to view another employee's Job Summary, click the Clear button to clear the previous search criteria, to enter another Empl ID.
19.	This completes <i>View Job Summary Information</i> . End of Procedure.

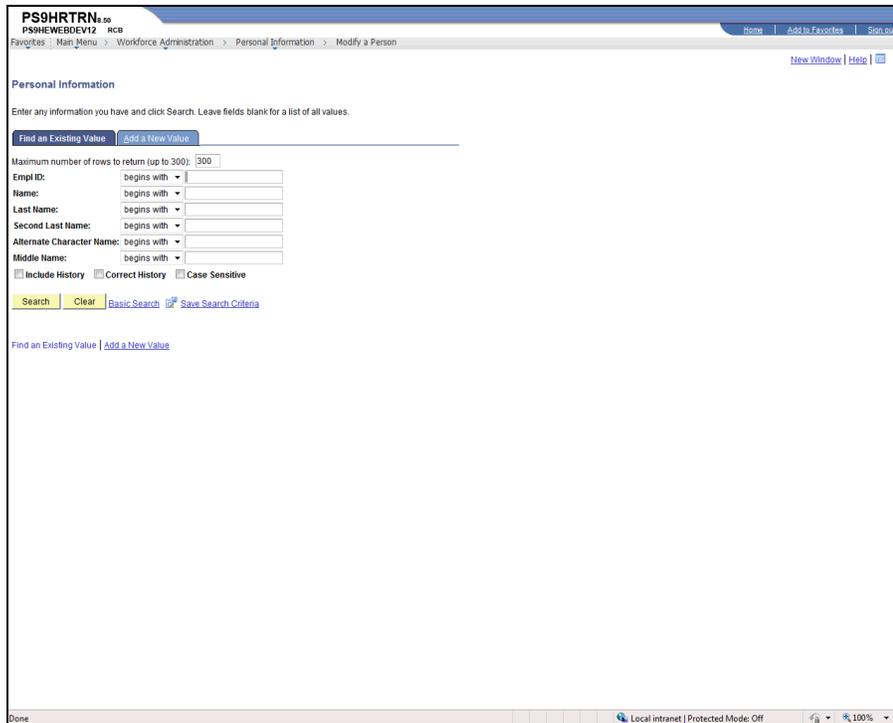
Record an Employee Data Change

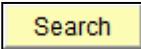
Procedure

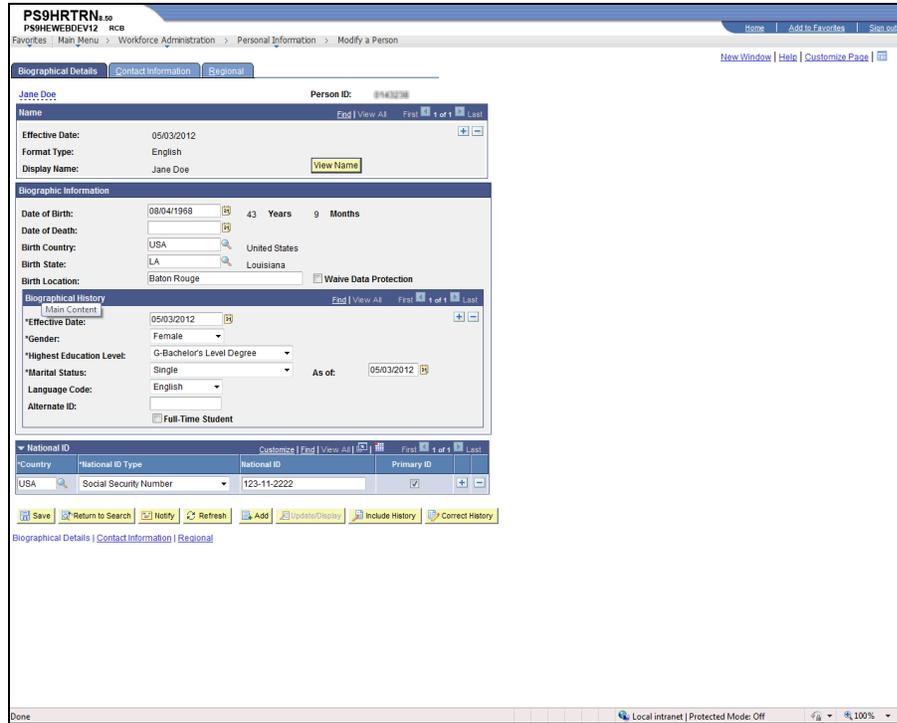
In this topic you will learn how to Record an **Employee Data Change**.



Step	Action
1.	Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Personal Information menu. 
4.	Click the Modify a Person menu. 



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



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Home | Add to Favorites | Sign out

Favorites | Main Menu | Workforce Administration | Personal Information | Modify a Person

[New Window](#) | [Help](#) | [Customize Page](#)

Biographical Details | **Contact Information** | **Regional**

Jane Doe Person ID: 0943236

Name: Jane Doe End | View All | First | 1 of 1 | Last

Effective Date: 05/03/2012
Format Type: English
Display Name: Jane Doe [View Name](#)

Biographic Information

Date of Birth: 08/04/1968 43 Years 0 Months
Date of Death:
Birth Country: USA United States
Birth State: LA Louisiana
Birth Location: Baton Rouge Waive Data Protection

Biographical History

Main Content End | View All | First | 1 of 1 | Last

*Effective Date: 05/03/2012
*Gender: Female
*Highest Education Level: G-Bachelor's Level Degree
*Marital Status: Single As of: 05/03/2012
Language Code: English
Alternate ID: Full-Time Student

National ID Customize | End | View All | First | 1 of 1 | Last

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	123-11-2222	<input checked="" type="checkbox"/>

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#) | [Add](#) | [Update/Display](#) | [Include History](#) | [Correct History](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#)

Done Local intranet | Protected Mode: Off 100%

Step	Action
7.	Click the Contact Information tab. 

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Workforce Administration > Personal Information > Modify a Person

Home | Add My Favorites | Sign Out

Biographical Details | Contact Information | Regional

Person ID: 00000000

John Doe

Current Addresses					
Address Type	As Of Date	Status	Address	View Address Detail	
Home	05/03/2012	A	1234 Main Street New Orleans, LA 70112 Orleans	View Address Detail	+ -
Mailing	05/03/2012	A	1234 Main Street New Orleans, LA 70112 Orleans	View Address Detail	+ -

Phone Information			
Phone Type	Telephone	Extension	Preferred
Home	504555-2222		<input type="checkbox"/>
Work	504555-9999		<input checked="" type="checkbox"/>

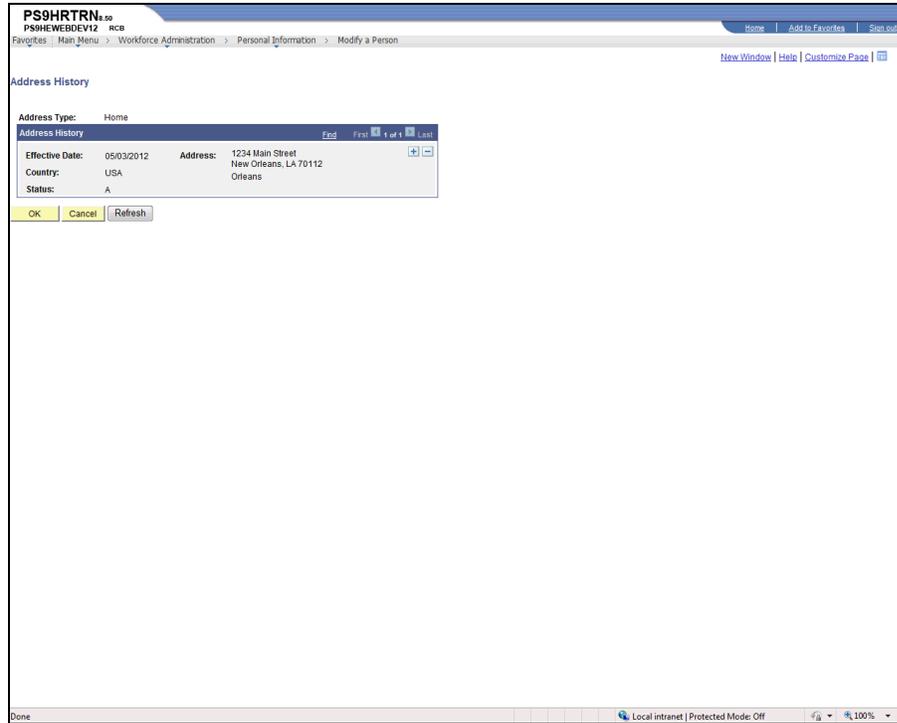
Email Addresses		
Email Type	Email Address	Preferred
LSUHSC Email Address	jdoe@lsuhsc.edu	<input checked="" type="checkbox"/>

Save | Return to Search | Notify | Refresh | Add | Update/Display | Include History | Correct History

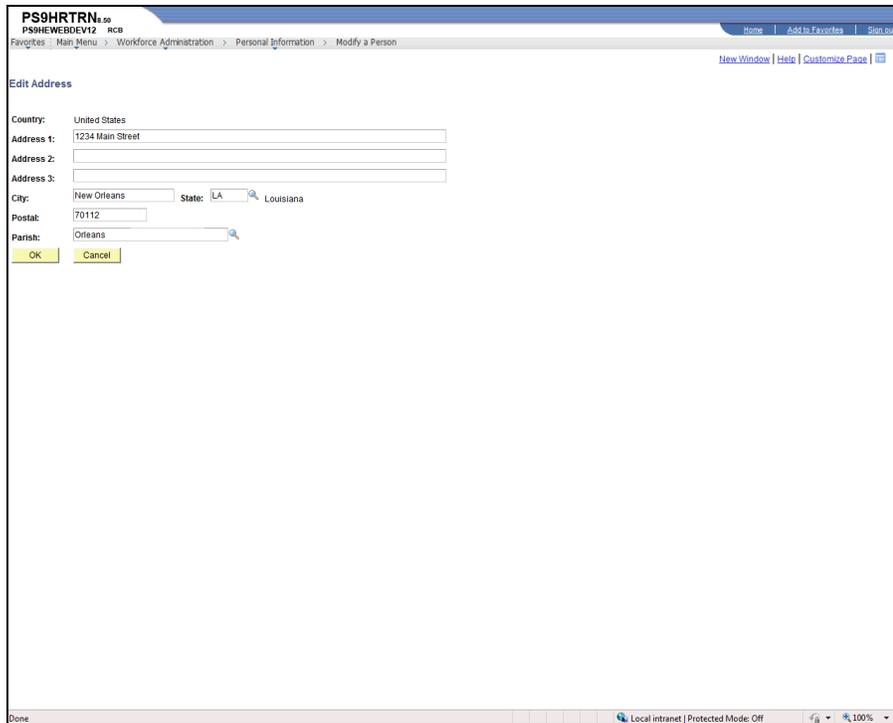
Biographical Details | Contact Information | Regional

Done | Local intranet | Protected Mode: Off | 100%

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



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



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Home | Add to Favorites | Sign out

Favorites | Main Menu | Workforce Administration | Personal Information | Modify a Person

New Window | Help | Customize Page

Edit Address

Country: United States

Address 1: 1234 Main Street

Address 2:

Address 3:

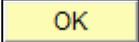
City: New Orleans State: LA Louisiana

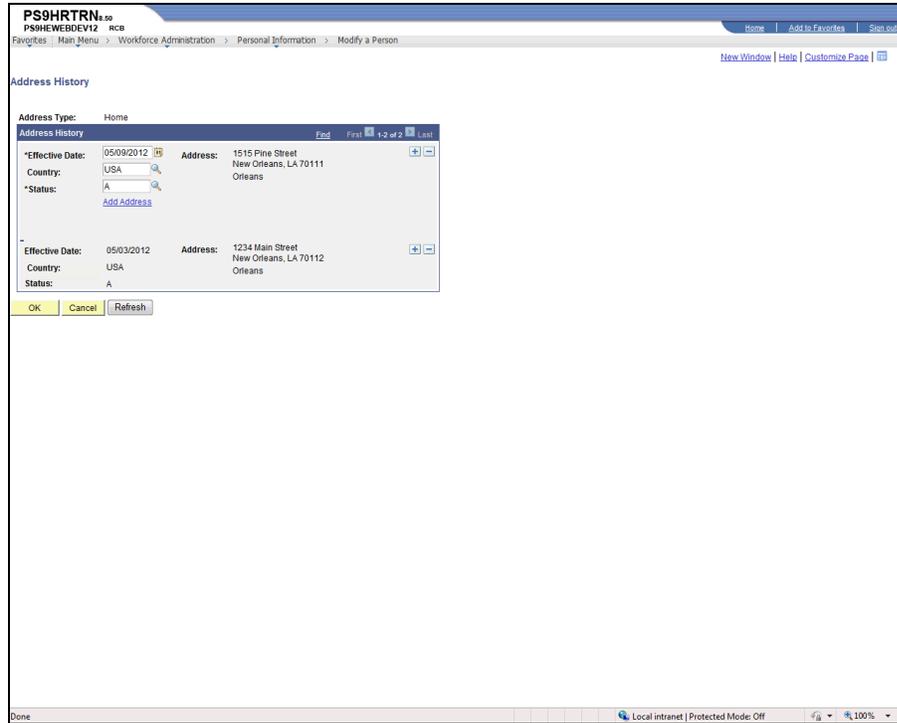
Postal: 70112

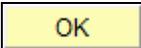
Parish: Orleans

OK Cancel

Done Local intranet | Protected Mode: Off 100%

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. 



Step	Action
14.	Click the OK button. 

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Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person

Biographical Details | **Contact Information** | Regional

Jane Doe Person ID: [REDACTED]

Current Addresses				
Address Type	As Of Date	Status	Address	
Home	05/09/2012	A	1515 Pine Street New Orleans, LA 70111 Orleans	Edit/View Address Detail
Mailing	05/03/2012	A	1234 Main Street New Orleans, LA 70112 Orleans	View Address Detail

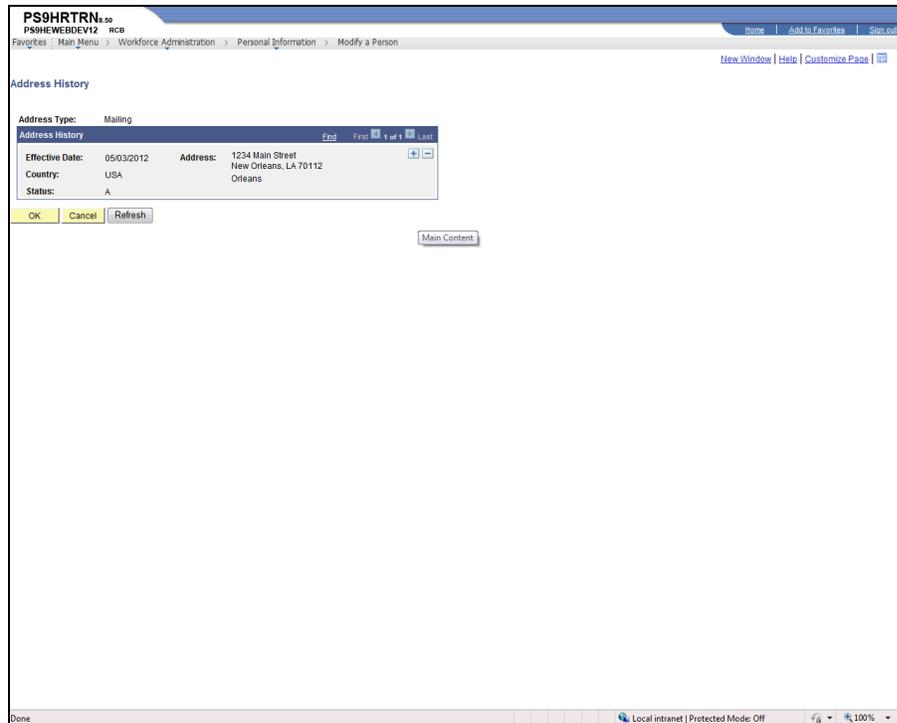
Phone Information			
Phone Type	Telephone	Extension	Preferred
Home	504/555-2222		<input type="checkbox"/>
Work	504/555-9999		<input checked="" type="checkbox"/>

Email		
Email Type	Email Address	Preferred
LSUHSC Email Address	jdoe@lsuhsc.edu	<input checked="" type="checkbox"/>

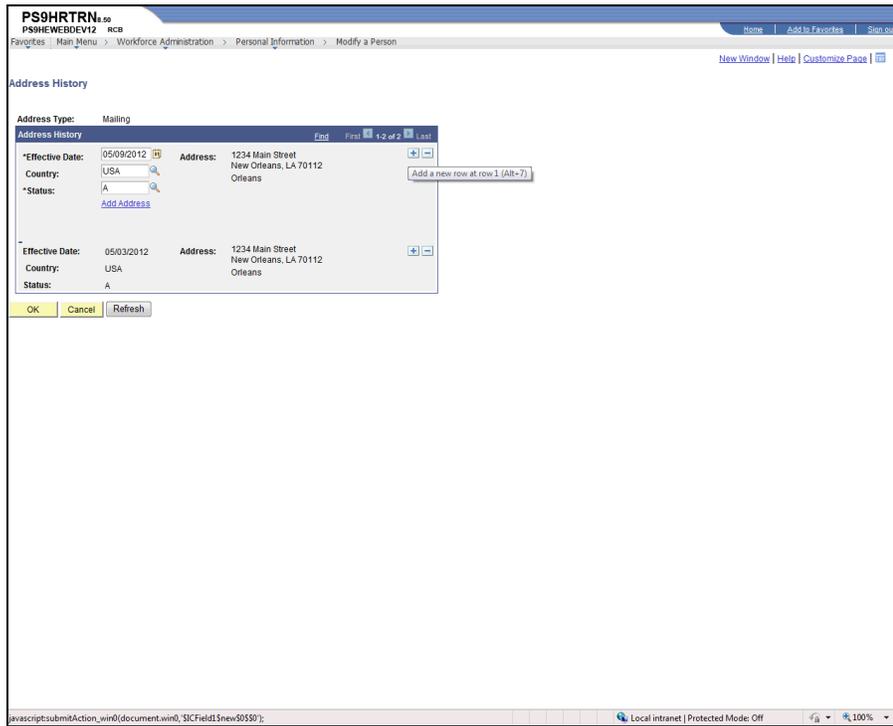
[Biographical Details](#) | [Contact Information](#) | [Regional](#)

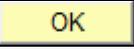
Done

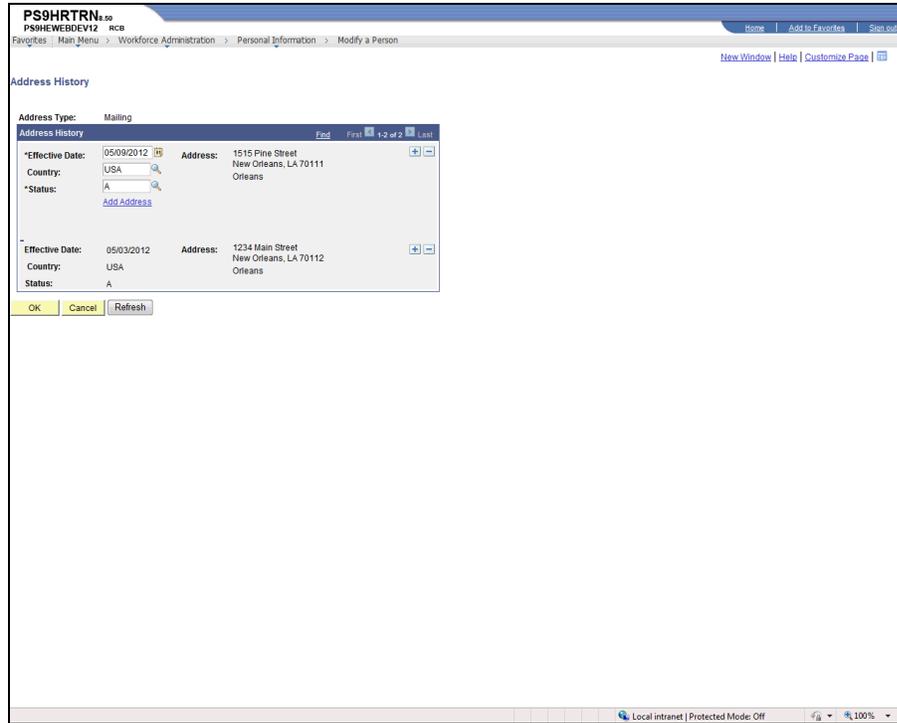
Step	Action
15.	Click the View Address Detail link. View Address Detail

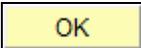


Step	Action
16.	Click the Add a new row at row 1 button. 



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



Step	Action
21.	Click the OK button. 

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Workforce Administration > Personal Information > Modify a Person

Home | Add My Favorites | Sign Out

Biographical Details | Contact Information | Regional

Person ID: 00000000

John Doe

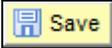
Address Type	As Of Date	Status	Address	
Home	05/09/2012	A	1515 Pine Street New Orleans, LA 70111 Orleans	Edit/View Address Detail
Mailing	05/09/2012	A	1515 Pine Street New Orleans, LA 70111 Orleans	Edit/View Address Detail

Phone Type	Telephone	Extension	Preferred
Home	504555-2222		<input type="checkbox"/>
Work	504555-9999		<input checked="" type="checkbox"/>

Email Type	Email Address	Preferred
LSUHSC Email Address	jdoe@lsuhsc.edu	<input checked="" type="checkbox"/>

Save | Return to Search | Notify | Refresh | Add | Update/Display | Include History | Correct History

Biographical Details | Contact Information | Regional

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

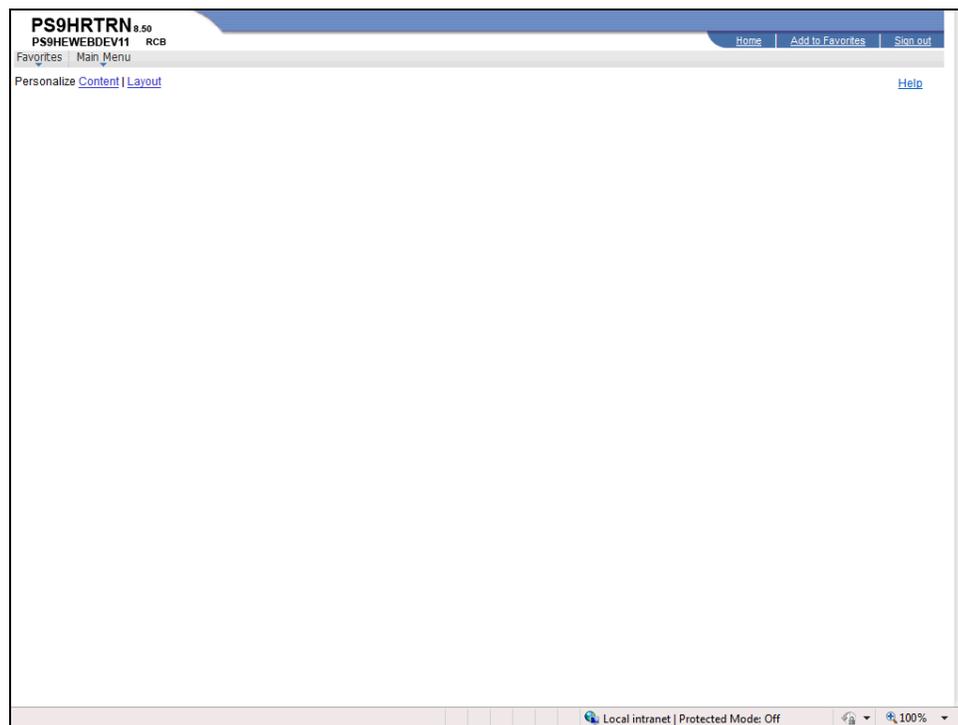
Budget Information

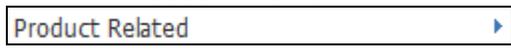
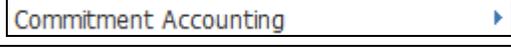
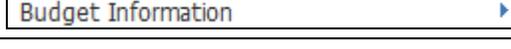
View Department Budget Tables

Procedure

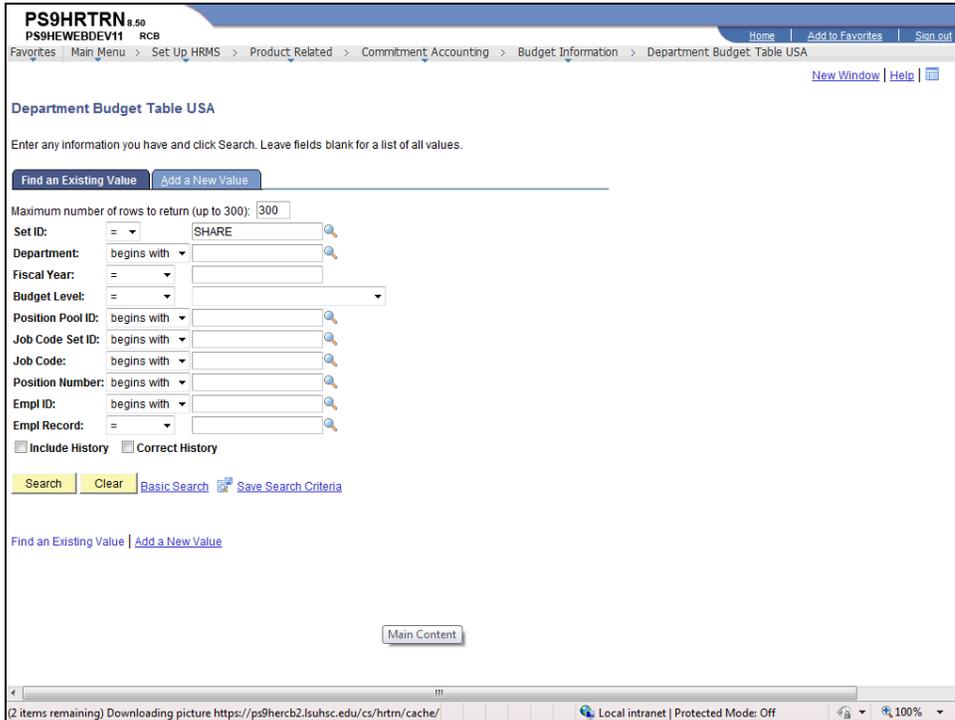
In this topic you will learn how to *View Department Budget Table - LSUNO*.

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.*

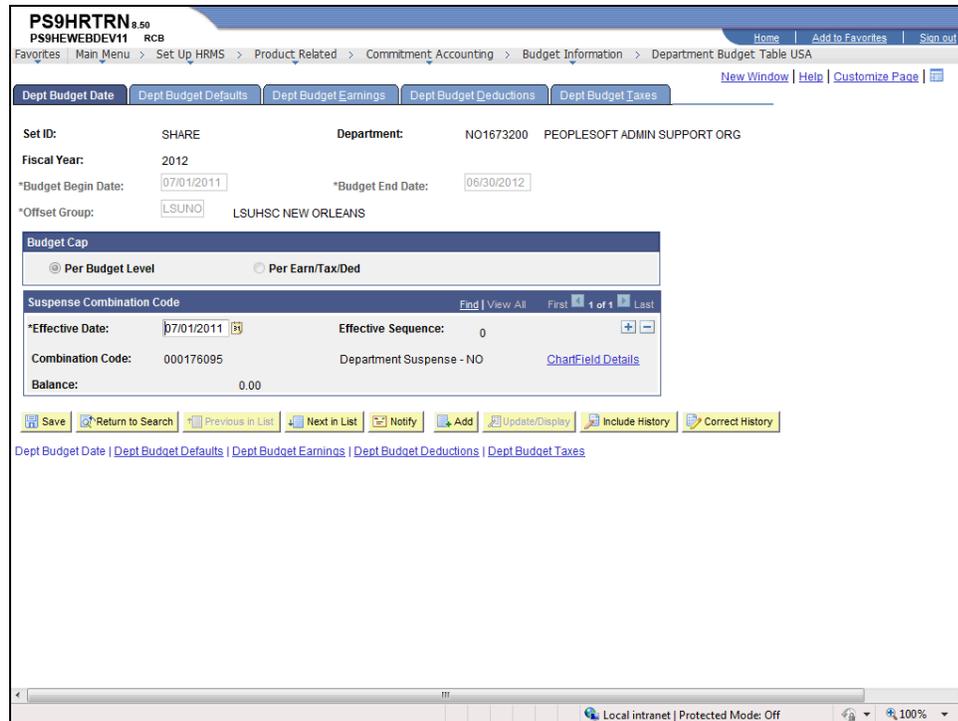


Step	Action
1.	Click the Main Menu button. 
2.	Click the Set Up HRMS menu. 
3.	Click the Product Related menu. 
4.	Click the Commitment Accounting menu. 
5.	Click the Budget Information menu. 

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



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.



The screenshot shows the 'Dept Budget Earnings' tab selected in the application. The interface includes the following fields and sections:

- Set ID:** SHARE
- Department:** NO1673200 PEOPLESOFT ADMIN SUPPORT ORG
- Fiscal Year:** 2012
- *Budget Begin Date:** 07/01/2011
- *Budget End Date:** 06/30/2012
- *Offset Group:** LSUNO LSUHSC NEW ORLEANS
- Budget Cap:** Radio buttons for 'Per Budget Level' (selected) and 'Per Earn/Tax/Ded'.
- Suspense Combination Code:** Find | View All | First | 1 of 1 | Last
- *Effective Date:** 07/01/2011
- Effective Sequence:** 0
- Combination Code:** 000176095
- Department Suspense - NO:** ChartField Details
- Balance:** 0.00

Navigation buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display, Include History, and Correct History.

Step	Action
10.	Click the Dept Budget Earnings tab. 
11.	<p>Dept Budget Earnings Fields:</p> <p>Effective Date - The date the actions begins.</p> <p>Combination Code - The combination codes are used to identify funding sources for the budget.</p> <p>Distribution % - The percent of funding allocated to the specified account for the assigned position which the employee holds.</p> <p><i>NOTE: All of the remaining tabs contained in the component function in the same way.</i></p>

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

[New Window](#) | [Help](#) | [Customize Page](#) |

Dept Budget Date | Dept Budget Defaults | **Dept Budget Earnings** | Dept Budget Deductions | Dept Budget Taxes

Set ID: SHARE Department: NO1673200 — PEOPLESOFT ADMIN SUPPORT ORG Fiscal Year: 2012
 Budget Begin Date: 07/01/2011 Offset Group: LSUNO Budget Cap
 Budget End Date: 06/30/2012 Per Budget Level Per Earn/Tax/Ded

Level Find | View All First 1 of 1 Last

Department Position Pool Jobcode Position Appointment + -

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

Earnings Distribution Customize | Find | First 1-3 of 3 Last

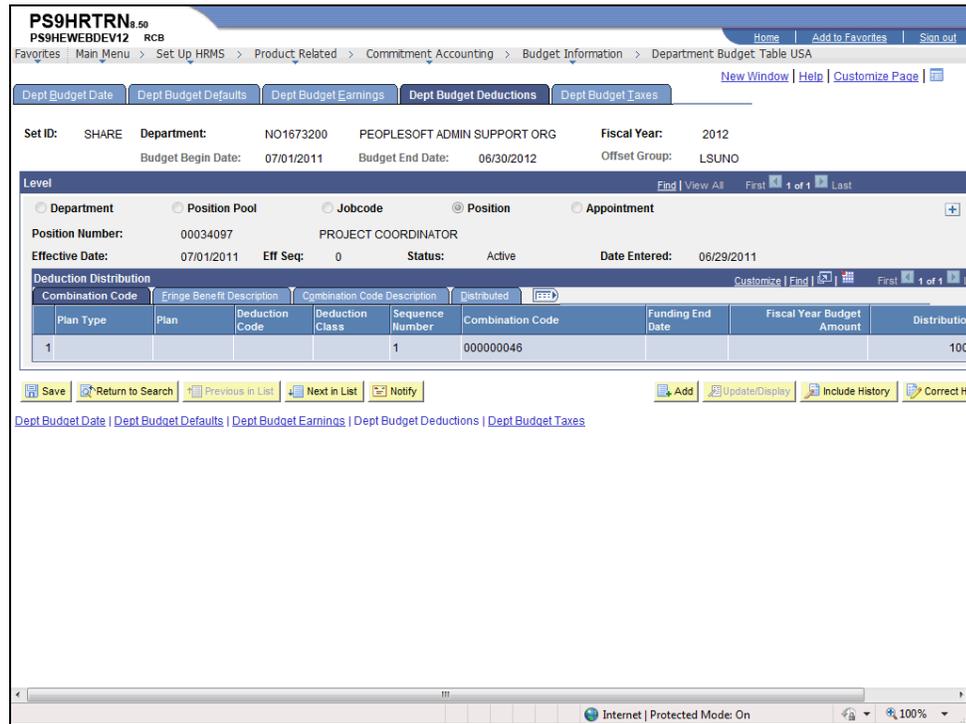
Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
1	1	5673200001-501000			33.333
2	1	967320001A-501000			33.333
3	1	967320002A-501000			33.334

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#) | [Add](#) | [Update/Display](#) | [Include History](#) | [Correct History](#)

[Dept Budget Date](#) | [Dept Budget Defaults](#) | [Dept Budget Earnings](#) | [Dept Budget Deductions](#) | [Dept Budget Taxes](#)

Done Local intranet | Protected Mode: Off 100%

Step	Action
12.	Click the Dept Budget Deductions link. 



Step	Action
13.	Click the Fringe Benefit Description link. 
14.	Click the Dept Budget Taxes tab. 

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Home | Add to Favorites | Sign out

Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

[New Window](#) | [Help](#) | [Customize Page](#) |

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Set ID: SHARE Department: NO1673200 PEOPLESOFT ADMIN SUPPORT ORG Fiscal Year: 2012
Budget Begin Date: 07/01/2011 Budget End Date: 06/30/2012 Offset Group: LSUNO

Level
 Department Position Pool Jobcode Position Appointment Find | View All First 1 of 1 Last

Position Number: 00034097 PROJECT COORDINATOR
Effective Date: 07/01/2011 Eff Seq: 0 Status: Active Date Entered: 06/29/2011

Tax Distribution
Customize | Find | First 1-3 of 3 Last

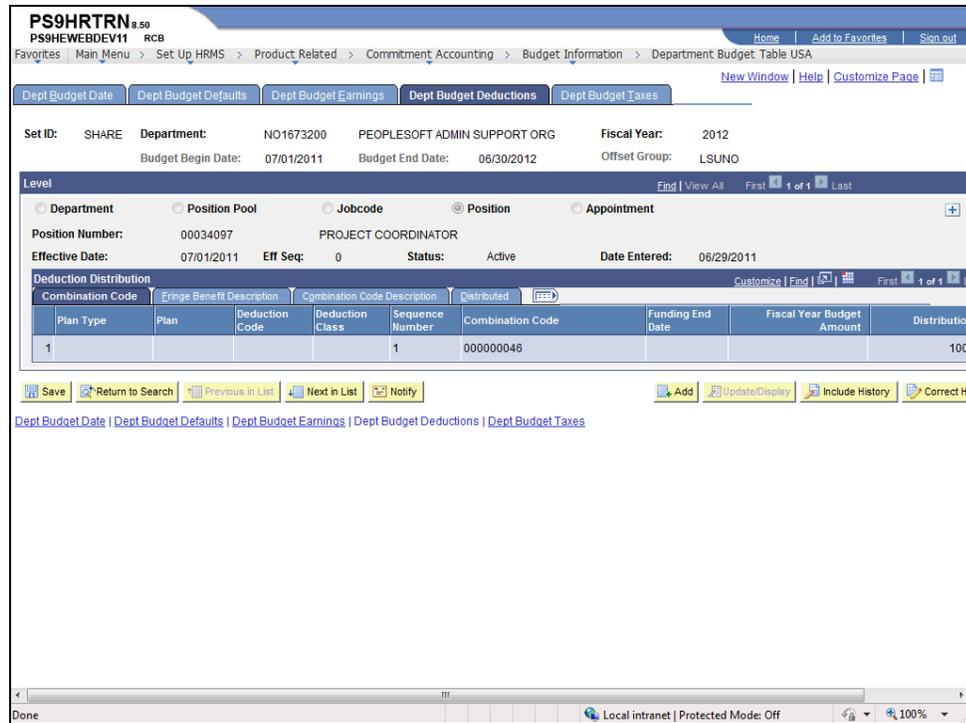
State	Tax Class	Locality	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
1			1	000000048			100.000
2 SU	OASDI/ER		1	000000045			100.000
3 SU	Med/ER		1	000000044			100.000

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#) | [Add](#) | [Update/Display](#) | [Include History](#) | [Correct History](#)

[Dept Budget Date](#) | [Dept Budget Defaults](#) | [Dept Budget Earnings](#) | [Dept Budget Deductions](#) | [Dept Budget Taxes](#)

Done Internet | Protected Mode: On 100%

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



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Home | Add to Favorites | Sign out

Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

[New Window](#) | [Help](#) | [Customize Page](#) | [...](#)

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | **Dept Budget Deductions** | Dept Budget Taxes

Set ID: SHARE Department: NO1673200 PEOPLESOFT ADMIN SUPPORT ORG Fiscal Year: 2012
Budget Begin Date: 07/01/2011 Budget End Date: 06/30/2012 Offset Group: LSUNO

Level: Department Position Pool Jobcode Position Appointment Find | View All First 1 of 1 Last

Position Number: 00034097 PROJECT COORDINATOR
Effective Date: 07/01/2011 Eff Seq: 0 Status: Active Date Entered: 06/29/2011

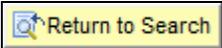
Deduction Distribution Customize | Find | [...](#) First 1 of 1 Last

Plan Type	Plan	Deduction Code	Deduction Class	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution
1				1	000000046			100

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct H

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Done Local intranet | Protected Mode: Off 100%

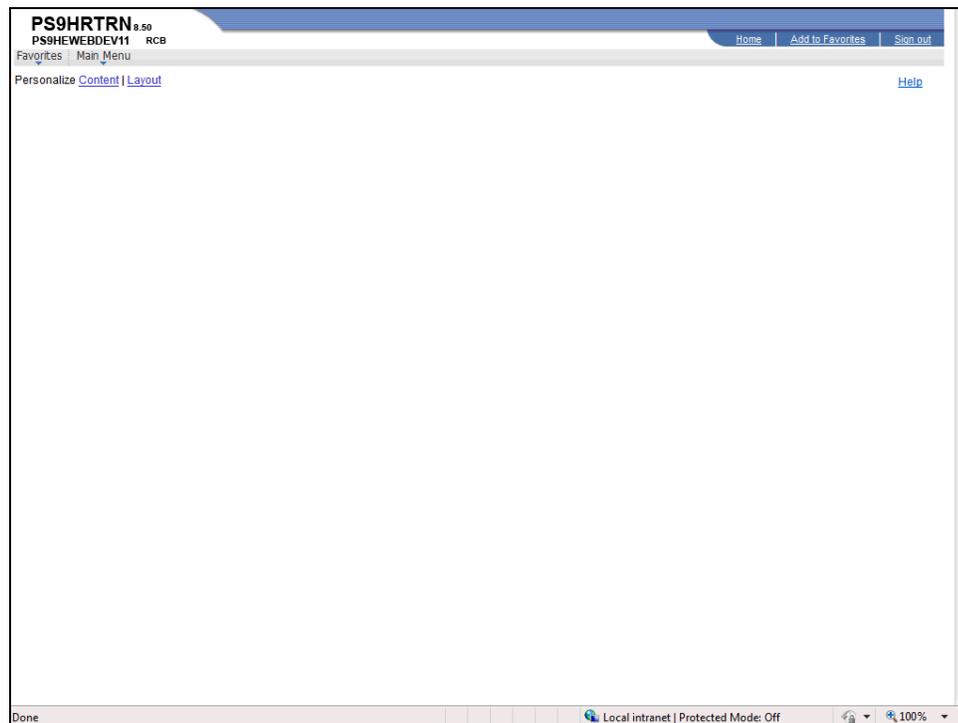
Step	Action
18.	Click the Return to Search button. 
19.	This completes <i>View Department Budget Tables - LSUNO</i> . End of Procedure.

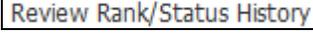
Faculty Tenure

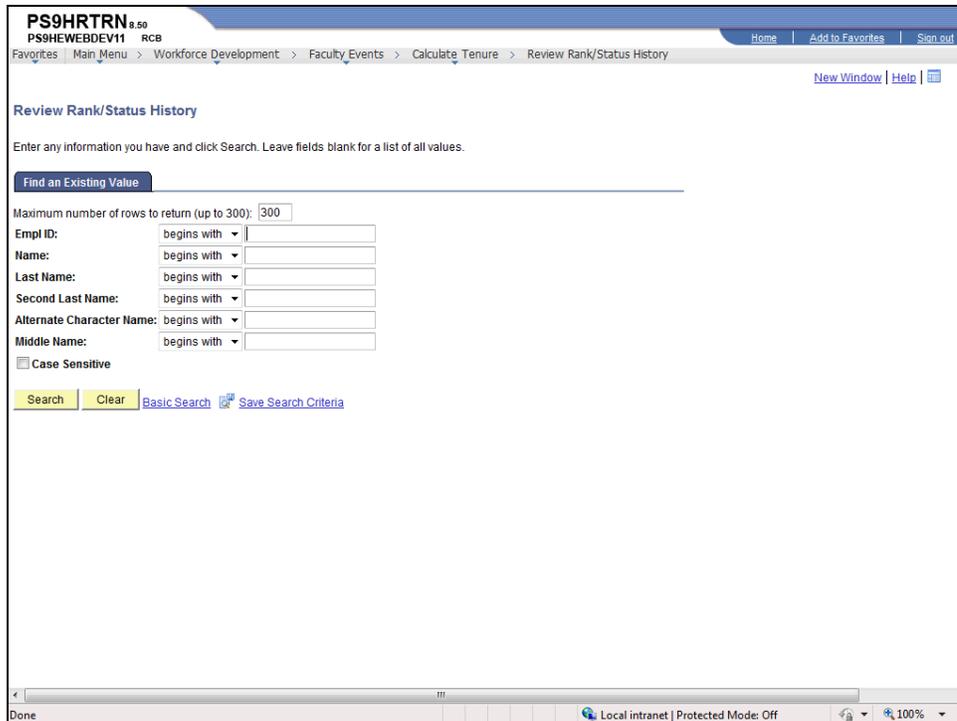
View Faculty Tenure

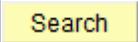
Procedure

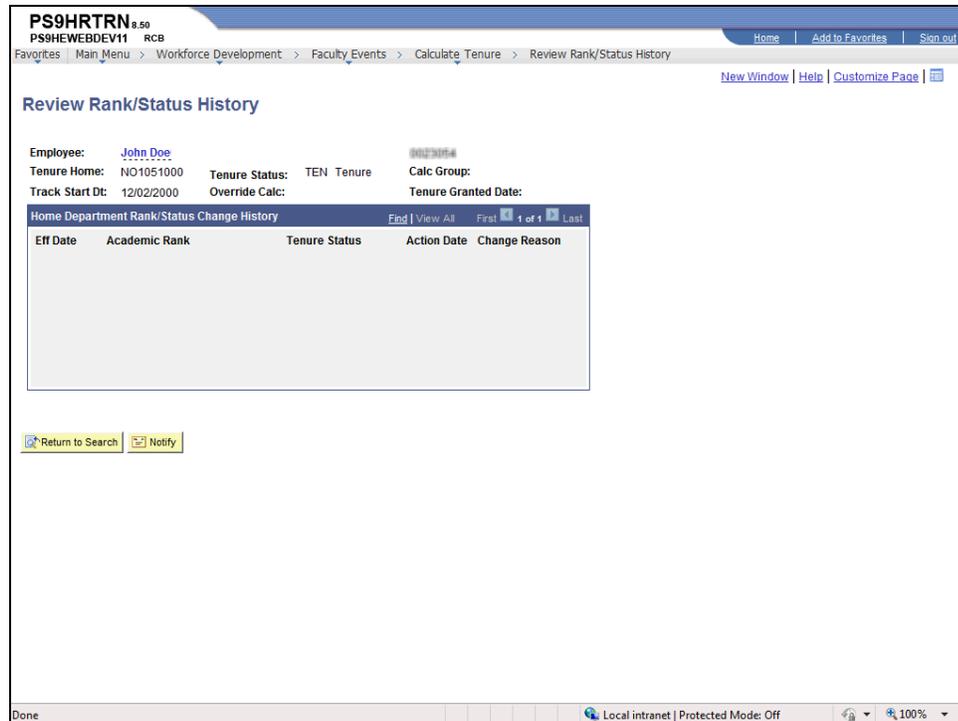
In this topic you will learn how to **View Faculty Tenure**.



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



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



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.