

PeopleSoft Training

Human Resources Manager Inquiry 9.1 - LSUSH

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Table of Contents

Human_Resources_Manager_Inquiry_HR_9_1_LSUSH.	1
Workforce Administration	
View Personal Data	1
View Job Data	
View a Job Summary	
Benefits	
Review Accrual Balances	
Review Employee Data Summary	
Payroll for North America	
Review Paycheck Summary	
Review Actuals Distribution	
Review Additional Pay	
Organizational Development	
Manage Positions	
Enterprise Learning	
Review Training Summary	63
Budget Information	
View Department Budget Table - LSUSH	



Human_Resources_Manager_Inquiry_HR_9_1_LSUSH

Workforce Administration

Workforce Administration

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

View Personal Data

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





Procedure

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

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



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



4	Biographical Details Fields:
	Person ID - This is the same as EmplID.
	Effective Date - The date the action begins (i.e. employee becomes "active" within the system).
	Format Type - Displays the name format currently used for this name type.
	View Name - View name format and any name changes that have occurred.
	Date of Birth - Age is shown in years and months based on date displayed in this field.
	Waive Data Protection - Allows employee to choose to have home address and telephone number held confidential.
	Highest Education Level - The highest degree earned by the employee and on record in Human Resources.
	As of: - The date the action begins.
	Alternate ID - Not in use at this time
	Country - Is the country of the employee's National ID.
	National ID Type - Is always Social Security Number.
	National ID - Is always the employee's Social Security Number or the employee's National ID.
	Primary ID - Indicates the primary National ID number to use for an employee.



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



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Step	Action
10.	Click the OK button.



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



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



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



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



Ø	Regional Fields:
	Person ID - This is the same as the EmplID.
	Regulatory Region - Is always the USA option. Controls the Ethnic Group values within the system.
	Ethnic Group - The federally mandated group defining the individual's ethnicity.
	Primary - Indicates primary ethnicity of employee.
	Effective Date - The date the employee's status becomes effective within the system.
	Military Status - Describes the employee's current Military Status.
	Citizenship (Proof 1 and 2) - Identifies documents used for I-9 verification.
	Eligible to Work in U.S. - Indicates if the employee has the proper documentation needed to work within the United Sates.
	Smoker - Indicated whether the employee is a smoker for life insurance purposes.
	As of - Effective date of employee's smoker status.

Step	Action
16.	This completes <i>View Personal Data</i> . End of Procedure.





View Job Data

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

Procedure

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

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



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







Job Information page if the employee is participating in a Training Series. The job title on the Job Information tab is the official job title for the employee.
Position Management Record - Field not used by HCSD at this time. Regulatory Region - Will always be USA.
Company - 001 LSUHSC New Orleans 002 LSUHSC Shreveport 003 LSUHSC Hospitals
Business Unit - EACMC E. A. Conway Medical Center EKLMC Earl K. Long Medical Center HCSDA HCSD Administration HPLMC Huey P. Long Medical Center LAKMC Lallie A. Kemp Medical Center LJCMC Leonard J. Chabert Medical Center LSUNO LSUMC Medical Center MCLNO Medical Center of LA New Orleans UMCLA University Medical Center WOMMC W. O. Moss Medical Center WSTMC Washington-St. Tammany Medical Center
Department - The Department ID.
Department Entry Date - Date on which employee is assigned to a specific department
Location - The department location.
Establishment ID - Is not used at this time.

Date Created - The date the record was entered.



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



Job Information Tab Fields:
Effective Date - Date the action begins.
Effective Sequence - The method used to input multiple job actions on the same date. The first action is 0, the second is 1, etc.
Job Indicator - Defaults over form the Work Location panel.
Action/Reason - Defaults from the Work Location panel.
Job Code - The Civil Service (6 digits) or LSU System (3 digits) numeric code related to an employee's position title. Is the official job title for the employee.
Entry Date - Defaults in from the Job Code entry.
Supervisor Level - Field is not used by HCSD at this time.
Supervisor ID - The Person ID (EmpIID) of the individual to whom the employee reports. This field is optional for HCSD.
Reports To - The position number of the person to whom the employee reports. This field is optional for HCSD.
Regular/Temporary - Indicates whether the individual is a regular or temporary employee.
Full/Part - Indicates whether the individual is a full-time or part-time employee.
Empl Class - Indicates the class status of the employee based on specified codes. A partial list is provided below: 1 Year Trm 2 Year Trm 3 Year Trm 4 Year Trm Agency/Tmp Ann No Ten Grd No Ten Indf No Tn Job Mult Rest Permanent Probation Provision Resident Rest Appt



Student Tenured Transient Unclass Officer Code - Will default as NONE always. **Regular Shift** - Field will default to N/A. Shift Rate - Field will remain blank. Classified Indc - Ties the employee's job data to a classification. A partial list is provided below: Classified Faculty **Graduate Assistant House Officer** Fellow **Gratis Employee** Student Temporary Unclassified Shift Factor - Will remain blank. Standard Hours - Relates to the number of hours an employee is assigned to work per week and is calculated based on the FTE (Full-time = 40 hours and Part-time = 20 or 30 hours). Work Period - Time period in which Standard Hours are completed. **FTE** - Full-time Equivalent Adds to FTE Actual Count - Will default from Position Record. If not, should be checked for HCSD. Encumbrance Override - Will remain unchecked at all times. Contract Number - Field is not used by HCSD at this time. **Contract Type** - Field is not used by HCSD at this time.





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

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



Ø

Payroll Tab Fields:

Pay Group - Defines a set of employees (with similar characteristics of pay) for payroll processing. A partial list of valid Pay groups is below: LSUNO: **GR1** - Gratis New Orleans NBD – To Be Determined NBE – New Orleans Biweekly Exempt NBN - Biweekly Non-Exempt NBR – Residents (New Orleans) **NBS** – New Orleans Students **NBT** – Transients/Restricted **NMF** – Full-time Faculty Staff (New Orleans) NMG – Graduate Assistants (New Orleans) **NML** – Fellows (New Orleans) NMP - Part-time Faculty/Staff (New Orleans) NMS - New Orleans Stipends **NRT** – New Orleans Retirees HCSD: Note: The first letter in the Pay Group denotes the Business Unit. **H** – Headquarters E – EKLMC K-LAKMC L - LJCMCU-UMCLA T-WSTMC W-WOMMC $\mathbf{P} - HPLMC$ Note: The example Pay Group begin with "H" – HCSD. HBN - Non-Exempt w/benefit HBS - Students HBU – Temporary/Unclass/Restric HBW - Exempt & Unclass/Restric HMT – HCSD Monthly HTE – Retiree Holiday Schedule - Indicates the holiday schedule that an employee is on. A list is provided below: HCS - Health Care Srvs Div NOC (New Orleans) - Classified, Civil Service Employee NHS (No Holiday Schedule) - Unclassified employees. The holiday schedule is built into their base salary and the holiday schedule is not indicated. (This does not apply to HCSD). However, for HCSD Transients or Pool employees, Students and Restricted Appointments are not eligible for any



Employee Type - Denotes whether an employee is Hourly (H) or Salary (S). For HCSD, the only salaried employees are monthly unclassified.
Tax Location Code - Is always Louisiana.
FICA Status - Indicates whether an employee is subject to:

Medicare and Social Security
Medicare only
Exempt from paying Medicare or Social Security.

GL Pay Type - Field is not used by HCSD at this time.
Pay Template - Defines the following:

Overtime status (PPM codes of 0, 1, or 2)
Special Pays (shift, premium pay, weekend)
Payment of holiday differential.

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

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



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

Compensation Tab Fields:

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

Frequency - How often the employee is paid.

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





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







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

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

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

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

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

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



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





View a Job Summary

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

Procedure

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

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





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

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



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




Benefits

Review Accrual Balances

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

Procedure

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

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	Help

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





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Search Clear Bas	ic Search [2] ⁸ Save Search Criteria	
1		

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



Ø **Leave Accrual Balances Fields:** Company – 01 – New Orleans; 02 – Shreveport; 03 - HCSD Benefit Program – benefit program to which employee is assigned Plan Type – refers to type of leave used Currency - National monetary denomination in which the employee's compensation is paid. Accrual Date - The leave process date (e.g. the date the employee earns leave, which is the payroll end date). For Classified Employees, this date will be the date of the last pay period. For Unclassified Employees, this date will be a month before the date of the last pay period. Accrual Balances - Hours: Hours shown are " as of " the calendar year not the fiscal year. Carried Over from previous year - The accrued leave from the previous calendar year. Earned Year-to-Date - The amount of leave earned for the calendar year. Taken Year- to -Date - Indicates the leave hours taken for the calendar year. Adjusted Year-to-Date - Shown if an adjustment has been made (e.g. if payroll runs and leave was not included in the run). **Bought Year-to-Date** – N/A Sold Year-to-Date - N/A Service Data: Service Date - Also called the Adjusted Service Date. It is the most important date because this is the leave accrual date; the date the employee begins to earn leave (leave accrual date). Service Hours - The number of hours used for length-of-service calculations when the service unit is defined as Hours. Unprocessed Data: Will be shown when HR enters Dept. Leave (taken leave or adjusted leave). Once payroll runs, the leave will be shown as processed (Taken Year-to-Date or Adjusted Year-to-Date) and the Unprocessed Data field will be blank.

Hours Taken – Number of hours used.



Hours Adjusted – Unprocessed hours.

Hours Bought – N/A

Hours Sold – N/A

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

Accrual Total:

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

Hours Value - Current monetary value of the hours balance.



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eave Accruals			Find View 100 First	🛯 1 of 116 🍱 Last	
Company: 001 LSUHSC-Ne	w Orleans		FTP Full/Temp/Part-time		
Plan Type: Sick Accrual Date: 11/30/2011		Currency:	USD		
Accrual Balances - Hours		Service Data			
Carried over from previous year:	398.000000	Service Date:		02/12/2007	
Earned Year-to-Date:	110.000000	Service Hours:		10,193.640	
Taken Year-to-Date: Adjusted Year-to-Date:	2.500	Unprocessed Data	a		
Bought Year-to-Date:		Hours Taken:			
Sold Year-to-Date:					
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Accrual Totals Hours Balance: Hours Value:		Hours Bought: Hours Sold:			
Accrual Totals Hours Balance: Hours Value:		Hours Bought: Hours Sold:			

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



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Hours Balance: 505 50000 Hours Value: 14.821.45 Samice Rours:	Accrual Totals			0	
Hours Value: 14,621.45 Service Hours:				0	
				[]	
Return to Search 🗹 Toofy		Service nours.		C	
	😰 Return to Search 还 Notify				

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



Review Employee Data Summary

Procedure

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

PS9HEWEBDEV11 RCB	Home Add to Favorites Sign of
avorites Main Menu	
ersonalize Content Layout	Help

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



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



view HR/Job/Pay					
ployee Summary Data	EMP	ID:	Empl Record:	0	
	C	10.	Emprilia Conta	•	
Payroll Status:	Active				
lenefits Employee Status:	Active				
ull/Part Time:	Full-Time				
egular/Temporary:	Regular				
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Vork Period:	Weekly				
ay Group:	Full-time FacultyStaff (Ne	w Or			
ompany:	LSUHSC-New Orleans				
mployee Type:	Salaried				
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ob Code:	245 COORDIN	ATOR OF NON-ACADEMIC C	R		
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Country: USA	NID Type: PR :	SSN National ID:	110-11-5343		
Gender:	Male				
larital Status: Main Cor	ntent)				
ignificant Dates	iten i				
irst Start Date:	02/12/2007	Service Date:	02/12/2007		
ompany Seniority Date:	02/12/2007	Last Start Date:	02/12/2007		
ermination Date:		Date of Birth:	01/01/1970		
	02/12/2007	Date of Death:			

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





Payroll for North America

Review Paycheck Summary

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

Procedure

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

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



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



view Paycheck Summary	у		New Window Help Customize
	F Pay Period End: 07/31/2003 Page: :		
rcheck Information ycheck Status: Confirmed we Date: 07/31/2003 Off Cycle Reprint A	Paycheck Option: Check Paycheck Number: 183049 Adjustment Corrected Cashed	Paycheck Totals Earnings: 860.21 Taxes: 12.47 Deductions: 68.82 Net Pay: 778.92	
arnings eductions axes			
	Next in List		

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





Review Actuals Distribution

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

Procedure

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



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



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



Review Additional Pay

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

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

Procedure

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

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ralize <u>Content Layout</u>	
alize Content Layout	Н

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



B Payroll for North America -> Employee Pay Data USA -> Create Additional Pay	Home Add to Favorites Sign ou
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Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7 - digit Employee ID Number ".
6.	Click the Search button.



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Step	Action
7.	Click the Expand button for the Job Information section.
8.	Click the Collapse button for the Job Information section.
9.	Click the Expand button for the Tax Information section.
10.	Click the Collapse button for the Tax Information section.
11.	This completes <i>Review Additional Pay</i> . End of Procedure.





Organizational Development

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

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

Manage Positions

Procedure

In this topic you will learn how to Manage Positions.

PS9HEWEBDEV11 RCB Favorites Main Menu	Home Add to Favorites Sign ou
Personalize Content Layout	
Personalize Content Layout	Help

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



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

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Enter any information you have	e and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	Add a New Value	
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Job Code:	begins with 👻 🔍	
Reports To Position Number	begins with 👻	
Include History Corr	ect History 🔲 Case Sensitive	
Search Clear Bas	ic Search 👹 Save Search Criteria	
Find an Existing Value Add	New Value	

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



PS9HRTRN	Home Add to Favorites
PS9HEWEBDEV11 RCB vorites Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info	Home Add to Pavorites
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escription Specific Information Budget and Incumbents Position Attribute	
tosition Information Eind View All First 🚺 1 of 1 🛄 Last	
Position Number: 00034097	
Headcount Status: Overallocated Current Head Count: 2 out of 1	
Effective Date: 05/11/2012 0 *Status: Active •	
Reason: XFR Transfer Action Date: 05/09/2012	
Position Status: Approved V Status Date: 08/01/2001 🗗 🔤 Key Position	
Job Information	
Business Unit: LSUNO & LSUMC New Orleans	
Job Code: 264 Q PROJECT COORDINATOR	
*Reg/Temp: Regular • *Full/Part Time: Full-Time •	
Regular Shift: N/A 👻 Union Code:	
Title: PROJECT COORDINATOR Short Title: PROJECT CO Detailed Position Description	
Work Location	
Region: USA Q United States	
"Department: NO1673000 Q Company: 001 LSUHSC-New Orleans	
*Location: 488150001 Q	
Reports To: 00019860 🔍 Dot-Line:	
Supervisor Lvi: Security Clearance:	
Salary Plan Information	
Salary Admin Plan: UNC & Grade: Step:	
Standard Hours: 40.00 Work Period: W & Weekly	
Mon Tue Wed Thu Fri Sat Sun	
8.00 8.00 8.00 8.00	
FLSA Status: Nonexempt Bargaining Unit: 88888	
Updated on: 05/09/2012 2:43:11PM Updated By: CHAROL John Doe0119363	
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scription Specific Information Budget and Incumbents Position Attribute	

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



Description Tab: L) Position Number - An auto-assigned number. Every employee is given a Position Number. Headcount Status - Indicates whether or not an employee holds the position (Filled). Current Head Count - The number of people currently in the position. Effective Date - Shows the data an action/reason begins. An effective date of 1901 indicates this information was brought over during the conversion to PeopleSoft. Status - Refers to the position not the employee. **Reason -** What occurred to the position (e.g. to track history). Action Date - The date of input of the action. **Position Status** – Indicates if a position has been approved for hire. Status Date - Date the action began. Key Position - N/A Dot-Line - Is not used at this time. Security Clearance - Is not used at this time.



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ites : Main Menu > Organizational Development > Positi	on Management -> Maintain Positions/Budgets -> Add/Update Position Info	New Window Help Customize Page
ailed Position Description		
ROJECT COORDINATOR	19	
K Cancel		

Step	Action
9.	Click the OK button.



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ortes Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info	New Window Help Customize Page
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sition Information End View All First 🚺 1 of 1 🔽 Last	
osition Number: 00034097	
eadcount Status: Overallocated Current Head Count: 2 out of 1	
ffective Date: 05/11/2012 🕫 *Status: Active -	
eason: XFR A Transfer Action Date: 05/09/2012	
Position Status: Approved Status Date: 08/01/2001 Key Position	
ob Information	
Business Unit: LSUNO S LSUMC New Orleans	
Job Code: 284 Q PROJECT COORDINATOR	
Reg/Temp: Regular	
Regular Shift: N/A 👻 Union Code: 🔍	
Title: PROJECT COORDINATOR Short Title: PROJECT CO	
Vork Location	
Reg Region: USA Q United States	
Department: NO1673000 Company: 001 LSUHSC-New Orleans	
Location: 488150001 Q	
Reports To: 00019860 Q Dot-Line:	
Supervisor Lvt: Security Clearance:	
Salary Plan Information	
Salary Admin Plan: UNC Grade: Step: Q	
Standard Hours: 40.00 Work Period: W Q Weekly	
Mon Tue Wed Thu Fri Sat Sun 8:00 8:00 8:00 8:00 8:00	
FLSA Status: Nonexempt Bargaining Unit: 8888	
Jpdated on: 05/09/2012 2:43:11PM Updated By: CHAROL John Doe0119363	
Save 🔯 Return to Search 🖆 Notify 🔂 Save 🔂 Notify	

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



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	and Development . Develo	tion Management > Maintain Positions/Budgets > Add/Update Position Info	Home Add to Favorites
ices Main Meriu > Organizadi	onal Development > Posto	Joh Management > Mantan Posicions/Budgets > Add/update Posicion into	New Window Help Customize P
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II Drop ID: PCN# 024	18816003	Update Incumbents	
		Include Salary Plan/Grade	
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alth Certificate:	•	Confidential Position	
nature Authority:	•	Available for Telework	
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Step	Action
11.	Click the Budget and Incumbents tab.
	Budget and Incumbents



Ø	Specific Information Tab:
	Position Number - Numerical code assigned to a job.
	Headcount Status – Position type.
	Current Headcount - Current number of employee's within the position.
	Effective Date - Date the action began.
	Status – Whether position is active or inactive.
	Max Head Count - The maximum number of employees who may hold that position at one time.
	Update Incumbents - List of employees currently in position.
	Include Salary Plan/Grade – N/A
	Mail Drop ID - May consist of the Civil Service position number, if applicable. The Civil Service position number is commonly known as the CSO2# or the SAP number. This may not appear on the page. It was used during the transaction from the old legacy system to PeopleSoft.
	Budgeted Position - Job for which monies have been allocated.
	Health Certificate - Document verifying employee is physically and mentally capable of performing job functions.
	Confidential Position – N/A
	Signature Authority - Person given approval responsibility.
	Job Sharing Permitted – Indicates if position can be shared.



Description Spe	cific Informatio	n Budge	t and incumbents	Position A	tribute						New Window Help Customize Pa
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Step	Action
12.	Click the Job Data link to view the job information panel discussed in the Workforce Administration Section.



4	Budget and Incumbents Tab:
	Earnings - The monetary compensation paid to an employee.
	Deductions - Monies subtracted from the employee's earnings for health insurance, life insurance, savings bonds, etc.
	Tax - Levy on employee's net income.
	Cdn Tax -
	Total -
	EmplID - Lists the employee who is currently in the position. If this information is blank, then there is currently not an active employee in the position.

Step	Action
13.	This completes <i>Manage Positions</i> . End of Procedure.



Enterprise Learning

Review Training Summary

Procedure

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



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





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Favorites : Main Menu > 1	Enterprise Learning > Result Tracking	 Review Training Summary 	
			New Window Help
Review Training Sum	mary		
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Step	Action
5.	Enter the desired information into the Empl ID field. Enter " 7 - digit Employee ID Number ".
6.	Click the Search button. Search



Person IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		raining Summary			
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C Return to Search	S0025	FIN MANAGING REQS 7.5			

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





Budget Information

View Department Budget Table - LSUSH

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

Procedure

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

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onalize Content Layout		Help

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



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



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PS9HEWEBDEV11						Home Add to Favorites Sign out
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Balance:	0.00					
balance.	0.00					
Save Return to S	Search Previous in List	Next in List 🔄 Notify	Add Dodate	Display 🔊 Include History 🕞 Correct His	tory	

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



6	Dept Budget Earnings Fields:
	Effective Date - The date the action begins.
	Status - Indicates the Account Code is currently an active or inactive funding source for the position.
	Combination Code - Formerly the Account Code . A valid combination of General Ledger ChartFields. The ChartFields combinations are established in the General Ledger to accurately identify specific funding sources for financial transactions. Combination Codes are used to identify funding sources for the budget.
	Distribution % - The percent of funding allocated to the specified account for the assigned position which the employee holds. The specified accounts may be viewed by clicking on the Earnings Distribution "Scroll Area" . These accounts will be debited each time payroll runs. The Distribution % of all accounts totals 100%. The end-user may click on the Level "Scroll Area" to view the dates that the accounts that were debited.
	NOTE: All of the remaining tabs contained in this component function in the same way.



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Step	Action
13.	Click the Dept Budget Deductions tab. Dept Budget <u>D</u> eductions
14.	This completes <i>View Department Budget Tables - LSUNO</i> . End of Procedure.