PeopleSoft Training

Human Resources Inquiry - LSUNO 9.1

Version Date: March 2013

COPYRIGHT & TRADEMARKS

Table of Contents

Human Resources Inquiry - LSUNO 9.1

Workforce Administration

Workforce Administration

When employees are hired, they must be added into PeopleSoft Human Resources database (PS9HRPRP). Before other Human Resources tasks are initiated, essential employee data including personal, employment, job and benefit-related information must be entered. This is how we begin tracking a complete work history for each employee in our organization. This lesson describes how to navigate to and view pages that are accessible from the Workforce Administration menu.
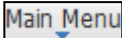
View Personal Data

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

Procedure
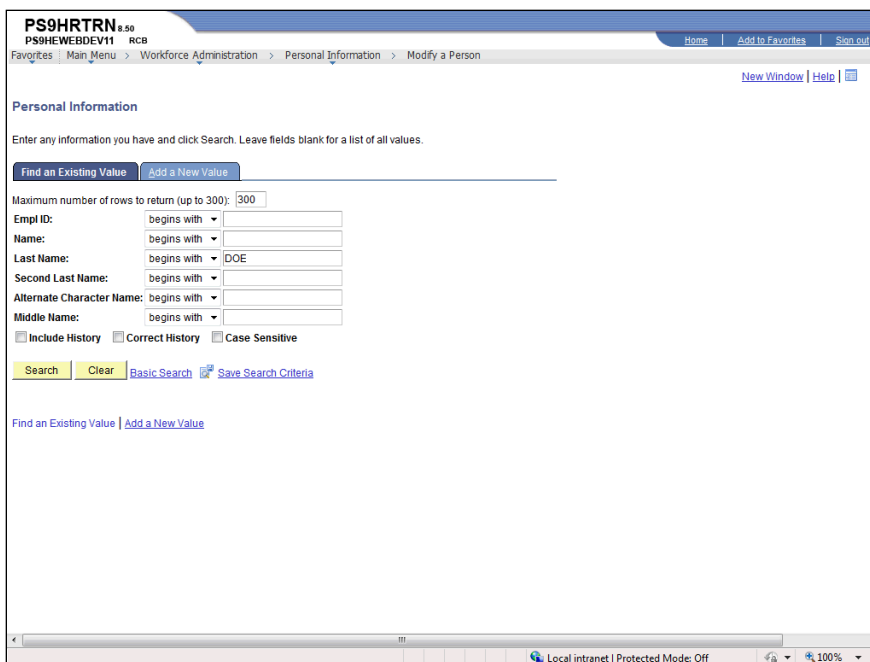
In this topic you will learn how to View Personal Data.
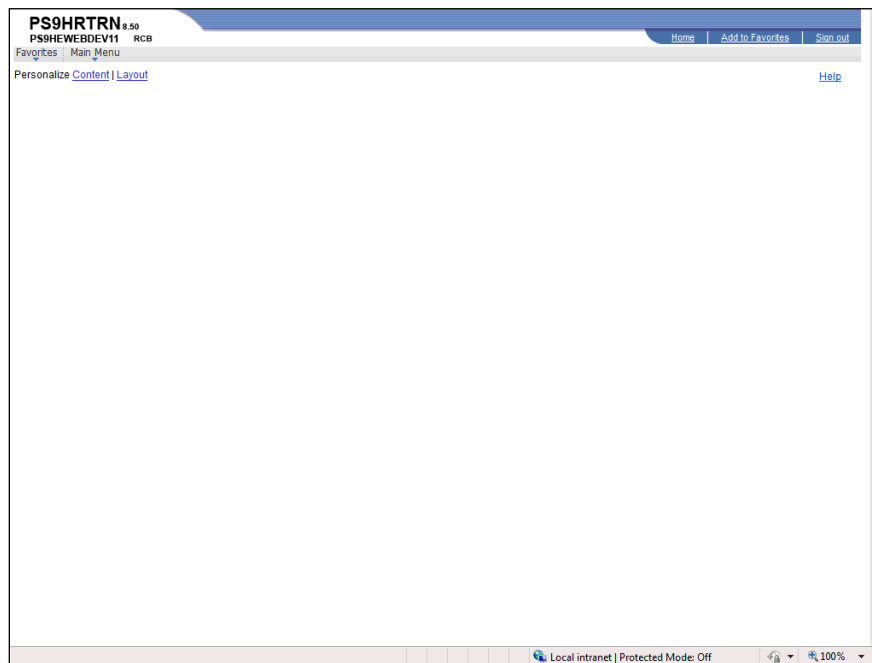
Step	Action
1.	Click the **Main Menu** button.
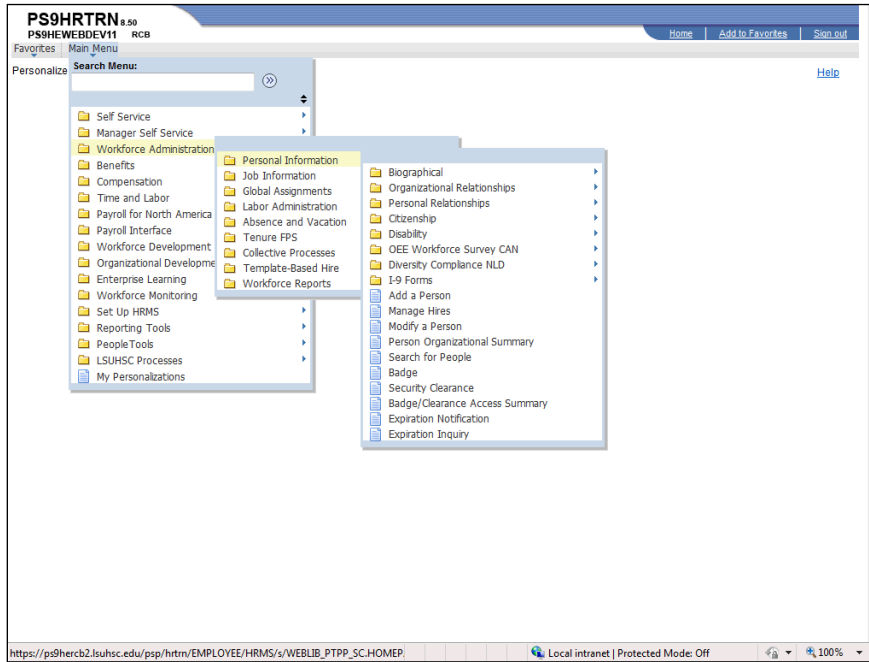
Step	Action
2.	Click the **Workforce Administration** menu > **Personal Information** menu, then click the **Modify a Person** menu.

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

Biographical Details Fields

Person ID - This is the same as Empl ID.

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

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

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

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

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

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

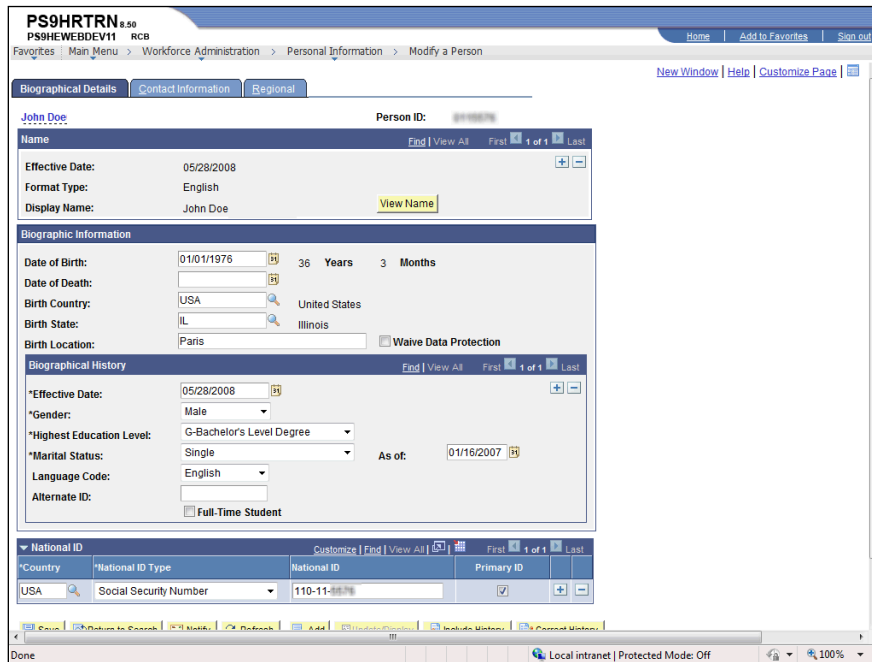**As of:** - the date the action begins.

Alternate ID - Not in use at this time.

Country - Is the country of the employee's National ID
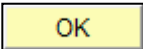
National ID Type - Is always Social Security Number.
National ID - Is always the employee's Social Security Number or the employee's National ID.

Primary ID - Indicates the primary National ID number to use for an employee.
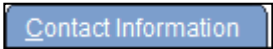
Step	Action
6.	Click the **View Name** button. ![View Name]
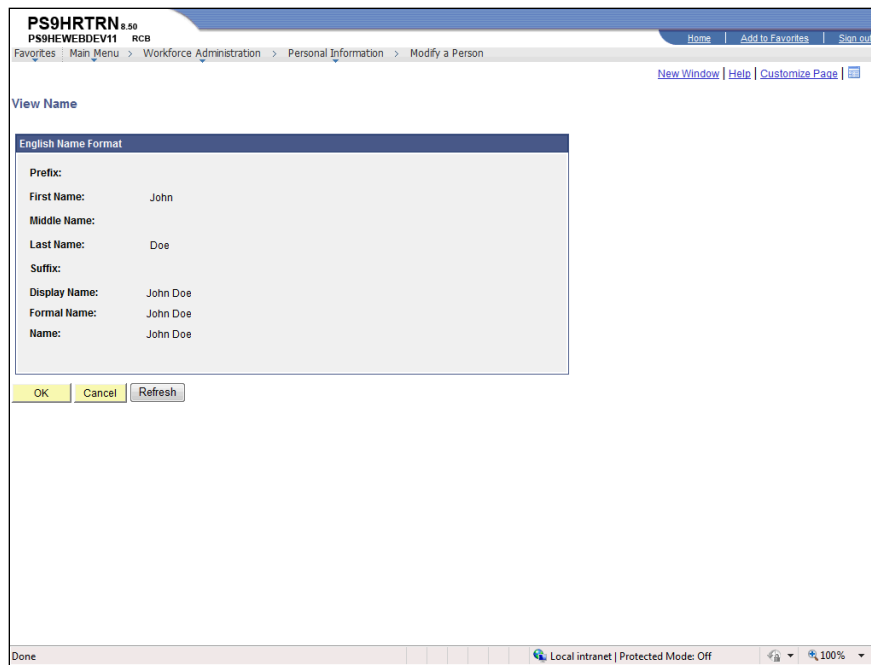
Step	Action
7.	Click the **OK** button.
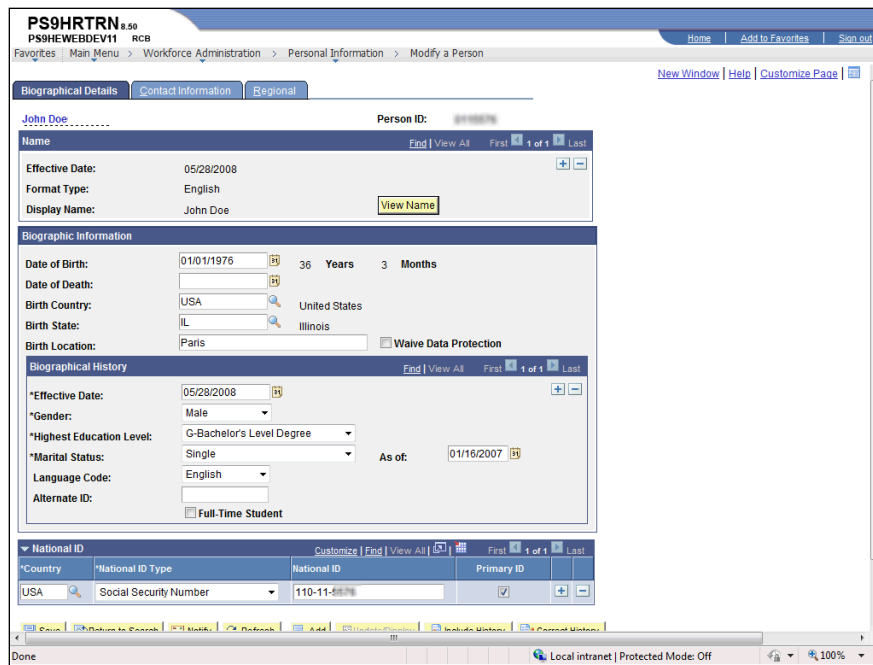
Step	Action
8.	Click the **Contact Information** tab. ![Contact Information]
9.	View the Contract Information panel.

Contact Information Fields

Person ID - Is the same as Empl ID.

Address Type - Home is the defaulted type.

As of Date - This is the effective date of any address change.

Status - Indicated whether the employee is "active" or "inactive" within the system.

Preferred - Indicates the telephone number/e-mail address that the employee prefers to be used to contact him/her.

Email Type - Identifies various e-mail addresses at which the employee can be contacted.

Email Address - The e-mail specified in the Global Address book will default for the employee.

Step	Action
10.	Click the **View Address Detail** link. View Address Detail
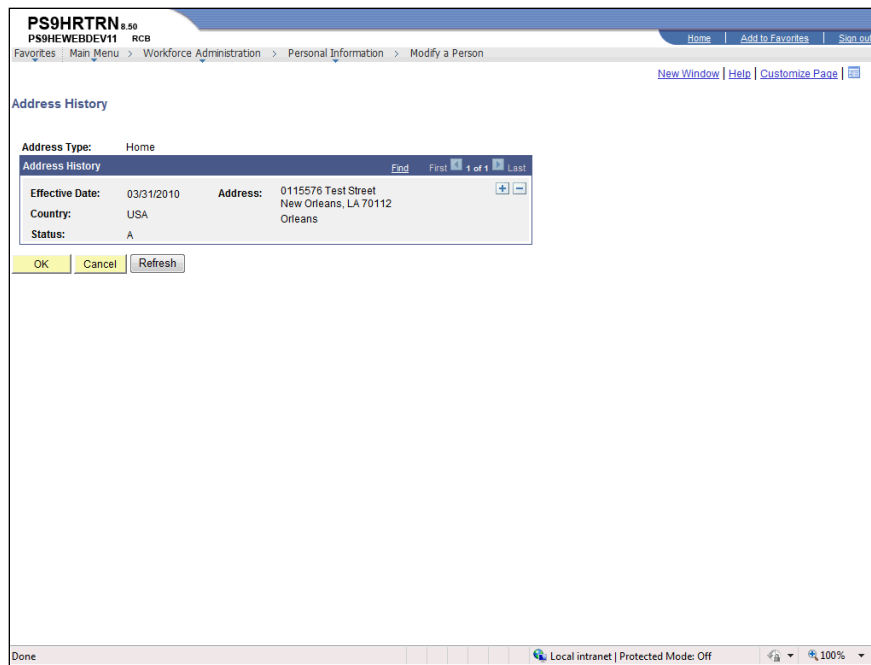
Step	Action
11.	Click the **OK** button.
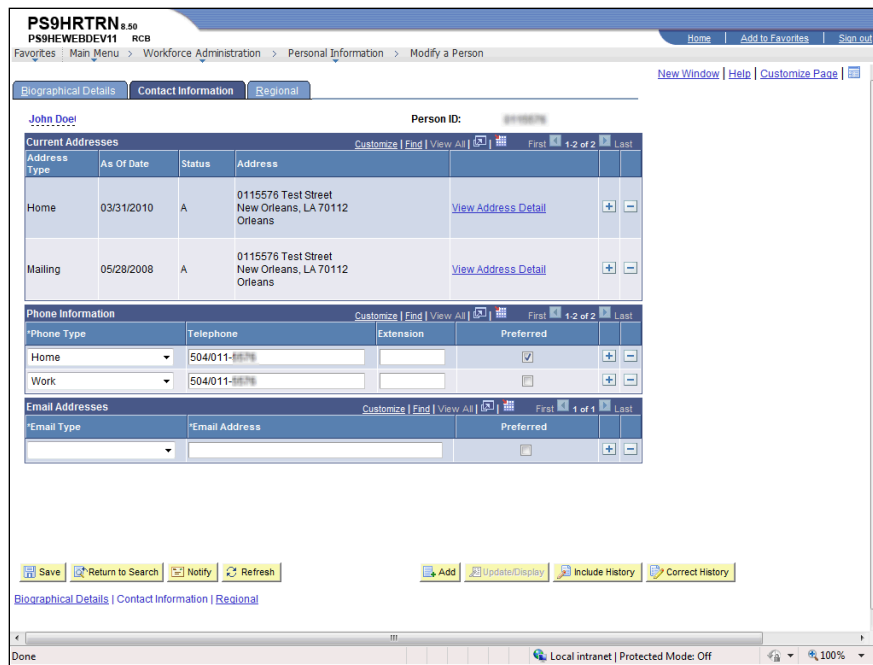
Step	Action
12.	Click the **Regional** tab. Regional
13.	View the Regional panel.

Regional Detail Fields

Person ID - This is the same as the Empl ID.

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

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

Primary - Indicates primary ethnicity of employee.

Effective Date - The date the employee's status becomes effective within the system.
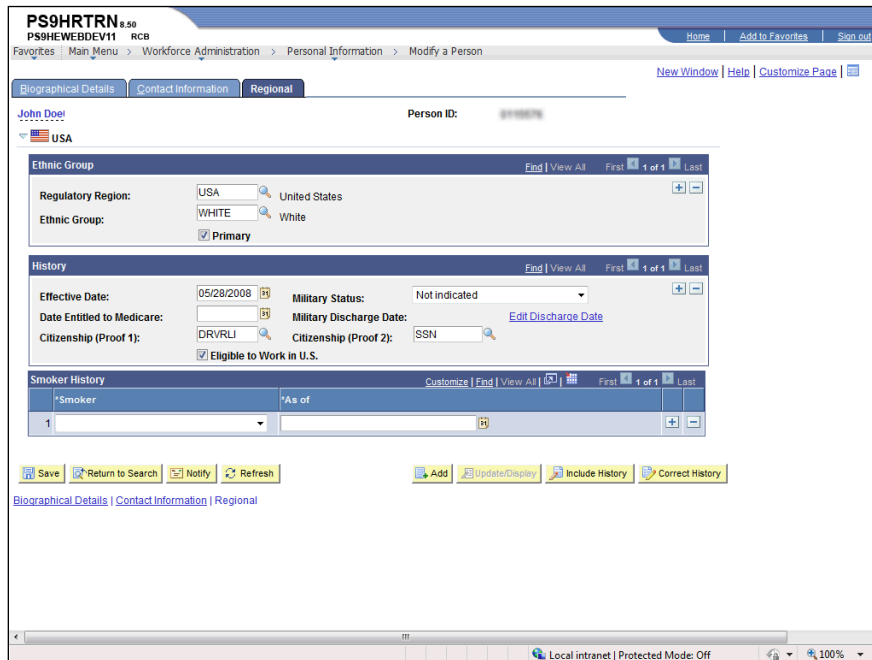
Military Status - Describes the employee's current Military Status.

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

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

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

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

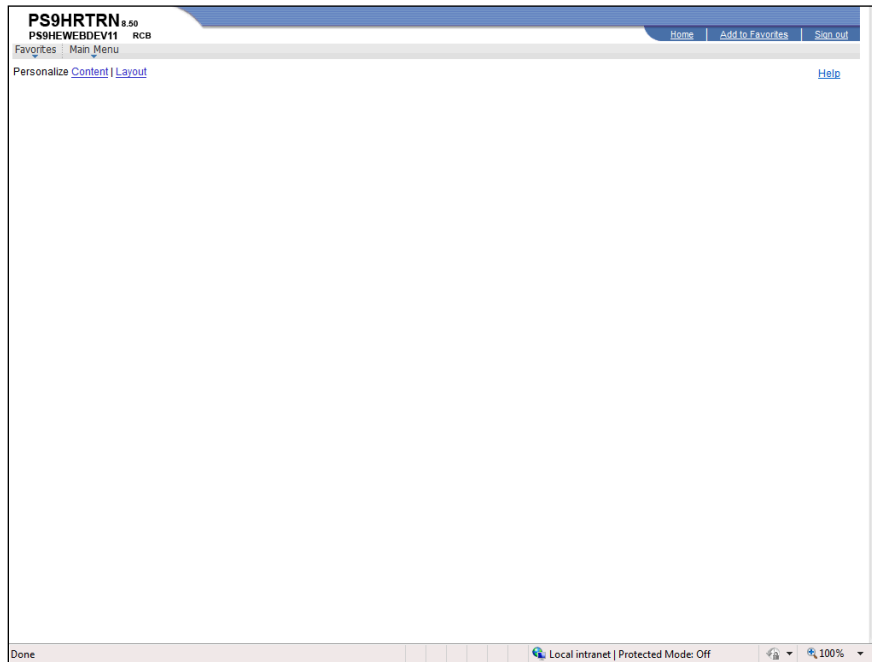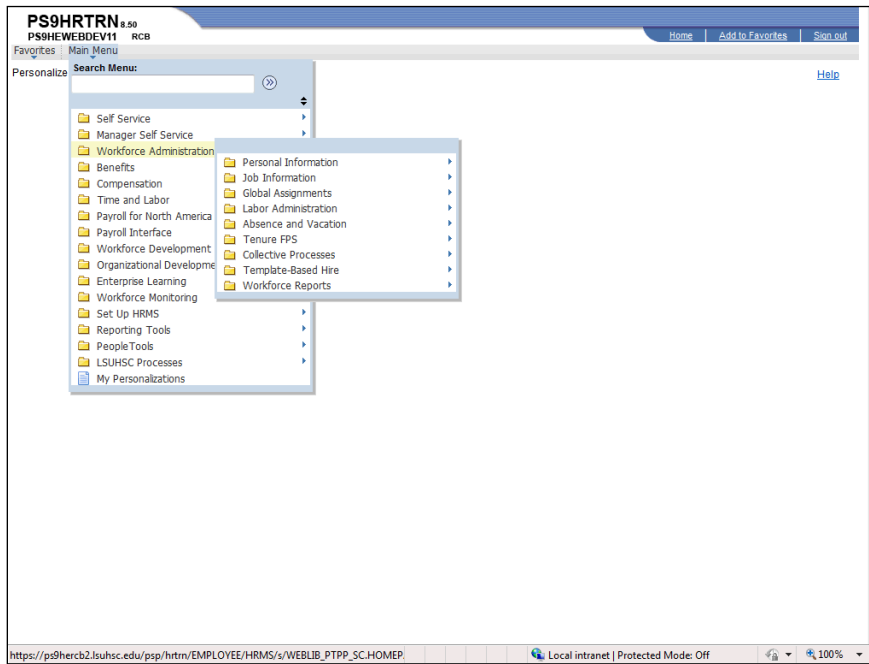| Step	Action
14.	Click the Home link to return to the main menu.
15.	This completes the View Personal Data topic. **End of Procedure.**

View Job Data

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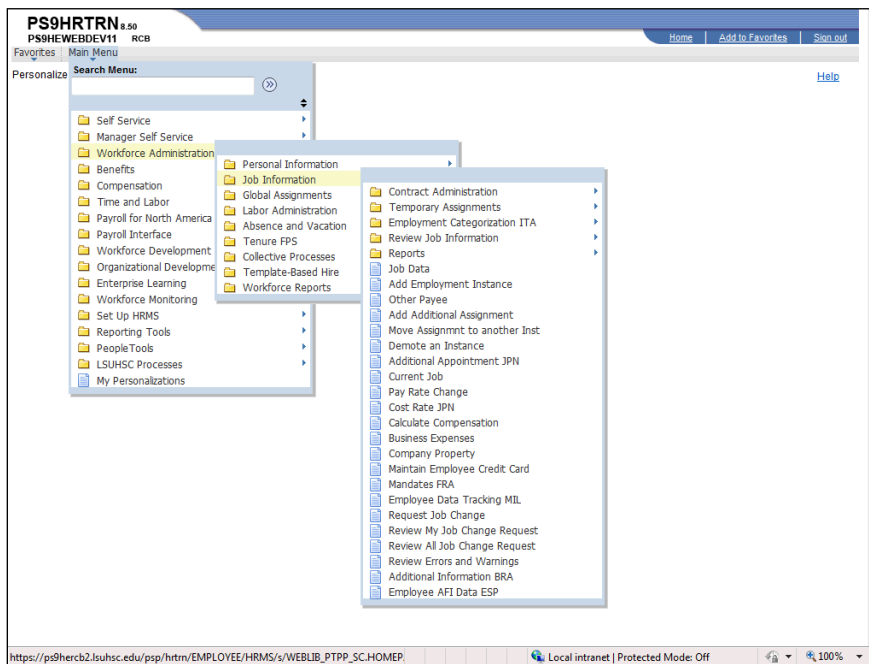
Procedure

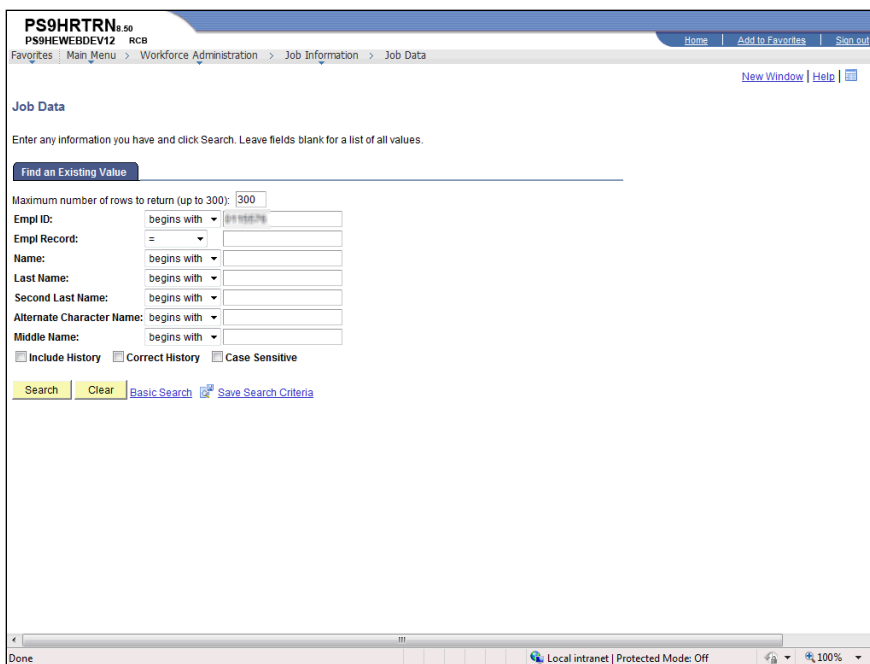In this topic you will learn how to View Job Data.

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

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

Step	Action
3.	Click the **Job Data** page.

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

Work Location Tab Fields

ID - Is an auto-assigned number.

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

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

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

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

Effective Date - The date the action began.

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

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

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

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

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

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

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

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

Academic Rank - Applies only to faculty.

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

Work Location Tab Fields   (continued)

Position Number - Is the number assigned to the specific position the employee is filling. Every employee is given a position number. The defaulting job title may differ from the Job Code on the Job Information page if the employee is participating in a Training Series. The job title on the Job Information tab is the official job title for the employee.

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

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

Business Unit - **EACMC** E. A. Conway Medical 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
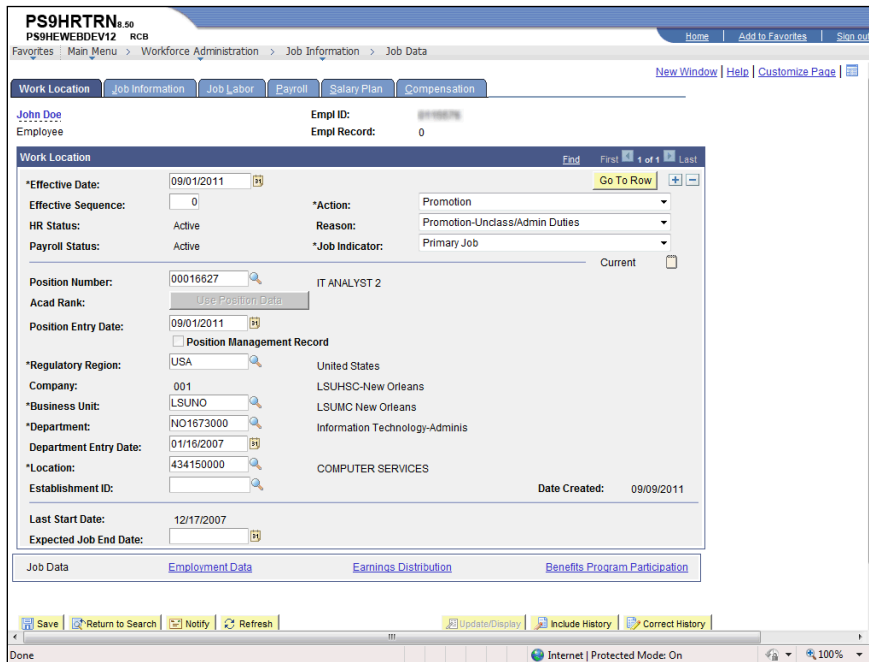
Department - The Department ID.

Department Entry Date - Date on which employee is assigned to a specific department
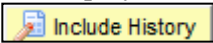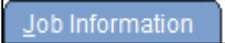
Location - The department location.
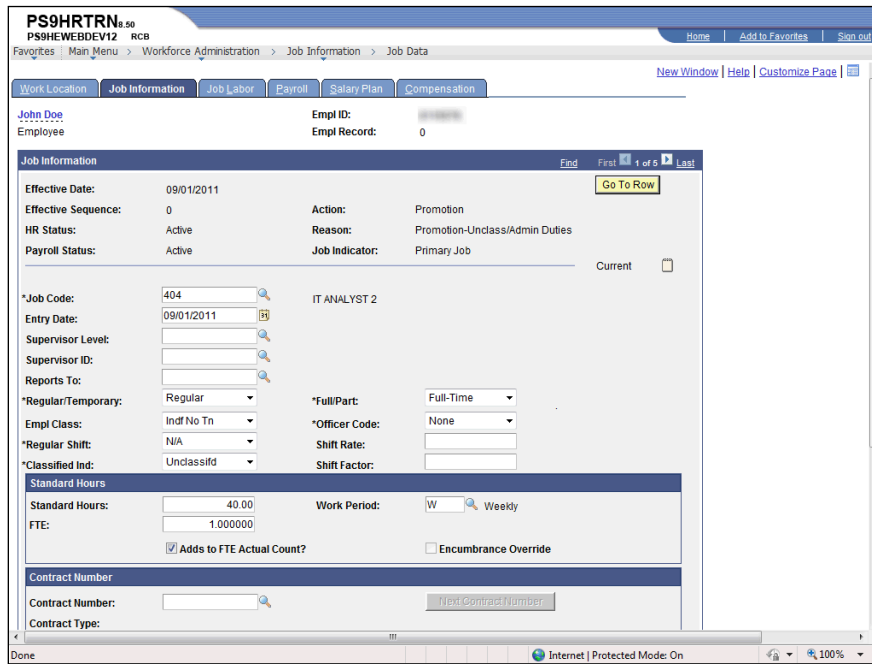
Establishment ID - Is not used at this time.

Date Created - The date the record was entered.

Step	Action
6.	Click the **Include History** button to view past Job Data information associated with this employee. ![Include History]
7.	Click the **Arrow** buttons to navigate to additional rows of data, or click the **Last** and **First** links to move to the first and last row of data.
8.	Click the **Job Information** tab. ![Job Information]

Step	Action
9.	Scroll to the bottom of the screen to view additional information.

Job Information Fields

Effective Date - Date the action begins.

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

Job Indicator - Defaults over form the Work Location panel.

Action/Reason - Defaults from the Work Location panel.

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

Entry Date - Defaults in from the Job Code entry.

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

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

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

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

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

Job Information Fields (continued)

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).

Job Information Fields (continued)

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
10.	Click the **Payroll** tab.
11.	View the **Payroll** panel.

Payroll Fields

Pay Group - Defines a set of employees (with similar characteristics of pay) for payroll processing. A partial list of valid Pay groups is below:
 LSUNO:
   GR1 - Gratis New Orleans
   NBD – To Be Determined
   NBE – New Orleans Biweekly Exempt
   NBN – Biweekly Non-Exempt
   NBR – Residents (New Orleans)
   NBS – New Orleans Students
   NBT – Transients/Restricted
   NMF – Full-time Faculty Staff (New Orleans)
   NMG – Graduate Assistants (New Orleans)
   NML – Fellows (New Orleans)
   NMP – Part-time Faculty/Staff (New Orleans)
   NMS – New Orleans Stipends
   NRT – New Orleans Retirees

Payroll Fields (continued)

Holiday Schedule - Indicates the holiday schedule that an employee is on. A list is provided below:
   HCS - Health Care Srvs Div
   NOC (New Orleans) - Classified, Civil Service Employee
   NHS (No Holiday Schedule) - Unclassified employees. The holiday schedule is built into their base salary and the holiday schedule is not indicated. (This does not apply to HCSD). However, for HCSD Transients or Pool employees, Students and Restricted Appointments are not eligible for any benefits.
Employee Type - Denotes whether an employee is Hourly (H) or Salary (S). For HCSD, the only salaried employees are monthly unclassified.

Tax Location Code - Is always Louisiana.
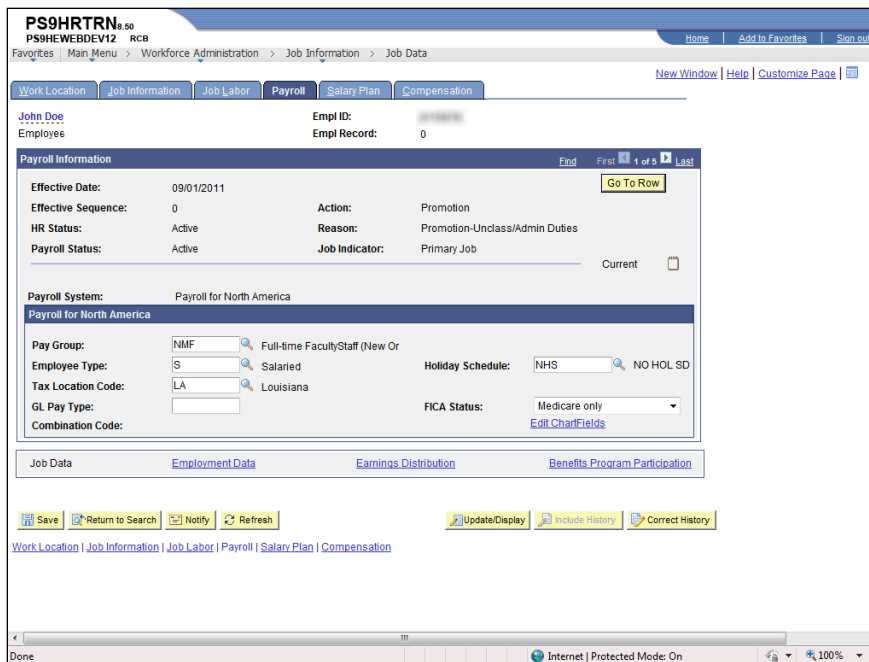
FICA Status - Indicates whether an employee is subject to:
   1. Medicare and Social Security
   2. Medicare only
   3. Exempt from paying Medicare or Social Security.
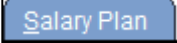
GL Pay Type - Field is not used at this time.

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

Edit ChartFields - Link is not used at this time.

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

Salary Plan Fields

Salary Administration - Is the type of plan the employee is on (AS, MS, PS, SS, TS and WS for Civil Service employees and UNC for unclassified employees.
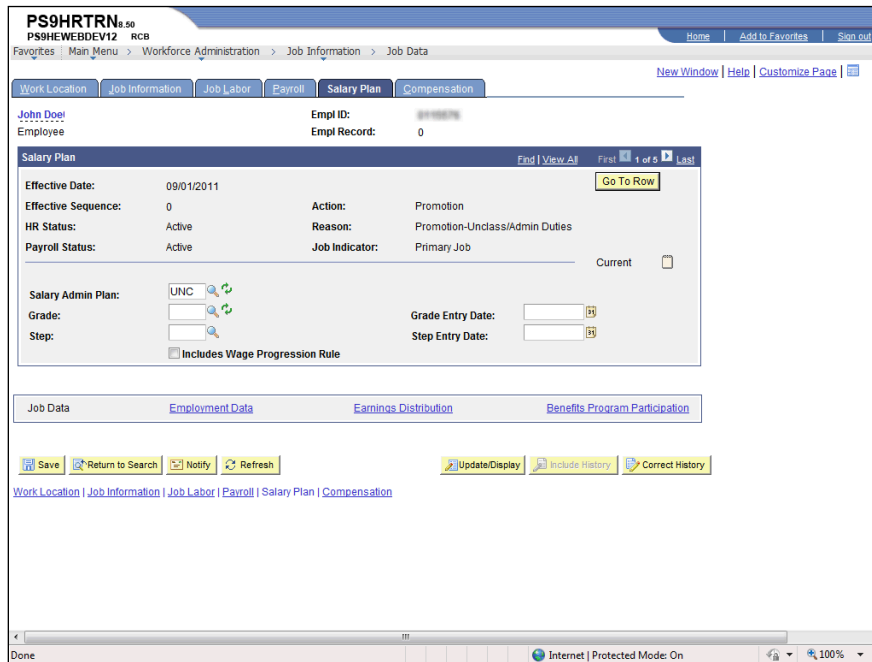
Grade - This is the pay grade according to Civil Service's pay plan for the jobcode.

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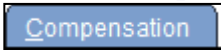
Includes Wage Progression Rule - Field is not used at this time.

Step - Not used at this time

Step Entry Date - Not used at this time.

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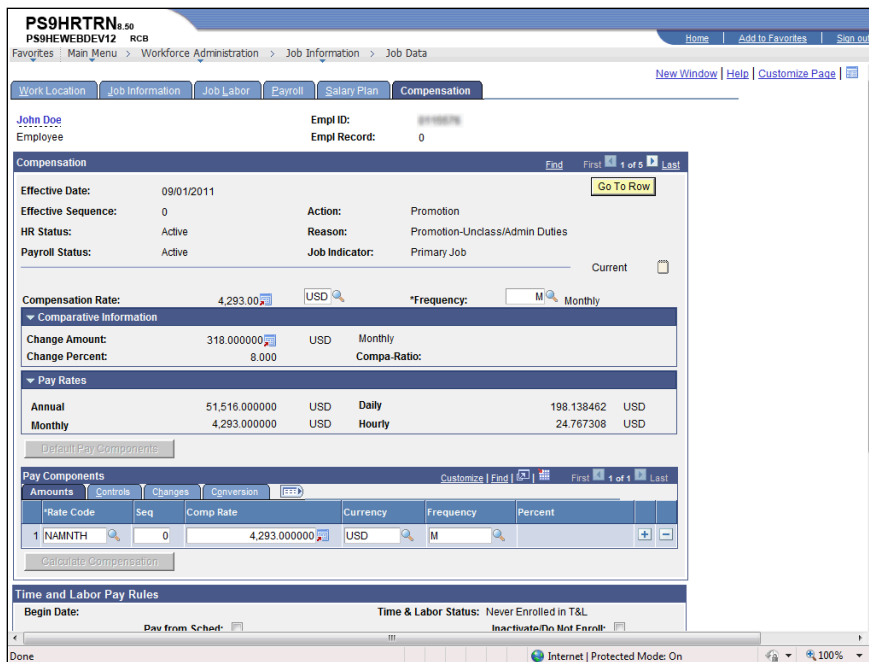
Step	Action
15.	Click the scrollbar to view additional data at the bottom of the screen.
16.	View the Pay components **Time and Labor** Pay Rules at the bottom of the **Compensation** panel.

Compensation Fields

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

Frequency - How often the employee is paid.

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

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

Employment Information Fields

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

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

Last Start Date - Is a defaulted date.

First Start Date - Original hire date with Business Unit.

Last Assignment Start Date - Is a default field.

First Assignment Start - Is a defaulted date.

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

Home/Host Classification - Is a defaulted field.

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

Benefits Service Date - The actual leave accrual date.

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

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

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

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

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

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

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

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

Employment Information Fields (continued)

Appointment End Date - Date assignment will end.
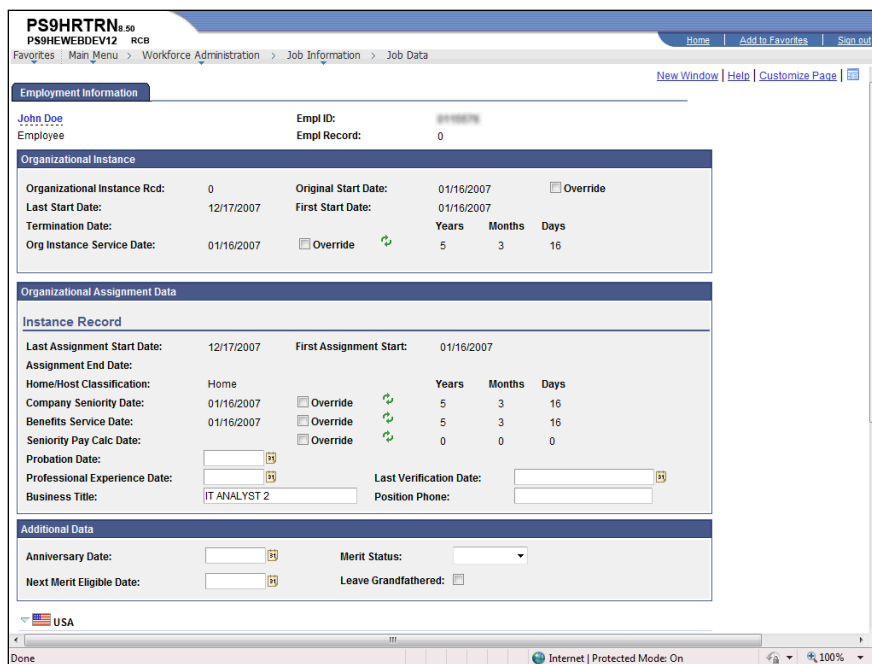
Contract Length - Field is not used at this.

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

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

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

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

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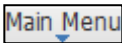
View a Job Summary

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

Procedure

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

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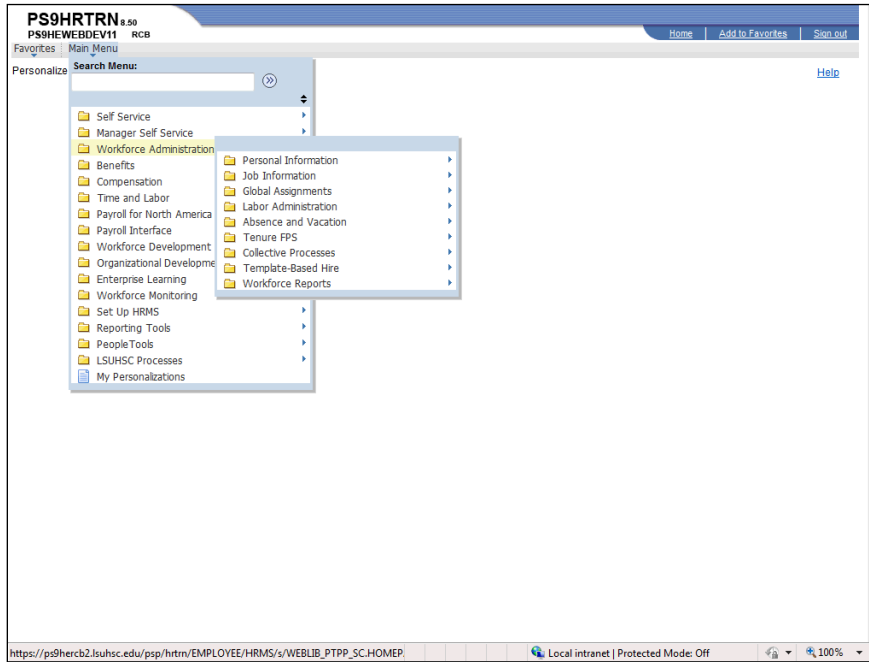
Step	Action
2.	Click the **Workforce Administration** menu > **Job Information** menu.
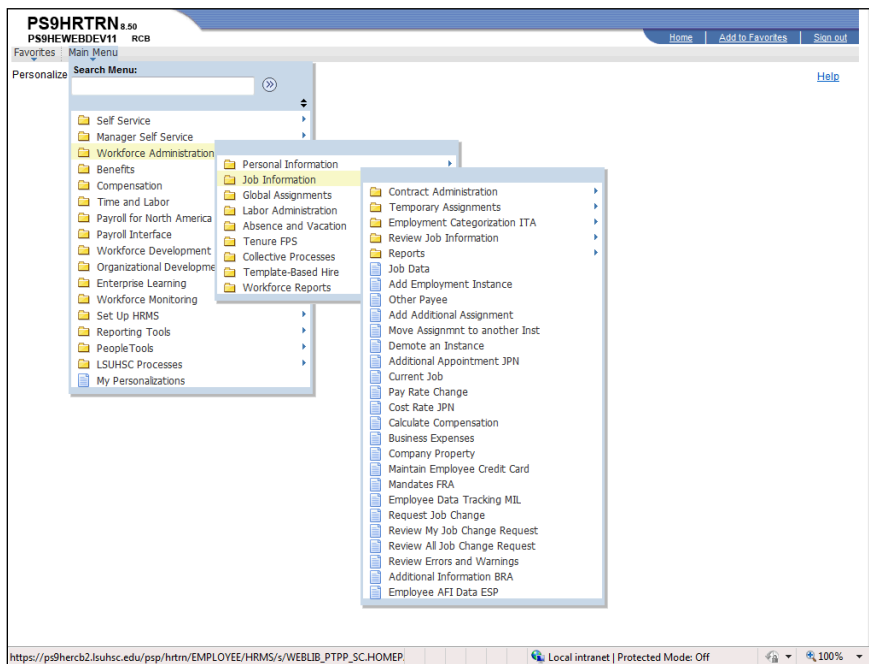
Step	Action
3.	Click the **Review Job Information** menu.

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

Step	Action
6.	View the General panel. Click the **Job Information** link. ![Job Information button]

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

Step	Action
8.	View the Work Location panel. Click the **Salary Plan** link.

Step	Action
9.	View the Salary Plan panel. Click the **Compensation** link. ![Compensation]

Step	Action
10.	View the Compensation panel. Click the **Components** link. Components
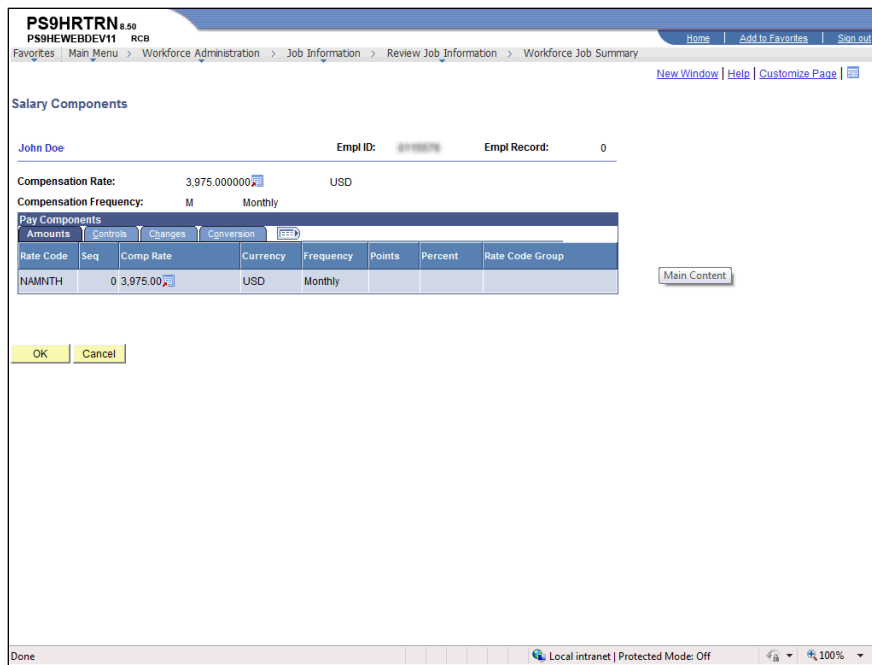
Step	Action
11.	Click the **Display In Other Currency** button.
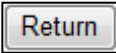
Step	Action
12.	Click the **Return** button.
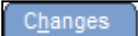
Step	Action
13.	View the Amounts panel.
	Click the **Controls** link.
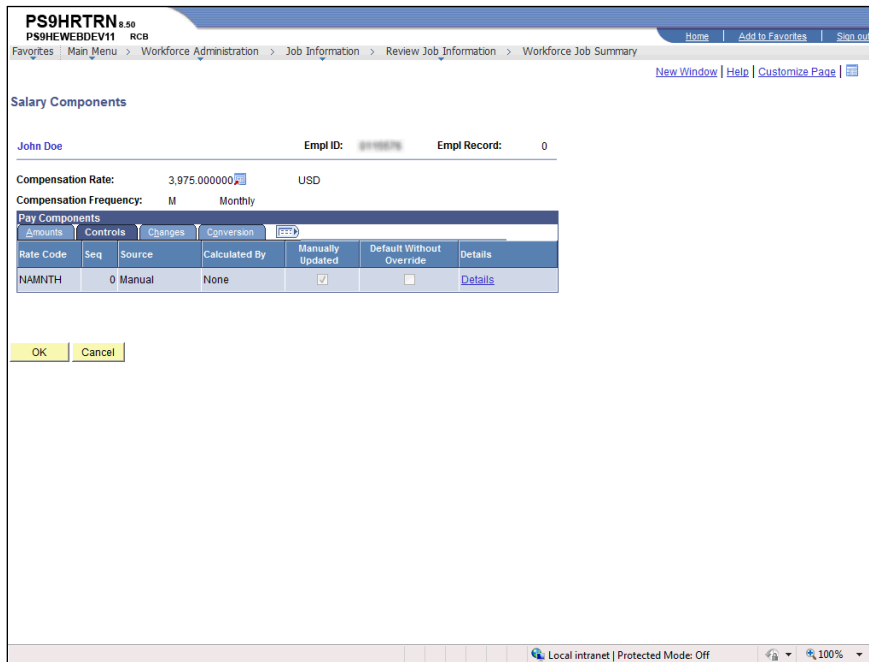
Step	Action
14.	View the Controls panel.
	Click the **Changes** link.

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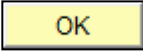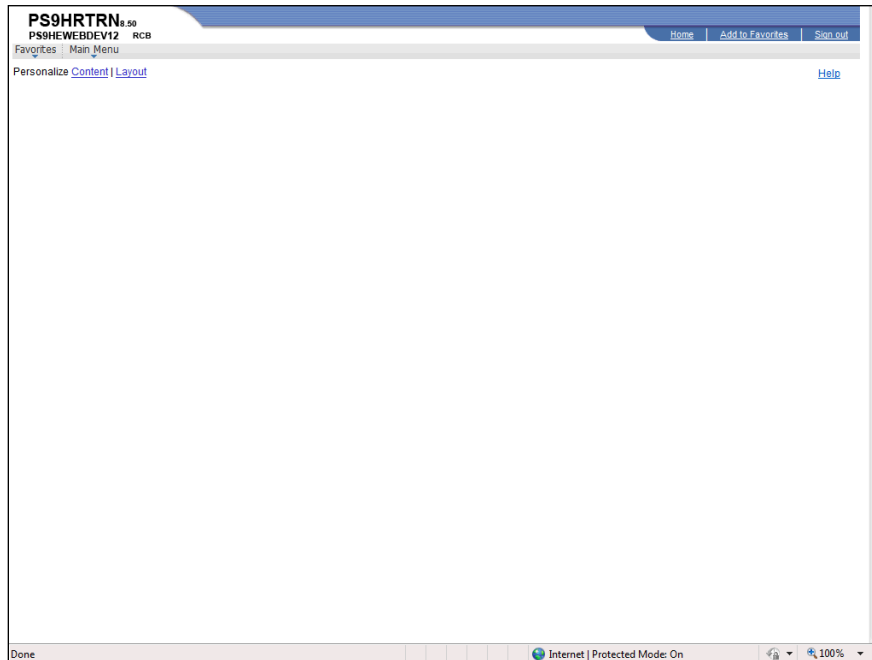
Step	Action
16.	View the Conversion panel. Click the **OK** button. OK
17.	Click the **Home** link. Home
18.	This completes the View a Job Summary topic. **End of Procedure.**

Monitor Absence

Procedure

In this topic you will learn how to Monitor Absence.

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

Step	Action
4.	Click the **Search** button.

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

Benefits

Review Accrual Balances

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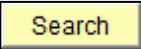
Procedure

In this topic you will learn how to Review Accrual Balances.
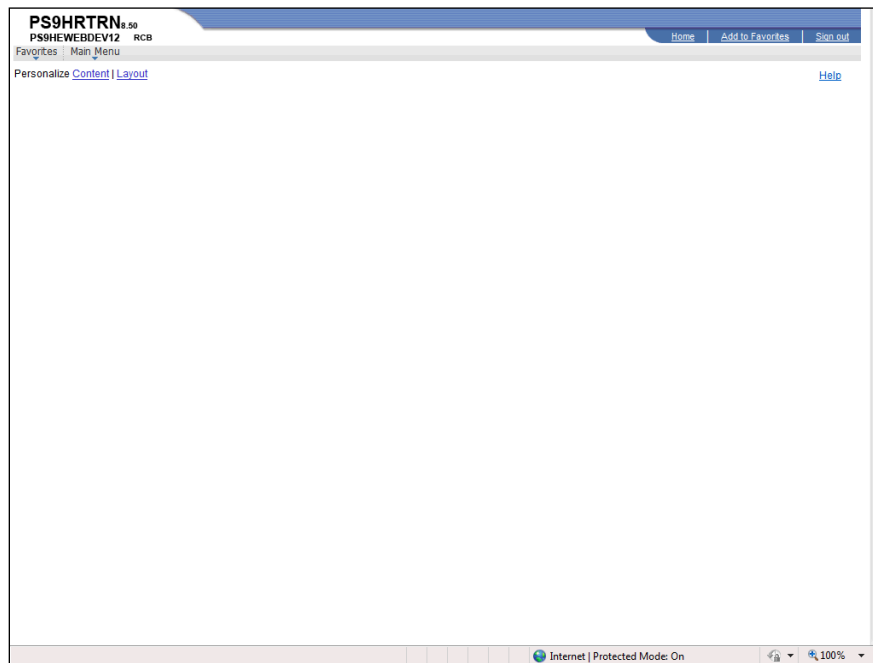
Step	Action
1.	Click the **Main Menu** button.
2.	Click the **Benefits** menu > **Manage Leave Accruals** menu.
3.	Click the **Review Accrual Balances** menu.

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

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

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

Step	Action
8.	Click the **Find** link. Find
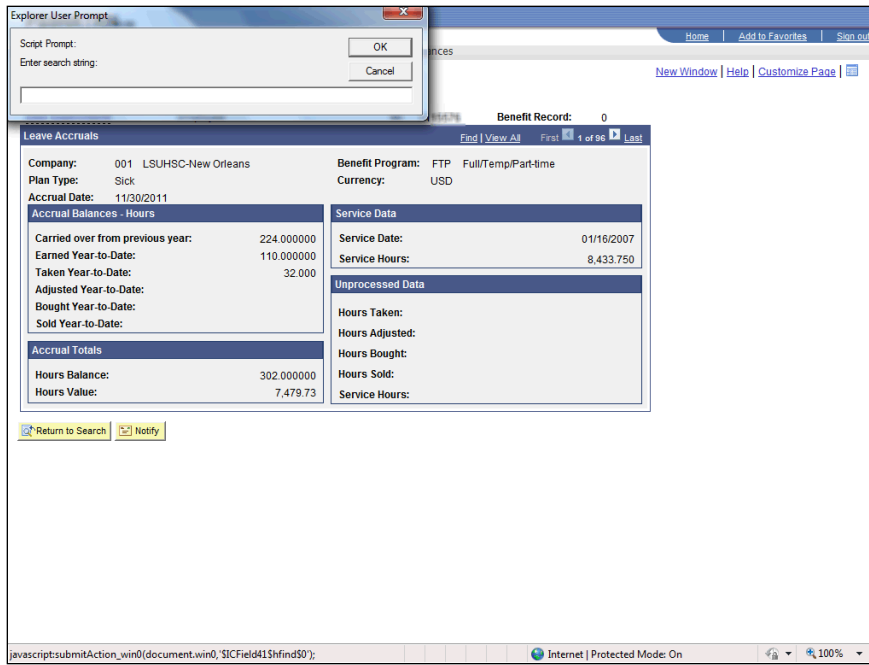
Step	Action
9.	Enter the desired information into the field. Enter "**Vacation**".
10.	Click the **OK** button.

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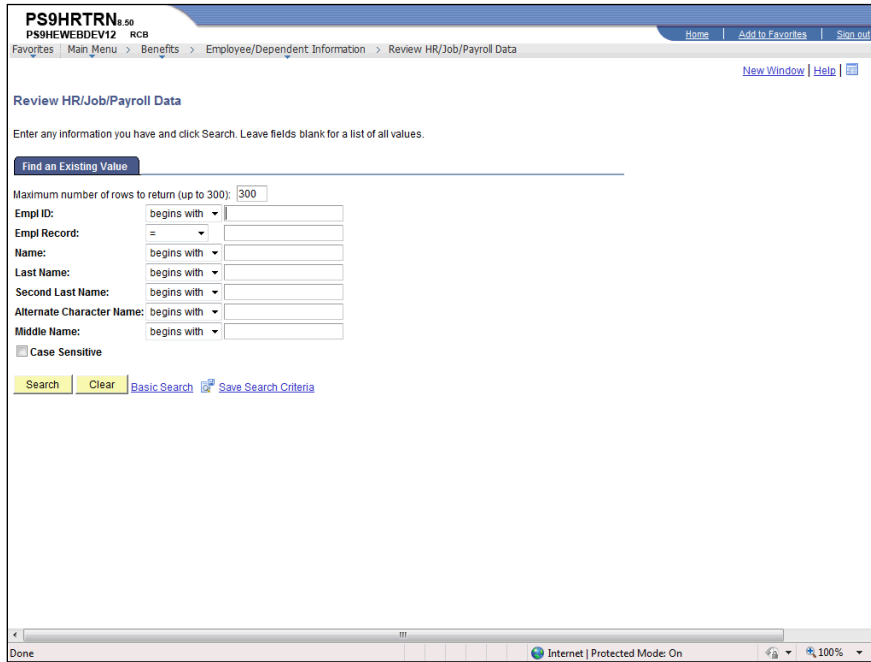
Review Employee Data Summary

Procedure

In this topic you will learn how to Review Employee Data Summary.
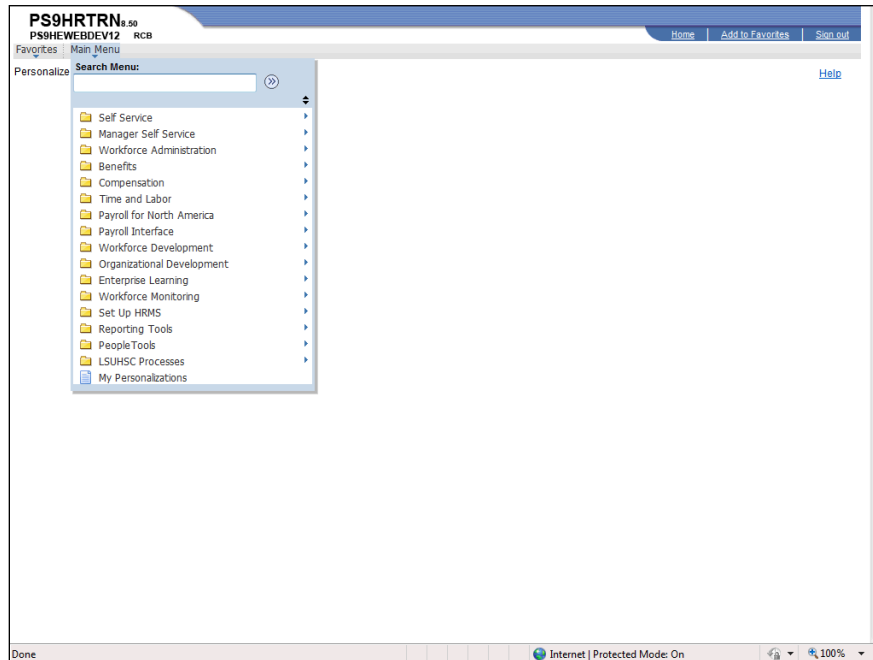
Step	Action
1.	Click the **Benefits** menu.
2.	Click the **Employee/Dependent Information** menu.
3.	Click the **Review HR/Job/Payroll Data** menu.

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

Step	Action
6.	View the Employee Data Summary page.
	Click the scrollbar.
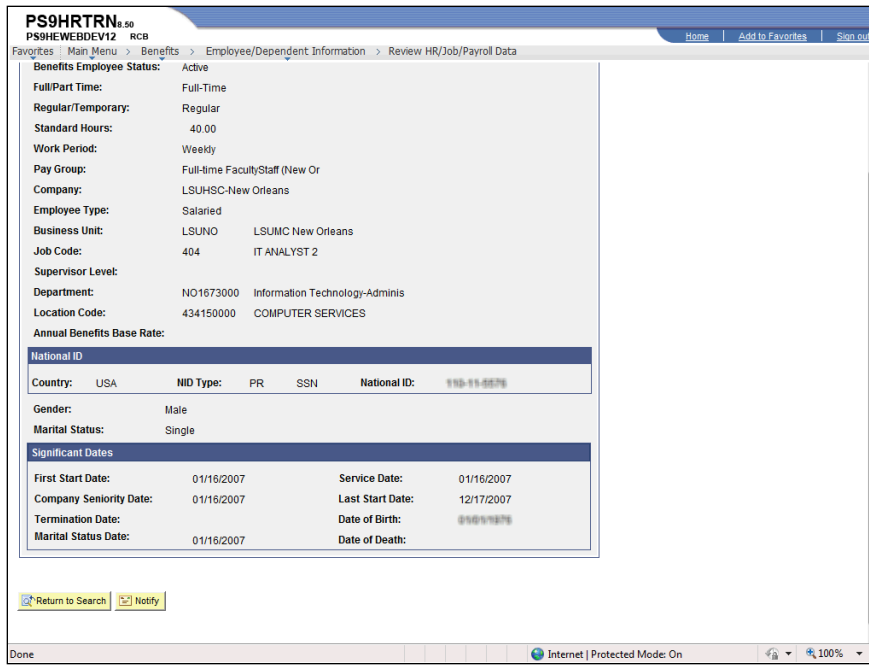
Step	Action
7.	Click the **Return to Search** button.
8.	This completes the Review Employee Data Summary topic. **End of Procedure.**

Payroll for North America

Review Paycheck Summary

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

Procedure
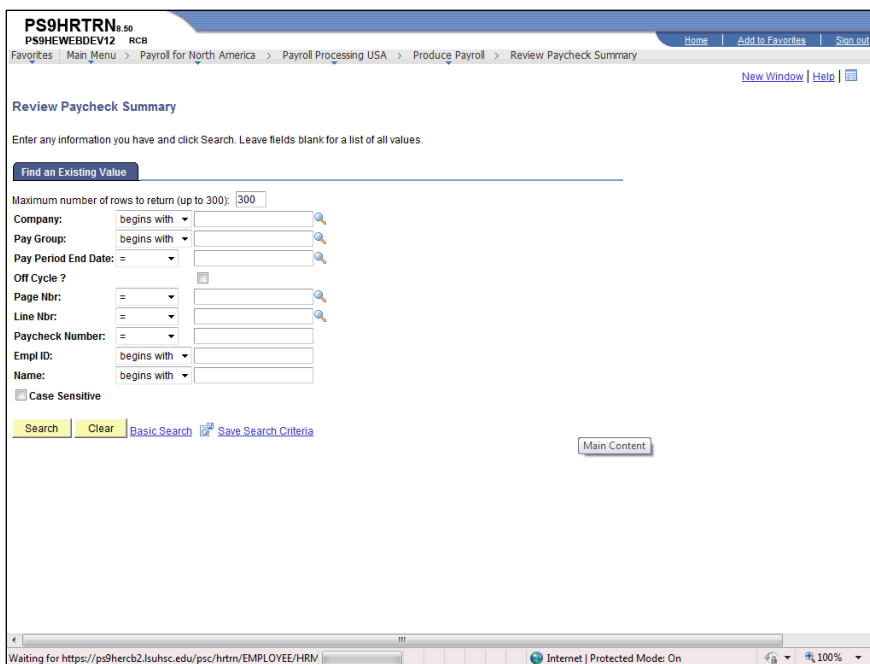
In this topic you will learn how to Review Paycheck Summary.
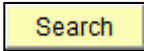
Step	Action
1.	Click the **Main Menu** button. Main Menu
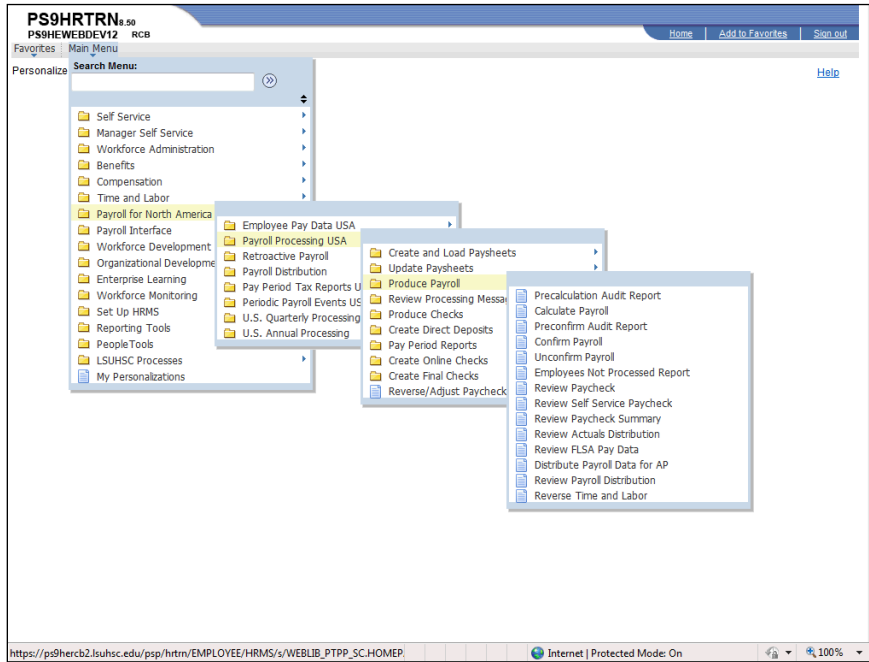
Step	Action
2.	Click the **Payroll for North America** menu > **Payroll Processing USA** menu > **Produce Payroll** menu, and the **Review Paycheck Summary** menu. Review Paycheck Summary

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

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

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

LSUHealth

Step	Action
7.	The Paycheck Summary page summarizes the information found on the paycheck or the pay advice (direct deposit) statement.

Check # is the actual Check Number or the Advice Number (i.e. employees who have direct deposit will have an Advice Number).

Click the **Expand section** button. |

Step	Action
8.	View the Earnings section. Click the **Collapse section** button. ▼
9.	Click the **Expand section** button. ▶

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

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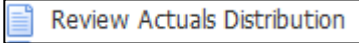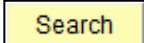
Review Actuals Distribution

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

Procedure

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

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

Step	Action
6.	All paychecks for an employee will display with the oldest at the top (ascending order). The end-user should take note of the Pay Period End Date when attempting to view a paycheck.

To change the order of paychecks from the oldest (ascending order) pay period end date to the most current (descending order) pay period end date; double-click the **Pay Period End Date** title column title.

Pay Period End Date |

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

Step	Action
9.	Click the **Deductions** tab.
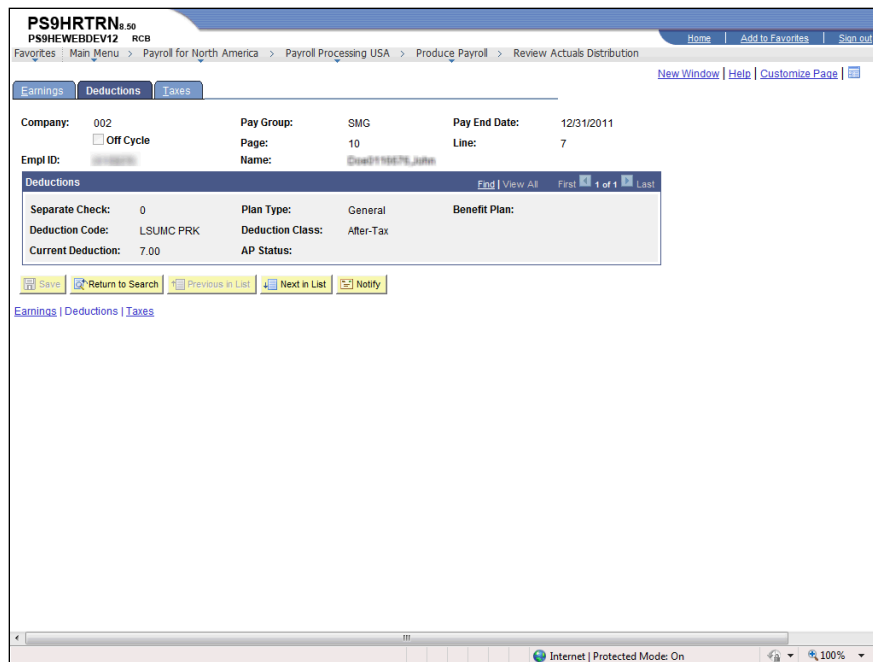
Step	Action
10.	View the Deductions panel. Click the **Taxes** tab,
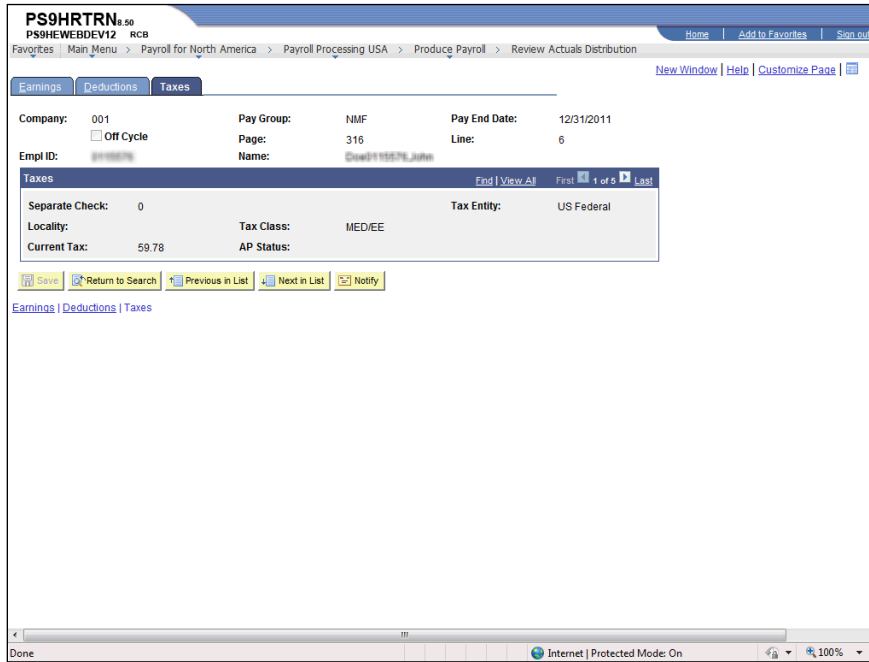
Step	Action
11.	View the **Taxes** Tab Click the **Home** link.
12.	This completes the Review Actuals Distribution topic. **End of Procedure.**

Workforce Development
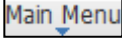
View Professional Education & Training

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

Procedure

In this topic you will learn how to View Professional Education & Training.
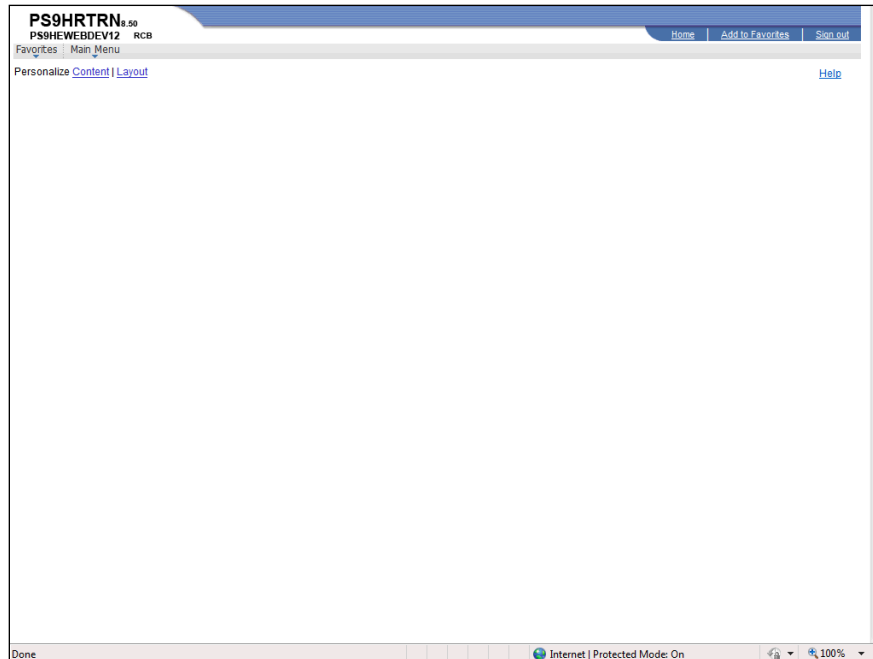
Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Workforce Development** menu > **Profile Management** menu > **Profiles** menu, and the **Person Profiles** menu. Person Profiles

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

Step	Action
5.	Click the **Education** link. **Education**

Step	Action
6.	Click the **Bachelor's Degree** link.
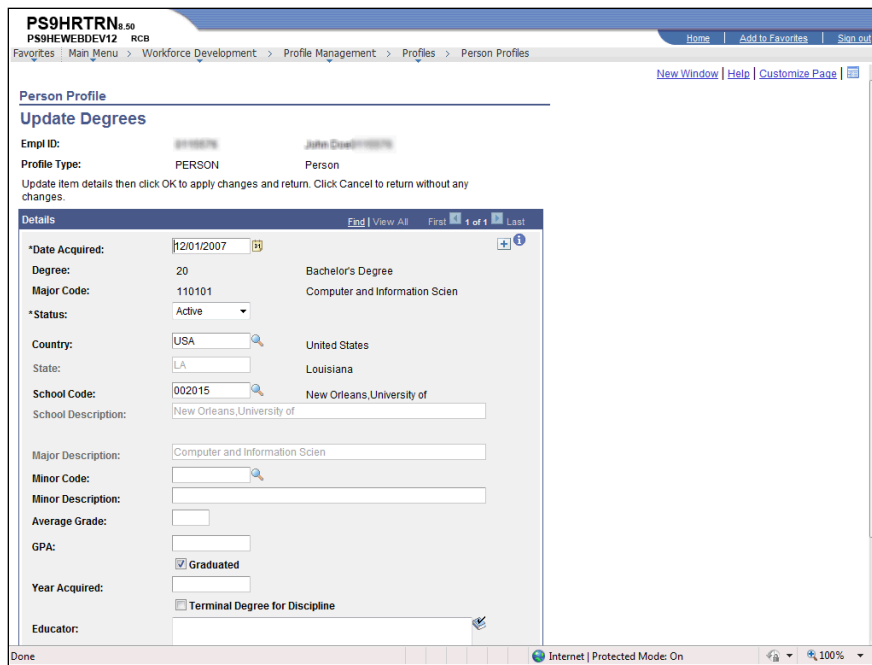
Step	Action
7.	Click the scrollbar to scroll to the bottom of the screen.

LSUHealth

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

Step	Action
9.	Click the **Home** link. ![Home]
10.	This completes the View Professional Education & Training topic. **End of Procedure.**
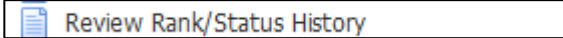
View Faculty Tenure

Procedure

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

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Workforce Development** menu > **Faculty Events** menu > **Calculate Tenure** menu, and the **Review Rank/Status History** menu. Review Rank/Status History
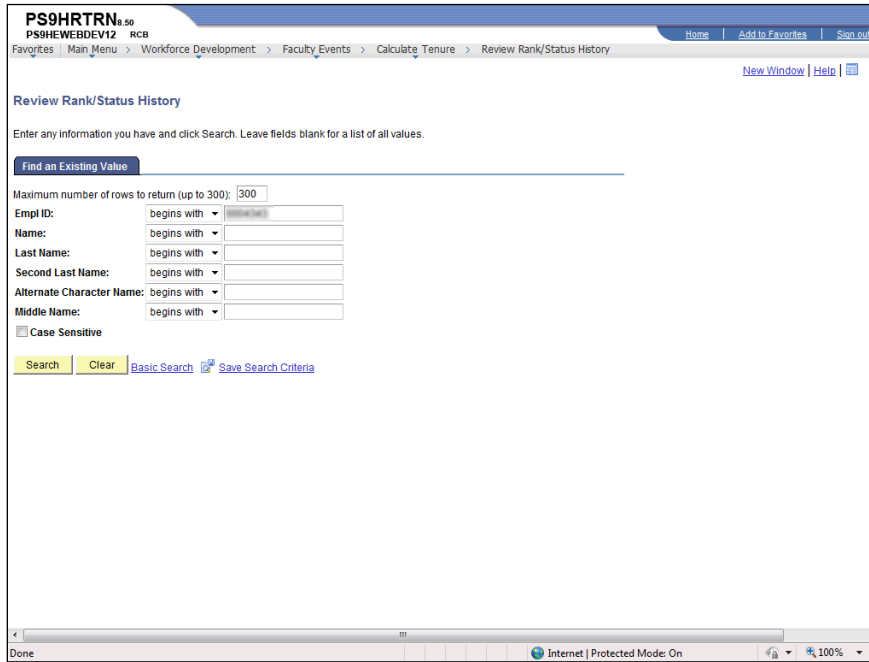
Step	Action
3.	You can search for an employee using either the Empl ID or the Last Name. All Empl ID's contain seven (7). You must include the preceding zeros when entering the Empl ID. Enter the desired information into the **Empl ID** field. Enter "**0000000**".
4.	Click the **Search** button.
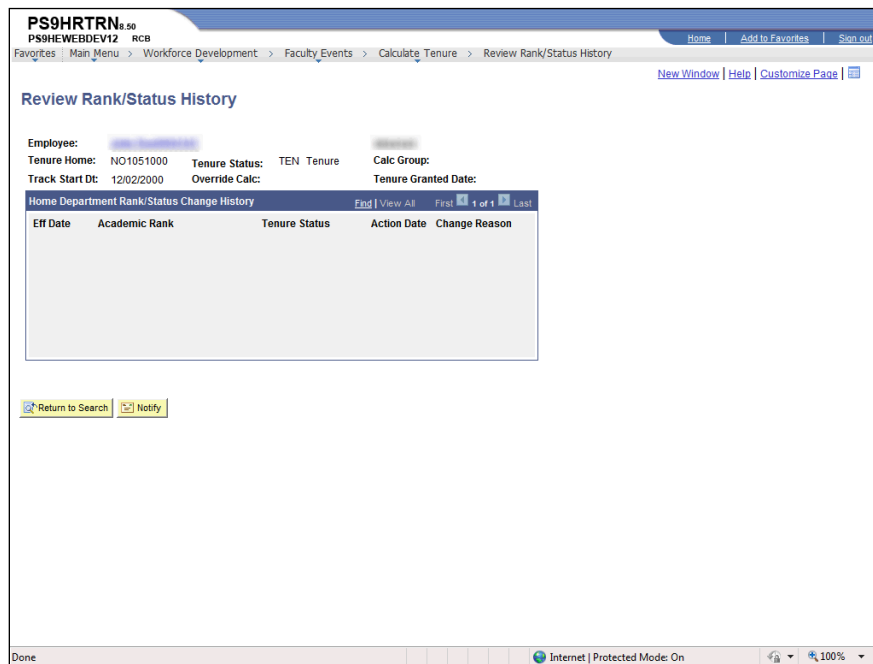
Step	Action
5.	View the Change History page for the employee's Academic Rank and Tenure Status.
	Click the **Home** link.
	Home
6.	This completes the View Faculty Tenure topic.
	End of Procedure.

Organizational Development

Position Data consists of information (such as job code, Department ID, location code, and pay group) directly associated with a position. Every employee in the institution has a position in PeopleSoft. When an employee fills a position or transfers to another position, he or she inherits all of the data from that position.
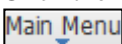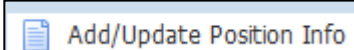
Many of the fields found on the pages of the **Manage Positions** components are contained in the Job Data pages. After a position is approved, it is input into the system by Human Resources. Once someone is hired, the data from the **Manage Positions** pages automatically populate to the Job Data pages.

Manage Positions

Procedure

In this topic you will learn how to Manage Positions.

Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Organizational Development** menu > **Position Management** menu > **Maintain Positions/Budgets** menu, and the **Add/Update Position Info** menu Add/Update Position Info
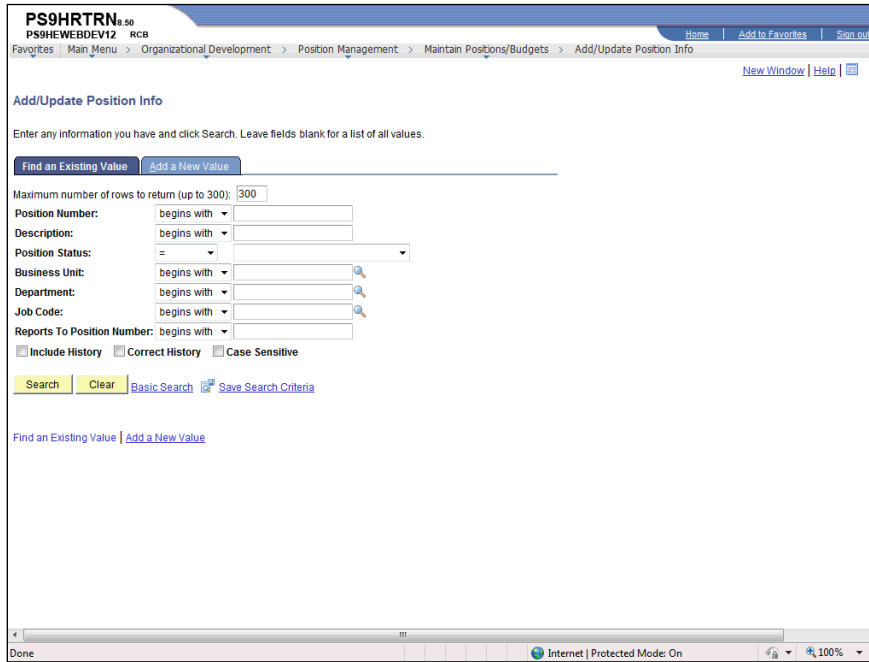
Step	Action
3.	The Position Number is an 8-digit number. You must include the preceding zeros when entering the position number. The Position Number can be found on the Work Location panel of the Job Data section. Enter the desired information into the **Position Number** field. Enter "**00034097**".
4.	Click the **Search** button.

Step	Action
5.	View the Description page.

Description Fields

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

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

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

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

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

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

Action Date - The date of input of the action.
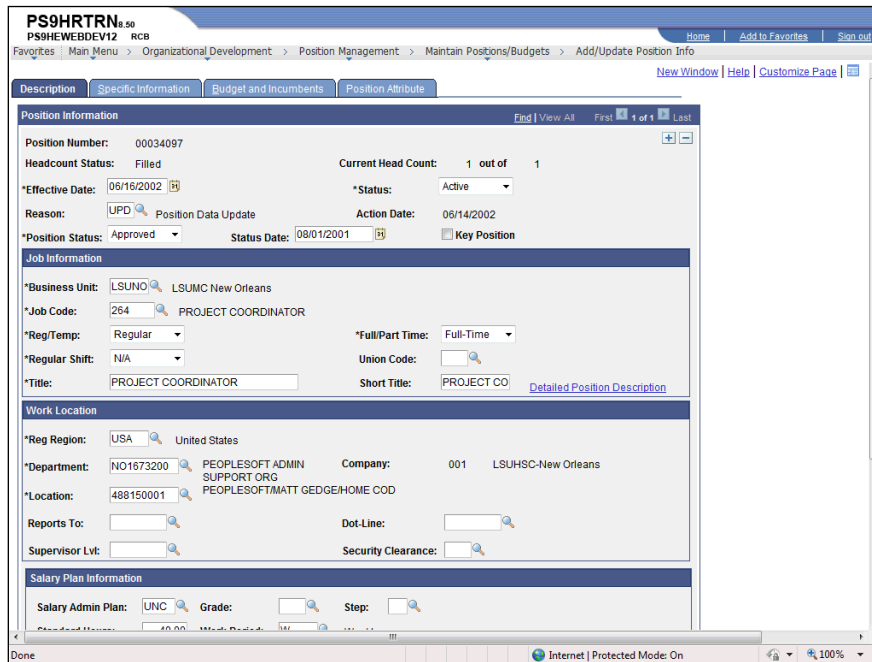
Position Status -

Status Date - Date the action began.

Key Position -

Dot-Line - Is not used at this time.

Security Clearance - Is not used at this time.

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

Step	Action
7.	Click the **Detailed Position Description** link.
	Detailed Position Description
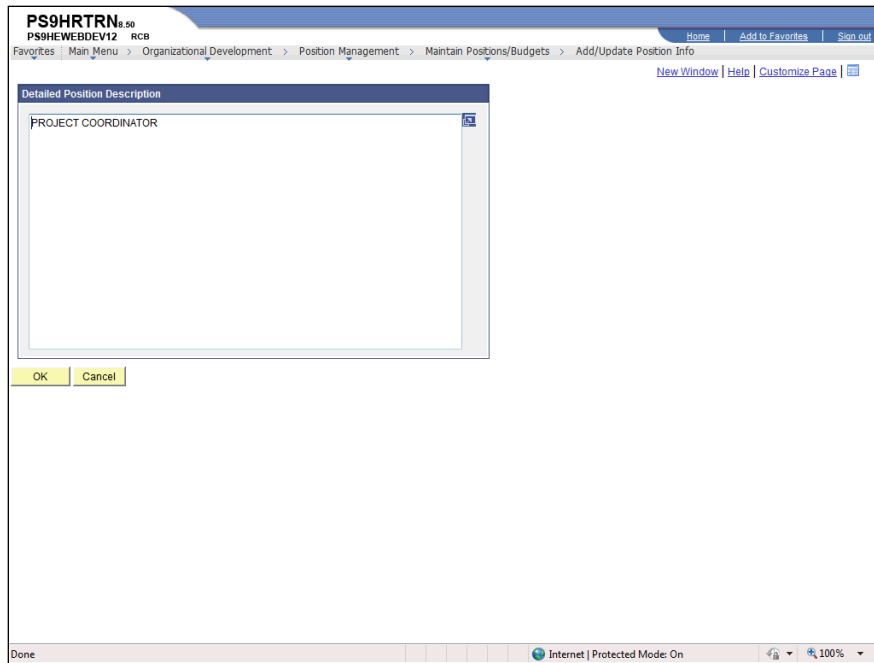
Step	Action
8.	Click the **OK** button.
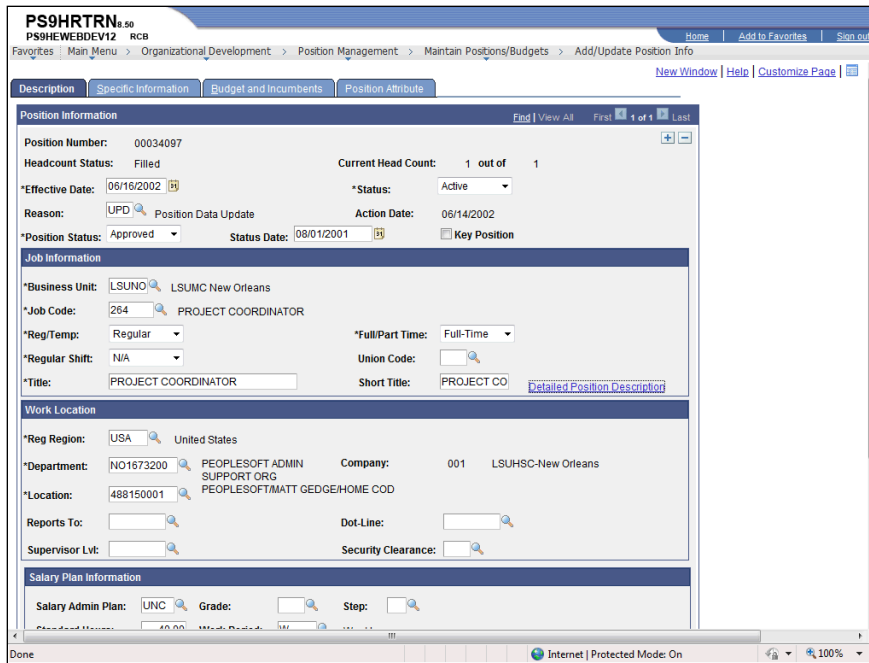
Step	Action
9.	Click the **Specific Information** tab. Specific Information
10.	View the Specific Information panel.

Specific Information Fields

Position Number - Numerical code assigned to a job.

Headcount Status -

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

Effective Date - Date the action began.

Status -

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 -

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 -

Signature Authority - Person given approval responsibility.

Job Sharing Permitted -

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

Step	Action
12.	View the Budget and Incumbents panel.

Budget and Incumbents Fields

Earnings - The monetary compensation paid to an employee.

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

Tax - Levy on employee's net income.

Cdn Tax -

Total -

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

Step	Action
13.	Click the **Job Data** link. Job Data

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

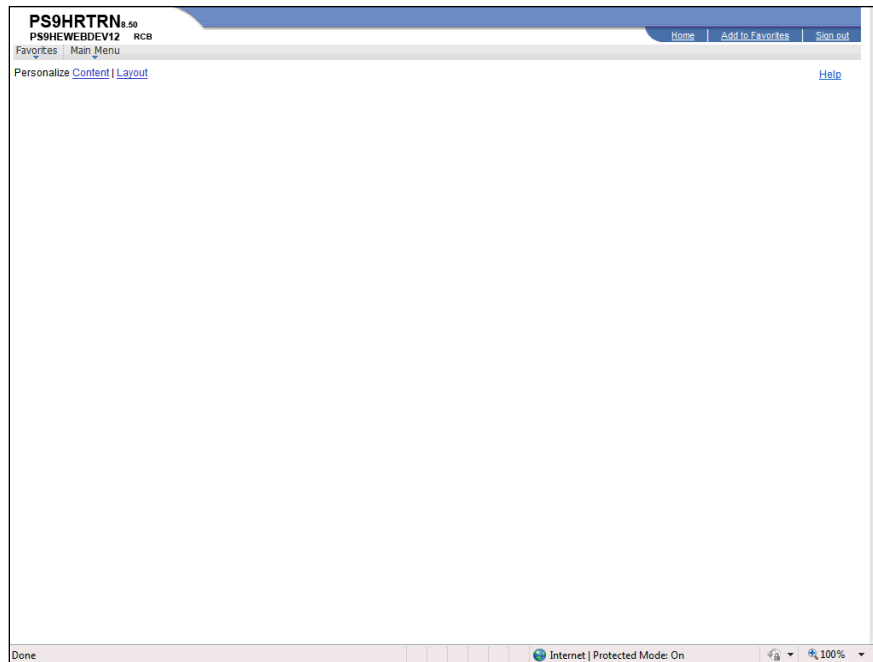| Step	Action
15.	Click the **Position Attribute** tab. Position Attribute
16.	View the Position Attribute panel.

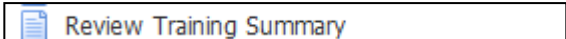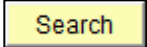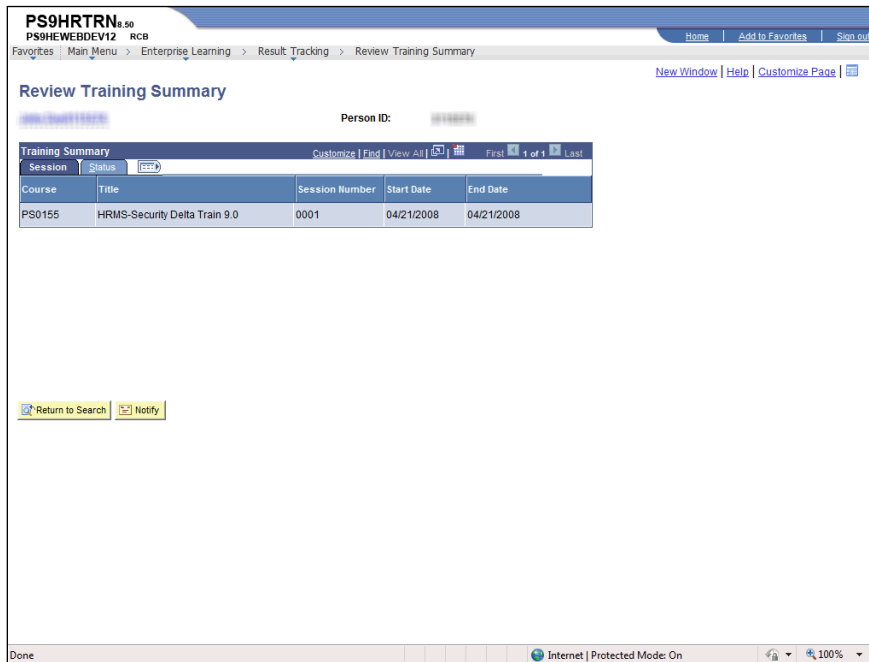| Step	Action
17.	Click the **Home** link.
18.	This completes the Manage Positions topic. **End of Procedure.**

Enterprise Learning

Review Training Summary

Procedure

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

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

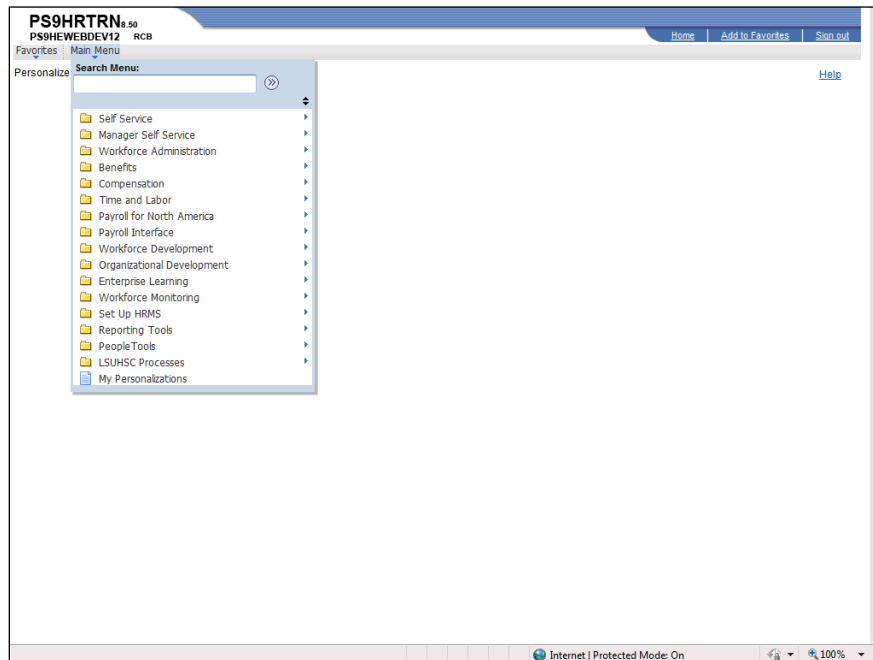| Step	Action
4.	Click the **Status** object. Status
5.	View the Status panel.
6.	This completes the Review Training Summary topic. **End of Procedure.**

Budget Information

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

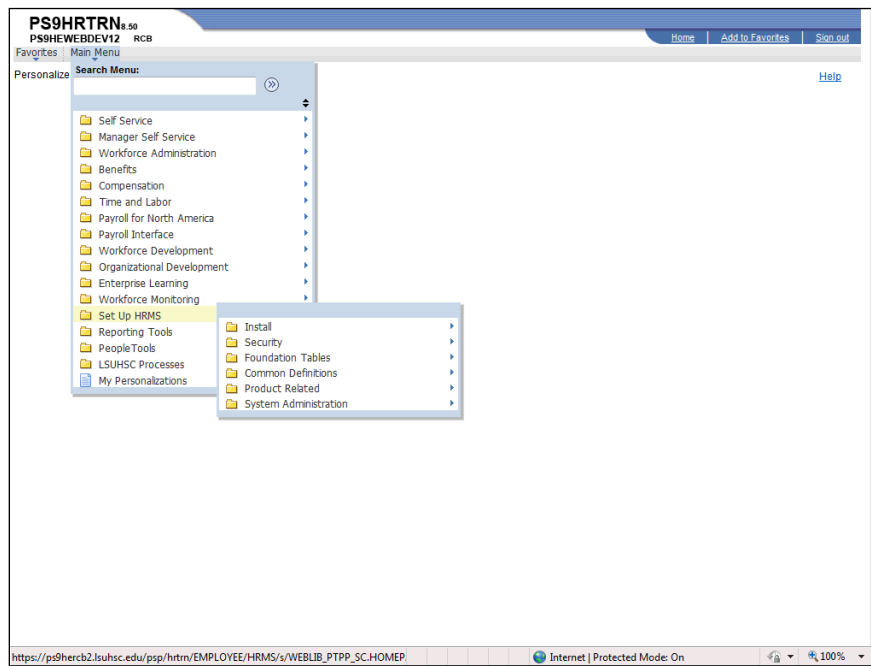## View Department Budget Table

Procedure

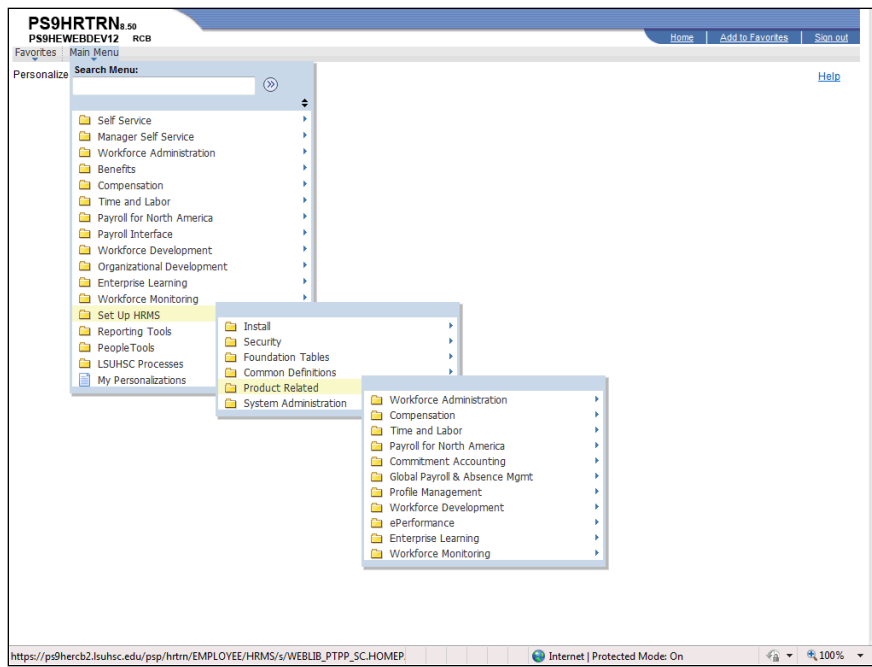In this topic you will learn how to View Department Budget Table.

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

Step	Action
2.	Click the **Product Related** menu.
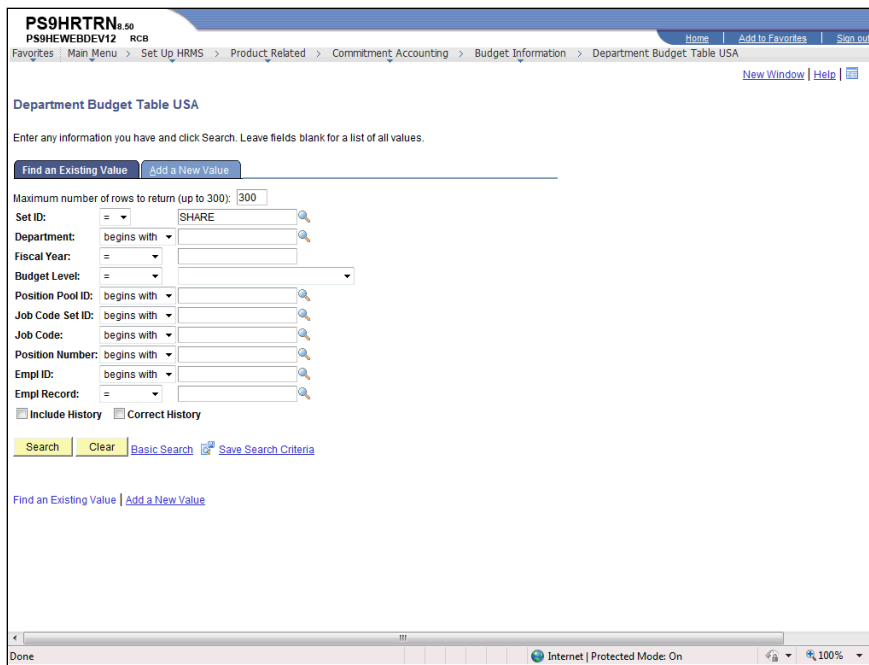
Step	Action
3.	Click the **Commitment Accounting** menu.
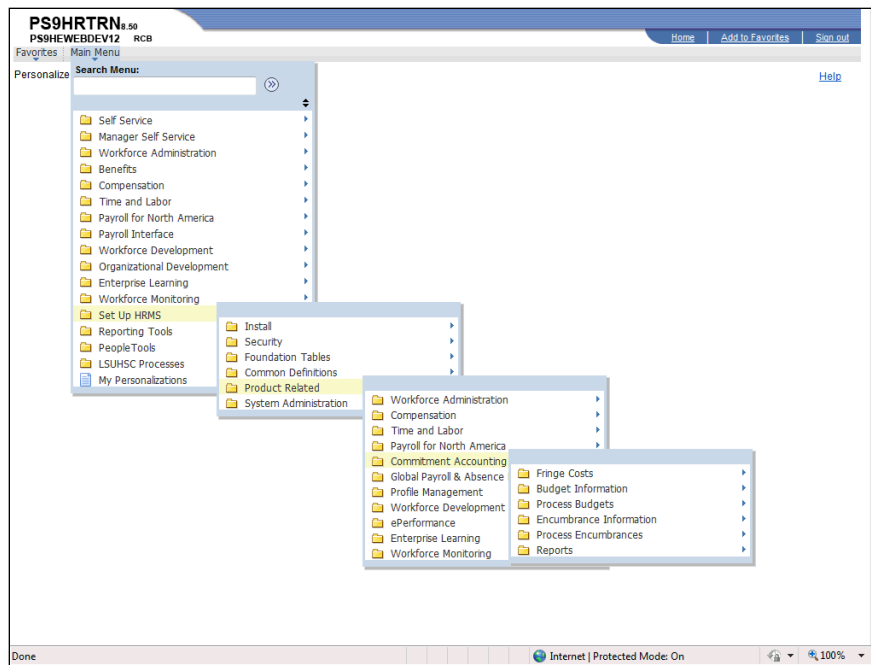
Step	Action
4.	Click the **Budget Information** menu.
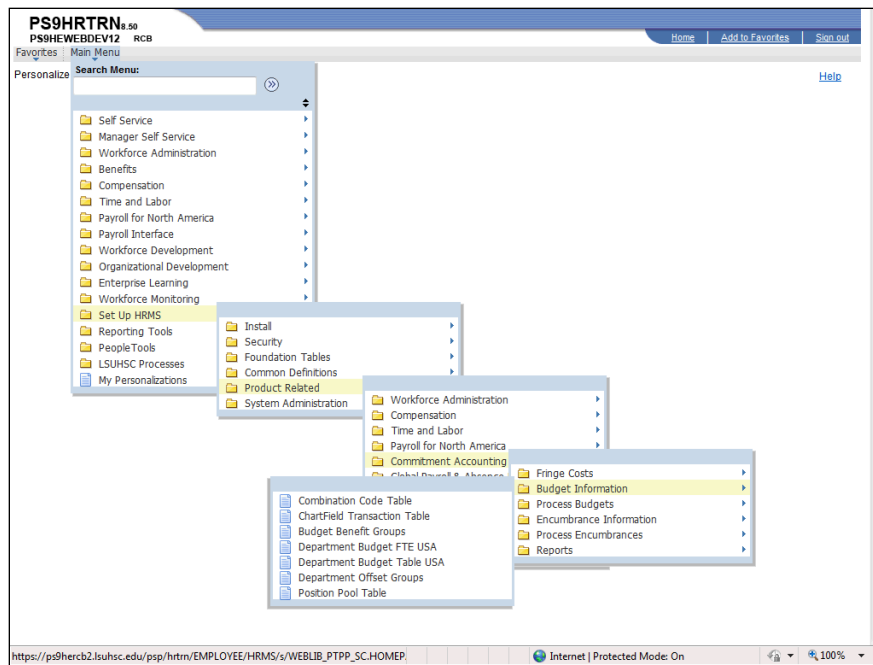
Step	Action
5.	Click the **Department Budget Table USA** menu.
	Department Budget Table USA

Step	Action
6.	Enter the desired information into the **Position Number** field. Enter "**00034097**".
7.	Click the **Search** button.

Step	Action
8.	Click the **Fiscal Year** link. 2012

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

Step	Action
10.	View the Dept Budget Earnings panel.

Dept Budget Earnings Fields

Effective Date - The date the action begins.

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

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

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

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

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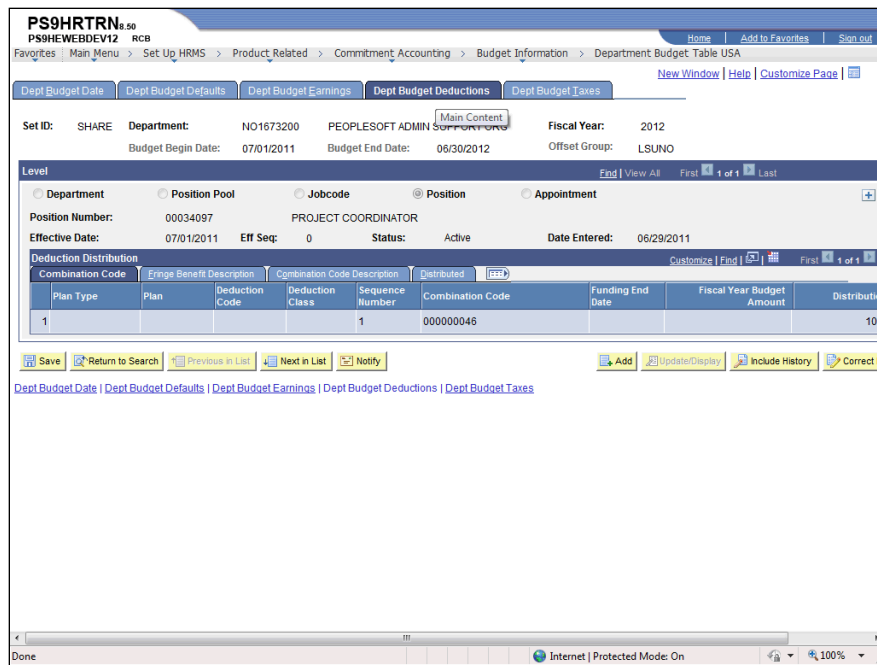
Step	Action
12.	View the Dept Budget Deductions panel. Click the **Return to Search** button. ![Return to Search]
13.	This completes the View Department Budget Table topic. **End of Procedure.**