OHR – Training for ASU

with

HRIS View Only Access
Reference Guide
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OHR – Training for the ASU Community

Subject: RE: ROOT CAUSE: Terminations vs Transfers

The purpose of these sessions for OHR is to create the opportunity to consolidate OHR’s knowledge so that the correct information about Terminations and Transfers can be pushed out to the ASU community.

Nine points have been identified as areas of confusion at the departmental level. They are:

1) ASU does not understand effective dating.
2) ASU does not understand when to term a job.
3) ASU does not understand when to rehire a job.
4) ASU does not understand when to add an additional job.
5) ASU does not understand when to add a new effective dated row.
6) ASU does not understand when to use correct history.
7) ASU does not understand the relation between position data and job data.
8) ASU does not understand how to research and fix errors.
9) ASU does not understand how HR data, Benefits data, and Payroll data are integrated.

This manual, which has been developed initially for use in the field, is also for use as a starting point for OHR to put together the facts needed to explain the nine points listed above and how they relate to terminations and transfers.
How to Use this Reference Guide

This document will tell you what you can do with the HRIS View Only Access roles in PeopleSoft.

When you see a text box like the one below, it is there to give you the navigational path to the area being addressed on that page. This lets us leave the menu out of the screenshots, which results in a much more readable screenshot for all.

+ Navigation: Workforce Administration>Job Information>Job Data
Log into PeopleSoft

Open a web browser and navigate to https://hrsa.oasis.asu.edu
Sign in with your ASURITE ID and password.
You can do this from any computer that is connected to the internet.

After you click the “Sign In” button you will arrive at your home page.
SECTION 1: View Job Information

Once you are logged in, it will take you to this screen

1. Click on Workforce Administration
2. Click on Job Information
3. Click on Job Data

The Job Data link contains information about the employee’s position number department, pay group, compensation, and basic benefits.
This is the Job Data search page. Fill in the known data about the person you are interested in and click **Search**

- **EmplID** = Employee ID. (AKA as the 10 digit Affiliate ID (1200…..#)
- **Alternate Employee ID** = ASU ID (993#)
- **Name** = Employee’s full name – can enter First and Last name, i.e. Mickey Mouse
- **Last Name** = Employee’s Last name (can enter partial letters as well, i.e. Mou)
- **Second Name** = Not currently being used
- **Alternate Character Name** = Could do a search by Last, First Name, i.e. Mouse, Mickey.
- **Middle Name** = could also search by middle name if known
- **Include History** = click if wanted to see older rows (history) and not just current data row. For instance an employee was hired 1/1/05 into the College of Business, and was recently transferred to Engineering on 7/1/06. The 7/1/06 row is the current row, and 1/1/05 is the history row.
- **Case Sensitive** = would not normally use, not usually case sensitive, might be helpful if searching for names like McLane
When you click on search and there are multiple rows that appear, you will get a screen like this, you can select the person you want by clicking on any link in the row of the person you wish to see.

Any time you see the same ID and more than 1 Employee Record Number (Empl Rcd Nbr) listed, this means the employee has more than 1 job. Include History covers past, current, and future jobs.

In other cases there may be the same Empl Rcd Nbrs because two employees have the same name.

This search will only bring up an employee list if you have the associated security level.
1. **HR Status** = Active or Inactive (benefits status)
2. **Payroll Status** = Payroll status equals employee status. This relates to active, termed, Susp, LWOP, LWP, or retired.
   - Active – pay continues
   - Leave of Absence (unpaid) – pay suspends
   - Leave with Pay (paid) – pay continues, maybe LOA, or FMLA
   - Terminated – pay terminates, as well as benefits
   - Retired – pay terminates
   - Hold (suspend – benefits is the only one using this code) – pay suspends
3. **Find link** = if there are multiple rows i.e. 1 of 30, you can search by date action code, etc.
4. **1 of X**= multiple rows have been added to employee record
5. **Effective Date** = Date of transaction (action reason), could be current, past or future dated.
6. **Sequence** = if more than 1 transaction occurs on same day (i.e. promotion and ad hoc), then there will be multiple sequence numbers (zero, one, two. . .)
7. **Job Indicator** = will show either Primary (highest FTE or oldest hire date if FTE % is split evenly) or Secondary. Termination should have an N/A job indicator.
8. **Action/Reason** = the action appears in the first field and the reason the second field. I.E; Action = hire, Reason = Reg (INITIAL HIRE)
9. **Last Start Date** = the date the person was last hired on this job.
10. **Termination Date** = each job has its on termination date which is one day after the employee was last paid for this job. Termination means leaving A.
11. **Expected Job End Date** = Not yet functional.
12. **Position Number** = Job Information is defaulted from position (through position management)
   - Job Code
   - Regulatory Region
   - Company
   - Business Unit
   - Department Id
   - Reports To
   - Empl Class
   - Class Indicator
   - FLSA Status
   - Location
   - Standard Hours – can be overridden
   - Full/Part time – can be overridden
   - Reg/Temp – can be overridden
   - Pay Groups – can be overridden

13. **Position Entry Date** = the date they entered the position
14. **Department Entry Date** = the date they entered the department
15. **Regulatory Region** = always USA
16. **Company** = always ASU
17. **Business Unit** = VP code
18. **Department** – where the employee works, it maybe underneath the VP area
Job Code = displays job code number and job code description
- Entry Date = same as position entry date on work location tab
- Supervisor Level = not using this field
- Reports To = should show both position number and employee’s supervisor’s name.
- Regular/Temporary =
  - LT Temp (long term temp)
  - ST Temp (short term temp)
  - Regular
  - Seasonal E.g. Bookstore employees who only work 3 weeks.
- **Full/Part** =
  - Full-time
  - Part-time
  - PRN

- **Empl Class** =
  - Classified Staff
  - Faculty
  - Faculty with Admin Appt
  - Academic Professional
  - Academic Professional with Fiscal Appt
  - Service Professionals
  - Administrators
  - Graduates
  - Students

- **Officer Code** = PSPRS, only used for employees that carry guns within the Police Department (updated off of position)

- **Classified Indc** = ABOR reporting codes – empl class and classified indicator should correlate (i.e. both = SP or Class, Empl Class could be Faculty and Classified Indic could be Dean, Faculty Associate, etc)

- **Standard Hour** = updated from position

- **Work Period** = always weekly

- **FTE** = is calculated based on the number of standard hours a person works in a week

- **Adds to FTE Actual Count** = is used when a person has more than one job in the same BEN Record number to determine the combined FTE

- **Contract Number** = not using

- **Contract Type** = not using

- **Workers Comp** = is defaulted from job code

- **EEO Job Code** =

- **Finger print required** =

- **USA Flag** (click on arrow to expand this option)
  - **FLSA Status** = non-exempt or exempt (defaults from position)
  - **EEO Class** = not using
  - **Work Day Hours** = not using
This is the payroll page. You can view pay group and employee type

**Payroll System** = ASU is using Payroll for North America

**Pay Group** = is the grouping from which employees will be paid based on FLSA status, Employees Class, and if they are paid over a contract.
- A12 = Academic 12 Month Pay
- ACD = Academic Contract Year
- GRD = Graduate Contract
- HRY = Non-exempt (Classified Staff, Service Professionals)
- SAL = exempt paid fiscal
- STU = Student Hourly

**Holiday Schedule** = same for all employees

**Employee Type** = represents how you will be paid (S – salaried and H – hourly)

**Tax Location Code** = always AZ

**FICA STATUS** = Subject or Not Subject

**GL Pay Type** = not used

**Combination Code** = not used
• **Salary Admin Plan:**
  - ADMIN = Administrative
  - CLAS = Classified
  - EXEC = Executive
  - FCLT = Faculty
  - STDT = Student Workers
  - SVPR = Service Professional

• **Grade** = Currently this is only populated for Classified and Service Professional
Frequency:
- ASUBW = ASU bi-weekly
- C = Contract Pay

- Pay Components (Rate Code)
  - NAANNL = Annual
  - NAHRLY = Hourly

  Calculate Compensation button populates payrates.

- Frequency:
  - A = Annual
  - H = Hourly
Navigation Note:

- **Previous in List** = takes you to the prior name in your search list
- **Next in List** = takes you to the next name below in your search list or employee record if more than one.
- **Notify** = is used when workflow is available (not currently using workflow)
- **Previous Tab** = takes you to the prior tab
- **Next Tab** = takes you to the proceeding tab
- **Update/Display** = Allows you to add new rows and view current and future rows.
- **Include History** = You can view current, future, and history rows.
- **Correct History** = allows you to correct history. USE EXTREME CAUTION.
This is the Employment Information screen. You got here by clicking on the Employment Data link.

On this page you can view years of service and original hire date (first start date and original hire date are the same)
The earnings code associated with the employee’s pay.
SECTION 2: Position Management Cross Reference

Page Name: Position Cross-Reference

Navigation: ASU Customizations → ASU HCM Custom → ASU Position Management → Position Cross-Reference

This screen can be used to find a position/employee by any of the criteria allowed for search. The fields that are primarily utilized are Position Number and EmpID.

View details of a position, including current employees, HR details, and funding information. NEW – a second tab that is similar to the Commitment Accounting Cross-Reference table and shows expenses to date, redistributions, encumbrances, and to come – will bring in the budget information for the position from STAR(OutlookSoft – budgeting software)
Page Name: Position Cross-Reference

Navigation: ASU Customizations → ASU HCM Custom → ASU Position Management → Position Cross-Reference

- **Position Number** = Position Number
- **Effective Date** = Date that the data on the page went into effect
- **Descr** = Description of Position
- **DeptId** = Department ID number
- **Job Code** = Job Code of position
- **Reports To:** = Position Number that the current position reports to
- **Fiscal year** = Change this to view distributions for different fiscal years
- **Submitted Front End Data Not Processed Yet** = Data in this box has been submitted, but not approved yet.
- **Current Incumbent List** = All of the employees currently attached to the position.
- **Position Data Details Link** = Shows details about the position
- **Fiscal Year Distribution** = Shows funding sources for the position
When you click on the *Position Data Details* link, you will see this page.

If you click on Position Data Details from the main screen, the screen above will populate based off current, not submitted, position data details.
Clicking on the *Fiscal Year Distribution* link will show this page.

If you click on Fiscal Year Distribution, the screen above will populate. This shows the current funding distribution for this position.
SECTION 3: View A Contract

To view a person’s contract, go to Workforce Administration -> Job Information -> Contract Administration -> Update Contract Pay NA (North America)
Search for the person that has the contract you are interested in.

- **EmplID** = Affiliate ID (1200…..#)
- **Empl Rcd Nbr** = A number between 0 and 99. Assigned by PeopleSoft for employee record in job.
- **Name** = Employee’s full name – can enter First and Last name, i.e. Mickey Mouse
- **Last Name** = Employee’s Last name (can enter partial letters as well, i.e. Mou)
- **Second Name** = If employee had a previous name (i.e. maiden name) – future use, nothing was converted
- **Alternate Character Name** = Could do a search by Last, First Name, i.e. Mouse, Mickey
- **Middle Name** = could also search by middle name if known
- **Include History** = click if wanted to see older rows (history) and not just current data row in each job record
- **Case Sensitive** = would not normally use, not usually case sensitive, might help if searching for names like McLane
This is the Contract Pay page.

- **1 of X** = multiple rows have been added to employee record
- **Effective Date** = Date transaction happened, could be in past or future dated (90 days out or less)
- **Contract Pay Type**
  - Contract Paid over 12 months
  - Contract Paid over 9 months
  - Graduates
  - Other Contract Types
- **Payment Term**
  - Pay over 12 months
  - Pay Over Contract
  - Pay Over "X" months
  - Pay With Lump Sum
- **Monthly Frequency** = Always will be "M"
- **Pay Period Hours** = Number of hours to be worked each pay period (each 2 week period)
- **Assign Hours To:**
  - All Earnings (Contract + PNE + ENP)
  - Contract Earning Only
  - Not Applicable
- **Renew Contract Automatically** = Can be selected for certain contracts where the employee will repeat the contract each year.
• **Contract Begin Date** = the date the contract starts
• **Contract End Date** = the date the contract ends
• **Payment Begin Date** = the date of the first payment
• **Payment End Date** = the date the last payment
• **Actual Start Date** = the date that the actual work starts
• **Termination Date** = the date that the actual work finishes
• **Save** - not used in this mode
• **Return to Search** – used to return to search for another contract
• **Previous in List** – view the previous person in the search list
• **Next in List** – View the next person in the search list
• **Notify** – not used
• **Update Display** – refreshes the screen
• **Update History** – shows all records associated with the contract.
• 1 of X = multiple rows have been added to employee record
• Effective Date = Date transaction happened, could be in past or future dated (90 days out or less)
• Track Actual Earnings – should always be checked
• Use Holiday Schedule – should always be unchecked
• Work Days in Contract – Number of working days in the contract period (automatically calculated)
• Paid to Date – amount paid as of today’s date
• Earned to Date – amount earned as of today’s date
• Days Worked to Date – number of days worked
Appendix – Employment Definitions in PeopleSoft

Regular/Temporary Status:

Regular – a position which is considered to be part of the established staff compliment; will be recurring from year to year.

Short Term Temporary – a position which is established to respond to a temporary increased workload not to exceed 6 months in duration.

Long Term Temporary – a position which is established to respond to a temporary increased workload due to additional short term project or special initiative needs which will extend 6 months or more, but not to exceed 2 years

Seasonal – a position which recurs during high (or peak) work or volume needs typically associated with an established work schedule (can be either full or part time, as defined above); assignment will be of a short duration (not to exceed 5 consecutive months) and occurs during the same time periods from year to year; may be employed as either full or part time during the period in which they are required.

Full/Part Time:

Full Time – designated as working no less than 2,080 hours per fiscal year (40 hours per week, 52 weeks); 1,560 hours per academic year (40 hours per week, 39 weeks); representing a 1.0 FTE. Seasonal staff can be defined as full time during the period in which they are employed; however they are not benefit eligible.

Part Time – less than a 1.0 FTE; if assignment is less than .5 FTE; not benefits eligible; greater than .5 FTE but less than 1.0 FTE is benefits eligible.

PRN – (less than .1 FTE) a position that is established to provide additional staff on an as needed basis due to unexpected staffing shortage to meet workload of area; not benefit eligible; typically paid at a premium rate in recognition of the highly variable nature of the assignment.