How to Set up Employees on Winter Pay

There are several situations that will determine how Winter Pay is set up in PeopleSoft by Departments. Please use the following guide to help you determine how to set up your winter session hires in the PeopleSoft System.

Below is a table that will help you determine which course of action to take and which system in PeopleSoft you will need to use:

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Position Mgmt</th>
<th>TAM (Talent Acquisition Mgmt)</th>
<th>Additional Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Employee, Teaching course in Same Department</td>
<td>Follow Process 1</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Active Employee, Teaching course in Different Department</td>
<td>Follow Process 2</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>New Hire Employee</td>
<td>Follow Process 2</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Terminated Employee</td>
<td>Follow Process 2</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Employee on Hold, Same Dept</td>
<td>Follow Process 1*</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

*Department will need to work with OHR Benefits to take employee off of Hold status in order to set them up with the Winter Session.

1 -A new hire is an employee’s first employment relationship (receiving compensation and, if eligible classification, benefits) with the University.
2 - If an employee is terminated in the system, a rehire occurs when there has been a break in the employee/employer relationship and it is reestablished at some future point in time.

Each System (Position Management, TAM, and Additional Pay) requires specific roles in order to complete the department portion of the work. Departments should follow their current internal business processes to determine how to create the position, job openings and additional pay lines.
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Security Roles

The security roles should be distributed according to the department’s internal business processes. Some users will have all roles; some will have part of them and will need to work with other users in their department to complete the full process.

To request a role, go to: http://asu.edu/oasis/support/Access.html

Position Management:

<table>
<thead>
<tr>
<th>Human Capital Management (HR) - Position Management (PM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ FSO Redistribution</td>
</tr>
<tr>
<td>☐ HCII Dept Financial Mgr</td>
</tr>
<tr>
<td>☐ HCII Dept Position Manager</td>
</tr>
<tr>
<td>☐ HCII Dept Position View</td>
</tr>
<tr>
<td>☐ OHR Position Mgt General User</td>
</tr>
<tr>
<td>☐ OHR Position Mgt Super User</td>
</tr>
<tr>
<td>☐ OHR Position Mgt View</td>
</tr>
</tbody>
</table>

Talent Acquisition:

<table>
<thead>
<tr>
<th>Human Capital Management (HR) - Talent Acquisition (TA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ ASU Recruiter</td>
</tr>
<tr>
<td>☐ Dept Applicant Data Upd</td>
</tr>
<tr>
<td>☐ Dept Applicant Data View</td>
</tr>
<tr>
<td>☐ HR Hiring Manager</td>
</tr>
<tr>
<td>☐ HR Hiring Manager View Only</td>
</tr>
<tr>
<td>☐ Offer Letter Role for Pst Adm</td>
</tr>
<tr>
<td>☐ OHR Recruitment Administrator</td>
</tr>
<tr>
<td>☐ OHR Staffing General User</td>
</tr>
<tr>
<td>☐ OHR Staffing Super User</td>
</tr>
<tr>
<td>☐ Provost Office Hiring Mgr</td>
</tr>
<tr>
<td>☐ Provost Office Hiring Mgr View</td>
</tr>
<tr>
<td>☐ TA Query role for Affirm Action</td>
</tr>
</tbody>
</table>

Additional Pay:

<table>
<thead>
<tr>
<th>Human Capital Management (HR) - Payroll (PY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ HCM Dept Pay Manager</td>
</tr>
<tr>
<td>☐ OHR Payroll General User</td>
</tr>
<tr>
<td>☐ OHR Mandated Deductions</td>
</tr>
<tr>
<td>☐ OHR Payroll Accountant</td>
</tr>
<tr>
<td>☐ OHR Payroll Administrator WF</td>
</tr>
<tr>
<td>☐ OHR Payroll NRA</td>
</tr>
<tr>
<td>☐ OHR Payroll Set Up</td>
</tr>
<tr>
<td>☐ OHR Payroll Super User</td>
</tr>
<tr>
<td>☐ OHR Payroll View</td>
</tr>
<tr>
<td>☐ OHR Time Labor Configuration</td>
</tr>
</tbody>
</table>
Earnings Codes and Paygroups

Earnings codes and Paygroups are the key to getting your hire paid correctly. Please reference these tables as you are modifying or creating the position.

<table>
<thead>
<tr>
<th>Paygroup</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A12</td>
<td>Academic 12 Month Pay</td>
</tr>
<tr>
<td>ACD</td>
<td>Academic 9 Month Pay</td>
</tr>
<tr>
<td>GRD</td>
<td>Graduate</td>
</tr>
<tr>
<td>HRY</td>
<td>Hourly</td>
</tr>
<tr>
<td>SAL</td>
<td>Salaried</td>
</tr>
<tr>
<td>STU</td>
<td>Student Hourly</td>
</tr>
</tbody>
</table>

In addition, specify earnings code if different from default earnings codes in Paygroup:

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>Short Desc</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUM</td>
<td>Summer</td>
<td>Summer Session Salary</td>
</tr>
<tr>
<td>SUP*</td>
<td>Supplement</td>
<td>Supplemental Pay, use for what was considered AUX pay as well as SUP pay.</td>
</tr>
<tr>
<td>WTR</td>
<td>Winter Sal</td>
<td>Winter Instruction Salary</td>
</tr>
</tbody>
</table>

Note: Payroll is moving away from AUX as an Earnings Code. It is still available as a value in the system but we request that you use SUP in its place.
Position Management

Position Management is the key to doing many transactions successfully. You should work within your college/department’s business process when working with the position. For Winter Hires, there are two different processes that are specific to the type of hire you make.

**Process 1: Active Employee in department A, who will be working winter session in department A.**

**Step 1:** Go to ASU Customizations/ASU HCM Custom/ASU Position Management/ Maintain Position Accounting

**Step 2:** Enter the position number tied to the employee working the winter session and hit continue. *If the employee has multiple jobs, please be sure you are using the right position number tied to the appropriate active job in your department.*
Step 3: Enter the effective date, which needs to be beginning of a pay period and for this winter session, would be 12/17/07 and then hit continue.
Step 4: Under **Optional: Earnings-Specific Distribution**, you can either type in WTR or hit the hour glass and search for the earnings code ‘Winter Instruction Salary’
**Step 5:** If you hit the hour glass to search for the Earnings code, you get this screen and you want to look for WTR or Winter Instruction Salary, hit the hyperlink and the field will automatically populate.
**Step 6:** Next you will enter the appropriate Account number to tie to this earnings code to. Please note the Distribution % should always be 100% regardless of the FTE %.
Step 7: Once you have entered the necessary information, hit Save and Submit and this screen will appear.
**Process 2: New Position for New Job Opening**

(All other scenarios noted in chart on page 1 except Active employee teach additional course in Same Dept, see Process 1).

**Create New Position**

*Step 1:* Go to ASU Customizations/ASU HCM Custom/ASU Position Management/Create/Modify Positions

*Step 2:* Click on Create New Position.

*Step 3:* Click Create from Scratch

*Step 4:* Click Return, which appears when you click the Create from Scratch radial. A new screen will appear. Select Faculty from the drop-down that will open up under Empl Class (BOR).
Step 5: Enter appropriate Job Code. (Ex: below uses 894800). If you don’t know the job code, you can click on the hour glass and search for the appropriate title and corresponding job code number.

Step 6: Enter Job Information. **Standard hours for Winter Pay will be 20.**

**IMPORTANT:** Effective date needs to be *beginning of pay period* if using date different from 12/17. For standard hours, if anything less than 40 hours, it will be part time and not always a standard 20hrs. Standard hours are based on course load. Determination should follow internal business protocols.

**General Guide for winter pay:**
Here are some guidelines for the position when you are creating it for Winter Pay. Adjust as required by the position.

**Effective Date:** 12/17/2007  
**Standard Hours:** 20  
**Max Head Count:** 1; OHR is requesting that you create a 1:1 position to job  
**Budgeted FTE:** 0.00; leave as defaulted  
**Full Time/Part Time:** Part time  
**Reg/Temp:** Seasonal
Step 7: Click **Save and Submit**. Write down **Position Number**. Click return to get the confirmation screen.
Fund Position

Step 8: After confirming, click on **Create Distribution Funding**.

![Create Distribution Funding](image)

Step 9: Verify that it is the correct **Position Number** and click **Continue**.
Make sure that **Fiscal Year** = 2008. Enter **Effective Date** as 12/17/2007.

![Position Accounting Distribution](image)
Step 10: Enter Funding Details. Click **Save and Submit**. OHR will process and approve.
Talent Acquisition

This process is the BACKEND and takes the place of the HPR. It is NOT the recruiting process. You should follow all normal hiring procedures.

Creating a New Job Opening

Step 1: Go to Recruiting > Create New Job Opening

Step 2: Select your Business Unit, Dept, and search for the Position Number/job title (this is the position number you created in the above process). Select the position and click Continue.
Step 3: Select the **Template Id** of 1014. This template does not require Job Opening approval and should only be used for *non-staff openings* that have already been filled through the normal recruitment process.

**Job Opening**

Posting Title: Faculty Assoc  
Job Opening Status: 005 Draft  
Position Number: 137780  Faculty Assoc  
Business Unit:  
  B0101 B - Provost Tempe  
Department:  
  B0106 School of Sustainability

**Opening Information**

*Template ID:* 1014  
Job Opening Type: Standard Requisition  
*Created By:* 100094881  Daniel McDonald  
*Date Opened:* 11/05/2007  
*Openings to Fill:* Limited  
*Target Openings:* 1  
*Available Openings:* 1  
Establishment ID: ASU00  Arizona State University  
Business Unit:  
  B0101 B - Provost Tempe  
Company: ASU Arizona State University  
Department:  
  B0106 School of Sustainability  
Location: TEMPE Campus: Tempe
Step 4: Click on Hiring Team Link. Enter Hiring Team. Click Save and Submit.

Note: Job Creator cannot be Hiring Manager. Because there will not be an approval necessary, you can choose a central person as the Hiring Manager.
For searching:
You can search by first name or you can put a % in front of the last name (ex. %webler) to search for the specific person. If there are multiple people with that last name, you will get a red text box and error message, but can click on the search button to select the correct person.

Step 5: Approve Job Opening, which should appear at the bottom of the screen when you submit the opening. Write down Job Opening ID from the top of the page. You might need to scroll back up to the top of the page in order to find this.
Creating Applicant

Step 6: Next go to Recruiting > Add Applicant and create the applicant information. The applicant will be the person you are hiring into the job you created.

There are three ways to enter the data:

1 - For Existing Employee:
First select Employee from Applicant Type then enter EmplID. You may need to ask the person for this number. It will be the 1000 number. The rest of the page will populate automatically once you add their ID into the EmplID field. Click Save and write down Applicant ID from top of page. You may need to scroll back to the top of the page to see this number.

2 - For Students or Terminated Employees:
First select Non-Employee from Applicant Type and then enter EmplID. You may need to get this from the person. It is their 1000 number on their SunCard. Template will automatically populate. Click Save and write down Applicant ID from top of page. You may need to scroll back to the top of the page to see this number.

3 - For New Employees:
Leave Applicant Type as defaulted (External Applicant):
New Employees (cont’d): Fill in the template. Click Save and write down Applicant Id.
New Employees (cont’d): MUST FILL OUT ELIGIBILITY TAB
Step 6b:
On the same page, click on the Eligibility & Identity Link. You can also go to Recruiting > Find Applicants and search on the Applicant ID to get to the link. For issues with the search, see page,
Step 6d: Enter Applicant data as specified. You MUST include Date of Birth, Gender, Ethnicity, and Social Security.
**Linking and Offering the Job**

**Step 7:** Go to Recruiting > Find Applicants. Search on the Applicant ID from the previous step.

**Find Applicants**

- **Job Opening ID:**
- **Applicant ID:** 140975
- **First Name:**
- **Last Name:**
- **Applicant Status:**
- **Applicant Type:**
- **Disposition:**
- **Applied Within:**
- **Applied Between:**

Uncheck checkbox. (if checked)
Change status to blank.

**Step 8:** Link the applicant to the job opening by choosing **Link Applicant to Job** in the **Take Action** drop-down list.
Step 9: Enter **Reason Code** and **Job Opening ID**. Click **Submit**.

**Link to Job Opening**

![Image showing the enter disposition information and enter job openings forms]

**Step 10:** Select **Prepare Job Offer** from the drop down list.
Step 11: Add offer details to the Offer page. You will need to enter the details of the job in the Comments Box:

**Hire Type:** New, Transfer, Additional Job, Rehire*

*Rehire: Define whether (<30days, >30days less than 12mos, >12mos)

**If Visa, please indicate Visa Type with the Hire Type.

**Pay Start Date:** 12/17/2007

**Pay End Date:** 1/13/2008 (end of pay period)

**Paygroup:** ACD, A12, GRD, HRY, SAL, STU (for more information on paygroups and earnings codes, reference page 4.)
Step 12: Click Submit. You may get a warning regarding Base Salary. Click OK.

The Job Offer will be sent to Staffing. They will approve and finalize the process. OHR will then process the data into HRIS and notify you when it is ready for your review and to enter the Additional Pay.

If the employee is a new hire, you will need to have the new hire fill out all appropriate new hire paperwork. OHR will process them into the system once they receive the I-9.
Additional Pay

Entering Additional Pay Records

Navigate to the Additional Pay Data page:
Payroll for North America > Employee Pay Data > Create Additional Pay

This is the Additional Pay Data page where the data for each type of reoccurring pay is entered.

There are three levels to the Additional Pay Page, each marked by a box or frame. The first level is the earnings code level. Each time the earnings code changes you must add another row by using the plus sign. For example if I want to process a Stipend, you would enter STI in the earning code. For winter session, we are using WTR earnings code.

The next level is the effective date. Each Additional Pay earning code will process only based on the most current effective date. For example if you want to pay the stipend beginning on 8/13/2007, you would use this as the effective date. For winter session, please use the beginning of a pay period, 12/17.

The next level is the payment details. This determines how the additional payment will be paid out.

Detailed Example on next page.
Step-by-Step Procedures for Setting Up Additional Pay

The following step-by-step procedures are listed to provide the steps for each of the different types of earnings.

<table>
<thead>
<tr>
<th>Step</th>
<th>Menu/Field/Page</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Main Menu</td>
<td>Navigate to the Additional Pay Data page: <strong>Payroll for North America&gt; Employee Pay Data&gt; Create Additional Pay</strong></td>
</tr>
</tbody>
</table>
| 2.0  | Search Dialog Page | Select the Employee Enter **Empl. ID** – Ten digit # if known or **Name** – (Last Name) Click [Search]. Click on the hyperlink for the employee. 
*The Additional Pay Data page appears.*
### Earnings Code

Click the **Earnings Code** lookup icon - 📚. Select the **earnings code** needed from the list. Listed below are commonly used codes. The lookup icon will display all earnings. In this case we want to use earnings code **WTR**.

### Effective Date

Enter the **Effective Date** as MM/DD/YYYY.

The Default date is the Current Date. All manually entered start dates should be the begin date of the current pay cycle and in this case it should be **12/17/2007**.

### Addl. Seq.#

Every additional pay entry that you set up requires an additional sequence number. The system uses this number to uniquely identify the additional pay and, if necessary, to distinguish it from other rows of data that you set up that have the same earnings code. For example, if you have WTR earnings code from a previous year and you are entering a new WTR code for this year, you will need to use Seq 2.

### End Date

Enter the pay period end date (MM/DD/YYYY) of the last day of the pay period the earnings should no longer be paid.

**USE: 1/13/2008**

### Goal Amount

Enter a goal amount. It will be the **total amount** of the Winter Session pay. This causes the system to stop the additional pay after the amount has been reached.
| Reason | Indicate the reason the employee is receiving additional pay. Although this field is not used for payroll processing, the system generates a new Pay Earnings record for each additional pay earnings code where you have defined a different reason. For Winter Session, use Add Class |
| Earnings | Enter the flat amount to be **paid per paycheck**. Note when you tab out of this field you will see the amount extended. Example: 6500.00 or 6500. would appear as $6,500.00 |
| Hours | Leave Blank |
| Sep Chk # (separate check number) | Leave Blank |
| Disable Direct Deposit | Leave Blank |
| Prorate Additional Pay | Do not Check |
| OK to PAY | Click on the **OK to Pay** box |
| Applies to Pay Periods | For Biweekly paid employees Click the **First** and **Second** and **Third** boxes. |
| 4.0 | Save | Click [Save] at the bottom of the page to save your entry. |
| 5.0 | File Completed Request |