PeopleSoft.

Human Capital Management 9.1 Process Guide

HCM iMpact

DCATS
210-567-7777, Option 5
Information Management Client Support Services

WE MAKE LIVES BETTER
UT HEALTH SCIENCE CENTER
SAN ANTONIO

Training Guide | Version 3| July 2013

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Introduction and Objectives

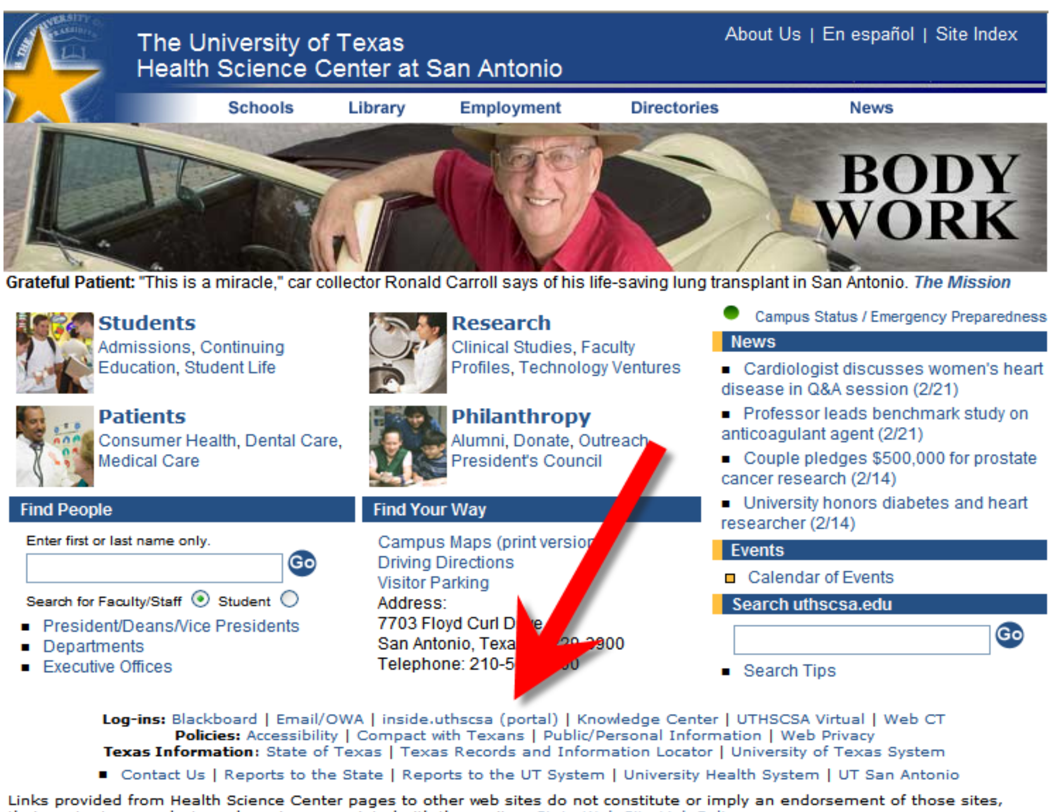
UTHSCSA implemented the Workflow process to assist users in navigating through the various panels needed to make any changes to an employee. The Workflow guides the user through the different panels involved in the making any changes to an employee from the time of new hire through to termination.

The processes we will review are:

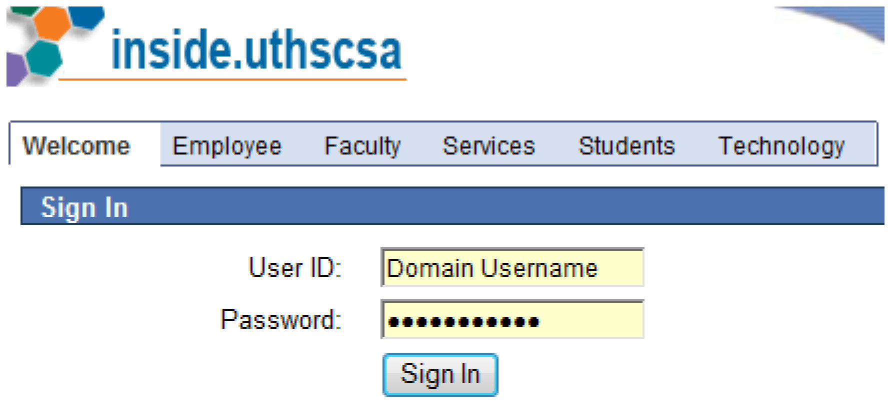
- Describe the New Hire process
- Describe the Concurrent job process
- Describe the Employee Biographical Data process
- Describe the Job Maintenance process

Signing onto the HSC Portal

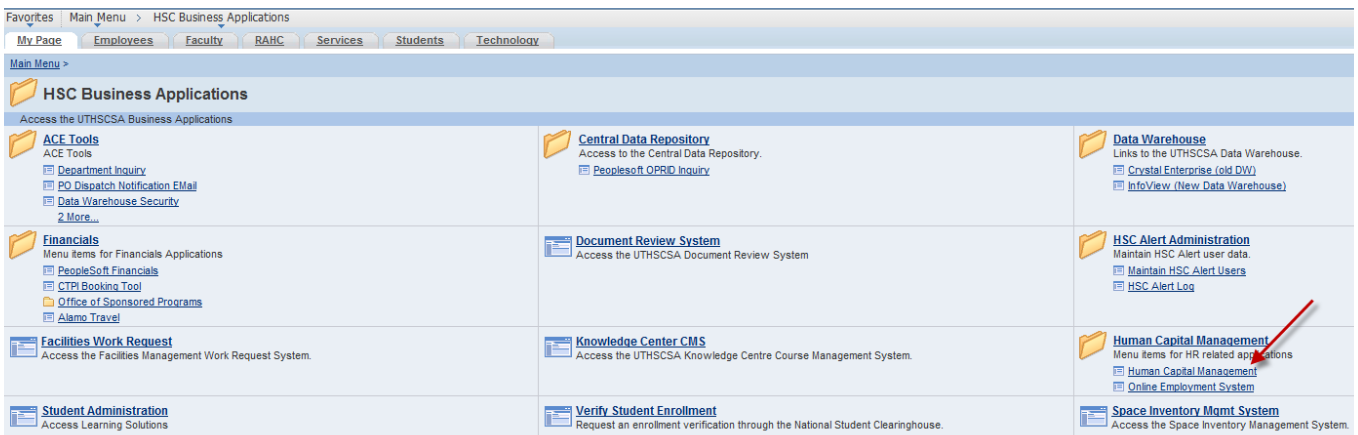
To access **Human Capital Management (HCM) v9.1,** click on the inside.uthscsa (portal) link.



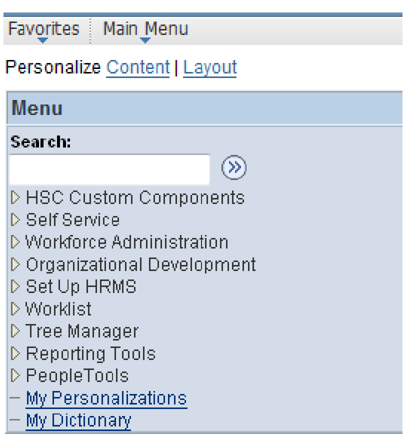
Enter your Domain Username and Password



From the Enterprise Menu, click on the **HSC Business Applications** link. You will see a listing of expanded menu items, click on the sub-level link for **Human Capital Management**.



A new window and menu will display.



A Closer Look at the Portal Menu and its options

Favorites
Clicking on Favorites allows you to view the current Recently Used links within HCM for this session. You also have the ability to save the HCM links to pages that you may use on a daily basis in the My Favorites section.

HSC Custom Components
Clicking on HSC Custom Components allows you to view additional sub-menus. Selecting a sub-menu will display another list of options explained below.

Budget
The HCM User will click on the Budget link to navigate to the Budget Summary and Employee/Position Funding. This is used to access a budget summary for their department or make position changes to an employee's position.

Use

Budget Summary
Employee/Position Funding

HR
User will click on the HR icon to navigate to: Inquire and Use. The HR link is for Users who will need to access an Employee Summary or to access the Employee Review.

Inquire

HSC Employee Summary

Use

HSC Employee Review
HSC Tenure Data
HSC General Comments
HSC Merit Increases

Person of Interest
Users will click on Person of Interest to navigate to: Person of Interest Form. The Person of Interest link is for Users who will need to request a Person of Interest for their department.

Use

Person of Interest Request

Planning Budget
User will click on Planning Budget to navigate to: Category Summary, Non-Salary Category update and Position Budgets.

Use

Position Budgets

Position Management
User will click on Position Management to navigate to: Create Position, Modify Position, Inactivate/Activate a Position or Position Data. The Position Management link is for

Users who will need to create a position, modify a current position or inactivate or activate a position and to view the department’s positions.

Use

Create Position
Modify Position
Inactivate/Activate a Position
Position Data

Self Service

Clicking on Self Service allows you to view and choose sub-menus. By clicking on each of the sub-menus you will be directed to another list of options. Self Service is available to all UT Health Science Center employees. Each sub-menu is explained below.

Personal Information

User will click on Personal Information to navigate to: Personal Information Summary. This link is for Users to review and update personal information: address, phone numbers, emergency contact information, email addresses, or marital status.

Personal Information Summary

Payroll and Compensation

User will click on Payroll and Compensation to navigate to: View Paycheck. This link is available to all UTHSC employees needing to review/print a copy of their current and prior pay stubs.

View Paycheck
W-4 Tax Information
View W-2/W-2c Forms
W-2/W-2c Consent
W-2 Reissue Request

Benefits

User will click on Benefits to navigate to: Dependents and Beneficiaries, or Benefits Summary. A UTHSC employee can view their current dependents and beneficiaries in addition to viewing current benefits.

Benefits Summary
Dependent/Beneficiary Info
Benefits Enrollment

Workforce Administration
Clicking on Workforce Administration allows you to view and choose sub-menus. By clicking on each of the sub-menus you will be directed to another list of options. Each sub-menu is explained below.

Personal Information
User will click on Personal Information to navigate to: Modify a Person, Biographical, Organizational Relationships, and Personal Relationships. These links will allow you to maintain information about a person, regardless of Jobs.

Biographical
- Modify a Person
- Additional Names
- General Comments

Organizational Relationships
- Maintain a Person's POI Reltn
- Person Checklist
- Person Assignment Checklist

Personal Relationships
- Emergency Contact

Job Information
User will click on Job Information to navigate to: Review Job Information. This link will allow you to maintain information about a person tied down to a specific job record.

Job Data
Review Job Information
- Workforce Job Summary
- Multiple Jobs Summary

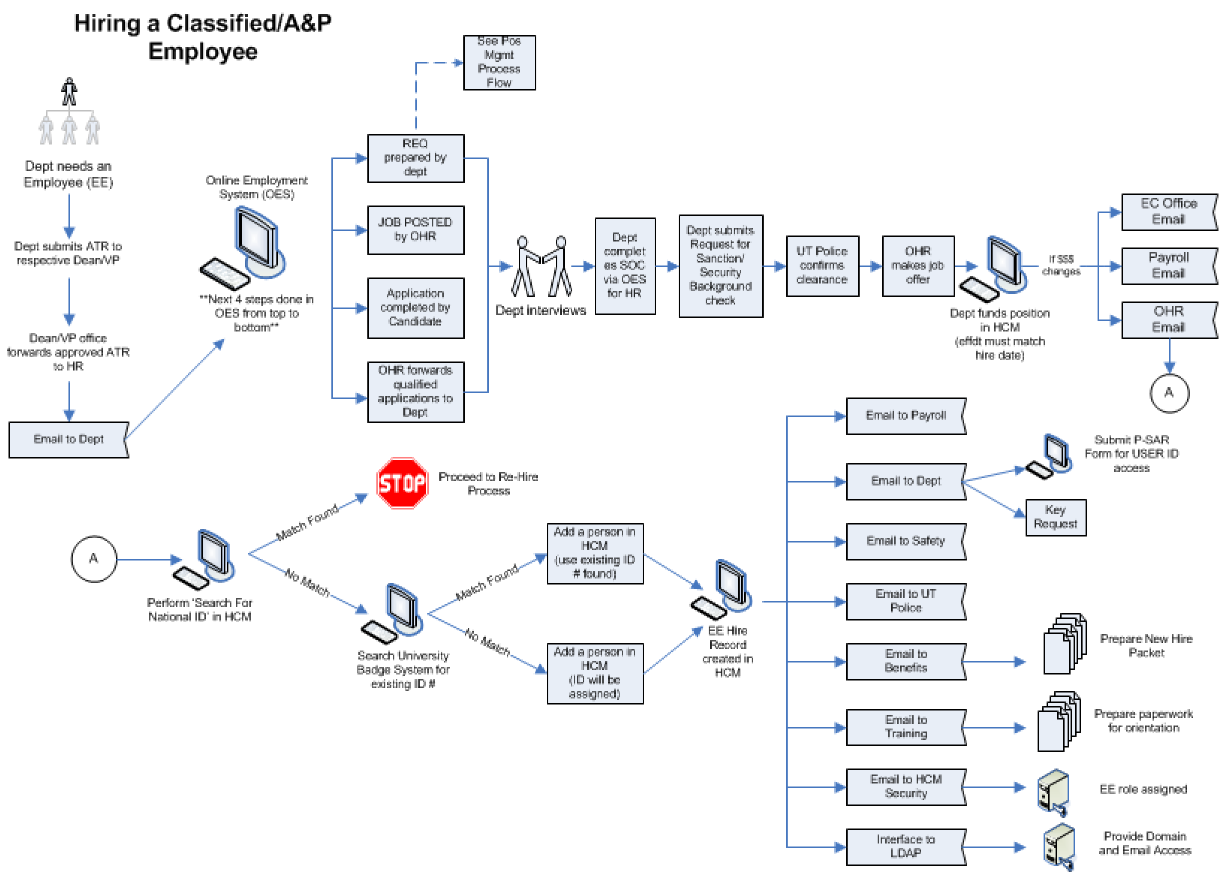
Organizational Development
Clicking on Organizational Development allows you to view and choose sub-menus. By clicking on each of the sub-menus you will be directed to another list of options. Each sub-menu is explained below.

Review Position/Budget Info
- Position Summary
- Position History
- Budget Status
- Vacant Budgeted Positions

Reporting Tools
Clicking on Reporting Tools allows you to view and use select queries to gather information.

Query Viewer

Chapter 1 – New Hire



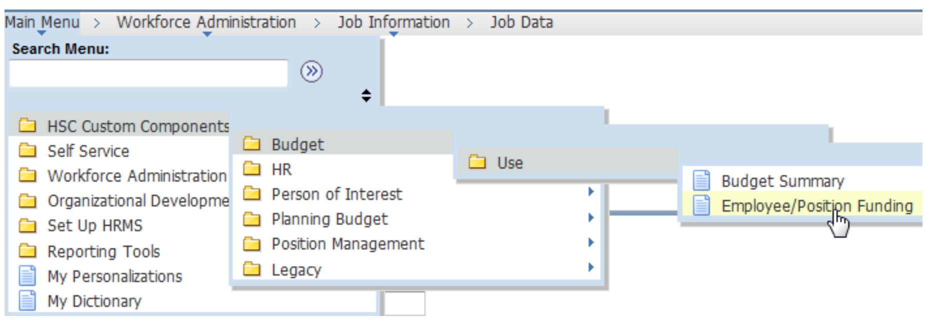
What is a New Hire?

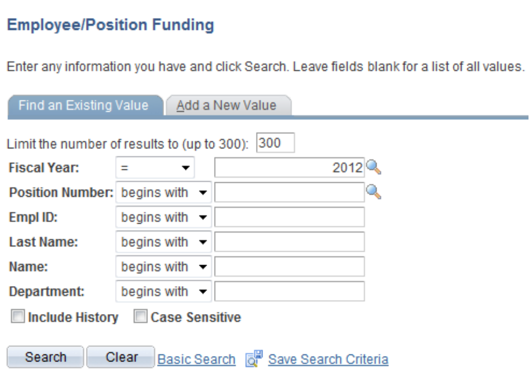
New Hire definition: A person who has never been employed by UTHSCSA or a person terminated before September 1, 2000. If the employee has a prior work record with the Health Science Center after September 1, 2000, the employee should be entered as a Re-hire.

Note: ***The position must already been created or modified in HCM prior to funding the position.*** If a position must be created, please submit a PCM Create form in HCM. If a position requires modification, please submit a PCM Modify form in HCM. Upon approval, the Budget office will forward the request to Human Resources. OHR will either add the new position to your budget or modify the existing position. A system generated email notification will be sent to the department. At that point, ***the department must proceed with funding the position before OHR can enter the New Hire status in HCM***.

Use the following navigation path to access the Employee / Position Funding search menu:

HSC Custom Components>Budget>Use>Employee/Position Funding





- Employee/Position Funding
  - *If this is a new position or has not been funded, click the Add a New Value tab* and complete the necessary fields
  - Verify the **fiscal year**.
  - Enter position number to be funded
  - Click on **Search**

If you are not automatically directed to the Position Funding page, once you click on search you may see the following screen if the position has been funded within that FY. Click anywhere within the line to bring up the position.

Search Results

View All First 1 of 1 Last

SetID	Fiscal Year	Position Number	EmplID	Name	Department
HSCSA	2011	70001510	(blank)	(blank)	TR15

- Click on the **add a row** icon
- Enter in **Effective date** (date of hire)
- **Earn Code:** There are certain earn codes that are appropriate to use on this panel. Use the drop down arrow to see the Earning Code list for more information. This most common one is REG (regular pay) followed by AUG (augmentation).
- **Combination Code**
- **Percent Effort:** Enter or change the percent effort that is applicable for this position. Note: If the field is not required for the earn code entered, then it will be grayed out (e.g., AUG). If there is more than one account code for this position, the *total* percent effort must match the position's total FTE.
- **Annual Rate:** Enter or change the annual rate for this position. The annual rate is the same for each row where the percent effort is not grayed out.
- **Funding End Date:** This is the end date for the funding source. When using a state account code, the end of the fiscal year is your end date. When using a grant account code, the end of the grant is your end date.
- Click on **Save**

Workflow email will be generated to the department and to OHR who will place the selected candidate into your position.

*Note: If you fund a vacant position, payroll will also receive a workflow email

This completes the departmental portion of a New Hire.

Chapter 2 – Concurrent Job

This process involves hiring employees appointed to two or more positions at the Health Science Center.

Cross–Appointment(s):
At least two or multiple positions in different departments with 0% FTE in WOS pay group for each position.

Joint–Appointments(s):
At least two or multiple positions in different departments with 1%+ FTE sharing identical pay groups for each position. If the pay groups are not identical, the employee's benefits will be adversely affected.

In PeopleSoft, employees occupying two or more positions are said to have concurrent jobs. This process requires coordination between the home department and the host department(s). Before you fund a CCJ, you must request the below information from the home department.

- Employee ID
- Employee record number
- Date of hire in home department
- Pay group
- Percent time
- Benefits Eligibility

Home Department

The Home Department is the department that initially hires/appoints the employee and provides the primary appointment for the employee. The Home Department must always maintain the Academic role for Faculty appointments. Administrative roles may also be maintained by the Home Department. Communication is very important between the Home Department and the Host Department(s) and should be initiated by the Home Department.

Host (Concurrent) Department

The Host Department is any department providing an additional appointment for an employee. The Host Department may maintain the Administrative role when the Host Department is a Center or Institute.

Empl Records

In PeopleSoft, Empl Rcd 0 (Employee Record number zero) is generally associated with the employee's Primary Department that maintains the Administrative role. The Empl Rcd 0 denotes the default check route.

The first position into which an employee is hired is accomplished using the New Hire Process and is assigned Empl Rcd 0 by PeopleSoft. All subsequent positions into which an employee is hired will be accomplished using the Concurrent Job Process and will be assigned an Empl Rcd number greater than zero.

Remember:

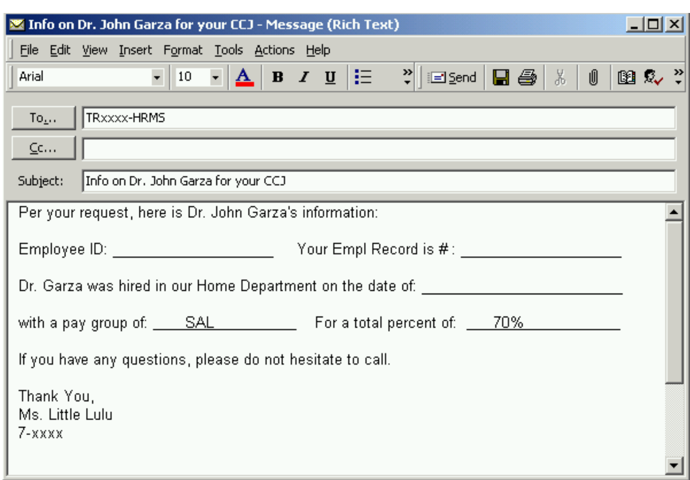
- **Each position an employee occupies must have a separate Empl Rcd number.**
- **Empl Rcd 0 = Primary/Administrative Appointment only**

How to Change the Check Route

By default, the department associated with Empl Rcd 0 (The Home Dept) is the default check route in PeopleSoft. If the employee desires a different check route, submit an e-mail to the Payroll Office at PAY-Admin@uthscsa.edu. In the e-mail, you must provide the following information:

- The employee's Empl ID (employee identification number)
- The employee's name
- The default check route (the Home department ID)
- The ID of the department which will be the new check route

Before beginning the CCJ business process, confirm that the home and host departments have communicated. Below is a sample email:



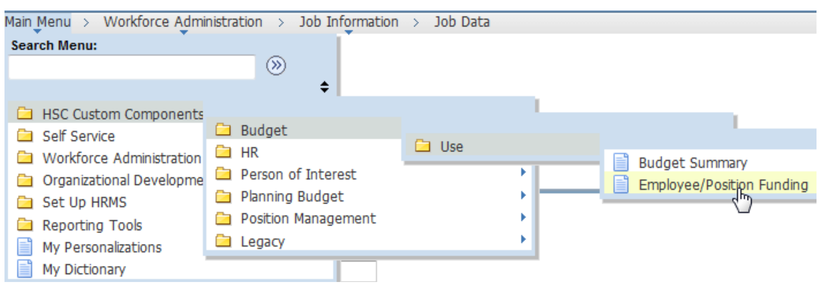
For each cross appointed employee, it is important to remember the employee's pay group MUST MATCH the pay group listed in their home department. Positions with a pay group of WOS are the only exceptions. If this procedure is not followed, it causes an overstatement of benefit deductions to that particular employee.

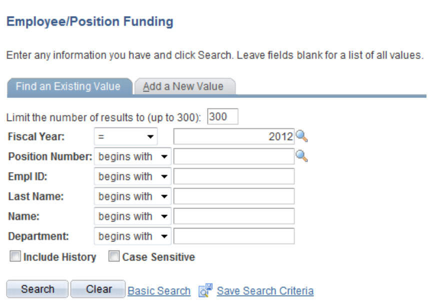
Suggestion: The Home department can e-mail the Host department with the Empl ID and the Employment Rcd Nbr. This allows both departments to have a record of the transaction.

The Home department is responsible for maintaining the employee's personal data in PeopleSoft. Before a concurrent job can be added for an employee, the Home department must have completed the hiring of the employee into his/her primary appointment (Empl Rcd Nbr 0).

Steps to funding a CCJ (Concurrent Job) are exactly the same as funding a New Hire.
Use the following navigation path to access the Employee / Position Funding search menu:

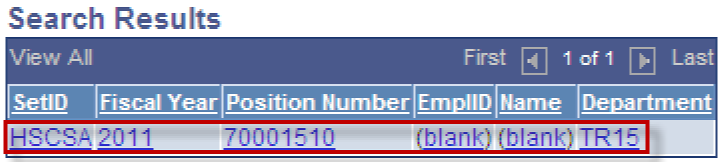
HSC Custom Components>Budget>Use>Employee/Position Funding





- <u>Employee/Position Funding</u>
    - *If this is a new position or has <u>not been funded</u>, click the Add a New Value* and complete the necessary fields
    - Verify the **fiscal year**.
    - Enter position number to be funded
    - Click on **Search**

If you are not automatically directed to the Position Funding page, once you click on search you may see the following screen if the position has been funded within that FY. Click anywhere within the line to bring up the position.



- Click on the **add a row** icon (top-right corner)
- Enter in **Effective date** (date of hire)
- **Earn Code:** There are certain earn codes that are appropriate to use on this panel. Use the drop down arrow to see the Earning Code list for more information. This most common one is REG (regular pay) followed by AUG (augmentation).
- **Combination Code**
- **Percent Effort:** Enter or change the percent effort that is applicable for this position. Note: If the field is not required for the earn code entered, then it will be grayed out (e.g., AUG). If there is more than one account code for this position, the *total* percent effort must match the position's total FTE.
- **Annual Rate:** Enter or change the annual rate for this position. The annual rate is the same for each row where the percent effort is not grayed out.
- **Funding End Date:** This is the end date for the funding source. When using a state account code, the end of the fiscal year is your end date. When using a grant account code, the end of the grant is your end date.
- Click on **Save**

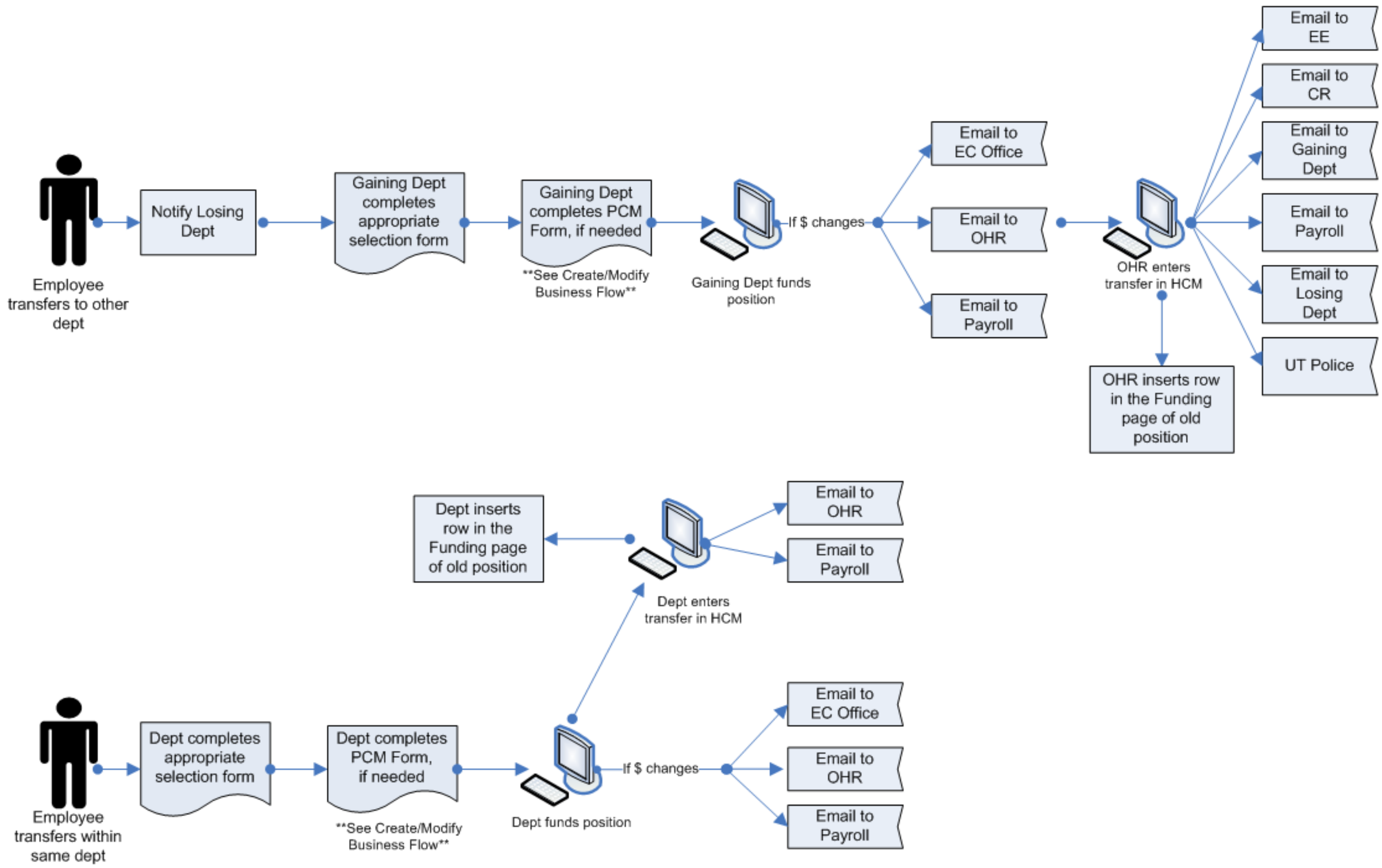
Workflow email will be generated to the following areas: OHR who will place the selected candidate into your position.

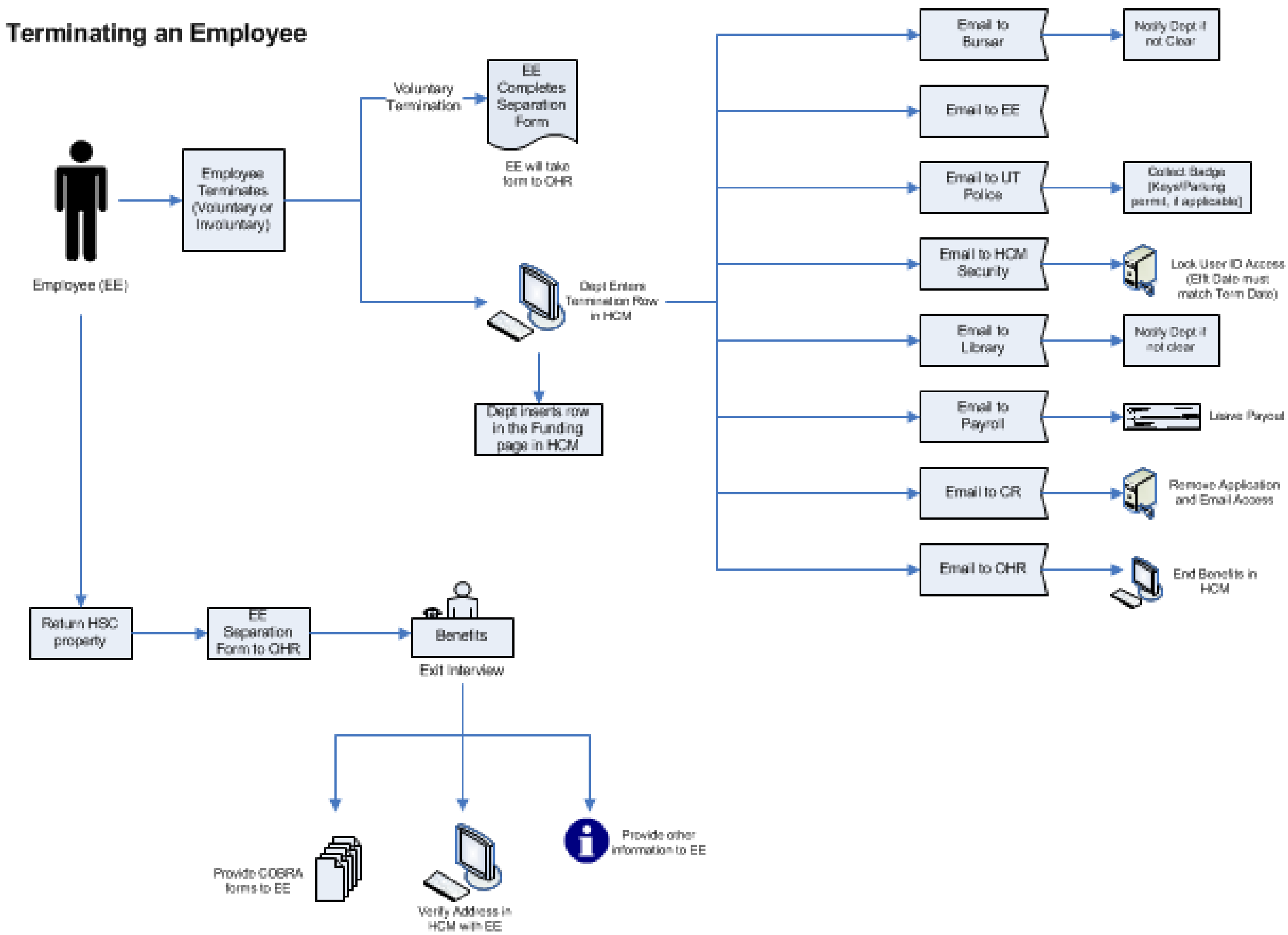
*Note: If you fund a vacant position, payroll will also receive a workflow email

This completes the departmental portion of a Concurrent Job.

Chapter 3 – Job Maintenance

Job Maintenance for Position Change



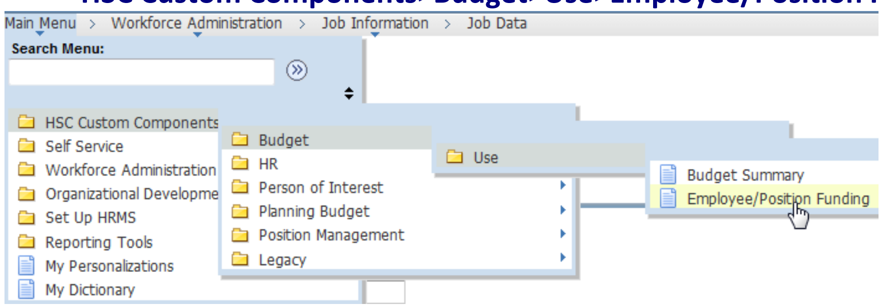

Terminating an Employee
Employee (EE)
Employee Terminates (Voluntary or Involuntary)
Voluntary Termination
EE Completes Separation Form
EE will take form to OHR
Dept Enters Termination Row in HCM
Dept inserts row in the Funding page in HCM
Email to Bursar
Notify Dept if not Clear
Email to EE
Email to UT Police
Collect Badge (Keys/Parking permit, if applicable)
Email to HCM Security
Lock User ID Access (Eff Date must match Term Date)
Email to Library
Notify Dept if not clear
Email to Payroll
Leave Payout
Email to CR
Remove Application and Email Access
Email to OHR
End Benefits in HCM
Return HSC property
EE Separation Form to OHR
Benefits
Exit Interview
Provide COBRA forms to EE
Verify Address in HCM with EE
Provide other information to EE

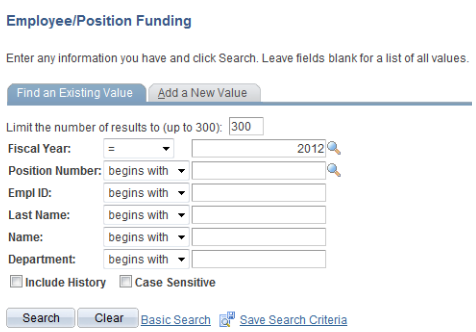
Example of a Promotion

Promotion: The movement of an employee from one position to another position at a higher rank. The department will need to update the funding information on the position and also the job maintenance on the employee page. **When processing a promotion within your department, you will begin with the <u>NEW</u> position number, not the current position number.**

*Note: Position must already be modified in HCM prior to funding the position.
Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding



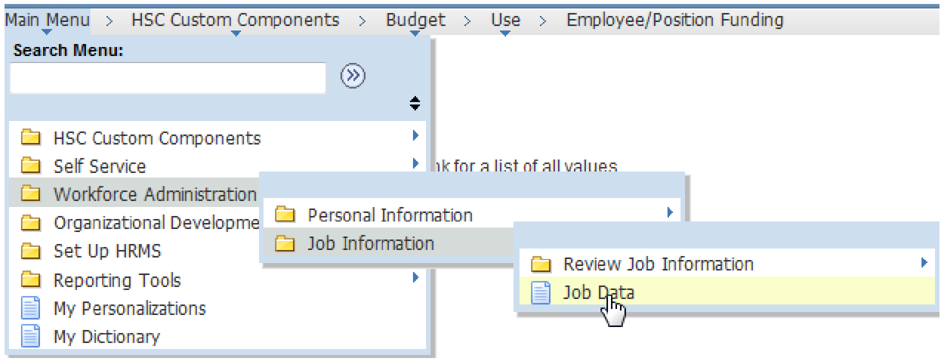


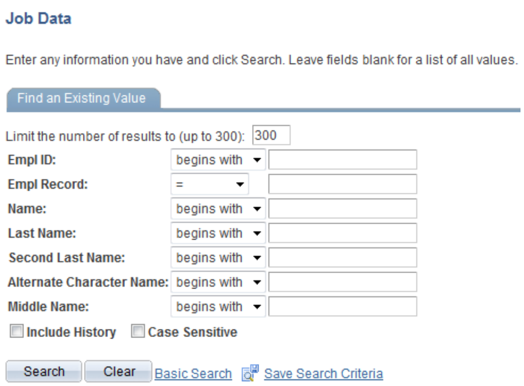
- <u>Employee/Position Funding</u>
  - Verify **fiscal year**
  - Enter the position number
  - Click on **Search**
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date** (Date must match the date of promotion)
    - Change Annual Rate
    - Click **Save**

<u>Workflow will be generated to the following areas: OHR and Payroll for informational purposes only.</u>

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data





- Job Data
  - Enter in the EmplID
  - Click on **Search**
  - On the Work Location page, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**

*Note-Effective Date on Work Location must match Effective Date on Funding Row

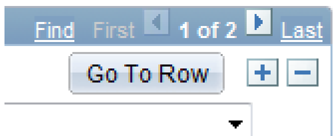
    - **Action/Reason**
    - **Position Number:** Enter in the position number the employee is being promoted **into**
    - Click on **Save**

This completes the departmental portion of a Promotion.

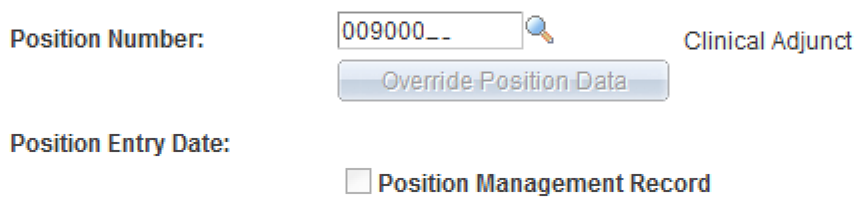
***<u>NOTE:</u>** On the Workforce Administration/Job Data page, you will see a "Go To Row" button. This button is used if you have more than one page in the employee's history.

Example: 1 of 10

You will enter the page number you want to be directed to instead of clicking on the Left or Right arrows.



Also on the Job Data page is an "Override Position Data" button. This is not used by the front office users. It is for the Office of Human Resources. This button should be grayed out, if it is available, do not click on this button.



Example of a Data Change

This action is used to record changes to the funding source, funding end date, etc.

The department will need to update the funding information on the position and also the job maintenance on the employee page.

Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
  - Verify fiscal year
  - Enter the position number
  - Click on **Search**
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**

*Note-Effective Date on Work Location must match Effective Date on Funding Row

- Change Combination Code
- Click **Save**

Workflow email will be generated to the following areas: OHR and Payroll for informational purposes only.

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- Job Data
  - Enter in the EmplID
  - Click on **Search**
  - On the **Work Location page**, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**

*Note-Effective Date on Work Location must match Effective Date on Funding Row

- **Action/Reason**
- Click on **Save**

This completes the departmental portion of a Data Change.

Example of Leave Of Absence

This action is used to record time off granted to an employee without pay. PLOA is ONLY for Military Leave. If you have an employee in a CCJ that is funded, it must also be LOA.

*Note: An individual cannot be placed on LOA unless **ALL** pools are exhausted.*

The department will need to update the funding information on the position and also the job maintenance on the employee page.

Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
  - Verify fiscal year
  - Enter the position number
  - Click on **Search**
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**(The effective date should be the last day worked, plus 1 day)
    - Verify/edit funding row
    - Click **Save**

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- Job Data
  - Enter in the EmplID
  - Click on **Search**
  - Select Empl Rcd Nbr **0**
  - On the Work Location page, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**

*Note-Effective Date on Work Location must match Effective Date on Funding Row

- Enter in **Action / Reason**
- Enter Expected Return Day
- Click on **Save**

Workflow email will be generated to the following areas: Employee, Payroll, Benefits and the requesting Department.

This completes the departmental portion of a Leave Of Absence.

Example of a Return From Leave

This action is used to record the return of an employee from LOA, to active payroll status.
Note: *We strongly suggest an individual not be placed back on payroll (RLOA) until you see them in the office to confirm their physical return.*

The department will need to update the funding information on the position and also the job maintenance on the employee page.

Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
    - Verify fiscal year
    - Enter the position number
    - Click on **Search**
    - On the Position Budget page, enter the following:
        - Click on the **Add a row** icon
        - Enter in the **Effective date** (Date must be the date the employee reported to the office for work)
        - Verify/edit funding row
        - Click **Save**

Workflow email will be generated to the following areas: OHR and Payroll.

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- Job Data
    - Enter in the EmplID
    - Click on **Search**
    - On the Work Location page, enter in the following:
        - Click on the **Add a row** icon
        - Enter in the **Effective date** (same as Position Funding Effective date)

*Note-Effective Date on Work Location must match Effective Date on Funding Row

- Enter in **Action / Reason (Return From Leave)**
- Expected date of return is removed
- Click on **Save**

This completes the departmental portion of a Return from leave of absence.

Example of a Termination

This action is the separation from employment of a UTHSCSA employee from one or more positions. Terminations of concurrent jobs are the responsibility of each host department who granted the appointment.

If the primary job (Home Department) is terminating, and the concurrent jobs will remain active, the host department must contact OHR (Office of Human Resources) to rotate the employee records.

The department will need to update the funding information on the position and also the job maintenance on the employee page.

Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
  - Verify fiscal year
  - Enter the position number
  - Click on **Search**
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date** (the date will be the last day worked, plus one)
    - Click **Save**

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- Job Data
  - Enter in the EmplID
  - Click on **Search**
  - On the Work Location page, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date** (the date will be the last day worked, plus one)

*Note-Effective Date on Work Location must match Effective Date on Funding Row

- Enter in **Action / Reason**
- Click on **Save**

Workflow email will be generated to the following areas: Department, Employee, Bursars, UT Police, Library, Payroll, Computing Resources, Office of Human Resources, and HCM security.***

This completes the departmental portion of a Termination.

Example of a Position Change

*An **<u>inTRAdepartmental</u>** transfer **<u>from one position to another, within the same department</u>**. This transfer can be completed by the department only if <u>both</u> positions belong to the same department.*

*An **<u>inTERdepartmental</u>** transfer is a move from **<u>one department to another</u>** (Job Data Entry made by HR only).*

The department will need to update the funding information on the position and also the job maintenance on the employee page. After completing these steps, the department also needs to clear out the old position.

***Note:** Position must already be modified in HCM prior to funding the position.

Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- <u>Position Funding</u>
  - Verify fiscal year
  - Enter the new position number the employee is being transferred into
  - Click on Search
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**
    - Verify/edit funding row
    - Click **Save**

<u>Workflow email will be generated to the following areas: OHR and Payroll.</u>

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- <u>Job Data</u>
  - Enter in the **EmplID**
  - Click on **Search**
  - On the Work Location page, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**

  *Note-Effective Date on Work Location must match Effective Date on Funding Row
    - Enter in **Action / Reason** (**“New Position”**)
    - Enter in the **<u>new</u> position number the employee** is being transferred into
    - Click on **Save**

After completing the above steps, the department must clear out the old position to show status of Vacant. This rule ONLY applies when the position change occurs within your department.

To clear out the old position:
Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- Position Funding
    - Verify fiscal year
    - Enter the old **position number** the employee **was in**
    - Click on **Search**
    - On the Position Budget page, enter the following:
        - Click on the **Add a row** icon
        - Enter in the **Effective date** to show the position is vacant

*Note-Effective Date must match Effective Date on Work Location

- Click **Save**

This completes the Position Change within department.

Example of a Transfer

A Transfer is an ***interdepartmental*** *move from* ***one department to another*** *(Job Data Entry made by HR only).*

If the transfer is from one department to a different department, the department receiving the transfer employee will need to fund their position. OHR will place the transferring employee into the position. ***OHR will update the funding row which will vacate the losing department's position.***

This completes the Transfer to another department.

Example: Rehire into same department

Rehire of a former employee of HSC is someone who has been terminated (not retired) from the UTHSCSA on or after September, 1st, 2000. A department must have an employees' PeopleSoft Employee ID number before entering a Rehire into PeopleSoft. (Please note, once an employee has a PeopleSoft emplID number assigned to them, it remains with them permanently even when terminated). If a previous employee last worked in the same department that wants to re-hire this person, the employee records and PeopleSoft Employee ID number will be accessible to the hiring department.

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
  - Verify **fiscal year**
  - Enter the position number
  - Click on **Search**
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**
    - Update Combination code and Funding
    - Click **Save**

Workflow will be generated to the following areas: OHR and Payroll for informational purposes only.

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- Job Data
  - Enter in the EmplID
  - Click on **Search**
  - On the Work Location page, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date**

*Note-Effective Date on Work Location must match Effective Date on Funding Row

    - **Action/Reason**
    - **Position Number:** Enter in the position number the employee is being hired into
    - Click on **Save**

This completes the departmental portion of a Rehire-Same Department.

Example: Rehire in a different department

If the department a previous employee last worked in is different than the department rehiring the person, the employee records and PeopleSoft Employee ID number will not be accessible to the hiring department

Note: The department will fund the position. HR will place the employee in the departments' position upon completion of position funding row.

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
  - *If this is a new position or has not been funded, click the Add a New Value tab* and complete the necessary fields
  - Enter **fiscal year**.
  - Enter position number to be funded
  - Click on **Search**
  - Click on the **add a row** icon
  - Enter in **Effective date**
  - **Earn Code:** There are certain earn codes that are appropriate to use on this panel. Use the drop down arrow to see the Earning Code list for more information. This most common one is REG (regular pay) followed by AUG (augmentation).
  - **Combination Code**
  - **Percent Effort:** Enter or change the percent effort that is applicable for this position. Note: If the field is not required for the earn code entered, then it will be grayed out (e.g., AUG). If there is more than one account code for this position, the *total* percent effort must match the position's total FTE.
  - **Annual Rate:** Enter or change the annual rate for this position. The annual rate is the same for each row where the percent effort is not grayed out.
  - **Funding End Date:** This is the end date for the funding source. When using a state account code, the end of the fiscal year is your end date. When using a grant account code, the end of the grant is your end date.
  - Click on **Save**

Workflow email will be generated to the department and to OHR who will place the selected candidate into your position.

This completes the departmental portion of a Rehire-Different Department.

Example of a Retirement

The separation of employment of a UTHSCSA employee from all positions and has been approved for annuity benefits from Teacher Retirement System or the Optional Retirement Plan.

Use the following navigation path to access the Position Funding menu:

HSC Custom Components>Budget>Use>Employee/Position Funding

- Employee/Position Funding
  - Verify fiscal year
  - Enter the position number
  - Click on **Search**
  - On the Position Budget page, enter the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date** (the date will be the last day worked, plus one)
    - Click **Save**

Use the following navigation path to access the Job Data menu:

Workforce Administration>Job Information>Job Data

- Job Data
  - Enter in the EmplID
  - Click on **Search**
  - On the Work Location page, enter in the following:
    - Click on the **Add a row** icon
    - Enter in the **Effective date** (the date will be the last day worked, plus one)

  *Note-Effective Date on Work Location must match Effective Date on Funding Row

    - Enter in **Action / Reason**
    - Click on **Save**

Once an employee has been retired, you will no longer be able to view the employee in the Budget Summary panel.

This completes the departmental portion of a Retirement.

Information for Tenure Status page

The Tenure Data Page provides a Faculty's Track Start Date, Rank/Sts Change Effect and Granted Date.

Use the following navigation path to access and view the Tenure Data information.

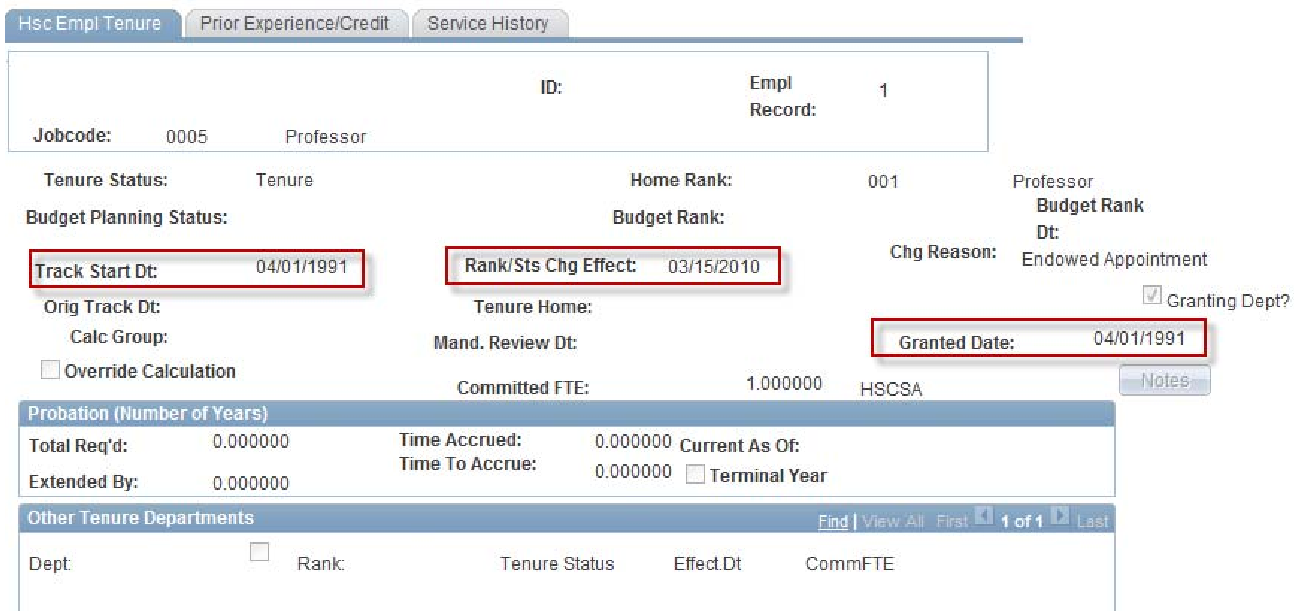
Go to HSC Custom Component→HR→USE→Tenure Data

Track Start Date: Will identify the date when Tenure Tracking began

Ranks/ Sts Chg Effect: Will identify the date of last Job Title Change

Granted Date: Will identify the date when Tenure Status was granted

Note: The Track Start Date and Granted Date will not necessarily be the same.



Information for Workforce Job Summary page

The Workforce Job Summary page provides general Job Information, Work Location, Salary Plan and Compensation for a Faculty and Staff employee.

Use the following navigation path to access the Position Funding menu:

Workforce Administration →Job Information→Review Job Information→Workforce Job Summary

When clicking on the <u>Expand View Option</u>. The five tabs are combined providing a view of ONE page of information.

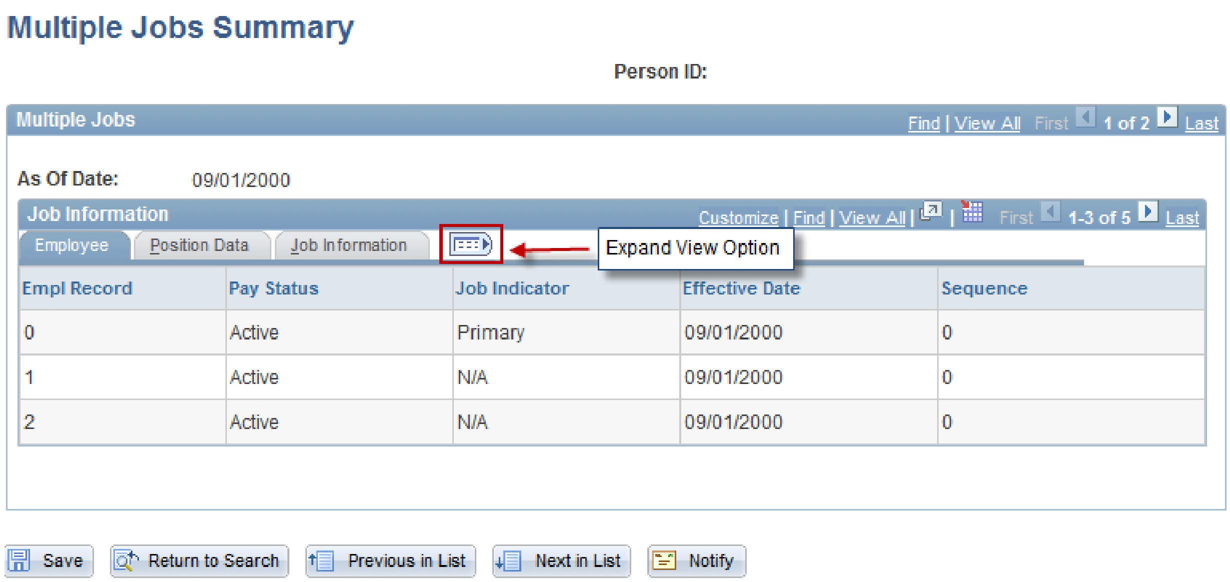
The Go To Job column will take you to the Job Data page that was entered for that particular transaction.

Information for Multiple Job Summary page

The Multiple Job Summary page provides a listing of jobs one employee has occupied.

Use the following navigation path to access the Position Funding menu:

Workforce Administration →Job Information→Review Job Information→ Multiple Job Summary


Multiple Jobs Summary

Person ID:

Multiple Jobs — Find | View All First 1 of 2 Last

As Of Date: 09/01/2000

Job Information — Customize | Find | View All | First 1-3 of 5 Last

Employee | Position Data | Job Information — Expand View Option

Empl Record	Pay Status	Job Indicator	Effective Date	Sequence
0	Active	Primary	09/01/2000	0
1	Active	N/A	09/01/2000	0
2	Active	N/A	09/01/2000	0

Save | Return to Search | Previous in List | Next in List | Notify

When clicking on the Expand View Option. The five tabs are combined providing a view of ONE page of information.

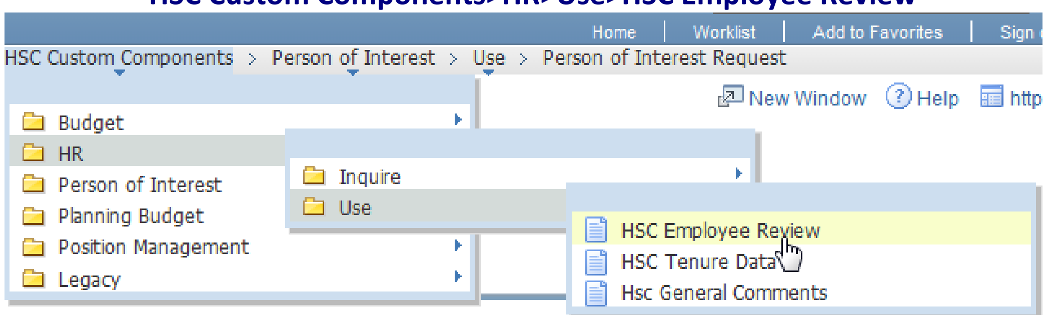
Chapter 4 – Performance Evaluations

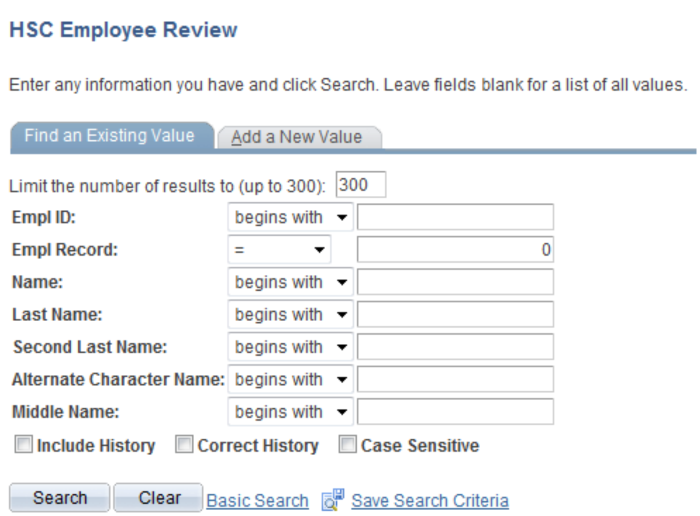
Every year each department is responsible completing annual performance evaluations for all Non-Faculty and Non-Probationary employees. This process includes having a conversation with your employee that references performance for the fiscal year and goals for the next fiscal year.

After you have completed meeting with your employees, you must enter the information into PeopleSoft HCM.

Use the following navigation path to access the HSC Employee Review:

HSC Custom Components>HR>Use>HSC Employee Review



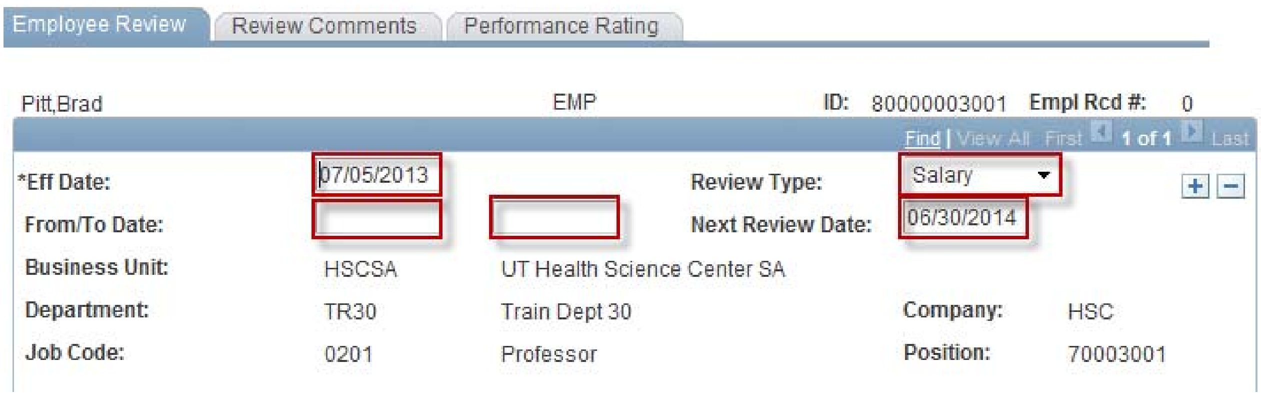


- <u>HSC Employee Review</u>
  - Enter the Emplid or Last Name
  - Click on **Search**
  - **You must complete all three tabs for the review**
    - Click on Employee Review tab:
    - Enter correct date of review

Note: If this is the first review for the employee, the effective date will default to today's date. Do not insert a row. Simply type in the correct date of the review and continue.

If the employee has been reviewed before, the last review date will show. Insert a new row then type in the correct effective date of the review and continue.

- Review Type is Annual
- From/To Date: Change these to be the next fiscal year
- Click SAVE on the bottom left corner



- Click on Review Comments tab
- Enter the Supervisor's employee id number into the Reviewer ID field. If it is unknown, click on the search icon to search for it.
- Click Save in the bottom left corner

- Click on Performance Rating tab
- Select whether this employee is a Supervisor or Non-Supervisor
- Enter RAW score in Points field; **DO NOT** enter the average score in this field.
- Click Save in the bottom left corner
- Click on Return to Search or Next in List to continue to the next employee

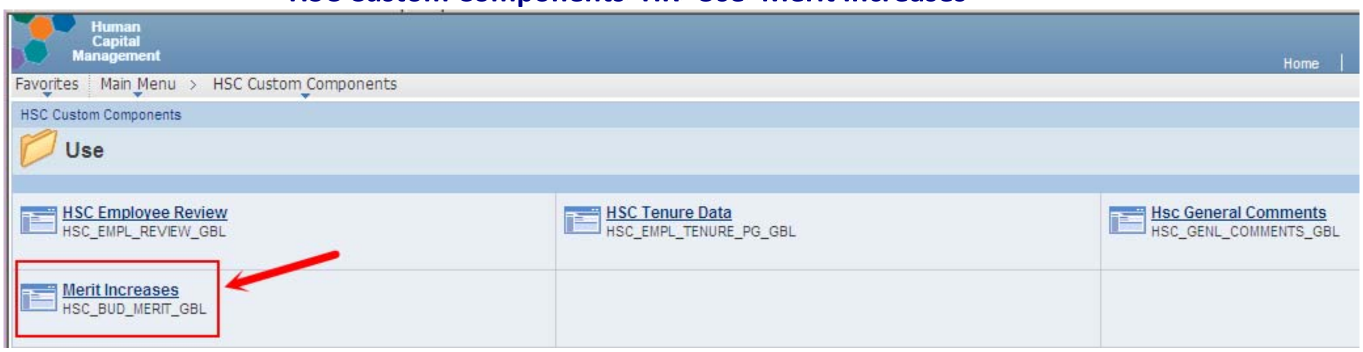
This completes the departmental portion of entering Performance Evaluations.

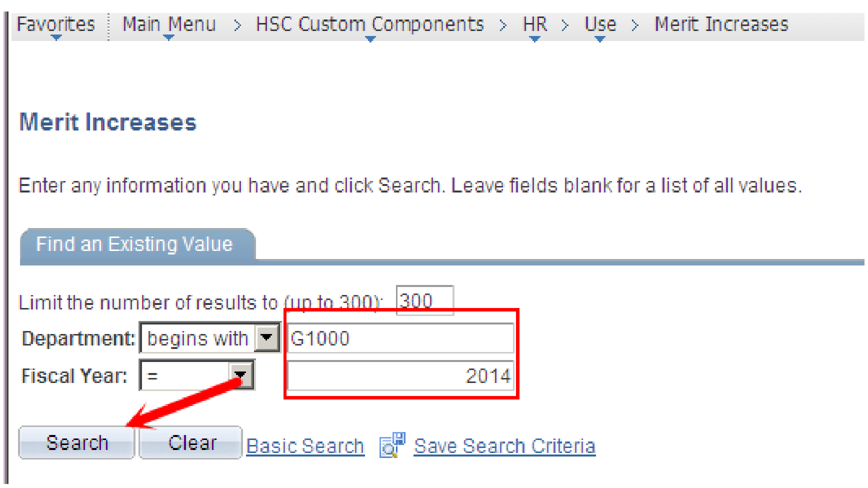
Chapter 5 – Entering Merits into PeopleSoft HCM

The Merit page in PeopleSoft HCM will only be available for entry at the announcement of the Budget and Planning Office. After the window for entry is passed, departments will not be able to enter data.

Use the following navigation path to access the Request to Inactivate/Activate a Position:

HSC Custom Components>HR>Use>Merit Increases





- Merit Increases
  - Enter the Deptid and the Fiscal Year (Leave the Deptid field blank to view a listing of all Deptid's you have access to)
  - Click on **Search**
  - A listing of eligible employees will be displayed for the Deptid entered. You cannot add employees to this listing.

Note: Only employees that meet the merit requirements will be listed on the HCM Merit Increases page.

- Enter the Proposed Annual Rate for each employee that will receive a merit increase (Users may enter merit notes if needed)

Note: The HCM merit page was designed to capture merits at the position level. The proposed annual rate should reflect the full HSC funded portion of the position regardless of the funding owner. However, the department user must include a comment in the Dept/EC Merit Note indicating how much, if any, of the merit will be funded by an outside department and include the name of the outside department.

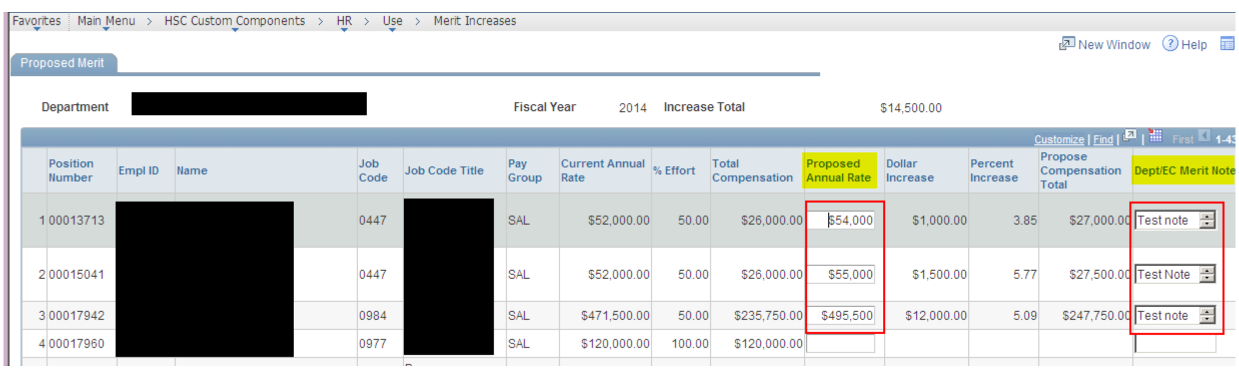
Proposed Merit

Department: [redacted] Fiscal Year: 2014 Increase Total:

	Position Number	Empl ID	Name	Job Code	Job Code Title	Pay Group	Current Annual Rate	% Effort	Total Compensation	Proposed Annual Rate	Dollar Increase	Percent Increase	Propose Compensation Total	Dept/EC Merit Note
1	00015867	[redacted]	[redacted]	0976	[redacted]	SAL	$130,000.00	90.00	$117,000.00					
2	00015872	[redacted]	[redacted]	0638	[redacted]	SAL	$90,380.00	100.00	$90,380.00					
3	00015881	[redacted]	[redacted]	0976	[redacted]	SAL	$130,487.00	90.00	$117,438.30					
4	00015882	[redacted]	[redacted]	0976	[redacted]	SAL	$128,068.00	90.00	$115,261.20					
5	00015883	[redacted]	[redacted]	0976	[redacted]	SAL	$162,180.00	25.00	$40,545.00					
6	00015885	[redacted]	[redacted]	0977	[redacted]	SAL	$74,693.00	100.00	$74,693.00					
7	00015911	[redacted]	[redacted]	0802	[redacted]	SAL	$54,655.00	100.00	$54,655.00					
8	00015912	[redacted]	[redacted]	9011	[redacted]	SAL	$46,800.00	100.00	$46,800.00					
9	00015914	[redacted]	[redacted]	9076	[redacted]	SAL	$38,000.00	100.00	$38,000.00					
10	00015917	[redacted]	[redacted]	9011	[redacted]	SAL	$48,425.00	100.00	$48,425.00					
11	00021180	[redacted]	[redacted]	9216	[redacted]	SAL	$39,714.00	100.00	$39,714.00					

The following fields will be calculated in HCM based on the amount entered in the Proposed Annual Rate field:

- Dollar Increase = ((Proposed Annual Rate - Current Annual Rate) * (% Effort/100))
- Percent Increase = ((Dollar Increase / Total Compensation) * 100)
- Proposed Compensation Total = (Proposed Annual Rate * (% Effort/100))

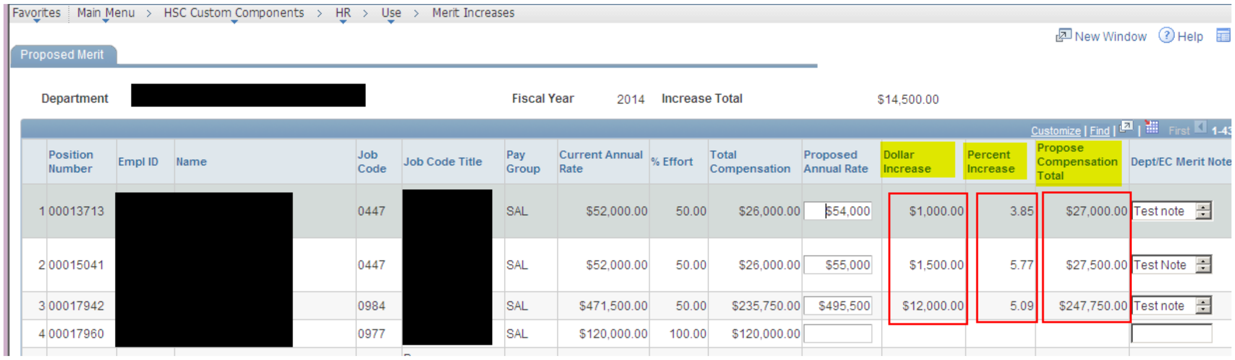


Favorites | Main Menu > HSC Custom Components > HR > Use > Merit Increases

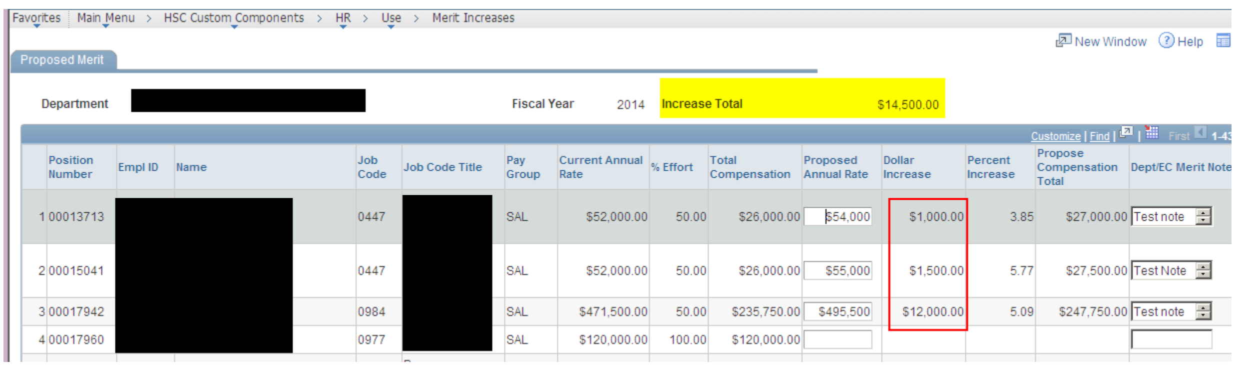
Proposed Merit

Department [redacted] Fiscal Year 2014 Increase Total $14,500.00

	Position Number	Empl ID	Name	Job Code	Job Code Title	Pay Group	Current Annual Rate	% Effort	Total Compensation	Proposed Annual Rate	Dollar Increase	Percent Increase	Propose Compensation Total	Dept/EC Merit Note
1	00013713	[redacted]	[redacted]	0447	[redacted]	SAL	$52,000.00	50.00	$26,000.00	$54,000	$1,000.00	3.85	$27,000.00	Test note
2	00015041	[redacted]	[redacted]	0447	[redacted]	SAL	$52,000.00	50.00	$26,000.00	$55,000	$1,500.00	5.77	$27,500.00	Test Note
3	00017942	[redacted]	[redacted]	0984	[redacted]	SAL	$471,500.00	50.00	$235,750.00	$495,500	$12,000.00	5.09	$247,750.00	Test note
4	00017960	[redacted]	[redacted]	0977	[redacted]	SAL	$120,000.00	100.00	$120,000.00					

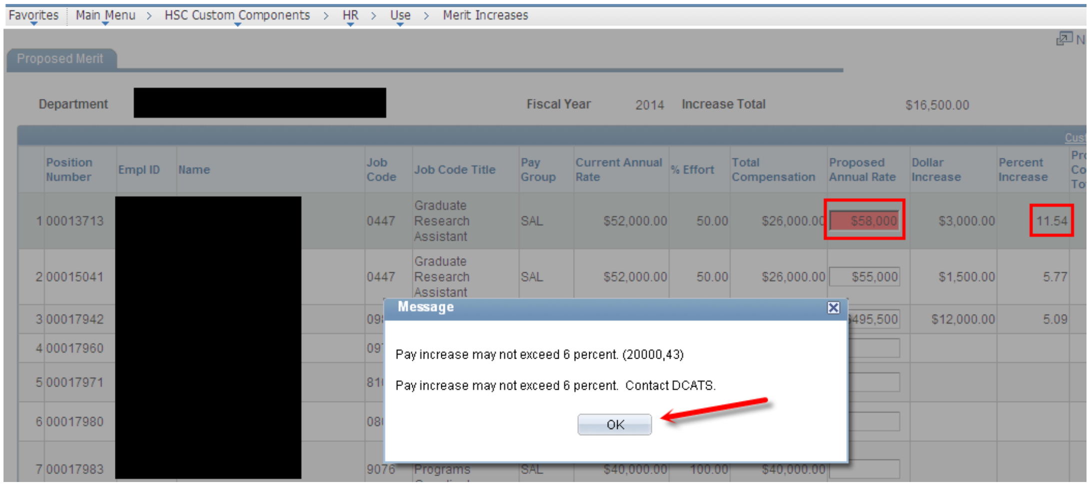


The Increase Total at the top of the page is the sum of the Dollar Increase amounts for that DEPTID.



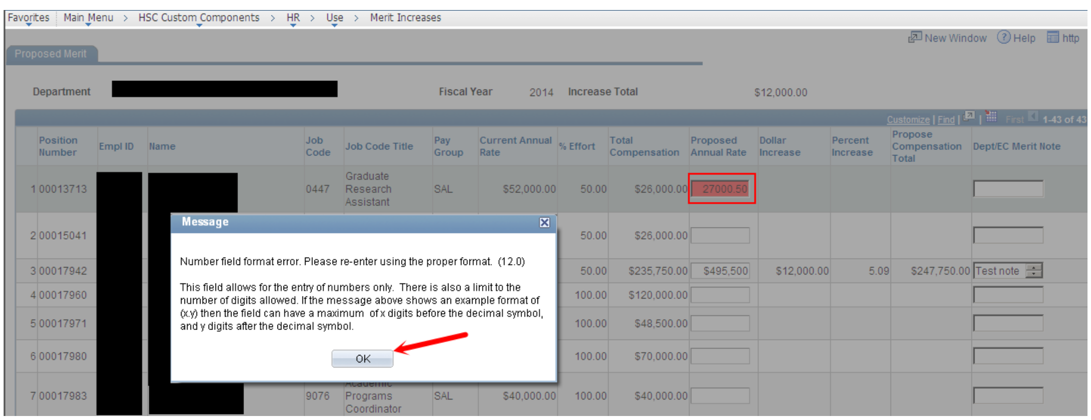
- If the proposed Annual Rate is greater than 6%, the following warning message will display. Click OK.

Note: The user will not be able to save the page if any of the Proposed annual Rates exceeds 6%. The user must adjust the Proposed Annual Rate to lower the Percent Increase to 6% or less.



- If the proposed Annual Rate is entered with decimal numbers, the following warning message will display. Click OK.

Note: The user will not be able to save the page if any of the Proposed Annual Rate amounts have decimal numbers. The user must enter whole dollar amounts.



- When you have completed entering the merits for a DEPTID, click Save

This completes the departmental portion of entering Merit Increases.

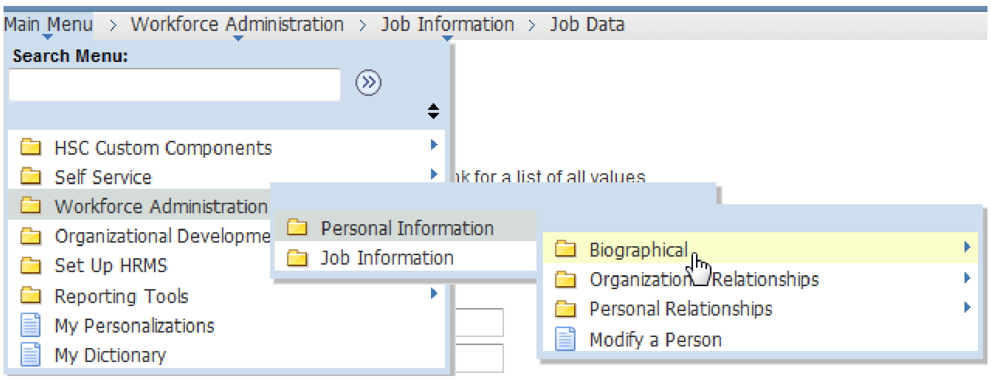
Chapter 6 – Employee Biographical Data

Employee Biographical Data process updates the **personal** data about an employee, such as campus directory name, home telephone, change of address, degrees earned, emergency contacts, etc.

Caution! ONLY HR is responsible for changing:

- Legal Name
- Marital Status
- Social Security Number
- Directory

Please do not attempt to make any of these changes in PeopleSoft!



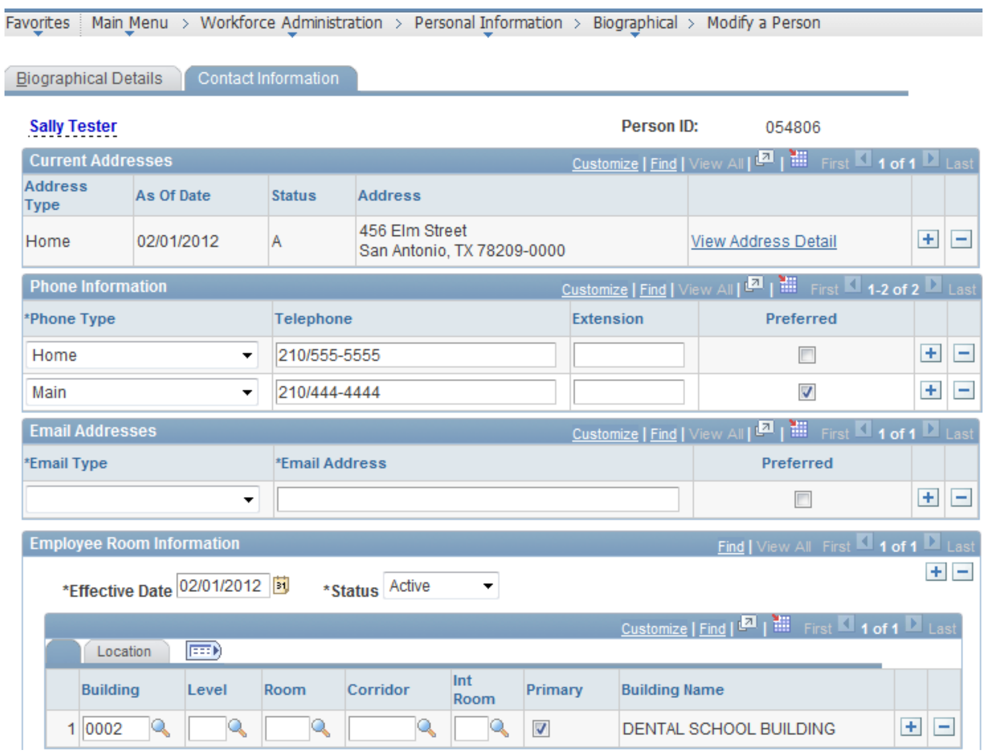
Name (Legal)/Address Panel: It is extremely important that the name appearing on the *Name/Address Panel* match the name appearing on the employee's social security card. **The department will not be able to make any changes to the employee's name. Human Resources will correct the name, if necessary.**

Address changes: Changes for an employee's address should be entered at the departmental level. Do not send address changes to the Human Resources Department or the Benefits Office. Make any necessary changes on the Name/Address panel via the Employee Biographical Data workflow in PeopleSoft. The individual may also enter address changes using the Employee Self Service link (ESS).

How does HR get the necessary information from the employee: When the employee begins work, on the first day of employment they must visit Human Resources and complete the I-9 Form. During this process, if the employee provides his/her social security card as one of the verification documents, the legal name is verified.

If the name the employee has been using differs from their legal name, Human Resources will update the name in PeopleSoft using the legal name. As a consequence, upon subsequently retrieving the employee's data, the department may notice that the employee's name has been changed. *The department will not be able to modify the name*.

Human Resources must complete any name changes such as those that result from marriage or divorce. The employee must visit Human Resources and bring the appropriate legal document that supports the name change (e.g. marriage certificate, divorce decree) along with an updated social security card or receipt from SSA with both the new name and SSN indicated on the receipt.



<u>**Current Addresses:**</u> To enter address changes, click on "View Address Detail", then Insert a row. Effective date will default to today's date. Be sure to follow postal regulations listed below:

For those employees who live in apartments, the apartment number should be put in the Address 1 field on the Name/Address panel, followed by the street address on Address 2. If there is no apartment number, enter the street address in the Address 1. This can also be done by the employee through Employee Self Service (ESS)

To enter an additional address, do not click on View Address Detail, click on the + sign all the way to the right. Select the type of address this is and enter information.

<u>**All**</u> NAME changes must be processed through the Office of Human Resources.

Phone Number Changes: To enter changes on the phone number, type over the old information. To add a phone type, highlight field, insert row and enter new information.

If the employee wishes to designate that his or her personal address and home phone number be public information, the "show personal data" box should be checked. If it is unchecked, personal data information will be suppressed in the phone directory.

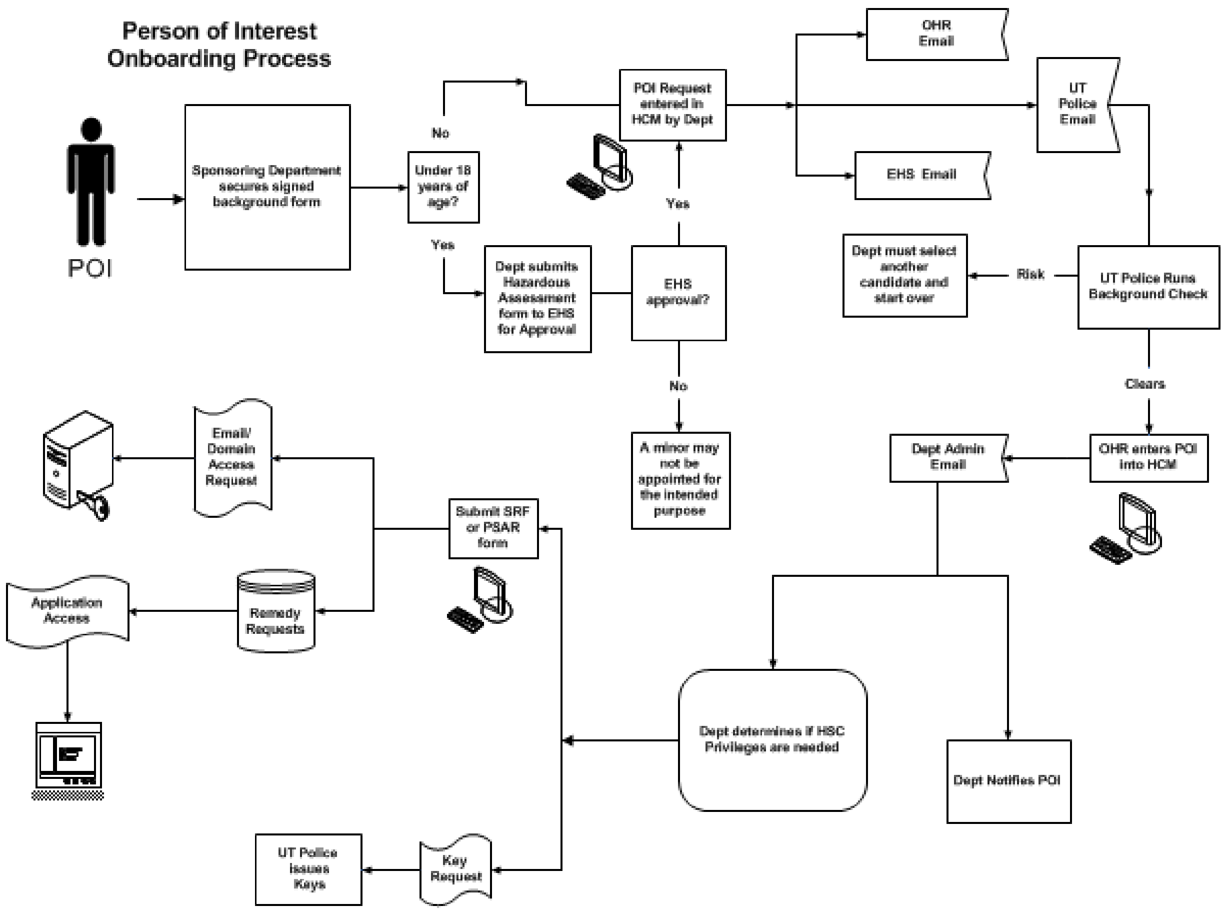
Remember to update this information for newly hired, rehired, transferred and promoted employees upon receipt of the automated email in the department's HRMS Inbox.

Employee Room Information: This information must be maintained and updated by the Departmental Administrator. Insert a new effective dated row with the correct building\ room information. This information is used by UT Police in emergency situations.

Some Faculty/Staff may have several listings of locations, one of these should be selected as the Primary location.

Education: To update the Education Level go to the Biographical Detail page, insert a new effective dated row and enter the Highest Education Level. As this status changes, please come and update this information.

Chapter 7 – Person Of Interest (POI)



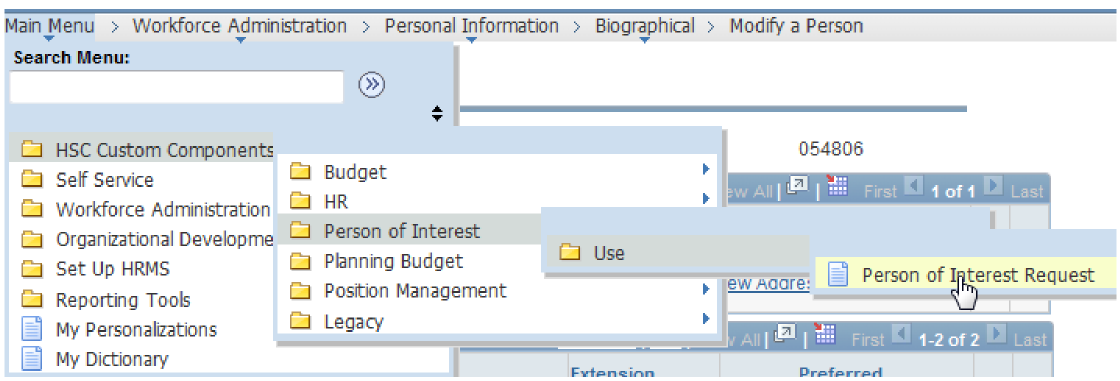
Example of Completing a POI Request Form

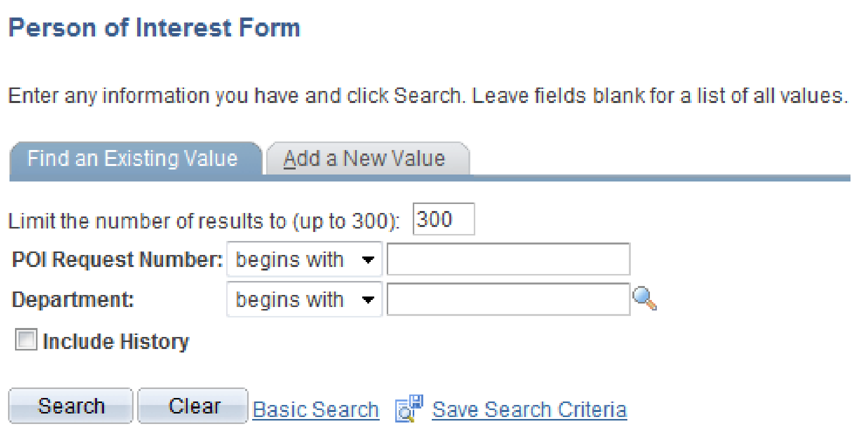
NOTE: A signed Criminal Background Check form must be submitted to OHR for retention prior to completing the POI Request Form.

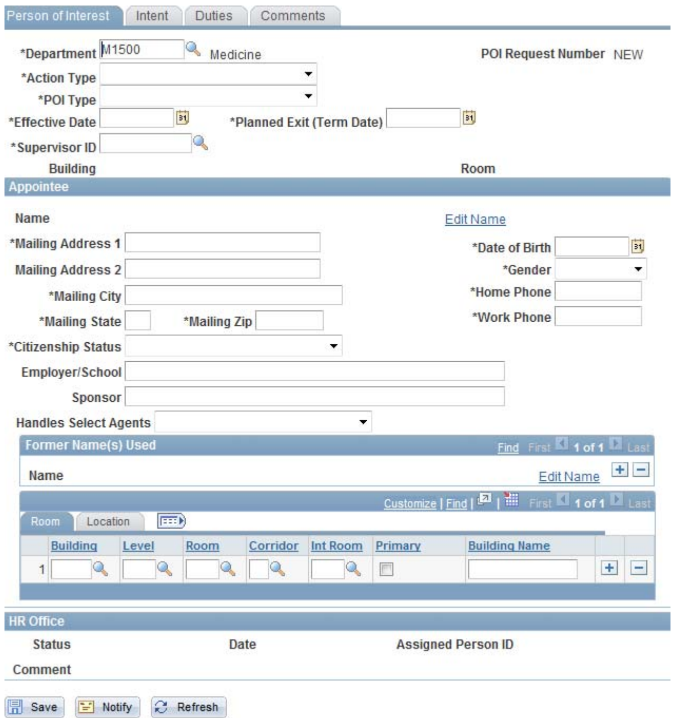
If the department elects to appoint a Person Of Interest, it is the department's responsibility to complete the Person Of Interest form and submit it to the Office of Human Resources. When the form has been processed, OHR will place the requested appointee into PeopleSoft HCM.

Use the following navigation path to access the Person of Interest Form:

HSC Custom Components>Person of Interest>Use>Person of Interest Request







- <u>Person of Interest Form</u>
  - Click on **Add a New Value** tab
  - POI Request number should be **NEW**
  - Click on **Add**
  - Change **Department ID** by selecting the magnifying glass
  - Enter in **Action: New Appointment**
  - Select **POI Type**
  - Enter in **Effective Date**
  - Enter **Planned Exit date** (HR will always assigned as 08/31 of the current fiscal year)
  - Enter **Supervisor ID** (If not known, click on magnifying glass)
  - Click on **Look Up** button
  - Select **Empl ID** of Supervisor
  - Under Appointee section Click on the **Edit Name**
  - Select **Prefix** (if applicable)
  - Enter **First Name**
  - Enter **Middle Name** (if applicable)
  - Enter **Last Name**
  - Select **suffix** (if applicable)
  - Click **Ok**
  - Enter **Mailing Address 1**
  - Select **Citizenship Status**
  - Enter **Employer/School**
  - Enter **Sponsor (if the Sponsor is a Temp Agency, enter the name here)**

  - Select **YES/NO** if person will handle Select Agents
  - Enter **Date of Birth**
  - Select **Gender**
  - Enter **Home phone**
  - Enter **Work phone**
  - Under Former Name section Click on **Edit Name** (if applicable)
  - Under Building use the magnifying glass to select **Building**
  - Under Level use the magnifying glass to select appropriate **Floor Level**
  - Under Room use the magnifying glass to select appropriate **Room number**
  - Under Corridor use the magnifying glass to select appropriate **Corrido**r
  - Under Int Room use the magnifying glass to select appropriate **Internal room** number
  - Click on **Primary** check box

If a POI will be at multiple locations, insert additional rows and repeat the necessary steps and appoint one location as the Primary

- Click on the **Intent Tab**
  - Intent: This is a **required field** where your department will provide a **detailed** explanation/reason for hiring POI. (Visit The "Helpful Hints" in HR Records website for instructions)
- Click on **Duties Tab**
  - Duties: This is a **required field** where you will type a **detailed** description of duties the POI will perform. (Visit The "Helpful Hints" in HR Records website for instructions)
- Click on the **Comments tab**
  - Comments: This is where you will enter any additional comments your department will want to be notated.

Double check all information on previous tabs before you Save. When the form has been submitted, it cannot be edited by the department.

  - Click on **Save**
  - **Notate your POI Request Number**

Workflow email will be generated to the following areas: OHR, UT Police and EHS once the POI Request form is submitted by the department.

OHR will enter POI in HCM, which will generate a workflow email to the department.

This completes the departmental portion of preparing a Person Of Interest form.

Example of Inactivating a POI

It is the department's responsibility to inactivate POIs when appointments have been completed. All POIs should be reviewed by the Departmental Administrator on a monthly basis.

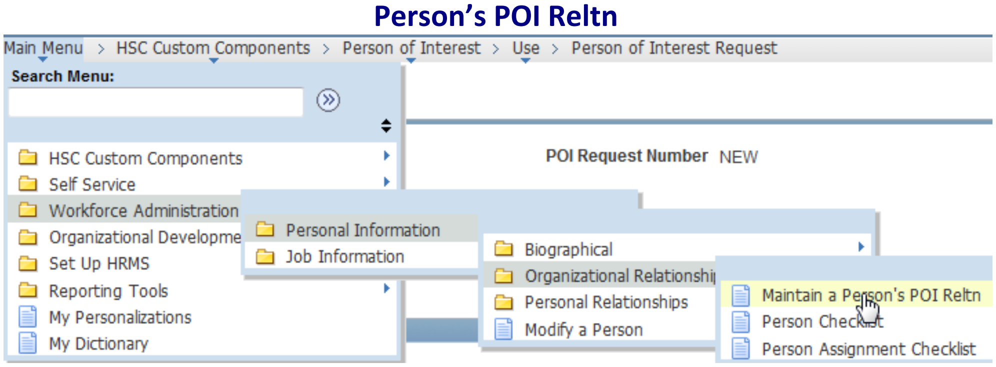
Note: POI's who have gone past their "Planned Exit Date" will not be automatically inactivated. It is the responsibility of the Departmental HCM User to expire these POI's.

If you elect to extend the time a POI is in your department, please send an email to the Office of Human Resources and include the following information:

- POI name
- POI id number
- Begin Date
- Original Planned Exit Date
- NEW Planned Exit Date
- Reason for extension

Use the following navigation path to access the Person of Interest Relationship:

Workforce administration>Personal Information>Organizational Relationships>Maintain a Person's POI Reltn

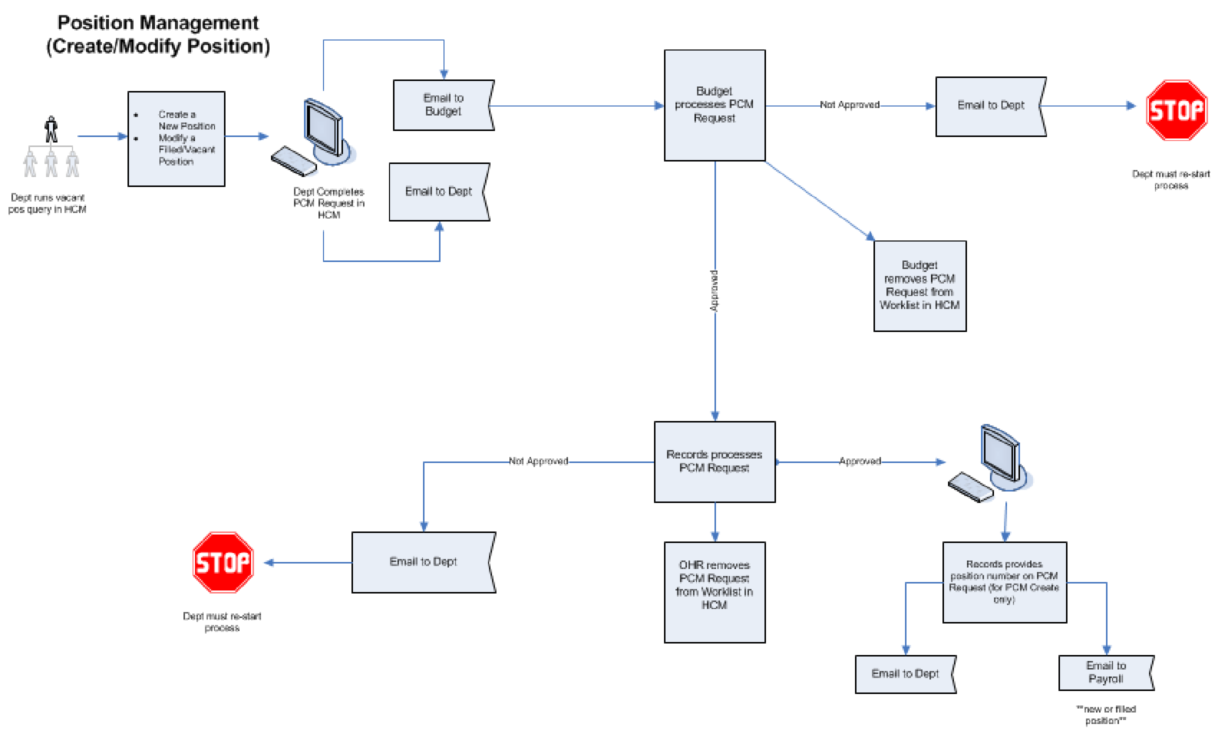


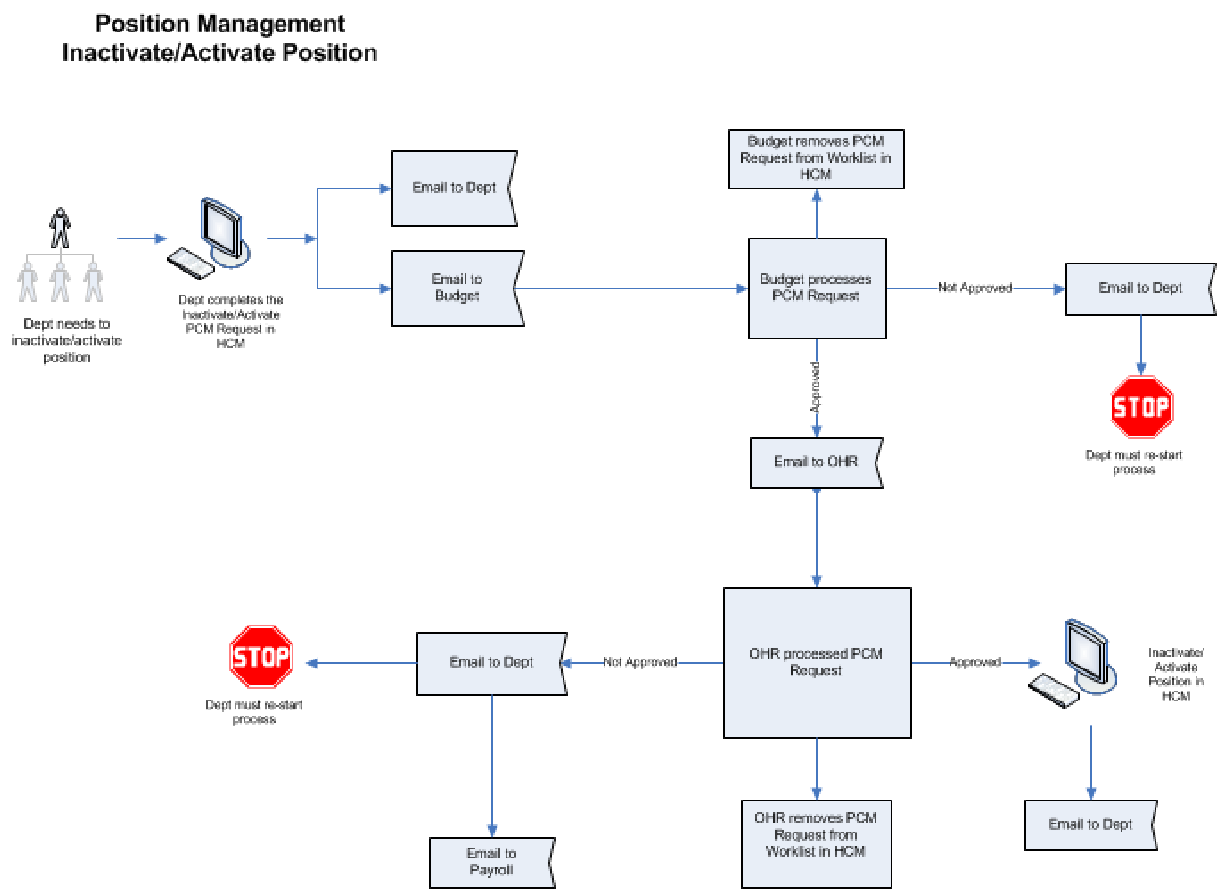
- Edit Person of Interest Relationship
  - Enter **Employee Id**
  - Click on **Search**
  - Click on the **add a row** icon
  - Effective date is last day worked plus one
  - In the Status field, use the magnifying glass to select "I" to inactivate
  - In the Planned Exit Date field, should stay blank
  - Click on **Save**

Workflow email will be generated to the following areas: Department, Bursars, UT Police, Library, Computing Resources, Office of Human Resources, and HCM security.

This completes the departmental Inactivation of a Person Of Interest.

Chapter 8 – Position Management



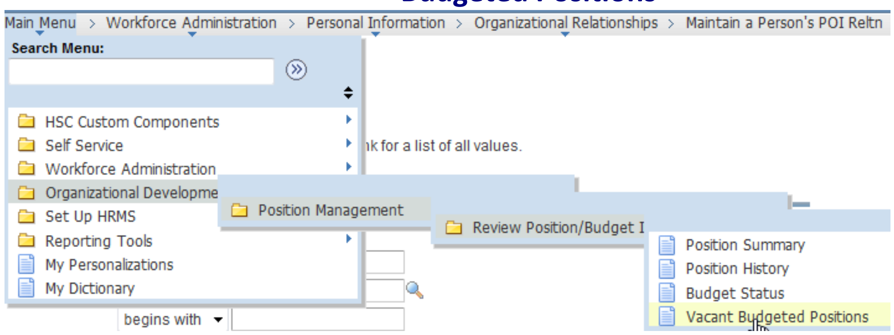

Position Management
Inactivate/Activate Position
Dept needs to inactivate/activate position
Dept completes the Inactivate/Activate PCM Request in HCM
Email to Dept
Email to Budget
Budget removes PCM Request from Worklist in HCM
Budget processes PCM Request
Not Approved
Email to Dept
STOP
Dept must re-start process
Approved
Email to OHR
OHR processed PCM Request
Not Approved
Email to Dept
STOP
Dept must re-start process
Email to Payroll
OHR removes PCM Request from Worklist in HCM
Approved
Inactivate/ Activate Position in HCM
Email to Dept

Example of Viewing Vacant Positions

You are the Administrator of a department and you would like to request a brand new position. Before you do so, you should view all of your vacant and inactive positions. If there is an inactive position you would like to use, submit the request to modify the position instead of creating one.

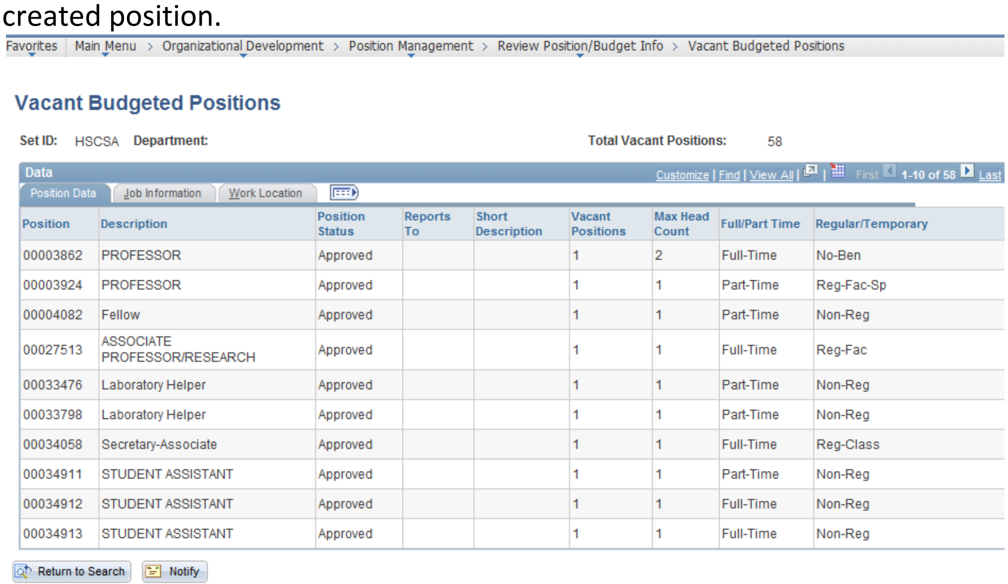
To view Vacant Positions in your department, follow the steps below:
Use the following navigation path to access the Vacant Position Report:

Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions



- <u>Vacant Budgeted Positions</u>
  - In Set ID type **HSCSA**
  - Department
  - Click on **Search**

You will now see a listing of all Budgeted Vacant positions for your department. You have the option of utilizing a current position and have it modified or continue to request a newly created position.



Favorites | Main Menu > Organizational Development > Position Management > Review Position/Budget Info > Vacant Budgeted Positions

Vacant Budgeted Positions

Set ID: HSCSA Department: Total Vacant Positions: 58

Data — Customize | Find | View All | First 1-10 of 58 Last

Position Data | Job Information | Work Location

Position	Description	Position Status	Reports To	Short Description	Vacant Positions	Max Head Count	Full/Part Time	Regular/Temporary
00003862	PROFESSOR	Approved			1	2	Full-Time	No-Ben
00003924	PROFESSOR	Approved			1	1	Part-Time	Reg-Fac-Sp
00004082	Fellow	Approved			1	1	Part-Time	Non-Reg
00027513	ASSOCIATE PROFESSOR/RESEARCH	Approved			1	1	Full-Time	Reg-Fac
00033476	Laboratory Helper	Approved			1	1	Part-Time	Non-Reg
00033798	Laboratory Helper	Approved			1	1	Part-Time	Non-Reg
00034058	Secretary-Associate	Approved			1	1	Full-Time	Reg-Class
00034911	STUDENT ASSISTANT	Approved			1	1	Part-Time	Non-Reg
00034912	STUDENT ASSISTANT	Approved			1	1	Full-Time	Non-Reg
00034913	STUDENT ASSISTANT	Approved			1	1	Full-Time	Non-Reg

Return to Search | Notify

Commonly Used Pay Group Codes

9MY
This pay group is used for employees who work 9 months but are paid on a 12 month pay cycle. This pay group code only determines an employee’s pay frequency. Benefits eligibility is addressed through written comments in a Position Create Modify (PCM) Request.

HRL
This pay group is used for employees who are paid by the hour, who work 50% or more, are employed for 4 ½ months or more and benefits eligible. This pay group determines an employee’s pay frequency and Benefits eligibility.

N24
This pay group is used for employees who are paid by the hour, who work 49%* or less, are employed for less than 4 ½ months and not benefits eligible. This pay group determines an employee’s pay frequency and Benefits eligibility.
*When the percent time exceeds 49%, the pay group is ultimately determined by the length of employment.

SAL
This pay group is used for employees who are paid once a month, who work 50% or more, are employed for 4 ½ months or more and benefits eligible. This pay group determines an employee’s pay frequency and Benefits eligibility.

N12
This pay group is used for employees who are paid once a month, who work 49%* or less, and are employed for less than 4 ½ months. This pay group determines an employee’s pay frequency and Benefits eligibility.
*When the percent time exceeds 49%, the pay group is ultimately determined by the length of employment.

RWH
This pay group is for Return to Work Retirees who are paid by the hour. This pay group code only determines a Return to Work Retiree’s pay frequency and prevents active payroll deductions. Benefits eligibility is addressed through written comments in a Position Create Modify (PCM) Request.

RWS
This pay group is for Return to Work Retirees who are paid by the hour. This pay group code only determines a Return to Work Retiree’s pay frequency and prevents active payroll deductions. Benefits eligibility is addressed through written comments in a Position Create Modify (PCM) Request.

STP
This pay group is for employees who are paid on a Stipend, not benefits eligible, identified as having a record number 10 in HCM and monitored through Payroll Services.

WOS
This pay group is for individuals who are not employees, do not have a pay frequency, and do not record a percent time recorded. This is a non-benefits eligible pay group code.

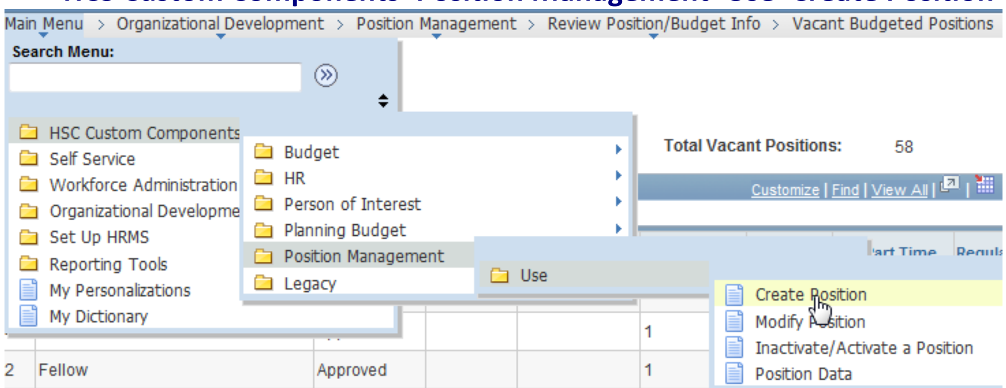
Example of Creating a Position

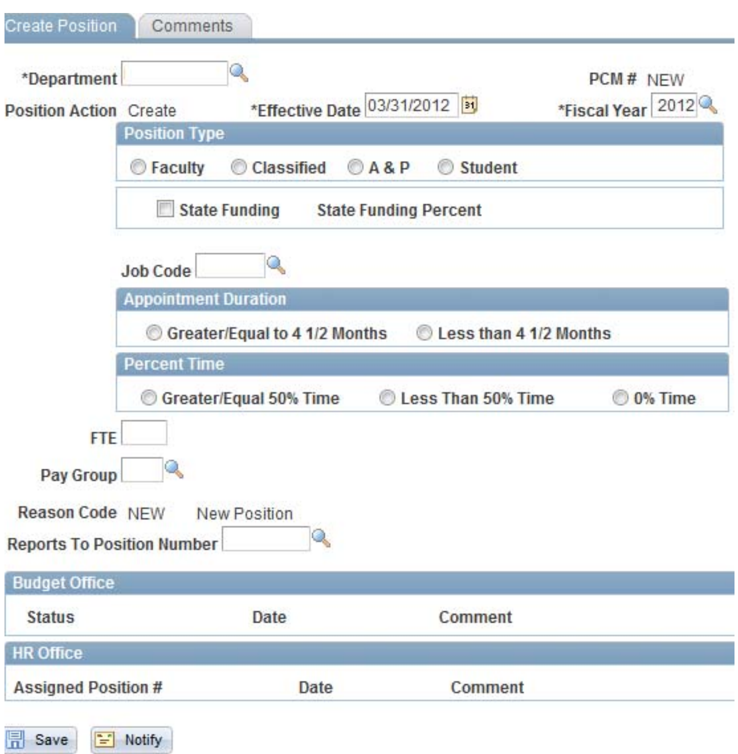
When it is determined your department needs to create a new position, proceed with the below steps to Create a Position.

Faculty: The FAF must be reviewed and verified by the VPAA's office before a PCM request can be submitted. A PCM request submitted before the FAF is reviewed and verified by the VPAA's office will result in a denial of your PCM request.

Use the following navigation path to access the Request to Create a Position:

HCS Custom Components>Position Management>Use>Create Position





- <u>Create Position</u>
    - Click the **Add a New Value** tab
    - Verify Fiscal year
    - Verify PCM is set to **NEW**
    - Click on **Add**
    - Verify Dept id is correct by selecting magnifying glass
    - Enter the **effective date**
    - Verify Fiscal Year
    - Select **Position Type**

If the position is being funded in any way by State Funds Check the box for State Funding and enter the % amount of State funding.

- Click in the **Job Code Field** (if unknown click on magnifying glass for a list of job codes and corresponding titles)
- Click the radio button to select **Appointment Duration**
- Click the radio button to select the **Percent Time**
- Enter Total **FTE** amount
- Click in the **Pay Group Field** (Visit the "Helpful Hints" section of the HR Records website for instructions. An incorrect pay group code requested will result in a denial of your PCM request)
- Click Reports To **Position Number** -- If not known, click on magnifying glass.
- Click on the hyperlink for the **appropriate person**
- Click on the **Comments Tab** (intended incumbent must be provided for Faculty positions or your PCM request will result in a denial).
- Type additional **comments** as needed
- Click on the **Save** button

When the department submits the form, the system will provide it a PCM #.

<u>Workflow email will be generated to the following areas: Department and Budget Office who will then route it to OHR.</u>

This completes the departmental portion of a creating a position.

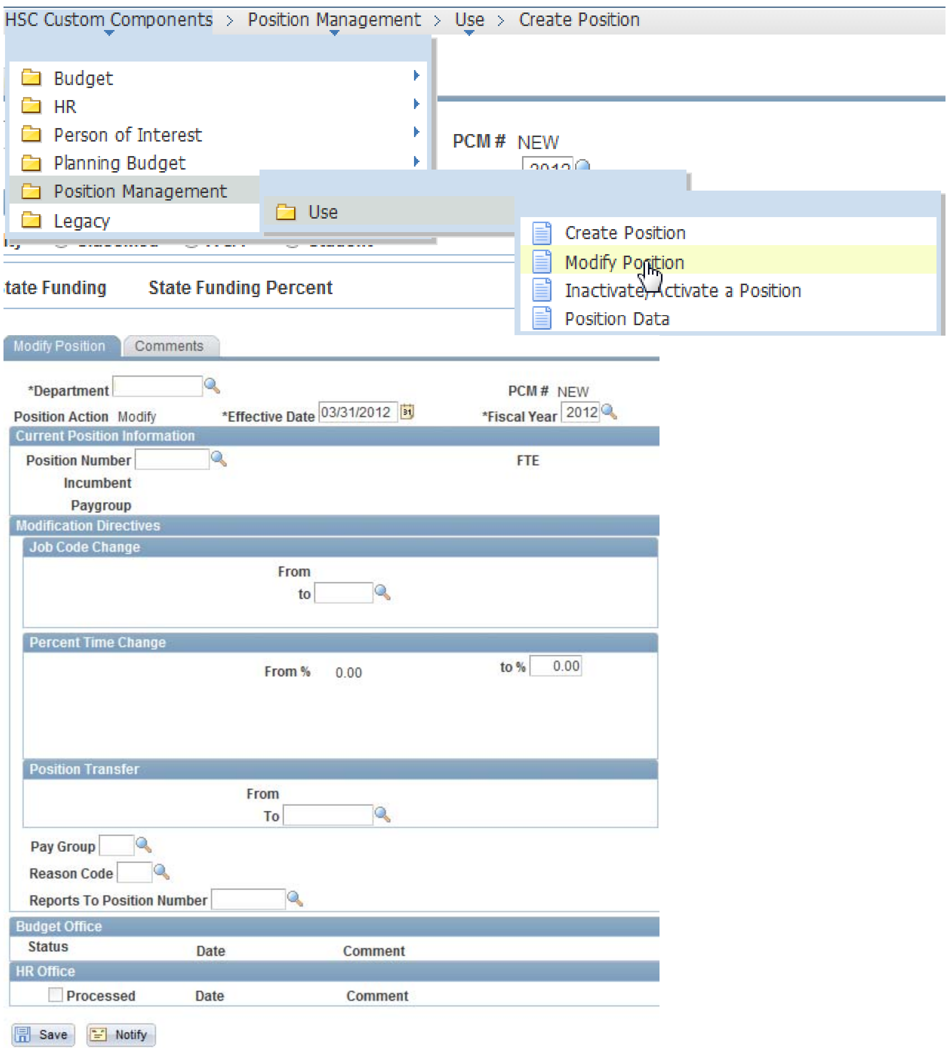
Example of Modifying a Vacant or Filled Position

When it is determined your department does not want to create a new position, proceed with the steps below to modify a current position in your department. When modifying a position you must complete every field on the form or it cannot be submitted.

Faculty: The FAF must be reviewed and verified by the VPAA's office before a PCM request can be submitted. A PCM request submitted before the FAF is reviewed and verified by the VPAA's office will result in a denial of your PCM request.

Use the following navigation path to access the Request to Modify a Position:

HSC Custom Components>Position Management>Use>Modify Position



- Modify Position
  - Click the **Add a New Value** tab
  - Verify Fiscal year
  - Verify PCM is set to NEW
  - Click on **Add**
  - Verify Dept id by selecting magnifying glass
  - Enter the **effective date**
  - Verify Fiscal Year is correct
  - Enter the position number
  - Enter **job code** (press tab to populate information)
  - Enter in **Percent Time Change** and press **Tab**

Anytime a percent time change is entered, the system will automatically open a Combo Code (funding source) window. Percentage cannot exceed 100% total.

  - Enter Combo code
  - Enter **100 %** in the Percent Time Change combo codes box.
  - Enter **Department Id.**
  - Enter the **Pay Group** (Visit the "Helpful Hints" section of the HR Records website for instructions. An incorrect pay group code requested will result in a denial of your PCM request)
  - Enter the **Reason**
  - Enter **Reports to Position Number –** If not known, click on magnifying glass.
  - Select the Comments tab at the top of the page
  - Enter any comments that are necessary
  - Click on **Save**

When the department submits the form, the system will issue a PCM Request Number.

Workflow email will be generated to the following areas: Department and Budget Office who will then route it to OHR.

This completes the departmental portion of Modifying a Vacant or Filled Position

Example of Inactivate/Activate a Position

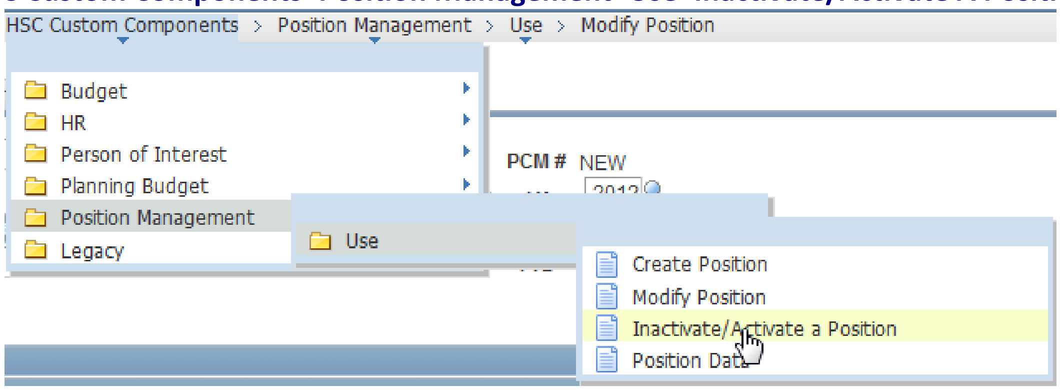
When it is determined your department must inactivate a position, proceed with the steps below. A position cannot be inactivated if it is currently occupied.

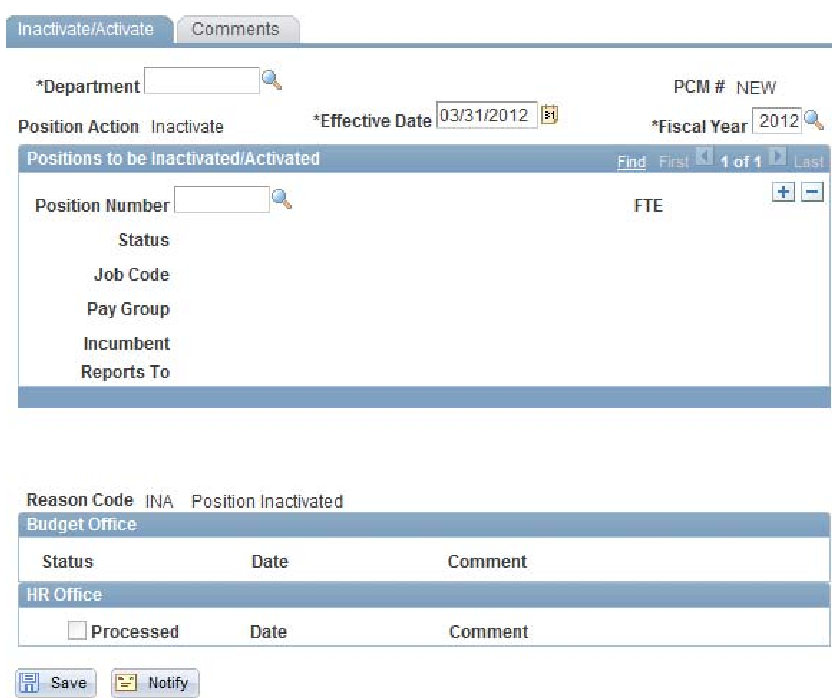
Note: *Before completing a PCM form to inactivate a position, the department must first zero out the dollars on the position. It is not necessary to zero out the percent on the position.*

You will not be able to activate and inactivate positions on the same request. Additionally, if you need to modify an Inactive position, you must first submit a PCM request to activate an inactive position before modifying the position in a separate PCM request.

Use the following navigation path to access the Request to Inactivate/Activate a Position:

HSC Custom Components>Position Management>Use>Inactivate/Activate A Position





Inactivate/Activate

- Click the **Add a New Value** tab
- Verify Fiscal Year
- Verify PCM is set to NEW
- Click on **Add**
- Verify Dept id by selecting magnifying glass
- Enter the **effective date**
- Verify the Fiscal Year is current
- Enter the position number
- View the Position Action to verify status
  - If you are inactivating a position it will read **Inactivate**; if you are activating a position it will read **Activate**.
  - Verify the status (the position should not be filled)
- Click on the Add a Row icon if processing multiple positions and follow appropriate steps
- Select the **Comments page (**additional comments should go in the comments section)
- Click on **Save**

When the department submits the form, the system will issue a PCM Request number.

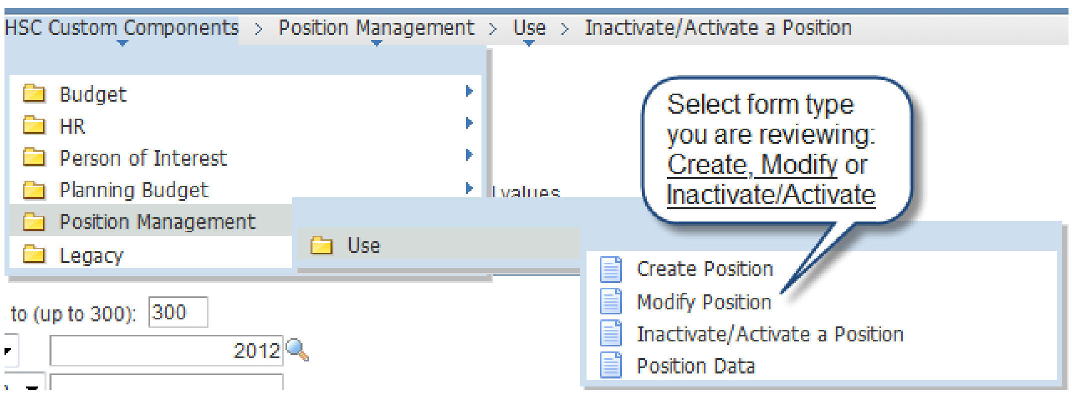
Workflow email will be generated to the following areas: Department and Budget Office who will then route it to OHR.

This completes the departmental portion of inactivating/activating a position.

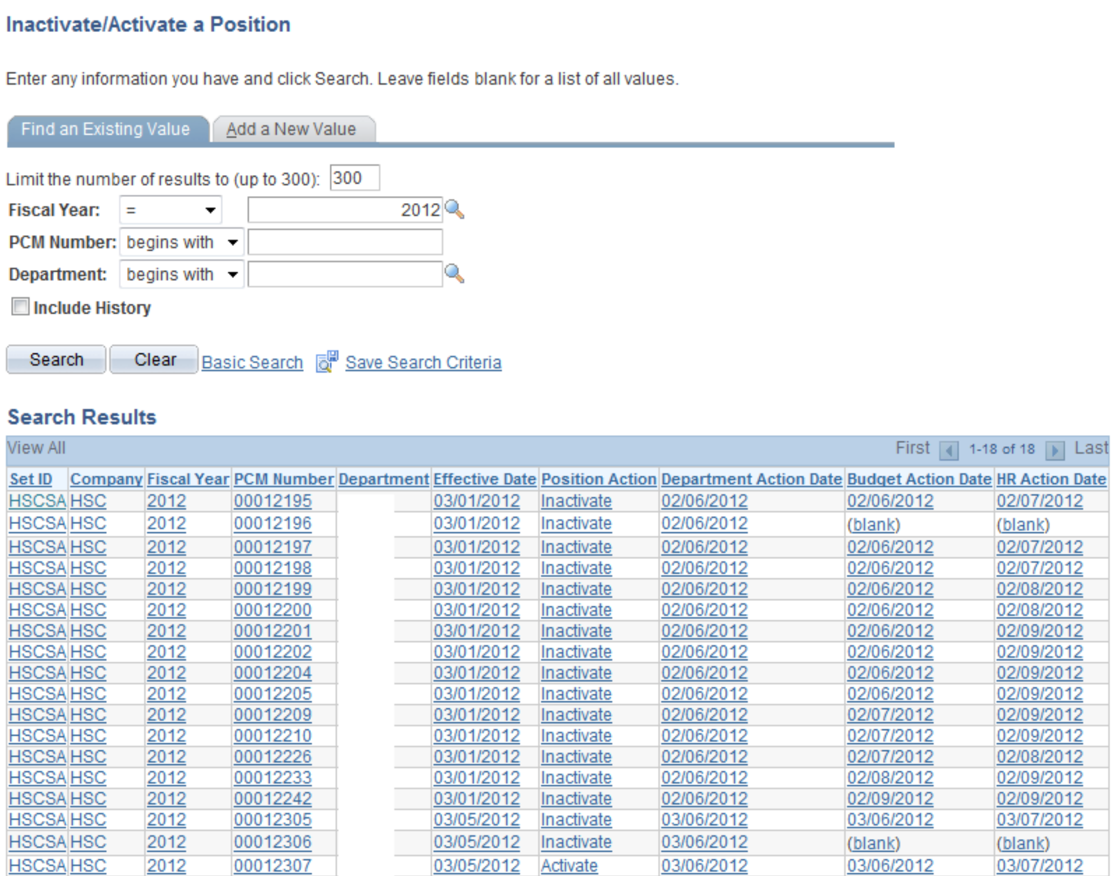
Chapter 9 – Tracking a PCM

Use the following navigation path to track the status of your PCM form.

HSC Custom Components>Position Management>Use



- Select the type of form you would like to review
  - Create / Modify / Inactivate/Activate
- Verify fiscal year
- Click search



Inactivate/Activate a Position

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

Find an Existing Value | Add a New Value

Limit the number of results to (up to 300): 300
Fiscal Year: = 2012
PCM Number: begins with
Department: begins with
Include History

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-18 of 18 Last

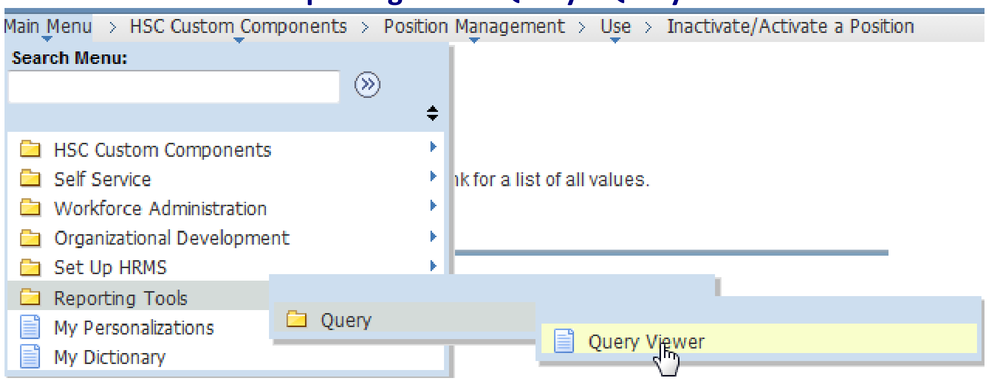
Set ID	Company	Fiscal Year	PCM Number	Department	Effective Date	Position Action	Department Action Date	Budget Action Date	HR Action Date
HSCSA	HSC	2012	00012195		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/07/2012
HSCSA	HSC	2012	00012196		03/01/2012	Inactivate	02/06/2012	(blank)	(blank)
HSCSA	HSC	2012	00012197		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/07/2012
HSCSA	HSC	2012	00012198		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/07/2012
HSCSA	HSC	2012	00012199		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/08/2012
HSCSA	HSC	2012	00012200		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/08/2012
HSCSA	HSC	2012	00012201		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/09/2012
HSCSA	HSC	2012	00012202		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/09/2012
HSCSA	HSC	2012	00012204		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/09/2012
HSCSA	HSC	2012	00012205		03/01/2012	Inactivate	02/06/2012	02/06/2012	02/09/2012
HSCSA	HSC	2012	00012209		03/01/2012	Inactivate	02/06/2012	02/07/2012	02/09/2012
HSCSA	HSC	2012	00012210		03/01/2012	Inactivate	02/06/2012	02/07/2012	02/09/2012
HSCSA	HSC	2012	00012226		03/01/2012	Inactivate	02/06/2012	02/07/2012	02/08/2012
HSCSA	HSC	2012	00012233		03/01/2012	Inactivate	02/06/2012	02/08/2012	02/09/2012
HSCSA	HSC	2012	00012242		03/01/2012	Inactivate	02/06/2012	02/09/2012	02/09/2012
HSCSA	HSC	2012	00012305		03/05/2012	Inactivate	03/06/2012	03/06/2012	03/07/2012
HSCSA	HSC	2012	00012306		03/05/2012	Inactivate	03/06/2012	(blank)	(blank)
HSCSA	HSC	2012	00012307		03/05/2012	Activate	03/06/2012	03/06/2012	03/07/2012

Chapter 10 – Running a Query

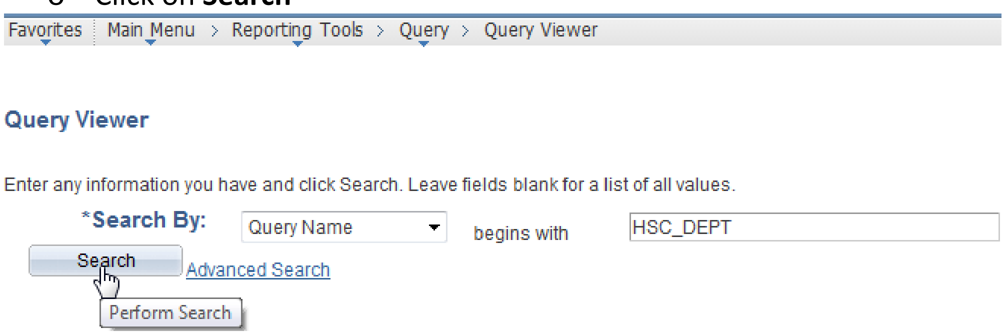
To run a selected query you will need to start with the following steps:

Use the following navigation path to access the Benefits Summary:

Reporting Tools>Query> Query Viewer



- In the Search By field leave the defaulted selection, Query Name.
  - Type in HSC_DEPT
  - Click on **Search**



You will be provided with the listing of Queries that are available for you to run. Select a query from the listing provided.

- Click on either **Excel or HTML** to view your query results
- Depending on the query you select, you may be asked to provide your **Dept ID,** the **Fiscal year** or **Effective date.**

Search Results

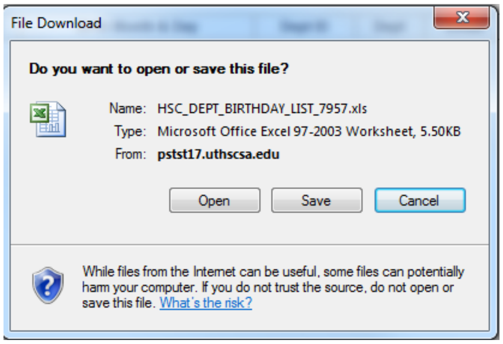
Folder View: -- All Folders --

Query — Customize | Find | View 30 | First 1-41 of 41 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
HSC_DEPT_BIRTHDAY_LIST	Birthday List by Department	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_CURRENT	Bud Rpt Curr Row-Pos Own wk tl	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_CURRENT_BY_EC	Current Row-Pos Own by EC	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_CURRENT_RAHC	Bud Rpt w/ Current Row-Pos Own	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_FUTURE	Bud Rpt Futr Row-Pos Own WkTl	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_FUTURE_EC	Bud Rpt w/ Future Row-Pos Own	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_FUTURE_TN	Bud Rpt w/ Future Row-Pos Own	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUDGET_RPT_MED_DEAN	Budget Report for Med Dean	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_CAT_SUMMARY	Plan Bud Totals by Pos Owner	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_CAT_SUM_FD_OWN_EC	Plan Bud Tots by Fund Owner_EC	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_CAT_SUM_FUND_OWN	Plan Bud Totals by Fund Owner	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_EC_SUMMARY	Prior Yr Sum of Target/Actuals	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_EC_TARGETS_BY_DPT	Prior Yr Distributed Targets	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_EC_TARGET_TOTAL	Grand Total for Prior FY	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_INACTIVE_POSITION	Inactive Positions by Dept	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_PLANNING_RPT	Plan Bud Rpt by Pos Owner	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_PLAN_RPT_FUND_OWN	Plan Bud Rpt by Fund Owner	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_PLAN_RPT_PROG_PRJ	Plan Bud Rpt by Fund Owner	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_PLAN_RPT_USER	PlanBud Rpt Pos Own with User	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_RPTFUND_OWNCURREN	Bud Rp Currnt Row-Fnd Own WkTl	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_RPTFUND_OWNFUTURE	Bud Rpt Fut Row-FndOwn wrktl	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_BUD_TARGET	Prior Year Department Targets	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_EE_JOB_AND_FUNDING	Job Data	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_EMP_VISA	Visa info for EMP by Dept	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_HCM_VACANT_POS_ALL_FY	VACANT POSITIONS FOR ALL FY	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_INFO_MED_DEAN	List of Med Dean Pers info	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_JJ_POS_VACANT_GT_1_YR	Vacant Positions > 1 Year	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_LEAVE_ACCRUAL	Leave Accural reporting	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_LEAVE_BY_EMPLID		Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_LOCATION_INFO	List of personnel Locations	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_PERFORMANCE_REVIEW	Performance Review query	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_PERSONNEL_INFO	List of personnel information	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_POI_QUERY	POIs by Department	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_POI_VISA	Visa Info for POI's by Dept	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_POI_WITH_EMPLOYER	POIs by Department	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_PROPOSED_MERITS	Proposed Merits	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_QUERY	Dept NH RH and Terminations	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_REPORTS_TO	Reports to value filled pos	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_SEC_GROUP	List Operators	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_SEC_GROUP_ROLES	List Oper: Front Office Roles	Public		HTML	Excel	XML	Schedule	Favorite
HSC_DEPT_TENURE_INFO	Departmental Tenure informatio	Public		HTML	Excel	XML	Schedule	Favorite

- After entering the required criteria, click on **View Results**

If you run your query using Excel, you have the ability to either Open or Save your query. By clicking on open you will be able to view your requested query within an excel spreadsheet. Clicking on save will allow you to save the query to your desktop or any other designated location.



Example of a Budget Query:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Budget Report Qry	11										
2	DeptID	Job Code	Job Descr	ID	Name	Position	Funding Owner	Combo Code	% Effort	Budget	Total Compensation	Eff Date
3	TR01	0201	Professor	80000000101	Ross Geller	70000101	B5412	105713-14001-FAC	100.00	160000.000	160000.00	9/1/2006
4	TR01	0201	Professor	80000000101	Ross Geller	70000101	N1000	104378-48001-AUG	0.00	25000.000	0.00	9/1/2006
5	TR01	0201	Professor	VACANT	VACANT POSITION	70000105	M1900	109023-22100-FAC	0.00	0.000	0.00	9/1/2006
6	TR01	0301	Assistant Professor	80000000101	Ross Geller	70000109	M1000	108963-22100-FAC	0.00	0.000	0.00	9/1/2006
7	TR01	0301	Assistant Professor	80000000103	Chandler Bing	70000108	G1500	109094-22100-FAC	100.00	100000.000	100000.00	9/1/2006
8	TR01	0451	Postdoctoral Fellow	80000000104	Joey Tribbiani	70000104	D1000	109104-22200-WAGES	50.00	80000.000	40000.00	9/1/2006
9	TR01	0731	Librarian V	80000000105	Phoebe Buffay	70000102	M1000	108963-22100-A&P	100.00	50000.000	50000.00	9/1/2006
10	TR01	0804	Asst To The Vp	80000000102	Monica Geller-Bing	70000107	R1000	119591-14001-A&P	100.00	80000.000	80000.00	9/1/2006
11	TR01	9011	Office Manager	VACANT	VACANT POSITION	70000110	A1000	106195-14001-FAC	80.00	35000.000	28000.00	9/1/2006
12	TR01	9020	Adm Asst I	VACANT	VACANT POSITION	70000103	B5200	105710-14001-CLASS	100.00	25000.000	25000.00	9/1/2006
13	TR01	9040	Adm Secr	80000000106	Rachel Green	70000106	B5400	113680-14001-CLASS	100.00	30000.000	30000.00	9/1/2006

Example of the Birthday List Query:

	A	B	C	D	E	F	G	H
1	Birthday List by Department	30						
2	ID	Name	First Name	Last	Birth Month & Day	Dept ID	Dept	Email
3	022449	Travieso,Teresa C	Teresa	Travieso		T6700	Info Mgt Client Support Svcs	TRAVIESOT2@UTHSCSA.EDU
4	045729	Castillo Jr.,Rogelio S	Rogelio	Castillo Jr.		T6700	Info Mgt Client Support Svcs	CASTILLORS@UTHSCSA.EDU
5	046261	Sandoval,Lydia	Lydia	Sandoval		T6700	Info Mgt Client Support Svcs	SANDOVALL@UTHSCSA.EDU
6								
7								

When you run your query, the columns default to an extended format. To reduce the size of your columns, click on the top between two columns and you see a plus sign. Double clicking on this area will collapse your columns.

A1 Birthday List by Department

	A	B	C	D	E	F	G	H
1	Birthday List b	1						
2	ID	Name	First Name	Last	Birth Month & Day	Dept ID	Dept	Email
3	054802	Tester,Hester	Hester	Tester	Jan 01	TEST	TEST	TESTER@UTHSCSA.EDU
4								

Repeat the above process for any of listed queries you may want to run.

This concludes running queries.