

# PeopleSoft 8.9

## Workforce Administration for Quasi Agencies

June 26, 2007



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## Introduction

### Effective Dating

The **Effective Date** indicates when an action or event is in effect or valid. Each employee record is effective dated. PeopleSoft is designed to automatically perform certain functions based on the Effective Date. Effective Dating provides a mechanism for determining if a transaction is current, history, or future.

Some pages will display the word **Current, History, or Future** so you can always tell what type of transaction you are viewing. Every action taken on an employee will have an effective date. Because we have been in production for multiple fiscal years there may be more than one record associated with an employee. Future dated actions may be in the system but PeopleSoft does not act on that information until the actual day of the effective date.

**Current:** Closest to but not exceeding today's date.

**Future:** Greater than today's date.

**History:** Prior to current date effective date.

**Note: It is very important to use the correct date for new hires, rehires, and terminations as these dates impact benefits and compensation.**

### Multiple Actions

It is necessary to use **Effective Sequencing** when more than one action occurs on the same **Effective Date**.

### **Examples:**

1. When an employee's position is reclassified, the first entry (**sequence 0**) is inserted to indicate the **Job Reclassification Position Change** with a reason of **Job Reclassification (Action Reason [JRC])**.

A row is then inserted, using the same effective date with **Effective Sequence 1** to update the Job Information with the appropriate **Personnel Change (Action/Reason, Job Code, Salary, etc.)**

2. When an employee moves from an **Intermittent/Temporary Position** to a **Regular Position**, the first entry (**sequence 0**) is made to update the Job Information with the appropriate **Personnel Change (Action/Reason, Job Code, Salary, etc)**. A row is then inserted, using the same effective date with **Effective Sequence 1**, to indicate a **Data Change** from **Intermittent/Temporary** to **Regular (Action Data Change, Action Reason [ITR])**.

### Position Data Override

The position Data Override feature located on the **Work Location** panel may be used when the employee information differs from the defaulted **Position** information.

This is a **toggle button**. The default is to **Override Position Data**. When you click it, the button will change to activate **Use Position Data**.

The following fields on the Job Information panel may be changed as necessary:

**Job Code; Full/Part; Standard Hours; FTE**

**Do not toggle of Override Position Data if no data is actually being overridden. None of the fields on the work location panel may be changed.**

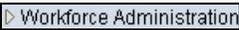
After entering the override data, you must save the record with the **Use Position Data** button still displayed. This indicates that employee job information differs from the information on the position record. This information is needed for reporting purposes.

Important: Never turn on the Position Data Override feature if none of the job information is different.

## Hires, Rehires, Transfers, Promotions, and Demotions

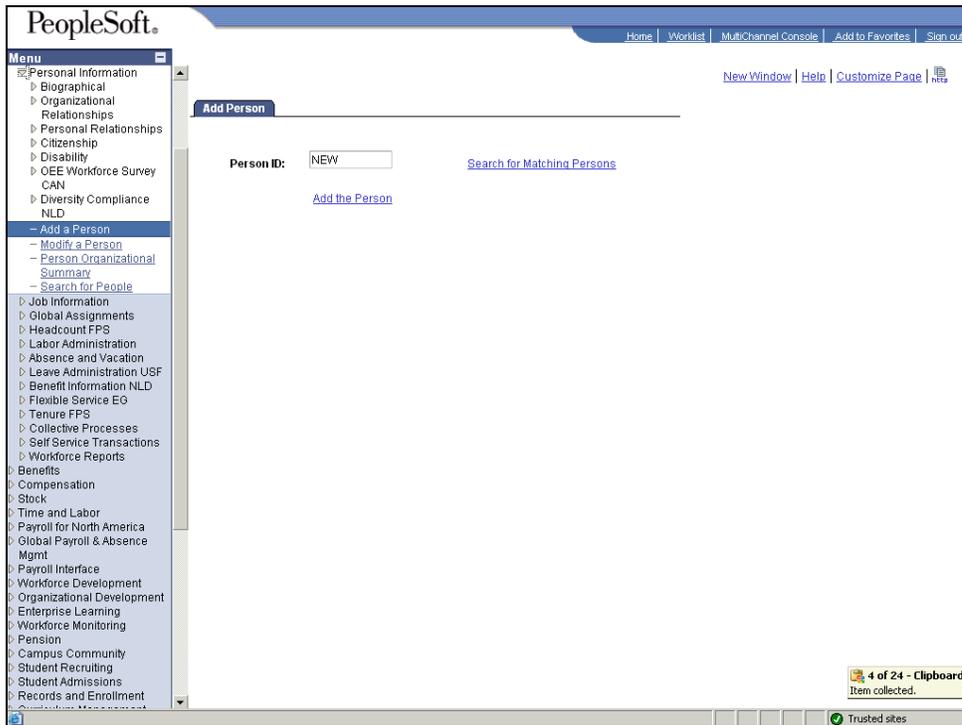
### Hire a New Employee

#### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 



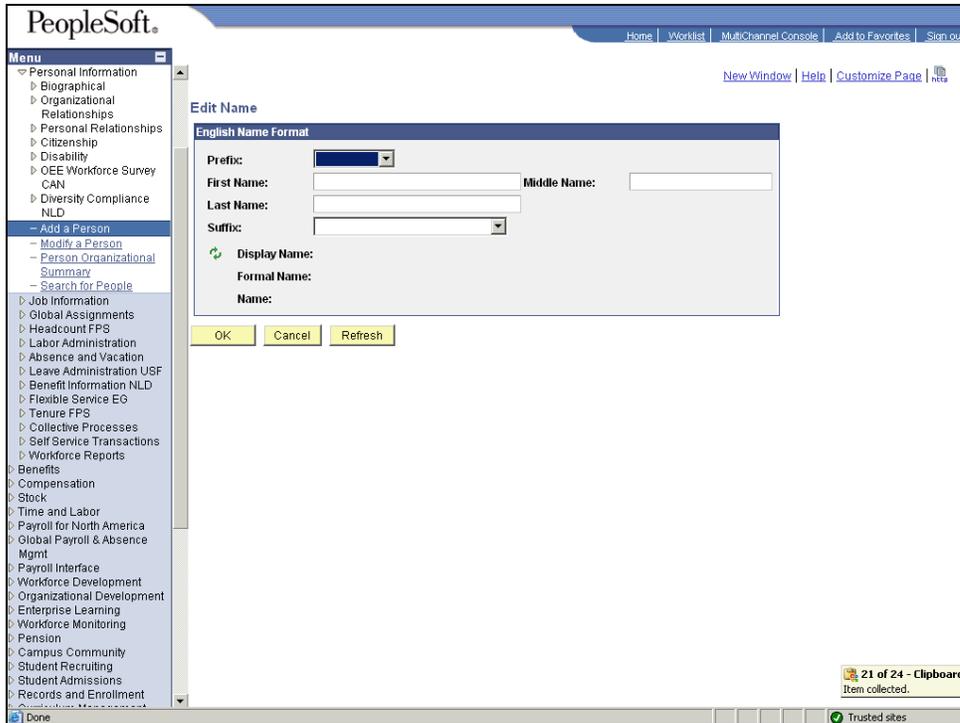
Step	Action
2.	Click the <b>Add a Person</b> button. 



Step	Action
3.	Click the <b>Add the Person</b> link. <a href="#">Add the Person</a>

The screenshot shows the PeopleSoft interface for adding a new person. The 'Biographical Details' tab is active. The 'Effective Date' field is populated with 06/13/2007. The 'Language Code' dropdown menu is open, showing 'English' selected. The 'Add Name' link is highlighted in blue. The 'National ID' section shows a table with columns for Country, National ID Type, National ID, and Primary ID. The table contains one row with Country USA, National ID Type Social Security Number, and Primary ID checked.

Step	Action
4.	Enter the effective date of hire into the <b>*Effective Date</b> field.
5.	If the format type does not default, select <b>English</b> from the list. 
6.	Click the <b>Add Name</b> link. 

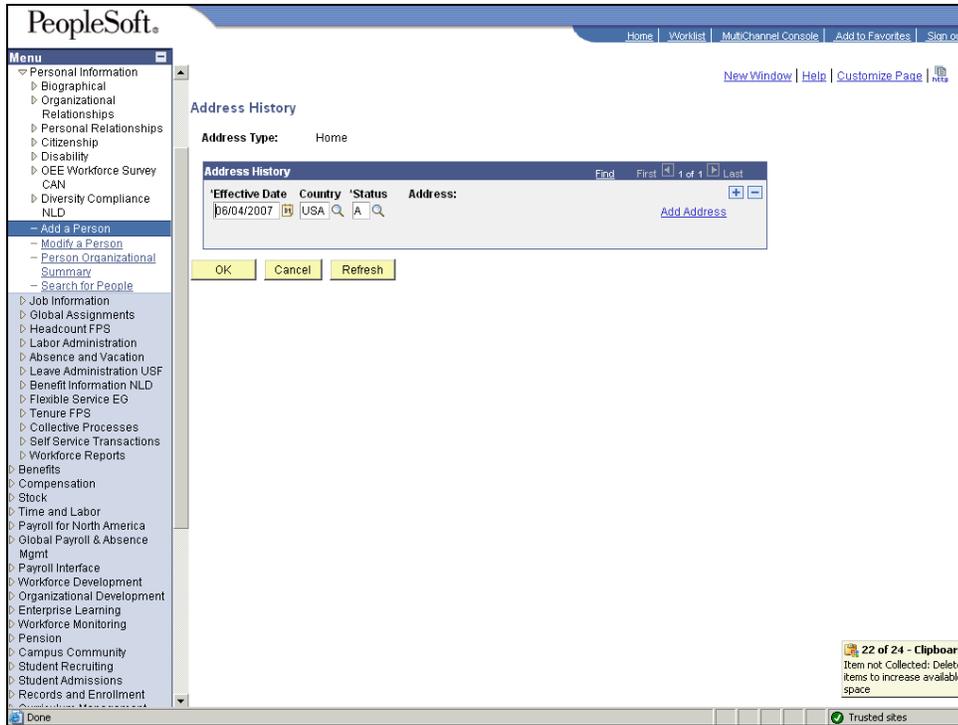


Step	Action
7.	Enter the employee's first name into the <b>First Name</b> field.
8.	Enter the middle name or initial into the <b>Middle Name</b> field.
9.	Enter the employee's last name into the <b>Last Name</b> field.
10.	Click the <b>Suffix</b> list. 
11.	Select <b>Jr</b> from the list. 
12.	Click the <b>OK</b> button. 

The screenshot shows the PeopleSoft 'Person ID: NEW' form. The 'Biographical Details' tab is active. The 'Primary Name' section has 'Effective Date' set to 06/04/07 and 'Format Type' set to English. The 'Biographic Information' section has 'Date of Birth' set to 0 Years 0 Months, 'Birth Country' set to USA, and 'Birth State' and 'Birth Location' are empty. The 'Biographical History' section has 'Effective Date' set to 06/13/2007, 'Gender' set to Unknown, 'Highest Education Level' set to A-Not Indicated, 'Marital Status' set to Single, and 'Language Code' set to English. The 'National ID' section has 'Country' set to USA and 'National ID Type' set to Social Security Number. The 'Save' button is highlighted.

Step	Action
13.	Enter the employee's date of birth into the <b>Date of Birth</b> field..
14.	Enter the effective date of hire into the <b>*Effective Date</b> field for Biographical Information. .
15.	Select the employee's <b>gender</b> from the list of values. <input type="text" value="Male"/>
16.	Select the employee's <b>highest education level</b> from the list of values. <input type="text" value="D-Some College"/>
17.	Select the employee's <b>Marital Status</b> from the list. <input type="text" value="Married"/>
18.	Enter the employee's social security number into the <b>National ID</b> field.
19.	Click the <b>Contact Information</b> tab. <input type="text" value="Contact Information"/>

Step	Action
20.	Click the <b>Edit/View Address Detail</b> link. <a href="#">Add Address Detail</a>



Step	Action
21.	Click the <b>Add Address</b> link. <a href="#">Add Address</a>



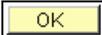
To view a list of address abbreviations go to:  
<http://www.usps.com/ncsc/lookups/abbreviations.html#states>

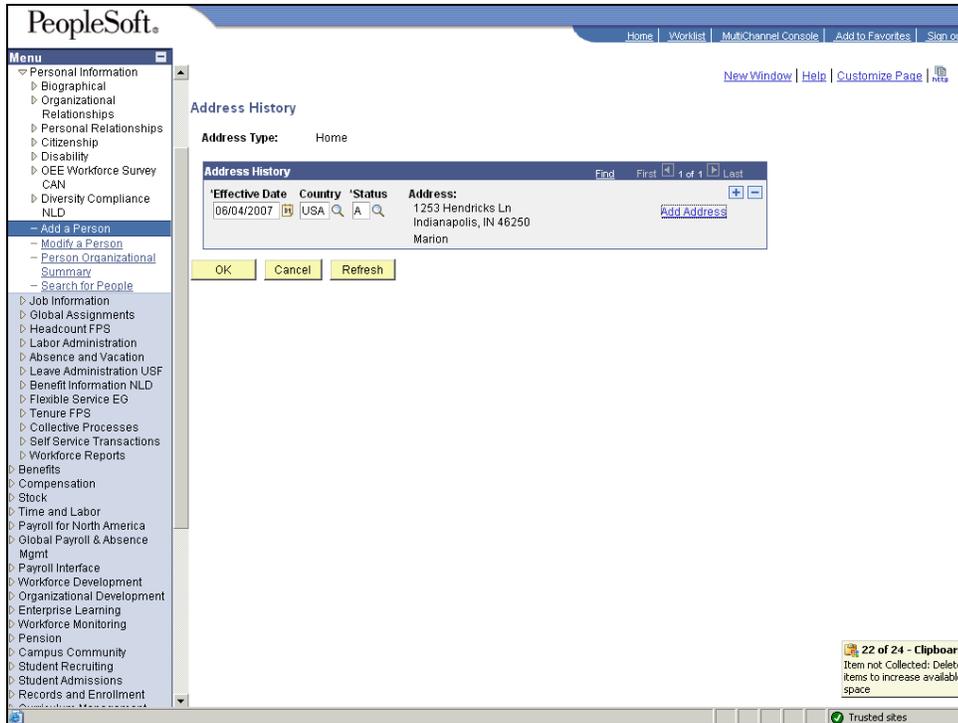
The screenshot shows the 'Edit Address' form in the PeopleSoft application. The form is titled 'Edit Address' and is located in the 'Person' organizational summary page. The form contains the following fields:

- Country: United States
- Address 1: [Text Field]
- Address 2: [Text Field]
- Address 3: [Text Field]
- City: [Text Field]
- State: [Text Field]
- Postal: [Text Field]
- County: [Text Field]

At the bottom of the form, there are 'OK' and 'Cancel' buttons. A 'Clipboard' notification is visible in the bottom right corner, indicating that an item was not collected and suggesting to delete items to increase available space.

Step	Action
22.	Enter the employee's address into the <b>Address 1</b> field.
23.	Enter the employee's city into the <b>City</b> field.
24.	Enter the employee's state into the <b>State</b> field.
25.	Enter the employee's zip code into the <b>Postal</b> field.
26.	Enter the county of residence into the <b>County</b> field.
27.	Click the <b>OK</b> button.



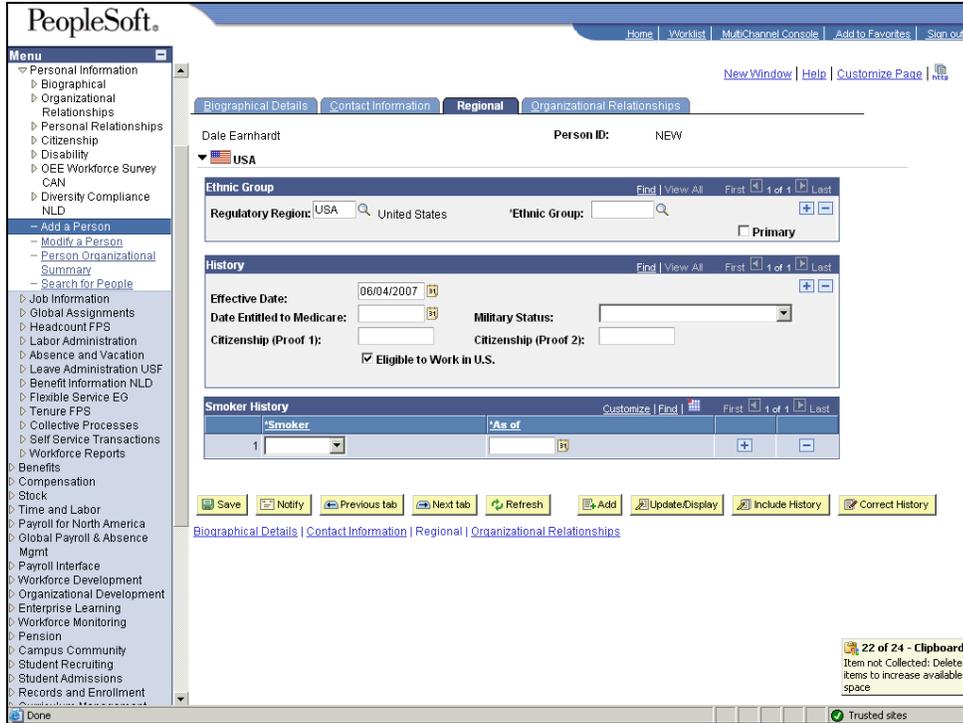


Step	Action
28.	Click the <b>OK</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">OK</div>

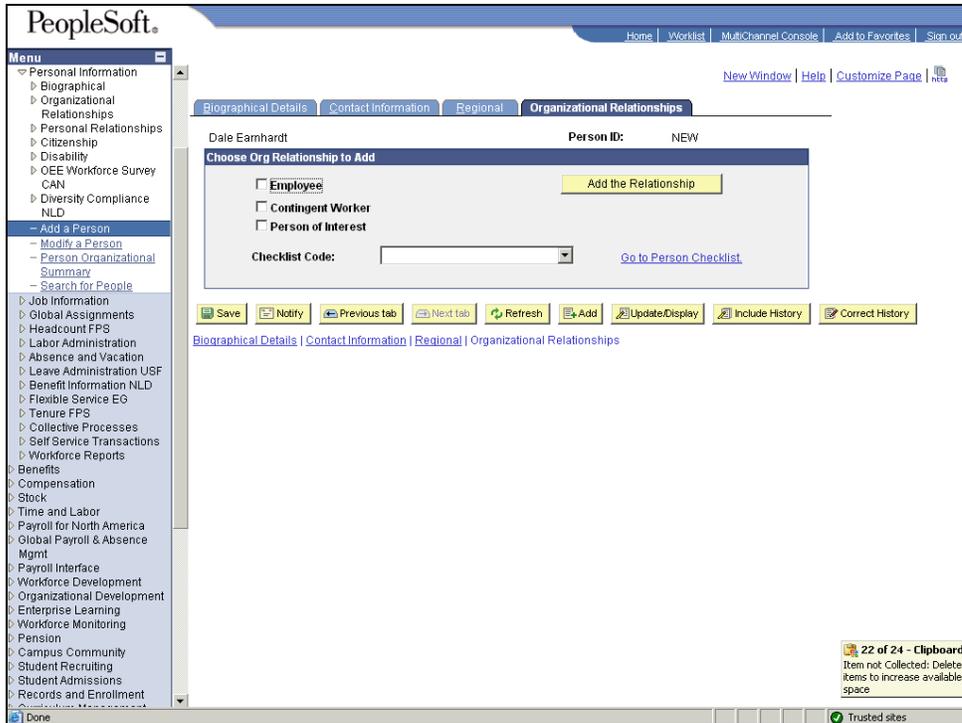
Step	Action
29.	Click the appropriate phone type from the list. <input type="text" value="Home"/>
30.	Enter the employee's telephone number into the <b>Telephone</b> field.
31.	Select the email type from the list. <input type="text" value="Business"/>
32.	Enter the employee's email address into the <b>*Email Address</b> field.

 State Personnel will be utilizing home and business email addresses to contact employees in the future regarding important events (i.e., Open Enrollment). Please be sure to collect an email address from as many employees as possible.

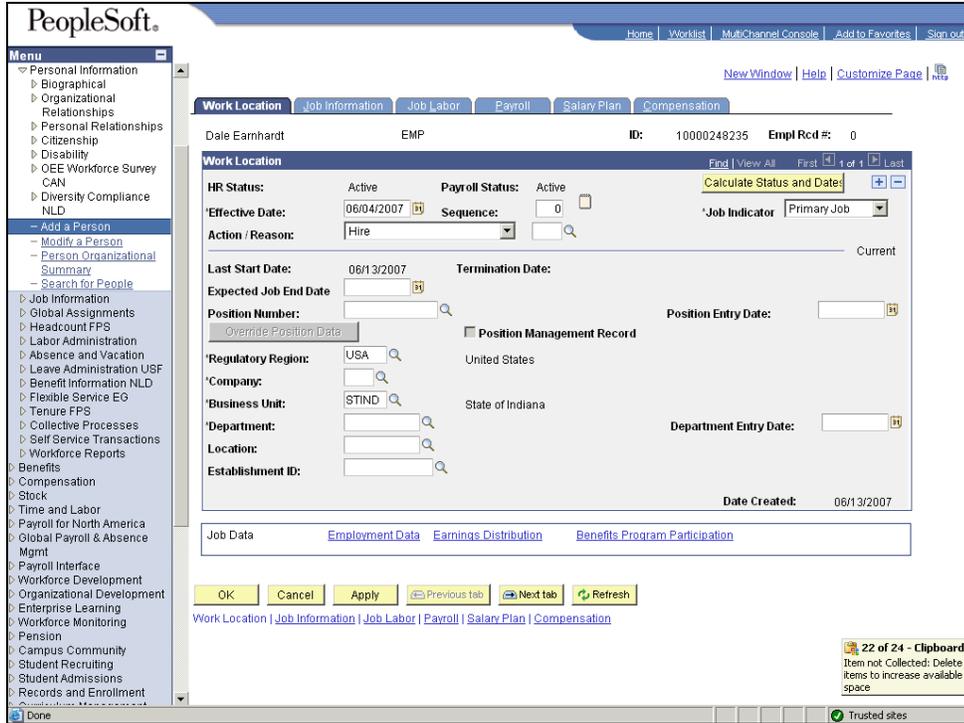
Step	Action
33.	Click the <b>Regional</b> tab. <input type="text" value="Regional"/>



Step	Action
34.	Click the <b>Look up Ethnic Group (Alt+5)</b> button. 
35.	Select the appropriate value from the list.
36.	Click the <b>Organizational Relationships</b> tab. 



Step	Action
37.	Click the <b>Employee</b> option. <input type="checkbox"/> <b>Employee</b>
38.	Click the <b>Add the Relationship</b> button. <input type="button" value="Add the Relationship"/>

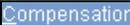


Step	Action
39.	Enter the appropriate reason code into the reason field.
40.	Enter the PCN into the <b>Position Number</b> field.
41.	Press <b>[Tab]</b> .
42.	Click the <b>Job Information</b> tab. 
43.	Select the appropriate <b>Empl Class</b> from the list. 
44.	Click the <b>Job Labor</b> tab. 

The screenshot shows the PeopleSoft interface for Dale Earnhardt (EMP ID: 10000248235). The 'Job Labor' tab is active, and the 'Union Seniority Date' field is highlighted in blue. The 'Payroll' tab is also highlighted in blue. The interface includes a menu on the left, a top navigation bar, and various data entry fields and tables.

Step	Action
45.	Enter the effective date of hire into the <b>Union Seniority Date</b> field.
46.	Click the <b>Payroll</b> tab. 

The screenshot shows the PeopleSoft interface for Dale Earnhardt (EMP ID: 10000248235). The 'Payroll' tab is active, and the 'Payroll for North America' section is expanded. The 'Pay Group' field is currently empty, which is the focus of step 47. Other fields include 'Employee Type' (set to 'Excep Hrlly'), 'Tax Location Code' (999), and 'Holiday Schedule' (Not Tipped). The 'Effective Date' is 06/04/2007 and the 'Action / Reason' is 'Hire'.

Step	Action
47.	Verify the pay group defaulted correctly. If necessary, enter the pay group into the <b>Pay Group</b> field.
48.	Click the <b>Compensation</b> tab. 

PeopleSoft

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Dale Earnhardt EMP ID: 10000248235 Empl Rcd #: 0

Compensation Find | View All First 1 of 1 Last

Effective Date: 06/04/2007 Effective Sequence: 0 Job Indicator: Primary Job  
Action / Reason: Hire Replace Incumbent Current

Compensation Rate: 848.00 USD Frequency: B Biweekly

Comparative Information

Pay Rates

Pay Components Customize | Find First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NABWLY	0	848.000000	USD	B	

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply Previous tab Next tab Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

22 of 24 - Clipboard  
Item not Collected; Delete items to increase available space

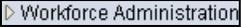
Trusted sites

Step	Action
49.	<p>Enter the bi-weekly compensation rate. When finished, click the <b>Calculate Compensation</b> button.</p> <p>If applicable, click employment data and enter the probation date.</p> <p><b>Calculate Compensation</b></p>
50.	<p>Click the <b>Benefits Program Participation</b> link.</p> <p><b>Benefits Program Participation</b></p>

The screenshot shows the PeopleSoft interface for 'Benefits Program Participation'. The 'Benefit Status' section is active, showing an effective date of 06/04/2007 and a status of 'Active'. The 'Benefits Administration Eligibility' section contains a grid of nine eligibility fields (Elig Fld 1-9). At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'.

Step	Action
51.	Enter the BAS Group ID into the <b>BAS Group ID</b> field.
52.	Click the <b>OK</b> button. 
53.	<b>End of Procedure.</b>

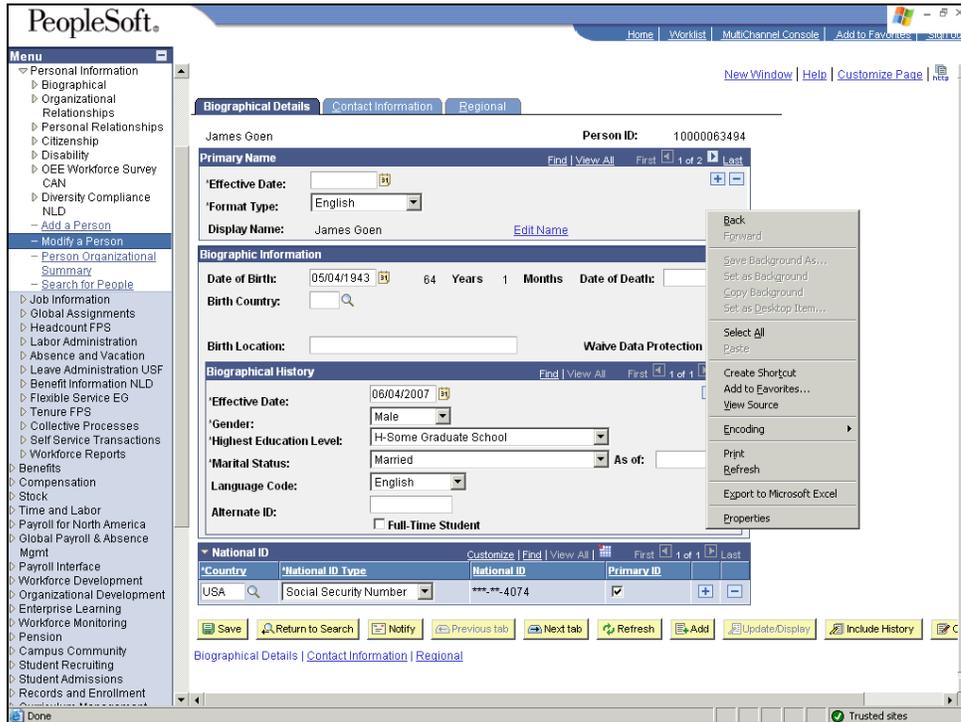
## Entering a Rehire Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Modify a Person</b> button. 
3.	Enter the employee id number into the <b>Personal Information</b> field.

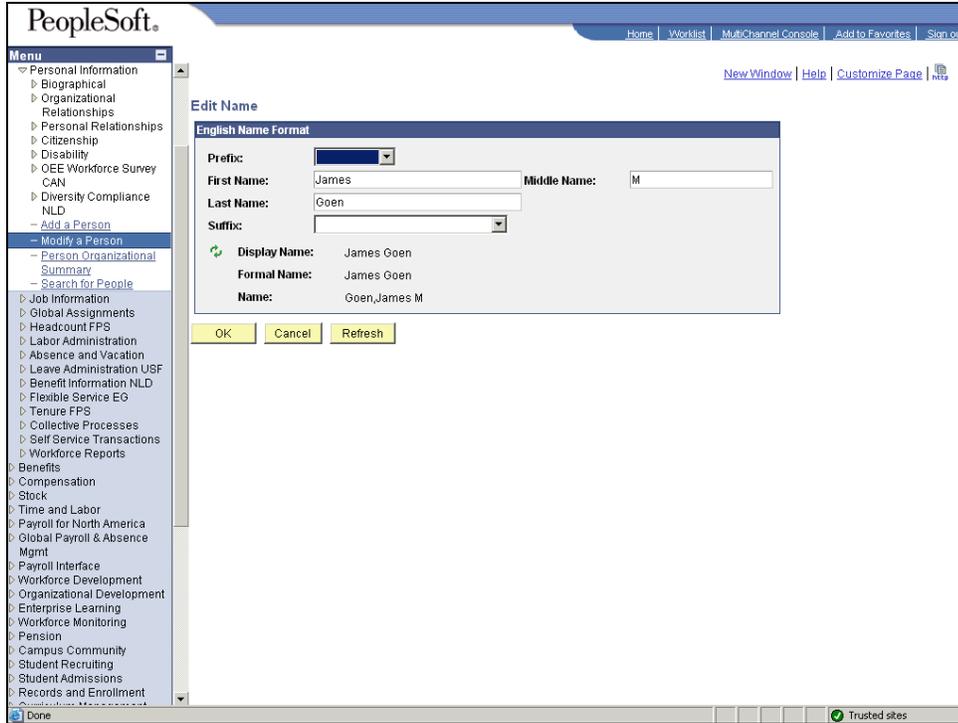
# Training Guide

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Step	Action
4.	Click the <b>Search</b> button. 

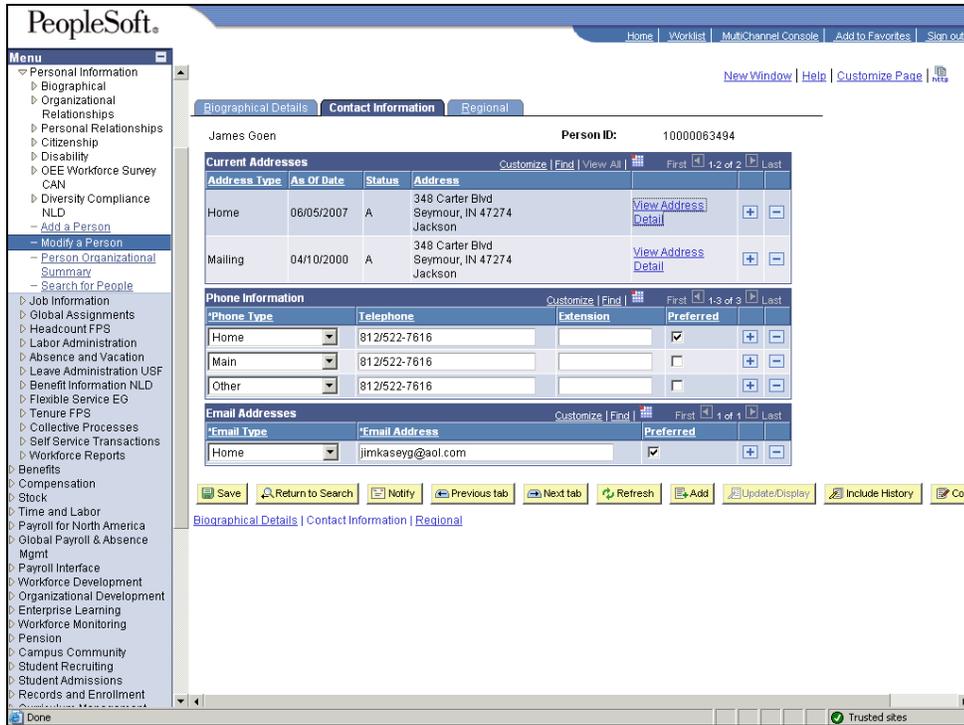


Step	Action
5.	Enter the effective date of rehire into the <b>*Effective Date</b> field.
6.	Click the <b>Edit Name</b> link and enter any necessary changes to the employee's name. 

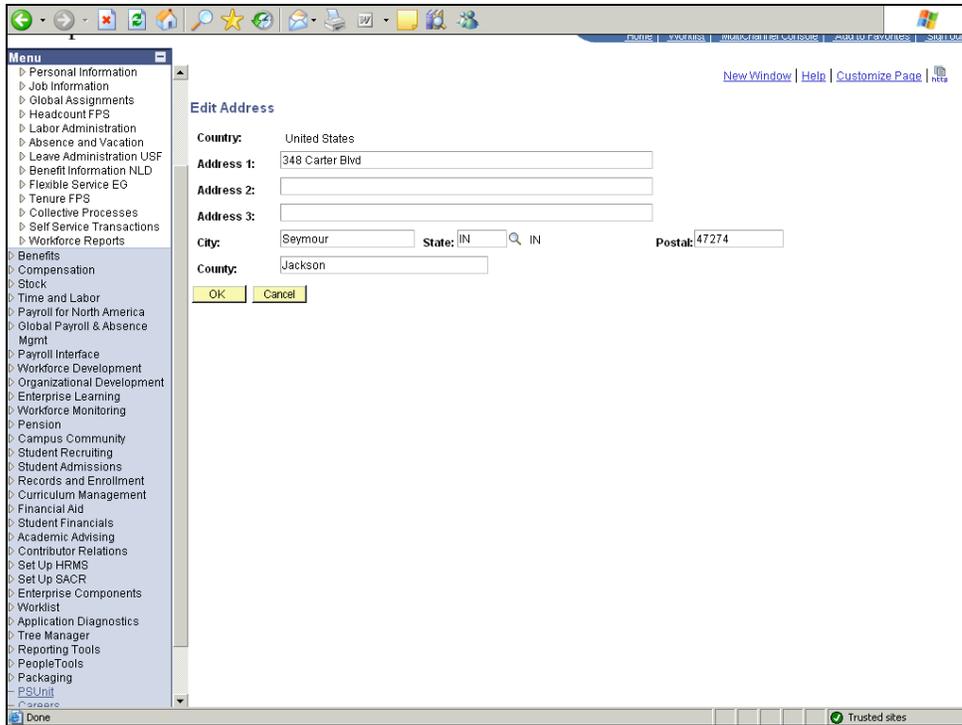


Step	Action
7.	Click the <b>OK</b> button. <div style="text-align: center;"> <input type="button" value="OK"/> </div>

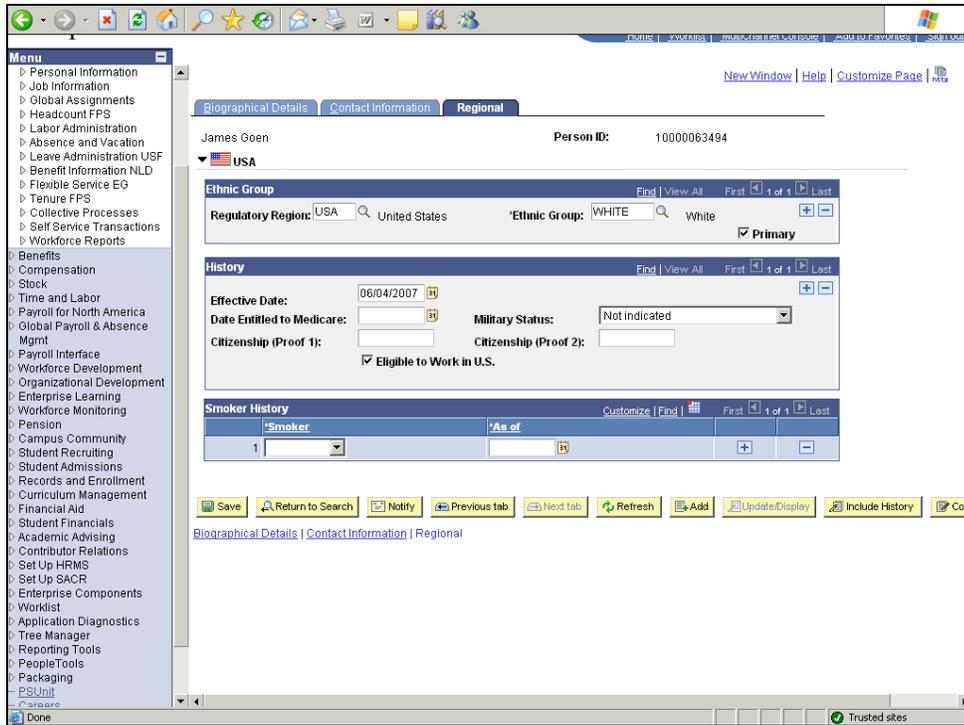
Step	Action
8.	Make any necessary changes to the employee's gender, highest education level, and/or marital status.
9.	Click the <b>Contact Information</b> tab. <a href="#">Contact Information</a>



Step	Action
10.	Verify the address is correct. To change the address, click the <b>Edit/View Address Detail</b> link. 
11.	Click the <b>Add a new row at row 1 (Alt+7)</b> button to add a new address. 
12.	Enter the effective date of rehire into the <b>Effective Date</b> field.
13.	Click the <b>Update/View Address</b> link. 
14.	Make any necessary changes to the employee's address.



Step	Action
15.	<p>Click the <b>OK</b> button.</p> <p>If there is a mailing address as well, be sure to update the effective date to reflect the date of rehire.</p> <div data-bbox="321 1157 423 1199" style="border: 1px solid black; padding: 2px; display: inline-block;">OK</div>

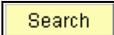


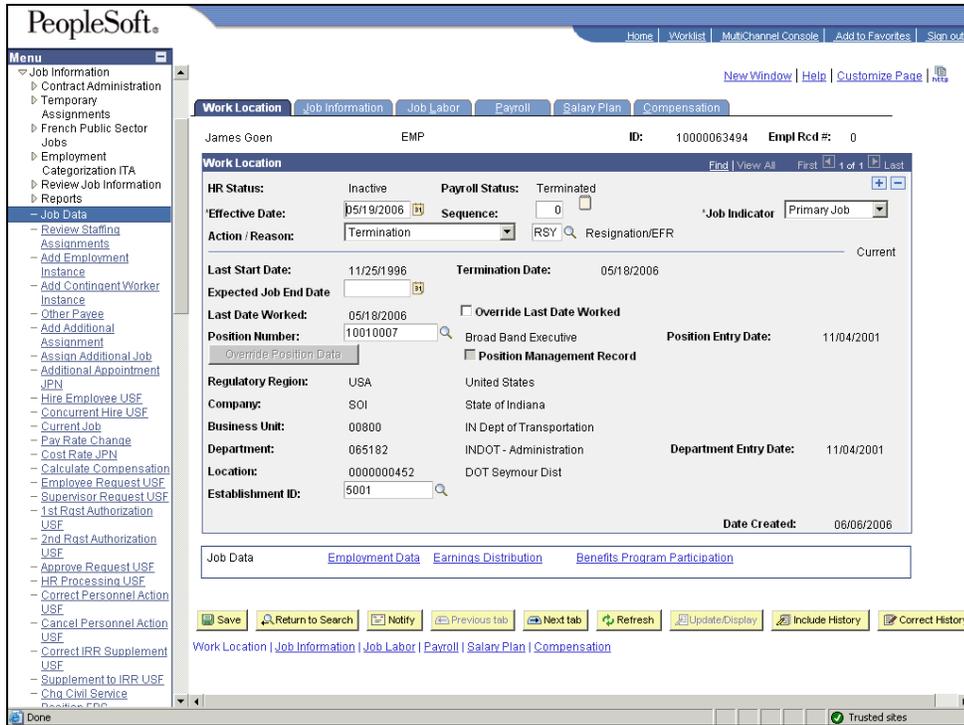
Step	Action
16.	Click the <b>Regional</b> tab. 
17.	Click the <b>Save</b> button. 
18.	Click the <b>Job Information</b> link. 

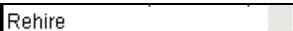
# Training Guide

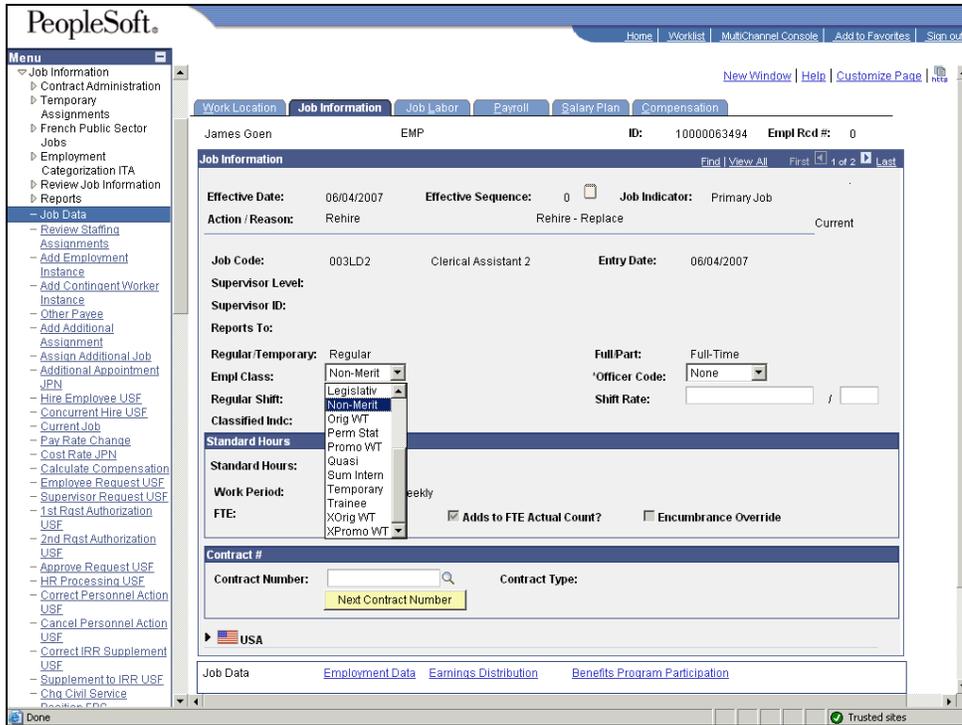
## Workforce Administration for Quasi Agencies v8.9



Step	Action
19.	Click the <b>Job Data</b> button. 
20.	Enter the employee's id number into the Employee ID field.
21.	Click the <b>Search</b> button. 



Step	Action
22.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
23.	Enter the effective date of rehire into the <b>*Effective Date</b> field. .
24.	Select Rehire from the list. 
25.	Enter the reason code into the <b>Reason Code</b> field. Enter " <b>rpl</b> ".
26.	Enter the PCN into the <b>Position Number</b> field.
27.	Press <b>[Tab]</b> .
28.	Click the <b>Job Information</b> tab. 



Step	Action
29.	Select the employee class from the list. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Quasi</div>
30.	Click the <b>Job Labor</b> tab. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Job Labor</div>

The screenshot shows the PeopleSoft interface for employee James Goen (ID: 10000063494). The 'Job Labor' tab is active, displaying various fields and sections:

- Effective Date:** 06/04/2007
- Effective Sequence:** 0
- Job Indicator:** Primary Job
- Action / Reason:** Rehire
- Union Code:** 00 (BU 00 - Exempt)
- Union Seniority Date:** 11/25/1996 (highlighted in blue)
- Assigned Seniority Dates Table:**

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
			<input type="checkbox"/>	
- Union Membership Details:**
  - Membership Status: Inactive
  - Member Category: [Field]
  - Position Held: [Field]

Step	Action
31.	Enter the effective date of rehire into the <b>Union Seniority Date</b> field.
32.	Click the <b>Compensation</b> tab. <a href="#">Compensation</a>

The screenshot displays the PeopleSoft Compensation page for James Goen (EMP ID: 10000063494). The page is titled 'Compensation' and shows the following details:

- Employee Information:** James Goen, EMP, ID: 10000063494, Empl Rcd #: 0
- Compensation Details:** Effective Date: 06/04/2007, Effective Sequence: 0, Job Indicator: Primary Job, Action/Reason: Rehire - Replace, Current.
- Compensation Rate:** 848.00 USD, Frequency: Biweekly.
- Pay Components Table:**

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NABWLY	0	848.000000	USD	B	
- Buttons:** Calculate Compensation, Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, Correct History.
- Links:** Job Data, Employment Data, Earnings Distribution, Benefits Program Participation.

Step	Action
33.	If necessary, update the bi-weekly compensation rate. When finished, click the <b>Calculate Compensation</b> button. 
34.	Click the <b>Employment Data</b> link. <a href="#">Employment Data</a>

The screenshot displays the PeopleSoft Workforce Administration interface for the employee James Goen (EMP ID: 10000063494). The main content area is titled "Employment Information" and is divided into three sections:

- Organizational Instance:** Shows the Original Start Date as 11/25/1996 and the Last Start Date as 11/25/1996. The Termination Date is 05/18/2006. The Org Instance Service Date is 11/25/1996. The duration is 9 years, 5 months, and 23 days.
- Organizational Assignment Data:** Shows the Last Assignment Start Date as 06/04/2007 and the First Assignment Start as 11/25/1996. The Assignment End Date is 05/18/2006. The Home/Host Classification is "Home".
- Instance Record:** Shows the Company Seniority Date as 04/02/1997 with an "Override" checkbox checked. The Benefits Service Date is 06/04/2007, also with an "Override" checkbox checked. Other fields include Probation Date (05/25/1997), Professional Experience Date, Date Last Increase (12/12/2004), Last Verification Date, and Business Title (Cler Asst 2).

At the bottom of the page, there are navigation buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History, and Correct History. A "Benefits Program Participation" link is visible in the bottom navigation bar.

Step	Action
35.	Enter the adjusted accrual date into the <b>Company Seniority Date</b> field.
36.	Click the <b>Refresh</b> button. 
37.	Enter the effective date of rehire into the <b>Benefits Service Date</b> field.
38.	Click the <b>Benefits Program Participation</b> link. <a href="#">Benefits Program Participation</a>

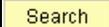
Step	Action
39.	Enter the BAS ID into the <b>BAS Group ID</b> field.
40.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
41.	Enter the effective date of rehire into the <b>*Effective Date</b> field. .
42.	Enter the NON into the <b>*Benefit Program</b> field.
43.	Click the <b>Save</b> button. 
44.	<b>End of Procedure.</b>

## Entering an Employee Transfer

### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 



Step	Action
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id into the <b>Search</b> field.
4.	Click the <b>Search</b> button. 

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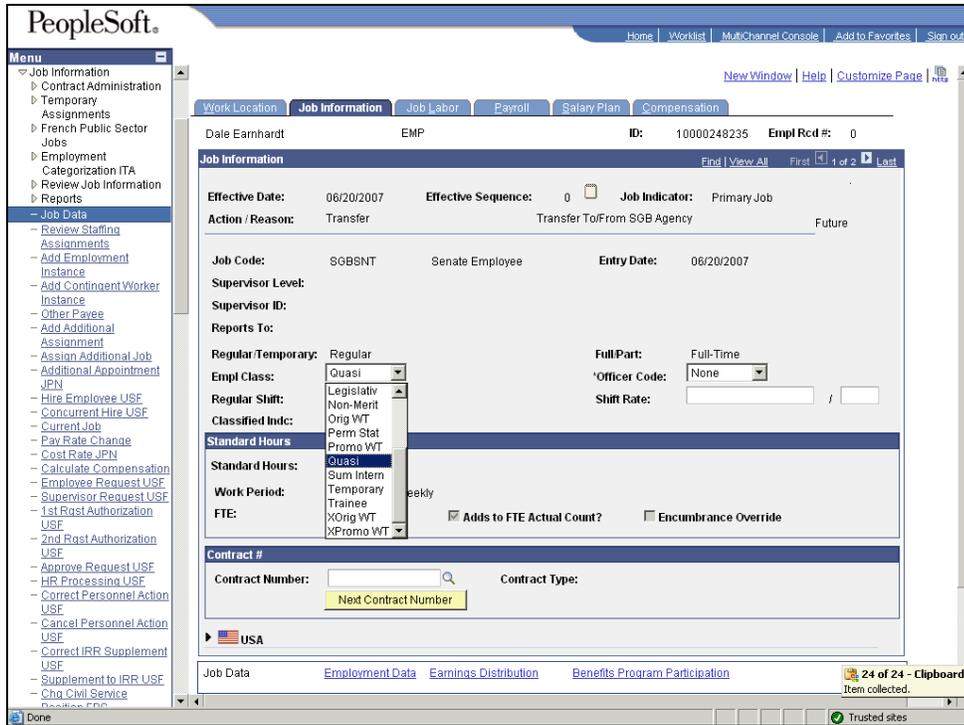
The screenshot shows the PeopleSoft Workforce Administration interface. The main content area displays the 'Job Information' tab for Dale Earnhardt (EMP ID: 10000248235). Key fields include:
 

- HR Status:** Active
- Payroll Status:** Active
- Effective Date:** 06/04/2007
- Sequence:** 0
- Job Indicator:** Primary Job
- Action / Reason:** Hire
- Position Number:** 10000033
- Position Title:** Cler Asst 2
- Regulatory Region:** USA
- Company:** SOI
- Business Unit:** 00030
- Department:** 001002
- Location:** 0000000809
- Establishment ID:** 00001

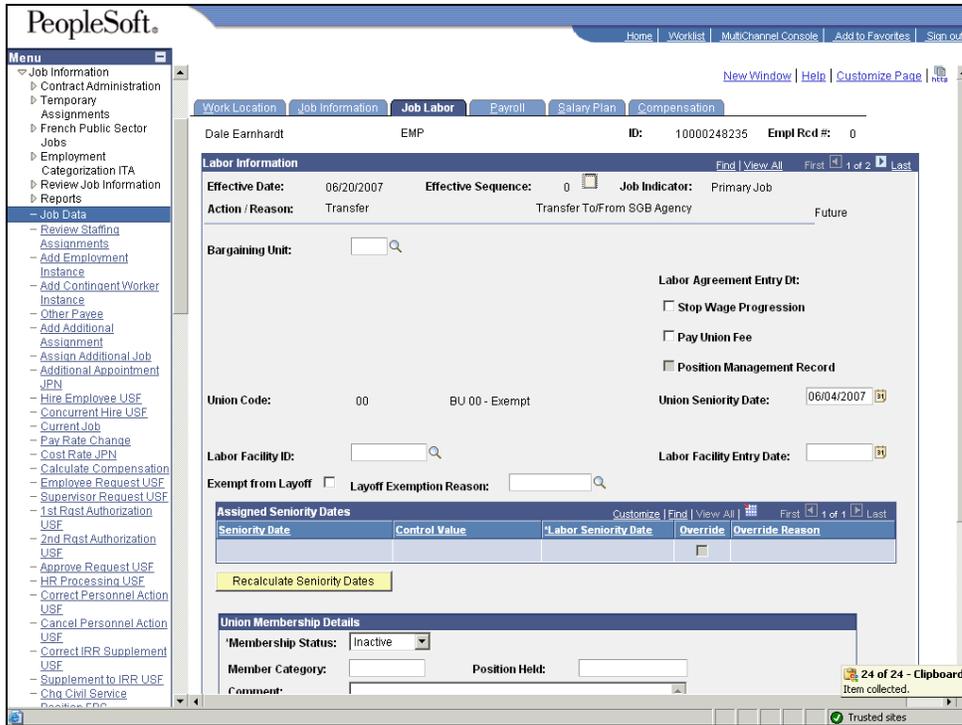
 The interface also features a left-hand menu, a top navigation bar, and a bottom toolbar with buttons like Save, Return to Search, and Refresh. A clipboard notification indicates 13 of 24 items collected.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the transfer effective date into the <b>*Effective Date</b> field.
7.	Click the <b>Employee Status</b> list. 
8.	Select Transfer from the list of Action codes. 
9.	Click the <b>Look up (Alt+5)</b> button. 
10.	Select the appropriate reason code from the list. 
11.	Enter the PCN into the <b>Position Number</b> field.
12.	Press <b>[Tab]</b> .
13.	Click the <b>Job Information</b> tab. 

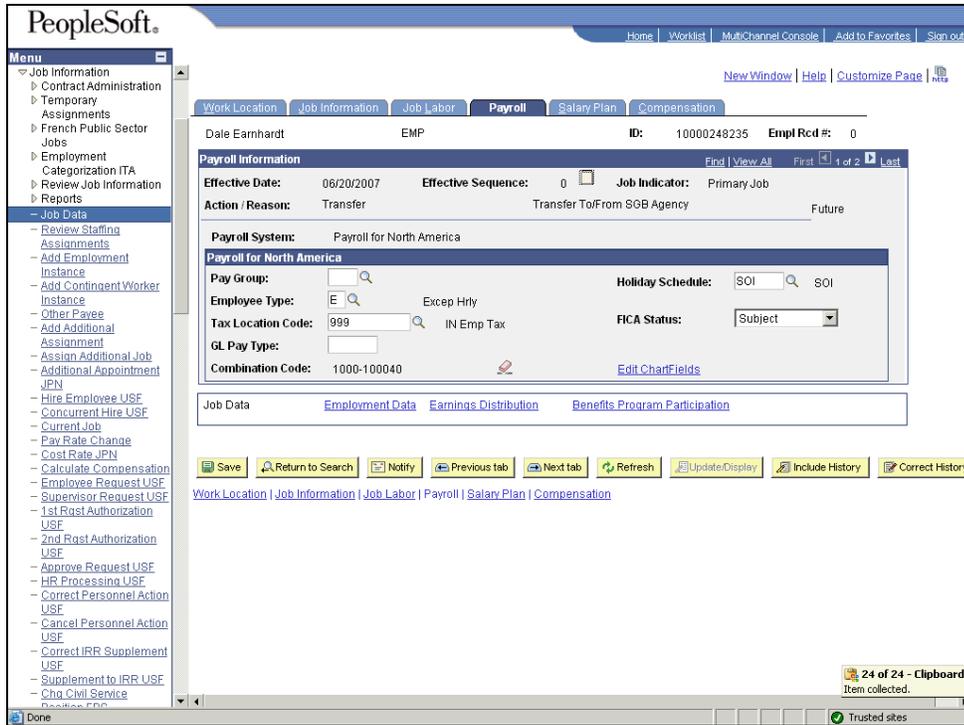
Last changed on: 6/26/2007 11:21:00 AM



Step	Action
14.	Select the appropriate Employee Class from the list. 
15.	Click the <b>Job Labor</b> tab. 



Step	Action
16.	Verify the Union Seniority Date reflects the initial date of hire or rehire. <div style="border: 1px solid black; padding: 2px; display: inline-block;">06/04/2007</div>
17.	Click the <b>Payroll</b> tab. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Payroll</div>



Step	Action
18.	Verify the pay group is entered correctly. If necessary, enter the desired information into the <b>Pay Group</b> field.
19.	Click the <b>Compensation</b> tab. 

PeopleSoft

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Menu

- Job Information
  - Contract Administration
  - Temporary Assignments
  - French Public Sector Jobs
  - Employment Categorization ITA
  - Review Job Information
  - Reports
  - Job Data
    - Review Staffing Assignments
    - Add Employment Instance
    - Add Contingent Worker Instance
    - Other Payee
    - Add Additional Assignment
    - Assign Additional Job
    - Additional Appointment JPN
    - Hire Employee USE
    - Concurrent Hire USE
    - Current Job
    - Pay Rate Change
    - Cost Rate JPN
    - Calculate Compensation
    - Employee Request USE
    - Supervisor Request USE
    - 1st Rost Authorization USE
    - 2nd Rost Authorization USE
    - Approve Request USE
    - HR Processing USE
    - Correct Personnel Action USE
    - Cancel Personnel Action USE
    - Correct IRR Supplement USE
    - Supplement to IRR USE
    - Chg Civil Service Position FPP

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Dale Earnhardt EMP ID: 10000248235 Empl Rcd #: 0

Compensation Find | View All First 1 of 2 Last

Effective Date: 06/20/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Transfer Transfer To/From SOB Agency Future

Compensation Rate: 0.00 USD Frequency: B Biweekly

Comparative Information

Pay Rates

Pay Components Customize | Find First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NABWLY	0		USD	B	

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

24 of 24 - Clipboard  
Item not Collected; Delete items to increase available space

Done Trusted sites

Step	Action
20.	Enter the bi-weekly compensation rate into the <b>Comp Rate</b> field.
21.	Click the <b>Calculate Compensation</b> button. 

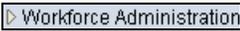
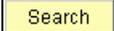
The screenshot displays the PeopleSoft Workforce Administration interface. The left-hand menu is expanded to 'Job Data', with 'Benefits Program Participation' highlighted. The main content area shows the 'Employment Information' section for Dale Earnhardt (EMP), ID: 10000248235, Empl Rcd #: 0. Below this, the 'Organizational Instance' section shows details for an instance with Rcd: 0, Original Start Date: 06/04/2007, and Last Start Date: 06/04/2007. The 'Organizational Assignment Data' section shows an 'Instance Record' with Last Assignment Start Date: 06/04/2007, Home/Host Classification: Home, and Company Seniority Date: 06/04/2007. At the bottom of the main area, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. A '24 of 24 - Clipboard' notification is visible in the bottom right corner.

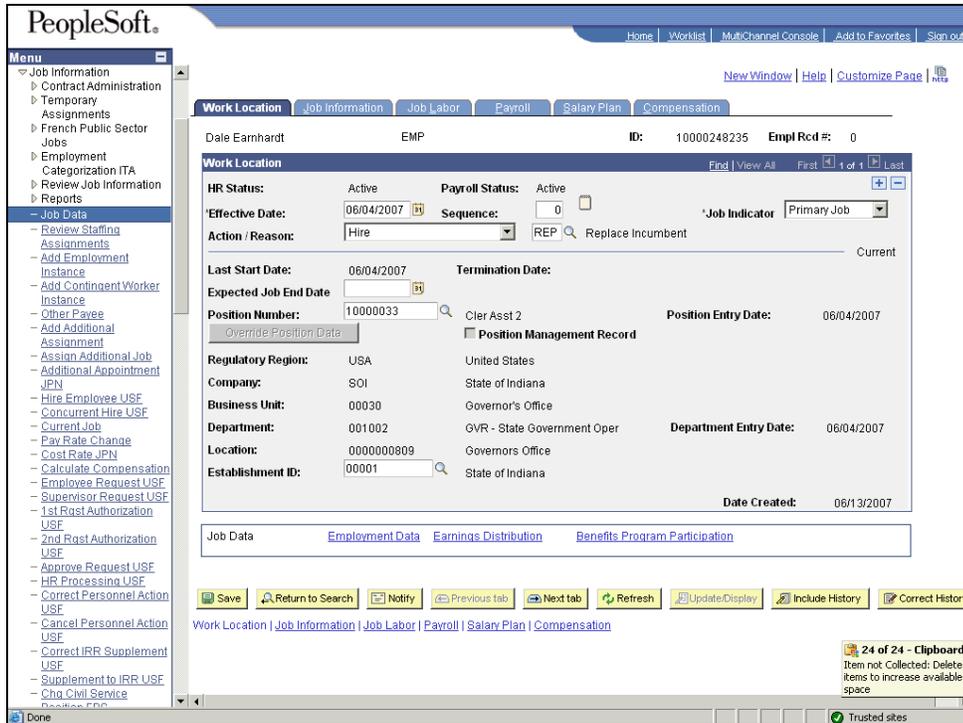
Step	Action
22.	Click the <b>Benefits Program Participation</b> link. If necessary, update the BAS Group ID. <a href="#">Benefits Program Participation</a>

Step	Action
23.	Click the <b>Save</b> button. 
24.	<b>End of Procedure.</b>

## Entering a Promotion

### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the Employee ID Number into the <b>Search</b> field.
4.	Click the <b>Search</b> button. 



Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date of the promotion into the <b>*Effective Date</b> field.
7.	Click the <b>Employee Status</b> list. 
8.	Select Promotion from the list. 
9.	Click the <b>Look up (Alt+5)</b> button. 
10.	Select the appropriate reason code from the list of values. 
11.	Enter the PCN into the <b>Position Number</b> field.
12.	Press <b>[Tab]</b> .
13.	Click the <b>Job Information</b> tab. 

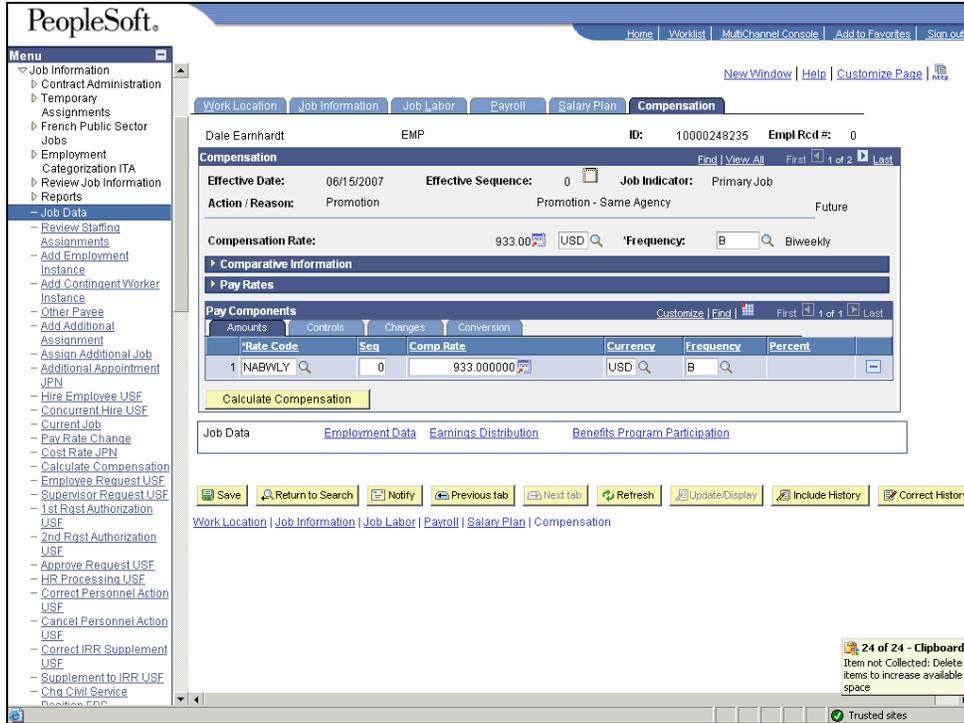
# Training Guide

## Workforce Administration for Quasi Agencies v8.9

The screenshot shows the PeopleSoft Job Information page for Dale Earnhardt. The page is divided into several tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The Job Information tab is currently selected. The page displays the following information:

- Employee Information:** Dale Earnhardt, EMP, ID: 10000248235, Empl Rcd #: 0
- Job Information:** Effective Date: 06/15/2007, Effective Sequence: 0, Job Indicator: Primary Job, Action / Reason: Promotion, Promotion - Same Agency, Future
- Job Details:** Job Code: 003LD1, Clerical Assistant 1, Entry Date: 06/15/2007
- Supervisor Information:** Supervisor ID: (blank), Reports To: (blank)
- Regular/Temporary:** Regular
- Full Part:** Full-Time
- Empl Class:** Quasi (dropdown menu)
- Officer Code:** None (dropdown menu)
- Regular Shift:** 1
- Shift Rate:** (blank)
- Classified Indc:** Unclassifd
- Standard Hours:** 37.50
- Work Period:** W Weekly
- FTE:** 1.000000, Add to FTE Actual Count? (checked), Encumbrance Override (unchecked)
- Contract #:** Contract Number: (blank), Contract Type: (blank)

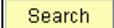
Step	Action
14.	Select the appropriate Empl Class from the list of values. 
15.	Click the <b>Job Labor</b> tab. 
16.	Click the <b>Payroll</b> tab and verify the pay group is correct. 
17.	Click the <b>Compensation</b> tab. 

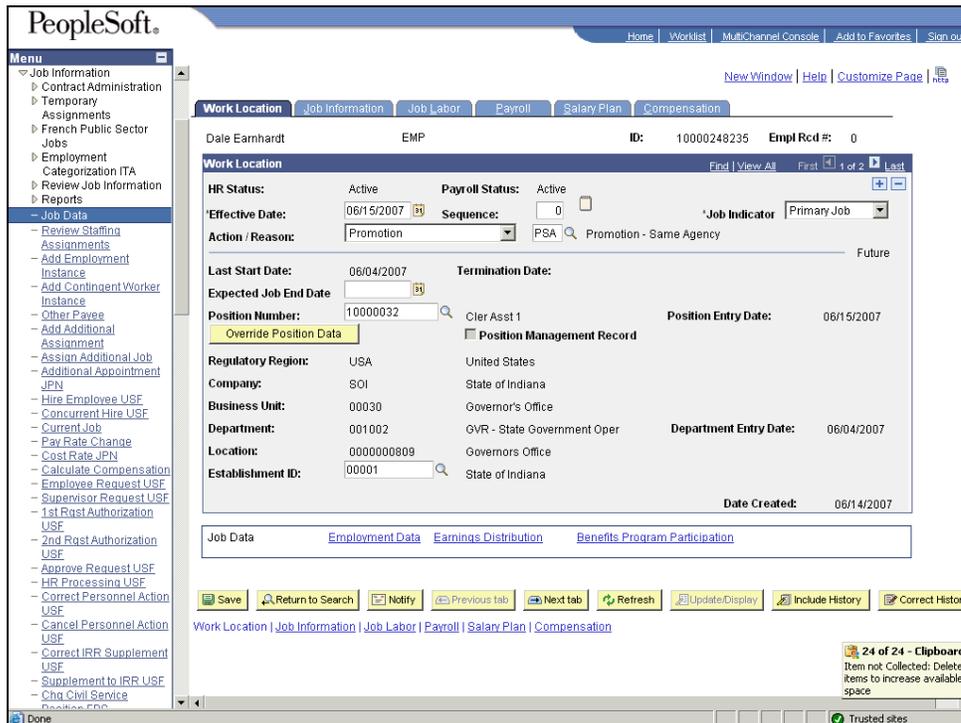


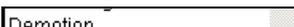
Step	Action
18.	If necessary, update the bi-weekly compensation rate. 
19.	Click the <b>Calculate Compensation</b> button. 
20.	Click the <b>Save</b> button. 
21.	<b>End of Procedure.</b>

## Entering a Demotion

### Procedure

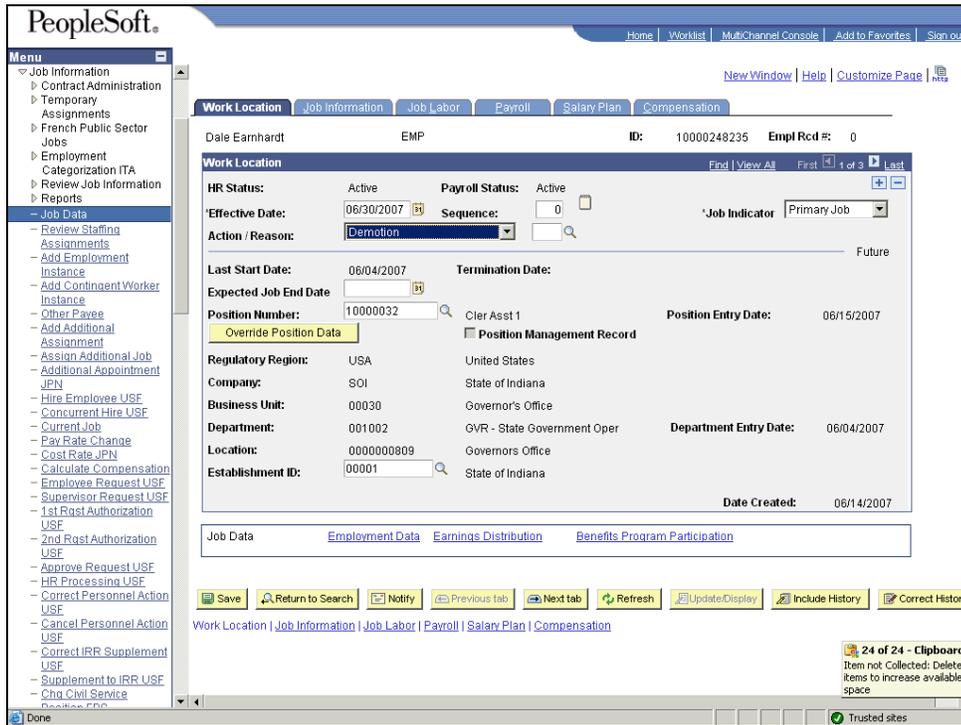
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the <b>Search</b> field.
4.	Click the <b>Search</b> button. 



Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date of the demotion into the <b>*Effective Date</b> field.
7.	Select Demotion from the list. 

Last changed on: 6/26/2007 11:21:00 AM

Step	Action
8.	Select the appropriate reason from the list of values. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <span style="border: 1px solid black; padding: 0 5px;">DSP</span> Demo - Same Agcy w/Pay Change                 </div>



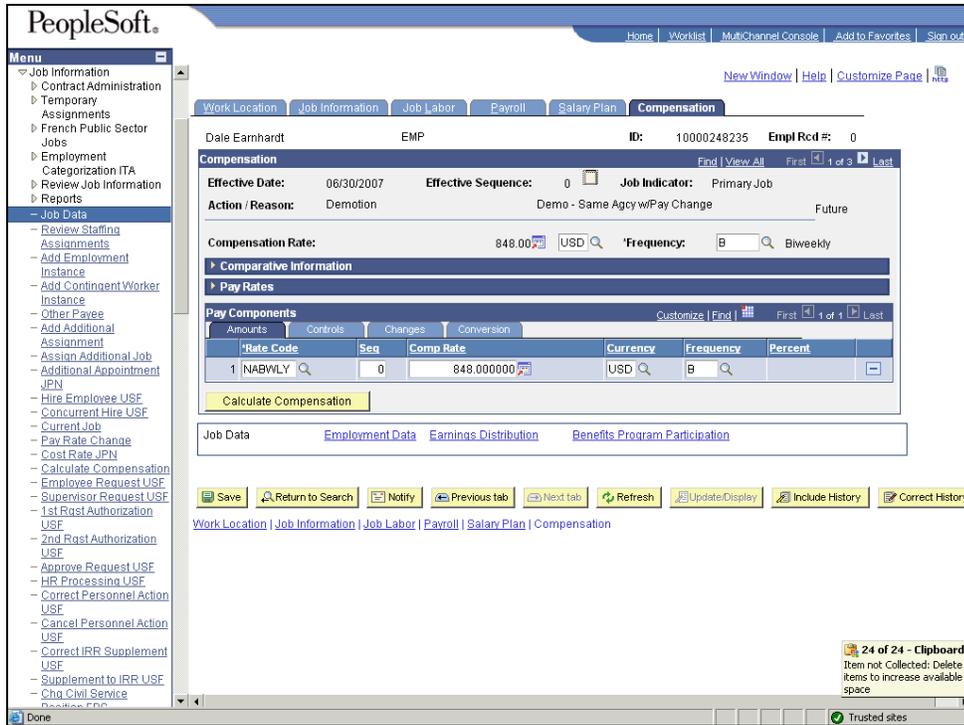
Step	Action
9.	Enter the PCN into the <b>Position Number</b> field.
10.	Press <b>[Tab]</b> .
11.	Click the <b>Job Information</b> tab. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <span style="border: 1px solid black; padding: 0 5px;">Job Information</span> </div>

# Training Guide

## Workforce Administration for Quasi Agencies v8.9

The screenshot shows the PeopleSoft Job Information page for Dale Earnhardt. The page is divided into several sections: Job Information, Standard Hours, and Contract #. The Job Information section includes fields for Effective Date, Effective Sequence, Job Indicator, Action/Reason, Job Code, Supervisor Level, Reports To, Regular/Temporary, Empl Class, Full Part, Officer Code, Regular Shift, and Classified Indc. The Standard Hours section includes Standard Hours, Work Period, and FTE. The Contract # section includes Contract Number and Contract Type. The Compensation tab is highlighted at the bottom of the page.

Step	Action
12.	Change the employee class if necessary. 
13.	Click the <b>Compensation</b> tab. 



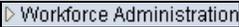
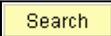
Step	Action
14.	If necessary, adjust the bi-weekly <input type="text" value="848.000000"/>
15.	Click the <b>Calculate Compensation</b> button. <input type="button" value="Calculate Compensation"/>
16.	Click the <b>Save</b> button. <input type="button" value="Save"/>
17.	<b>End of Procedure.</b>



## Updating Personal Information

## Updating Biographical Information

### Procedure

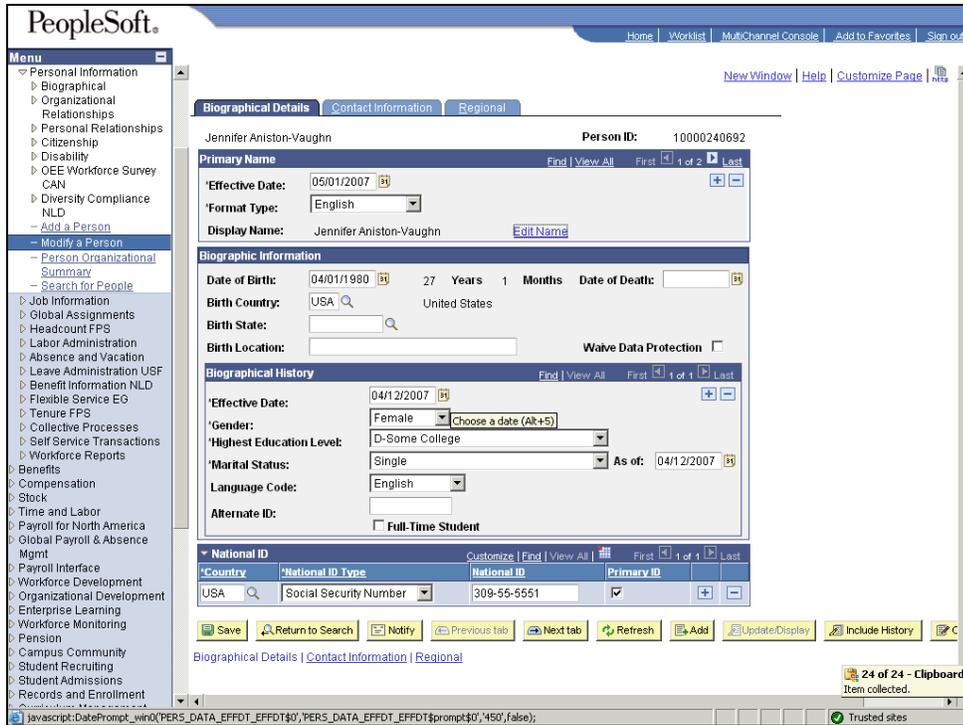
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Modify a Person</b> button. 
3.	Enter the employee id number into the <b>Personal Information</b> field. Enter <b>"10000240692"</b> .
4.	Click the <b>Search</b> button. 

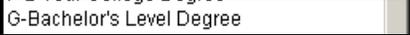
Step	Action
5.	To make a name change, click the <b>Add a new row at row 1 (Alt+7)</b> button. 

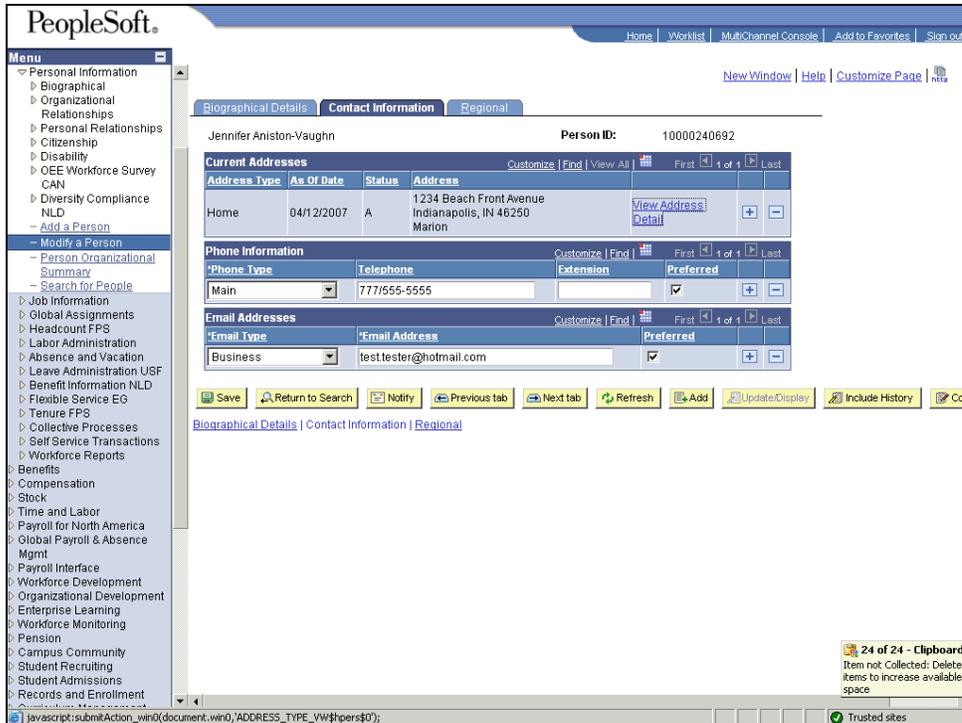
Last changed on: 6/26/2007 11:21 AM

Step	Action
6.	Enter the effective date into the <b>*Effective Date</b> field. Enter " <b>050107</b> ".
7.	Click the <b>Edit Name</b> link. <a href="#">Edit Name</a>

Step	Action
8.	This example reflects a change in the employee's last name. Enter the last name into the <b>Last Name</b> field.
9.	Click the <b>OK</b> button. <input type="button" value="OK"/>

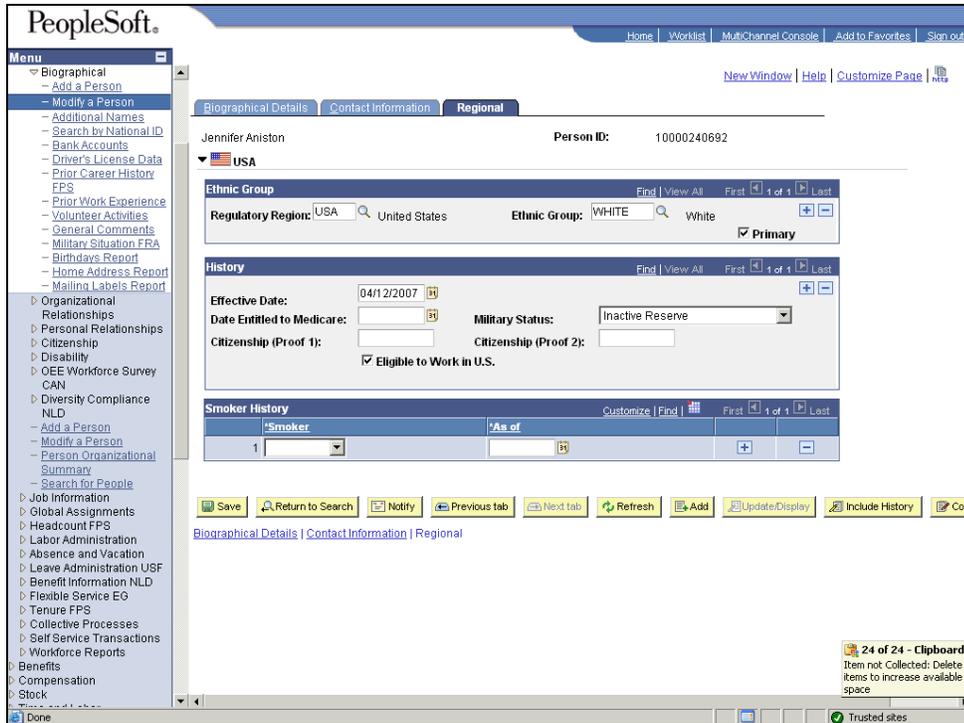


Step	Action
10.	To make a change to the employee's gender, highest education level, or marital status, click the <b>Add a new row at row 1 (Alt+7)</b> button in the Biographical History section. 
11.	Enter the effective date of the change into the <b>*Effective Date</b> field.
12.	Click the <b>*Highest Education Level</b> list. 
13.	Select the correct education level. 
14.	Click the <b>*Marital Status</b> list. 
15.	Select the correct marital status. 
16.	Enter the effective date of the marital status change into the <b>As of</b> field.
17.	Click the <b>Contact Information</b> tab. 



Step	Action
18.	Click the <b>Edit/View Address Detail</b> link. 
19.	Utilize the <b>Add Address</b> link to modify address information. 
20.	To add a telephone number, click the <b>Add a new row at row 1 (Alt+7)</b> button. 
21.	Select the correct phone type. 
22.	Enter the phone number into the <b>Telephone</b> field. Enter " <b>6025551213</b> ".
23.	To add an additional email address, click the <b>Add a new row at row 1 (Alt+7)</b> button. 
24.	Select the correct email type and enter the email address into the <b>*Email Address</b> field.
25.	Click the <b>Regional</b> tab. 

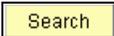
Last changed on: 6/26/2007 11:21:00 AM

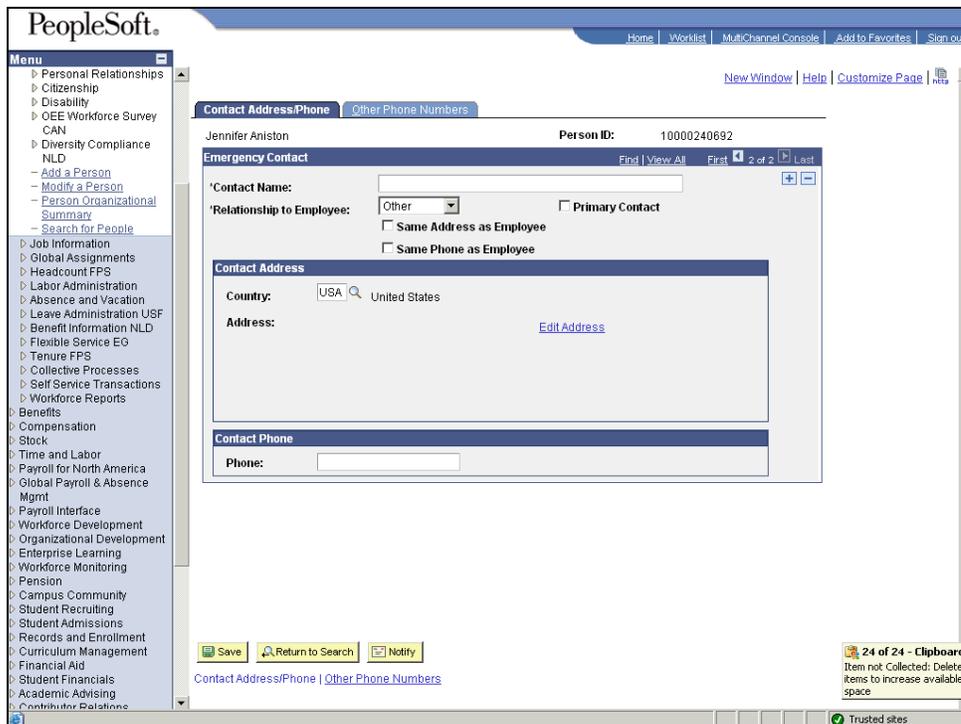


Step	Action
26.	When making a personal data change, verify that the Ethnic Group field has been populated. To record the employee's Ethnic Group, click the <b>Look up Ethnic Group (Alt+5)</b> button. 
27.	Click the <b>correct value</b> in the list.
28.	Click the <b>Save</b> button. 
29.	<b>End of Procedure.</b>

## Updating Emergency Contact Information

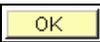
### Procedure

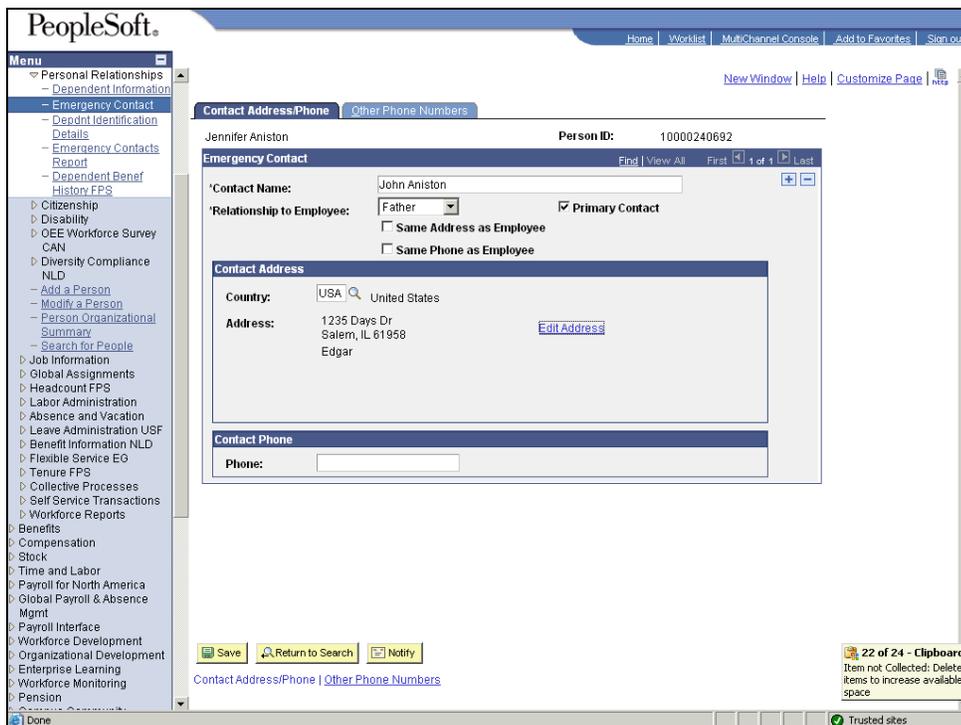
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Personal Information</b> button. 
3.	Click the <b>Emergency Contact</b> button. 
4.	Enter the employee id number into the <b>EmplID</b> field.
5.	Click the <b>Search</b> button. 



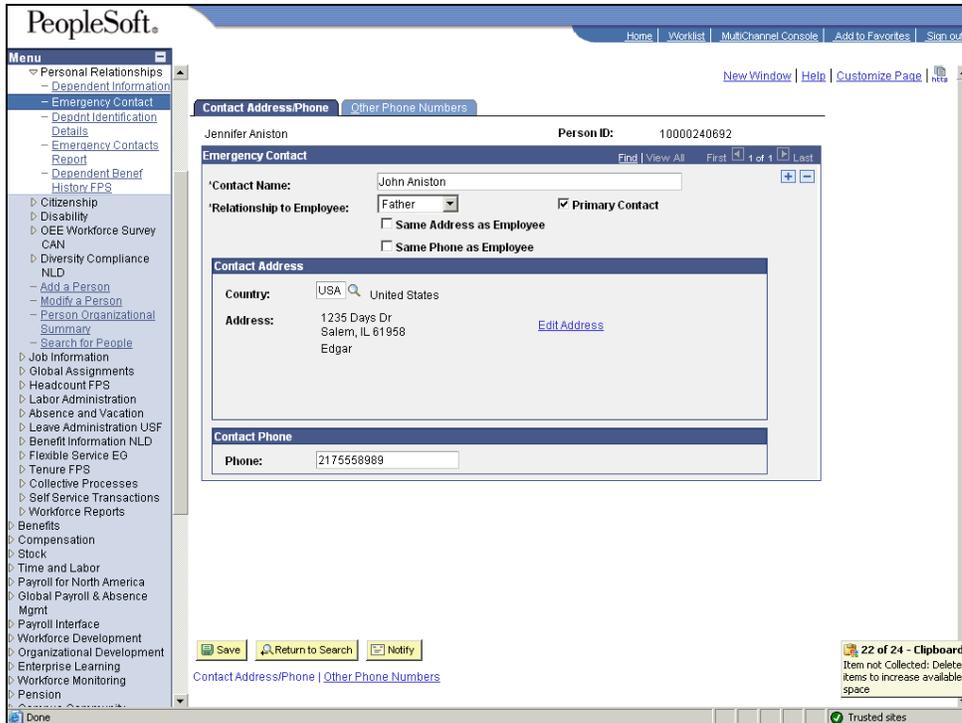
Step	Action
6.	Enter the contact's name into the <b>*Contact Name</b> field.

Last changed on: 6/26/2007 11:21:00 AM

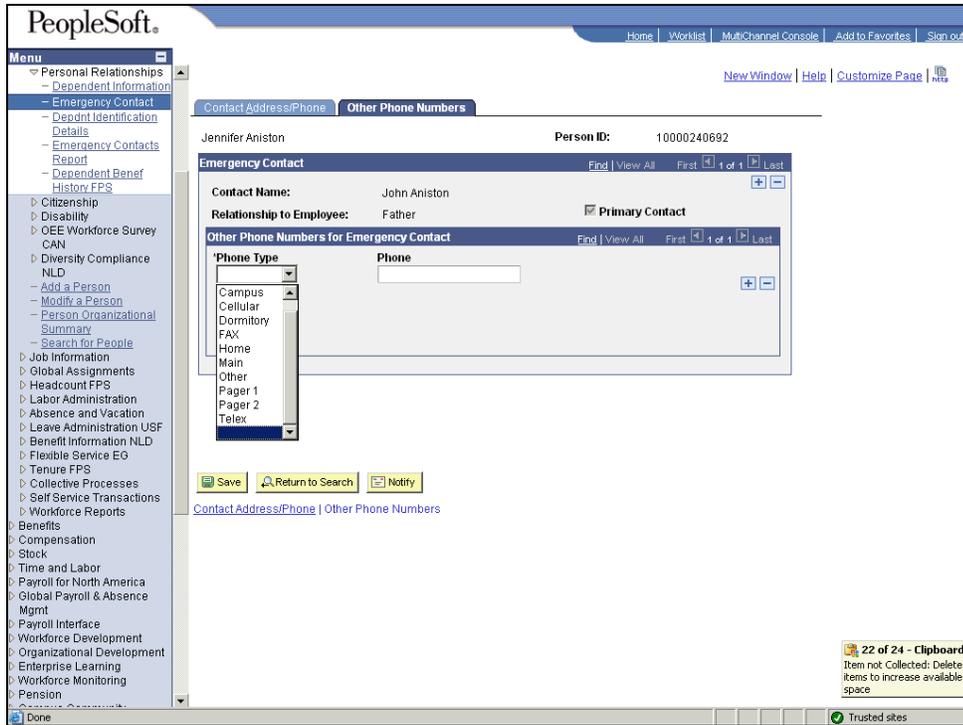
Step	Action
7.	Select the correct relationship. 
8.	Click the <b>Primary Contact</b> option. 
9.	Click the <b>Edit Address</b> link. 
10.	Enter the contact's address into the <b>Address 1</b> field.
11.	Enter the contact's city into the <b>City</b> field.
12.	Enter the contact's state into the <b>State</b> field.
13.	Enter the contact's zip code into the <b>Postal</b> field.
14.	Enter the contact's county into the <b>County</b> field.
15.	Click the <b>OK</b> button. 



Step	Action
16.	Enter the contact's phone number into the <b>Phone</b> field. Enter " <b>2175558989</b> ".



Step	Action
17.	Click the <b>Other Phone Numbers</b> tab. <a href="#">Other Phone Numbers</a>



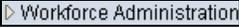
Step	Action
18.	Select the correct phone type from the list.
19.	Enter the contact's phone number into the <b>Phone</b> field. Enter " <b>2172514655</b> ".
20.	Click the <b>Save</b> button. 
21.	<b>End of Procedure.</b>

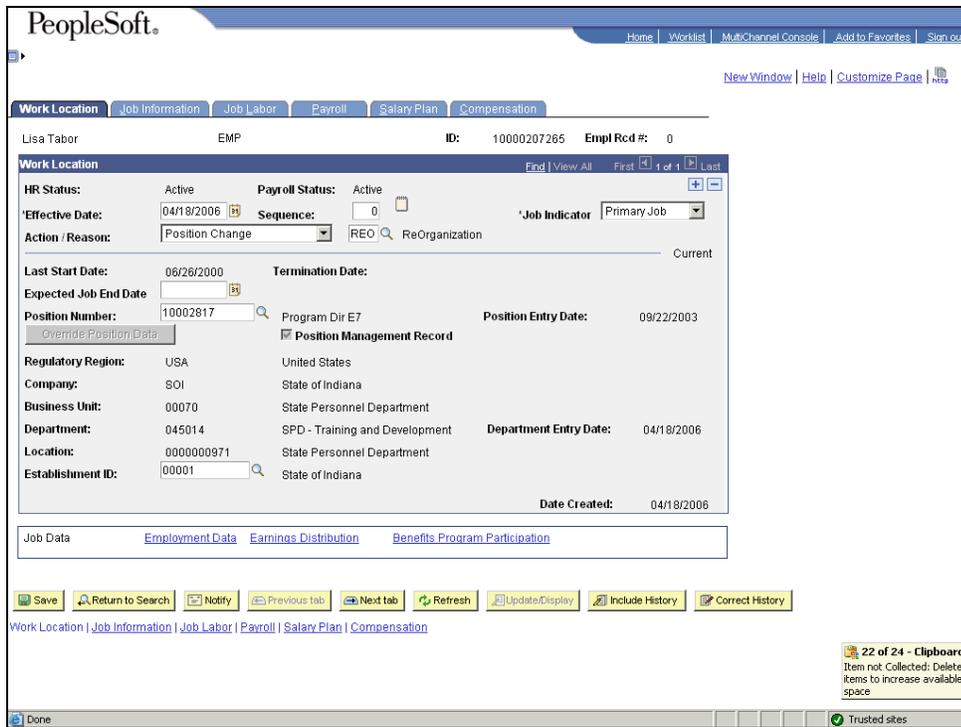


## Entering Employment Actions

### Entering a Pay Rate Change

#### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee's id number into the field.
4.	Click the <b>Search</b> button. 



The screenshot shows the PeopleSoft Workforce Administration interface. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main content area is titled "Work Location" and displays details for employee Lisa Tabor (EMP ID: 10000207265, Empl Rcd #: 0). The "Job Data" tab is active, showing fields for HR Status (Active), Payroll Status (Active), Effective Date (04/18/2006), Sequence (0), and Job Indicator (Primary Job). The Action/Reason is set to Position Change (REO - ReOrganization). Other fields include Last Start Date (06/26/2000), Termination Date, Expected Job End Date, Position Number (10002817), Program Dir (E7), Position Entry Date (09/22/2003), Regulatory Region (USA), Company (SOI), Business Unit (00070), Department (045014), Location (0000000971), and Establishment ID (00001). The Date Created is 04/18/2006. At the bottom, there are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A status bar at the bottom right shows "22 of 24 - Clipboard" and "Trusted sites".

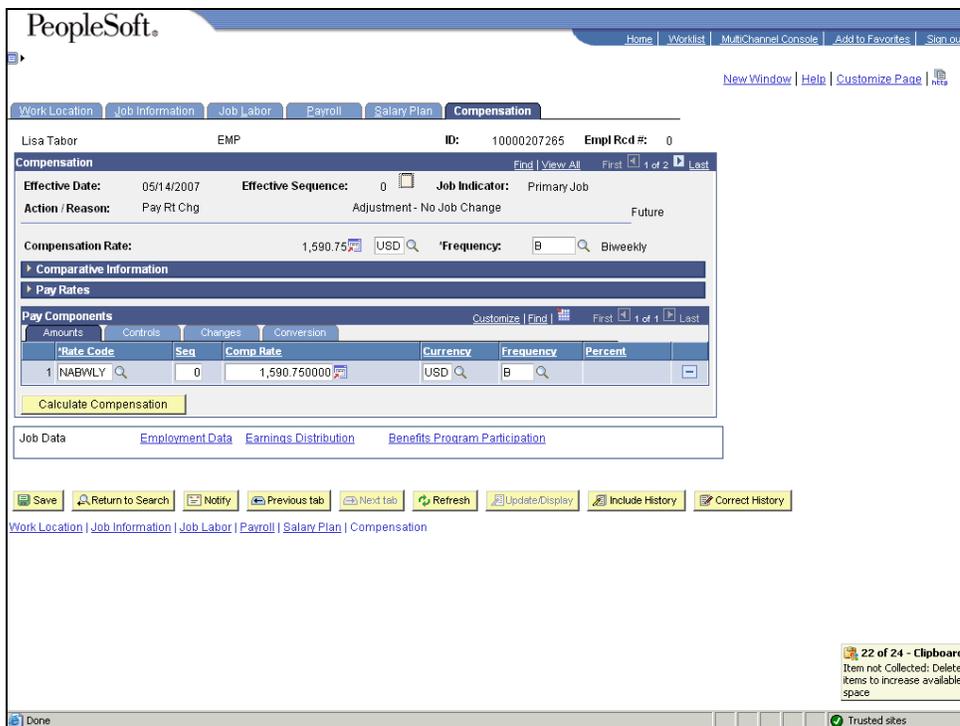
Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field. Enter " <b>051407</b> ".

Last changed on: 6/26/2007 11:21 AM

# Training Guide

## Workforce Administration for Quasi Agencies v8.9

Step	Action
7.	Press <b>[Tab]</b> .
8.	Click the <b>Employee Status</b> list. 
9.	Select <b>Pay Rate Change</b> from the Action list. 
10.	Enter the correct reason code into the <b>Date Created</b> field.
11.	Click the <b>Compensation</b> tab. 

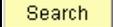


Step	Action
12.	Enter the new biweekly salary into the <b>Comp Rate</b> field.
13.	Click the <b>Calculate Compensation</b> button. 
14.	Click the <b>Save</b> button. 
15.	<b>End of Procedure.</b>

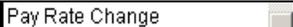
Last changed on: 6/26/2007 11:21:00 AM

## Begin Working Leader Assignment

### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the field.
4.	Click the <b>Search</b> button. 

The screenshot shows the PeopleSoft Workforce Administration interface. The user is logged in as Jennifer Aniston (EMP ID: 10000240692, Empl Rcd #: 0). The 'Work Location' tab is active, displaying details for a job position. Key information includes: HR Status: Active, Payroll Status: Active, Effective Date: 04/12/2007, Position Number: 10002978, and Location: DNR - Central Office. The interface also shows navigation options like 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Press the <b>[Tab]</b> key.
8.	Select <b>Pay Rate Change</b> from the Action list. 

Last changed on: 6/26/2007 11:21 AM

Step	Action
9.	Click the <b>Look up (Alt+5)</b> button to view a list of reason codes. 
10.	Select <b>Position Status Change</b> from the list of reason codes. 



PeopleSoft. Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | 

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Jennifer Aniston EMP ID: 10000240692 Empl Rcd #: 0

Work Location Find | View All First 1 of 2 Last

HR Status: Active Payroll Status: Active

Effective Date: 05/01/2007 Sequence: 0 Job Indicator: Primary Job

Action / Reason: Position Change STA  Position Status Change

Last Start Date: 04/12/2007 Termination Date: Current

Expected Job End Date

Position Number: 10002978 Accountant 2 Position Entry Date: 04/12/2007

**Override Position Data**  Position Management Record

Regulatory Region: USA United States

Company: SOI State of Indiana

Business Unit: 00300 Dept of Natural Resources

Department: 055166 DNR - Manpower/Vacancy Department Entry Date: 04/12/2007

Location: 0000000248 DNR - Central Office

Establishment ID: 00001  State of Indiana

Date Created: 05/12/2007

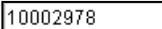
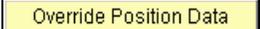
Job Data Employment Data Earnings Distribution Benefits Program Participation

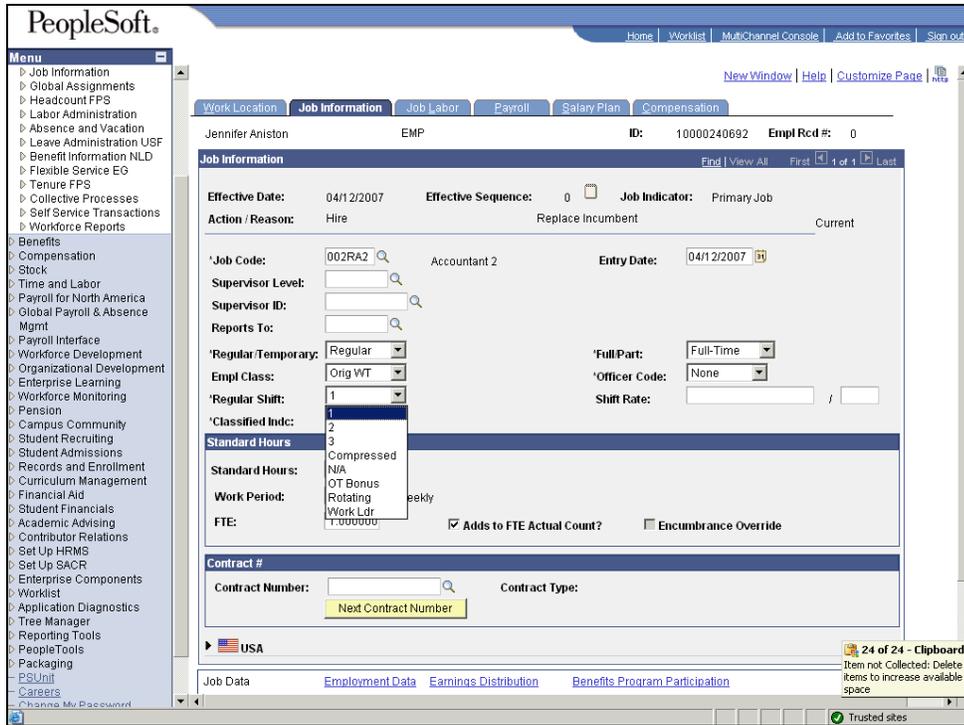
Save  Return to Search  Notify  Previous tab  Next tab  Refresh  Update/Display  Include History  Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

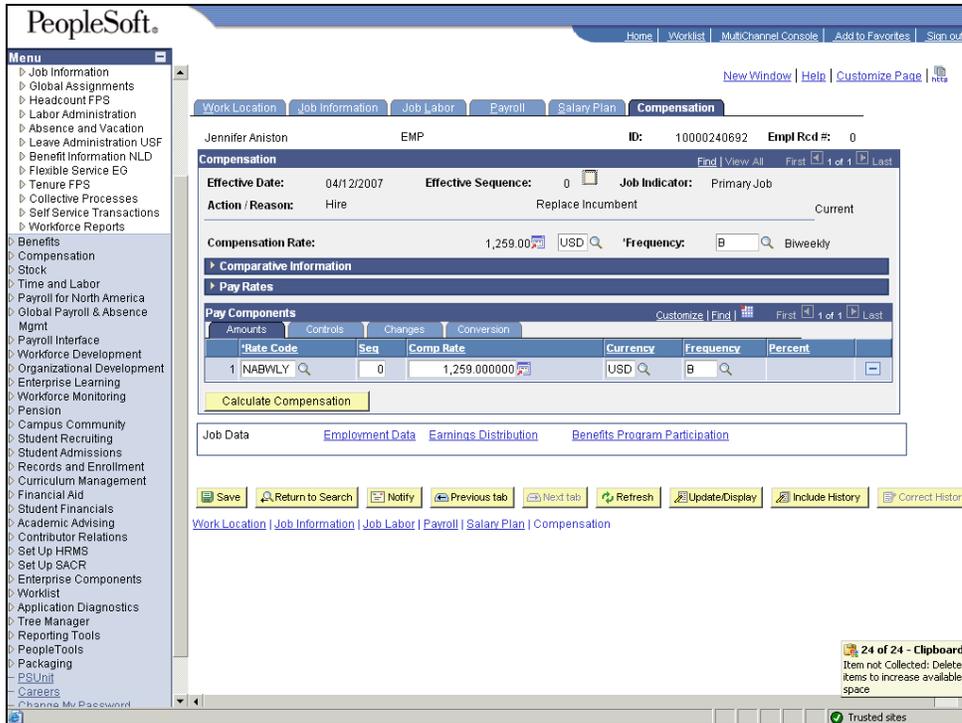
22 of 24 - Clipboard  
Item not Collected; Delete items to increase available space

Done Trusted sites

Step	Action
11.	Verify the position number is correct and change if necessary. 
12.	Click the <b>Override Position Data</b> button. 
13.	Click the <b>Job Information</b> tab. 



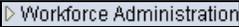
Step	Action
14.	Select <b>Work Ldr</b> from the list. <div style="border: 1px solid black; padding: 2px; width: fit-content;">Work Ldr</div>
15.	Click the <b>Compensation</b> tab. <div style="border: 1px solid black; padding: 2px; width: fit-content; background-color: #e0e0e0;">Compensation</div>

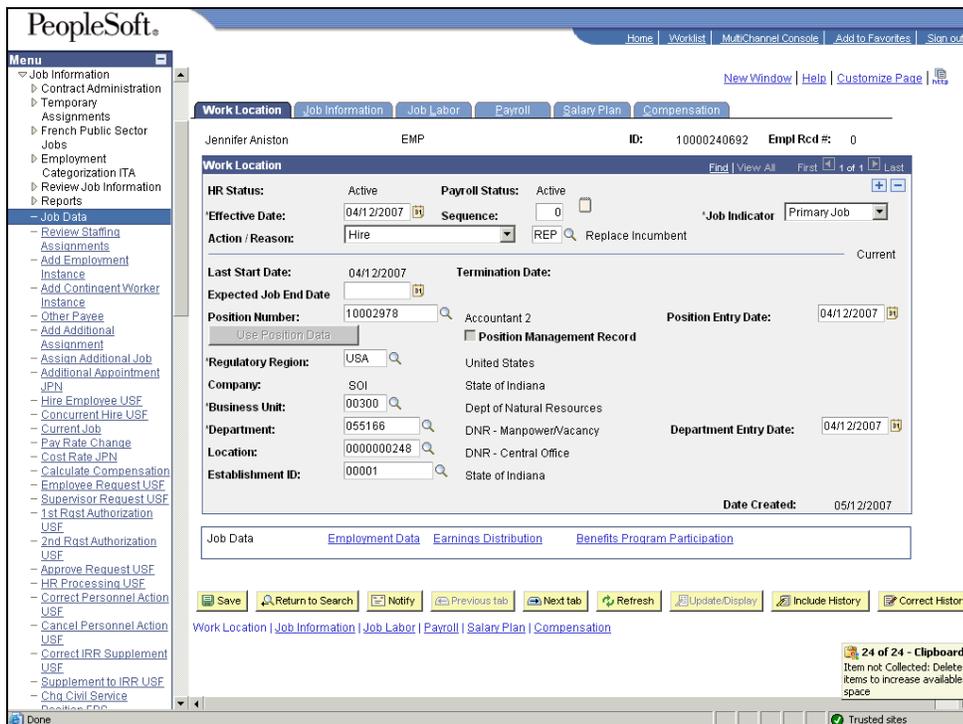


Step	Action
16.	If necessary adjust the biweekly rate of pay in the <b>Comp Rate</b> field. 
17.	Click the <b>Calculate Compensation</b> button. 
18.	Click the <b>Save</b> button. 
19.	<b>End of Procedure.</b>

## End Working Leader Assignment

### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee into the <b>Job Information</b> field.
4.	Click the <b>Search</b> button. 



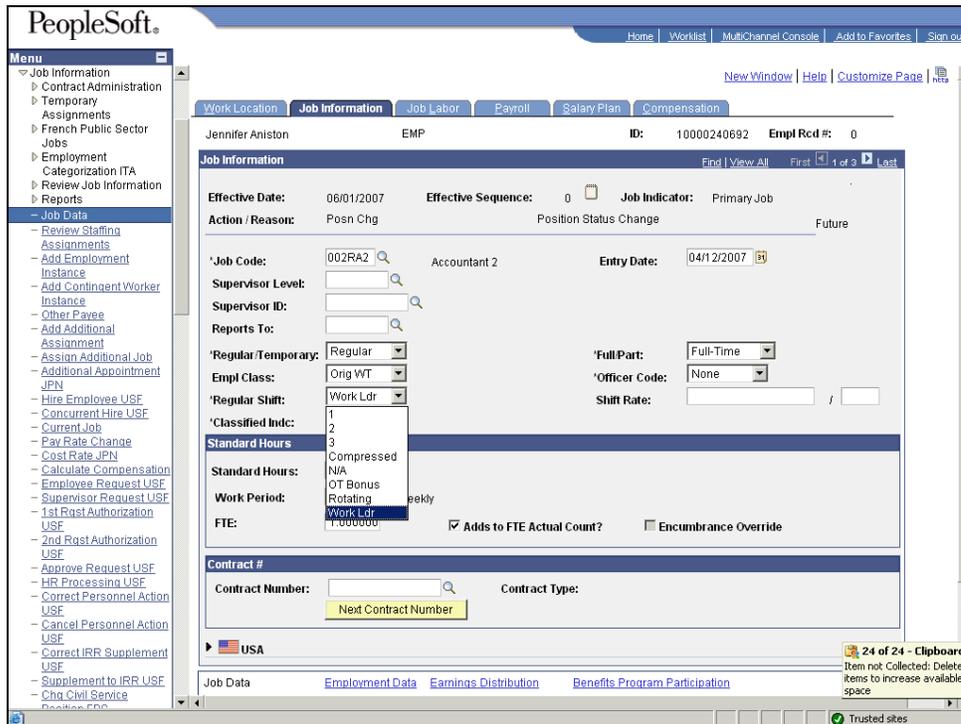
The screenshot shows the PeopleSoft Workforce Administration interface. The 'Job Information' field is active, displaying details for Jennifer Aniston (EMP ID: 10000240692). The 'Work Location' section is expanded, showing fields for HR Status (Active), Payroll Status (Active), Effective Date (04/12/2007), Sequence (0), Job Indicator (Primary Job), Action/Reason (Hire), Last Start Date (04/12/2007), Termination Date, Expected Job End Date, Position Number (10002978), Position Entry Date (04/12/2007), Regulatory Region (USA), Company (SOI), Business Unit (00300), Department (055166), Location (0000000248), and Establishment ID (00001). The interface includes a menu on the left, a top navigation bar, and a bottom toolbar with buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.

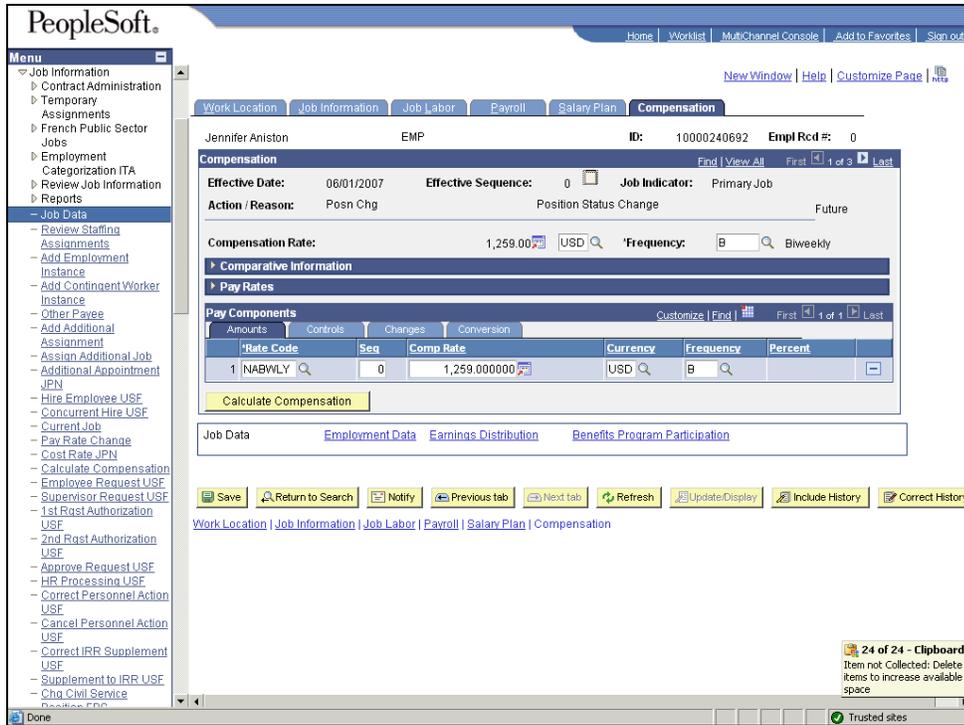
# Training Guide

## Workforce Administration for Quasi Agencies v8.9

Step	Action
7.	Select <b>Position Change</b> from the <b>Employee Status</b> list. <div style="border: 1px solid black; padding: 2px; width: fit-content;">Position Change</div>
8.	Enter <b>STA</b> into the <b>Reason Code</b> field.



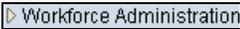
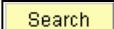
Step	Action
9.	Select <b>1</b> from the list of values. <div style="border: 1px solid black; padding: 2px; width: fit-content;">1</div>
10.	Click the <b>Compensation</b> tab. <div style="border: 1px solid black; padding: 2px; width: fit-content; background-color: #e0e0e0;">Compensation</div>

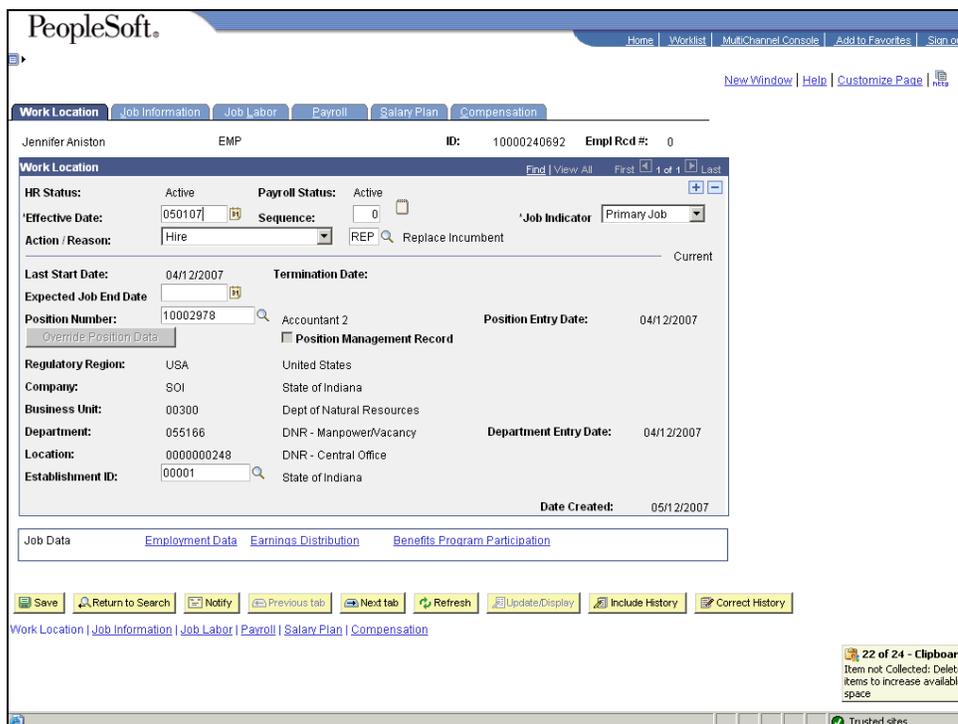


Step	Action
11.	Adjust the biweekly compensation rate in the <b>Comp Rate</b> field. <input type="text" value="1,259.000000"/>
12.	Click the <b>Calculate Compensation</b> button. <input type="button" value="Calculate Compensation"/>
13.	Click the <b>Save</b> button. <input type="button" value="Save"/>
14.	<b>End of Procedure.</b>

## Permanent Status/Extend Working Test

### Procedure

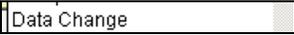
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the field.
4.	Click the <b>Search</b> button. 



The screenshot shows the PeopleSoft Workforce Administration interface. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below this, there are tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The main content area displays employee information for Jennifer Aniston (EMP ID: 10000240692, Empl Rcd #: 0). The 'Work Location' section is active, showing HR Status: Active, Payroll Status: Active, and Job Indicator: Primary Job. The 'Effective Date' is 05/01/07, and the 'Action / Reason' is Hire. The 'Position Number' is 10002978, and the 'Position Entry Date' is 04/12/2007. The 'Regulatory Region' is USA, and the 'Company' is SOI. The 'Department' is DNR - Manpower/Vacancy, and the 'Department Entry Date' is 04/12/2007. The 'Location' is DNR - Central Office, and the 'Establishment ID' is 00001. The 'Date Created' is 05/12/2007. At the bottom, there are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A clipboard warning message is visible in the bottom right corner: '22 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field. .

Last changed on: 6/26/2007 11:21:00 AM

Step	Action
7.	Select <b>Data Change</b> from the list. 
8.	Click the <b>Look up (Alt+5)</b> button. 
9.	Select the appropriate reason code ( <b>Completed Working Test or Extended Working Test</b> ) from the list. 



PeopleSoft. Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | 

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Jennifer Aniston EMP ID: 10000240692 Empl Rcd #: 0

Work Location Find | View All First 1 of 2 Last

HR Status: Active Payroll Status: Active

Effective Date: 05/01/2007 Sequence: 0 Job Indicator: Primary Job

Action / Reason: Data Change CWT Completed Working Test

Last Start Date: 04/12/2007 Termination Date:

Expected Job End Date:

Position Number: 10002978 Accountant 2 Position Entry Date: 04/12/2007

Override Position Data Position Management Record

Regulatory Region: USA United States

Company: SOI State of Indiana

Business Unit: 00300 Dept of Natural Resources

Department: 055166 DNR - Manpower/Vacancy Department Entry Date: 04/12/2007

Location: 0000000248 DNR - Central Office

Establishment ID: 00001 State of Indiana

Date Created: 05/12/2007

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

22 of 24 - Clipboard  
Item not Collected: Delete items to increase available space

Done Trusted sites

Step	Action
10.	Click the <b>Job Information</b> tab. 

# Training Guide

## Workforce Administration for Quasi Agencies v8.9

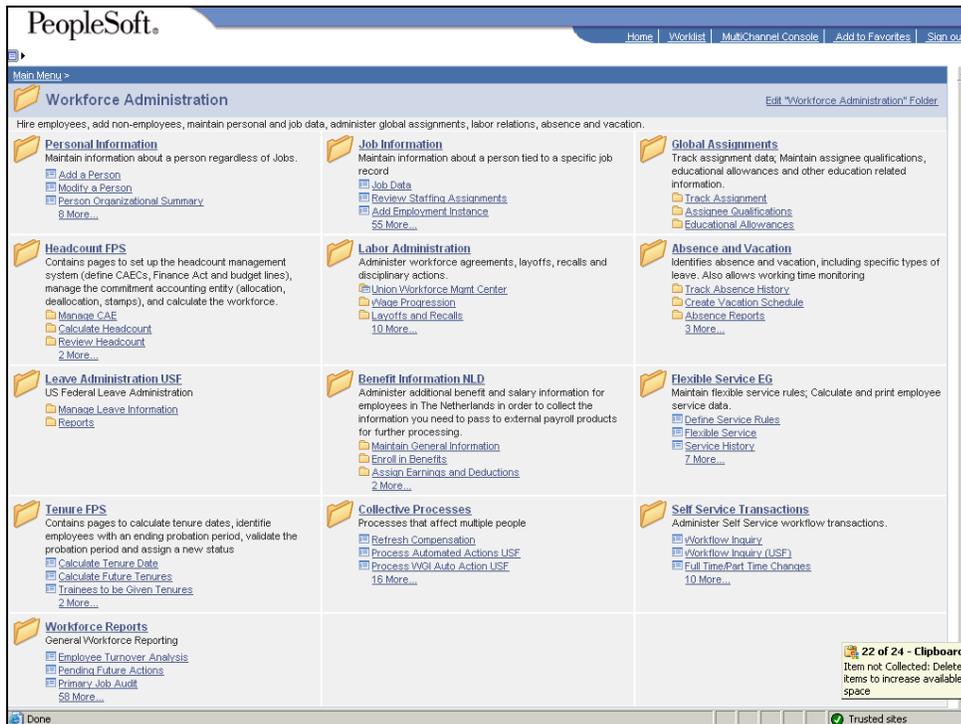
The screenshot displays the 'Job Information' tab in the PeopleSoft system. The employee is Jennifer Aniston (EMP ID: 10000240692). The job code is 002RA2 (Accountant 2) with an entry date of 04/12/2007. The 'Empl Class' dropdown menu is open, showing options: Orig WT, Legislativ, Non-Merit, **Perm Stat**, XOrig WT, and XPromo WT. The 'Save' button is highlighted in yellow. Other fields include 'Regular Temporary' (Regular), 'Full Part' (Full-Time), and 'Officer Code' (None).

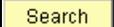
Step	Action
11.	Select the appropriate employee class ( <b>Perm Status, XOrig WT, or XPromo WT</b> ). 
12.	Scroll to the bottom of the page.
13.	Click the <b>Save</b> button. 
14.	<b>End of Procedure.</b>

## Entering a Suspension

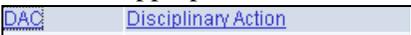
### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 



Step	Action
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id into the field.
4.	Click the <b>Search</b> button. 

The screenshot shows the PeopleSoft Work Location form for Jennifer Aniston. The form is titled "Work Location" and includes a navigation bar with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The employee's name is Jennifer Aniston, EMP ID is 10000240692, and Empl Rcd # is 0. The form displays various fields including HR Status (Active), Payroll Status (Active), Effective Date (04/12/2007), Position Number (10002978), and Department (DNR - Manpower/Vacancy). The form also includes a "Date Created" field set to 05/12/2007. At the bottom of the form, there are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A clipboard notification is visible in the bottom right corner, stating "22 of 24 - Clipboard Item not Collected: Delete items to increase available space".

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Select <b>Suspension</b> from the list. 
8.	Click the <b>Look up (Alt+5)</b> button. 
9.	Select the appropriate reason code from the list. 

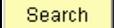
The screenshot displays the 'Work Location' page for Jennifer Aniston (EMP ID: 10000240692). The page is divided into several sections:
 

- Employee Information:** Name (Jennifer Aniston), EMP ID (10000240692), Empl Rcd # (0).
- Work Location Summary:** HR Status (Active), Payroll Status (Suspended), Effective Date (05/01/2007), Sequence (0), Job Indicator (Primary Job).
- Dates and Actions:** Last Start Date (04/12/2007), Termination Date, Expected Job End Date, Last Date Worked (04/30/2007), and Expected Return Date.
- Position Details:** Position Number (10002978), Position Name (Accountant 2), Position Entry Date (04/12/2007).
- Organizational Structure:** Regulatory Region (USA), Company (SOI), Business Unit (00300), Department (055166), Location (0000000248), and Establishment ID (00001).

 At the bottom, there are navigation buttons like 'Save', 'Return to Search', and 'Notify', along with a 'Job Data' link and a 'Date Created' field (05/12/2007).

Step	Action
10.	Click the <b>Save</b> button. 
11.	<b>End of Procedure.</b>

## Entering a Termination Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the <b>EmplID</b> field.
4.	Click the <b>Search</b> button. 

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PeopleSoft

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Jennifer Aniston EMP ID: 10000240692 Empl Rcd #: 0

Work Location Find | View All First 1 of 1 Last

HR Status: Active Payroll Status: Active

Effective Date: 04/12/2007 Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire REP Replace Incumbent

Last Start Date: 04/12/2007 Termination Date:

Expected Job End Date

Position Number: 10002978 Accountant 2 Position Entry Date: 04/12/2007

Regulatory Region: USA United States

Company: SOI State of Indiana

Business Unit: 00300 Dept of Natural Resources

Department: 055166 DNR - Manpower/Vacancy Department Entry Date: 04/12/2007

Location: 0000000248 DNR - Central Office

Establishment ID: 000001 State of Indiana

Date Created: 05/12/2007

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

22 of 24 - Clipboard  
Item not Collected: Delete items to increase available space

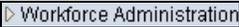
Done Trusted sites

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Select <b>Termination</b> from the list. 
8.	Enter the correct reason code into the <b>Reason</b> field.
9.	Click the <b>Save</b> button. 
10.	<b>End of Procedure.</b>

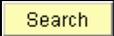
## Family Status Change

### Family Status Change

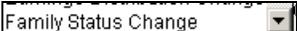
#### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 



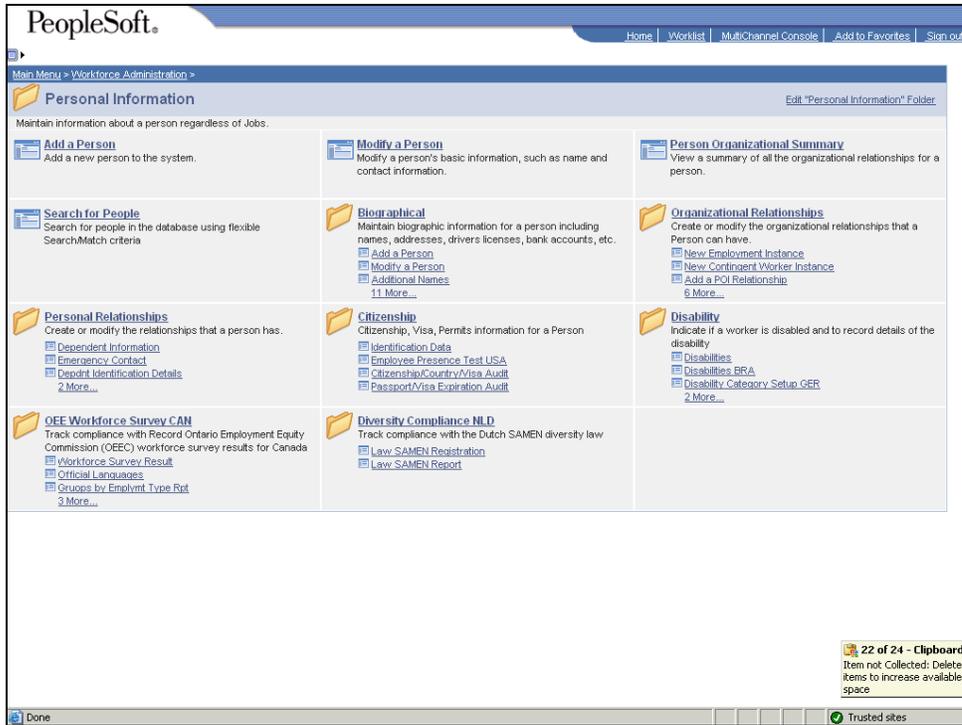
Step	Action
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the field.
4.	Click the <b>Search</b> button. 

The screenshot shows the PeopleSoft Work Location form for Jennifer Aniston. The form is titled 'Work Location' and includes a navigation bar with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The employee's name is Jennifer Aniston, EMP ID is 10000240692, and Empl Rcd # is 0. The form displays various fields including HR Status (Active), Payroll Status (Active), Effective Date (04/12/2007), Position Number (10002978), and Location (State of Indiana). It also includes a 'Save' button and a 'Clipboard' notification.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date of the family status change into the <b>*Effective Date</b> field.
7.	Select <b>Family Status Change</b> from the list of <b>Action</b> codes. 
8.	Click the <b>Look up (Alt+5)</b> button. 
9.	Select the appropriate reason code from the list. 
10.	Click the <b>Save</b> button. 

The screenshot shows the PeopleSoft Work Location page for Jennifer Aniston. The page includes a navigation bar with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The main content area displays employee information such as ID (10000240692), Empl Rcd # (0), and HR Status (Active). It also shows job details like Position Number (10002978), Position Entry Date (04/12/2007), and Department (DNR - Manpower/Vacancy). A 'Family Status Change' action is visible, and the page includes various utility buttons like Save, Refresh, and Correct History.

Step	Action
11.	As a result of a marriage, divorce, or death of a spouse, the employee's personal data may require modification. In this example, the employee has submitted a family status change due to marriage, which will require the user to update the employee's last name and marital status.  Click the <b>Expand (Ctrl+Y) Menu</b> button.
12.	Click the <b>Personal Information</b> link. 



Step	Action
13.	Click the <b>Modify a Person</b> button. 
14.	Enter the employee id number into the <b>Biographical</b> field. Enter " <b>1000240692</b> ".
15.	Click the <b>Search</b> button. 

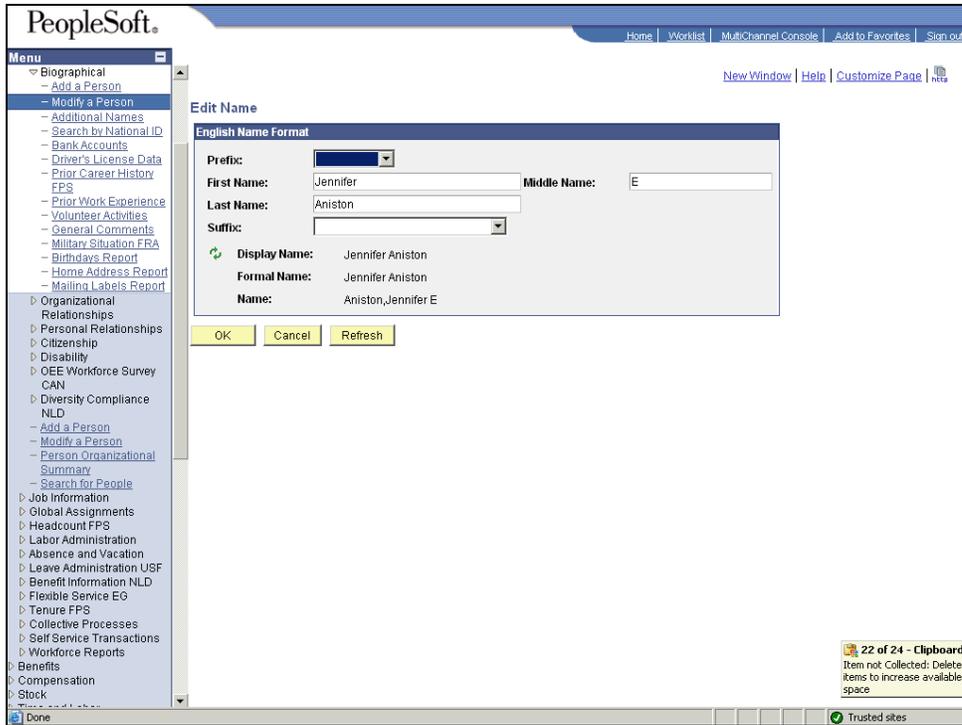
The screenshot shows the PeopleSoft interface for a person's biographical details. The main content area is titled "Biographical Details" and includes the following sections:

- Biographical Details:** Jennifer Aniston, Person ID: 10000240692. Fields include Effective Date (04/12/2007), Format Type (English), and Display Name (Jennifer Aniston).
- Biographic Information:** Date of Birth (04/01/1980), Birth Country (USA), Birth State, Birth Location, and Waive Data Protection checkbox.
- Biographical History:** Effective Date (04/12/2007), Gender (Female), Highest Education Level (D-Some College), Marital Status (Single), Language Code (English), and Alternate ID checkbox.
- National ID Table:**

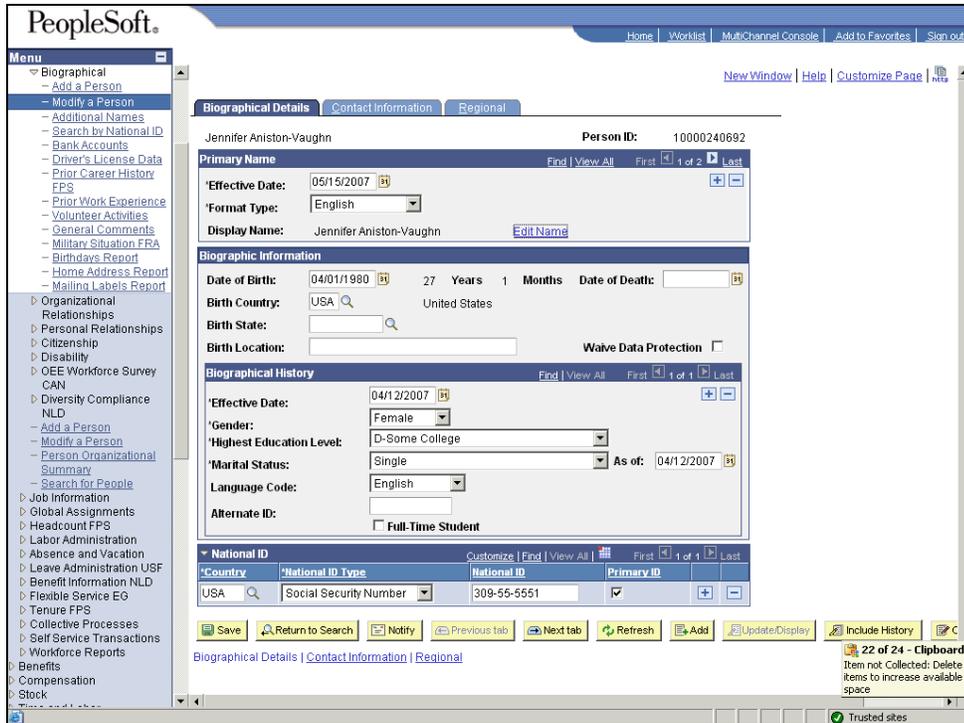
Country	National ID Type	National ID	Primary ID
USA	Social Security Number	309-55-5551	<input checked="" type="checkbox"/>

Navigation buttons at the bottom include Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, and Include History. A clipboard notification indicates 22 of 24 items were not collected.

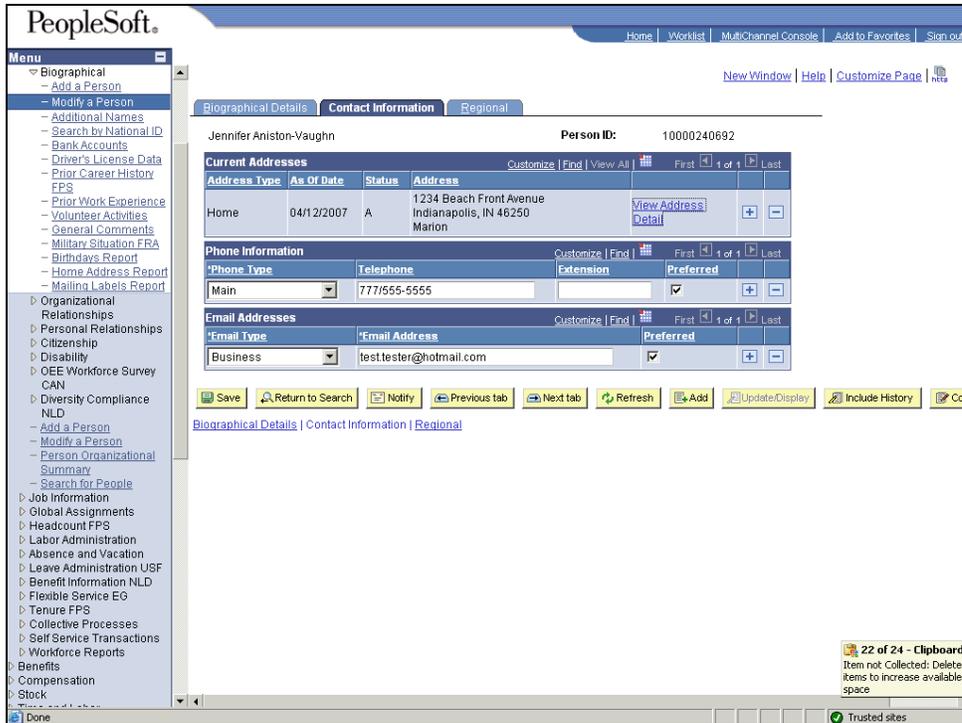
Step	Action
16.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
17.	Enter the effective date of the family status change into the <b>*Effective Date</b> field. Enter " <b>051507</b> ".
18.	Click the <b>Add Name</b> link. 



Step	Action
19.	Enter the last name into the <b>Last Name</b> field. Enter " <b>Vaughn</b> ".
20.	Click the <b>OK</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">OK</div>



Step	Action
21.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
22.	Enter the effective date of the family status change into the <b>*Effective Date</b> field. Enter " <b>051507</b> ".
23.	Select the appropriate marital status from the list. 
24.	Enter the effective date of the marital status change into the <b>As of</b> field.
25.	Click the <b>Contact Information</b> tab and make any necessary modifications to the employee's address, telephone, or email information. 

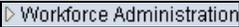


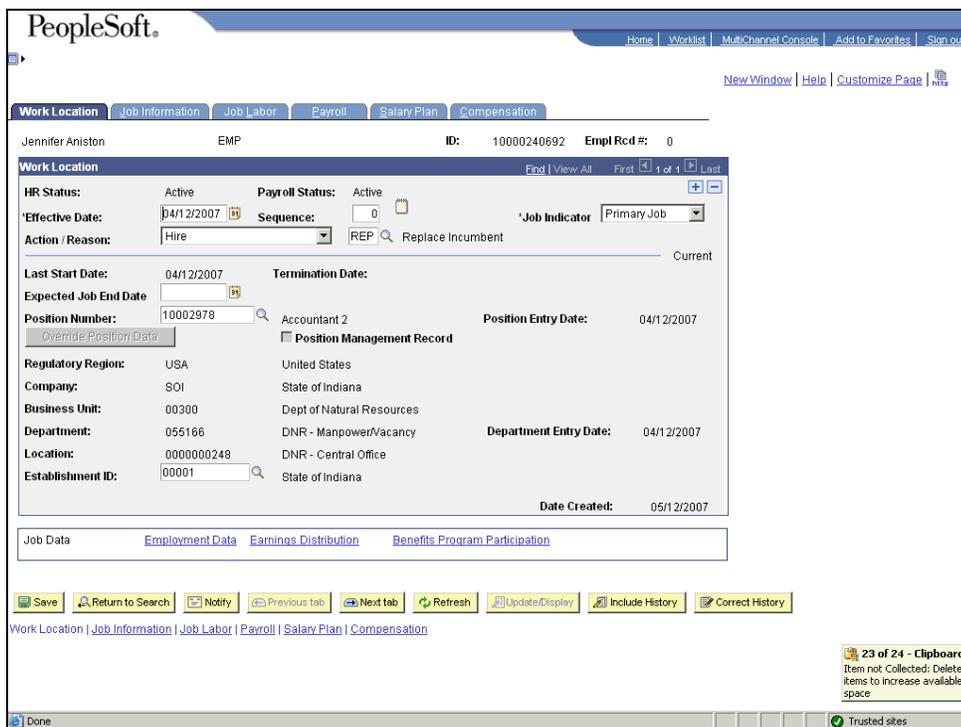
Step	Action
26.	Click the <b>Save</b> button. 
27.	<b>End of Procedure.</b>

## Leaves of Absence

### Entering a Paid Leave of Absence

#### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the <b>EmplID</b> field. Enter " <b>1000240692</b> ".
4.	Click the <b>Search</b> button. 



The screenshot shows the PeopleSoft Workforce Administration interface. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main content area is titled "Work Location" and displays details for employee Jennifer Aniston (EMP ID: 1000240692, Empl Rcd #: 0). The "Job Data" tab is active, showing fields for HR Status (Active), Payroll Status (Active), Effective Date (04/12/2007), Sequence (0), and Job Indicator (Primary Job). Below these are fields for Last Start Date, Termination Date, Expected Job End Date, Position Number (10002978), and Position Entry Date (04/12/2007). The interface also displays organizational information such as Regulatory Region (USA), Company (SOI), Business Unit (00300), Department (055166), and Location (000000248). A "Date Created" field shows 05/12/2007. At the bottom, there are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A status bar at the very bottom indicates "23 of 24 - Clipboard" and "Trusted sites".

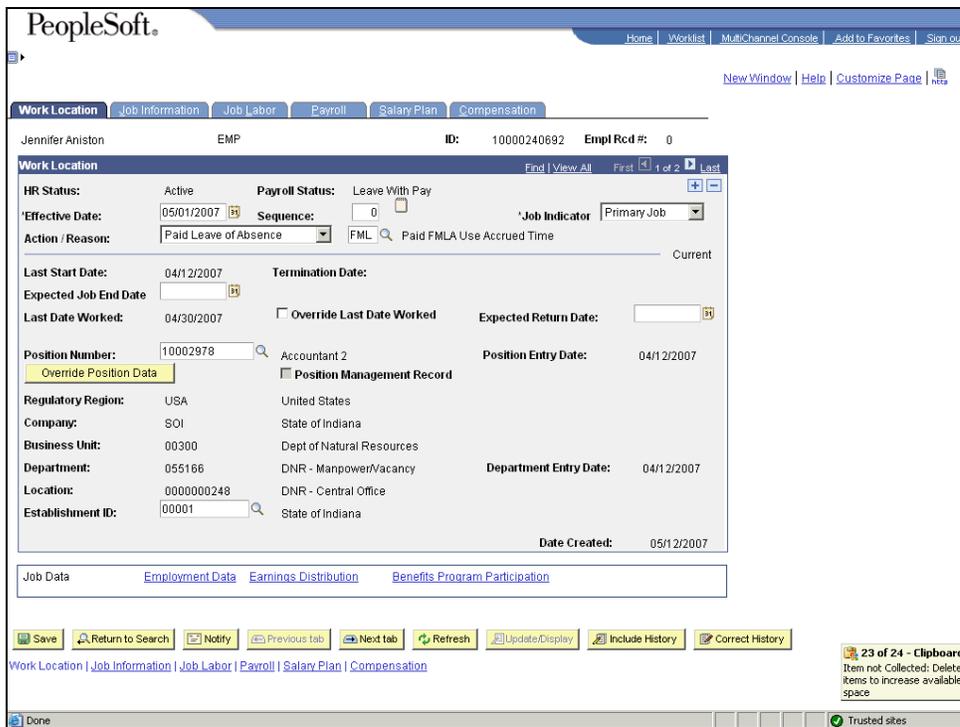
Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field. Enter " <b>050107</b> ".

Last changed on: 6/26/2007 11:21 AM

# Training Guide

## Workforce Administration for Quasi Agencies v8.9

Step	Action
7.	Click the <b>Employee Status</b> list. 
8.	Select <b>Paid Leave of Absence</b> from the <b>Action</b> list. 
9.	Click the <b>Look up (Alt+5)</b> button. 
10.	Select the appropriate reason code. 

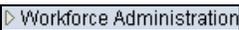
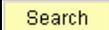


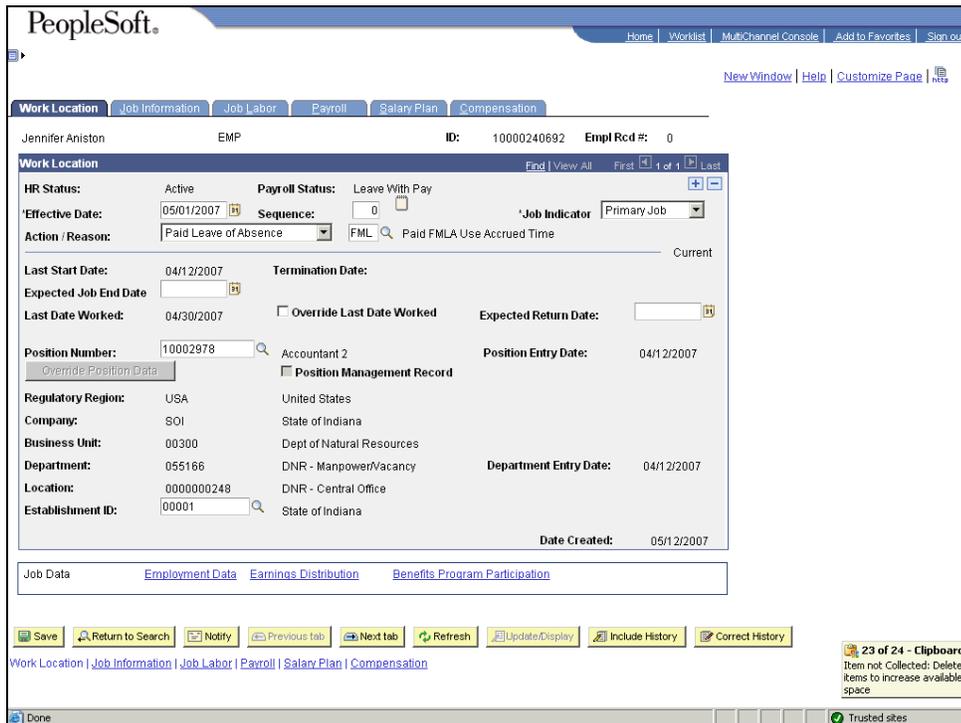
Step	Action
11.	Click the <b>Save</b> button.  After saving, ensure that the last date worked field reflects the last day the employee worked. If the date is incorrect, check the <b>Override Last Date Worked</b> checkbox and enter the correct date. Be sure to <b>save</b> again. 
12.	<b>End of Procedure.</b>

Last changed on: 6/26/2007 11:21:00 AM

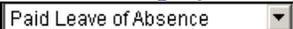
## Entering a Return from Leave of Absence

### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id into the field.
4.	Click the <b>Search</b> button. 



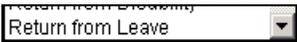
The screenshot shows the PeopleSoft Workforce Administration interface. The 'Job Data' tab is active, displaying details for employee Jennifer Aniston (EMP ID: 1000240692). The 'Action / Reason' dropdown menu is open, showing 'Paid Leave of Absence' as the selected option. Other visible fields include 'Effective Date' (05/01/2007), 'Position Number' (10002978), and 'Last Start Date' (04/12/2007).

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Click the <b>Employee Status</b> list. 

Last changed on: 6/26/2007 11:21 AM

# Training Guide

## Workforce Administration for Quasi Agencies v8.9

Step	Action
8.	Select <b>Return from Leave</b> from the Action list. 
9.	Click the <b>Look up (Alt+5)</b> button. 
10.	Select the appropriate reason code from the list. 



PeopleSoft. Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | 

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Jennifer Aniston EMP ID: 10000240692 Empl Rcd #: 0

Work Location Find | View All First 1 of 2 Last

HR Status: Active Payroll Status: Active

Effective Date: 05/15/2007 Sequence: 0 Job Indicator: Primary Job

Action / Reason: Return from Leave RPL Return from Paid Leave

Last Start Date: 04/12/2007 Termination Date: Future

Expected Job End Date

Position Number: 10002978 Accountant 2 Position Entry Date: 04/12/2007

Override Position Data  Position Management Record

Regulatory Region: USA United States

Company: SOI State of Indiana

Business Unit: 00300 Dept of Natural Resources

Department: 055166 DNR - Manpower/Vacancy Department Entry Date: 04/12/2007

Location: 000000248 DNR - Central Office

Establishment ID: 00001 State of Indiana

Date Created: 05/12/2007

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

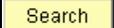
23 of 24 - Clipboard  
Item not Collected: Delete items to increase available space

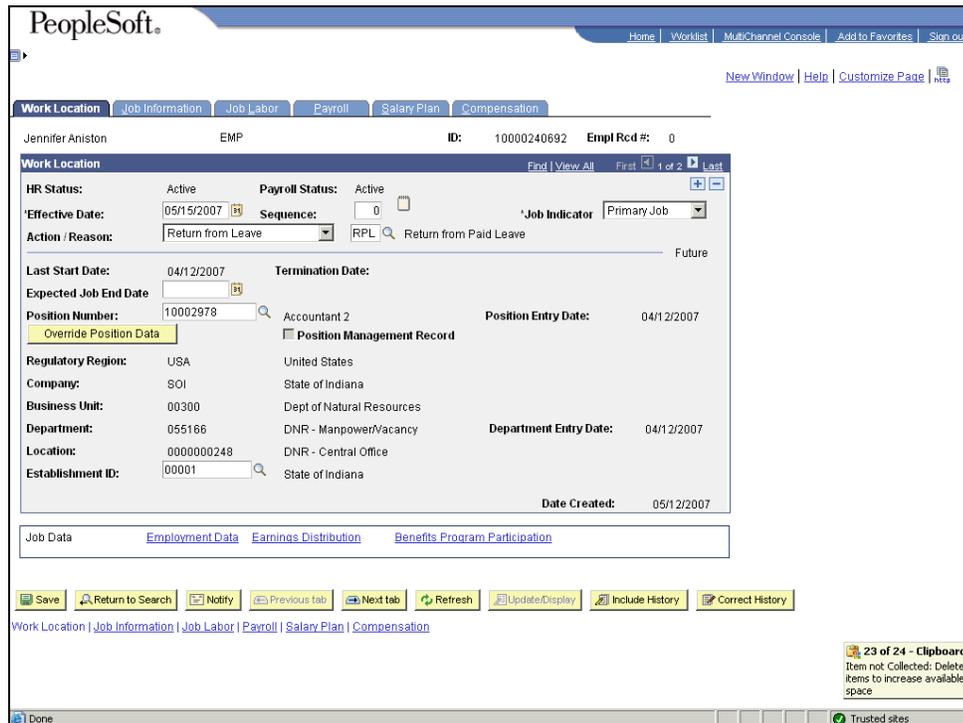
Done Trusted sites

Step	Action
11.	Click the <b>Save</b> button. 
12.	<b>End of Procedure.</b>

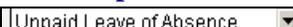
## Entering a Non-Paid Leave of Absence

### Procedure

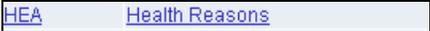
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the <b>EmplID</b> field.
4.	Click the <b>Search</b> button. 



The screenshot shows the PeopleSoft Workforce Administration interface. The user is logged in as Jennifer Aniston (EMP ID: 10000240692). The 'Job Data' tab is selected, displaying details for a job position. The 'Action/Reason' dropdown is set to 'Return from Leave' (RPL). The 'Effective Date' is 05/15/2007. The 'Position Number' is 10002978. The 'Department' is DNR - Manpower/Vacancy. The 'Location' is DNR - Central Office. The 'Establishment ID' is 00001. The 'Date Created' is 05/12/2007. A 'Search' button is highlighted in yellow.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Select <b>Unpaid Leave of Absence</b> from the list. 

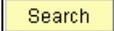
Last changed on: 6/26/2007 11:21 AM

Step	Action
8.	Click the <b>Look up (Alt+5)</b> button. 
9.	Select the appropriate reason code from the list. 
10.	Click the <b>Save</b> button. 
11.	<b>End of Procedure.</b>

## Disability

### Short Term Disability with Pay

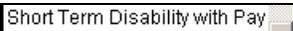
#### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id into the field.
4.	Click the <b>Search</b> button. 

The screenshot shows the PeopleSoft Work Location form for Jennifer Aniston. The form is titled "Work Location" and includes a navigation bar with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The employee's name is Jennifer Aniston, EMP, with ID 10000240692 and Empl Rcd #: 0. The form displays the following information:

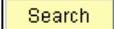
- HR Status:** Active
- Payroll Status:** Leave of Absence
- Effective Date:** 05/30/2007
- Sequence:** 0
- Action / Reason:** Unpaid Leave of Absence
- Job Indicator:** Primary Job
- Position Number:** 10002978 (Accountant 2)
- Position Entry Date:** 04/12/2007
- Department:** DNR - Manpower/Vacancy
- Department Entry Date:** 04/12/2007
- Location:** DNR - Central Office
- Establishment ID:** 00001 (State of Indiana)
- Date Created:** 05/12/2007

At the bottom of the form, there are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A status bar at the bottom right indicates "23 of 24 - Clipboard" and "Item not Collected: Delete items to increase available space".

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Select <b>Short Term Disability</b> with Pay from the <b>Action</b> list. 
8.	Enter the appropriate reason code into the <b>Reason</b> field.
9.	Click the <b>Save</b> button. 
10.	<b>End of Procedure.</b>

## Long Term Disability with Pay

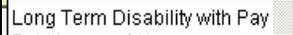
### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id into the field.
4.	Click the <b>Search</b> button. 

The screenshot shows the PeopleSoft Workforce Administration interface. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main content area is titled "Jennifer Aniston EMP ID: 10000240692 Empl Rcd #: 0". Below this, there are tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The "Job Data" tab is active, showing a table with one row of data. The table columns include HR Status (Active), Payroll Status (Leave With Pay), Effective Date (05/31/2007), Sequence (0), Job Indicator (Primary Job), Action / Reason (Short Term Disability with Pay), and Termination Date (Future). Below the table, there are fields for Last Start Date (04/12/2007), Expected Job End Date, Last Date Worked (05/29/2007), and Expected Return Date. The Position Number field is set to 10002978, with a search icon and the text "Accountant 2". Other fields include Regulatory Region (USA), Company (SOI), Business Unit (00300), Department (055166), Location (0000000248), and Establishment ID (00001). The Date Created field is 05/12/2007. At the bottom, there are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A clipboard notification is visible in the bottom right corner.

Step	Action
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.

Last changed on: 6/26/2007 11:21:00 AM

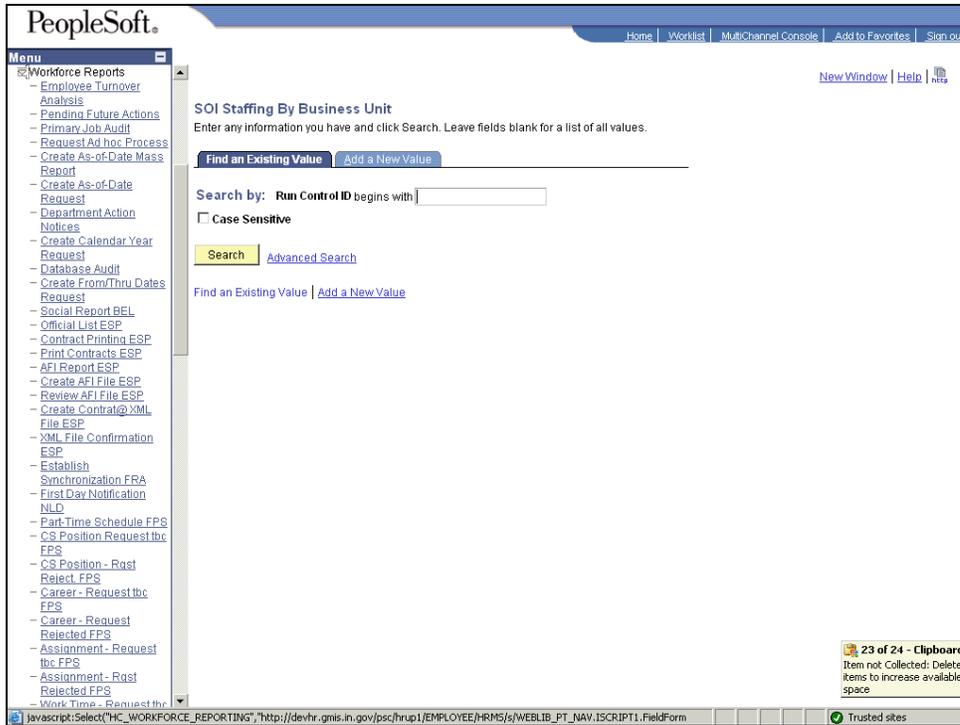
Step	Action
7.	Click the <b>Employee Status</b> list. 
8.	Select <b>Long Term Disability</b> with Pay from the <b>Action</b> list. 
9.	Enter the appropriate reason code into the <b>Reason</b> field.
10.	Click the <b>Save</b> button. 
11.	<b>End of Procedure.</b>

## Workforce Reports

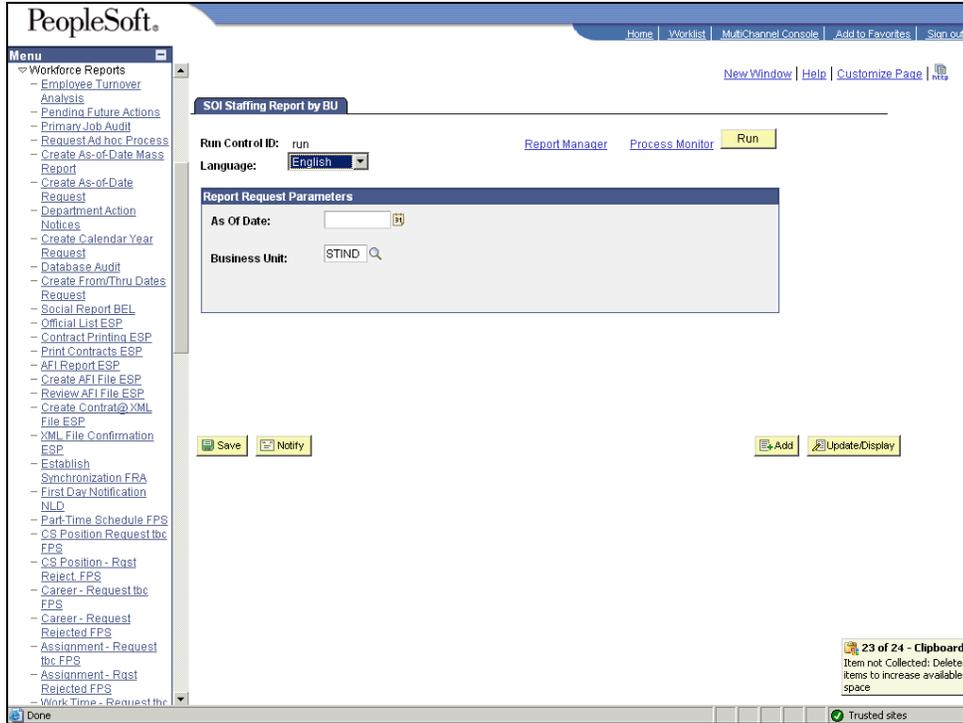
### Staffing Report by BU

#### Procedure

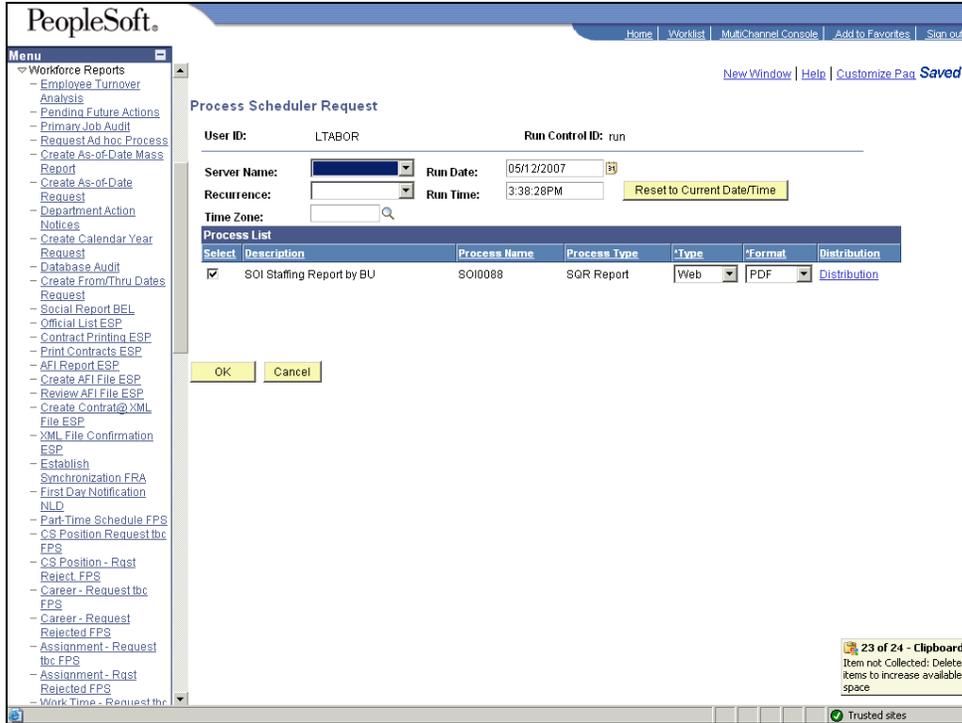
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Workforce Reports</b> button. 
3.	Scroll to the bottom of the page.
4.	Click the <b>Staffing report by BU</b> button. 



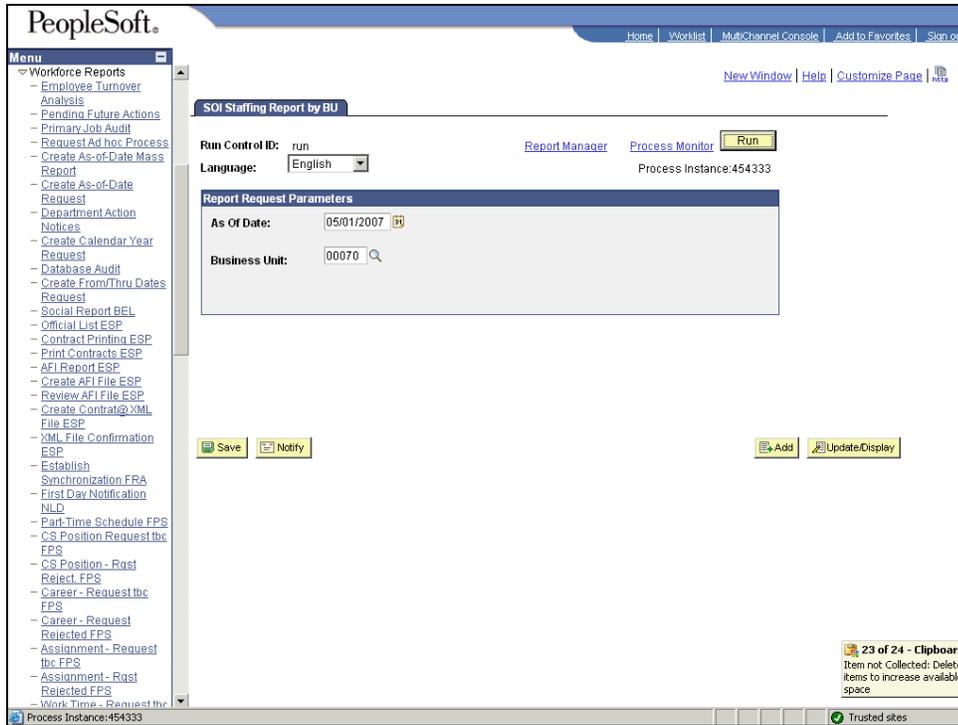
Step	Action
5.	If you have previously run this report, enter the Run Control ID into the search field.
6.	If you do not have an established Run Control ID, click the <b>Add a New Value</b> tab. 
7.	Enter the desired value into the <b>search</b> field.
8.	Click the <b>Search (Alt+1)</b> button. 



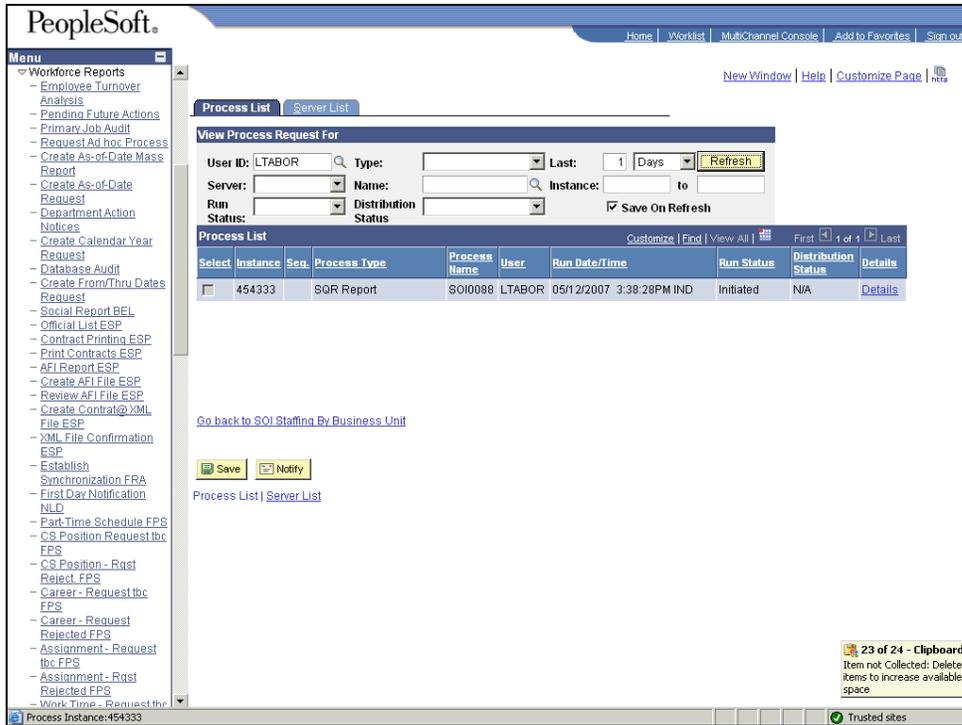
Step	Action
9.	Enter the desired information into the <b>As Of Date</b> field. Enter " <b>050107</b> ".
10.	Enter the desired information into the <b>Business Unit</b> field. Enter " <b>00070</b> ".
11.	Click the <b>Run</b> button. 



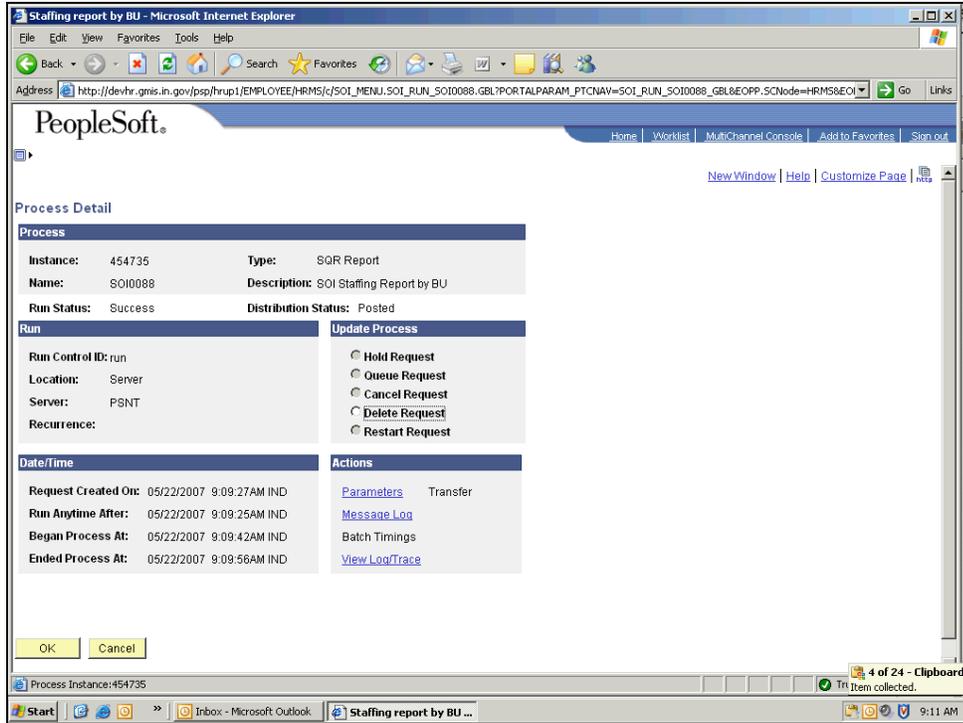
Step	Action
12.	Click the <b>Ok (Enter)</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">OK</div>



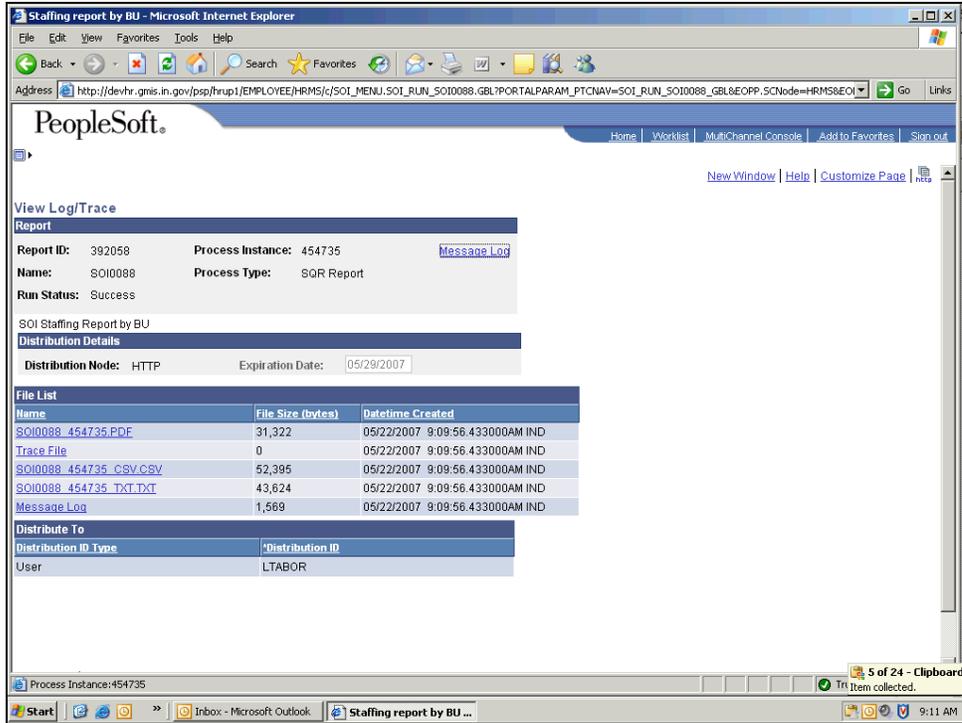
Step	Action
13.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>



Step	Action
14.	Click the <b>Refresh</b> button until the run status is success and the distribution status is posted. . 
15.	Click the <b>Details</b> link. 



Step	Action
16.	Click the <b>View Log/Trace</b> link. <a href="#">View Log/Trace</a>



Step	Action
17.	Click the PDF <b>URL</b> link. <a href="#">SOI0088_454735.PDF</a>

The screenshot shows a Microsoft Internet Explorer browser window displaying a PDF report. The address bar shows the URL: [http://devhr.gmis.in.gov/pdreports/hrup1/392058/SOI0088\\_454735.PDF](http://devhr.gmis.in.gov/pdreports/hrup1/392058/SOI0088_454735.PDF). The report content is as follows:

REQ NO	CODE	JOB TITLE	MINOR	T	S	C	FAMILY	EMPLOYEE NAME	EMP	BI	JOB	WEEKS/SEMI	ANNUAL	C	B	SERVISE	LOC	B	CRSD	J
DEPARTMENT: 045001 EDC - Office of The Director																				
10023761	00000	Special Band	1000-100700	C	A	R	EMPH	Debra Hixson	00000	1,511.00	32,000.00	WHITE	#	2005-02-15	0000000970	A	2005-02-15	W	00	P
10023762	00000	Special Band	1000-100700	C	A	R	EMPH	John Bergendoff	00000	2,040.00	74,510.00	WHITE	#	2005-03-07	0000000970	A	2005-03-07	W	00	M
10023763	00000	Accountant	1000-100700	C	A	R	EMPH	Brian Bewley	00000	1,354.00	30,000.00	WHITE	#	1977-05-02	0000000970	A	1977-05-02	W	00	M
10023767	00000	Administrative	1000-100700	C	A	R	EMPH	Diana Smith	00000	1,174.00	24,400.00	WHITE	#	1975-07-20	0000000970	A	1975-07-20	W	00	P
10020074	00000	Special Band	1000-100700	C	A	R	EMPH	Daniel MacLver	00000	2,040.00	74,510.00	WHITE	#	2005-10-15	0000000970	A	2005-10-15	W	00	M
DEPARTMENT TOTALS																				
										EMPLOYEES TOTALS	5	GR LEAVE:		TOTAL SALARY:						
										FULL-TIME:	5	INTERMITTENT:		BI-WEEKLY SALARY:						
										PART-TIME:		TEMPORARY:		TOTAL:						
DEPARTMENT: 045002 EDC - Administrative Div																				
10023765	00000	Special Band	1000-100700	C	A	R	EMPH	Tracy Foutner	00000	2,447.75	69,341.00	WHITE	#	1993-04-11	0000000970	A	1993-04-11	W	00	P
10023763	00000	Program Sv	1000-100700	C	A	R	EMPH	Allen Aikman	00000	1,097.10	15,475.10	WHITE	#	1984-03-24	0000000970	A	1984-03-24	W	00	M
10023761	00000	Accountant	1000-100700	C	A	R	EMPH	Shelton Williamson	00000	1,175.10	15,401.10	WHITE	#	1993-04-12	0000000970	A	1993-04-12	W	00	P
10023761	00000	Accountant	1000-100700	C	A	R	EMPH	Roberta Davis	00000	1,130.14	15,409.14	BLACK	#	1983-11-14	0000000970	A	1983-11-14	W	00	P
10023761	00000	Accountant	1000-100700	C	A	R	EMPH	Ron Alcorn	00000	1,130.00	20,370.00	BLACK	#	2004-04-15	0000000970	A	2004-04-15	W	00	M
DEPARTMENT TOTALS																				
										EMPLOYEES TOTALS	5	GR LEAVE:		TOTAL SALARY:						
										FULL-TIME:	5	INTERMITTENT:		BI-WEEKLY SALARY:						
										PART-TIME:		TEMPORARY:		TOTAL:						
DEPARTMENT: 045004 EDC - Employment Admin Div																				
10023761	00000	Special Band	1000-100700	C	A	R	EMPH	Michelle Pullerton	00000	2,447.75	69,341.00	WHITE	#	2005-02-15	0000000970	A	2005-02-15	W	00	P
10023761	00000	Human Res	1000-100700	C	A	R	EMPH	Michelle Pullerton	00000	2,447.75	69,341.00	WHITE	#	2005-02-15	0000000970	A	2005-02-15	W	00	P
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Jeffrey Hilliker	00000	947.00	20,205.00	WHITE	#	1980-12-18	0000000970	A	1980-12-18	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Jeffrey Hilliker	00000	947.00	20,205.00	WHITE	#	1980-12-18	0000000970	A	1980-12-18	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	00	M
10023761	00000	Secretary	1000-100700	C	A	R	EMPH	Johnny Jungler	00000	770.00	20,200.00	WHITE	#	2007-03-01	0000000970	A	2007-03-01	W	0	

### Job Code

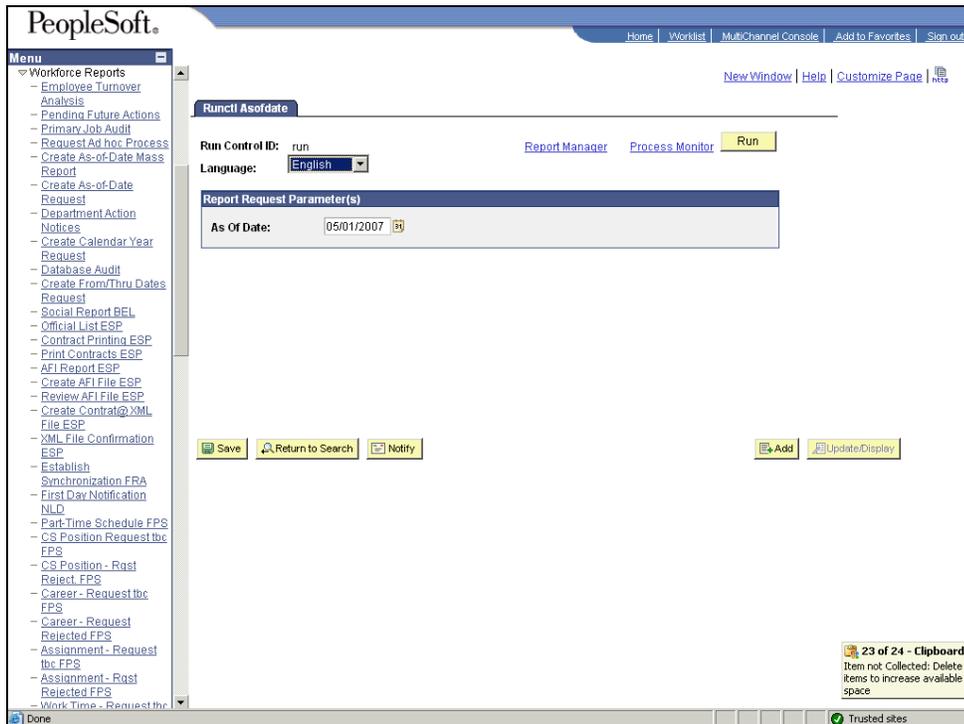
### Procedure

Step	Action
1.	Click the <b>Workforce Administration</b> link.

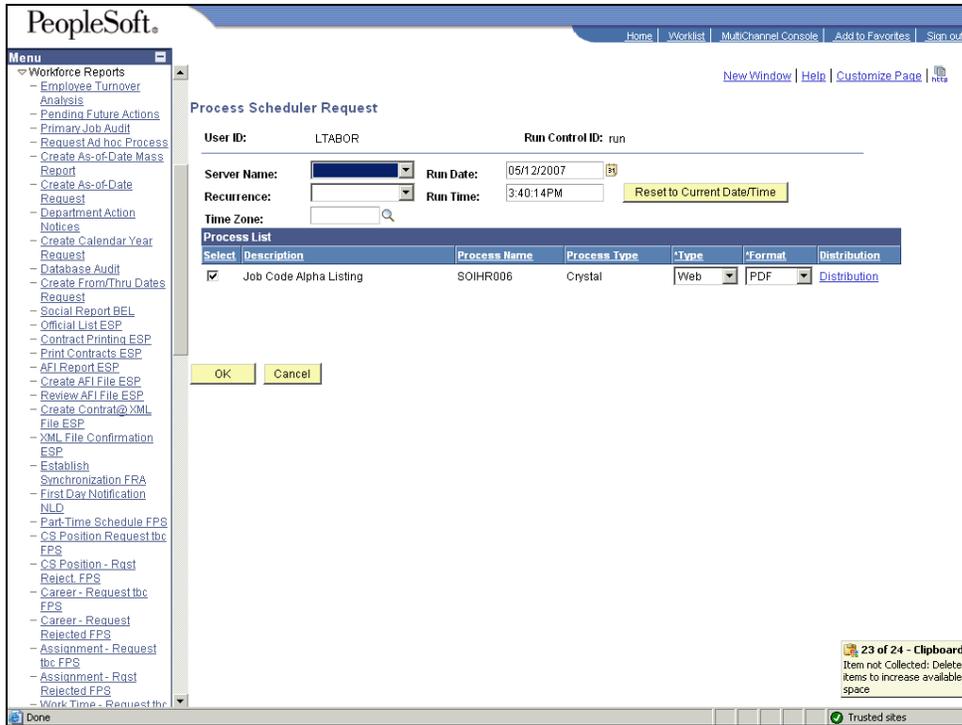


Step	Action
2.	Click the <b>Workforce Reports</b> button. 
3.	Release the mouse button.
4.	Click the <b>Job Code Listing - Alpha</b> button. 

Step	Action
5.	Enter the desired information into the <b>Workforce Reports</b> field. Enter " <b>run</b> ".
6.	Click the <b>Search</b> button. 



Step	Action
7.	Click the <b>Run</b> button. 



Step	Action
8.	Click the <b>OK</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">OK</div>



Step	Action
9.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>

The screenshot shows the PeopleSoft Workforce Administration interface. On the left is a menu with various reports and actions. The main area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' section with search criteria for User ID (LTABOR), Type, Last (1 Days), and a 'Refresh' button. Below this is a 'Process List' table with the following data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	454334		Crystal	SOIHR006	LTABOR	05/12/2007 3:40:14PM IND	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	454333		SQR Report	SOI0088	LTABOR	05/12/2007 3:38:28PM IND	Success	Posted	<a href="#">Details</a>

At the bottom right, there is a clipboard notification: '23 of 24 - Clipboard Item not Collected; Delete items to increase available space'. The status bar at the very bottom shows 'Process Instance: 454334' and 'Trusted sites'.

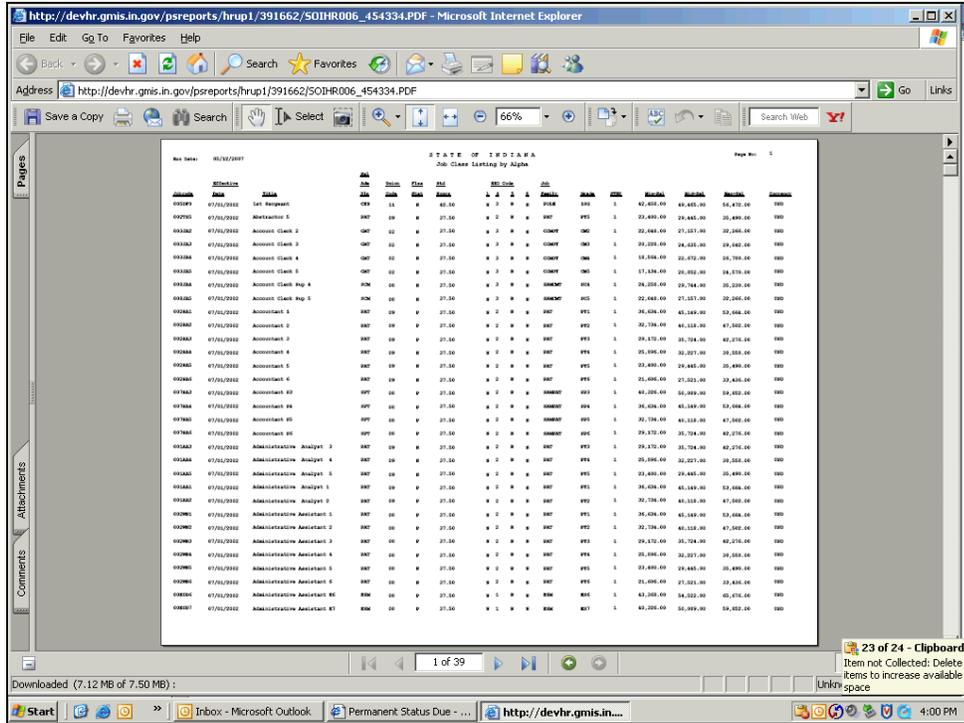
Step	Action
10.	Click the <b>Refresh</b> button. 
11.	Click the <b>Process Detail</b> link.

The screenshot shows the PeopleSoft Workforce Reports interface. On the left is a menu with various report options. The main area displays 'Process Detail' for instance 454334. The process is named 'SOIHR006' and is described as 'Job Code Alpha Listing'. It has a status of 'Success' and is 'Posted'. The interface includes sections for 'Run' (with fields for Run Control ID, Location, Server, and Recurrence), 'Update Process' (with radio buttons for Hold, Queue, Cancel, Delete, and Restart requests), and 'Date/Time' (with fields for Request Created On, Run Anytime After, Began Process At, and Ended Process At). There are also 'Actions' links for Parameters, Message Log, Batch Timings, and View Log/Trace. At the bottom, there are 'OK' and 'Cancel' buttons. A system tray notification indicates '23 of 24 - Clipboard' items not collected.

Step	Action
12.	Click the <b>View Log/Trace</b> link. <a href="#">View Log/Trace</a>

The screenshot shows the PeopleSoft interface with a menu on the left and a main content area. The menu includes 'Workforce Reports' and various sub-items like 'Employee Turnover Analysis', 'Request Ad hoc Process Report', etc. The main content area displays 'View Log/Trace' for a report with ID 391662 and process instance 454334. It shows the report name 'SOIHR006', process type 'Crystal', and a successful run status. Below this, there is a 'Distribution Details' section showing 'Distribution Node: HTTP' and 'Expiration Date: 05/19/2007'. A 'File List' table is present with columns for Name, File Size (bytes), and Datetime Created. The table lists three files: 'Message Log' (0 bytes), 'SOIHR006\_454334.PDF' (122,408 bytes), and 'PeopleSoft Trace File' (459 bytes). A 'Distribute To' section shows 'Distribution ID Type' as '\*Distribution ID' and 'User' as 'LTABOR'. A 'Return' button is located below the file list. A 'Clipboard' notification is visible in the bottom right corner.

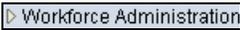
Step	Action
13.	Click the <a href="#">SOIHR006_454334.PDF</a> link. <a href="#">SOIHR006_454334.PDF</a>

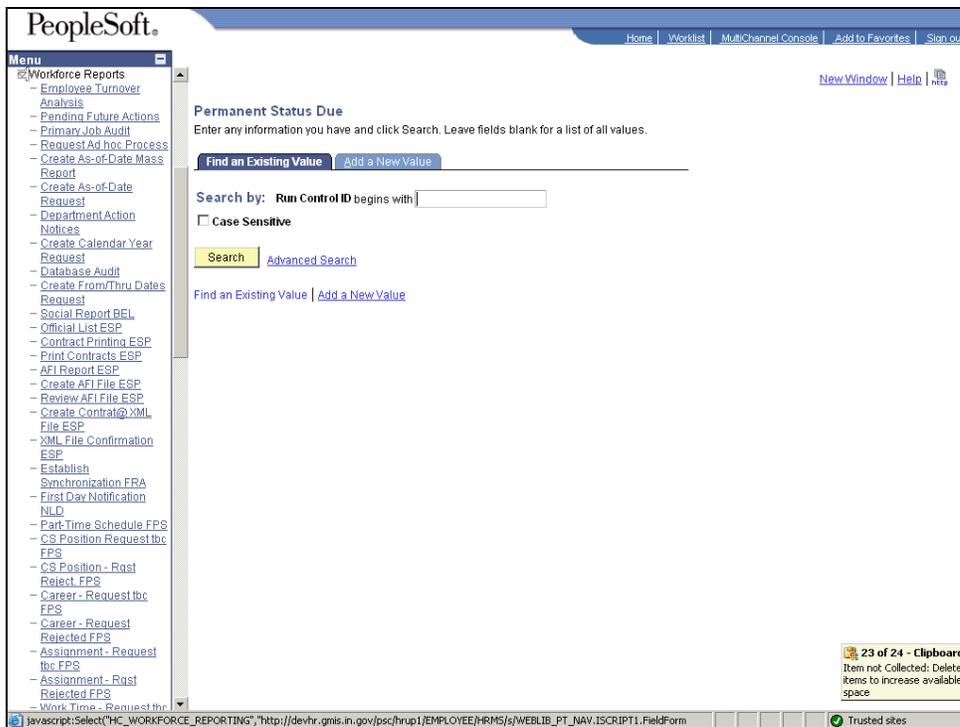


Step	Action
14.	Click the <a href="#">ABS701_93.PDF</a> object. <input type="checkbox"/>
15.	<b>End of Procedure.</b>

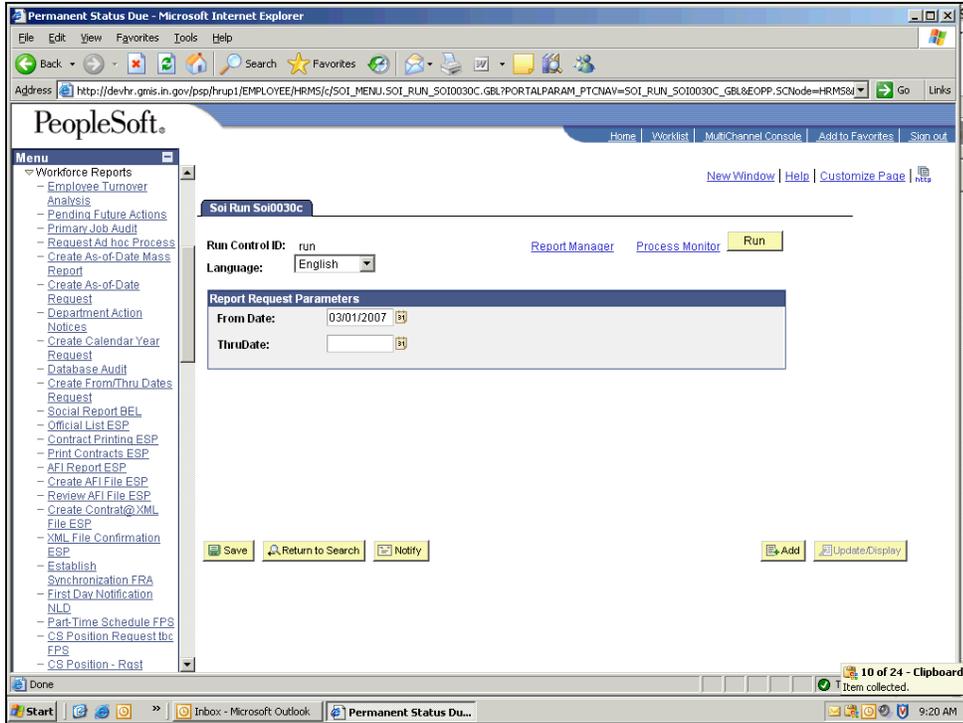
## Permanent Status Due

### Procedure

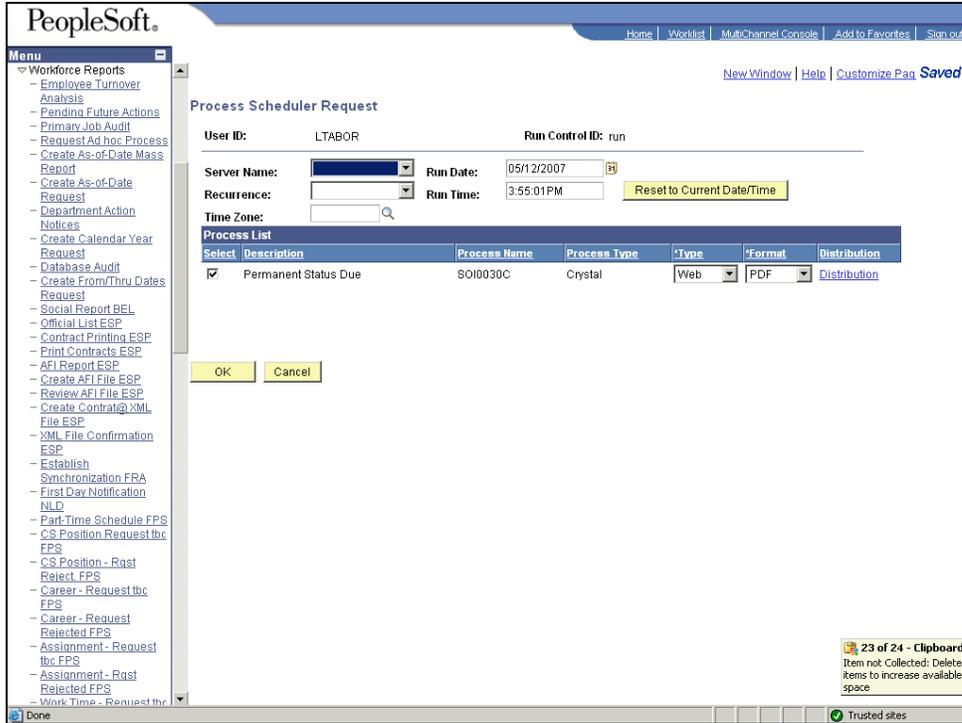
Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Workforce Reports</b> button. 
3.	Scroll to the bottom of the page.
4.	Click the <b>Permanent Status Due</b> button. 

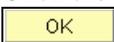


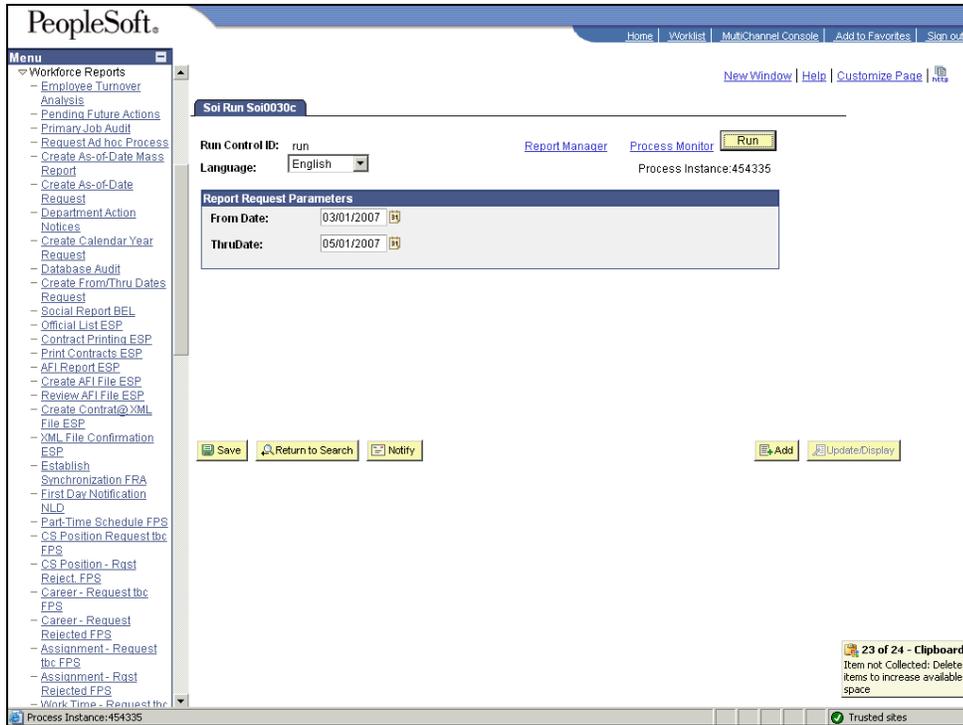
Step	Action
5.	Enter the run control id into the <b>Run Control ID</b> field.



Step	Action
6.	Enter the desired information into the <b>From Date</b> field. Enter " <b>030107</b> ".
7.	Enter the desired information into the <b>Thru Date</b> field. Enter " <b>050107</b> ".
8.	Click the <b>Run</b> button. 



Step	Action
9.	Click the <b>OK</b> button. 



Step	Action
10.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>

The screenshot shows the PeopleSoft Workforce Reports interface. The main content area displays the 'Process List' for User ID: LTABOR. The 'View Process Request For' section shows search criteria: User ID: LTABOR, Type: [dropdown], Last: 1 Days, and a Refresh button. Below this is a table of process instances:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	454335		Crystal	SOI0030C	LTABOR	05/12/2007 3:55:01 PM IND	Initiated	N/A	<a href="#">Details</a>
<input type="checkbox"/>	454334		Crystal	SOIHR006	LTABOR	05/12/2007 3:40:14 PM IND	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	454333		SQR Report	SOI0088	LTABOR	05/12/2007 3:38:28 PM IND	Success	Posted	<a href="#">Details</a>

Below the table, there are buttons for 'Save' and 'Notify', and a link to 'Go back to Permanent Status Due'. A status bar at the bottom indicates 'Process Instance: 454335' and 'Trusted sites'.

Step	Action
11.	Click the <b>Refresh</b> button. 
12.	Click the <b>Refresh</b> button. 

The screenshot shows the PeopleSoft Workforce Reports interface. On the left is a menu with various report options. The main area displays a 'Process List' table. Above the table is a 'View Process Request For' form with fields for User ID, Type, Last, Server, Name, Instance, Run, and Distribution Status. The table has the following data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	454335		Crystal	SOI0030C	LTABOR	05/12/2007 3:55:01PM IND	Initiated	N/A	<a href="#">Details</a>
<input type="checkbox"/>	454334		Crystal	SOIHR006	LTABOR	05/12/2007 3:40:14PM IND	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	454333		SQR Report	SOI0088	LTABOR	05/12/2007 3:38:28PM IND	Success	Posted	<a href="#">Details</a>

Below the table are buttons for 'Save' and 'Notify', and a link 'Go back to Permanent Status Due'. A status bar at the bottom indicates 'Process Instance: 454335' and 'Trusted sites'.

Step	Action
13.	Click the <b>Details</b> link. <a href="#">Details</a>

The screenshot shows the PeopleSoft Workforce Reports interface. The left-hand menu lists various report types under 'Workforce Reports'. The main content area displays 'Process Detail' for instance 454335. The process is named 'SOI0030C' with a description of 'Permanent Status Due'. It has a status of 'Success' and a distribution status of 'Posted'. The 'Run' section shows the process was executed on a 'Server' with server name 'PSNT'. The 'Date/Time' section provides a timeline: Request Created On (05/12/2007 3:55:12PM IND), Run Anytime After (05/12/2007 3:55:01PM IND), Began Process At (05/12/2007 3:55:45PM IND), and Ended Process At (05/12/2007 3:56:34PM IND). The 'Update Process' section includes radio buttons for 'Hold Request', 'Queue Request', 'Cancel Request', 'Delete Request', and 'Restart Request'. The 'Actions' section contains links for 'Parameters', 'Transfer', 'Message Log', 'Batch Timings', and 'View Log/Trace'. At the bottom of the main area are 'OK' and 'Cancel' buttons. A system tray notification in the bottom right corner indicates '23 of 24 - Clipboard' with a message: 'Item not Collected; Delete items to increase available space'. The status bar at the very bottom shows 'Process Instance: 454335' and 'Trusted sites'.

Step	Action
14.	Click the <b>View Log/Trace</b> link. <a href="#">View Log/Trace</a>

The screenshot shows the PeopleSoft interface for viewing a report log. The main content area displays the following information:

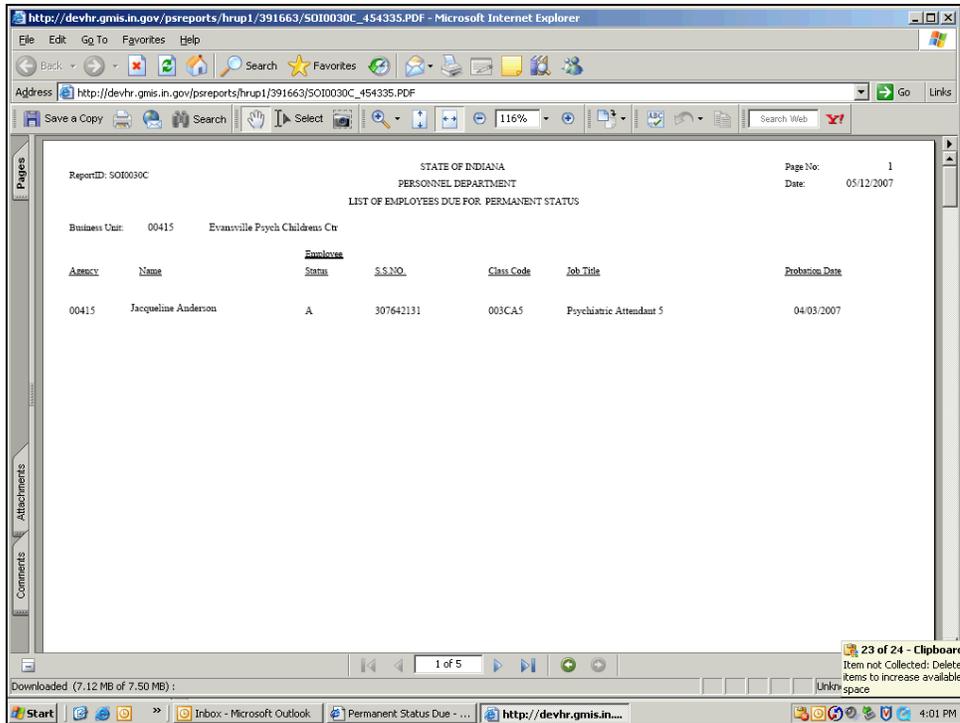
- View Log/Trace**
  - Report**
    - Report ID: 391663
    - Name: SOI0030C
    - Process Instance: 454335
    - Process Type: Crystal
    - Run Status: Success
  - Permanent Status Due**
  - Distribution Details**
    - Distribution Node: HTTP
    - Expiration Date: 05/19/2007
  - File List**

Name	File Size (bytes)	Datetime Created	
Message Log	0	05/12/2007 3:56:34.563000PM	IND
<a href="#">SOI0030C_454335.PDF</a>	37,605	05/12/2007 3:56:34.563000PM	IND
PeopleSoft Trace File	459	05/12/2007 3:56:34.563000PM	IND
  - Distribute To**

Distribution ID Type	*Distribution ID
User	LTABOR

A yellow 'Return' button is located below the file list. A clipboard notification in the bottom right corner indicates '23 of 24 - Clipboard' with a warning to delete items to increase available space.

Step	Action
15.	Click the <a href="#">SOI0030C_454335.PDF</a> link.



Step	Action
16.	The report displays as a PDF document.
17.	<b>End of Procedure.</b>

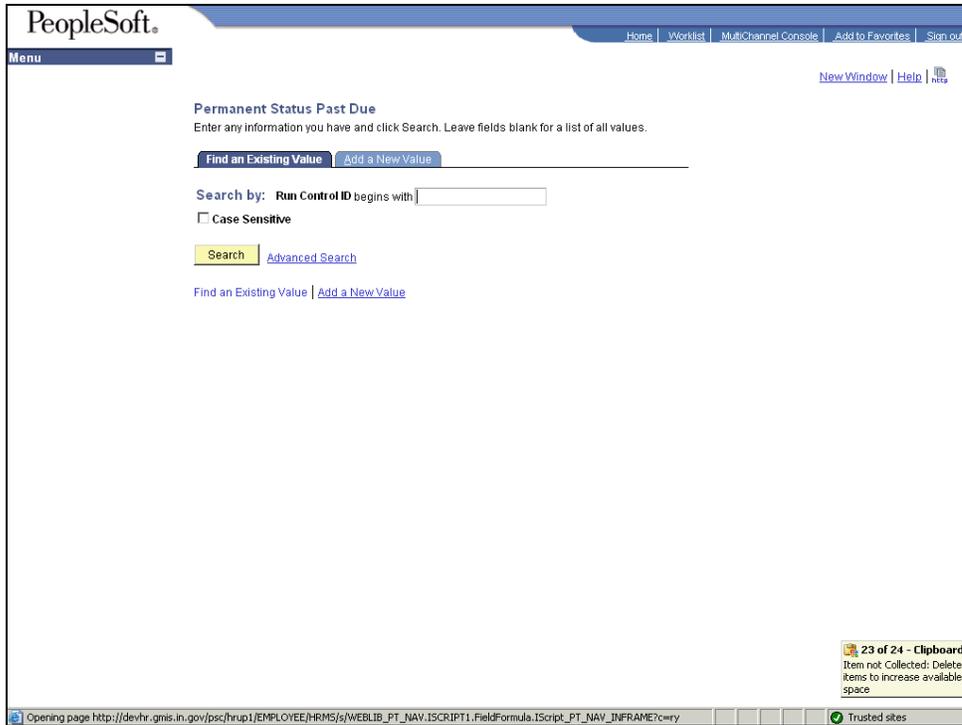
## Permanent Status Past Due

### Procedure

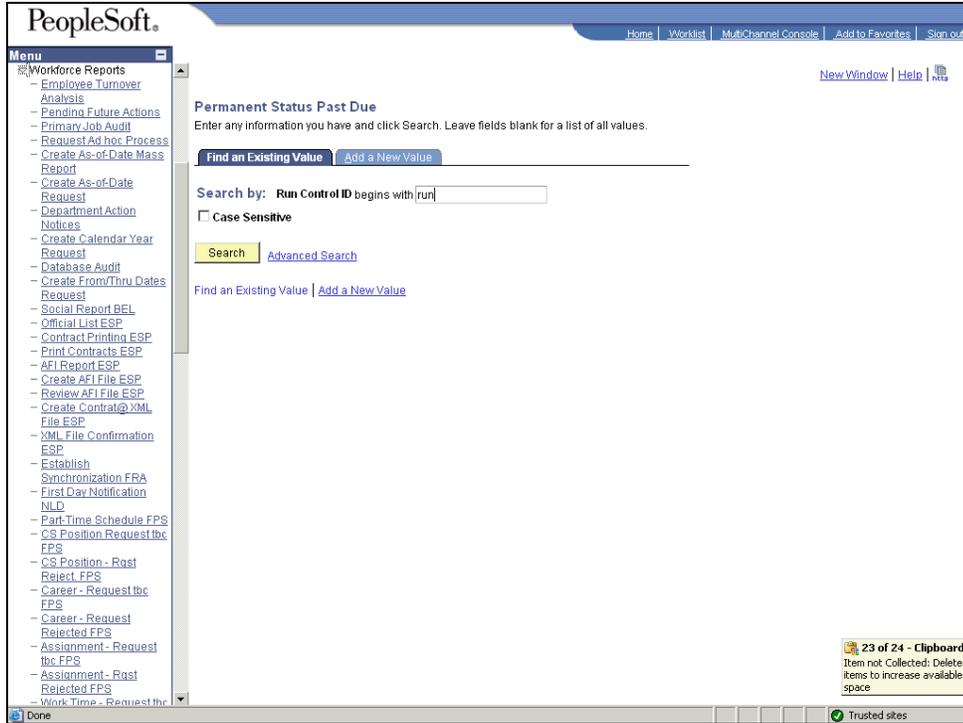
Step	Action
1.	Click the <b>Workforce Administration</b> link. 



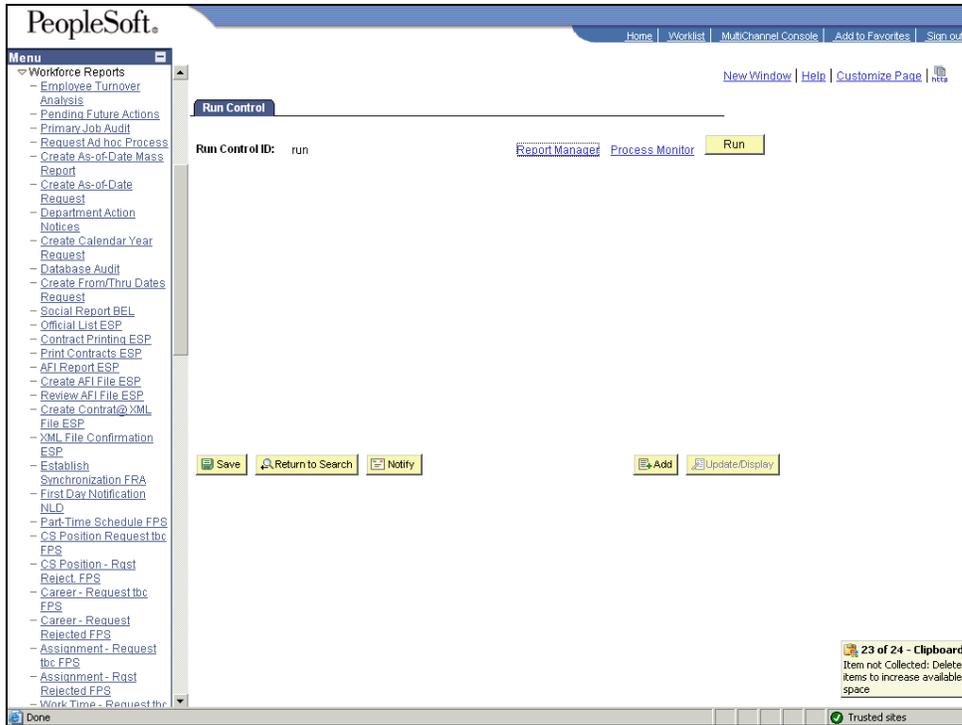
Step	Action
2.	Click the <b>Workforce Reports</b> button. 
3.	Scroll to the bottom of the page.
4.	Click the <b>Permanent Status Past Due</b> button. 

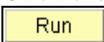


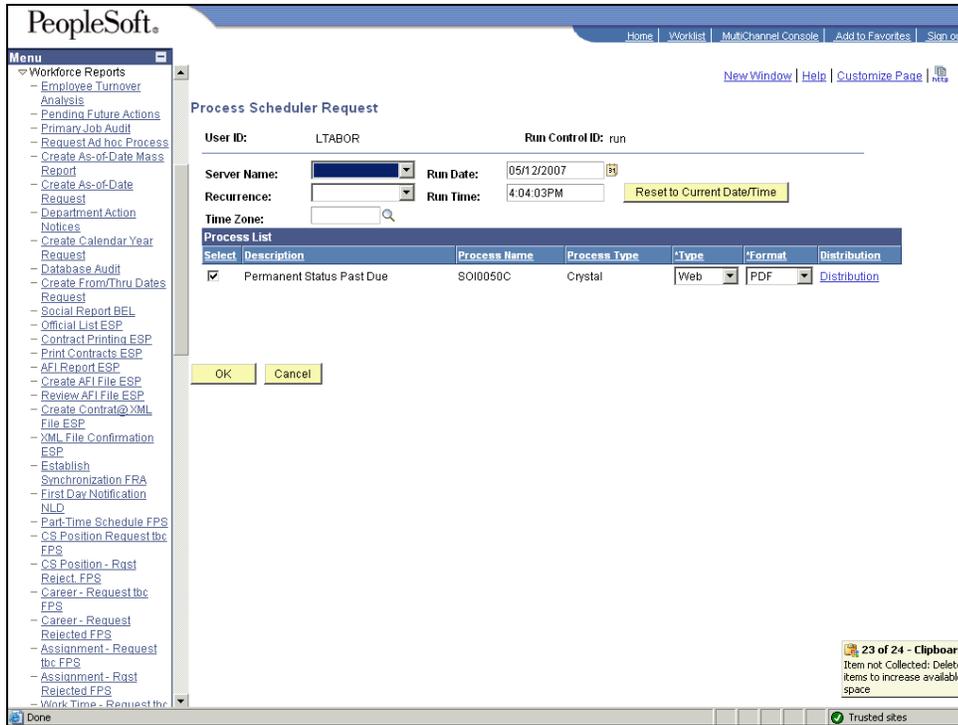
Step	Action
5.	Enter the run control id into the Run Control ID field.

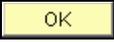


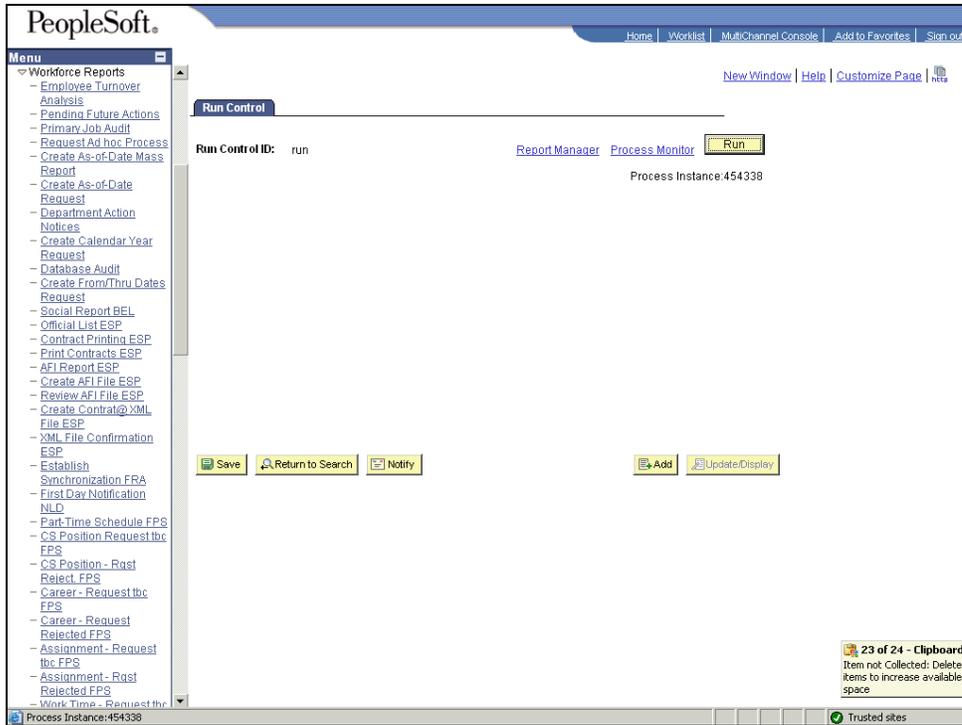
Step	Action
6.	Click the <b>Search</b> button. 



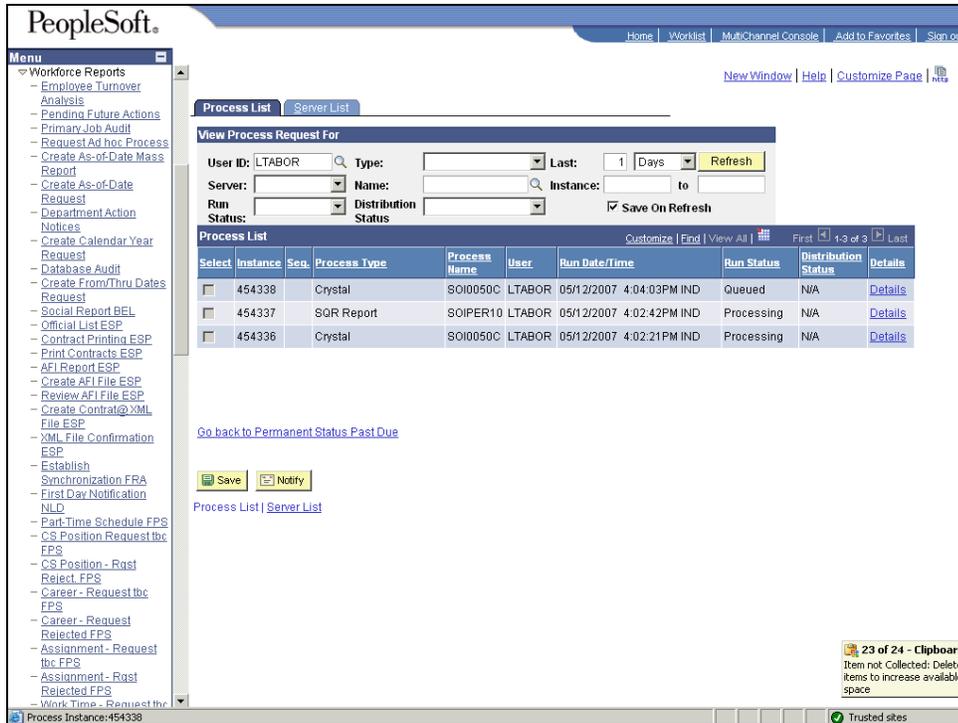
Step	Action
7.	Click the <b>Run</b> button. 



Step	Action
8.	Click the <b>OK</b> button. 



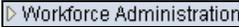
Step	Action
9.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>



Step	Action
10.	<p>Click the <b>Refresh</b> button.</p> <p>The report is accessed using the same key strokes as reviewed in previous report directions:</p> <p>Click the <b>Details</b> link.</p> <p>Click the <b>View/Log Trace</b> link.</p> <p>Click the <b>PDF hyperlink</b>.</p> <p>The report will appear as a PDF file.</p> <p></p>
11.	<b>End of Procedure.</b>

## Turn Over

## Procedure

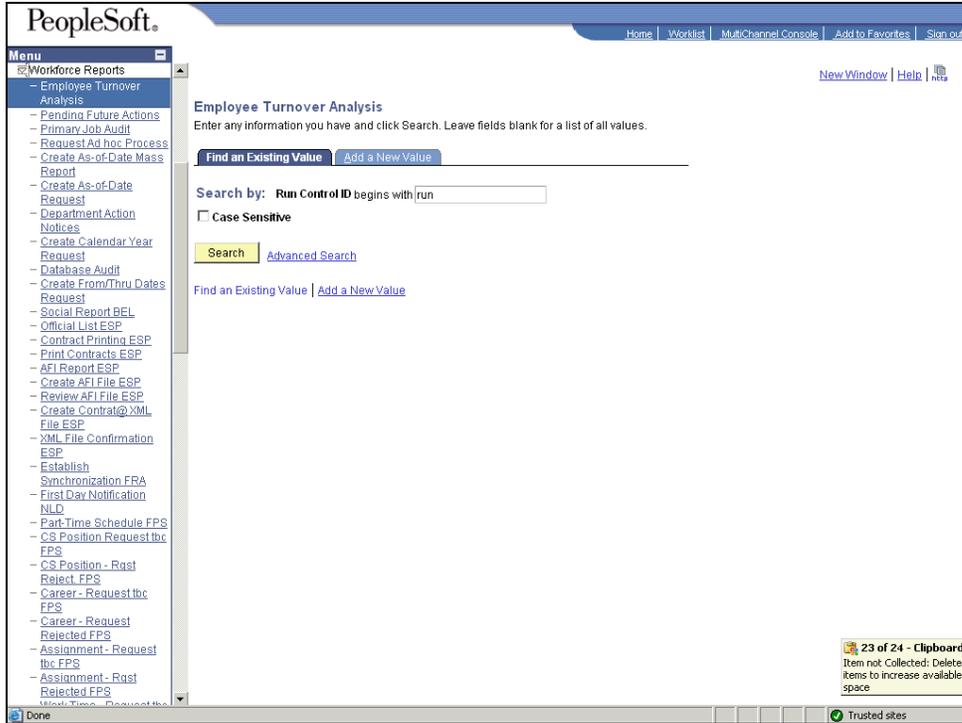
Step	Action
1.	Click the <b>Workforce Administration</b> link. 



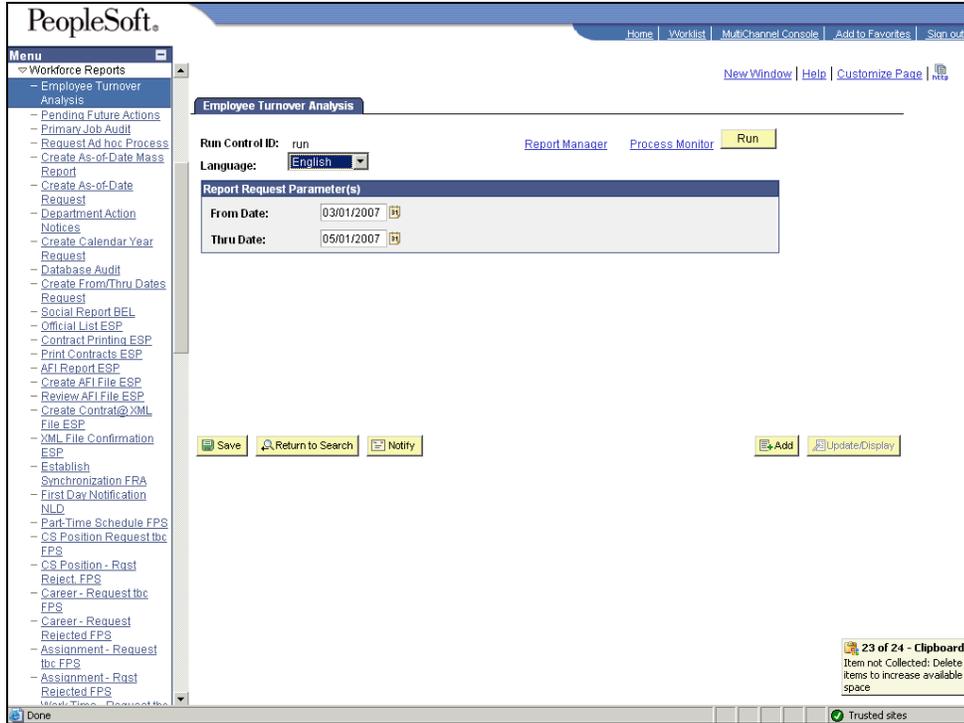
Step	Action
2.	Click the <b>Workforce Reports</b> button. 
3.	Click the <b>Employee Turnover Analysis</b> button.

The screenshot shows the PeopleSoft Workforce Reports interface. On the left is a navigation menu with categories like 'Employee Turnover Analysis', 'Pending Future Actions', 'Primary Job Audit', etc. The main content area is titled 'Employee Turnover Analysis' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search field with the label 'Search by: Run Control ID begins with' and a text input box. There are buttons for 'Find an Existing Value' and 'Add a New Value' above the search field. Below the search field are 'Search' and 'Advanced Search' buttons. A 'Case Sensitive' checkbox is also present. At the bottom right, there is a clipboard notification: '23 of 24 - Clipboard Item not Collected: Delete items to increase available space'. The browser address bar at the bottom shows a URL starting with 'http://devhr.gnis.in.gov/psc/hrup1/EMPLOYEE/HRMS/s/WEBLIB\_PT\_NAV.ISCRIPT1.FieldForm'.

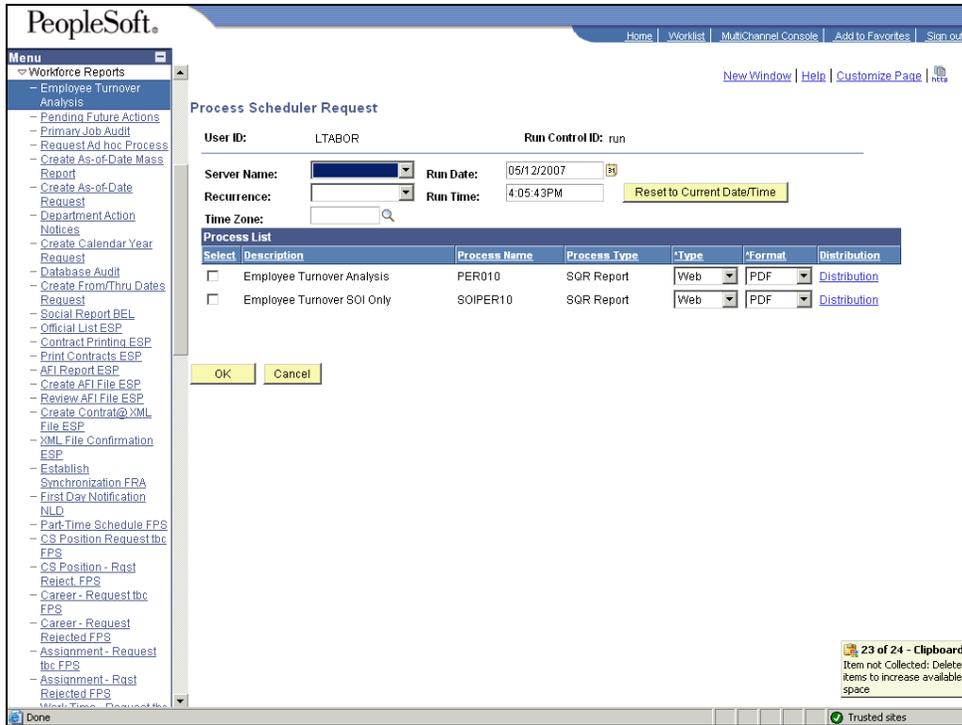
Step	Action
4.	Enter the run control id into the <b>Run Control ID</b> field.



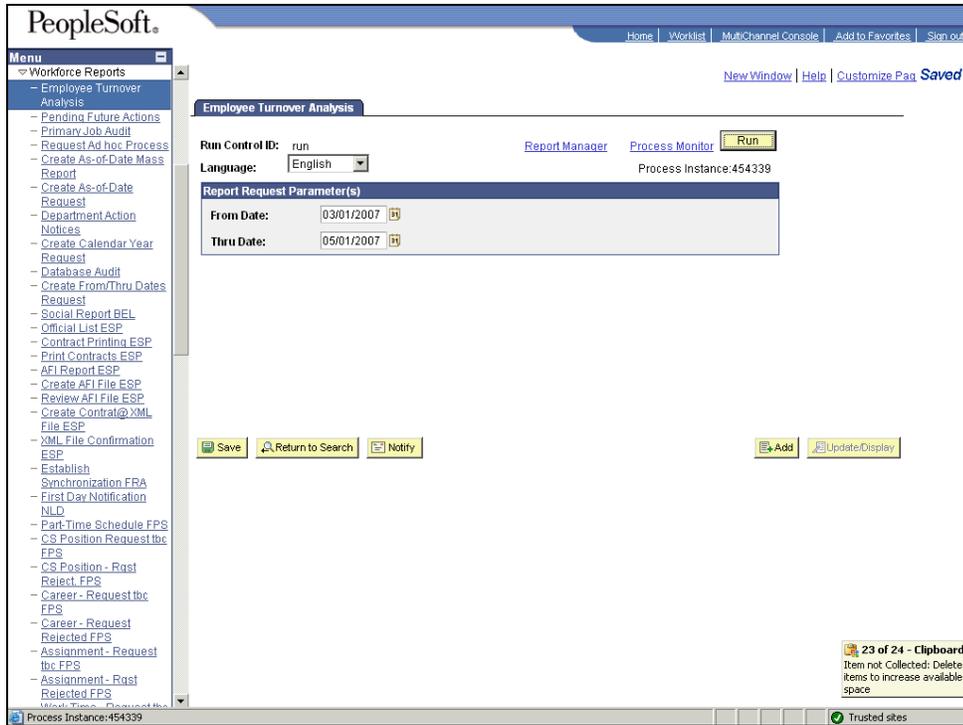
Step	Action
5.	Click the <b>Add (Alt+1)</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div>



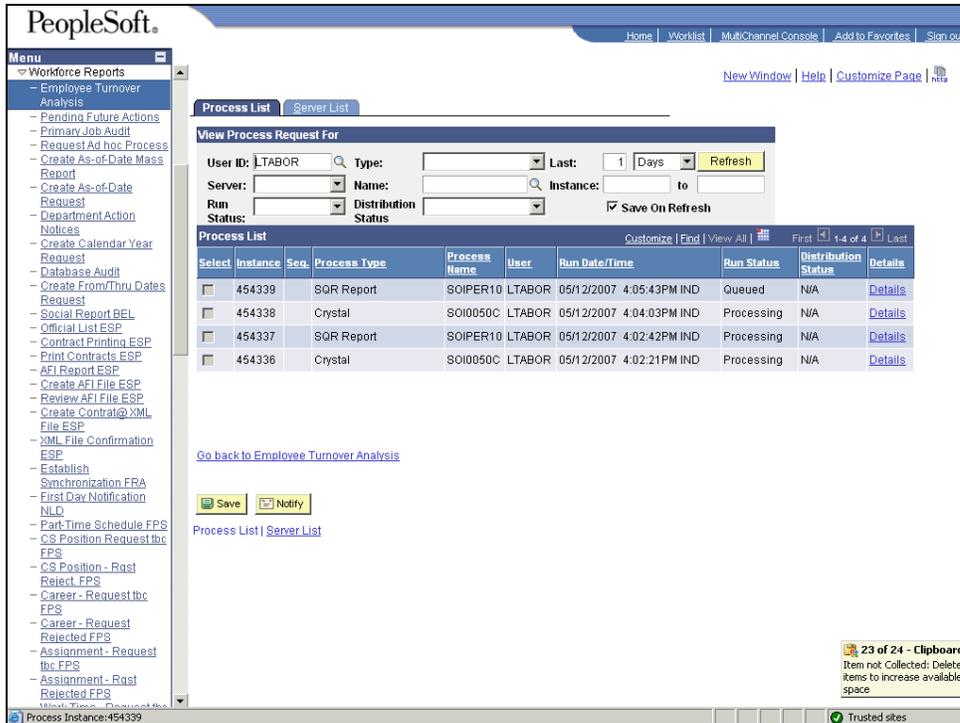
Step	Action
6.	Click the <b>Run</b> button. 



Step	Action
7.	Click the <b>Process List</b> option. <input type="checkbox"/>
8.	Click the <b>Ok (Enter)</b> button. <input type="button" value="OK"/>



Step	Action
9.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>



Step	Action
10.	Click the <b>Refresh</b> button. 
11.	Click the <b>Refresh</b> button.  The report is accessed using the same key strokes as reviewed in previous report directions:  Click the <b>Details</b> link.  Click the <b>View/Log Trace</b> link.  Click the <b>PDF hyperlink</b> .  The report will appear as a PDF file. 
12.	<b>End of Procedure.</b>

## Appendix

### Appendix A – Glossary of Workforce Administration Terms

**Accommodations** - Accommodations are efforts your organization is able to make for employees or applicants with disabilities, such as purchasing special equipment or making structural changes to a work environment.

**Action Reason** - The reason for updating data for an employee. Enter the Action Reason in two parts. Part 1 is a personnel action, including a promotion, termination, or transfer from one pay group to another. Part 2 is a reason for the action. PeopleSoft Human Resources, PeopleSoft Benefits Administration, and the COBRA Administration feature of PeopleSoft Base Benefits use the Action reason.

**Applicant Hire Process** - The procedure of hiring an applicant previously tracked and administered in the Recruitment panels. Once the system assigns an Employee ID, the system uses recruitment data to fill in the fields in the Personal Data panels.

**Benefit / Deduction Program** - Sets of benefits and deductions that are valid for an employee or group of employees. A single company may have any number of programs. An individual employee may belong to only one program; the deductions and benefits contained in the program are the only valid deductions and benefits for the employee.

Current Date - See System Date.

**Drop down Box** - A field on a panel that has a black triangle pointing downward immediately to the right of the field. This allows personnel to enter valid values for the field by clicking the triangle and choosing the correct value from the provided list, or by using the Search Option.

**Effective Date** - A method of dating information in your system. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually went into effect.

**FTE (Full Time Equivalent)** - This is the percent of a full time person the employee would normally work in this position.

**Incumbent** - An employee currently assigned to a position.

**Job Posting ID** - The numeric designation of the year and week in which the Job is opened and posted. The year is two digits. The week is also digits.

**Example: Job Requisition has a Date Opened of July 13, 1998. That date is in**

the 29<sup>th</sup> week of 1998. The Job Posting ID is 9829. Job Requisition has a Date Opened of February 22, 1999. This date is in the eighth week of 1999. Therefore, the Job Posting ID appears as 9908.

**Name Field Format** - PeopleSoft requires a specific format when entering names into the system. It is Lastname,Firstname Middlename or Initial. There is always a comma and no space between the Last and First names. The first character of both the Last and First names, as well as the Middle Initial are upper case. All other characters are generally lower case. The system allows combines as in McGuire or McDonald.

**NOTE: Any deviation from this format will cause an error message and prohibit saving the current record until you correct the entry.**

**NOTE: Never, ever, use a period anywhere in the Name field!**

**NOTE:** Name must match Social Security Card.

**NOTE:** Type Jr (Junior), Sr (Senior), II (the Second), III (the Third), etc., in the Suffix field.

**EXAMPLES:**Smith Jr,John R or Smith Jr,John Raymond ;Smith III,John R  
**National ID Number** - Most countries use some form of number for identification purposes. For example, Canadian citizens have a Social Insurance Number, and US residents have a Social Security Number. Each type of National ID has its own unique formatting requirements.

**Pay Calendar** - Payroll processing cycle for a given pay group.

**Pay Group** - A set of employees grouped together for benefits processing.

**Percent Compensation Change** - The change entered as a percentage, usually less than 10, with two decimal positions. Enter a 3.2% increase as 3.20. Enter a 1% pay reduction as -1.

**Personnel Action** - Changes to employee data or status resulting from activities such as promotions, transfers, terminations, salary increases, or leaves of absence.

**(Tele)Phone** - Enter the ten digits as one continuous string. The system automatically formats the field when you press the tab key.

**Reason Code** - A code explaining a personnel action, such as leaves of absence, hiring, or terminations.

**Regulatory Region** - Any region (country, province or state) where there are specific laws and regulations addressed by any function in PeopleSoft.

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**Security Clearance** - Security Clearances (Classified, Secret, Top Secret) are granted to employees by government agencies. They are usually associated with jobs that bring employees into contact with classified or sensitive materials.

**Shift** - The block of hours that an employee works in a day, such as first, second, or third. Shifts may be constant, rotating, repeating, or split. Any given shift may or may not have an associated Shift Differential or Bonus

**NOTE:** The State of Indiana uses this field to show employee's status as a Working Leader.

**System Date** - The date supplied by the PC you are using.

**Translate table** - An edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. Generally, PeopleSoft maintains the Translate table.

**VETS-100 Federal Contractor Report** - This report is required of employers in the United States. It lists federal job classifications and the number of employees and new hires in the last 12 months who are special disabled military veterans or Vietnam era military veterans. It also provides totals for each job classification of both veterans and non-veterans who hold these jobs.

## Appendix B – Address Format Guide

### GENERAL RULES

Enter all data using proper upper case and lower case (e.g., “Kansas City” - not “KANSAS CITY.”) Do not use all Capital Letters. The system automatically formats any field that requires information in all capital letters (State abbreviations, table Codes, etc.)

**NOTE: NEVER USE A PERIOD OR OTHER PUNCTUATION EXCEPT HYPHENATED NAMES IN ANY FIELD!**

***NOTE: ApplicantID and EmplID - NEVER USE THE SOCIAL SECURITY NUMBER! The system will automatically assign this number.***

#### Name:

PeopleSoft format is Lastname,Firstname Middlename or Initial! Always type names with upper case for first letter of each name; lower case for all other letters. Enter Jr (Junior), Sr (Senior), II (the Second), III (The third), etc., in the suffix fields.

#### Address:

Address 1 - Enter the Street address without using periods (i.e. St - not St.)

***NOTE: Do not enter PO Box Number in the Address 1 field, except when it is the ONLY address provided.***

Address 2 - Type Post Office Boxes, Apartment Numbers, etc.

Address 3 - Type in-care-of (C/O) information

City - Type complete name of the City.

Special Exceptions: Fort is Ft Saint is St

Spell out the words New, North, South, East, and West when part of a city's name.

#### Standardized Address Formats

**NO PERIODS OR OTHER PUNCTUATION EXCEPT FOR HYPHENATED NAMES ARE TO BE USED IN THE ADDRESS.**

Street address: The proper name of the street should be spelled out, with the exception of numerical names. Abbreviate direction indicators and type of street as listed below.

Ave = Avenue

Apt = Apartment

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Blvd = Boulevard  
By =Bypass  
Cswy = Causeway  
Cir = Circle  
Cr = County Road  
Ctr = Center  
Ct =Court  
Dr = Drive  
Fl = Floor  
Hts = Heights  
Hwy = Highway  
Jct = Junction  
Ln = Lane  
PkwY = Parkway  
Pl =Place  
Plz = Plaza  
Pt = Point  
PO Box = Post Office Box  
Rd = Road  
Rt = Route  
RR = Rural Route  
Sq = Square  
SR = State Road  
St = Street  
Ste = Suite  
Ter =Terrace  
Trl = Trail

North (N), South (S), East (E), and West (W) should be abbreviated in street address only if it is indicating a direction and not a proper name.

**Appendix C – Action/Reason Code Guide**

<b>Action</b>	<b>Reason</b>	<b>Description</b>
<b>Demotion</b>		
Demotion	ADA	ADA Demotion
Demotion	DSP	Demo - Same Agcy w/Pay Change
Demotion ***	DTS ***	Demotion to Subsidiary ***
Demotion	DSW	Demo - Same Agcy w/o Pay Change
Demotion	LOF	Demotion in Lieu of Layoff
Demotion	RTS	Return to Status - Same Agency
Demotion	USP	Unsatisfactory Performance
Demotion	VOL	Voluntary Demotion
<b>Data Change</b>		
Data Chg *	CPD	Correction Personal Data
Data Chg *	CJD	Correction Job Data
Data Chg *	CPR	Correction Pay Rate
Data Chg	CWT	Completed Working Test
Data Chg	EWT	Extended Working Test
Data Chg	FTP	Full Time to Part Time
Data Chg	ITR	Intermittent/Temp to Regular
Data Chg	PTF	Part Time to Full Time
Data Chg	REL	Relocation-Benefit Change
Data Chg	RMW	Reinstatement-Whole
Data Chg	RTI	Regular to Intermittent/Temp
Data Chg Inactive 1/11/05	UNC	Union NonMerit Prob Complete
Data Chg Inactive 1/11/05	UNE	Union NonMerit Probation Exten
<b>Family Status Change</b>		
Family Chg	ACI	Acquire Dependent Effective on Event Dt
Family Chg	ACQ	Acquire Dependent
Family Chg	DEA	Death of a Dependent
Family Chg	DEI	Dependent Death Effective on Event Dt
Family Chg	DEP	Dependent Removal
Family Chg	DIV	Divorce
Family Chg	DMI	Dependent Marriage Effective on Event Dt
Family Chg	DRP	Drop Insurance
Family Chg	DVI	Divorce Effective on Event Date
Family Chg	LCC	Loss of Coverage Single to Family
Family Chg	LCI	Loss of Coverage Effective Event Dt
Family Chg	LOC	Loss of Coverage
Family Chg	MAR	Marriage of Employee
Family Chg	MED	Medicare Entitlement
Family Chg	MRI	Employee Marriage Effective on Event Dt
Family Chg	OVG	Overage Dependent
<b>Hire</b>		
Hire	ELC	Elected or Appointed
Hire	NPS	New Position
Hire	REH	Rehire
Hire	REP	Replace Incumbent

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<b>Action</b>	<b>Reason</b>	<b>Description</b>
<b>Long Term Disability</b>		
LTD w/Pay	LTD	Long Term Disability With Pay
<b>Pay Rate Change</b>		
Pay Rate Change	ADJ	Adjustment-No Job Chg
Pay Rate Change	P4P	Pay For Performance
Pay Rate Change	GSA	General Salary Adjust (04, 05, 06)
Pay Rate Change	CER	Certificate
<b>Paid Leave of Absence</b>		
Paid LOA (Leave of Absence	FML	Family Medical Using Accrued Time
Paid LOA (Leave of Absence	HEA	Health Reasons Using Accrued Time
Paid LOA (Leave of Absence)	MIL	Military Service-Up to 15 days
Paid LOA (Leave of Absence	PED	Education Using Accrued Time
Paid LOA (Leave of Absence	PML	Military Using Accrued Time
Paid LOA (Leave of Absence)	PUN	Paid Union Leave (Inactive 1/11/05)
Paid LOA (Leave of Absence)	TRT	Tortuous Act Disability
Paid LOA (Leave of Absence)	UBB	Union Buy Back (Inactive 1/11/05)
Paid LOA (Leave of Absence)	ULB	Union Leave Bank Inactive 1/11/05)
<b>Position Changes</b>		
Position	JRC	Job Reclassification
Position	STA	Position Status Change (Working Leader)
<b>Promotion – Same Agency</b>		
Promotion	PSA	Promotion - Same Agency
Promotion ***	PTS ***	Promotion to Subsidiary ***
<b>Recall From Suspension</b>		
Recall	RES	Return from Suspension
Recall	RTS	Reinstatement Time Served Suspension
<b>Rehire</b>		
Rehire	AFF	Re-Hired From SBP/BMV
Rehire	ELC	Re-elected or Re-appointed
Rehire	RFL	Recall from Layoff
Rehire (Merit Only – Re-Employ Rights)	REN	Re-employment New Position
Rehire (Merit Only – Re-Employ Rights)	REP	Re-employment Replace
Rehire	RHN	Rehire – New Position
Rehire	RPL	Rehire – Replace
<b>Retirement</b>		
Retirement	RET	Retirement
<b>Return From Disability</b>		
Return From Disability	RFD	Return From Disability
<b>Return Leave of Absence</b>		
Return-LOA	RFL	Return From Leave
Return-LOA	RPL	Return From Paid Leave
Return-LOA	REM	Ret Ext Mil Ben Eff Regular
Return-LOA	RML	Ext Mil Ben Eff Event Date
<b>Short Term Disability With Pay</b>		
STD W/Pay (Paid Short Term Disability)	STD	Short Term Disability With Pay
<b>Suspension</b>		
Suspension	DAC	Disciplinary Action
Suspension	DSB	Disorderly Behavior

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# Training Guide

## Workforce Administration for Quasi Agencies v8.9

<b>Action</b>	<b>Reason</b>	<b>Description</b>
Suspension	EMG	Emergency Suspension
Suspension	ILA	Illegal Action
Suspension	TPD	30 Day Suspension Pending Dismissal
<b>Termination</b>		
Termination	AAN	Attendance/NEFR
Termination	AAY	Attendance/EFR
Termination	ATN	Tardiness/NEFR
Termination	ATY	Tardiness/EFR
Termination	DCN	Discharge/NEFR
Termination	DCY	Discharge/EFR
Termination	DEA	Death
Termination	DFN	Misrepresentation/NEFR
Termination	DFY	Misrepresentation/EFR
Termination	DHN	Dishonesty/NEFR
Termination	DHY	Dishonesty/EFR
Termination	DJN	Job Abandonment/NEFR
Termination	DJY	Job Abandonment/EFR
Termination	DLN	Failure to ret from leave/NEFR
Termination	DLY	Failure to ret from leave/EFR
Termination	DMN	Misconduct/NEFR
Termination	DMY	Misconduct/EFR
Termination	DRN	Release/NEFR
Termination	DRY	Release/EFR
Termination	DUN	Unsatisfactory work/NEFR
Termination	DUY	Unsatisfactory work/EFR
Termination	DVN	Violation of Rules/NEFR
Termination	DVY	Violation of Rules/EFR
Termination	EOT	End of Term – Elected Officials ONLY
Termination	GMI	Gross Misconduct
Termination	HFN	Illness in Family/NEFR
Termination	HFY	Illness in Family/EFR
Termination	ISN	Insubordination/NEFR
Termination	ISY	Insubordination/EFR
Termination	LOF	Layoff (MERIT AGENCIES ONLY)
Termination *	NML *	Non-Merit Layoff – Gov Re-Organization *
Termination	PCN	Child Care/House/NEFR
Termination	PCY	Child Care/House/EFR
Termination	PEN	Dissatisfied /fellow EEs/NEFR
Termination	PEY	Dissatisfied w/fellow EEs/EFR
Termination	PFN	Family Reasons/NEFR
Termination	PFY	Family Reasons/EFR
Termination	PHN	Dissatisfied with hours/NEFR
Termination	PHY	Dissatisfied with hours/EFR
Termination	PJN	Dissatisfied/Type of Work/NEFR
Termination	PJY	Dissatisfied/type of work/EFR
Termination	PLN	Dissatisfied with Location/NEF
Termination	PLY	Dissatisfied with Location/EFR
Termination	PMN	Marriage/NEFR

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<b>Action</b>	<b>Reason</b>	<b>Description</b>
Termination	PMY	Marriage/EFR
Termination	PPN	Dissatisfied w/policy/NEFR
Termination	PPY	Dissatisfied w/policy/EFR
Termination	PRN	Return to School/NEFR
Termination	PRY	Return to school/EFR
Termination	PSN	Dissatisfied w/Supv/NEFR
Termination	PSY	Dissatisfied w/Supv/EFR
Termination	PTN	Transportation Problems/NEFR
Termination	PTY	Transportation Problems/EFR
Termination	PUN	Dissatisfied w/Promo Opps/NEFR
Termination	PUY	Dissatisfied w/promo Opps/EFR
Termination	PWN	Dissatisfied w/Work Cond/NEFR
Termination	PWY	Dissatisfied w/Work Cond/EFR
Termination	QLO	Quasi Agency Layoff Only
Termination	REN	Early Retirement/NEFR
Termination	REY	Early Retirement/EFR
Termination	RMN	Mutual Consent/NEFR
Termination	RMY	Mutual Consent/EFR
Termination	RON	Resignation other job/NEFR
Termination	ROY	Resignation other job/EFR
Termination	RSN	Resignation/NEFR
Termination	RSY	Resignation/EFR
Termination	RTN	End Temporary Emp/NEFR
Termination	RTY	End Temporary Emp/EFR
Termination	SGB	Term from Quasi Agency
<b>Transfer</b>		
Transfer	BMV	Transfer To/From BMVC
Transfer	CES	Transfer To/From CES Agency
Transfer	PSA	Promotion - Same Agency
Transfer ***	PTS ***	Promotion to Subsidiary ***
Transfer	DSP	Demo - Same Agcy w/Pay Change
Transfer	DSW	Demo - Same Agcy w/o Pay Change
Transfer ***	DTS ***	Demotion to Subsidiary ***
Transfer	DDP	Demote-Diff Agency/Pay Change
Transfer	DDW	Demote-Diff Agency w/o Pay Change
Transfer	EER	Employee Request
Transfer ** Inactive effective 7/10/07	INT **	Internal Transfer **
Transfer	LDA	Lateral, Diff Agcy
Transfer	LSA	Lateral, Same Agcy
Transfer	MRR	Manager Request
Transfer	PDP	Promotion – Different Agency
Transfer	RDP	Return to Status - Diff Agency
Transfer	SGB	Transfer To/From SGB Agency
Transfer ***	TAF ***	Transfer to Affiliate ***
<b>Unpaid Leave of Absence</b>		
LOA (Leave of Absence)	EDU	Education
LOA (Leave of Absence)	9MO	9 Month School Emp-BenNoTerm
LOA (Leave of Absence)	9TR	9 Month School Emp – Ben Term

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# Training Guide

## Workforce Administration for Quasi Agencies v8.9

<b>Action</b>	<b>Reason</b>	<b>Description</b>
LOA (Leave of Absence)	FML	Family and Medical Leave Act
LOA (Leave of Absence)	HEA	Health Reasons
LOA (Leave of Absence)	MIL	Military Service - Extended
LOA (Leave of Absence)	MLF	Ext Mil Bill Family Rate
LOA (Leave of Absence)	PER	Personal
LOA (Leave of Absence) (Inactive 1/11/05)	UUN	Unpaid Union Leave
LOA (Leave of Absence)	WCP	Workers Comp

- \* - Requires SPD approval.
- \*\* - For use with E-Recruit process only.
- \*\*\* - DOC and FSSA/DCS agency use only.

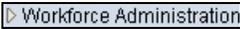
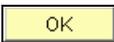
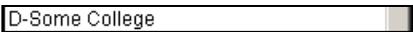
## Appendix D – 8 Benefit Stoppers



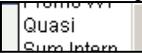
# 8 BENEFIT STOPPERS

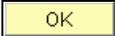
1. BLANK BIRTHDATE
2. BLANK/INCORRECT EMPLOYEE CLASS.
3. PERSONAL DATA EFFECTIVE DATE DOES NOT MATCH THE EFFECTIVE DATE OF HIRE OR IS NOT UPDATED TO MATCH EFFECTIVE DATE OF REHIRE
4. BAS ID IS BLANK
5. BENEFIT PROGRAM – SHOULD ALWAYS BE NON FOR HIRES/REHIRES
6. GENDER BLANK
7. COMPANY SENIORITY OR SERVICE DATE BLANK/INCORRECT
8. COUNTY OF RESIDENCE

**Appendix E - Hire a New Employee**

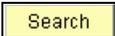
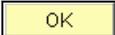
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Add a Person</b> button. 
3.	Click the <b>Add the Person</b> link. 
4.	Enter the effective date of hire into the <b>*Effective Date</b> field.
5.	If the format type does not default, select <b>English</b> from the list. 
6.	Click the <b>Add Name</b> link. 
7.	Enter the employee's first name into the <b>First Name</b> field.
8.	Enter the middle name or initial into the <b>Middle Name</b> field.
9.	Enter the employee's last name into the <b>Last Name</b> field.
10.	Click the <b>Suffix</b> list. 
11.	Select <b>Jr</b> from the list. 
12.	Click the <b>OK</b> button. 
13.	Enter the employee's date of birth into the <b>Date of Birth</b> field..
14.	Enter the effective date of hire into the <b>*Effective Date</b> field for Biographical Information. .
15.	Select the employee's <b>gender</b> from the list of values. 
16.	Select the employee's <b>highest education level</b> from the list of values. 
17.	Select the employee's <b>Marital Status</b> from the list. 
18.	Enter the employee's social security number into the <b>National ID</b> field.
19.	Click the <b>Contact Information</b> tab. 
20.	Click the <b>Edit/View Address Detail</b> link. 
21.	Click the <b>Add Address</b> link. 
22.	Enter the employee's address into the <b>Address 1</b> field.

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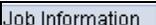
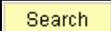
23.	Enter the employee's city into the <b>City</b> field.
24.	Enter the employee's state into the <b>State</b> field.
25.	Enter the employee's zip code into the <b>Postal</b> field.
26.	Enter the county of residence into the <b>County</b> field.
27.	Click the <b>OK</b> button. 
28.	Click the <b>OK</b> button. 
29.	Click the appropriate phone type from the list. 
30.	Enter the employee's telephone number into the <b>Telephone</b> field.
31.	Select the email type from the list. 
32.	Enter the employee's email address into the <b>*Email Address</b> field.
33.	Click the <b>Regional</b> tab. 
34.	Click the <b>Look up Ethnic Group (Alt+5)</b> button. 
35.	Select the appropriate value from the list.
36.	Click the <b>Organizational Relationships</b> tab. 
37.	Click the <b>Employee</b> option. 
38.	Click the <b>Add the Relationship</b> button. 
39.	Enter the appropriate reason code into the reason field.
40.	Enter the PCN into the <b>Position Number</b> field.
41.	Press <b>[Tab]</b> .
42.	Click the <b>Job Information</b> tab. 
43.	Select the appropriate <b>Empl Class</b> from the list. 
44.	Click the <b>Job Labor</b> tab. 
45.	Enter the effective date of hire into the <b>Union Seniority Date</b> field.
46.	Click the <b>Payroll</b> tab. 

47.	Verify the pay group defaulted correctly. If necessary, enter the pay group into the <b>Pay Group</b> field.
48.	Click the <b>Compensation</b> tab. 
49.	Enter the bi-weekly compensation rate. When finished, click the <b>Calculate Compensation</b> button.  If applicable, click employment data and enter the probation date. 
50.	Click the <b>Benefits Program Participation</b> link. 
51.	Enter the BAS Group ID into the <b>BAS Group ID</b> field.
52.	Click the <b>OK</b> button. 
53.	<b>End of Procedure.</b>

## Appendix F - Entering a Rehire

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Modify a Person</b> button. 
3.	Enter the employee id number into the <b>Personal Information</b> field.
4.	Click the <b>Search</b> button. 
5.	Enter the effective date of rehire into the <b>*Effective Date</b> field.
6.	Click the <b>Edit Name</b> link and enter any necessary changes to the employee's name. 
7.	Click the <b>OK</b> button. 
8.	Make any necessary changes to the employee's gender, highest education level, and/or marital status.
9.	Click the <b>Contact Information</b> tab. 
10.	Verify the address is correct. To change the address, click the <b>Edit/View Address Detail</b> link. 

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11.	Click the <b>Add a new row at row 1 (Alt+7)</b> button to add a new address. 
12.	Enter the effective date of rehire into the <b>Effective Date</b> field.
13.	Click the <b>Update/View Address</b> link. 
14.	Make any necessary changes to the employee's address.
15.	Click the <b>OK</b> button. If there is a mailing address as well, be sure to update the effective date to reflect the date of rehire. 
16.	Click the <b>Regional</b> tab. 
17.	Click the <b>Save</b> button. 
18.	Click the <b>Job Information</b> link. 
19.	Click the <b>Job Data</b> button. 
20.	Enter the employee's id number into the Employee ID field.
21.	Click the <b>Search</b> button. 
22.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
23.	Enter the effective date of rehire into the <b>*Effective Date</b> field. .
24.	Select Rehire from the list. 
25.	Enter the reason code into the <b>Reason Code</b> field. Enter a valid value e.g. " <b>rpl</b> ".
26.	Enter the PCN into the <b>Position Number</b> field.
27.	Press <b>[Tab]</b> .
28.	Click the <b>Job Information</b> tab. 
29.	Select the employee class from the list. 
30.	Click the <b>Job Labor</b> tab. 
31.	Enter the effective date of rehire into the <b>Union Seniority Date</b> field.
32.	Click the <b>Compensation</b> tab. 

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33.	If necessary, update the bi-weekly compensation rate. When finished, click the <b>Calculate Compensation</b> button. 
34.	Click the <b>Employment Data</b> link. 
35.	Enter the adjusted accrual date into the <b>Company Seniority Date</b> field.
36.	Click the <b>Refresh</b> button. 
37.	Enter the effective date of rehire into the <b>Benefits Service Date</b> field.
38.	Click the <b>Benefits Program Participation</b> link. 
39.	Enter the BAS ID into the <b>BAS Group ID</b> field.
40.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
41.	Enter the effective date of rehire into the <b>*Effective Date</b> field. "
42.	Enter the NON into the <b>*Benefit Program</b> field.
43.	Click the <b>Save</b> button. 
44.	<b>End of Procedure.</b>

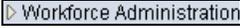
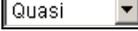
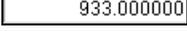
## Appendix G - Entering an Employee Transfer

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id into the <b>Search</b> field.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the transfer effective date into the <b>*Effective Date</b> field.
7.	Click the <b>Employee Status</b> list. 
8.	Select Transfer from the list of Action codes. 

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9.	Click the <b>Look up (Alt+5)</b> button. 
10.	Select the appropriate reason code from the list. 
11.	Enter the PCN into the <b>Position Number</b> field.
12.	Press <b>[Tab]</b> .
13.	Click the <b>Job Information</b> tab. 
14.	Select the appropriate Employee Class from the list. 
15.	Click the <b>Job Labor</b> tab. 
16.	Verify the Union Seniority Date reflects the initial date of hire or rehire. 
17.	Click the <b>Payroll</b> tab. 
18.	Verify the pay group is entered correctly. If necessary, enter the desired information into the <b>Pay Group</b> field.
19.	Click the <b>Compensation</b> tab. 
20.	Enter the bi-weekly compensation rate into the <b>Comp Rate</b> field.
21.	Click the <b>Calculate Compensation</b> button. 
22.	Click the <b>Benefits Program Participation</b> link. If necessary, update the BAS Group ID. 
23.	Click the <b>Save</b> button. 
24.	<b>End of Procedure.</b>

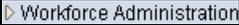
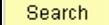
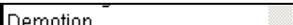
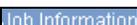
## Appendix H - Entering a Promotion

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the Employee ID Number into the <b>Search</b> field.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date of the promotion into the <b>*Effective Date</b> field.
7.	Click the <b>Employee Status</b> list. 
8.	Select Promotion from the list. 
9.	Click the <b>Look up (Alt+5)</b> button. 
10.	Select the appropriate reason code from the list of values. 
11.	Enter the PCN into the <b>Position Number</b> field.
12.	Press <b>[Tab]</b> .
13.	Click the <b>Job Information</b> tab. 
14.	Select the appropriate Empl Class from the list of values. 
15.	Click the <b>Job Labor</b> tab. 
16.	Click the <b>Payroll</b> tab and verify the pay group is correct. 
17.	Click the <b>Compensation</b> tab. 
18.	If necessary, update the bi-weekly compensation rate. 
19.	Click the <b>Calculate Compensation</b> button. 
20.	Click the <b>Save</b> button. 

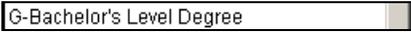
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21.	<b>End of Procedure.</b>
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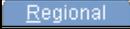
## Appendix I - Entering a Demotion

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> button. 
3.	Enter the employee id number into the <b>Search</b> field.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
6.	Enter the effective date of the demotion into the <b>*Effective Date</b> field.
7.	Select Demotion from the list. 
8.	Select the appropriate reason from the list of values. 
9.	Enter the PCN into the <b>Position Number</b> field.
10.	Press <b>[Tab]</b> .
11.	Point to the object. 
12.	Click the <b>Job Information</b> tab. 
13.	Change the employee class if necessary. 
14.	Click the <b>Compensation</b> tab. 
15.	If necessary, adjust the bi-weekly 
16.	Click the <b>Calculate Compensation</b> button. 
17.	Click the <b>Save</b> button. 
18.	<b>End of Procedure.</b>

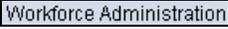
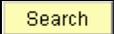
## Appendix J - Updating Biographical Information

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Modify a Person</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number. Enter a valid value e.g. " <b>10000240692</b> ".
4.	Click the <b>Search</b> button. 
5.	To make a name change, click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field. Enter a valid value e.g. " <b>050107</b> ".
7.	Click the <b>Edit Name</b> link. 
8.	This example reflects a change in the employee's last name.  Enter the last name into the <b>Last Name</b> field.
9.	Click the <b>OK</b> button. 
10.	To make a change to the <b>employee's gender, highest education level, or marital status</b> , click the <b>Add a new row (Alt+7)</b> button in the <b>Biographical History</b> section. 
11.	Enter the effective date of the change into the <b>*Effective Date</b> field.
12.	Click the <b>*Highest Education Level</b> field drop-down menu button. 
13.	Select <b>G-Bachelor's Level Degree</b> from the list of values. 
14.	Click the <b>*Marital Status</b> field drop-down menu button. 
15.	Select <b>Married</b> from the list of values. 
16.	Enter the effective date of the marital status change into the <b>As of</b> field.
17.	Click the <b>Contact Information</b> tab. 
18.	Click the <b>Edit/View Address Detail</b> link. 

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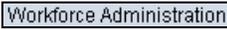
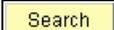
19.	Utilize the <b>Add Address</b> link to modify address information. 
20.	To add a telephone number, click the <b>Add a new row (Alt+7)</b> button. 
21.	After clicking on the <b>*Phone Type</b> drop-down menu button, select <b>Cellular</b> from the list of values. 
22.	Enter the phone number into the <b>Telephone</b> field. Enter a valid value e.g. <b>"6025551213"</b> .
23.	To add an additional email address, click the <b>Add a new row (Alt+7)</b> button. 
24.	Select the correct email type and enter the email address into the <b>*Email Address</b> field.
25.	Click the <b>Regional</b> tab. 
26.	When making a personal data change, verify that the <b>Ethnic Group</b> field has been populated. To record the employee's Ethnic Group, click the <b>Ethnic Group Magnifying Glass (Alt+5)</b> button. 
27.	In this example, select the <b>White</b> link from the list of values.
28.	Click the <b>Save</b> button. 
29.	<b>End of Procedure.</b>

## Appendix K - Updating Emergency Contact Information

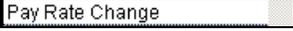
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Personal Information</b> button. 
3.	Click the <b>Emergency Contact</b> button. 
4.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
5.	Click the <b>Search</b> button. 
6.	Enter the contact's name into the <b>*Contact Name</b> field.

7.	After clicking the <b>*Relationship to Employee</b> field drop-down menu button, select <b>Father</b> from the list of values. 
8.	Click the <b>Primary Contact</b> check box to select it. <input type="checkbox"/>
9.	Click the <b>Edit Address</b> link. 
10.	Enter the contact's address into the <b>Address 1</b> field.
11.	Enter the contact's city into the <b>City</b> field.
12.	Enter the contact's state into the <b>State</b> field.
13.	Enter the contact's zip code into the <b>Postal</b> field.
14.	Enter the contact's county into the <b>County</b> field.
15.	Click the <b>OK</b> button. 
16.	Enter the contact's phone number into the <b>Phone</b> field. Enter a valid value e.g. <b>"2175558989"</b> .
17.	Click the <b>Other Phone Numbers</b> tab. 
18.	After clicking the <b>*Phone Type</b> field drop-down menu button, select <b>Cellular</b> from the list of values.
19.	Enter the contact's phone number into the <b>Phone</b> field. Enter a valid value e.g. <b>"2172514655"</b> .
20.	Click the <b>Save</b> button. 
21.	<b>End of Procedure.</b>

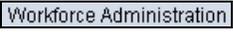
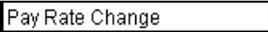
## Appendix L - Entering a Pay Rate Change

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee's ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 

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6.	Enter the effective date into the <b>*Effective Date</b> field. Enter a valid value e.g. " <b>051407</b> ".
7.	Press the <b>[Tab]</b> key.
8.	Click the <b>Action / Reason</b> field drop-down menu button. 
9.	Select <b>Pay Rate Change</b> from the list of values. 
10.	Enter the correct reason code into the <b>Reason</b> field.
11.	Click the <b>Compensation</b> tab. 
12.	Enter the new biweekly salary into the <b>Comp Rate</b> field.
13.	Click the <b>Calculate Compensation</b> button. 
14.	Click the <b>Save</b> button. 
15.	<b>End of Procedure.</b>

## Appendix M - Begin Working Leader Assignment

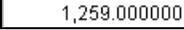
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Press the <b>[Tab]</b> key.
8.	After clicking the <b>Action / Reason</b> field drop-down menu button, select <b>Pay Rate Change</b> from the list of values. 
9.	Click the <b>Reason Magnifying Glass (Alt+5)</b> button to view a list of reason codes. 
10.	Select <b>STA Position Status Change</b> from the list of values. 

11.	Verify the <b>position number</b> is correct and change the number if necessary. <input type="text" value="10002978"/>
12.	Click the <b>Override Position Data</b> button. <input type="button" value="Override Position Data"/>
13.	Click the <b>Job Information</b> tab. <input type="button" value="Job Information"/>
14.	After clicking the <b>*Regular Shift</b> field drop-down menu button, select <b>Work Ldr</b> from the list of values. <input type="text" value="Work Ldr"/>
15.	Click the <b>Compensation</b> tab. <input type="button" value="Compensation"/>
16.	If necessary adjust the biweekly rate of pay in the <b>Comp Rate</b> field. <input type="text" value="1,259.000000"/>
17.	Click the <b>Calculate Compensation</b> button. <input type="button" value="Calculate Compensation"/>
18.	Click the <b>Save</b> button. <input type="button" value="Save"/>
19.	<b>End of Procedure.</b>

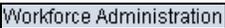
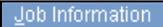
## Appendix N - End Working Leader Assignment

1.	Click the <b>Workforce Administration</b> link. <input type="button" value="Workforce Administration"/>
2.	Click the <b>Job Data</b> link. <input type="button" value="Job Data"/>
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. <input type="button" value="Search"/>
5.	Click the <b>Add a new row (Alt+7)</b> button. <input type="button" value="+"/>
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	After clicking the <b>Action / Reason</b> field drop-down menu button, select <b>Position Change</b> from the list of values. <input type="text" value="Position Change"/>
8.	Enter <b>STA</b> into the <b>Reason Code</b> field.

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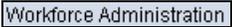
9.	After clicking the <b>*Regular Shift</b> field drop-down menu button, select <b>1</b> from the list of values. 
10.	Click the <b>Compensation</b> tab. 
11.	Adjust the biweekly compensation rate in the <b>Comp Rate</b> field. 
12.	Click the <b>Calculate Compensation</b> button. 
13.	Click the <b>Save</b> button. 
14.	<b>End of Procedure.</b>

## Appendix O - Permanent Status/Extend Working Test

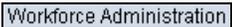
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field. .
7.	After clicking the <b>Action / Reason</b> field drop-down menu button, select <b>Data Change</b> from the list of values. 
8.	Click the <b>Reason Code Magnifying Glass (Alt+5)</b> button. 
9.	Select the appropriate reason code ( <b>Completed Working Test or Extended Working Test</b> ) from the list of values. 
10.	Click the <b>Job Information</b> tab. 
11.	After clicking the <b>Empl Class</b> field drop-down menu button, select the appropriate employee class ( <b>Perm Status, XOrig WT, or XPromo WT</b> ) from the list of values. 

12.	Scroll to the bottom of the page to locate the <b>Save</b> button.
13.	Click the <b>Save</b> button. 
14.	<b>End of Procedure.</b>

## Appendix P -Entering a Suspension

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	After clicking the <b>Action / Reason</b> field drop-down menu button, select <b>Suspension</b> from the list of values. 
8.	Click the <b>Reason Code Magnifying Glass (Alt+5)</b> button. 
9.	Select <b>DAC Disciplinary Action</b> from the list of values. 
10.	Click the <b>Save</b> button. 
11.	<b>End of Procedure.</b>

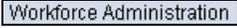
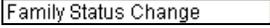
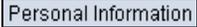
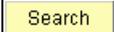
## Appendix Q - Entering a Termination

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.

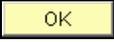
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4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	After clicking the Action / Reason field drop-down menu button, select <b>Termination</b> from the list of values. 
8.	Enter the correct reason code into the <b>Reason</b> field.
9.	Click the <b>Save</b> button. 
10.	<b>End of Procedure.</b>

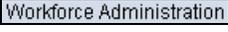
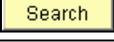
## Appendix R - Family Status Change

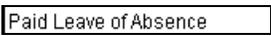
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date of the family status change into the <b>*Effective Date</b> field.
7.	After clicking the <b>Action / Reason</b> field drop-down menu button, select <b>Family Status Change</b> from the list of values. 
8.	Click the <b>Reason Code Magnifying Glass (Alt+5)</b> button. 
9.	Select the appropriate reason code from the list. In this example, select <b>MRI Emp Marriage Eff on Event Dt.</b> 
10.	Click the <b>Save</b> button. 
11.	As a result of a marriage, divorce, or death of a spouse, the employee's personal data may require modification. In this example, the employee has submitted a family status change due to marriage, which will require the user to update the <b>employee's last name</b> and <b>marital status</b> .  Click the <b>Expand Menu (Ctrl+Y)</b> button.
12.	Click the <b>Personal Information</b> link. 
13.	Click the <b>Modify a Person</b> link. 
14.	Enter the Employee ID Number into the <b>Biographical</b> field. Enter a valid value e.g. <b>"1000240692"</b> .
15.	Click the <b>Search</b> button. 
16.	Click the <b>Add a new row (Alt+7)</b> button. 

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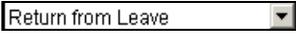
17.	Enter the effective date of the family status change into the <b>*Effective Date</b> field. Enter a valid value e.g. " <b>051507</b> ".
18.	Click the <b>Edit Name</b> link. 
19.	Enter the last name into the <b>Last Name</b> field. Enter a valid value e.g. " <b>Vaughn</b> ".
20.	Click the <b>OK</b> button. 
21.	Click the <b>Add a new row (Alt+7)</b> button. 
22.	Enter the effective date of the family status change into the <b>*Effective Date</b> field. Enter a valid value e.g. " <b>051507</b> ".
23.	After clicking on the <b>*Marital Status</b> field drop-down menu button, select the appropriate <b>marital status</b> from the list of values.  In this example, the status changed to <b>Married</b> as shown on the next screen. 
24.	Enter the effective date of the marital status change into the <b>As of</b> field.
25.	Click the <b>Contact Information</b> tab and make any necessary modifications to the <b>employee's address, telephone, or email</b> information. 
26.	Click the <b>Save</b> button. 
27.	<b>End of Procedure.</b>

## Appendix S - Entering a Paid Leave of Absence

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number. Enter a valid value e.g. " <b>1000240692</b> ".
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field. Enter a valid value e.g. " <b>050107</b> ".

7.	Click the <b>Action / Reason</b> field drop-down menu button. 
8.	Select <b>Paid Leave of Absence</b> from the list of values. 
9.	Click the <b>Reason Code Magnifying Glass (Alt+5)</b> button. 
10.	Select the appropriate reason code. In this example, select <b>FML Paid FMLA Use Accrued Time</b> from the list of values. 
11.	Click the <b>Save</b> button.  <b>Note:</b> After saving, ensure that the last date worked field reflects the last day the employee worked. If the date is incorrect, check the <b>Override Last Date Worked</b> checkbox and enter the correct date. Be sure to <b>Save</b> again. 
12.	<b>End of Procedure.</b>

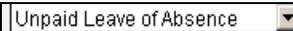
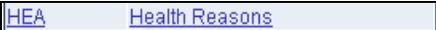
## Appendix T - Entering a Return from Leave of Absence

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Click the <b>Action / Reason</b> field drop-down menu button. 
8.	Select <b>Return from Leave</b> from the list of values. 
9.	Click the <b>Reason Code Magnifying Glass (Alt+5)</b> button. 
10.	Select the appropriate reason code from the list. In this example, select <b>RPL Return from Paid Leave</b> . 

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11.	Click the <b>Save</b> button. 
12.	<b>End of Procedure.</b>

## Appendix U - Entering a Non-Paid Leave of Absence

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	After clicking on the <b>Action / Reason</b> field drop-down menu button, select <b>Unpaid Leave of Absence</b> from the list of values. 
8.	Click the <b>Reason Code Magnifying Glass (Alt+5)</b> button. 
9.	Select the appropriate reason code from the list. In this example, select <b>HEA Health Reasons</b> from the list of values. 
10.	Click the <b>Save</b> button. 
11.	<b>End of Procedure.</b>

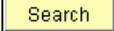
## Appendix V - Short Term Disability with Pay

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 

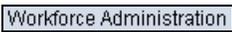
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5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	After clicking the Action / Reason field drop-down menu button, select <b>Short Term Disability with Pay</b> from the list of values. 
8.	Enter the appropriate reason code into the <b>Reason</b> field.
9.	Click the <b>Save</b> button. 
10.	<b>End of Procedure.</b>

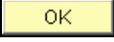
### Appendix W - Long Term Disability with Pay

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Job Data</b> link. 
3.	Click in the <b>EmplID</b> field to enter the Employee ID Number.
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add a new row (Alt+7)</b> button. 
6.	Enter the effective date into the <b>*Effective Date</b> field.
7.	Click the <b>Action / Reason</b> field drop-down menu button. 
8.	Select <b>Long Term Disability with Pay</b> from the list of values. 
9.	Enter the appropriate reason code into the <b>Reason</b> field.
10.	Click the <b>Save</b> button. 
11.	<b>End of Procedure.</b>

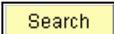
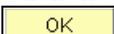
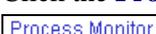
### Appendix X - Staffing Report by BU

1.	Click the <b>Workforce Administration</b> link. 
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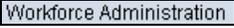
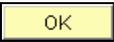
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2.	Click the <b>Workforce Reports</b> button. 
3.	Scroll to the bottom of the page to locate the <b>Staffing report by BU</b> button.
4.	Click the <b>Staffing report by BU</b> button. 
5.	If you have previously ran this report, enter the <b>Run Control ID</b> into the <b>Search By</b> field.  Click in the <b>Search By</b> field and enter
6.	If you do not have an established <b>Run Control ID</b> , click the <b>Add a New Value</b> tab. 
7.	Enter the desired value into the <b>Run Control ID</b> field. Enter
8.	Click the <b>Add</b> button. 
9.	Enter the staffing report date into the <b>As Of Date</b> field. Enter a valid value e.g. <b>"050107"</b> .
10.	Enter the business unit ID into the <b>Business Unit</b> field. Enter a valid value e.g. <b>"00070"</b> .
11.	Click the <b>Run</b> button. 
12.	Click the <b>OK</b> button. 
13.	Click the <b>Process Monitor</b> link. 
14.	Click the <b>Refresh</b> button until the <b>Run Status</b> field changes to <b>Success</b> and the <b>Distribution Status</b> field changes to <b>Posted</b> . 
15.	Click the <b>Details</b> link. 
16.	Click the <b>View Log/Trace</b> link. 
17.	Click the PDF <b>URL</b> link located under the <b>Name</b> field. In this example, select the <b>SOI0088 454735.PDF</b> link. 
18.	The report generates as a PDF file. To print the results: click <b>File</b> , then <b>Print</b> , then <b>OK</b> to print a copy of the staffing report.
19.	<b>End of Procedure.</b>

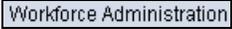
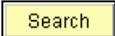
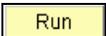
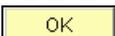
## Appendix Y - Job Code Report

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Workforce Reports</b> button. 
3.	Click the <b>Job Code Listing - Alpha</b> button. 
4.	If you have previously run this report, enter the <b>Run Control ID</b> into the <b>Search by</b> field.  Click in the <b>Search by</b> field and enter " <b>R</b> a valid value e.g. " <b>run</b> ".
5.	Click the <b>Search</b> button. 
6.	Click the <b>Run</b> button. 
7.	Click the <b>OK</b> button. 
8.	Click the <b>Process Monitor</b> link. 
9.	Click the <b>Refresh</b> button. 
10.	Click the <b>Details</b> link under the <b>Details</b> field. 
11.	Click the <b>View Log/Trace</b> link. 
12.	Click the PDF <b>URL</b> link located under the <b>Name</b> field. In this example, select the <b>SOIHR006_454334.PDF</b> link. 
13.	The report generates as a .PDF file. To print the results: click <b>File</b> , then <b>Print</b> , then <b>OK</b> to print a copy of the report.  Click the <b>anywhere on the report</b> object.
14.	<b>End of Procedure.</b>

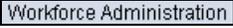
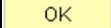
## Appendix Z - Permanent Status Due

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Workforce Reports</b> button. 
3.	Scroll to the bottom of the page to locate the <b>Permanent Status Due</b> button.
4.	Click the <b>Permanent Status Due</b> button. 
5.	Click in the <b>Run Control ID</b> field to enter the run control ID.
6.	Enter the report request parameter into the <b>From Date</b> field. Enter a valid value e.g. " <b>030107</b> ".
7.	Enter the report request parameter into the <b>Thru Date</b> field. Enter a valid value e.g. " <b>050107</b> ".
8.	Click the <b>Run</b> button. 
9.	Click the <b>OK</b> button. 
10.	Click the <b>Process Monitor</b> link. 
11.	Click the <b>Refresh</b> button until the <b>Run Status</b> field changes to <b>Success</b> and the <b>Distribution Status</b> field changes to <b>Posted</b> . 
12.	Click the <b>Details</b> link. 
13.	Click the <b>View Log/Trace</b> link. 
14.	Click the PDF <b>URL</b> link located under the <b>Name</b> field. In this example, select the <b>SOI0030C_454335.PDF</b> link. 
15.	The report generates as a PDF file. to print the results: click <b>File</b> , then <b>Print</b> , then <b>OK</b> to print a copy of the staffing report.  Click <b>anywhere on the report</b> to continue.
16.	<b>End of Procedure.</b>

**Appendix AA - Permanent Status Past Due**

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Workforce Reports</b> link. 
3.	Scroll to the bottom of the page to locate the <b>Permanent Status Past Due</b> link.
4.	Click the <b>Permanent Status Past Due</b> link. 
5.	If you have previously run this report, enter the <b>Run Control ID</b> into the <b>Search by</b> field.  Click in the <b>Search by</b> field and enter
6.	Click the <b>Search</b> button. 
7.	Click the <b>Run</b> button. 
8.	Click the <b>OK</b> button. 
9.	Click the <b>Process Monitor</b> link. 
10.	Click the <b>Refresh</b> button.  The report is accessed using the same key strokes as reviewed in previous report directions:  Click the <b>Details</b> link.  Click the <b>View/Log Trace</b> link.  Click the <b>PDF hyperlink</b> .  The report will appear as a PDF file. 
11.	<b>End of Procedure.</b>

## Appendix BB - Turn Over

1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Workforce Reports</b> link. 
3.	Click the <b>Employee Turnover Analysis</b> link. 
4.	Enter the <b>Run Control ID</b> into the <b>Run Control ID</b> field.
5.	Click the <b>Search</b> button. 
6.	Click the <b>Run</b> button. 
7.	Click the <b>Process List</b> checkbox under the <b>Select</b> field by the report to be processed. <input type="checkbox"/>
8.	Click the <b>OK</b> button. 
9.	Click the <b>Process Monitor</b> link. 
10.	Click the <b>Refresh</b> button. 
11.	Click the <b>Refresh</b> button.  The report is accessed using the same key strokes as reviewed in previous report directions:  Click the <b>Details</b> link.  Click the <b>View/Log Trace</b> link.  Click the <b>PDF hyperlink</b> .  The report will appear as a PDF file. 
12.	<b>End of Procedure.</b>