

Checklist – Hiring a Legacy Employee Not Converted to PeopleSoft to Process Payline Adjustments

Version 1.0 | Updated May 23, 2017

Scenario: We are paying a retro to EEID 123456 for Position 12345678 for time worked between 7/1/16 thru 11/08/16. Since the employee was termed from this position prior to conversion, there is no existing Job History for that employee in that Position in PeopleSoft. What needs to happen to process this retro?

What to do: Since the employee does not exist in PeopleSoft you will need to **add the Position, Personal Information, and hire and terminate the employee in Job Data**. The effective dates must encompass the period of time that you will be issuing a retro for. After this is done, your Payroll Department can issue the retro. **IMPORTANT: You will not need to enter Absence Management, Time Reporter Data, Work Schedule, Benefits, Payroll Deductions, or DBT.**

FOR RETRO PURPOSES ONLY		
<input type="checkbox"/> Start with the Person Search query to ensure the Person does not exist in PeopleSoft. <i>Main Menu > Reporting Tools > Query > Query Viewer - M_PERSON_SEARCH</i>		
Add Position (if needed)	Add Personal Data	Add Job Data Record
If Position already exists in PeopleSoft, skip this column.	If Personal Data already exists in PeopleSoft, skip this column.	Begin here if Personal Data already exists in PeopleSoft. If beginning here use Add Employment Instance .
<p>Description tab</p> <input type="checkbox"/> Effective Date <input type="checkbox"/> Reason <input type="checkbox"/> Job Code <i>beginning with 1=Certificated, 2=Classified</i> <input type="checkbox"/> Reg/Temp <input type="checkbox"/> Full/Part Time <input type="checkbox"/> Union Code <input type="checkbox"/> Title /Short Title <input type="checkbox"/> Department <input type="checkbox"/> Location <input type="checkbox"/> Reports To <input type="checkbox"/> Salary Admin Plan <input type="checkbox"/> Salary Grade <input type="checkbox"/> Standard Hours <i>Hourly = 1.00</i> <i>Daily = 5.00</i> <i>If not daily or hourly, must also enter FTE</i> <p>Specific Information tab</p> <input type="checkbox"/> FTE <i>If entering an FTE, you must also enter Standard Hours</i> <p>CDAYS Track tab</p> <input type="checkbox"/> CDAYS Track <i>Certificated Positions only</i> <input type="checkbox"/> SAVE	<p>Biographical Details tab</p> <input type="checkbox"/> Effective Date <input type="checkbox"/> Add Name <input type="checkbox"/> DOB <input type="checkbox"/> Gender <input type="checkbox"/> National ID (SSN) <p>Contact Information tab</p> <input type="checkbox"/> Add Address <input type="checkbox"/> Phone Numbers <input type="checkbox"/> Email <p>Regional tab</p> <input type="checkbox"/> Ethnic Group <p>Organizational Relationship tab</p> <input type="checkbox"/> Add Relationship <input type="checkbox"/> Note Empl ID # _____ <p>IMPORTANT! If you stop here and come back to complete Job Data, must resume on Add Employment Instance screen.</p>	<p>Work Location tab</p> <input type="checkbox"/> Effective Date (start date) <input type="checkbox"/> Action (Defaults to Hire) <input type="checkbox"/> Reason <input type="checkbox"/> Job Indicator <input type="checkbox"/> Position Number <p>Job Information tab</p> <input type="checkbox"/> Empl Class <p>Payroll tab</p> <input type="checkbox"/> Absence System, select Other <input type="checkbox"/> Pay Group <input type="checkbox"/> Holiday Schedule <input type="checkbox"/> FICA Status <p>Salary Plan tab</p> <input type="checkbox"/> Step <p>Compensation tab</p> <input type="checkbox"/> Verify Frequency and Rate Code <input type="checkbox"/> Click Default Pay Components <input type="checkbox"/> Click Calculate Compensation <input type="checkbox"/> Verify Compensation Rate <p>SDCOE Job Data tab</p> <input type="checkbox"/> Checkbox all 12 months <p>Benefits Program Participation link</p> <input type="checkbox"/> Enter your District # <hr/> <input type="checkbox"/> Save <p style="text-align: center;">IMPORTANT!</p> <input type="checkbox"/> Add a row and TERMINATE THE EMPLOYEE. This is critical to ensure they do not get paid beyond retro. <hr/> <input type="checkbox"/> Notify your payroll department that retro can be processed.