PeopleSoft

HCM End-to-End Session

Version 5.0 | Updated December 9, 2016

Contents

SAN DIEGO COUNTY OFFICE OF EDUCATION

PREPARED BY THE SDCOE CUSTOMER RESOURCE CENTER

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Session Overview

Topics:

1. **HCM roles – who does what?**
2. **Review of how the HCM modules fit together**
3. **Enter one new hire from start to finish:**
   - **From HR training.** Here you will enter personal information and job data.
   - **From Payroll training.** Enter worker's comp, tax withholdings, and direct deposit.
   - **From Benefits training.** Enroll the new hire in Benefits.
   - **From Time & Labor and Absence training.** Enter time and absences; approve time and absences.
   - **From Query Viewer training.** Run queries to review the data entered.

We will refer to the new hire checklists in this handout. For full directions with screenshots, please refer to copies of your guides from training.

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HR New Hires Checklist

☐ **Start with the Person Search query.** *Main Menu > Reporting Tools > Query > Query Viewer - **M_PERSON_SEARCH***

Add a New Hire: Personal Data

If Personal Data already exists in PeopleSoft, skip this column.

Biographical Details tab

☐ Effective Date
☐ Add Name
Exactly as it appears on Social Security Card
☐ DOB
☐ Gender
☐ National ID (SSN)

Contact Information tab

☐ Add Address
☐ Phone Numbers
☐ Email

Regional tab

☐ Ethnic Group

Organizational Relationship tab

☐ Add Relationship
☐ Note Empl ID

#____________________

IMPORTANT! If you stop here and come back to complete Job Data, must resume on Add Employment Instance screen.

Add a New Hire: Job Data Record

Begin here if Personal Data already exists in PeopleSoft. If beginning here use **Add Employment Instance**.

Work Location tab

☐ Effective Date (start date)
☐ Action (Defaults to Hire)
☐ Reason
☐ Job Indicator
☐ Position Number

Job Information tab

☐ Empl Class
☐ Review fields from Position

Job Labor tab (skip this tab)

Payroll tab

☐ Absence System
If this is selected, you must also select a Paygroup under Absence Management System (AMS)
☐ Pay Group
☐ Employee Type
☐ Holiday Schedule
☐ FICA Status
☐ (AMS) Paygroup
☐ Accrual Hours Factor

Salary Plan tab

☐ Step
☐ Verify Step Entry Date

Compensation tab

☐ Verify Frequency (10 and 11 month options are for Certificated ONLY)
☐ Verify Rate Code (NAANNL, NAHRLY, etc.)
☐ Default Pay Components
☐ Calculate Compensation
☐ Verify Compensation Rate

SDCOE Job Data tab

☐ **FOR CLASSIFIED HOURLY ONLY:** If necessary check **Greater than 20 Hrs Sched? checkbox**
☐ Checkbox months Employee receives a check (this should match the Comp Rate Frequency on Compensation tab)

Benefits Program Participation link

☐ Update Benefit Record # to your District # (i.e. 99)

IMPORTANT!
Click OK or Save to save Job Data now.
If you began by entering Personal Data, this will return you to that screen upon saving.

Time Reporter Data

This step activates the timesheet for this employee in this Job.

After Job Data is saved:
Employment Data > Time Reporter Data > Time and Labor Data window

Required for Time & Labor:

☐ Effective Date (start date)
☐ Time Reporter Type
☐ Elapsed Time Template
☐ Time Period ID
☐ Workgroup
☐ Taskgroup

Assign a Work Schedule

IMPORTANT! Must do for Salaried and Exception Hourly Employees.

Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

☐ Effective Date (start date)
☐ Assignment Method (Select Predefined)
☐ Schedule Group (SDCOE)
☐ Schedule ID

Other Items (if applicable)

HR Items:

☐ Multiple Components of Pay (MCOP)
☐ TB Test

Payroll Items:

☐ Additional Pay
☐ General Deductions
☐ Federal Tax Data
☐ Direct Deposit

Benefits Items:

☐ Benefits Enrollment (within 30 days of hire)

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Payroll New Hires Checklist

Add Additional Pay

Create Additional Pay

- ☐ Earnings Code
- ☐ Effective Date
- ☐ Addl Seq Nbr
- ☐ Earnings
- ☐ OK to Pay
- ☐ Percent of Base (checkbox)
- ☐ Percent of Base
- ☐ Applies to Pay Periods (defaults to First)

Override Additional Pay (EmplID)

- ☐ Select/Deselect Additional Pay Periods

IMPORTANT! Multiple Components of Pay (MCOPs) are established as a part of Human Resources at *Main Menu* > *Workforce Administration* > *Job Information* > *Job Data*.

Add General Deductions

Create General Deductions

- ☐ Create Workers Compensation Deduction
  A Workers Compensation deduction must be established for all covered employees. Effective date should be employee date of hire.
- ☐ Deduction Code
- ☐ Effective Date
- ☐ Calculation Routine
- ☐ Flat/Addl Amount
- ☐ Goal Amount

Override Deductions (Employee)

- ☐ Select/Deselect Deduction Override Settings

Add Employee Tax Data

Federal Tax Data

- ☐ Effective Date
  One day after employee date of hire.
- ☐ Tax Marital Status
- ☐ Withholding Allowances
- ☐ Additional Amount
- ☐ Additional Percentage
- ☐ Lock-In Letter/Limit on Allowances
- ☐ Effective Date
- ☐ Tax Marital Status

State Tax Data

- ☐ State
- ☐ Resident
- ☐ UI Jurisdiction
- ☐ Exempt from SUT
- ☐ State Disability Insurance
- ☐ Tax Marital Status
- ☐ Withholding Allowances
- ☐ Additional Amount
- ☐ Additional Percentage
- ☐ Special Withholding Tax Status
- ☐ Lock-In Letter/Limit on Allowances

IMPORTANT! Board Members and Student Workers are exempt from SUT

Establish Direct Deposits

Request Direct Deposit

Direct Deposit records are employee specific, not district specific.

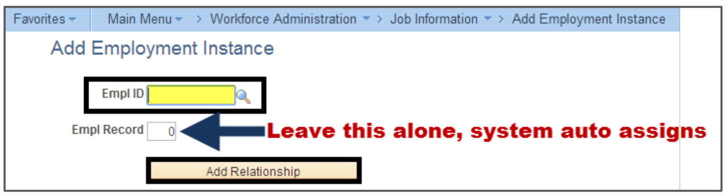
- ☐ Effective Date
- ☐ Status
- ☐ Bank ID
- ☐ ~~Add a New Bank~~ **(DO NOT CLICK – Not Used)**
- ☐ Prenotification Required
- ☐ Account Type
- ☐ Deposit Type
- ☐ Net Pay Percent
- ☐ Net Pay Amount
- ☐ Priority
- ☐ Account Number
- ☐ Attach Form

Add an Employment Instance

The purpose of this section is to show you how to hire an employee that already exists in the PeopleSoft system but is currently working or has worked in a district and does not meet the Transfer rules.

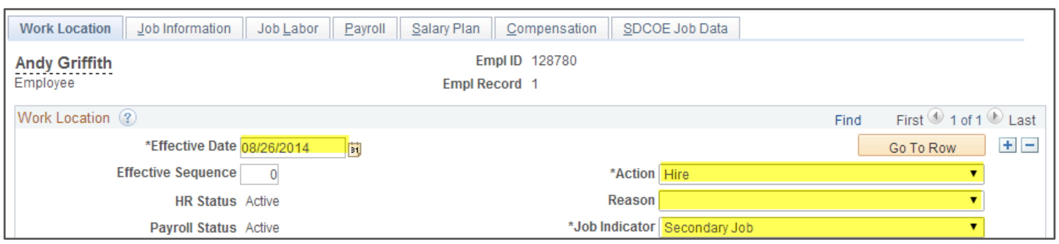
Navigation: Main Menu > Workforce Administration > Job Information > Add Employment Instance

1. Navigate to **Main Menu > Workforce Administration > Job Information > Add Employment Instance**.
2. Enter the **Empl ID**. Click **Add Relationship**.



NOTE: The **Empl Record** will default to the next in list, **do not touch this number**. For example, if the person has three existing jobs, this will default to 4.

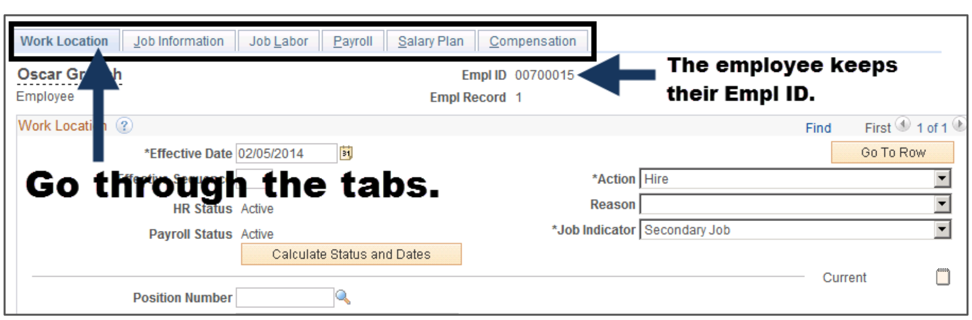
3. On the **Work Location** tab, enter the following fields:



- **Effective Date:** Enter the date of the employee's first day of work (start date). This date can be future dated.
- **Action:** Select *Hire* (default).
- **Reason:** Select the appropriate value. The reason defines the type of action taking place.
- **Job Indicator:** Select *Primary Job* or *Secondary Job*.

IMPORTANT! An employee cannot have more than one primary job. Since this employee has been previously employed by another district, chances are they already have a primary job. Therefore, you will need to contact the other district or SDCOE CRC to coordinate which Job will be marked as Primary. This affects Compensation and Benefits.

4. Refer to ***Error! Reference source not found.*** on p.**Error! Bookmark not defined.** to complete the six tabs.



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New Hire Worksheet

This is a mail merge template used by the CRC. Brackets << >> indicate a merged field.

Effective Date: «Effective_Date»

National ID (SS#): «National_ID_SS»

Last Name: «Last_Name» **First Name:** «First_Name»

Date of Birth: «Date_of_Birth» **Gender:** «Gender» **Employee ID:** «Employee_ID»

Personal Information

Address	«Address»
Phone Number	**«Phone_Number»**
Email Address	«Email_Address»
Ethnicity	«Ethnicity»

Job #1 Information

Effective Date	«Effective_Start_Date»
Action/Reason	«Action» / «Reason»
Job Indicator	«Job_Indicator»
Position Number	«Position»
Description	«Description»
Empl Class	«Empl_Class»
Absence System	«Absence_System»
Pay Group	«Pay_Group»
Employee Type	«Employee_Type»
Holiday Schedule	«Holiday_Schedule»
FICA	«FICA»
Absence Management Pay Group	«Absence_Management_Paygroup»
Step and Step Entry	«Step» / «Step_Entry»
MCOP and Comp Rate of MCOP	«MCOP» / «Comp_Rate_of_MCOP»

Job #1 Time Reporter Data Information

Effective Date	«Effective_Date1»
Time Reporter Type	«Time_Reporter_Type»
Elapsed Time Template	«Elapsed_Time_Template»
Time Period ID	«Time_Period_ID»
Workgroup	«Workgroup»
Taskgroup	«Taskgroup»

Job #2 Information

Effective Date	«Effective_Start_Date»
Action/Reason	«Action» / «Reason»
Job Indicator	«Job_Indicator1»
Position Number	«Position_Number»
Description	«Description1»
Empl Class/	«Empl_Class1»
Absence System	«Absence_System1»
Pay Group	«Pay_Group1»
Employee Type	«Employee_Type1»
Holiday Schedule	«Holiday_Schedule1»
FICA	«FICA»
Absence Management Pay Group	«Sheet»
Step and Step Entry	«Step1» / «Step_Entry1»

Job #2 Time Reporter Data Information

Effective Date	«Effective_Date3»
Time Reporter Type	«Time_Reporter_Type1»
Elapsed Time Template	«Elapsed_Time_Template1»
Time Period ID	«Time_Period_ID1»
Workgroup	«Workgroup1»
Taskgroup	«Taskgroup1»

Payroll Information

Additional Pay Earnings Code	«Additional_Pay»
Flat Amount	«Flat_Amount»
General Deduction Code	«GenDed»
Tax Witholdings Federal & State	«Tax_Withholdings»
Bank Routing # (Net Pay) Checking	«Bank_Routing1»
Account Number	«Account_Number»
Bank Routing # (Flat Amount) Savings	«Bank_Routing»
Account Number	«Account_Number1»
Amount	«Amount»

Benefit Enrollment Information

Dependent Information

National ID (SS#): «National_ID_SS1»

Last Name: «Last_Name1» First Name: «First_Name1»

Date of Birth: «Date_of_Birth1» **Gender: «Gender1»**

Medical	*Enter the coverage of your choice (Empl + Spouse)*
Dental	*Enter the coverage of your choice (Empl + Spouse)*
Vision	*Enter the coverage of your choice (Empl + Spouse)*
Life	*If you offer Life, select a value*
LTD	*Waive*
Legal Services	*Waive*
Employee Assistance Program	*Waive*

TSA election (set-up on savings plan screen)

403(b)	*Add a $200.00 election with the investment option of your choice effective 12/1/2016*

Voluntary Benefit Deductions (set-up as general deductions)

Supplemental/ Voluntary Life Insurance	*Add one of these*
Disability Insurance	