


Finding HR Information in the HCM* System

IF YOU'RE LOOKING FOR . . .	NAVIGATE AS FOLLOWS . . .	FIELDS TO NOTE . . .	COMMENTS . . .
<p>About the "Effective Date" field - A lot of information in the HCM system is effective-dated such that you can view not only current information, but also historic and future-dated information. For example, you can view not only an employee's current department, title, and address, but also the employee's past departments, titles, and addresses. When you first display information on a page, you are looking at the highest dated information (usually current, but possibly in the future), so effective dates are very important.</p>			
Academic Posts and Special Titles	<ul style="list-style-type: none"> Workforce Development > Faculty Events > Track Events > Administrative Posts 	Administrative Post From Date & End Date Department <i>(for joint Faculty appointments)</i> Comments	Titles for special academic appointment (such as chairs and professorships), and special titles for other staffs (see Comments field).
Additional Pay	<ol style="list-style-type: none"> Payroll for North America > Employee Pay Data USA > Create Additional Pay To see account code, if applicable, click tiny triangle on Job Information blue bar and scroll down to Combination Code. 	Earnings Code Effective Date/End Date Earnings Hours <i>(for vacation pay)</i> Goal Amount Combination Code	For example, for paying vacation (at termination), staff education reimbursement, short-term professional payments. Account code is available in the Combination Code field.
Addresses	<ol style="list-style-type: none"> Workforce Administration > Personal Information > Modify a Person Click the Contact Information tab. 	Address Type As Of Date Address	Home/Local - Primary address for tax and mailing purposes Mailing - Alternate address for mailings, such as a PO box Campus - Address for delivery of paychecks and campus mail (derived from mail drop code on Job/Work Location page) Office Location - Address of employee's office and phone
Allowances <i>(DOF only)</i>	<ul style="list-style-type: none"> Workforce Administration > Job Information > Business Expenses 	Change Date/Expense Code Expense Amount Business Purpose <i>(account)</i>	Institutional Allowances and Moving Allowances
Benefits-Eligibility	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Click the Job Information tab. 	Regular/Temporary (Benefits Eligibility) Hours Worked per Week Full-/Part-Time	Regular=benefits eligible Temporary=non-benefits eligible Also click "Benefits Program Participation" to see if person is eligible for J1 Health Plan.
Birthdate	<ul style="list-style-type: none"> Workforce Administration > Personal Information > Modify a Person 	Date of Birth	
Citizenship	<ul style="list-style-type: none"> Workforce Administration > Personal Information > Citizenship > Identification Data <i>(or)</i> Workforce Administration > Personal Information > Modify a Person (see "Citizenship/Passport") 	US Citizenship Status Country of Citizenship	
Committees <i>(Faculty only)</i>	<ul style="list-style-type: none"> Workforce Development > Faculty Events > Track Events > Review Committee Membership 	Committee Role Start Date/End Date	University Committees on which faculty members have served/ are serving
Compensation	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Click the Compensation tab. 	Compensation Rate <i>(per pay rate)</i> Pay Frequency <i>(biweekly or monthly)</i> Annual Base Salary Hourly	Salary per pay period, per year, and per hour. <i>(See also 'FTE Compensation.'</i>) Frequency is either biweekly (nonexempt staffs) or monthly (exempt staffs).
Department	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Make sure the Work Location tab is displayed. 	Department Code and Description Department Entry Date Location	Department Entry Date represents the last date on which the department number changed for this employee.

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Education and Degree(s)	<ol style="list-style-type: none"> 1. Workforce Development > Profile Management > Profiles > Person Profiles 2. The person's education summary should display by default. If it doesn't, click the Education link in the blue bar. 	Degree Degree code	For more detail, click the printer link  at the bottom of the Profile page. A printable summary report of the person's entire Profile will open in a new web browser screen. Additional degree information displayed in the report will include: <ul style="list-style-type: none"> • Date of degree • School country • School name • Highest degree indicator • If appropriate, an override that changes or expands the degree listing in the Register from the default (highest degree earned)
Email Address	<ol style="list-style-type: none"> 1. Workforce Administration > Personal Information > Modify a Person 2. Click the Contact Information tab. 	Email Type (Campus, Home, and so on) Email Address	Campus email addresses are assigned by the University for all new hires.
Emergency Contact	<ol style="list-style-type: none"> 1. Workforce Administration > Personal Information > Personal Relationships > Emergency Contact (see "Navigation Caveat" in Comments) 2. (optional) Click the Other Phone Numbers tab. 	Contact Name Relationship (to Employee) Address/Phone	<i>Navigation Caveat:</i> If you don't see the menu item in the body of the screen, check the left menu bar. Also see the Emergency Contacts report in the HR Information Warehouse.
Employee ID	<ol style="list-style-type: none"> 1. Open a search page, available from many menu items, such as Workforce Administration > Personal Information > Modify a Person. 2. Enter employee's name, and click Search. 		After the search an ID number for the employee (called ID, EmplID, or Person ID) appears (top right corner of screen).
Employment Dates	<ol style="list-style-type: none"> 1. Workforce Administration > Job Information > Job Data 2. Scroll down and click the Employment Data link. 	Original Start Date Last Start Date Termination Date Company Seniority Date Benefits Service Date	Last Start Date = Latest Hire/ Rehire Date Company Seniority Date & Benefits Service Date show benefits-eligible years of service.
Ethnicity	<ol style="list-style-type: none"> 1. Workforce Administration > Personal Information > Modify a Person 2. Click the Regional tab. 	Ethnic Group	To view multiple rows for multi-ethnic employees, click the View All link near the right-hand corner of the navigation header.
Expected Job End Date	<ul style="list-style-type: none"> • Workforce Administration > Job Information > Job Data 	Expected Job End Date	Workflow managers are notified of upcoming expected job end dates via email.
Field of Specialization (Faculty only)	<ol style="list-style-type: none"> 1. Workforce Development > Profile Management > Profiles > Person Profiles 2. Make sure the Education section is displayed. 	Areas of Study	Faculty member's field of specialization (if available)
FTE	<ol style="list-style-type: none"> 1. Workforce Administration > Job Information > Job Data 2. Click the Job Information tab and scroll down to the Standard Hours section. 	Standard Hours (weekly) FTE	Full-Time Equivalent (FTE) is percentage of time worked by a staff member, represented as a decimal. For example, an 80% employee working 10 out of 12 months has an FTE of .66667.

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FTE Compensation	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Click the FTE Compensation tab. 	FTE Salary Chg Amt Chg % Actual Pay Periods Base Pay Periods Per Year Duty Time Base Salary <input type="checkbox"/> Faculty Purchase	Annual salary, duty time, number of pay periods worked per year. For a part-time employee, FTE salary is salary that <i>would</i> be paid if full-time. (See also 'Compensation.')
Grade	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Click the Salary Plan tab. 	Salary Admin Plan Grade Grade Entry Date	Employee's grade/rank. Grade Entry Date shows Date to Rank: date of last change to grade.
Hourly Rate	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data. Click the Compensation tab. 	Hourly Rate	
I-9 Data	<ul style="list-style-type: none"> Workforce Administration > Job Information > Princeton Data > I9 Data 	I-9 Status	Displays 'ok to pay' if Employment Eligibility Verification I-9 Form has been processed.
Incumbent Position History	<ul style="list-style-type: none"> Organizational Development > Position Management > Review Position/Budget Info > Position History 	EmplID Name Position Entry Date/End Date Exit Reason	Displays all incumbents of the position since 2001 (including current one). No name is displayed for new, vacant positions.
Job Earnings Distribution	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Scroll down and click the Earnings Distribution link. Job Earnings Distribution page is displayed. 	In Job Earnings Distribution: Earn Code Compensation Rate Distrib %	Provides a break-out of earnings by type if on leave or paid other than through regular salary
Job and Title Information	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data Click the appropriate tab: <ul style="list-style-type: none"> * Click the Job Information tab for job code and title. * Click the Work Location tab for position number and title (HR/PPPL only). 	Job Code and Description Employee Class Job Function FLSA Status (click USA flag) Position Number and Title	Employee Class is a grouping for benefits eligibility purposes.
Job Notes	<ol style="list-style-type: none"> Workforce Administration > Job Information > Job Data On the Work Location page, click the Notepad  icon (upper right of Sequence field). The Job Data Notepad page is displayed. To view a comment, click text in the Subject line. 	Subject Note Text	Job Notes contain comments related to the job action for the specified effective date.
Job Summary	<ul style="list-style-type: none"> Workforce Administration > Job Information > Review Job Information > Workforce Job Summary 	Five-tab summary of employee's job, department, action/reason, status, and grade history. To show data from all tabs in one row, click the Show All Tabs icon to the right of the tabs.	
Marital Status	<ul style="list-style-type: none"> Workforce Administration > Personal Information > Modify a Person 	Marital Status (under Biographical History)	
Military Status	<ol style="list-style-type: none"> Workforce Administration > Personal Information > Modify a Person Click the Regional tab. 	Military Status	
Name(s)	<ul style="list-style-type: none"> Workforce Administration > Personal Information > Biographical > Additional Names 	Type of Name Name	Lists employee's current and previous names. 'Primary' is legal name (Social Security card) used for payroll/taxes. 'Preferred' is professional, accented, or nick name.

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Paycheck Summary	<ol style="list-style-type: none"> 1. Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary 2. Specify the EmplID to show list of employee's paychecks, organized by pay group and date. 3. Click on the paycheck you need to review. 		To view an employee's current or past paycheck detail: earnings, taxes, deductions, and net pay.
Pay Group	<ol style="list-style-type: none"> 1. Workforce Administration > Job Information > Job Data 2. Click the Payroll tab. 	Pay Group Employee Type Tax Location Code	
Personal Data	<ul style="list-style-type: none"> • Workforce Administration > Personal Information > Modify a Person 	The Personal Data page group comprises three pages: Biographical Details, Contact information, and Regional.	
	For biographical details: <ul style="list-style-type: none"> • Make sure the Biographical Details tab is displayed. 	Name Display (First Last) Date of Birth Gender/Marital Status National ID (SSN) US Citizenship Status Country of Citizenship	
	For address and phone information: <ul style="list-style-type: none"> • Click the Contact Information tab. 	Home/Local Address Campus Mail Address Office Location 1 Telephone (Home/Local & Office Location 1) Email Address <i>(Campus type)</i>	Home/Local - Primary address for tax and mailing purposes Campus - Address paychecks and campus mail Mailing - Alternate destination for mail, such as a PO box Office Location - Address of an employee's office and phone
	For ethnicity and military status: <ul style="list-style-type: none"> • Click the Regional tab. 	Ethnic Group Military Status	For multiple rows (multi-ethnic), click View All link (in top right).
Position Data	<ul style="list-style-type: none"> • Organizational Development > Position Management > Maintain Position/Budgets > Add/Update Position Info 	Each HR/PPPL regular employee is associated with a position with core attributes, such as job code, full/part-time, title, department, and supervisor data. Positions may be filled or vacant. Dated position activity and history can be viewed here.	
	For position data: <ol style="list-style-type: none"> 1. Make sure the Description tab is displayed. 2. If necessary, scroll down the page to find the desired part. 	Position Information Part Position Number Headcount Status Current Head Count Effective Date/Status Reason/Action Date	Action Date represents the date on which the data was entered.
		Job Information Part Business Unit Job Code and Description Manager Level Full/Part Time/Union Code Position Title/Short Title	For HR/PPPL exempt staff, the Title is used, by default, in the Register and online directory.
		Work Location Part Department/Reports To	
		Salary Plan Information Part Salary Admin Plan/Grade Standard Hours FLSA Status <i>(click on USA flag)</i>	
	Click the Duty/Number of Pays tab	Duty time/Actual Pay Periods Base Pay Periods	
Click the Specific Information tab	Click the tiny arrow to the left of "Education and Government" on the blue bar to see the FTE for this position. <i>(For definition, see 'FTE'.)</i>		

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	Click the Budget and Incumbents tab	EmplID Name	If the position is filled, values for current incumbent are shown.
	Click the PU Supervisors tab	Departmental Office Head	For office head mailings
		Faculty Voting	For faculty voting mailings
		Salary Supervisor	Departmental lead for merit increase process
		Manager Level	Manager's level
	Home Organization Demographic	HOD (<i>PPPL only</i>)	
Position Data Summary	• Organization Development > Position Management > Review Position/Budget Info > Position Summary	A "history at a glance" summary, presented on three tabs: General, Work Location, and Payroll Information.	
Position Incumbent History	See ' <i>Incumbent Position History.</i> '		
Position Number <i>(for HR or PPPL only)</i>	• Workforce Administration > Job Information > Job Data.	Position Number	
Recommendation Status <i>(for DOF staff only)</i>	• Workforce Administration > Job Information > Princeton Data > Recommendation Status	Date Received Entered By Department Decision Final Action	Appointments received by DOF, plus subsequent approval and processing status
Register Titles	• Workforce Development > Faculty Events > Track Events > Administrative Posts	Administrative Post (Type) From Date/End Date Comments	See Princeton University online directory for current complete title. Also see ' <i>Academic Posts and Special Titles.</i> '
Salary	See ' <i>Compensation</i> ' and ' <i>FTE Compensation.</i> '		
Secondary Appointment <i>(or Other Appointment)</i>	1. Workforce Administration > Job Information > Job Data 2. Click the appropriate tab (Work Location, Job Information, Job Labor, Payroll, Salary Plan, FTE Compensation, Compensation) for desired data.	If an employee has an Empl Rcd #1, then they have or have had a second job or appointment as: 1) a faculty purchase; 2) a post-retirement non-benefits-eligible hire; and/or 3) a secondary staff position, usually half-time.	
Status	1. Workforce Administration > Job Information > Job Data 2. Make sure the Work Location tab is displayed.	Status Action Reason Job Indicator	Latest job activity is displayed (also see note at top of first page about effective dating)
Telephone Number	1. Workforce Administration > Personal Information > Modify a Person 2. Click the Contact Information tab.	Phone Type (such as Home/ Local, Mobile, and so on) Telephone	
Tenure Status	1. Workforce Administration > Job Information > Job Data 2. Make sure the Work Location tab is displayed.	<input type="checkbox"/> Tenure Flag	If the Tenure Flag box is checked, the faculty member has tenure.
Title	See ' <i>Job and Title Information.</i> '		
Union Data	1. Workforce Administration > Job Information > Job Data 2. Click the Job Labor tab.	Union Code Union Seniority Date	
Visa/Permit Data	1. Workforce Administration > Personal Information > Citizenship > Identification Data 2. Make sure Citizenship/Passport tab is displayed.	Passport Number Issue Date/Expiration Date	
Work Location	See ' <i>Department.</i> '		

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FREQUENTLY ASKED QUESTIONS	
When is the system available?	Daily, from 7:00 a.m. to 11:59 p.m. Note: The system is offline, for routine maintenance, every night from midnight to 7:00 a.m.
How can I get hotline help? When?	Call the OIT Help Desk at 609-258-4357 (8-HELP). For help with <i>accessing</i> the system, call at any time. For help with <i>using</i> the system, call only during business hours, and select option 3.
How do I log in?	<ol style="list-style-type: none"> From the Princeton home page, navigate to Administration & Services > Business Systems > PeopleSoft Administrative Systems. On the PeopleSoft Administrative Systems splash page, click the LOG IN HERE link. Enter your NetID in the User ID field; your LDAP password in the Password field. Both are case-sensitive.
How do I log out?	<ol style="list-style-type: none"> Click the Sign out link in the upper-right corner. Always use the Sign out link before you close your browser to avoid problems. Close your browser to safeguard your privacy.
How do I retrieve one record or a list of records?	<p>On the Find an Existing Value page:</p> <ol style="list-style-type: none"> Enter as many search criteria as possible; both full and partial values are valid. The more criteria you enter, the faster the search and the more specific the results. To retrieve a single record, enter an EmplID or name. To search by first and last name, enter all or part of the first name in the Name field and all or part of the last name in the Last Name field. Note: Use the percent sign (%) wildcard to match one or more characters, and the underscore (_) wildcard to match any single character. To view historical rows in addition to current and future-dated rows, select <input type="checkbox"/> Include History <i>Include History</i>. Click the Search button. A list of possible matches is displayed in the Search Results area of the Search page. If your search criteria are not sufficient to limit the results to a single record, a list will be returned and displayed at the bottom of the screen under the Search Results heading. These results can often be sorted by clicking the appropriate header or you can work through the list. (<i>For instructions, see the following row.</i>) Locate the record you want to view, and open it by clicking any of its links.
How do I work through a search list?	Once you are on the results screen, you can navigate from person to person returned in your Search results by using the search list buttons at the bottom of each page: Previous in List Previous in List , Next in List Next in List , and Return to Search Return to Search . If the Previous in List Previous in List or Next in List Next in List button is disabled, you're viewing the first or last record, respectively, in the list. Click the Return to Search Return to Search button to return to the search results on the Find an Existing Value page. There you can scroll through the generated list of records, select a particular record in the list, or perform another search.
How do I use the navigation header to find specific rows of data?	<p>The navigation header is a horizontal bar that appears across the top of some sections of PeopleSoft pages.</p> <p>The diagram shows a navigation header with buttons: Find View All First 1-2 of 9 Last. Arrows point from text labels to these buttons: 'Search for a specific value' points to 'Find'; 'Display the first or last row of the entire set' points to 'First' and 'Last'; 'Display multiple rows on one page' points to 'View All'; 'Scroll forward or backward, one row at a time' points to '1-2 of 9'.</p>
How do I: —Return to Home? —Add pages to My Favorites Menu? —Log out of PeopleSoft? —Get online help? —Open extra PeopleSoft windows?	<p>Click to add a page to the My Favorites menu, where it can be accessed later.</p> <p>Click to log out of your PeopleSoft session.</p> <p>The diagram shows a navigation header with buttons: Home Add to Favorites Sign out. Below it are: New Window Help hcm. Arrows point from text labels to these buttons: 'Click to return to the screen displayed when you logged in' points to 'Home'; 'Click to open a new window for display of additional PeopleSoft pages' points to 'New Window'; 'Click for help' points to 'Help'; 'Click to log out of your PeopleSoft session' points to 'Sign out'.</p>

