

PeopleSoft: Human Resources



HR Updates User Guide *DOF*



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Determining How to Hire

This chapter will guide you through the multi-step process of hiring or rehiring a Princeton University employee. The process begins with a search of existing records, and ends with the entry of a new or updated record in the PeopleSoft Human Capital Management (HCM) system.

A hire or rehire can be triggered when:

- The Office of the Dean of the Faculty (DOF) receives or approves the appointment of a regular or visiting faculty/staff member (requires an Appointment Recommendation form and supporting documents).

Overview of the Hiring Process

This section explains why searching Campus Community is an important part of the hire process, how the Campus Community search will help you choose the right hiring procedure, and what special considerations apply if you are hiring a Princeton University student.

Is the prospective hire part of the campus community?

Before you start the process of entering hire data, you must search the entire database to determine whether the person to be hired is already affiliated with Princeton University (see “Searching for a Person” on page 6).

Anyone who is affiliated with Princeton University, either as an employee or as a non-employee, is registered with an ID in the PeopleSoft database. University affiliations include:

- Employees
- Student applicants and prospects
- Students
- Alumni
- Kin of students or employees
- Library patrons
- Miscellaneous affiliates such as consultants, special students, summer fellows, and docents, among others.

Your search of the entire database is important for these reasons:

- To prevent duplicate records from being added.
- To determine hire eligibility if a person is already in the database.

When You Find Someone in the database...

When you find a person in the database, make sure you note the person’s identification number (*ID*). The ID is the first thing you will enter when you begin the hire process in HCM.

Also, be sure to review and update the personal data. This will ensure that benefits and payroll defaults are assigned correctly to the person. Update the personal data in the Personal Information menu group, and then enter the job data. For more information, see the appropriate procedures in this chapter.

Choosing the Right Hiring Procedure

The outcome of your search in Campus Community determines how you will choose a hiring procedure.

Not Found in the Database

If you do *not* find a record for the prospective hire already in the database, you have determined that the person is eligible to hire.

- For a Dean of Faculty (DOF) appointment, add the person to the database as a Person of Interest (DOF Affiliate), and then add a recommendation record to establish the person as a pending hire awaiting approval (see “Starting a DOF Hire Pending Approval of the Recommendation” on page 20).

Found in the Database

If you find a record for the prospective hire already in the database, you need to check further to determine hire eligibility and decide on the right hiring procedure:

- First, you will need to make sure the person is not an active student, and that there are no conflicts between multiple affiliations (see “Checking University Affiliation(s)” on page 10).
- Second, for an existing or former employee, or for a retiree, you will need to check the employee record to determine whether the person is eligible to be hired (see “Checking the Employee Record Number” on page 15).

After checking the person’s University affiliation(s) and, if applicable, the employee record number, you will have the information you need to choose the appropriate hire procedure.

Because a University record already exists for the individual, you will use either the **Add Employment Instance** or **Job Data** menu option to enter the job information. Keep in mind, however, that you must review and update the personal data first to ensure that benefits and payroll defaults are assigned correctly to this person when they are hired.

For a Dean of Faculty (DOF) appointment, first add a recommendation record to establish the person as a pending hire awaiting approval (see “Starting a DOF Hire Pending Approval of the Recommendation” on page 20). Then continue with the appropriate procedure:

- For a new DOF employee, see “Adding an Employment Instance for a DOF New Hire” on page 36.
- For a rehire into a DOF appointment, see “Rehiring into a DOF Appointment” on page 45.
- For a retiree being hired into a non-benefits-eligible part-time DOF appointment, see “Hiring a DOF Retiree into a Part-Time Appointment” on page 55.



Note: See the procedures in “DOF Secondary Appointments (Faculty Purchase)” on page 101, if you are hiring a non-faculty employee into a DOF secondary appointment.

Hiring a Student

At the time of enrollment, each undergraduate or graduate student is “hired” by Princeton University as a student employee. Undergraduates are automatically loaded into the system on *Empl Rcd Nbr 60*, and graduate students on both *Empl Rcd Nbr 50* (monthly) and *51* (biweekly). This allows the university to pay individual students for any work done as a student employee during undergraduate or graduate years.

Because of their student employee status, active students are not eligible to be hired into a non-student faculty or staff position. Active students include undergraduates, graduate students, post-enrolled fellows, and graduate students on leave of absence.

Coordinate with the student office if you are hiring someone with an active student status into a non-student job or position. In most cases, you must ensure that the person has graduated, or that the person’s student status has changed to inactive, prior to the effective date of hire.



Note: Undergraduate and graduate student hires and job/status changes are loaded electronically on a nightly basis.

Hiring Other Persons of Interest (POI-9)

Persons of Interest can include a variety of people, such as kin, alumni, and student applicants. Some are eligible for hire but others, such as Undergraduate applicants, require contacting the office responsible for that group first for approval. See “Checking University Affiliation(s)” on page 10 for guidance.

Searching for a Person


Follow these steps to determine whether a person has an existing affiliation with Princeton University. A person can be affiliated as an employee or non-employee (for example, a non-employee student, alumna/alumnus, library patron, or kin to a university affiliate).



Important! You may not find a matching record when you search by name, so you must perform separate, unique searches using the person's birth date and Social Security number (Step 8 and Step 9). These additional searches are important because people change their names (for example, following marriage or divorce).



To search for an individual:

1. Select **Workforce Administration > Personal Information > Add a Person**.
2. On the Add Person page, click the [Search for Matching Persons](#) link.
3. The *Search Result Code* field should show a default value of **PU_HCM_RESULTS**. If you have not set this default,
 - a) Click the [User Default](#) link below the *Search Result Code* field.
 - b) On the Default Search Result page, use the Lookup  button to display the available search result codes.
 - c) Select **PU_HCM_RESULTS**.
 - d) Click OK to return to the Search Criteria page.

Search 1—by name:

4. To search for the person by name, enter both *First Name* and *Last Name* criteria on the Search/Match page.

You can choose one of two methods:

- To search using key letters of the last name (recommended method to avoid spelling errors):
 - a) Type up to the first two characters of the *First Name*. You do not need to capitalize.
 - b) Type up to the first three characters of the *Last Name*.

- c) Press the Tab key. (Entered values will change to upper case.)



Important! You **must** press the Tab key to activate the corresponding Selective Search option.


- d) Scroll to the bottom of the page. In the Search by Order Number area, the button next to **Name Only** will be highlighted.
- e) Click the **Selective Search** button next to **Name Only** to start the search. Regardless of how many characters you specified, the search will be limited to the first three characters of the last name and the first two characters of the first name.

Tip! If your search criteria match only one of the selective search combinations, you can use the Search **Search** button at the top of the page, above the Search Criteria header. If your search criteria match multiple selective search combinations and you use the Search **Search** button at the top of the page, the system will use the most restrictive of the available searches.

5. After search processing, the system either displays the Search Results page, or if no matching record was found, a message box that says “Search Criteria did not return any results”.

If matching records were found, the first twenty records are displayed.

The Search Results Summary above the list of matching records indicates how many records (Number of IDs) were found. To determine whether there are additional records, and to view all records:

- a) Scroll right until you see the record count in the header bar.
 - b) If the count is less than 100, for example, **1-20 of 58**, click the [View All](#) link. Scroll down to view all the records.
 - c) If the count is more than 100, for example, **1-20 of 258**, click the [View 100](#) link.
 - Scroll down to view all of the first 100 records.
 - After you view the first 100 records, scroll to the top of the page and click the right arrow  in the header bar to display the next set of 100 records. Repeat for additional sets of 100.
6. If known, you can specify gender as an additional search criteria to cut down the number of records displayed:




Note: You must enter the full last name to use the “Name, Gender” search.

- a) Click the [Return to Search Criteria](#) link to return to the Search page.
 - b) For *Gender*, type **F** or **M** (must be upper case).
 - c) Press the Tab key, and scroll to the bottom of the page.
 - d) Click the Selective Search button next to **Name, Gender**. The top twenty matches are displayed on the Search Results page.
 - e) Scroll to view all matching records, as described in Step 5.
7. When you are satisfied with the search results, use the following fields on the Results1 tab to determine whether you have a match:
- Full Name
 - Gender
 - National ID (last 4 characters)
 - Name Type
 - Date of Birth (in month/day format)

You can also use the Results2 tab to see the current primary university affiliation.




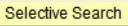

Tip! To see the Results1, Results2, and Additional Information tabs on a single page, click the Show All Columns  button to the right of the tabs.

To investigate further,


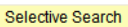

- you can display more detailed personal information by clicking the [Detail](#) link. This opens a separate window showing the Person Data page group (Biographical Details, Addresses, and Regional). Close the window to return to the Search Results page.
- Except for undergraduate applications and prospects, you can display more detailed information about the person's university affiliations by clicking the [Affiliation](#) link. This opens a separate window showing the Affiliation page. Close the window to return to the Search Results page.

Search 2—by birthdate:


8. If the search by name does not find a matching record for the person, start a new search using **only** the birth date:
 - a) Click the [Return to Search Criteria](#) link to return to the Search page.
 - b) Click the Clear All Clear All button to clear all previously entered values.

- c) Type the person's *Date of Birth* in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
- d) Press the Tab key, and scroll to the bottom of the page.
- e) Click the Selective Search  button next to **Birthdate Only**, or the Search  button at the top of the page.
- f) Repeat Step 5 and Step 7.

Search 3—by social security number:

9. If the search by birth date does not find a matching record for the person, start a new search using only the Social Security number:
 - a) Click the [Return to Search Criteria](#) link to return to the Search page.
 - b) Click the Clear All  button to clear all previously entered values.
 - c) In *National ID*, type the United States Social Security number without dashes (for example, **222885555**).
 - d) Press the Tab key, and scroll to the bottom of the page.
 - e) Click the Selective Search  button next to **SSN Only** or the Search  button at the top of the page.
 - f) Repeat Step 5 and Step 7.



Important! If you find a record for the person, use the Carry ID  button to carry the ID over to the next page you open, or make a note of the person's ID. The ID is the first thing you will enter when you begin the hire process in HCM.

Related Procedures:

If you have **found** a matching record:

- See “Checking University Affiliation(s)” on page 10.

If you have **not found** a matching record:

- See “DOF Faculty and Academic Professionals: Recommendation/Hire Process” on page 18.

Checking University Affiliation(s)

If you have found a matching record, follow these steps to determine the person's affiliation with Princeton University. Keep in mind that a person can have more than one affiliation.



To check university affiliations:

1. On the Search/Match Result page under the Results2 tab, locate the columns showing *Affiliation Code*, *Affiliation Group*, and *Affiliation Status*.



Important! For an active student, the primary affiliation is always student (ST). For an active employee, the primary affiliation is usually employee (EM), but in rare cases an employee might also be a student with a primary affiliation ST.

2. If the *Affiliation Status* is **DECS** (deceased), do not proceed.
3. If the *Affiliation Code* is **ST** (student), check to see if the student has an active status. An active graduate (**GR**) or undergraduate (**UG**) student is usually *not* eligible to be hired. A student with an inactive status is eligible to be hired.

Student record numbers are **50** and **51** for a graduate student, and **60** for an undergraduate

If Affiliation Code Is	And Affiliation Group Is	And Affiliation Status Is	Then
ST - Student	GR Graduate Student	ACTV - Active ABSE - In Absentia	Stop. Check other affiliations (Step 7) and coordinate with the student office before proceeding.
		APPL - Applicant LEAV - On Leave NSHO - No Show PROS - Prospect TERM - Terminated	OK to hire. See “Starting a DOF Hire Pending Approval of the Recommendation” on page 20.
		DECS - Deceased	Stop. Not eligible to hire.
	UG Undergrad	ACTV - Active BRDG - Bridge Year	Stop. Check other affiliations (Step 7) and coordinate with the student office before proceeding.
		APPL - Applicant PROS - Prospect	Stop. Check other affiliations (Step 7) and coordinate with the Admissions Office (Glenn Wemple) before proceeding.
		INAC - Inactive	OK to hire but must notify Registrar’s Office (Amy Hughes). See “Starting a DOF Hire Pending Approval of the Recommendation” on page 20.
		NSHO - No Show	OK to hire. See “Starting a DOF Hire Pending Approval of the Recommendation” on page 20.
		DECS - Deceased	Stop. Not eligible to hire.

4. If the *Affiliation Code* is **EM** (employee), the person is eligible to be hired into a concurrent position, or rehired if the *Affiliation Status* is terminated or retired. Be sure to check possible conflicts in affiliation and the employee record details before you proceed.

If Affiliation Code Is	And Affiliation Group Is	And Affiliation Status Is	Then
EM - Employee	DF - Dean of the Faculty HR - Human Resources PPL - Plasma Physics Lab	ACTV - Active LEAV - On Leave RETR - Retired TERM - Terminated	OK to proceed. Check other affiliations (Step 7) and then continue with “Checking Employee Record Number. (If this is a second job, coordinate with the DOF, HR, or PPL office.)
		DECS - Deceased	Stop. Not eligible to hire.

5. If the *Affiliation Code* is **DF**, the person is eligible to be hired by the Dean of Faculty’s office. In many cases, a **DF** affiliation indicates a pending hire. The person might already be employed on a temporary basis awaiting approval of an appointment.

If Affiliation Code Is	And Affiliation Group Is	And Affiliation Status Is	Then
DF - DOF Prehire	DF - Dean of the Faculty	ACTV - Active	OK to hire after approval. Check other affiliations (Step 7). Other offices must coordinate with the Dean of Faculty office before hiring.
		INAC - Inactive	OK to proceed. Either DOF or any other HR Office may hire.

6. For other affiliations, the person is eligible to be hired:

If Affiliation Code Is	And Affiliation Group Is	And Affiliation Status Is	Then
AL - Alumni	GR - Graduate Student UG - Undergrad	ACTV - Active	OK to hire. See “Starting a DOF Hire Pending Approval of the Recommendation” on page 20.
		DECS - Deceased	Stop. Not eligible to hire.
KN - Kin	SV - Survivors (retiree survivors who retain university medical benefits and are on the 8 record)	ACTV - Active	OK to hire in a non-benefits-eligible job on the 0 record; or if hiring into an employee benefits-eligible job, then work with HR so that survivor JOB record is temporarily closed before hiring.
		TERM - Terminated	OK to hire. See “Starting a DOF Hire Pending Approval of the Recommendation” on page 20.
		DECS - Deceased	Stop. Not eligible to hire.
	All others	ACTV - Active INAC - Inactive	OK to hire. See “Starting a DOF Hire Pending Approval of the Recommendation” on page 20.
		DECS - Deceased	Stop. Not eligible to hire.
	MS - Misc	SL - Special Student All others	ACTV - Active INAC - Inactive
DECS - Deceased			Stop. Not eligible to hire.

7. To check for potential conflicts in affiliation:
 - a) Click the [Affiliation](#) link at the start of the record line.
 - b) On the Affiliation page:
 - A **Y** identifies the *Primary* affiliation for the person.
 - If the primary affiliation is not **EM**, make sure there is no other **EM** affiliation with a *Status* of **Active** or **On-Leave**.
 - If the primary affiliation group is **UG** and the *Status* is not **Active**, make sure the person does not have an active **GR** affiliation status (**Active** or **Post-Enrolled Fellow**).

Related Procedure:

- For an active employee (Step 4), see “Checking the Employee Record Number” on page 15.

Checking the Employee Record Number

Follow the steps in this procedure when you have found a matching record, and have determined that the person's primary affiliation is **EM** (employee).

An employee can have more than one job or employee record number. In this case, you must determine whether the person is eligible to be hired into a particular job, and whether to process the hire on record **0** or record **1**.

What is the difference between record **0** and record **1**?

Record **0** is the *primary* employee job record (non-student) used to administer all salary and benefits.

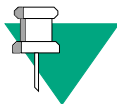
Record **1** is a *secondary* employee job record. If the employee has a record **1** in addition to the primary record **0**, then the employee is a:

- Part-time faculty member in a Dean of Faculty (DOF) secondary appointment (faculty purchase).
- DOF retiree in a part-time appointment.

Record **8** is used solely for *surviving spouses* of retirees who are receiving their health benefit coverage from Princeton University.



To check the employee record number:



Note: The **0** record for a retiree is used to identify the retiree status, and to administer benefits.

1. On the Search Results page, click the [Affiliation](#) link to the left of the person's name.



Important! Before you view *Details*, check to see if there are other *EM* affiliations for this person besides the primary. If yes, make sure the non-primary *EM* affiliations are **Inactive** or **Closed**.

2. On the Affiliation page, click the [Details](#) link for the primary **EM** affiliation (marked **Y** in the *Primary* column).
3. On the Employee Detail page:
 - In the *Empl Rcd Nbr* column:
 - Zero (**0**) identifies the primary employee job record.

- One (1) identifies a secondary job record.
 - Records numbered **0** are listed first. As needed, click [View All](#) and scroll to make sure there are no **1** records at the bottom of the list.
 - Both groups of records are listed by *Eff Date*. The most recent **0** record is at the top of the list. After the **0** records, the most recent **1** record is listed first.
4. If there is *only a 0 record number* for the employee, determine hire eligibility as follows:

If Rcd 0 Status Is	And Job to be Hired into Is	Then
ACTV or LEAV	Benefits Eligible	If a regular part-time employee, may be eligible to hire into a second part-time job on record 1 . Otherwise not eligible to hire.
	NOT Benefits Eligible	If a DOF faculty purchase, may be eligible to hire on record 1 . See “DOF Secondary Appointments (Faculty Purchase)” on page 101.
RETR	Benefits Eligible	Not eligible to hire unless retirement benefits are forfeited. In that case, eligible to rehire on record 0 .
	NOT Benefits Eligible	Eligible to hire on record 1 . See “Hiring a DOF Retiree into a Part-Time Appointment” on page 55.
TERM	Benefits Eligible or Not Benefits Eligible	You can rehire on Record 0 . See “Rehiring into a DOF Appointment” on page 45.

5. If there are **both 0 and 1 records** for this employee, determine hire eligibility as follows:

If Rcd 0 Status Is	And Rcd 1 Status Is	And Job to be Hired into Is	Then
ACTV or LEAV	ACTV or LEAV	N/A	Stop. Not eligible to hire because employee already has two jobs.
	TERM	Benefits Eligible	If a regular part-time employee, may be eligible to rehire into a secondary part-time job on record 1 . Otherwise not eligible to hire.
		NOT Benefits Eligible	If a DOF faculty purchase, may be eligible to rehire on record 1 . See “DOF Secondary Appointments (Faculty Purchase)” on page 101).
RETR	ACTV or LEAV	Benefits Eligible	If retirement benefits are being forfeited, coordinate with owner office to terminate record 1 , then rehire on record 0 .
		NOT Benefits Eligible	Stop. Not eligible to hire because already a part-time employee.
	TERM	Benefits Eligible	Not eligible to hire unless retirement benefits are forfeited. In that case, eligible to rehire on record 0 .
		NOT Benefits Eligible	You can rehire on record 1 . See “Hiring a DOF Retiree into a Part-Time Appointment” on page 55.
TERM	TERM	Benefits Eligible	You can rehire on Record 0 . See “Rehiring into a DOF Appointment” on page 45.
		NOT Benefits Eligible	You can rehire on Record 0 .



Important! If your search indicates that the person is not eligible to be hired, contact the applicable Human Resources, Dean of Faculty, or student office before continuing with the hire process.

DOF Faculty and Academic Professionals: Recommendation/Hire Process

The Dean of Faculty (DOF) hire process is triggered when the Office of the Dean of Faculty receives a department recommendation for a faculty or academic professional (for example, researcher, specialist, or librarian) appointment. The recommendation is submitted on the Appointment Recommendation form.

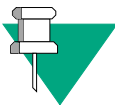
Before a person recommended for a DOF appointment can actually be hired, the department's recommendation must be approved by a dean or an appointed committee. This approval process can take as long as several months or even a year. For this reason, the person being recommended is initially entered into the PeopleSoft system as a pending hire, or "DOF affiliate." After the approval process has been completed, a job data record is created.

The DOF hire process includes.

1. Searching the database

To start the hire process, search the entire database to determine whether the person being recommended already has a record/affiliation (see "Searching for a Person" on page 6).

- If you do not find the person in the database, create a new record for the person (see "Adding a Potential DOF Employee" on page 20).



Note: Prior to hire, the person is given an active affiliation of **DOF Affiliate** in the database. When hired, the person is given an appropriate employee affiliation. If not hired, the DOF affiliation status is changed to **Inactive**.

- If you find the person:
 - Check for any conflict of affiliation (see "Checking University Affiliation(s)" on page 10).
 - Determine whether the person is eligible to be hired (see "Checking the Employee Record Number" on page 15).

2. Adding a Recommendation Pending Approval

After you have searched the database and, as needed, added the person with a POI (Person of Interest) status of **DOF Affiliate**, you will enter preliminary hire data on the Appointment Recommendation page. This establishes the person as a pending DOF hire (see “Adding a DOF Recommendation Pending Hire” on page 28).

3. Updating the Recommendation After Hire

After the approval process has been completed, you will update the Appointment Recommendation page with the final approval status (see “Updating the Appointment Recommendation Page” on page 34).

3. Making the Actual Hire

Finally, you will hire the person using the appropriate procedure:

- “Adding an Employment Instance for a DOF New Hire” on page 36
- “Rehiring into a DOF Appointment” on page 45
- “Hiring a DOF Retiree into a Part-Time Appointment” on page 55



Note: See the procedures in “DOF Secondary Appointments (Faculty Purchase)” on page 101, if you are hiring a non-faculty employee into a DOF secondary appointment.

Starting a DOF Hire Pending Approval of the Recommendation

This section describes how to start the hire process when you first receive a Dean of Faculty (DOF) Appointment Recommendation form. After you have searched the database for the person being recommended, use the appropriate procedure(s):

- For a person not found in the database, see “Adding a Potential DOF Employee” on page 20.
- For all recommended DOF appointments, see “Adding a DOF Recommendation Pending Hire” on page 28.

Adding a Potential DOF Employee

Follow the steps in this section to create a new record for a person recommended for a Dean of Faculty (DOF) appointment. Use this procedure only if you do not find a record for the person in the database.

Before you start this procedure, make sure you have...

- *Searched the entire database (see “Searching for a Person” on page 6) and*
- *Determined that the person is **not** a member of the campus community.*

If the person **is** found with a non-employee affiliation only (i.e., **AL, KN, MS**), you can bypass the Modify a Person page to add the new relationship:


- a) Navigate to **Workforce Administration > Organizational Relationships > Add a POI Relationship**.
- b) Type the *EmplID* and select a *Person of Interest Type* of **00012. (DOF Affiliate)** and click Add.

- c) Follow Step 17, on page 27, to complete the Add a Person of Interest page, using today's date for the date of hire (if it is retroactive).

Note: After adding the POI Type and Recommendation Panel information, proceed with Step 3 to review and update personal data.



To add a potential DOF employee to the database:

1. From the left menu, select **Workforce Administration > Personal Information > Add a Person**.
2. On the Add Person page:
 - a) Make sure *EmplID* defaults to **NEW**.
 - b) Click the [Add the Person](#) link below the Person ID.
3. On the Biographical Details page, in the Name area:
 - a) The *Effective Date* is today's date (the default) unless the effective hire date is earlier than today's date. If earlier, type the actual hire date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.



Tip! You cannot add people with a future date.

- b) Make sure *Format Type* is **English** (default).
- c) Click the [Add Name](#) link.
- d) On the Edit Name page, enter the following values:

Prefix Not used by HCM.

First Name

Middle If, specified, type the middle name, or a middle initial with punctuation (for example, P.).

Last Name Type the name without any suffix.




Tip! The name can include punctuation such as an apostrophe (*O'Connor*) or hyphen (*Jones-Martin*), but not an accent mark. If the name contains an accent mark, you must add a preferred name that includes the accent; see “*Entering an Accent or Special Character in a Name*” on page 241.

Suffix If specified, select the appropriate value from the drop-down list.




Note: If a person indicates that they have only one name, enter this name in both the *Last Name* field, and the *First Name* field. The IRS and the University’s benefits carriers require a value in both fields.

Tip! To verify how the name will be displayed, click the *Refresh Name* button.

Click the OK  button to return to the Biographical Details page.




Note: To specify a professional name, see “*Entering a Preferred Name*” on page 237.

4. In the Biographic Information area, type the person’s *Date of Birth* in *mm/dd/yyyy* format, or click the Calendar  button to select the date from a calendar page.



Tip! The age will not calculate until you leave the page.

5. In the Biographical History area:
 - a) Leave the default *Effective Date*, which should match the effective date in the Name section.
 - b) For *Gender*, type **F** for Female or **M** for Male, or click the down  arrow to select the gender. If unknown, select **Unknown**. (As with ethnicity, they can choose to not disclose gender.)
 - c) Skip the *Highest Education Level*. This will be refreshed automatically each night from the Education page.

- d) Select *Marital Status* from the drop-down list (default is **Unknown**) or type the first letter or two of the marital status to select it. You can leave the *As of* date blank.
6. In the *National ID* area:
 - Type the United States Social Security number in the *National ID* field without dashes (for example, **222885555**).
 - If the person does not have a Social Security number, leave *National ID* blank (will default to **999999999**).
7. In the *Citizenship/Passport* area:
 - The default *US Citizenship Status* is **Citizen**. If not a US citizen, click the down arrow and select an appropriate citizen status:
 - **Alien Permanent** (resident alien), or
 - **Alien Temporary** (non-resident alien).
 - For a permanent or temporary alien, click the Lookup button to look up and select the *Country of Citizenship*. If not known, leave this field blank. (If you specify **Citizen**, the *Country of Citizenship* defaults to **USA** when you save the record, even if you leave it blank.)
8. Click the *Contact Information* tab to continue.
9. In the *Current Addresses* area, click the [Add Address Detail](#) link. On the *Addresses* page:
 - a) Make sure *Effective Date* is the date specified on the *Biographical Details* page.
 - b) The default *Country* is **USA**. If the address is in a different country, use the Lookup button to locate the correct country code. and skip to Step f.
 - c) Make sure the address *Status* is **A** for Active (default).



Important! *If the person is a terminated graduate or undergraduate student, and the home address status is **Inactive**, change the status to **Active** if the address is still valid, or add a new row and enter the new home address with the hire date as the effective date.*




- d) Click the [Add Address](#) link.
- e) For a US or Canadian address, the QuickAddress Address Selection page is displayed:

- In the *Address 1* field, type the first line of the street address. If there is an apartment or unit number, enter it in the *Address 2* field.
 - Type the zip code in the *Postal* field.
 - Click the Search button. The results depend on whether or not a match is found:
 - If the system finds a match, it returns the full address on the Edit Address page. If the address you entered is not the preferred postal service address, it will be changed to the preferred address.
 - If the system does not find a match, it always offers the options to use the original search address you entered, or change the address and search again.
 - If the system does not find a match, but finds an alternative it can recommend, the recommended address is displayed with the additional option to accept the recommended address.
 - If the system does not find a match because the street number is invalid, it prompts you to supply the correct building number. You can display a list of correct numbers, and based on the set of numbers displayed, enter the appropriate number in the Building Number field. (*Tip! Do not click the link for the street numbers.*)
 - The address is displayed on the Edit Address page, with all the fields dimmed. If necessary, you can override the displayed values (for example, if a person uses the Princeton zip code but has a Montgomery Township street address). Click the [Override & Update Manually](#) link to open the fields for input.
- f) For addresses outside the USA or Canada, complete the fields on the Edit Address page.
- g) Click OK to return to the Address History page.

10. If the address you entered in Step 9 is not a local address, and you have specified an effective date prior to the expected hire date, you should enter a second, Princeton University department address with an effective date that matches the hire date after you complete the add process.









Note: You cannot add the second home address during the add process. After you complete the add process, use the Modify a Person pages to add a new effective-dated row for the Home address (see “Adding a Second Home Address” on page 31), using either the person’s department address at Princeton or a local address, if known, that will be effective with the date of hire.

11. When you have entered the Home address, click OK to return to the Contact Information page.
12. If the person has an alternate mailing address, such as a P. O. box:
 - a) In the *Address Type* area, click the Add  button to insert a new row.
 - b) For *Address Type*, click the Lookup  button to look up and select the type, such as **Mailing Address**.
 - c) Enter the address data as described in Step 9.
13. If the person is a current or terminated graduate or undergraduate student, check to see if there is an existing mailing address (*Address Type MAIL*) used as a student. If found:
 - a) On the Address History page, click the Add  button to insert a new row.
 - b) Change the *Status* of the student mailing address to **Inactive**, effective with the hire date.
14. On the Contact Information page, in the Phone Information area, enter the person’s home phone:




Important! Do not enter a Princeton University campus phone number or e-mail address.

- a) For *Phone Type*, click the down  arrow and select **Home/Local**.
- b) Type the *Telephone* number in this format: 777-555-1212
- c) To specify an additional non-campus phone number, such as a mobile (cell) phone number:

- Click the Add  button to insert a new row.
 - Select the *Phone Type*, and type the *Telephone* number.
- d) After you enter all phone numbers, click the OK  button.
15. A campus e-mail address is automatically generated. If the person has an additional non-campus e-mail address, enter the address on the Contact Information page in the Email Addresses area:
- a) For *Email Type*, click the down  arrow and select the appropriate type, such as **Home**.
 - b) Type the *Email Address*.
 - c) To specify an additional e-mail address:
 - Click the Add  button to insert a new row.
 - Select the *Email Type*, and type the *Email Address*.
16. After you enter all e-mail addresses, click the Regional tab.
- a) In the Ethnic Group area, use the Lookup  button to locate the person's *Ethnic Group*, or type the entire group name (for example, **White**). If the ethnic group is unknown, indicate **Unknown**.




Tip! Valid ethnic/race values for HCM include only **Amind, Asian, Black, Hispa, Pacif, and White**. Do not use any other values in this Lookup list.

If the person is multi-racial, click the Add Row  button to add another race/ethnic group. Do not use the value **Multi** (multiracial), but specify one or more valid HCM values. **Unknown** should only be used as a single primary value.



Note: The *Primary* checkbox () is selected by the system, and cannot be changed. If multiple races/ethnicities are selected, the system will add a new row for the **Multi** option and select that row as *Primary*, unless one of the selected options is **Hispa**. If **Hispa** is selected, it is checked as *Primary* regardless of any other ethnicities, including **Multi**.

Tip! Hispanic is considered to be the only ethnic group. All other choices are races, as per the Departments of Labor and Education.

Tip! Use [View All](#) to see all ethnicities, or scroll through the rows using the Show Next Row  arrow in the navigation header.

- b) In the History section, when adding a new person whose military status is unknown,
 - Enter today's date (or in the case of a retroactive change, the date of hire) in the *Effective Date* field.
 - Click the down arrow to select the status of **Not Indicated**.
 - When you receive the form with the military status indicated, add a new row with the appropriate *Effective Date* and *Status* (see "Updating Military Status" on page 232).

If the person has indicated a *Military Status*,

- Make sure the *Effective Date* matches the other effective dates.
- Click the down arrow to select the status, such as **Active Reserve**.

17. Click the Organizational Relationships tab:

- a) Click the checkbox for *Person of Interest*.
- b) When the drop-down list field appears, select **DOF Affiliate**.
- c) Click the Add the Relationship button.
- d) On the Add Person of Interest page, select a *Security Access Type of Business Unit*, and type **PUDOF** in the *Value 1* field.
- e) Click the [Add the Specific Transaction](#) link.

18. The personal data is saved, and an EmplID is assigned. The Recommendation Status page group is displayed. Continue with Step 2, on page 29.



Important! When the record is saved, the ID value displayed at the top of the page changes from **NEW** to a numeric ID assigned by the system. Be sure to make a note of the numeric ID on the Appointment Recommendation form. This ID is the first thing you will enter when you add this pending hire in PeopleSoft.

Related Procedure:

After you have added the person to Campus Community, you must establish the person as a pending DOF hire:

- See "Adding a DOF Recommendation Pending Hire" on page 28.

Adding a DOF Recommendation Pending Hire

Follow the steps in this section to add a PeopleSoft record for a Dean of Faculty (DOF) appointment recommendation. The record will establish the person being recommended as a pending DOF hire, and provide important information to the Visa office and department managers during the time it takes to complete the approval process.



Important! Do **not** use the **Recommendation Status** menu option to enter leave or sabbatical requests, annual July 1st salary changes, or a termination, retirement, or death. PeopleSoft is not used to track recommendations and approvals for these actions.

Before you start this procedure, make sure you have...

- Searched the entire database to see whether a record/affiliation already exists for the person being recommended (“Searching for a Person” on page 6).
- If you did **not find** a record, make sure you have added the person to the database as a DOF Affiliate (see “Starting a DOF Hire Pending Approval of the Recommendation” on page 20).
- If you **found** a record, make sure you have:
 - Checked for any conflict of affiliation (see “Checking University Affiliation(s)” on page 10)
 - Determined whether the person is eligible to be hired (see “Checking the Employee Record Number” on page 15)
 - As needed, updated personal data (see “Updating Non-Campus Addresses and Contact Information” on page 222).




To update the recommendation page for a pending hire:

1. If you are not already on the Approval Status page of the Recommendation Status component,
 - a) Select **Workforce Administration > Job Information > Princeton Data > Recommendation Status**.
 - b) On the Search page:
 - If the EmplID did not carry over from the previous page (it will carry from the Add a Person of Interest page), type the *EmplID* (same as theDOF Affiliate ID), or type an appropriate search value in one or more of the other search criteria fields.
 - Click the Search button.
2. On the Approval Status page:
 - a) Type the *Date Received* (defaults to today's date) or click the Calendar button to select the date received.
 - b) For *Business Unit*, type **PUDOF**.
 - c) Type the number of the *Department* making the recommendation.
3. Click the **Appointment Info** tab, or click the Appointment Info link at the bottom of the page. On the Appointment Info page:
 - a) For *Action Rec*, click the down arrow and select **New Hire, Rehire, or Purchase**. For staff transferring from another Princeton University business unit to DOF, select **Stf Trnsfr**.
 - b) Type the *Appt Start Date* or click the Calendar button to select the start date of the appointment.
 - c) If applicable, type the *Appt End Date* or click the Calendar button to select the date the appointment will end.
 - d) Type the *Job Code*, or click the Lookup button to look up and select the job code. The *Job Function* code (staff code) is automatically displayed when you specify the job code.
 - e) *Academic Division, National ID, Gender, and Citizenship Status* from the Add a Person page group are display-only here.
 - f) For *FTE Salary*, type the recommended full-time equivalent (FTE) annual salary. For a part-time employee, type the salary that would be earned if the employee worked full time for a year.

- g) For *Duty Time*, type the recommended percentage of a full-time work week that the employee will work, for example, **50** if the employee will work half time. Do not specify a percent sign (%).
- h) For *Number of Pays*, type the recommended number of actual months (pay periods) per year for this employee. .



Important! *The number of actual pay periods cannot exceed the number of base periods per year: 10 for faculty and 12 for professional researchers, specialists, and librarians.*

- i) *Actual Salary* is the actual salary paid to an employee, and is automatically calculated using the values you enter in the *FTE Salary*, *Actual Pay Periods*, and *Duty Time* fields.
 - j) Optionally, you can enter *Notes* regarding the recommendation.
4. Click the Save  button.

Related Procedure:

- To enter the final status of the recommendation after the approval process has been completed, see “Updating the Appointment Recommendation Page” on page 34.

Adding a Second Home Address

If you need to add a second home address (for example, the department campus address) for a future-dated hire, because their primary address is not local, use the Modify a Person component to add the future-dated home address.

To add a second, future-dated, home address:

1. Navigate to **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find an Existing Value page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.




Tip! To search by first and last name, enter the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button.
3. Click the Contact Information tab.
 4. Locate the Home/Local Address row, and click the [View Address Detail](#) link.
 5. In the Address History area, click the Add Row button.
 6. For *Effective Date*, type the expected hire date, or click the Calendar button to select the date of hire.
 7. Since this is the local address, make sure the *Country* is **USA**.
 8. Click the [Add Address](#) link and then click the Edit & Verify Address button. Enter the local street address and zip code that will be effective with the date of hire. If no local address has been given, specify a campus department address effective with the date of hire.



Important! As soon as you receive a valid local home address (usually on a Personal Data form), correct the local address effective on the date of hire.


9. Click the Search  button. If the system finds a match, it displays the complete address on the Edit Address page. Click OK to return to the Address History page.

If the system doesn't find a match, you are given options appropriate to what it finds. They may include any of the following:

- [Use original search address](#) - to use the address you typed.
 - [Edit original search address and search again](#) - to change what you typed and search again.
 - [Display all potential matches](#) or [Display all street numbers](#) - to display information that may be used to complete the address.
 - [Accept recommended address](#) - to accept the address displayed by the system.
10. When the address is displayed on the Edit Address page, you can override any of the values by clicking the [Override & Update Manually](#) link. This opens the fields so you can type the preferred value over the supplied value.
 11. When the address is correct, click OK to save the new local address and click OK again to return to the Contact Information page.



Note: You will not see the new local address if it has a future effective date. To see both the current and the new address, click the [View Address Detail](#) link.

12. Click the Save  button to save your changes.

Completing a DOF Hire After Approval of the Recommendation

This section describes how to complete the hire process for a Dean of Faculty (DOF) appointment, after the DOF office receives a signed and approved (or disapproved) Appointment Recommendation form.

For all appointment recommendations regardless of the outcome, follow the steps in “Updating the Appointment Recommendation Page” on page 34.

If the appointment has been approved, follow the appropriate procedure to complete the hire record:

- For a new employee, see “Adding an Employment Instance for a DOF New Hire” on page 36.
- For a former employee, see “Rehiring into a DOF Appointment” on page 45.
- For a DOF retiree, see “Hiring a DOF Retiree into a Part-Time Appointment” on page 55.

DOF Secondary Appointment (Faculty Purchase)

If you are hiring a non-faculty employee into a DOF secondary appointment, follow the procedures in “DOF Secondary Appointments (Faculty Purchase)” on page 101.

Updating the Appointment Recommendation Page

Follow these steps to update the Recommendation Status page when the Office of the Dean of Faculty (DOF) receives formal approval of a department recommendation.






To update the recommendation status after approval:

1. Select **Workforce Administration > Job Information > Princeton Data > Recommendation Status**.
2. On the Search page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.





Tip! To search by first and last name, enter the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search  button.
3. On the Approval Status page, complete these fields (following what is written at the bottom of the Appointment Recommendation form):
 - a) For *Decision*, click the down  arrow and select the decision of the approver or approval committee (for example, **Approved**).
 - b) Type the *Decision Date* in *mm/dd/yyyy* format, or click the Calendar  button to select the date of the decision.
 - c) For *Decision By*, type the initials of the approver or the approving committee.



Important! If you are not authorized to process job updates, see your system administrator before updating the *Final Action* and *Action Date* fields.

4. If the person is a new appointment with the rank of professor, associate professor, or assistant professor, make sure an acceptance letter has been received before you continue.
 - If the DOF office has **not received** an acceptance letter, save your entries to this point and complete the *Final Action* and *Final Date* fields when the letter is received. Otherwise, continue with the next step to finalize the recommendation status.

5. In the *Final Action* field:
 - If the person has accepted the appointment and, if required, an acceptance letter has been received, select **Processed**.
 - If the person has declined the appointment, select **Closed**. Selecting **Closed** automatically updates the Affiliations page to **DOF Affiliate Inactive**, and releases the record from DOF ownership.
6. Type the *Action Date* in *mm/dd/yyyy* format, or click the Calendar  button to select the date of the action.
7. Click the Save  button.



Important! When you enter a *Final Action* of **Processed**, be sure to immediately complete the appropriate related procedure, below.

Related Procedures:


If the appointment has been approved, follow the appropriate procedure to complete the hire record:

- For a new employee, see “Adding an Employment Instance for a DOF New Hire” on page 36.
- For a former employee, see “Rehiring into a DOF Appointment” on page 45.
- For a DOF retiree, see “Hiring a DOF Retiree into a Part-Time Appointment” on page 55.

Adding an Employment Instance for a DOF New Hire

Follow the steps in this section to enter primary job information for a person who is a new hire into a Dean of Faculty (DOF) appointment. Use this procedure after the DOF approval process has been completed, and the appointment recommendation has been approved.



Note: Under certain unusual and very rare circumstances, it might be necessary to bypass the appointment recommendation process. In this case, you have the option of using **Workforce Administration > Personal Information > Add a Person** to add a new employee record, but instead of clicking the *Person of Interest* checkbox, click the *Employee* checkbox, and click the Add the Relationship  button. This opens the Job page group so you can hire the person.

Tip! The error message you get when you try to add an employment instance for a person who is already in the system is a bit cryptic: **This Empl_Rcd is already in use for this Person...Choose a different EMPL-RCD.** What you do next depends on the circumstances:

- If this is a rehire or transfer, you can go directly to the Job page and insert a new row.
- If the person has another current affiliation, you should check the Affiliation page to see what the person's affiliation is (HR or PPL perhaps), and then coordinate with that office as needed to process the DOF appointment.

Before you start this procedure, make sure you have...

- Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Updating the Appointment Recommendation Page” on page 34)
- As needed, updated personal data (see “Updating Non-Campus Addresses and Contact Information” on page 222)
- For a former undergraduate or graduate student employee, determined that the status of the student record (**50**, **51**, or **60**) in Campus Community is **Terminated**, and that the termination date either matches or precedes the hire date (see “Checking University Affiliation(s)” on page 10)


- *Determined that the person is not a former employee of Princeton University (see “Checking the Employee Record Number” on page 15).*



To add an employment instance for a DOF new hire:

1. Select **Workforce Administration > Job Information > Add Employment Instance**.
2. On the Add page:
 - a) For *EmplID*, type the person’s PeopleSoft ID.



Note: Do not use the Lookup  button on the *EmplID* field, since the search will take a very long time!

Tip! *If you just updated the Recommendation Status page, when you open this page, the person’s EmplID will be carried over.*

- b) Leave the *Empl Rcd Nbr* as **0**.





Note: The *Empl Rcd Nbr* will default to the next highest number, so if the person is a former graduate student, the displayed number will be **61**. Be sure to change the number to **0** before proceeding.


- c) Click the Add  button.

3. On the Work Location page:



Important! *Do not click the Save  button or press the Enter key until you have entered **all** data on all pages.*

- a) Type the *Effective Date* of the hire, or click the Calendar  button to select the date.
- b) Make sure *Job Indicator* is **Primary Job**.
- c) Make sure the *Action* is **Hire** (default).
- d) In the *Reason* field, select **Regular Staff** from the drop-down list.
- e) Specify *Expected Job End Date* and *Tenure Flag* as follows:

- For a faculty member or other employee on a term appointment, type the *Expected Job End Date* in *mm/dd/yyyy* format, or click the Calendar  button to select the date.





Important! The *Expected Job End Date* is always the day after the last expected day of work. For example, if the employee's last day is expected to be 6/30/2009, the expected job end date would be 7/1/2009.

- For an open-ended, non-tenured appointment, you can leave *Expected Job End Date* blank. Do **not** check *Tenure Flag*.
- For a tenured faculty member, leave *Expected Job End Date* blank, and select () *Tenure Flag*.

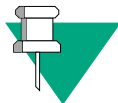


Note: A faculty member must either have an *Expected Job End Date*, or the *Tenure Flag* selected. A faculty member cannot be both tenured and have an expected job end date.

If a non-tenured faculty member is hired for the entire academic year, but will have a duty time change between the fall and spring terms, specify **07/01** (July 1) of the year the appointment ends. However, specify **5** for *Actual Pay Periods* (see Step 7). After you complete the hire process, you will add a new job row to change the duty time mid-year for the employee (see Step 11).

- f) Leave *Position Number* blank.
- g) Make sure *Business Unit* is **PUDOF** (Princeton Dean of Faculty). If not, type or select **PUDOF**.
- h) Type the number of the *Department* where the employee will be working and press the Tab key, or click the Lookup  button to look up and select the department, for example, **107 Anthropology**.
- i) Make sure the default *Mail Drop* is where the employee should receive pay checks and campus mail. If not, type the correct mail drop or click Lookup  to look up and select the mail drop.

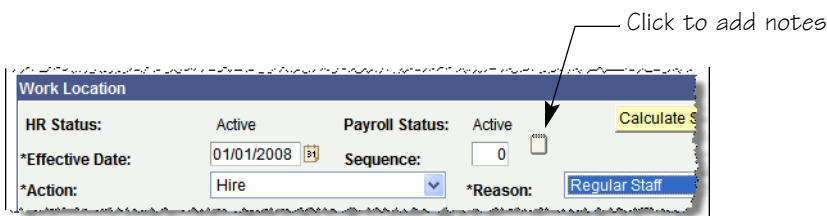
4. If a comment or note is needed, enter it on the Job Data Notepad:

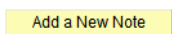



Note: The Job Data Notepad allows you to enter information not included in any other field, such as


- Notes regarding a Howard Hughes Medical Institute (HHMI) affiliation
- Notes regarding a Princeton-Rutgers exchange
- Notes specifying that Payroll is to pay a home institution rather than the individual.
- Notes specifying the location where a person works, if not on the Princeton campus (i.e., a different state or country).

a) On the Work Location page, click the Maintain/View Notes  icon.



- b) On the Job Data Notepad, verify that the *Eff Date* is the date of the hire or relevant job action, and correct it if it is not.
- c) Click the Add a New Note  button.
- d) In the *Subject*, type a brief, succinct indication of what the comment is, for example, **Institutional Payment**.
- e) In the *Note Text* field, type the full note text, up to 100 characters, such as **Pay salary directly to Smithsonian Institution**.
- f) Click the Save  button to save the note, and then click the [Job Data Page](#) link to return to the Job Data page group.

5. Click the **Job Information** tab. On the Job Information page:

- a) For *Job Code*, type the code that describes the employee's rank and press the Tab key, or click the Lookup  button to look up and select the job code, for example, **0020 Professor**.
- b) The *Entry Date* defaults to the date of hire.


- c) For *Regular/Temporary*, click the down  arrow and select:



Note: To determine whether a DOF employee is eligible for benefits, see the appendix, “Tips & Techniques for DOF Users” on page 279.

- **R=BenElig** (default) if employee is eligible for benefits.
- **T=NoBen** if employee is not eligible for benefits.

- d) For *Full/Part*:



- If the employee will have 100% *Duty Time*, leave the default **Full-Time**.
- If the employee’s *Duty Time* will be anything less than 100%, click the down  arrow and select **Part-Time**.

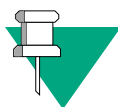
6. If this is a non-paid appointment, or if the person is on the Princeton-Rutgers Exchange or other Institutional Payment Program, you must specify that the appointment is non-paid. (For HHMI, Princeton-Rutgers Exchanges, and Institutional Payments, you must also add a Job Note as described in Step 4, on page 39.)

- a) Click the **Payroll** tab.



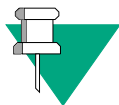
Note: The Payroll page displays default values based on the *Job Code* you specified. You can override the values, if required.

- b) On the Payroll page, the *Pay Group* field will display one of the following DOF values:
- **MCF** for a faculty appointment (10-month salary)
 - **MCM** for professional, researcher, specialist, or librarian appointments (12-month salary)
 - **MCP** for visiting fellows and Postdoctoral research fellows (12-month stipend)
- c) For a non-paid appointment, type **NCX** in the *Pay Group* field, or click the Lookup  button to look up and select the [NCX Non-Paid Paygroup](#) link. When you see the message **Paygroup NCX is not the default for Jobcode nnnn**, click the OK  button.



Note: Certain non-paid appointments will list an FTE salary for budget or institutional payment purposes. Most, however, will have a \$0 FTE salary.

7. Click the **FTE Compensation** tab. On the FTE Compensation page:
 - a) For *FTE Salary*, type the full-time equivalent (FTE) annual salary. For a part-time employee, type the salary that would be earned if the employee worked full time for a year.



Note: *FTE Salary* is the annual salary paid to a full-time employee, or the salary that would be paid if a part-time employee worked full-time for a year. *Base Salary* is the actual salary paid to a part-time employee, and is automatically calculated using the values you enter in the *FTE Salary*, *Actual Pay Periods*, and *Duty Time* fields. In the case of postdoctoral research fellows, it is their entire compensation, including payments they may receive directly from the sponsor paying their stipend.

- b) For *Actual Pay Periods*:
 - For a non-tenured faculty member who is hired for two terms, but with a duty time change between the fall and spring terms, type **5**.
 - Otherwise, type the number of actual months (pay periods) per year for this employee.



Important! *The number of actual pay periods cannot exceed the number of base periods per year: 10 for faculty, 2 for summer-only faculty, and 12 for researchers, specialists, and librarians.*

- c) For *Duty Time*, type the percentage of the full-time work week that the employee will work, for example, **50** if the employee will work half the week (you can specify up to three decimal places, if needed). Do not specify a percent sign (%).
 - d) If the employee is exempt (monthly) and will work a regular schedule of less than 12 months (for example, the employee will always be out during June and July of every year):



Note: This procedure only works when stopping pay for the summer months (June, July, and August). Payroll does not run the job to compare these dates in non-summer months.

- For *Stop pay beginning on 1st day of pay period*, type the number of the month pay will stop (for example, **6** for June).

- For *Restart pay on 1st day of pay period*, type the number of the month pay will restart (for example, **8** for August).

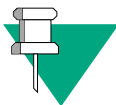


Note: For a faculty appointment, *Stop pay* automatically defaults to **7**, and *Restart pay* defaults to **9**. You cannot change these values.



8. If you are hiring a Visiting Fellow or Postdoctoral Research Fellow who will be paid by *stipend* (the default) the pay group and earnings code default to the correct values.

If the visiting fellow will be paid a *wage supplement* in addition to or instead of a stipend, you must specify how earnings are distributed:

- a) Click the [Earnings Distribution](#) link at the bottom of the page.
- b) For *Earnings Distribution Type*, click the down ▾ arrow and select **By Amount**.
- c) If all earnings are to be paid as a wage supplement:
 - Under *Job Earnings Distribution*, type **171** in the *Earn Code* field.
 - Type the total compensation payment (monthly amount) in the *Compensation Rate* field.
- d) For Postdoctoral Research Fellows, when earnings are to be split between a stipend (paid or unpaid), a reirement wage supplement, and/or a miscellaneous wage supplement for work performed for Princeton:
 - If Princeton is paying a stipend, type **170** in the *Earn Code* field Under *Job Earnings Distribution*, and the monthly stipend amount in the *Compensation Rate* field.
 - If the fellow is receiving a stipend not paid by Princeton, type **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.



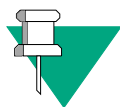
Note: On rare occasions, the stipend may be split between both 170 and 058 earnings, in which case you need to add a second row to split the earnings types. Click the Add **+** button to insert a new row before typing **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.


- All Postdoctoral Research Fellows receive a salary supplement in lieu of retirement contributions. To add this payment, click the Add  button to insert a new row. In the new row, type **172** in the *Earn Code* field, and the monthly amount of the wage supplement specifically designated for retirement (normally 10% of the stipend amount as designated in the 170/058 earnings) in the *Compensation Rate* field.
- If a Postdoctoral Research Fellow receives an additional wage supplement beyond the stipend or retirement supplement, click the Add  button to insert a new row. In the new row, type **171** in the *Earn Code* field, and the monthly amount of the wage supplement in the *Compensation Rate* field.





Important! *The amounts allocated to stipend and wage supplement must equal the monthly Compensation Rate displayed at the top of the page, or the page cannot be saved.*

- Click the [Job Data](#) link to return to the Job Data page group.
9. If the person you are hiring has an affiliation with the Howard Hughes Medical Institute (HHMI):
- a) Click the [Benefits Program Participation](#) link.
 - b) Type **HHMI** in the *Elig Fld 4* field.



Note: Be sure to add a note using the Maintain/View Notes  icon on the Work Location page, as described in Step 4, on page 39.

- c) Click the [Job Data](#) link to return to the Job Data page group.
10. Click the Save  button.
11. For a non-tenured faculty member who is hired for the entire academic year, but with a duty time change between the fall and spring semesters, indicate the *Expected Job End Date* as the end of the full appointment period (for example, **July 1, 2009**), but the months appointed as **5** on the FTE Compensation page:
- a) After you save the hire, navigate to **Workforce Administration > Job Information > Job Data**. The *EmplID* will be carried over.
 - b) Click the Search button, and then click the Add  button to add a new row for the second semester.
 - c) For *Action*, select **Pay Rate Change**.

- d) For *Reason*, type **C** or select **Change Duty Time/Number Pays**.
- e) For *Effective Date*, specify **02/01** (February 1) of the year the second term begins.
- f) Click the Job Information tab. On the Job Information page, make sure the *Regular/Temporary* and *Full/Part* fields specify the appropriate benefits and full-time/part-time status for the semester.
- g) Click the FTE Compensation tab. On the FTE Compensation page:
 - Make sure *Actual Pay Periods* is **5**.
 - Specify the different *Duty Time* for the second semester.



Note: The *Expected Job End Date* (Job Information page) and *FTE Salary* (FTE Compensation page) will be the same for both semesters.

- h) Click the Save  button.

12. Complete all appropriate related procedures, below.

Related Procedures:

- For a Postdoctoral Research Fellow or Visiting Fellow with an institutional allowance, enter the institutional allowance as described in “Updating DOF Allowances” on page 76.
- For a non-faculty professional who has been granted a moving allowance, enter the moving allowance as described in “Updating DOF Allowances” on page 76.
- To update the educational level of a faculty or academic professional, see “Updating Education” on page 87.
- To update the title of a faculty or academic professional, see “Updating Administrative Posts” on page 69.

Next Day Follow-Up:

- Audit (using printed audit reports run nightly)
- Appointment letter



Note: Department managers will receive an e-mail message notifying them that the data has been entered into the system.

Rehiring into a DOF Appointment

Follow the steps in this section to enter rehire information for a person who is a former Princeton University employee. Use this procedure after the Dean of Faculty (DOF) approval process has been completed, and the appointment recommendation has been approved.



Important! To process the rehire of a former employee who worked in a regular Human Resources (HR) or Plasma Physics Laboratory (PPL) position, see your system manager for assistance. For a former main campus (non-PPL) casual hourly or short-term professional employee, you can probably continue without assistance.


Before you start this procedure, make sure you have...

- Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Updating the Appointment Recommendation Page” on page 34)
- As needed, updated personal data (see “Updating Non-Campus Addresses and Contact Information” on page 222)
- For a former undergraduate or graduate student employee, determine that the status of the student record (**50**, **51**, or **60**) in Campus Community is **Terminated**, and that the termination date either matches or precedes the hire date (see “Checking University Affiliation(s)” on page 10).




To rehire into a DOF appointment:


1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Search page, type the *Empl ID* and click the Search button. If two records are displayed for the employee, click the link for the *Empl Rcd Nbr 0* record.

3. On the Work Location page:
 - a) Make sure *Employee Status* is **Terminated**. If the status is not **Terminated**:
 - For a regular DOF employee, terminate the current DOF employment. (If a DOF term appointment, make sure the *Expected Job End Date* precedes the hire date. If not, check to see if this action should be a transfer, not a rehire.)
 - For a casual hourly or short-term professional employee, see your system administrator and coordinate with the Human Resources and Time Collection offices to terminate employment.
 - b) Click the Add  button to insert a new row. Notice that:
 - The row count in the scroll bar is incremented by 1 (for example, **1 of 3** will change to **1 of 4**).
 - The *Effective Date* defaults to either today's date or the date on the most future-dated row.



Important! Do not click the Save  button or press the Enter key until you have entered **all** data on all pages.

- c) Type the *Effective Date* of the rehire, or click the Calendar  button to select the date.
- d) If the *Effective Date* of this rehire is the same as the prior row (for example, prior row is a termination) make sure the *Sequence* is **1**. Otherwise, *Sequence* is **0** (default).
- e) Make sure *Job Indicator* is **Primary Job**.
- f) Make sure *Action* is **Rehire**.
- g) In the *Reason* field, select the reason:
 - **Rehire Regular Staff** if the person has ever held a regular employee position
 - **Reactivate Staff as New Hire** if the person previously was *only* a casual hourly employee or short-term professional, and is being reactivated as a new regular employee.
- h) Specify *Expected Job End Date* and *Tenure Flag* as follows:

- For a faculty member or other employee on a term appointment, type the *Expected Job End Date* in *mm/dd/yyyy* format, or click the Calendar  button to select the date.






Important! *The Expected Job End Date is always the day after the last expected day of work. For example, if the employee's last day is expected to be 6/30/2009, the expected job end date would be 7/1/2009.*

- For an open-ended, non-tenured appointment, you can leave *Expected Job End Date* blank. Do **not** check *Tenure Flag*.
- For a tenured faculty member, leave *Expected Job End Date* blank, and select () *Tenure Flag*.



Note: A faculty member must either have an *Expected Job End Date*, or the *Tenure Flag* selected. A faculty member cannot be both tenured and have an expected job end date.

If a non-tenured faculty member is hired for the entire academic year, but will have a duty time change between the fall and spring terms, specify **07/01** (July 1) of the year the appointment ends. However, specify **5** for *Actual Pay Periods* (see Step 7). After you complete the hire process, you will add a new job row to change the duty time mid-year for the employee (see Step 11).


- Leave *Position Number* blank. If the person was formerly an HR or PPL employee, blank out the *Position Number*.
- Make sure *Business Unit* is **PUDOF**. If not, type **PUDOF** or click Lookup  to look up and select the unit.
- Type the number of the *Department* where the employee will be working and press the Tab key, or click the Lookup  button to look up and select the department, for example, **107 Anthropology**.
- Make sure the default *Mail Drop* is where the employee should receive pay checks and campus mail. If not, type the correct mail drop or click Lookup  to look up and select the mail drop.

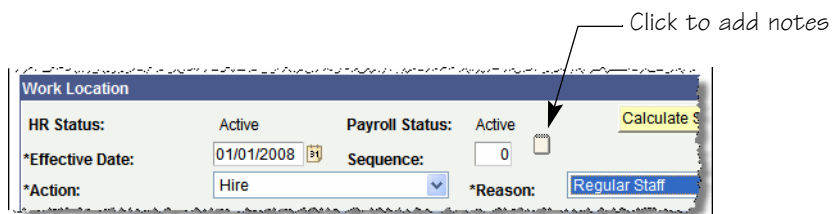
4. If a comment or note is needed, enter it on the Job Data Notepad:



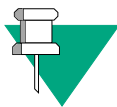
Note: The Job Data Notepad allows you to enter information not included in any other field, such as

- Notes regarding a Howard Hughes Medical Institute (HHMI) affiliation
- Notes regarding a Princeton-Rutgers exchange
- Notes specifying that Payroll is to pay a home institution rather than the individual.
- Notes specifying the location where a person works, if not on the Princeton campus (i.e., a different state or country).



- a) On the Work Location page, click the Maintain/View Notes  icon.





- b) On the Job Data Notepad, verify that the *Eff Date* is the date of the hire or relevant job action, and correct it if it is not.

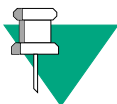


Note: Once a Job Note is added, the *Effective Date* of the Job Note cannot be changed. Please be careful to make sure the *Effective Date* of the Job Note matches the *Effective Date* of the Job row you are working on. If a Job Note is added without matching a Job row *Effective Date*, the note will be orphaned and lost from view.


- c) Click the Add a New Note  button.
- d) In the *Subject*, type a brief, succinct indication of what the comment is, for example, **Institutional Payment**.
- e) In the *Note Text* field, type the full note text, up to 100 characters, such as **Pay salary directly to Smithsonian Institution**.
- f) Click the Save  button to save the note, and then click the [Job Data Page](#) link to return to the Job Data page group.

5. Click the **Job Information** tab. On the Job Information page:

- a) For *Job Code*, type the code that describes the employee's rank and press the Tab key, or click the Lookup  button to look up and select the job code, for example, **0020 Professor**.
- b) For *Regular/Temporary*, click the down  arrow and select:

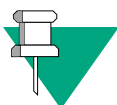


Note: To determine whether a DOF employee is eligible for benefits, see the appendix, "Tips & Techniques for DOF Users" on page 279.

- **R=BenElig** (default) if employee is eligible for benefits.
 - **T=NoBen** if employee is not eligible for benefits.
- c) For *Full/Part*:
 - If the employee will have 100% *Duty Time*, leave the default **Full-Time**.
 - If the employee's *Duty Time* will be anything less than 100%, click the down  arrow and select **Part-Time**.



- 6. If this is a non-paid appointment, or if the person is on the Princeton-Rutgers Exchange or other Institutional Payment Program, you must specify that the appointment is non-paid (for HHMI, Princeton-Rutgers Exchanges, and Institutional Payments, you must also add a Job Note as described in Step 4, on page 48).

- a) Click the **Payroll** tab.



Note: The Payroll page displays default values based on the *Job Code* you specified. You can override the values, if required.

- b) On the Payroll page, the *Pay Group* field will display one of the following DOF values:
 - **MCF** for a faculty appointment (10-month salary)
 - **MCM** for an administrative, research, technical, or library appointment (12-month salary)
 - **MCP** for visiting fellows and visiting research fellows (12-month stipend)

- c) For a non-paid appointment, type **NCX** in the *Pay Group* field, or click the Lookup  button to look up and select the [NCX Non-Paid Paygroup](#) link. When you see the message **Paygroup NCX is not the default for Jobcode nnnn**, click the OK  button.



Note: Certain non-paid appointments will list an FTE salary for budget purposes. Most, however, will have a \$0 FTE salary.

- 7. Click the **FTE Compensation** tab. On the FTE Compensation page:
 - a) For *FTE Salary*, type the full-time equivalent (FTE) annual salary. For a part-time employee, type the salary that would be earned if the employee worked full time for a year.



Note: *FTE Salary* is the annual salary paid to a full-time employee, or the salary that would be paid if a part-time employee worked full-time for a year. *Base Salary* is the actual salary paid to a part-time employee, and is automatically calculated using the values you enter in the *FTE Salary*, *Actual Pay Periods*, and *Duty Time* fields.

- b) For *Actual Pay Periods*:
 - For a non-tenured faculty member who is hired for two terms, but with a duty time change between the fall and spring terms, type **5**.
 - Otherwise, type the number of actual months (pay periods) per year for this employee.



Important! *The number of actual pay periods cannot exceed the number of base periods per year: 10 for faculty, 2 for summer-only faculty, and 12 for researchers, specialists, and librarians.*

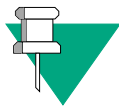
- c) For *Duty Time*, type the percentage of the full-time work week that the employee will work, for example, **50** if the employee will work half the week (you can specify up to three decimal places, if needed). Do not specify a percent sign (%).

- d) If the employee is exempt (monthly) and will work a regular schedule of less than 12 months (for example, the employee will always be out during June and July of every year):



Note: This procedure only works when stopping pay for the summer months (June, July, and August). Payroll does not run the job to compare these dates in non-summer months.

- For *Stop pay beginning on 1st day of pay period*, type the number of the month pay will stop (for example, **6** for June).
- For *Restart pay on 1st day of pay period*, type the number of the month pay will restart (for example, **8** for August).



Note: For a faculty appointment, *Stop pay* automatically defaults to **7**, and *Restart pay* defaults to **9**. You cannot change these values.


8. If you are rehiring someone as a Postdoctoral Research Fellow or Visiting Fellow who will be paid by *stipend* (the default) the pay group and earnings code default to the correct values.



If the visiting fellow will be paid a *wage supplement* in addition to or instead of a stipend, you must specify how earnings are distributed:

- a) Click the [Earnings Distribution](#) link at the bottom of the page.
- b) For *Earnings Distribution Type*, click the down arrow and select **By Amount**.
- c) If all earnings are to be paid as a wage supplement:
 - Under *Job Earnings Distribution*, type **171** in the *Earn Code* field.
 - Type the total compensation payment (monthly amount) in the *Compensation Rate* field.
- d) For Postdoctoral Research Fellows, when earnings are to be split between a stipend (paid or unpaid), a retirement wage supplement, and/or a miscellaneous wage supplement for work performed for Princeton:
 - If Princeton is paying a stipend, type **170** in the *Earn Code* field Under *Job Earnings Distribution*, and the monthly stipend amount in the *Compensation Rate* field.

- If the fellow is receiving a stipend not paid by Princeton, type **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.



Note: On rare occasions, the stipend may be split between both 170 and 058 earnings, in which case you need to add a second row to split the earnings types. Click the Add  button to insert a new row before typing **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.

- All Postdoctoral Research Fellows receive a salary supplement in lieu of retirement contributions. To add this payment, click the Add  button to insert a new row. In the new row, type **172** in the *Earn Code* field, and the monthly amount of the wage supplement specifically designated for retirement (normally 10% of the stipend amount as designated in the 170/058 earnings) in the *Compensation Rate* field.
- If a Postdoctoral Research Fellow receives an additional wage supplement beyond the stipend or retirement supplement, click the Add  button to insert a new row. In the new row, type **171** in the *Earn Code* field, and the monthly amount of the wage supplement in the *Compensation Rate* field.




Important! *The amounts allocated to stipend and wage supplement must equal the monthly Compensation Rate displayed at the top of the page, or the page cannot be saved.*

- Click the [Job Data](#) link to return to the Job Data page group.
9. If the person you are rehiring is switching into or out of an affiliation with the Howard Hughes Medical Institute (HHMI), click the [Benefits Program Participation](#) link.
- If the person is joining HHMI, enter **HHMI** in the *Elig Fld 4* field.
 - If they are leaving HHMI and returning to employee status, blank out **HHMI** in the *Elig Fld 4* field.




Note: Be sure to add a Job Note, as described in Step 4, on page 48.

- Click the [Job Data](#) link to return to the Job Data page group.


10. Click the Save  button.
11. For a non-tenured faculty member who is rehired for the entire academic year, but with a duty time change between the fall and spring semesters:

Note: Be sure to set the *Expected Job End Date* for the entire period of the appointment (for example, **7/1/09**), but the months worked to **5**.

- a) Click the **Work Location** tab. On the Work Location page, click the Add  button to add a new row for the second semester.
- b) For *Effective Date*, specify **02/01** (February 1) of the year the second term begins.
- c) For *Action*, specify **Pay Rate Change**.
- d) For *Reason*, specify **Change Duty Time/Number of Pays**.
- e) Click the **Job Information** tab. On the Job Information page, make sure the *Regular/Temporary* and *Full/Part* fields specify the appropriate benefits and full-time/part-time status for the semester.
- f) Click the **FTE Compensation** tab. On the FTE Compensation page:
 - Make sure *Actual Pay Periods* is **5**.
 - Specify the different *Duty Time* for the second semester.



Note: The *Expected Job End Date* (Job Information page) and *FTE Salary* (FTE Compensation page) will be the same for both semesters.

12. Click the Save  button.
13. Complete all appropriate related procedures, below.

Related Procedures:

- For a Postdoctoral Research Fellow or Visiting Fellow with an institutional allowance, enter the institutional allowance as described in “Updating DOF Allowances” on page 76.
- For a non-faculty professional who has been granted a moving allowance, enter the moving allowance as described in “Updating DOF Allowances” on page 76.

- To update the educational level of a faculty or staff member, see “Updating Education” on page 87.
- To update the title of a faculty or staff member, see “Updating Administrative Posts” on page 69.

Next Day Follow-Up:

- Audit (using printed audit reports run nightly)
- Appointment letter



Note: Department managers will receive an e-mail message notifying them that the data has been entered into the system.

Hiring a DOF Retiree into a Part-Time Appointment

Follow the steps in this section to complete the hire of a retired Princeton University employee into a non-benefits-eligible, Dean of Faculty (DOF) faculty or research appointment.

Always use Record **1** when you hire a retiree into a non-benefits eligible job. If the retiree never held a secondary job at Princeton University, use the **Add Employment Instance** menu option to create a new Record **1**. If the retiree previously held a secondary job at the University, use the **Job Data** menu option to update the existing Record **1**.






Important! Do not rehire a retired employee on Record **0** unless the person is returning as a benefits-eligible employee and giving up retirement benefits. In this case, see “Rehiring into a DOF Appointment” on page 45.

Before you start the procedure, make sure you have...


- Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Updating the Appointment Recommendation Page” on page 34)
- As needed, updated personal data (see “Updating Non-Campus Addresses and Contact Information” on page 222, or “Changing Biographic Data” on page 212)




To hire a retiree into a part-time appointment:

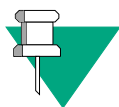
1. Choose one:
 - To add a new Record **1** (retiree has only a **0** record in PeopleSoft):
 - a) Select **Workforce Administration > Job Information > Add Employment Instance**.
 - b) On the Add page:
 - For *EmplID*, type the person’s PeopleSoft employee ID.
 - For *Empl Rcd Nbr*, type **1**.
 - Click the Add  button.
 - To display and update an existing Record **1** (retiree has both **0** and **1** records):
 - a) Select **Workforce Administration > Job Information > Job Data**.
 - b) On the Search page:
 - For *EmplID*, type the person’s PeopleSoft employee ID.
 - For *Empl Rcd Nbr*, type **1**.
 - Click the Search  button.
 - On the Work Location page, click the Add Row  button.
2. Specify hire and location information on the Work Location page:



Important! Do not click the Save  button or press the Enter key until you have entered **all** data on all pages.

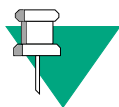
- a) In the *Effective Date* field, type the date of the hire, or click the Calendar  button to select the date.
- b) Make sure *Job Indicator* is **Primary**.

- c) In the *Action* field, type or select the *Action* code:
 - **Hire** for a new record **1** (you started with **Add Employment Instance**):
 - For an updated record **1** (you started with **Job Data**):
 - **Rehire** if there has been a break in service




Note: If there has been *no* break in service, process the hire as a transfer, using an *Action* of **Transfer**. See “Entering Promotions, Transfers, or Reclassifications” on page 133 for instructions on processing transfers.

- d) In the *Reason* field, select the code:
 - **Regular Staff** for a new record **1** (you started with **Add Employment Instance**):
 - For an updated record **1** (you started with **Job Data**):
 - **Rehire Regular Staff** if there has been a break in service (*Action* of **Rehire**)










Note: If there has been *no* break in service, process the hire as a transfer, using a *Reason* of **Reappointment, Staff Transfer, or Department Transfer**. See “Entering Promotions, Transfers, or Reclassifications” on page 133 for instructions on transfers.

- e) Specify the *Expected Job End Date*. Either type the estimated end date of the appointment in *mm/dd/yyyy* format, or click the Calendar  button to select the date from a calendar page.



Important! *The Expected Job End Date is always the day after the last expected day of work. For example, if the employee’s last day is expected to be 6/30/2009, the expected job end date would be 7/1/2009.*

- f) For *Business Unit*, type **PUDOF**, or click the Lookup  button to look up and select **PUDOF**.
- g) For *Department*, type the number of the department where the person will be working, or click Lookup  to look up and select the department.
- h) Verify that *Princeton Mail Drop ID* is correct. If not, click the Lookup  button to look up and select the mail drop where the employee will receive pay checks and campus mail.

3. Click the **Job Information** tab. On the Job Information page:
 - a) In the *Job Code* field, type the appropriate DOF post-retirement job code, or click Lookup  to look up and select the job code link (most often **0080, Lect w/rank Professor**).
 - b) For *Regular/Temporary*, type or select **T=NoBen**.
 - c) For *Full/Part*, type or select **Full-Time** (only if \$0 pay and therefore not benefits-eligible) or **Part-Time** (normally this will be **Part-Time**, and less than 50%).
4. If this is a non-paid post-retirement appointment, you must specify that the appointment is non-paid.
 - a) Click the **Payroll** tab to display the Payroll page.
 - b) In the *Pay Group* field, highlight the default value and type **NCX**, or click the Lookup  button to look up and select the **NCX** code.
 - c) When you see the message **Paygroup NCX is not the default for Jobcode nnnn**, click the OK  button.
5. Click the **FTE Compensation** tab. On the FTE Compensation page:
 - a) For *FTE Salary*, type:
 - **0.00** for an unpaid appointment
 - The appropriate full-time equivalent salary, for a paid appointment
 - b) For *Actual Pay Periods*, type:
 - From **1** to **12** for a DOF researcher, specialist, or librarian
 - Either **5** or **10** for a faculty member
 - c) For *Duty Time*, type the percentage of the full-time work week that the employee will work. Do not specify a percent sign (%).
 - For most retirees, the percentage must be less than **49**.
 - If months (pay periods) are less than **5**, or pay is **0.00**, you can specify any percentage.
6. Click the [Benefits Program Participation](#) link. Change the *Benefit Record Number* at the top of the page to **1**.
7. Click the Save  button.

8. Click the OK button if the message **Warning: FTE Salary is 0** is displayed.



Important! For all post-retirement DOF hires, you must enter the job title as an Additional Register Title (**REG**) on the Administrative Posts page (see “Updating Administrative Posts” on page 69). This ensures that the title will be displayed correctly in the online Directory.

Related Procedures:

- “Changing Biographic Data” on page 212, or “Updating Non-Campus Addresses and Contact Information” on page 222
- “Updating I-9 Status” on page 66
- “Updating Education” on page 87
- “Updating Administrative Posts” on page 69

Hiring Summer-Only Faculty

When faculty members are hired from the outside to teach a summer class, you must enter an employment instance for the summer faculty.

Note: Regular faculty who teach during the summer months will continue to be compensated with additional pay through the standard Summer Salary payment channels.

The staff category of Summer Faculty (Job Function **FS**) includes the following job codes and titles:

0450	Summer Lecturer
0480	Summer Lecturer with rank of Professor
0520	Summer Visiting Professor
0530	Summer Visiting Associate Professor
0540	Summer Visiting Assistant Professor
0650	Summer Visiting Lecturer

These ranks are to be used only for faculty hired and paid during July 1st through August 31st. If they need to extend beyond this time period, they will be transferred to a regular or visiting 10-month faculty rank. These summer ranks are not intended to be used for term faculty whose appointments are ending on June 30th but need an extension for either summer salary pay or health benefits coverage. These faculty members will be transferred to an appropriate researcher or visiting researcher rank, as needed.

The summer-only faculty appointments have a 2 month base, so the FTE salary is set at the equivalent of a 2 month salary at 100% time, which is paid in the monthly payroll at the end of one or both months. However, payments can be made for any time period or duty time within that 2 month period. All appointments to summer faculty ranks are non-benefits-eligible, since they are less than the 5 month minimum.

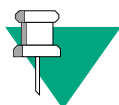
Tip! A 2-month, 100% person would equal 1.0 Summer Faculty FTE. A person working at 50% time for one month would equal .25 Summer Faculty FTE.


Before you start this procedure, make sure you have...

- Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Updating the Appointment Recommendation Page” on page 34)
- As needed, updated personal data (see “Updating Non-Campus Addresses and Contact Information” on page 222)
- For a former undergraduate or graduate student employee, determined that the status of the student record (**50, 51, or 60**) in Campus Community is **Terminated**, and that the termination date either matches or precedes the hire date (see “Checking University Affiliation(s)” on page 10)
- Determined that the person is not a former employee of Princeton University (see “Checking the Employee Record Number” on page 15).

To hire summer-only faculty:

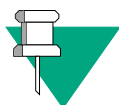
1. Select **Workforce Administration > Job Information > Add Employment Instance**.
2. On the Add page:
 - a) For *EmplID*, type the person’s PeopleSoft ID.



Note: Do not use the Lookup  button on the *EmplID* field, since the search will take a very long time!

Tip! If you just updated the Recommendation Status page, when you open this page, the person’s *EmplID* will be carried over.

- b) Leave the *Empl Rcd Nbr* as **0**.









Note: The *Empl Rcd Nbr* will default to the next highest number, so if the person is a former graduate student, the displayed number will be **61**. Be sure to change the number to **0** before proceeding.

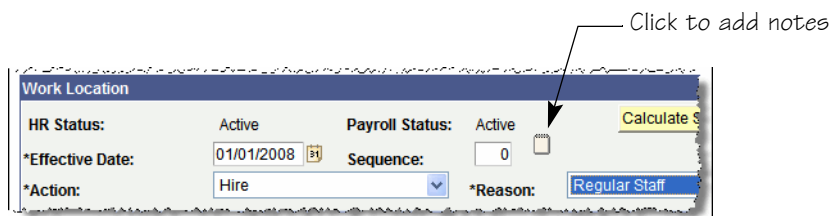
- c) Click the Add  button.


3. On the Work Location page:








Important! Do not click the Save  button or press the Enter key until you have entered **all** data on all pages.

- a) Type the *Effective Date* of the hire (July 1 or August 1), or click the Calendar  button to select the date.
 - b) Make sure *Job Indicator* is **Primary Job**.
 - c) Make sure the *Action* is **Hire** (default).
 - d) In the *Reason* field, select **Regular Staff** from the drop-down list.
 - e) Specify *Expected Job End Date* of either August 1 or September 1 in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
 - f) Leave *Position Number* blank.
 - g) Make sure *Business Unit* is **PUDOF** (Princeton Dean of Faculty). If not, type or select **PUDOF**.
 - h) Type the number of the *Department* where the employee will be working and press the Tab key, or click the Lookup  button to look up and select the department, for example, **107 Anthropology**.
 - i) Make sure the default *Mail Drop* is where the employee should receive pay checks and campus mail. If not, type the correct mail drop or click Lookup  to look up and select the mail drop.
4. If a comment or note is needed, enter it on the Job Data Notepad On the Work Location page, click the Maintain/View Notes  icon.



- j) On the Job Data Notepad, verify that the *Eff Date* is the date of the hire or relevant job action, and correct it if it is not.
- k) Click the Add a New Note  button.
- l) In the *Subject*, type a brief, succinct indication of what the comment is, for example, **Institutional Payment**.
- m) In the *Note Text* field, type the full note text, up to 100 characters, such as **Pay salary directly to Smithsonian Institution**.

- n) Click the Save  button to save the note, and then click the [Job Data Page](#) link to return to the Job Data page group.
5. Click the **Job Information** tab. On the Job Information page:
 - a) For *Job Code*, type the code that describes the employee's rank and press the Tab key, or click the Lookup  button to look up and select the job code, for example, **0480 Summer Lecturer w/rank Professor**.
 - b) The *Entry Date* defaults to the date of hire.
 - c) For *Regular/Temporary*, click the down  arrow and select **T=NoBen** since summer-only faculty are not eligible for benefits.
 - d) For *Full/Part*:
 - If the employee will have 100% *Duty Time*, leave the default **Full-Time**.
 - If the employee's *Duty Time* will be anything less than 100%, click the down  arrow and select **Part-Time**.
6. Click the **FTE Compensation** tab. On the FTE Compensation page:
 - a) For *FTE Salary*, type the full-time equivalent (FTE) annual salary, which would be a two-month salary for summer-only faculty. For a part-time employee, type the salary that would be earned if the employee worked full time for two months.
 - b) For *Actual Pay Periods*, type the number of actual months (**1** or **2**) for this employee.
 - c) For *Duty Time*, type the percentage of the full-time work week that the employee will work, for example, **50** if the employee will work half the week (you can specify up to three decimal places, if needed). Do not specify a percent sign (%).
7. Click the Save  button.
8. Complete all appropriate related procedures, below.

Related Procedures:

- To update the educational level of a summer faculty member, see “Updating Education” on page 87.
- To update the title of a summer faculty member, see “Updating Administrative Posts” on page 69.

Next Day Follow-Up:

- Audit (using printed audit reports run nightly)
- Appointment letter



Note: Department managers will receive an e-mail message notifying them that the data has been entered into the system.

Additional Non-Job Updates



<i>Updating I-9 Status</i>	<i>66</i>
<i>Updating Administrative Posts</i>	<i>69</i>
<i>Adding an Administrative Post</i>	<i>71</i>
<i>Updating an Administrative Post</i>	<i>74</i>
<i>Updating DOF Allowances</i>	<i>76</i>

Updating I-9 Status

When an employee's I-9 Employment Eligibility Verification form is received, it is processed in the Office of Human Resources, for citizens and non-citizens. Student I-9 forms are processed by the Office of Graduate Student Affairs or the Undergraduate Student Employment Office. Processing the I-9 form updates the employee's I-9 status in PeopleSoft.

***Tip!** The Office of the Dean of the Faculty does not typically complete these pages, but on occasion will do so if HR staff are not available and a payroll deadline is approaching.*

Who must complete the I-9 form?

All newly hired employees, including rehires, must complete and submit an I-9 Employment Eligibility Verification form. Non-citizen employees whose Visa status has expired and is being renewed must also complete and submit the I-9 form.



Note: Department managers are notified through e-mail every Monday morning of any outstanding I-9 forms for their employees.

I-9 Status Processing

When a hire, rehire, or NoPay to Pay action is processed on the Job Data pages, PeopleSoft automatically updates the I-9 Data page with a status of **No I-9**. This default prevents an employee from being paid until the I-9 form has been received, signed, verified, and processed.




***Tip!** You can search for a person by name on the I-9 Data page, but if more than one person has the same name, you may not be able to tell which is the person you want to update. In this case, you can use the Search by National ID component under Workforce Administration to find the person's EmplID using their Social Security number (SSN), which is on the I-9 form.*



To find an employee using the Social Security number:

1. Select **Workforce Administration > Personal Information > Biographical > Search by National ID**.
2. On the Search by National ID page:

- a) Enter the social security number in the National ID field in 999887777 format.
 - b) Make sure the Search in field is **Employees / Contingents / POI**.
 - c) Click the Search  button.
3. The employee's record is displayed. Highlight and copy the *EmplID* to use on the next Search page.




To update an employee's I-9 data:

1. Select **Workforce Administration > Job Information > Princeton Data > I9 Data**.
2. If you were already working on the record for this person, or found the person's record on the Search by National ID page, the *EmplID* will be displayed automatically on the Find an Existing Value page.

If the *EmplID* is not displayed, paste in the value you copied from the search, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

3. Select () *Include History*.
4. Click the Search  button. If multiple records are displayed, select the desired record by clicking on the link on that line.





Tip! If an employee has multiple records, you can select either the **0** or the **1** record; the I-9 data is not associated with a particular record number.

5. On the I-9 Data page:




Note: When a hire, rehire, or NoPay to Pay action is processed on Job Data, a row is inserted automatically on the I-9 Data page. The row has the effective date of the action, and the source code **S**.

- a) Click the Add  button in the right corner of the page to add another row.

- b) If the last action was a hire, rehire, or no-pay-to-pay action, the *Effective Date* defaults to the effective date of that action. For citizens, do not change this date.
- c) If you are adding a row after any other action, type the correct *Effective Date* date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
- d) If the last action was a hire, rehire, or no-pay-to-pay action, the *I-9 Status* field defaults to **Valid (ok to pay)**. For citizens, leave this value. Otherwise, select the appropriate status:

Valid (Ok to pay)	The I-9 form has been validated, and the employee can be paid. This value appears by default when you add the row.
Expired	The I-9 form on record has expired.
No I-9	The I-9 form has not been received and validated.
Not Required (Ok to pay)	The I-9 form is not required in order to pay this employee. This status applies to certain graduate students, and in some cases to employees hired before I-9s were required.

- 6. Click the Save  button, and file the form.

Updating Administrative Posts

Follow these steps to track Dean of Faculty (DOF) faculty administrative posts, and special titles for employees that are included in the online Directory.



Note: A person can have multiple active titles and posts at the same time.

Faculty member's posts or assignments can include:

- Chair of an Academic Department
- Academic Program Director
- Master of Residential College
- Professorship
- Preceptorship
- Joint Department Affiliation
- Faculty Emeriti

Special titles and department affiliations listed for employees in the *University Register* can include:

- Administrative titles
- Academic professional titles
- Faculty purchase titles for non-faculty staff members during their term of purchase

Update the Administrative Posts page when any of the following occur:

- A new employee is hired, or an employee receives a different administrative post or title.
- A professorship or preceptorship is awarded by the Board of Trustees.
- The Dean of the Faculty appoints an Academic Chair or Academic Program Director.
- The Dean of the College appoints a Residential Master.
- A faculty member has an official joint department or program affiliation that has been approved by the Dean of the Faculty.
- A retired or terminated tenured faculty member has been granted emeritus status.
- A special title or department affiliation has been granted, which should be included in the online Directory.

- A terminated, retired or deceased active employee has one or more open-ended titles that need an end date added to match their separation date so that the title is closed.

Adding an Administrative Post

When a person receives an administrative post or special title, update the Administrative Posts page.



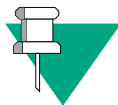
To add an Administrative Post:

1. Select **Workforce Development > Faculty Events > Track Events > Administrative Posts**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button.
3. If the new title is replacing a current title, make sure an *End Date* has been entered on the old title before inserting a new row for the new title (see “Updating an Administrative Post” on page 74).



Note: A person can have multiple active titles/posts at the same time.

4. If necessary, click the Add button to insert a new row into the record.
5. In the *Administrative Post* field, enter the type of administrative post using the Lookup button, or typing the code (in upper case):

CHAIR	Academic Chair (for Chairs and Acting Chairs only; Associate Chair is added as REG title)
FEMER	Faculty Emeriti
JOINT	Joint Department Affiliation (faculty only)
LIBEMER	Librarian Emeriti
MSTR	Master of Residential Colleges
PDIR	Academic Program Director (for Program Directors and Acting Program Directors)
PREC	Preceptorship

PROF	Endowed Professorship
REG	Additional Register Title

6. In the *Register Title Override* field, click the down arrow to select the type of override for the online Directory:

Additional	The title entered here will be used as an additional title, which will follow the employee's default title (from Job).
Both	The title entered here will replace both the default department and job description (from Job). If you want a department to appear in the online Directory, you must enter it as part of the title.
Department	The title entered here will replace the default department name, but not the default job title, which will come from Job.
Job	The title entered here will replace the default job description, but not the formal department name, which will come from Job.
Blank	For any title you do not want to list in the online Directory (such as the department of some faculty joint appointments).




Note: Leave *Register Title Override* field blank if this person has multiple administrative posts, such as a professorship and joint department. Add rows for both posts and leave them blank so they will not display.

7. Make sure *Appointment Type* is **Initial Appointment** (default).
8. In the *From Date* field, type the date when the appointment begins in *mm/dd/yyyy* format, or click the Calendar button to select the date.
9. Type the *End Date* of the post or title in *mm/dd/yyyy* format, or click the Calendar button to select the end date. *If the appointment is open-ended, leave this field blank.*
10. Leave the *Revision Date* and *Reason* fields blank. These fields are not used at Princeton.
11. Make sure the *SetID* field is appropriate for the employee (**PUDOF** for faculty).



Tip! The SetID is especially important for faculty joint appointments, because it determines the department codes available for selection when you specify the second department in Step 12.

12. If the appointment is a faculty joint appointment, click the Lookup  button to look up and select number of the *second* department in the *Department* field.




Note: For executive officers (such as president, provost, etc.) who have concurrent tenured faculty status and are jointly appointed in two academic departments in addition to their home administrative department, you must do the following to ensure that the officer is correctly displayed in the online Faculty Facebook under both academic departments:

- Have two separate rows (**JOINT**) for each academic department.
- On the “home” academic department, enter **Home Academic Dept while Executive Officer** in the *Organization* field.

13. If multiple posts of the same type are in effect with the same begin date, type a unique value (**1** or **2**, for example) in the *Organization* field.
14. In the *Comments* field, type the specific title text as it should appear in the online Directory or Faculty Facebook. Enter the specialty first for professors based in the Woodrow Wilson School, for example, **Public and International Affairs, Woodrow Wilson School**.



Tip! For professorships, the department name may or may not be a part of the formal name, or the department in the formal name may not be a recognized University department. In these cases, be sure to replace both the default job and department in the title. You might need to add the default title and/or department as a separate listing.

15. Repeat Step 3 through Step 14 if you need to add another post or title.
16. Click the Save  button.

Updating an Administrative Post

When an administrative post is changed or terminated, you must update the Administrative Posts page to reflect the changed status.



To update an Administrative Post:

1. Select **Workforce Development > Faculty Events > Track Events > Administrative Posts**.

2. On the Find page:

a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



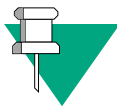
Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

b) Click the Search  button.

3. To add an End Date if an employee has retired, terminated, or died and the title needs to be closed:

a) If there are multiple posts for this employee, locate the current posts by clicking the [View All](#) link or scrolling through the titles using the navigation header arrows. Look for any titles with a blank *End Date* or a future *End Date* (greater than the current date).

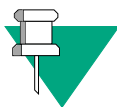
b) Enter the date of separation in the *End Date* field for each current post.






Note: This is particularly important for any faculty titles, such as CHAIR, JOINT, MSTR, PDIR, and PROF, as well as some of the faculty REG titles.

c) Click the Save  button.

4. To replace a current title with a new title:



Note: A person can have multiple active titles and posts at the same time. Be sure this is a correction to a current title, and not an additional title before proceeding.

- a) Locate the current title by clicking the [View All](#) link or scrolling through the titles using the navigation header arrows. Look for any titles with a blank *End Date* or a future *End Date* (greater than the current date).
 - b) Correct the information as needed.
 - c) Click the Save  button.
5. To end an out-of-date title and replace it with a new title:
- a) Verify that an *End Date* has been entered on the old title. If not, enter the date of the title change in the *End Date* field on the old title.
 - b) Insert a new row for the new title, by clicking the Add  button.
 - c) Enter the title information as described in “Adding an Administrative Post” on page 71, Step 5 through Step 14.
 - d) Click the Save  button.

Updating DOF Allowances

When you hire, rehire, or reappoint an employee, follow these steps to update allowances and fees, including:

- Institutional allowances for Postdoctoral Research Fellows or Visiting Fellows
- Moving allowances for employee hires or rehires

The allowance is indicated on an Appointment or Reappointment form, and is entered on the Business Expenses page, usually after a Job Data update.

Allowance and fee data is available as an on-demand report run by the sponsored research accounting manager (Finance). For a given data-entry date, the report summarizes adds, changes, and deletions to the data. This information is used to ensure that the appropriate Princeton University accounts will be charged.



To update allowances and fees:

1. Select **Workforce Administration > Job Information > Business Expenses**.





Tip! If you have just saved the Job Data pages, the Business Expense page for the staff member or employee will be displayed, and you can continue with Step 4. Otherwise, the Find an Existing Value page is displayed.

2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.





Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button. If multiple records are returned, select the appropriate *Empl Rcd # 0* record for the employee by clicking any link on the row.

3. On the Business Expenses page, if the staff member or employee has already received an allowance (in a prior expense period), click the Add  button in the Employee Business Expense Time section to add another expense period.
4. The *Expense Period End Date* defaults to today’s date. If this is not the date when the allowance cost begins, type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.



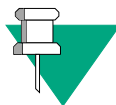
Note: This date must always match the effective date of the hire, rehire, or reappointment action.

5. In the *Charge Date* field, type the same date as the date in the *Expense Period End Date* field, in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
6. In the *Expense Code field*, click the down  arrow and select the appropriate code:


Inst Allow Institutional Allowance




Move Allow Moving Allowance

7. In the *Expense Amount* field, type the amount of the expense charged to a single account or institution.



Note: If the allowance is split between two or more accounts, enter the first account information and then insert a new row in the *Business Expense Details* area to enter information for another account (see Step 12).

8. The *Currency Code* field defaults to **USD** (US Dollars). Leave this value unchanged.
9. In the *Business Purpose* field, type the project/grant (account) number to be charged for the allowance, or the instruction on how it should be collected (for example, “Paid by fellow directly”).
10. In the *Business Unit* field, select your business unit (**PUDOF**).
11. In the *Department* field, type the home department of the employee, or select the department using the Lookup  button.

12. To add a row for an additional account, click the Add  button at the end of the current row (you may have to scroll right to see the button), and repeat Step 5 through Step 11.
13. To add an additional expense item of a different type but with the same effective date, click the Add  button at the end of the current row (you may have to scroll right to see the button), and repeat Step 5 through Step 12.
14. Click the Save  button.

Managing Profiles



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What's a Profile and What Is it Used For?

The Person Profile is a record associated with an individual that allows you to enter attributes and information about a person that are not directly related to their job information. Princeton's Person Profile data includes the following:

Education Data

You can enter an employee's degrees and areas of study in this area of the profile.

Suppress Home Address Listing

You can indicate that a person has requested that their home address remain private, not listed in any University directories (see "Specifying Name/Address Preference in the Directory," on page 94).

Non-default Mailing Lists

When a person is associated with Princeton, that person is automatically included in certain defined mailing lists, depending on specific attributes such as job code, duty time, and full/part status. You can add a person to a mailing list not assigned by default, or remove a person from a mailing list they would normally be on, by setting the mail code in the person's profile record (see "Adding or Removing a Person from a Mailing List," on page 96).

Working with Profiles

Before you can enter any profile information for an employee, you must associate that employee with the Princeton Person Profile. Once you have created a profile record for the person, you may add or update any information stored in the profile.

When you have entered the profile information, you must save and submit the changes. You will have several opportunities to review the changes, and even modify them, if necessary, before the final submission.

Creating a Princeton Person Profile for an Employee

Before you can enter any profile information for an employee, you must associate that employee with the Princeton Person Profile.



To associate an employee with the Princeton Person Profile:

1. Select **Workforce Development > Profile Management > Profiles > Person Profiles**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.





Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Make sure that the *Correct History* checkbox is selected (.
 - c) Click the Search button.
3. If matching values are returned, or the Person Profile opens, the person has already been associated with the Princeton Person Profile, and you may continue with your profile updates for the person.

If no matching values are returned, click the Add a New Value tab.



4. Click the Add button to display the Person Profile page. If you have already entered the person in Job Data, the values will default into the Add page, and you can skip to Step 9, on page 82. Otherwise, continue with the following steps.

5. In the *EmplID* field, type the ID if you know it, or use the Lookup  button to search for the person by name.
6. In the *Profile Type* field, type **Person**, or use the Lookup  button to select the **Person** profile.
7. Make sure the *Profile Status* is **Active**. You may change the *Status Date* to match the date of hire, but this is not required.
8. The *Description* field should contain either the default text **Person Profile**.
9. Continue with the particular profile attributes you need to update.



Tip! You can ignore the *Profile Groups* section on the profile pages. Princeton does not use this functionality.

Printing a Summary of the Person Profile

You can display and print a summary report of the Person Profile for an individual employee. The printed summary is useful for users with view-only access, who are not able to see the detail pages in the Person Profile. To display the summary, click the printer  button at the very bottom of the Person Profile page. The summary opens in a new browser window, in PDF format. You can print the summary using the print  button on the Acrobat toolbar.

Things You Should Know About Editing Profiles

The Person Profile includes several sections, not all of which are displayed at the same time. To work with a section, you may need to first select it from the light blue header above or below the displayed section(s)

Select the desired section from the header if it is not already displayed

To add a completely new row, click the link below the section

To add a new effective-dated row to an existing option, click the option link

Adding Rows to a Profile Section

Once in a section, you may add rows at two different levels. For example, to add a completely new row at the higher level, you click on the [Add New...](#) link just below the section. To add a new effective-dated row for an existing option, you open the option by clicking on the option link, and then add a new row.

Use the navigation header to scroll, if necessary


Update item details then click OK to apply changes and return. Click Cancel to return without any changes.

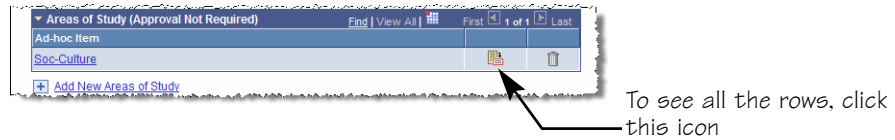
To add a new row at this level, click the Add Row button

Enter a new effective date, and the data for the new row

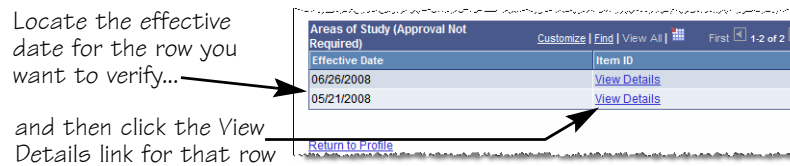
When you add a new effective-dated row this way, you may also want to inactivate the previous row. Use the navigation header to scroll back to the previous row and then change the *Status* to **Inactive**.

Viewing Hidden Profile Rows

When you add multiple rows at the lower level, you will only see the top row on the Person Profile page. However, there will now be an icon to View All Rows , displayed at the end of the row.



Clicking this icon opens the View All Rows page, which lists the effective dates of the rows, with a link to view the details of each row.



Clicking the [View Details](#) link opens the update page for that row. If desired, you can then use the navigation header to scroll through all the effective-dated rows for this option.


How Do I Know Where to Add Rows?

Add rows at the higher level if you are adding a completely new option, for example, a new degree of a unique type not already listed, or occasionally, a new area of study that will not replace an existing area of study.

Add rows at the lower level if you are changing the setting for an existing option, for example, if you are changing an area of study when the existing area of study no longer applies and correction isn't appropriate.

Saving and Submitting the Profile

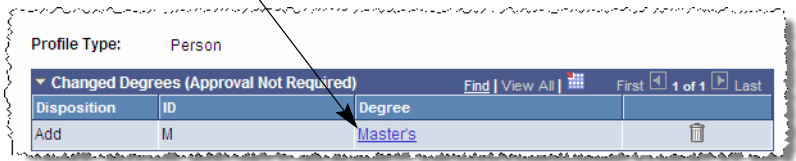
When you have entered **all** the profile changes you need to make for this person, you must save and submit the profile. You can make profile changes in any or all areas before submitting them. Saving and submitting profile changes is a three-step process:

1. Click the Save  button to save your changes. Notice, above the grey bar, the ☆ [n item\(s\) saved](#) link. This indicates that the items have been saved, but not submitted.



- a) To review the changes, click the ☆ [n item\(s\) saved](#) link. The Saved Items page is displayed, showing each of the changes.
- b) To see details about any individual change, click the link in that row. If the details are correct, click OK to return to the Saved Items page.

Click the link to see details



- c) To change any of the details, simply select the new value or type over the existing value, and click OK to return to the Saved Items page.
- d) Click OK again to return to the Person Profile page.




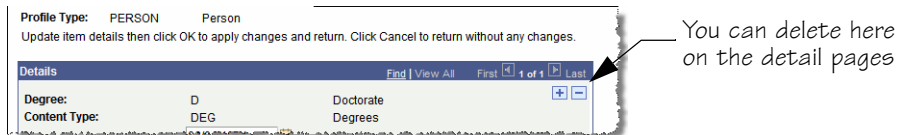
Tip! You may save profile changes as often as needed, but you should complete all your changes in the Person Profile before going through the final submit steps.


2. Click the Submit button to display the Summary of Changes page.
3. Review the changes, clicking the link on any row for which you want to see details. This opens the View page for the type of change you made. To close the View page, click the Cancel button.
4. If you are satisfied that the changes are correct, click the Submit button again.

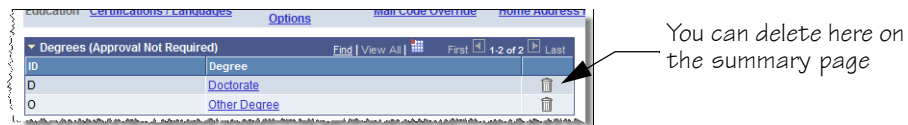
If you are not satisfied, you can Cancel the submit, and click the [n items saved](#) link to change any of the saved profile changes, as described in Step a through Step d of Step 1. When you are satisfied, click OK to return to the Person Profile page, and repeat Step 1 and Step 2 to save and submit the changes.

Deleting Profile Entries

On the detail pages, you may delete individual rows by clicking the Delete Row  button on the top right of the page.



You may also delete values on the Person Profile Summary page by clicking the Delete Row (garbage can)  icon next to the row you want to delete.



Important! If you delete a row on the summary page, *all* values, including multiple rows nested beneath, will be deleted.

Updating Education

Follow these steps to update the Education page when you hire a new employee, or when an employee or retiree (faculty emeriti) receives an additional educational or honorary degree.

An employee can use any of the following methods to notify the Office of the Dean of the Faculty (DOF) of a new educational degree or specialization:

- Submit a Personal Data form
- Submit a signed letter
- Make a phone call to the appropriate office
- E-mail the appropriate office
- Have the educational institution submit proof of the degree (for example, for assistant professors and postdoctoral appointments).



Note: Doctorates require proof of degree.


To add education data for a new hire:

1. Select **Workforce Development > Profile Management > Profiles > Person Profiles**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.






Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Make sure *Correct History* is selected (.
- c) Click the Search button.
 - If multiple records are returned, click the link to the appropriate record.
 - If no matching values are returned, associate the Princeton Person Profile with this employee as described beginning with Step 3 of “Working with Profiles,” on page 81.

3. If the Education area is not expanded, click the [Education](#) link in the grey bar.
4. Click the [Add New Degrees](#) link to open the Add New Degrees page.
5. In the *Degree* field, use the Lookup  button to locate and select the appropriate degree. For DOF employees, select only the 1-character codes (such as **B** for Bachelor's or **M** for Master's). (As needed, you will specify a translation for the highest degree in the *Educator* field of the terminal degree row, as described in Step g.)



Note: *If the employee does not have a degree, insert a row and indicate **N** for No College Degree.*

6. In the *Date Acquired* field, type the date when the degree was earned in *mm/dd/yyyy* format, or use the Calendar  button to select the date. If only the year is known, use June 1st of that year as the date.
7. In the *Country* field, use the Lookup  button to select the country where the degree was earned.
8. In the *School Code* field, use the Lookup  button to select the school that awarded the degree.



Tip! *If the Country Code is **USA**, you will be able to search for the School Code by state, and/or by entering all or part of the school name in the Description field on the Lookup page. There are only a few schools listed for universities outside the US.*

- When you select a code from the Lookup list, the *School* and *State* fields are filled in automatically.
 - **If the school is not listed** in the Lookup list or if the school is not an American school, leave the *School Code* field blank. In the *School* field at the bottom of the page, type the name of the school using upper and lower case (for example, **University of London** not **univ london**). In the *State* field, type or select the state where the school is located (if an American school).
9. If the individual graduated, you must select () *Graduated*.
 10. If this is the highest degree the individual has received,
 - a) Select () *Highest Education Level*.

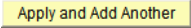


Tip! A person should have only one row with this indicator checked, but may have multiple rows with other degrees.

- b) Select () *Terminal Degree for Discipline* if appropriate. For example, an M.L.S. is the terminal degree for professional librarians, even if they have a Ph.D.
- c) Leave the *Issue Date* blank.
- d) In the *Educator* field, type the terminal degree in standard format (such as **M.A.**).
 - The *Degree* value of **D** automatically translates to **Ph.D.** For a different type of doctor's degree or other highest degree, type the exact degree or translation (such as **M.F.A.**).
 - If a person has multiple relevant professional degrees, they should all be entered on the terminal degree row for example, **M.L.S., Ph.D.**


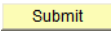
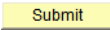



Note: The degree listed in the *Educator* field of the highest degree row will be listed in the Faculty Facebook, unless the degree is a doctorate (**D**), in which case **Ph.D.** will be listed instead.

11. If the individual has additional degrees, click the Apply and Add Another  button and repeat Step 5 through Step 9.

Note: If two degrees of the same type were acquired in the same year, you must enter a different *Date Acquired* for the second degree, or PeopleSoft will combine the two degrees when you submit the record.




12. When you have entered all the degrees, click the OK button to return to the Person Profile page.
13. For faculty members only, add the area of study:
 - a) Click the [Add New Areas of Study](#) link.
 - b) In the *Effective Date* field, enter the date of hire.
 - c) The *Status* defaults to **Active**.
 - d) In the *Area of Study* field, type the faculty member's field of specialization (25 characters or less).
 - e) Click the OK button to return to the Person Profile page.

14. Click the Save  button to save your changes. Notice, above the grey bar, the [n item\(s\) saved](#) link. This indicates that the items have been saved, but not submitted. If you click on this link, you can review and modify the changes.
15. Click the Submit  button to submit the profile change.
16. On the Summary of Changes page, review the changes, and if you are satisfied that they are correct, click the Submit  button again.




If you are not satisfied, you can Cancel  the submit, and click the [n items saved](#) link to change any of the saved profile changes. When you are satisfied, click OK to return to the Person Profile page, and repeat Step 14 and Step 15 to save and submit the changes.



To update a person's education:

1. Select **Workforce Development > Profile Management > Profiles > Person Profiles**.
2. On the Find page:
 - a) Type the *EmplID*, or type full or partial search information in the other search criteria fields.
 - b) Click the Search  button. If multiple records are returned, click the appropriate row to select the employee.
3. On the Person Profile page, if the Education area (Degrees and Area of Study) is not displayed, click the [Education](#) link in the grey bar.
4. Open the Add New Degrees or Update Degrees page as appropriate:
 - To add a new degree of a type not previously entered for this person, click the [Add New Degrees](#) link.
 - To add another degree of a type already present, click the link for the existing *Degree* and click the Add Row  button on the Update Degrees page.
 - To change a previously entered and submitted degree, click the link for the existing *Degree*.
5. For each degree, specify the following data:
 - a) In the *Degree* field, click Lookup  to look up and select the degree received.

For DOF employees, select only the 1-character codes (such as **B** for Bachelor's or **M** for Master's). (As needed, you will specify a translation for the highest degree in the *Educator* field of the highest degree row, as described in Step g.)

- b) In the *Date Acquired* field, type the date the degree was acquired in *mm/dd/yyyy* format, or click the Calendar  button to select the date. If the day and month are unknown, specify June 1st (**06/01/yy**) as the default.
- c) In the *Country* field, type **USA** for an American school, or click the Lookup  button to look up and select the *Country* where the school is located.
- d) In the *School Code* field, click the Lookup  button to look up and select the code representing the school that awarded the degree.



Tip! If the *Country Code* is **USA**, you will be able to search for the *School Code* by state, and/or by entering all or part of the school name in the *Description* field on the *Lookup* page.

- When you select a code from the Lookup list, the *School* and *State* fields are filled in automatically.
 - **If the school is not listed** in the Lookup list or if the school is not an American school, leave the *School Code* field blank. In the *School* field, type the name of the school using upper and lower case (for example, **Dartmouth** not dartmouth). If the school is an American school, type or select the state where the school is located in the *State* field.
- e) If the individual graduated, you must select () *Graduated*.
- f) If this is the highest degree the individual has received, select () *Highest Education Level* and, if appropriate, *Terminal Degree for Discipline* (for example, the M.L.S. degree for a librarian).



Tip! A person should have only one row with *Highest Education Level* indicator checked, but may have multiple rows with other degrees.

- g) In the *Educator* field on the highest degree row (selected () in Step f), type the highest degree in standard format (such as **M.A.**).
 - The *Degree* value of **D** automatically translates to **Ph.D.** For a different type of doctor's degree or other terminal degree, type the exact degree or translation (such as **M.F.A.**).

- If a person has multiple relevant professional degrees, they should all be entered on the terminal degree row for example, **M.L.S., Ph.D.**).



Note: The degree listed in the *Educator* field of the highest degree row will be listed in the Faculty Facebook, unless the degree is a doctorate (**D**), in which case **Ph.D.** will be listed instead.


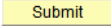
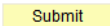
6. When you have entered all the degrees, click the OK button to return to the Person Profile page.
7. For faculty members, to add a new area of study or revise a current one:
 - a) Click the [Add New Areas of Study](#) link.
 - b) In the *Effective Date* field, enter the date when the new area of study is in effect.
 - c) Make sure the *Status* is **Active**.




Note: If you are adding a row for a new area of study, you must change the *Status* on the current row to **Inactive**. To edit an existing area of study, when you return to the Person Profile page, click the link for the Area of Study, make your changes, and click the OK button.

- d) In the *Area of Study* field, type the new field of specialization (25 characters or less).
- e) Click the OK button to return to the Person Profile page.

To edit an existing area of study, click the link for the Area of Study on the Person Profile page, make your changes, and click the OK button.

8. Click the Save  button to save your changes. Notice, above the grey bar, the [n item\(s\) saved](#) link. This indicates that the items have been saved, but not submitted. If you click on this link, you can review and modify the changes.
9. Click the Submit  button to submit the profile change.
10. On the Summary of Changes page, review the changes, and if you are satisfied that they are correct, click the Submit  button again.

If you are not satisfied, you can Cancel  the submit, and click the [n items saved](#) link to change any of the saved profile changes. When you are satisfied, click OK to return to the Person Profile page, and repeat Step 8 and Step 9 to save and submit the changes.

Specifying Name/Address Preference in the Directory

By default, the Princeton online Directory (and Faculty Facebook) regularly publishes the preferred name (if one exists, otherwise the primary name is used), department office location, and title information for all active regular or visiting Princeton University faculty members, academic professionals, and administrative and support staff members, and for all faculty emeriti, librarian emeriti, and administrative emeriti. The online Faculty Facebook also include highest degree(s).

If desired, the employee can specify different publishing preferences for the name and address:

Listing Under a Preferred Name

If an employee specifies a preferred name in addition to the primary, legal name (see “Adding or Updating a Preferred Name,” on page 237) the preferred name is used by default for the Princeton *University Register*.

Indicating a Private Home Address

Follow these steps to indicate that a person has requested that their home address remain private.






To indicate a private home address:


1. Select **Workforce Development > Profile Management > Profiles > Person Profiles**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.


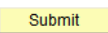
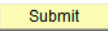


Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Make sure *Correct History* is selected (.
- c) Click the Search button.
 - If multiple records are returned, click the link to the appropriate record.

- If no matching values are returned, associate the Princeton Person Profile with this employee as described in “Working with Profiles,” on page 81.
3. Click the [Home Address Restriction](#) link in the grey header under the *Profile Actions* field. A note is displayed indicating that there are no home address restrictions for this profile.
 4. Click the [Add New home Address Restriction](#) link or  button.
 5. On the Add New Home Address Restriction page, use the Lookup  button to select **HOME_ADDRESS** for the *Address Restriction Option* field.
 6. In the *Effective Date* field, type the date when the restriction should begin in *m/d/yy* format, or use the Calendar  button to select the date.
 7. Select () *Restrict Home Address*.

Note: To remove a home address restriction, click the Delete Row  button on the address restriction row.

8. Click OK to return to the Person Profile page.
9. If you have made all the necessary changes to this profile, click the Save  button. The page is redisplayed with a star (★) and a link [n item\(s\) saved](#) just above the grey header below the Profile Actions field. You may click the link to see the details about the saved change.
10. If all is correct, click the Submit  button to submit the change. The Summary of Changes page is displayed, showing the type of change that was made, with a link to see the details of the each change.
11. Click the Submit  button again to submit your changes. The Person Profile is redisplayed, showing the Home Address Restriction.

Adding or Removing a Person from a Mailing List

Many of the mailings sent around campus are based on mailing lists which are updated nightly from the data contained in the PeopleSoft database. Examples of these mailing lists include the FVO (Voting Faculty) and the RR (Regular non-visiting Researchers) lists. Printing & Mailing uses these lists for both hard-copy and email distributions to the designated populations. In addition, DOF staff and select others can send email directly by using the listserve email addresses, which include the following:

DC*	Department Chairs (all academic chairs and acting chairs)
DC2	Program Directors (all academic program directors)
FVO	Voting faculty (receive all faculty meeting materials and ballots)
FSP	Special non-voting faculty (receive faculty meeting materials but not ballots)
FNV	Non-voting faculty (do not receive faculty meeting materials or ballots)
FR	All regular faculty, including executive officers and faculty purchases
FV	All visiting faculty
FE	Faculty Emeriti
	Note: Not all faculty emeriti use or have a Princeton email address.
RR	All regular researchers
RV	All visiting researchers (excluding fellows)
DF	All visiting fellows, postdoctoral research fellows, and visiting research collaborators
PDC	All postdoctoral research associates and postdoctoral research fellows
TR	All regular professional specialists
TV	All visiting professional specialists

LR	All regular librarians
LV	All visiting librarians
PUR	All faculty purchases from other staffs
DOF-ALL	All DOF staff members

* This and all following listserv addresses are @princeton.edu

In addition, other key mail codes are listed, such as:

PAW	Princeton Alumni Weekly
PWB	Princeton Weekly Bulletin

There are also some additional codes defined for HR and PPL, such as **OH** for Office Heads. These may also be used by DOF on occasion (for example, for a professional librarian who needs to be added to HR's **OH** list).



Important! Individual overrides to add or delete a person from a specific mailing list must be authorized by the dean of the faculty, because mailing codes are used for more than mailings. For example, assigning the **FVO** mail code gives a person access to vote in the Faculty Voting System.



Tip! If an HR person needs to be assigned a DOF mail code, this attribute is normally made a part of their position definition. For example, the President can have the FVO (Voting Faculty) code added as part of the position definition. This is a good solution for any situation where the mail code should be assigned to anyone holding the position, now or in the future.

Sometimes an individual prefers to have mailings that would normally be sent to their home address sent to a campus address instead (such as the PAW and PWB). To direct mailings to a campus address, add a **MAIL** address on the Personal Data pages with the campus address information (see “Updating Non-Campus Addresses and Contact Information,” on page 222).



To add or remove a person from a mailing list:

1. Select **Workforce Development > Profile Management > Profiles > Person Profiles**.

2. On the Find page:

- a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Make sure *Correct History* is selected ()
c) Click the Search button.
- If multiple records are returned, click the link to the appropriate record.
 - If no matching values are returned, associate the Princeton Person Profile with this employee as described beginning with Step 3 of “Creating a Princeton Person Profile for an Employee,” on page 81.

3. In the grey bar, click the [Mail Code Override](#) link. The display changes to show the mail codes.

4. Click the [Add New Mail Codes](#) link.

5. For *Mail Code*, click the Lookup button to select the desired mail code (the description appears next to each code).

6. In the *Effective Date* field, type the date when mailings should begin or end, or select the date using the Calendar button.


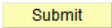
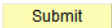
7. In the *Option* field,


- To add a person to a list they aren't already on by default, select **Send** from the drop-down list
- To remove an individual from a list they are on by default, select **Don't Send**.

8. In the *Comments* field, enter information relating to this change. For example, **Added to mailing list per the dean of the faculty on 5/22/08.**

9. To add another mail code override for the same person, click the Apply and Add Another button, and repeat Step 5 through Step 8.

10. When you have added all the mail code assignments, click the OK button. When you return to the Person Profile page, the mail code assignments are listed, with all the details.

- If the *Mail Code* is not correct, click the link for the incorrect code, and select the correct code as described in Step 5.
 - If the *Option* or *Comments* are not correct, you may fix them here. You may also spell-check the *Comments* on this page.
11. Click the Save  button to save your changes. Notice, above the grey bar, the [n item\(s\) saved](#) link. This indicates that the items have been saved, but not submitted. If you click on this link, you can review and modify the changes.
 12. Click the Submit  button to submit the profile change.
 13. On the Summary of Changes page, review the changes, and if you are satisfied that they are correct, click the Submit  button again.

If you are not satisfied, you can Cancel  the submit, and click the [n items saved](#) link to change any of the saved profile changes. When you are satisfied, click OK to return to the Person Profile page, and repeat Step 11 and Step 12 to save and submit the changes.

Related Procedure:

- If the person wants to have mailings that would normally be sent to their home address (such as the PAW and PWB) sent to a campus address instead, add a **MAIL** address on the Personal Data pages with the campus address information. See “Updating Non-Campus Addresses and Contact Information,” on page 222.






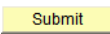
To remove an override to the default mail code assignments:


1. Select **Workforce Development > Profile Management > Profiles > Person Profiles**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Make sure *Correct History* is selected (.
- c) Click the Search  button.

- If multiple records are returned, click the link to the appropriate record.
 - If no matching values are returned, associate the Princeton Person Profile with this employee as described beginning with Step 3 of “Creating a Princeton Person Profile for an Employee,” on page 81.
3. In the grey bar, click the [Mail Code Override](#) link. The display changes to show the mail codes.
 4. Locate the mail code for which you want to remove the override, and click the Delete Row  button on that row.
 5. Click the Save  button to save your changes. Notice, above the grey bar, the [n item\(s\) saved](#) link. This indicates that the items have been saved, but not submitted. If you click on this link, you can review and modify the changes.
 6. Click the Submit  button to submit the profile change.
 7. On the Summary of Changes page, review the changes, and if you are satisfied that they are correct, click the Submit  button again.

If you are not satisfied, you can Cancel  the submit, and click the [n items saved](#) link to change any of the saved profile changes. When you are satisfied, click OK to return to the Person Profile page, and repeat Step 5 and Step 6 to save and submit the changes.

DOF Secondary Appointments (Faculty Purchase)



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<i>Working with Two Employee Instances</i>	<i>102</i>
<i>Tracking the Faculty Purchase Recommendation</i>	<i>104</i>
<i>Logging and Tracking the Recommendation</i>	<i>105</i>
<i>Logging the Faculty Purchase Recommendation</i>	<i>105</i>
<i>Entering the Decision and Final Action</i>	<i>107</i>
<i>Updating Record 0 for a Faculty Purchase</i>	<i>110</i>
<i>Adjusting Record 0 for Changes in Duty Time or Pay</i>	<i>111</i>
<i>Adjusting Record 0 for the End of the Purchase</i>	<i>114</i>
<i>Adding or Updating the Purchase Record</i>	<i>115</i>
<i>Adding a Record 1 for a First-Time Faculty Purchase</i>	<i>115</i>
<i>Updating Record 1 for a Subsequent Faculty Purchase</i>	<i>120</i>

Overview of the Faculty Purchase Process

A faculty purchase allows a department to hire a non-faculty, active, regular or visiting, monthly employee as a part-time faculty member for a specified term. Biweekly staff are not eligible.

Working with Two Employee Instances

When an active non-faculty monthly employee, either in a regular or visiting rank, needs to be purchased part-time as a faculty member for a term appointment, the employee is given a faculty secondary appointment. In this case, the employee's primary record (the **0** record) continues to reflect the regular position, and a **1** record is created to reflect the specifics of the faculty purchase, such as department, rank, FTE salary, duty time, number of pays, and special titles.

If there are any changes to compensation or duty time as a result of a faculty purchase, these changes must be made on the employee's primary **0** record, since no salary payments are made from the **1** record for faculty purchases. Thus there are often two records to be updated (or one to be updated and one to be created) for a faculty purchase or secondary appointment action.

- ✧ If temporary adjustments need to be made to the FTE salary or duty time during the period of the purchase, a special *Action/Reason* code of **Pay Rate Change/Secondary Appt** is used on the employee's **0** record to indicate the salary adjustment at the start and end of the faculty purchase. The employee is paid based on the information in the **0** record.

The updates are more complex when the person being purchased is either not paid (the **0** record is **NoPay**), or paid a stipend. For details on how to update the **0** record, including information on handling these special circumstances, see "Updating Record 0 for a Faculty Purchase" on page 110.

- ✧ The job data about the secondary appointment is entered on the employee's **1** record. The purchase record (record **1**) provides data to the budget systems (Labor Accounting and Teaching Budget) on salary allocations for faculty and which department is paying the teaching cost. Because the employee is paid from the **0** record, the purchase record (record **1**) always specifies the **NCX** (No pay) pay group.

- If the staff member has not previously had a record **1**, you will have to create one, as described in “Adding a Record 1 for a First-Time Faculty Purchase” on page 115.
- If the staff member has a previous record **1**, you must update it, as described in “Updating Record 1 for a Subsequent Faculty Purchase” on page 120.
- The termination row for the **1** record is always entered **at the same time** as the hire or rehire action, to provide accurate data to the budget systems.

The following actions may be entered on the **1** record to reflect the faculty purchase:

Use	When
Hire/Secondary Appt	The employee is purchased as a faculty member for the first time.
Rehire/Secondary Appt	An employee who has been purchased as a faculty member before is purchased again.
Pay Rate Change/Change Duty Time/Number Pays	The duty time for the purchase changes in mid-appointment.
Transfer/Reappointment	A person appointed in the fall term is reappointed in the spring term.
Transfer/Dept Transfer	A person appointed in the fall term is being appointed in a different department in the spring term.
Termination/End of Appointment	The secondary appointment (faculty purchase) is ended

Processing a Termination Separately

Usually the termination of a faculty purchase is entered when the purchase is entered (see “Adding or Updating the Purchase Record” on page 115). However, you may need to process the termination separately in these situations:

- If the termination date changes, you will need to delete the existing termination row, adjust the **1** record, and add a new termination row.
- If the employee’s **0** record is to be terminated before the end of the purchase, the remainder of the faculty appointment is shifted to the **0** record, and the **1** record is terminated instead. Then, when the appointment is completed, the **0** record can be terminated.

To terminate the purchase separately, use the procedure in “Terminating a Secondary or Post-Retirement Job” on page 201.

Tracking the Faculty Purchase Recommendation

An employee can be purchased from any non-faculty monthly staff group in any business area, including Human Resources, the Plasma Physics Lab, or the academic professionals in the Dean of the Faculty's Office. For instructions on determining the status of an employee recommended for a faculty purchase, and whether they are eligible to be purchased, see "Determining How to Hire" on page 2.

When you have determined that an employee is eligible to be hired into a secondary appointment, the faculty purchase recommendation must be logged on the Recommendation Status page group.

Note: If, after searching Campus Community, you find that the employee is not appointed through the Dean of the Faculty's Office, you will still be able to log the recommendation on the Recommendation Status page. However, you will need the assistance of your system manager to proceed with the job record updates.

Logging and Tracking the Recommendation

This section explains how to track appointment recommendations for faculty purchases.

Faculty purchases are usually at the rank of lecturer (or occasionally, a visiting faculty rank). Because this rank does not require an acceptance letter, there is no need to wait for the receipt of an acceptance letter before you enter the final action on the Recommendation Status page.

Logging the Faculty Purchase Recommendation

When an Appointment Recommendation form for a faculty purchase is received by the Office of the Dean of the Faculty, follow these steps to log the recommendation on the Recommendation Status pages. Enter the date the recommendation was received on the Approval Status page, and the information about the recommended purchase on the Appointment Information page.

To log a faculty purchase recommendation:

1. Select **Workforce Administration > Job Information > Princeton Data > Recommendation Status**.

2. On the Find page, you can search by any one of the following fields:

EmplID The ID number assigned when the person was added to PeopleSoft.

Name Enter the person's first initial or first name in combination with the *Last Name*. To enter the person's full name here, use the format *first last*.

Last Name The person's last name only.







National ID The person's Social Security number.

3. Type a full or partial search value, and click the Search button.

- If only one record matches your search criteria, the record is displayed on the Recommendation page.

- If multiple records match your search criteria, a list of matching records is displayed. Select the desired record by clicking on the link on that line.

The Approval Status page of the Recommendation Status page group is displayed.

4. If necessary, click the Add  button to insert a new row for this appointment recommendation. The Approval Status page is redisplayed with the current date in *Date Received*, and all other fields blank.
5. If the recommendation form was *not* received on the current date, type the date when it was received in the *Date Received* field in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
6. In the *Business Unit* field, type **PUDOF**.
7. For *Department*, type the department number where the employee will be teaching, or use the Lookup  button to select the department number. This is often different from their home department.
8. Click the **Appointment Info** tab to display the Appointment Information page.
9. In the *Action Rec* field, select **Purchase** from the drop-down list.
10. For *Appt Start Date*, type the date when the purchase appointment will begin in *mm/dd/yyyy* format, or click the Calendar  button to select the date. This date should always be either September 1 or February 1.
11. For *Appt End Date*, type the date when the purchase will end in *mm/dd/yyyy* format, or click the Calendar  button to select the date. All purchases must have an end date, usually February 1 or July 1.
12. For *Job Code*, type the recommended faculty job code, or click the Lookup  button to look up and select the job code. You should enter a value here, even if the job code is not changing.
13. If you know it, type the recommended FTE salary for the faculty purchase in the *FTE Salary* field. Otherwise, leave this field blank.
14. For *Duty Time*, type the recommended duty time, or leave the field blank if the duty time is unknown.
15. In the *Number of Pays* field, type the recommended number of pays, usually either **5** or **10**.

16. If necessary, you can enter text information about this recommendation, or note changes to the initial recommendation, in the *Notes* field.

Tip! The *Notes* field is used when the initial appointment is not approved “as is” and requires modification.

17. Click the Save  button to log the recommendation.


Entering the Decision and Final Action

When a decision on the purchase has been approved, enter the decision and the final action data on the Approval Status page of the Recommendation Status page group.


To finalize the purchase recommendation:

1. When a decision on the purchase has been approved, select **Workforce Administration > Job Information > Princeton Data > Recommendation Status**.
2. On the Find page, enter any one of the following *Search By* criterion:

EmplID	The ID number assigned when the person was added to PeopleSoft
Name	Enter the person’s first initial or first name in combination with the <i>Last Name</i> . To enter the person’s full name here, use the format <i>first last</i> .
Last Name	The person’s last name only
National ID	The person’s Social Security number

3. Type a full or partial search value, and click the Search  button.
 - If only one record matches your search criteria, the record is displayed on the Recommendation page.
 - If multiple records match your search criteria, a list of matching records is displayed. Select the desired record by clicking on the link on that line.

The Approval Status page of the Recommendation Status page group is displayed.


4. If there are multiple rows in the recommendation, select the row relating to this purchase action using the arrows in the header navigation controls .

Tip! To display information that will help you determine which is the correct recommendation, click the *Appointment Info* tab.


5. In the *Decision* field (on the Approval Status page), select the decision:

- Appr Modif** The decision has been approved, but with modifications to the original recommendation
- Approved** The decision has been approved as recommended
- Not Apprvd** The decision has not been approved

Tip! This field provides important information to the academic departments and the Visa Office.

6. In the *Decision Date* field, type the date when the decision was made in *mm/dd/yyyy* format, or click the Calendar  button to select the date from a calendar page.
7. In the *Decision By* field, type the initials of the person making the decision.
8. In the *Final Action* field, select the appropriate value:

- Processed** If the action has been approved and the Job Data pages have been or will be updated immediately.
- Closed** If the action has not been approved, the request has been cancelled, or the person has declined the appointment.

9. In the *Action Date* field, type the processing date (usually the current date) in *mm/dd/yyyy* format, or click the Calendar  button to select the date.

Note: Only those staff members who can process updates on Job pages should update the *Final Action* and *Action Date* fields.

10. Click the Save  button to save the decision data.

Related Procedures:

- If the employee is in a DOF academic professional rank, you may proceed with processing the secondary appointment (see “Updating Record 0 for a Faculty Purchase” on page 110).

Important! *If the employee is **not** in a DOF academic professional rank, you will need the assistance of your system manager to determine the appropriate salary level, and to determine whether any adjustments to duty time are required.*

Updating Record 0 for a Faculty Purchase

The procedures in this section describe how to update an employee's primary record **0** for a faculty purchase, including:

- “Adjusting Record 0 for Changes in Duty Time or Pay” on page 111
- “Adjusting Record 0 for the End of the Purchase” on page 114

Record 0 Updates Might Not Be Required . . .

In some cases, a faculty purchase requires no changes to the **0** record—specifically if the employee works full time, and makes a salary high enough to be equivalent to or greater than the minimum faculty level. If that is the case, you will not need to update the **0** record, and may proceed to “Adding or Updating the Purchase Record” on page 115.

Important! *If the employee is **not** in a DOF non-faculty rank, you will need the assistance of your system manager to determine the appropriate salary level, and to determine whether any adjustments to duty time are required on the **0** record.*

Is the **0** record NoPay?

If the person being purchased is **not** paid (the **0** record is **NoPay**), that person is normally transferred to the faculty rank for the term they will be teaching, and is then transferred back to their original appointment at the end of the teaching term (see “Entering Promotions, Transfers, or Reclassifications” on page 133).

Important! *If this action would change a person's benefits-eligibility status, check with your system manager before proceeding.*

Adjusting Record 0 for Changes in Duty Time or Pay

If the faculty purchase requires a temporary adjustment in pay and/or an adjustment in duty time for a part-time employee, you must update the employee's **0** record. For example, any of the following would require an adjustment in pay:

- Pay increase
- Pay in addition to a stipend
- Reallocation of a portion of a stipend to wages.

Important! Stipend payments, often paid to Postdoctoral Research Fellows and Visiting Fellows, **cannot** be allocated to compensate for teaching duties. In these cases, a wage supplement covering the faculty salary portion must be added and distributed on the Earnings Distribution page of the Job Data pages.

As soon as you have entered the updates to the **0** record for the start of the faculty purchase, you must add a future-dated row on the **0** record to reflect the change back to the regular pay and/or duty time. This should be done even if the *Expected Job End Date* for the **0** record matches the end date of the purchase.

Before you start this procedure, make sure you have...



- Logged the Appointment Recommendation (see “Logging the Faculty Purchase Recommendation” on page 105).
- Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Entering the Decision and Final Action” on page 107).

To update the 0 record for a faculty purchase:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type full or partial search values in any of the search criteria fields.
 - b) Click the Search button.

- c) Select the **0** record for the employee by clicking on any link in the record **0** row.

Note: If a **0** record is not returned for this employee, see your system manager. You might not have access to this employee's primary record.


3. On the Work Location page, click the Add  button to insert a new row into the record.
4. In the *Effective Date* field, type the date when the faculty purchase begins, in *mm/dd/yyyy* format, or click the Calendar  button to select the date. For correct budget calculations to be made, you must specify either September 1 or February 1.
5. If a job row already exists with the same effective date, type the next sequential number in the *Effective Sequence* field.
6. In the *Action* field, select **Pay Rate Change**.
7. In the *Reason* field, select **Secondary Appt** from the drop-down list.
8. Verify that the *Expected Job End Date* is not earlier than the end date of the faculty purchase. If it is earlier, see your system manager. The employee's home department will need to be contacted to discover whether or not they intend to extend the **0** record appointment.
9. Click the **FTE Compensation** tab.
10. On the FTE Compensation page, if the salary is changing due to the secondary appointment, type the employee's new full-time equivalent salary in the *FTE Salary* field. A spreadsheet showing the appropriate salary value will be provided by an Associate Dean.
11. If the duty time is changing due to the secondary appointment, type the percentage of the full-time work week that the employee will work (for example, **83.33**) in the *Duty Time* field.

Note: This is the employee's **total** duty time, not just the time spent teaching.

12. If the earnings distribution is changing because of the secondary appointment (% stipend or % wages is changing):
 - a) Click the [Earnings Distribution](#) link.

- b) On the Earnings Distribution page:
- Make sure the *Earnings Distribution Type* is **By Amount**.
 - Change the distributions as appropriate, using the *Earn Code* of **170** for stipend and **171** for wages.
 - Type the monthly amount in the *Compensation Rate* field.



Note: Stipends *cannot* be used for purchase payments. Only wages can be used, and must be coded as *Earn Code* **001** or **171**.

13. Click the Save  button to save the changes to the **0** record.
14. Continue with “Adjusting Record 0 for the End of the Purchase” on page 114.

Adjusting Record 0 for the End of the Purchase

As soon as you have entered the updates to the **0** record for the start of the faculty purchase, you must add a future-dated row on the **0** record to reflect the change *back* to the regular pay and/or duty time. This should be done even if the *Expected Job End Date* for the **0** record matches the end date of the purchase.

To adjust the **0** record at the end of a faculty purchase:

1. If you are not already displaying the employee's **0** record on the Job Data page group, select **Workforce Administration > Job Information > Job Data**, and bring up the employee's **0** record.
2. On the Work Location page, click the Add  button to insert a new row.
3. In the *Effective Date* field, type or select the effective date that matches the faculty purchase termination date (normally, February 1 or July 1).
4. In the *Action* field, select **Pay Rate Chg.**
5. In the *Reason* field, select **Secondary Appt.**
6. Click the **FTE Compensation** tab.
7. If the salary is changing due to the end of the secondary appointment, type the employee's original full-time-equivalent salary in the *FTE Salary* field.
8. If the duty time is changing due to the end of the secondary appointment, type the percentage of the full-time work week the employee will work (for example, **50**) in the *Duty Time* field.
9. If the earnings distribution is changing because the employee is no longer teaching, click the [Earnings Distribution](#) link. Adjust the distributions to reflect the pre-purchase values by either:
 - selecting **None** for the *Earnings Distribution Type* (click OK when the warning about changing the earnings distribution type appears), or
 - adjusting the distributions as needed, entering the appropriate values in the *Earn Code* fields.
10. Click the Save  button.

Adding or Updating the Purchase Record

If this is the first time the employee has been purchased, you will need to add a purchase record (employee record **1**). If the employee has been purchased before, you can simply update the existing **1** record by inserting a new row. When you have added or updated the **1** record for the purchase, you must immediately enter the termination row for the purchase.

Note: If a person's primary job is terminated before the end of a secondary appointment, you must terminate the **1** record for the secondary appointment (see "Terminating a Secondary or Post-Retirement Job" on page 201), and then move the data on the secondary appointment to the **0** record (see "Entering Promotions, Transfers, or Reclassifications" on page 133). When the secondary appointment ends, you can terminate the **0** record.


Adding a Record 1 for a First-Time Faculty Purchase

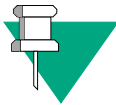
Follow these steps to hire, for the first time, a non-faculty employee into a secondary faculty purchase appointment. Use this procedure only if you are creating a *new* record **1** for an employee who has not previously held a secondary appointment. If you are repurchasing an employee who has been purchased before, see "Updating Record 1 for a Subsequent Faculty Purchase" on page 120.

Before you start this procedure, make sure you have...


- *Logged the appointment recommendation for the faculty purchase (see "Logging the Faculty Purchase Recommendation" on page 105).*
- *Updated the Recommendation Status page for this appointment with a final action of **Processed** (see "Entering the Decision and Final Action" on page 107).*
- *Made any necessary adjustments to the employee's **0** record (see "Updating Record 0 for a Faculty Purchase" on page 110).*

To add a secondary DOF faculty appointment:


1. Select **Workforce Administration > Job Information > Add Employment Instance**.
2. On the Search page:
 - a) Type the employee's ID in *EmplID*, or use the Lookup  button to search for the employee by name.
 - b) For *Empl Rcd Nbr*, type 1.




Note: The *Empl Rcd Nbr* will default to the next highest number, so, for example, if the person is a former graduate student, the displayed number will be **61**. Be sure to change the number to **1** before proceeding.

- c) Click the Add  button.
3. On the Work Location page:






Important! Do not click the  button or press the *Enter* key until you have entered **all** data on all pages.

- a) Type the *Effective Date* of the this faculty purchase in *mm/dd/yyyy* format, or click the Calendar  button to select the effective start date.



Important! For budget system interfaces to work correctly, the start date must be either *September 1* or *February 1*.

- b) Make sure *Job Indicator* is **Secondary Job**.
 - c) Make sure *Action* is **Hire** (default).
 - d) In the *Reason* field, select **Secondary Appointment** from the drop-down list.
 - e) Type the *Expected Job End Date* in *mm/dd/yyyy* format, or click the Calendar  button to select the estimated end date. For faculty purchases, the expected job end date is always either February 1 or July 1.

Tip! The expected job end date is the day after the last expected day of work. For example, if the purchase is expected to extend through 1/31/2009, the expected job end date would be 2/1/2009.

- f) Make sure *Business Unit* is **PUDOF** (Princeton Dean of Faculty). If not, type or select **PUDOF**.
 - g) Type the number of the *Department* making the faculty purchase, or click Lookup  to look up and select the department.
 - h) Leave the default value in the *Mail Drop* field, since the system uses the value in the **0** record for this field.
4. Click the **Job Information** tab. On the Job Information page:
- a) Type the appropriate *Job Code*, usually **0050** (for Lecturer). If the purchase is not for a lecturer, click the Lookup  button to look up and select the faculty job code indicated on the appointment form.
 - b) For *Regular/Temporary*, click the down  arrow and select **T=NoBen**. (Benefits are calculated based on the **0** record, not the **1** record.) The system will display a warning that you have linked a temporary employee to a regular job code. Click the OK  button and continue.
 - c) For *Full/Part*, click the down  arrow and select **Part-Time**.

Note: Always specify **Part-Time**, even if all of the salary on the **0** record is allocated for the purchase (that is, the purchase is for 100% of the employee's time).

5. Click the **Payroll** tab. On the Payroll page:
- a) For *Pay Group*, type **NCX** or click the Lookup  button to look up and select the **NCX Non-Paid Paygroup** value.
 - b) When you see the message **Paygroup NCX is not the default for Jobcode nnnn**, click the OK  button.
6. Click the **FTE Compensation** tab and enter the FTE information for the secondary appointment:
- a) For *FTE Salary*, enter the appropriate value, based on the following conditions:
 - If no salary adjustments are needed to the **0** record, type a value that is 10/12 of the employee's regular FTE salary (indicated on the **0** record).
 - If the salary is adjusted on the **0** record, the FTE salary should be the rate that would normally be paid if this person were faculty only. Make sure that the actual salary calculated on the **1** record matches the adjusted amount on the **0** record.




Tip! If the person is not in the PUDOF business unit, you will need to ask your system manager to look up and calculate this value for you. Otherwise, click the [New Window](#) link. In the new window, you can open the employee's Job Data **0** record to obtain the regular salary and make your calculation. Spreadsheets are available that can be used to calculate these figures.



- b) For *Actual Pay Periods*, type either **5** or **10** depending on the length of the appointment.

Important! The number of actual pay periods per year cannot exceed the number of base periods (10 for faculty) per year.




- c) For *Duty Time*, type a percentage that will generate the correct actual salary figure. If the purchase is for 0% time, enter **1** as a default. The system will not accept a value less than 1% in the *Duty Time* field.

Important! The actual salary paid for the purchase should match what is budgeted for the purchase.

The system displays a warning that the total FTE of active appointments for the employee has exceeded 1.0. Click the OK  button and continue.

7. Select *Faculty Purchase*. Because you have not yet entered a *Benefit Record Number*, the system displays a warning that there are incorrect faculty purchase settings. Click  and continue.
8. Click the [Benefits Program Participation](#) link. For *Benefit Record Number*, type **1**.
9. Click the Save  button.
10. To ensure that budget information is correct, complete the procedure by entering the termination of the faculty purchase as a future-dated action immediately.
- a) Click the [Job Data](#) menu link on the left menu.

Tip! Clicking the [Job Data](#) link at the bottom of the page will not allow you to enter a **Termination** action. You must use the menu to navigate back to the Job Data page.

- b) On the Search page, type the *EmplID*, and enter **1** for the *Empl Rcd Nbr*. Click the Search  button.
- c) On the Work Location page, click the Add  button to add a new row for the termination.
- d) For *Effective Date*, type or select the date when the appointment ends (must be either February 1 or July 1).
- e) Enter an *Action* of **Termination** and a *Reason* of **End of Appointment**.
- f) Click the Save  button to save the termination action.

Related Procedures:

To complete the hiring process for a faculty purchase:

- Update the person's education data and area of study (required for faculty). See "Updating Education" on page 87.
- Add the employee's faculty title for the duration of the purchase. See "Updating Administrative Posts" on page 69.

Updating Record 1 for a Subsequent Faculty Purchase

If the employee has been purchased previously, or has an active purchase record, update the employee's record **1** with the new purchase information. At the same time, you can future-date the termination of the secondary appointment.


Before you start this procedure, make sure you have...

- *Logged the Appointment Recommendation (see “Logging the Faculty Purchase Recommendation” on page 105).*
- *Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Entering the Decision and Final Action” on page 107).*
- *Determined that an Empl Rec 1 that is defined as a faculty purchase already exists for this person.*
- *Made any necessary adjustments to the employee's 0 record (see “Updating Record 0 for a Faculty Purchase” on page 110).*


To update an existing record 1 for a faculty purchase:

1. If you have just updated the **0** record for this employee, click the Return to Search  button, and select the employee's **1** record.

If this employee's **0** record did not need updating:

- a) Select **Workforce Administration > Job Information > Job Data**.
- b) On the Find page, type full or partial search criteria in any of the search fields, and click the Search  button.


***Tip!** You can type a **1** in the Empl Rcd Nbr search field to restrict the search results to the **1** record.*

- c) Select the **1** record for the employee by clicking on any link in the row.
2. When the Work Location page is displayed, click the Add  button to insert a new row into the record.
 3. In the *Effective Date* field, type or select the date when the faculty purchase rehire or change begins. For correct budget calculations to be made, you must specify either September 1, or February 1.


4. In the *Job Indicator* field, select **Secondary Job**.
5. In the *Action* and *Reason* fields, select:

Action	Reason	If...
Rehire	Secondary Appointment	This is a purchase rehire after a break in service.
Pay Rate Change	Change Duty Time/ Number Pays	The purchase duty time is changing mid-appointment.
Transfer	Dept Transfer	The person is switching departments between the fall and spring terms. <i>Tip! You may need to delete a future-dated termination row before proceeding with a Transfer action.</i>
Transfer	Reappointment	A person appointed in the fall term is reappointed in the spring term. <i>Tip! You may need to delete a future-dated termination row before proceeding with a Transfer action.</i>


Note: An employee cannot be purchased as a faculty member over the summer, so a rehire is used rather than a reappointment when an employee is purchased for the spring term and the following fall term.


6. Type the *Expected Job End Date* of the purchase in *mm/dd/yyyy* format, or click the Calendar  button to select the date. For faculty purchases, the estimated end date is always either February 1 or July 1.

Tip! The estimated appointment end date is the day after the last expected day of work. For example, if the purchase is expected to extend through 1/31/2009, the estimated appointment end date would be 2/1/2009.


7. Make sure *Business Unit* is **PUDOF**.
8. In the *Department* field, type the department number of the department where the employee will be teaching, or click Lookup  to look up and select the department.
9. Leave the default value in the *Mail Drop* field, since the system uses the value in the **0** record for this field.

10. Click the **Job Information** tab, and enter the information for the rehire or update:


- a) If the *Job Code* has changed from the previous row, type in the new value (normally **0050** for Lecturer), or click the Lookup  button to select the appropriate job code if the purchase is for another faculty rank.

The system will display a warning message that a change to the *Job Code* field may affect the numbers on the FTE Compensation page. Click the OK  button and continue.

- b) In the *Regular/Temporary* field, be sure that **T=NoBen** is selected. (Benefits are calculated based on the **0** record, not the **1** record.)

The system will display a warning that you have linked a temporary employee to a regular job code. Click the OK  button and continue.

- c) In the *Full/Part* field, be sure that **Part-Time** is selected, even if all the salary is being allocated to teaching and the person's duty time is 100% on the **1** record.

11. Click the **Payroll** tab, and verify that the *Pay Group* is **NCX**. If it is not already **NCX**, type **NCX** in the *Pay Group* field. A warning will be displayed, indicating that NCX is not the default for this job code. Click the OK  button and continue.

12. Click the **FTE Compensation** tab, and enter the information for the faculty purchase:

- a) For *FTE Salary*, enter the appropriate value, based on the following conditions:

- If no salary adjustments are needed to the **0** record, type a value that is 10/12 of the employee's regular FTE salary (indicated on the **0** record).
- If the salary is adjusted on the **0** record, the FTE salary should be the rate that would normally be paid if this person were faculty only. Make sure that the actual salary calculated on the **1** record matches the adjusted amount on the **0** record.




Tip! *If the person is not in the PUDOF business unit, you will need to ask your system manager to look up and calculate this value for you. Otherwise, click the [New Window](#) link. In the new window, you can open the employee's Job Data **0** record to obtain the regular salary and make your calculation. Spreadsheets are available that can be used to calculate these figures.*


- b) Type the number of *Actual Pay Periods* for the secondary appointment—**5** or **10**.




Important! *The number of actual pay periods per year cannot exceed the number of base periods (10 for faculty) per year.*

- c) In the *Duty Time* field, type the value that will generate the correct salary figures. If the purchase is for 0% time, enter **1** as a default. The system will not accept a value less than 1% in the *Duty Time* field.

Important! *The actual salary paid for the purchase should match what is budgeted for the purchase.*

The system displays a warning that the total FTE of active appointments for the employee has exceeded 1.0. Click the  button and continue.

- d) Be sure the *Faculty Purchase* checkbox is selected (). If not, click the checkbox to select it. The system displays a warning that there are incorrect faculty purchase settings. Click  and continue.

13. Click the [Benefits Program Participation](#) link, and make sure that the *Benefit Record Number* is **1**.
14. Click the Save  button to save the purchase update.
15. For budget purposes, enter the termination of the faculty purchase as a future-dated action:
- a) Click the **Work Location** tab, and click the Add  button on the Work Location page to add a new row for the termination.
 - b) In the *Effective Date* field, type or select the date when the appointment ends. This date must be either February 1 or July 1.
 - c) Type or select an *Action* of **Termination** and a *Reason* of **End of Appointment**.
 - d) Click the Save  button to save the termination action.
16. Complete the appropriate related procedures, below.

Related Procedures:

- Add the employee’s faculty title for the duration of the purchase, as described in “Updating Administrative Posts” on page 69.
- If needed, update education data and area of study (required for faculty), as described in “Updating Education” on page 87.

Job Data and Salary Updates

5

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DOF Job and Salary Changes

This section describes how to update the job record for a Dean of Faculty (DOF) faculty member or academic professional, when there is a change in the employee's job or salary status. These changes include promotions, transfers, job reclassifications, and off-cycle salary changes. You may also need to update the earnings distribution for various faculty members and academic professionals.



Note: If you are making adjustments to salary or duty time for a DOF secondary appointment, see “DOF Secondary Appointments (Faculty Purchase)” on page 101.

Recommendations and Approvals

For promotions, transfers, and reappointments, this section also describes how to track the status of the DOF recommendation and approval process. For detailed steps on tracking recommendations, see:

- “Tracking the DOF Appointment Recommendation” on page 127

Job and Salary Changes

For detailed information on the types of job and salary changes, and the procedures you will use to update the job data record, see:

- “Entering Promotions, Transfers, or Reclassifications” on page 133
- “Entering Off-Cycle DOF Salary Changes” on page 141
- “Updating Job Earnings Distribution” on page 147

Tracking the DOF Appointment Recommendation

When a personnel action is recommended for a faculty member or DOF academic professional, the department prepares the required paperwork, and forwards the recommendation form to the Office of the Dean of the Faculty for approval.

Use the procedures in this section to track the recommendation and approval of the following personnel actions:

- Promotions, staff transfers, and reappointments
- Non-promotion (when an assistant professor is not recommended for promotion or tenure)
- Off-cycle changes in duty time, start date, end date, rank, or salary
- Mid-appointment changes in salary or duty time for a DOF secondary appointment (faculty purchase)
- Revisions to the original appointment.



Important! When processing job and salary updates, the person must have an active Job record. Otherwise, you should process the action as a Hire or Rehire (see Chapter Hiring).

What changes are not tracked on the Recommendation pages?

Recommendations and approvals for the following job actions are ***not*** tracked in PeopleSoft:

- Leave requests (including sabbatical leaves)
- Terminations (including retirement or death)
- Annual July 1st salary increases

Do not complete the Recommendation pages for these actions.

Overview of the Tracking Process

Tracking appointment recommendations and approvals involves these steps:

1. Adding a Recommendation Pending Approval

When a department submits an Appointment Recommendation web form (and the attachments) to the Office of the Dean of the Faculty, you will log the recommendation on the Recommendation page. (See “Logging the DOF Appointment Recommendation” on page 129.)

2. Updating the Recommendation After Approval

After the approval process has been completed, you will update the Recommendation page with the final approval status (see “Updating the Recommendation Status After Approval” on page 131).


Logging the DOF Appointment Recommendation

Follow these steps to log the recommendation for a Dean of Faculty (DOF) personnel action on the Recommendation Status page group. Enter the date the recommendation was received on the Approval Status page, and the information about the recommended action on the Appointment Information page.



To log the DOF recommendation:

1. Select **Workforce Administration > Job Information > Princeton Data > Recommendation Status**.
2. On the Find page:
 - a) Type the *EmplID*, or type an appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. The Approval Status page of the Recommendation Status page group is displayed.
4. If necessary, click the Add button to insert a new row for this appointment recommendation. The Approval Status page is redisplayed with the current date in the *Date Received* field, and all other fields blank.
5. If the appointment recommendation form was not received on the current date, type or select the date when it was received in the *Date Received* field.
6. In the *Business Unit* field, type **PUDOF**.
7. In the *Department* field, type the home department number of the person being recommended.
8. Click the **Appointment Info** tab. On the Appointment Information page:
 - a) In the *Action Rec* field, select the recommended action using the Lookup button.
 - b) In the *Appt Start Date* field, type or select the date when the recommended appointment will begin.

- c) If the recommended appointment has an end date, type or select the end date in the *Appt End Date* field.
- d) In the *Job Code* field, type the recommended job code, or the current job code of the faculty or staff member, or click the Lookup  button to look up and select the code. You should enter a value here, even if the job code isn't changing.
- e) In the *FTE Salary* field, type the recommended FTE salary of the faculty or staff member.
- f) In the *Duty Time* field, type the recommended duty time, or leave the field blank if the duty time is unknown.
- g) In the *Number of Pays* field, type the recommended number of pays.
- h) As needed, you can enter comments about the recommendation, or track changes to the initial recommendation, in the *Notes* field.



Tip! *The Notes field is used when the initial appointment is not approved “as is” and requires modification.*

9. Click the Save  button to log the recommendation.

Updating the Recommendation Status After Approval

Follow these steps to update the Recommendation Status page when the Office of the Dean of Faculty (DOF) receives formal approval of a department appointment recommendation.



To enter a decision on the recommendation:

1. Select **Workforce Administration > Job Information > Princeton Data > Recommendation Status**.
2. On the Find page:
 - a) Type the *EmplID*, or type an appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. The Approval Status page of the Recommendation Status page group is displayed.
4. If there are multiple rows in the recommendation, select the row relating to this recommendation using the arrows in the header navigation controls .



Tip! To display information that will help you determine which is the correct recommendation, click the **Recommendation Info** tab.

5. In the *Decision* field, select the decision:

Appr Modif	The decision has been approved, but with modifications to the original recommendation
Approved	The decision has been approved as recommended
Not Apprvd	The decision has not been approved





Tip! This field provides important information to the academic departments and the Visa Office.

6. In the *Decision Date* field, type the date when the decision was made in *mm/dd/yyyy* format, or click the Calendar button to select the date from a calendar page.

7. In the *Decision By* field, type the initials of the person making the decision, or the abbreviation of the committee name.



Important! If you are not authorized to process job updates, see your system manager before updating the *Final Action* and *Action Date* fields.

8. If the employee has been transferred or promoted to an appointment with the rank of professor, associate professor, or assistant professor, make sure an acceptance letter has been received before you continue.
 - If the DOF office has ***not received*** an acceptance letter, save your entries to this point and complete the *Final Action* and *Final Date* fields when the letter is received. Otherwise, continue with the next step to finalize the recommendation status.
9. In the *Final Action* field:
 - If the action has been approved and, if required, an acceptance letter has been received, select **Processed**.
 - If the action has not been approved, the request has been cancelled, or the person has declined an appointment, select **Closed**. Selecting **Closed** automatically updates the Affiliations page.
10. For *Action Date*, specify the processing date (normally the current date) in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
11. Click the Save  button to save the decision data.

Entering Promotions, Transfers, or Reclassifications

Follow the steps in this section to enter job and salary changes that result from the promotion or transfer of a Dean of Faculty (DOF) employee, or from the employee's job reclassification.

Promotions and transfers occur when a current faculty member or academic professional changes jobs, changes departments, is reappointed, or moves between regular and visiting ranks. Job and salary information can also change as a result of a job reclassification or, occasionally, a demotion.

Will this action change the employee's pay status?

If the job action involves a change in the employee's pay status (paid to unpaid, or unpaid to paid), you must specify the status change on top of the job action (in a separate row with the same effective date). See "Changing the Employee's Pay Status (Pay or NoPay)" on page 155.

Before you start this procedure, make sure you have...

- Updated the Recommendation Status page for this appointment with a final action of **Processed** (see "Tracking the DOF Appointment Recommendation" on page 127)





To process a promotion or transfer for a DOF employee:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type full or partial search criteria in any of the search criteria fields.
 - b) Click the Search button. If multiple records are returned, select the desired employee record from the resulting search results by clicking on any link in the row.



Important! If the faculty member or academic professional has multiple employee records, be sure you select the appropriate record (0 or 1) from the search results.

3. On the Work Location page, click the Add button to insert a new row into the record.

4. In the *Effective Date* field, type the date when the job change is effective in *mm/dd/yyyy* format, or click the Calendar  button to select the effective date.
5. If a job row already exists with the same effective date, type the next sequential number in the *Sequence* field.
6. In the *Action* field, click the down  arrow and select the appropriate action, such as **Promotion**. In the *Reason* field, select the appropriate code as follows:


If the DOF employee is	Use Action/Reason
Moving to a higher job rank within the same staff/job function group <i>Tip! The person's staff/job function code remains the same, but the job code changes to a higher rank.</i>	Promotion/Promotion
Being reappointed to a term appointment (normally when the appointment end date is reached) in the same job rank, either with a new end date, or open-ended	Transfer/ Reappointment
Moving from one staff/job function category to a different staff/job function category . <i>Tip! The first letter of the staff/job function code changes, as in RR to FR.</i>	Transfer/Staff Transfer
Moving laterally from one department to another, without a change in job rank	Transfer/Dept Transfer
Moving between regular and visiting ranks within the same staff category, or is moving to a lower rank within the same staff category (not a demotion) <i>Tip! Only the second letter of the staff/job function code changes, as in FV to FR.</i>	Transfer/DOF Reclassification
Moving to a lower rank for disciplinary reasons (rarely used)	Demotion/Drop in Grade or Rank

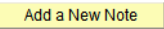

7. If a comment or note is needed, enter it on the Job Data Notepad:




Note: The Job Data Notepad allows you to enter information not included in any other field, such as

- Notes regarding a Howard Hughes Medical Institute (HHMI) affiliation
- Notes regarding a Princeton-Rutgers exchange
- Notes specifying that Payroll is to pay a home institution rather than the individual.
- Notes indicating that the person is working for Princeton out-of-state or out-of-country.

a) On the Work Location page, click the Maintain/View Notes  icon.

- b) On the Job Data Notepad, verify that the *Eff Date* is the date of the hire or relevant job action, and correct it if it is not.
- c) Click the Add a New Note  button.
- d) In the *Subject*, type a brief, succinct indication of what the comment is, for example, **Institutional Payment, HHMI, Princeton-Rutgers Exchange, or Other**.
- e) In the *Note Text* field, type the full note text, up to 100 characters, such as **Pay salary directly to Smithsonian Institution**.
- f) Click the Save  button to save the note, and then click the [Job Data Page](#) link to return to the Job Data page group.

8. Make sure the value in the *Business Unit* field is **PUDOF**.

9. If the change is to a term appointment, type the *Expected Job End Date* in *mm/dd/yyyy* format, or click the Calendar  button to select the estimated end date. If the appointment is changing to an open-ended appointment, blank out the value in this field.






Tip! The estimated appointment end date is the day after the last expected day of work. For example, if the employee's last day is expected to be 6/30/2009, the estimated appointment end date would be 7/1/2009.

10. If the employee is a tenured faculty member, make sure the *Tenure Flag* is selected ()



Note: You cannot select () the *Tenure Flag* when an *Expected Job End Date* has been entered. However, both the *Expected Job End Date* and the *Tenure Flag* may be blank, when appropriate.


11. If the department number is changing, specify the following:
 - a) Type the new department number in the *Department* field.
 - b) If the *Mail Drop* is not the default for the new department, click *Lookup*  to look up and select the appropriate value in the *Mail Drop* field.
12. Click the **Job Information** tab. On the Job Information page, enter information about the new job:
 - a) If the *Job Code* has changed, click *Lookup*  to look up and select the new *Job Code*.

When you change the *Job Code*, the system displays a warning message that a change to the *Job Code* field may affect the numbers on the FTE Compensation page. Click the OK  button twice (once to close the warning message window, and again to close the next window) to return to the Job Information page.

- b) If the benefits eligibility has changed, select the appropriate value in the *Reg/Temp* field. For a complete chart of benefits eligibility, see “Determining Benefits Eligibility” on page 280.
- c) If the faculty or staff member is changing from full-time to part-time, or part-time to full-time, select the new value in the *Full/Part* field.



Note: DOF staff who work 100% duty time are full-time; all other DOF staff are part-time.

13. If the person is on a non-paid appointment, click the **Payroll** tab, and change the *Pay Group* to **NCX** (No Pay). When the warning message is displayed, click the OK  button to return to the Payroll page.



Note: You may still add dollars in the *FTE Salary* field on the FTE Compensation page, for budgeting purposes. For example, for HHMI appointments and institutional payment agreements.

14. Click the **FTE Compensation** tab and specify the following:
- a) In the *FTE Salary* field, type the faculty or staff member's new base salary.



Tip! For a part-time employee, type what the individual would earn at their base rate if they worked full time.

- b) If the number of actual pay periods has changed (for example, when a faculty member or academic professional changes from a 10 month to a 12 month employee), type the new number in the *Actual Pay Periods* field.



Important! The number of actual pay periods per year cannot exceed the number of base periods (10 for faculty, 2 for summer-only faculty, and 12 for all other monthly staff) per year.

- c) If the duty time has changed, type the percentage of the full-time work week that the employee will work (for example, **50** for a half-time employee) in the *Duty Time* field.
- d) Some non-faculty staff members work on a regular non-12-month basis (for example, they do not work in the month of July every year). In these cases, specify the month the pay stops in the *Stop pay beginning on 1st day of pay period field* and the month pay resumes in the *Restart pay on 1st day of pay period*.



Important! This may only be specified for summer months--June, July, or August, or a combination thereof.



Note: For Faculty, **7** will default in the *Stop pay beginning on 1st day of pay period field* and **9** will default in the *Restart pay on 1st day of pay period field*. These fields cannot be changed.

15. If a Postdoctoral Research Fellow or Visiting Fellow is receiving a check for a stipend only, the pay group and earnings code default to the correct values.

If the Postdoctoral Research Fellow or Visiting Fellow is switching to no pay, and will not be receiving a check from Princeton, click the [Earnings Distribution](#) link, and select **None** in the *Earnings Distribution Type* field to remove the earnings distribution. When the warning message is displayed, click the OK button and continue.






Tip! You should have entered NCX as the Pay Group on the Payroll page in Step 13.

If compensation for a Postdoctoral Research Fellow or Visiting Fellow includes a wage supplement (split between stipend and wage supplement, or wage supplement only), click the [Earnings Distribution](#) link, and select **By Amount** in the *Earnings Distribution Type* field. Specify the compensation amounts for each earnings code that applies:

- If the total compensation is a wage supplement only, type **171** in the *Earn Code* field, and the total compensation payment (monthly amount) in the *Compensation Rate* field.
- If the total compensation is a combination of stipend and wage supplement, perform the following:
 - If Princeton is paying a stipend, type **170** in the *Earn Code* field Under *Job Earnings Distribution*, and the monthly stipend amount in the *Compensation Rate* field.
 - If the fellow is receiving a stipend not paid by Princeton, type **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.



Note: On rare occasions, the stipend may be split between both 170 and 058 earnings, in which case you need to add a second row to split the earnings types. Click the Add  button to insert a new row before typing **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.

- All Postdoctoral Research Fellows receive a salary supplement in lieu of retirement contributions. To add this payment, click the Add  button to insert a new row. In the new row, type **172** in the *Earn Code* field, and the monthly amount of the wage supplement specifically designated for retirement (normally 10% of the stipend amount as designated in the 170/058 earnings) in the *Compensation Rate* field.
- If a Postdoctoral Research Fellow receives an additional wage supplement beyond the stipend or retirement supplement, click the Add  button to insert a new row. In the new row, type **171** in the *Earn Code* field, and the amount of the wage supplement in the *Compensation Rate* field.




Important! *The amounts allocated to stipend and wage supplement must equal the monthly Compensation Rate displayed at the top of the page, or the page cannot be saved.*

16. You may also need to add titles (in addition to the job default) to the Administrative Posts page (see “Updating Administrative Posts” on page 69).
17. If the person is switching into or out of an affiliation with the Howard Hughes Medical Institute (HHMI), click the [Benefits Program Participation](#) link.
 - If the person is joining HHMI, type **HHMI** in the *Elig Fld 4* field.
 - If the person is leaving HHMI and returning to employee status, blank out **HHMI** in the *Elig Fld 4* field.



Important! *Be sure to add a Job Note, as described in Step 7, on page 135.*

18. Click the Save  button to save your changes.
19. Complete the appropriate related procedures, below.

Related Procedures:

- If the faculty member or academic professional is changing from **Pay to NoPay**, or **NoPay to Pay** status, you must specify an additional data change action. See “Changing the Employee’s Pay Status (Pay or NoPay)” on page 155.

- If you are processing a job action for:
 - A non-faculty member who has been given a moving allowance
 - A Postdoctoral Research Fellow or Visiting Fellow with an institutional allowance

you must specify the allowance allocated. See “Updating DOF Allowances” on page 76.

- If the educational level of the faculty member or academic professional has changed, you must update the Education page. See “Updating Education” on page 87.
- If the faculty member or academic professional has a special title that has changed, you must update the title. See “Updating Administrative Posts” on page 69.

Entering Off-Cycle DOF Salary Changes

Follow these steps to enter off-cycle (non-annual) job and salary changes for a Dean of Faculty (DOF) employee. These changes include pay rate adjustments, periodic increases, and changes in duty time or number of pays.

Off-cycle salary changes are initiated when:

- The staff member’s department submits a form to the Office of the Dean of the Faculty.
- The Dean of the Faculty approves an off-cycle increase, either across-the-board or on an individual basis.

Will this action change the employee’s pay status?

If the job action involves a change in the employee’s pay status (paid to unpaid, or unpaid to paid), you must specify the status change on top of the job action (in a separate row with the same effective date). See “Changing the Employee’s Pay Status (Pay or NoPay)” on page 155.

Before you start this procedure, make sure you have...

- *Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Updating the Recommendation Status After Approval” on page 131)*





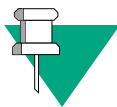
To process an off-cycle salary change:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type full or partial search criteria in any of the search criteria fields.
 - b) Click the Search button. If multiple records are returned, select the desired employee record from the resulting search results by clicking on any link in the row.



Important! *If the faculty member or academic professional has multiple employee records, be sure you select the appropriate record (0 or 1) from the search results.*

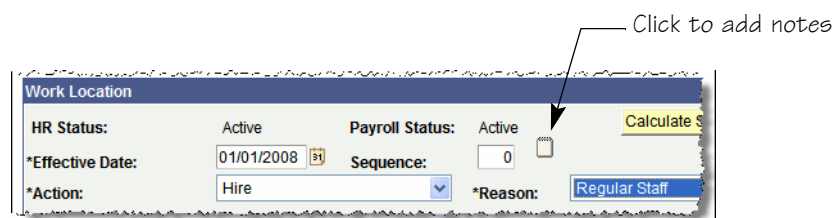
3. On the Work Location page, click the Add  button to insert a new row into the record.
4. In the *Effective Date* field, type the date when the salary change is effective in *mm/dd/yyyy* format, or click the Calendar  button to select the effective date.
5. If a Job row already exists with the same effective date, type the next sequential number in the *Effective Sequence* field.
6. If a comment or note is needed, enter it on the Job Data Notepad:

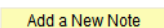



Note: The Job Data Notepad allows you to enter information not included in any other field, such as

- Notes regarding a Howard Hughes Medical Institute (HHMI) affiliation
- Notes regarding a Princeton-Rutgers exchange
- Notes specifying that Payroll is to pay a home institution rather than the individual.
- Notes indicating that the person is working for Princeton out-of-state or out-of-country.

- a) On the Work Location page, click the Maintain/View Notes  icon.

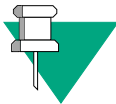


- b) On the Job Data Notepad, verify that the *Eff Date* is the date of the hire or relevant job action, and correct it if it is not.
- c) Click the Add a New Note  button.
- d) In the *Subject*, type a brief, succinct indication of what the comment is, for example, **Institutional Payment**.
- e) In the *Note Text* field, type the full note text, up to 100 characters, such as **Pay salary directly to Smithsonian Institution**.
- f) Click the Save  button to save the note, and then click the [Job Data Page](#) link to return to the Job Data page group.

7. In the *Action* field, select **Pay Rate Change**.
8. In the *Reason* field, select the reason for the salary increase.

For	Use Reason Code
An increase or decrease in salary when a reclassification is not warranted	Adjustment
A yearly salary increase, normally July 1st.	Annual Increase
A change in duty time or number of pays	Change Duty Time/ Number Pays
An off-cycle (non-annual) salary increase	Periodic Increase
An adjustment in pay to compensate for a secondary appointment when the base salary is lower than would normally be paid for teaching	Secondary Appt
A change in the wage supplement for a postdoctoral research fellow or visiting fellow	Change in PDRF/VF Wage Supplmt

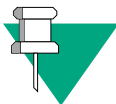
9. If the person is changing from full-time to part-time, or part-time to full-time, click the **Job Information** tab and update the *Full/Part* field.



Note: DOF staff who work 100% duty time are full-time; all other DOF staff are part-time.

If a person’s duty time is changing concurrently with a salary change, check the person’s benefits eligibility. If the benefits eligibility is changing, update *Regular/Temporary* field, as appropriate.

10. If the person is on a non-paid appointment, click the **Payroll** tab, and change the *Pay Group* to **NCX** (No Pay). When the warning message is displayed, click the OK button to return to the Payroll page.



Note: You may still add dollars in the *FTE Salary* field on the FTE Compensation page, for budgeting purposes.

11. Click the **FTE Compensation** tab and specify the following:
 - a) In the *FTE Salary* field, type the new base salary, if appropriate.



Tip! For a part-time employee, type what the individual would earn at their base rate if they worked full time.

- b) If the number of actual pay periods has changed (for example, when a staff member changes from a 10 month to a 12 month employee), type the new number in the *Actual Pay Periods* field.

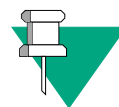


Important! The number of actual pay periods per year cannot exceed the number of base periods (10 for faculty, 2 for summer-only faculty, and 12 for all other monthly staff) per year.

- c) If the duty time has changed, type the percentage of the full-time work week that the employee will work (for example, **50** for a half-time employee) in the *Duty Time* field.
- d) Some non-faculty staff members work on a regular non-12-month basis (for example, they do not work in the month of July every year). In these cases, type the month the pay stops in the *Stop pay beginning on 1st day of pay period* field and the month pay resumes in the *Restart pay on 1st day of pay period*.



Important! This may only be specified for summer months—June, July, or August, or a combination thereof.



Note: For Faculty, **7** will default in the *Stop pay beginning on 1st day of pay period* field and **9** will default in the *Restart pay on 1st day of pay period* field. These fields cannot be changed.

- 12. If a Postdoctoral Research Fellow or Visiting Fellow is receiving a check for a stipend only, the pay group and earnings code default to the correct values.

If the Postdoctoral Research Fellow or Visiting Fellow is switching to no pay, and will not be receiving a check from Princeton, click the [Earnings Distribution](#) link, and select **None** in the *Earnings Distribution Type* field to remove the earnings distribution. When the warning message is displayed, click the OK button and continue.



Tip! You should have entered **NCX** as the Pay Group on the Payroll page in Step 10.

If compensation for a Visiting Research Fellow or Visiting Fellow includes a wage supplement (split between stipend and wage supplement, or wage supplement only), click the [Earnings Distribution](#) link, and select **By Amount** in the *Earnings Distribution Type* field. Specify the compensation amounts for each earnings code that applies:

- If the total compensation is a wage supplement only, type **171** in the *Earn Code* field, and the total compensation payment (monthly amount) in the *Compensation Rate* field.
- If the total compensation is a combination of stipend and wage supplement, perform the following:
 - If Princeton is paying a stipend, type **170** in the *Earn Code* field Under *Job Earnings Distribution*, and the monthly stipend amount in the *Compensation Rate* field.
 - If the fellow is receiving a stipend not paid by Princeton, type **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.



Note: On rare occasions, the stipend may be split between both 170 and 058 earnings, in which case you need to add a second row to split the earnings types. Click the Add **+** button to insert a new row before typing **058** in the *Earn Code* field, and the amount of the stipend paid directly to the fellow by the sponsoring agency in the *Compensation Rate* field.

- All Postdoctoral Research Fellows receive a salary supplement in lieu of retirement contributions. To add this payment, click the Add **+** button to insert a new row. In the new row, type **172** in the *Earn Code* field, and the monthly amount of the wage supplement specifically designated for retirement (normally 10% of the stipend amount as designated in the 170/058 earnings) in the *Compensation Rate* field.
- If a Postdoctoral Research Fellow receives an additional wage supplement beyond the stipend or retirement supplement, click the Add **+** button to insert a new row. In the new row, type **171** in the *Earn Code* field, and the amount of the wage supplement in the *Compensation Rate* field.



Important! The amounts allocated to stipend and wage supplement must equal the monthly *Compensation Rate* displayed at the top of the page, or the page cannot be saved.

13. Click the Save  button.

Related Procedures:

- If the faculty member or academic professional is changing from **Pay** to **NoPay**, or **NoPay** to **Pay** status, you must specify an additional data change action. See “Changing the Employee’s Pay Status (Pay or NoPay)” on page 155.

Updating Job Earnings Distribution

Follow these steps to enter a change in job earnings distribution when:

- The stipend or wage supplement distribution for a Postdoctoral Research Fellow or Visiting Fellow changes, and this change is not concurrent with an appointment or reappointment action.
- The partial pay allocation for a faculty member on sabbatical leave changes, without a specific leave action, and the monthly compensation rate does not change.

Before you start this procedure, make sure you have...

- *Updated the Recommendation Status page for this appointment with a final action of **Processed** (see “Updating the Recommendation Status After Approval” on page 131).*



To update a job earnings distribution:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type full or partial search criteria in any of the search criteria fields.
 - b) Click the Search button. If multiple records are returned, select the desired employee record from the resulting search results by clicking on any link in the row.





Important! *If the faculty member or academic professional has multiple employee records, be sure you select the appropriate record (0 or 1) from the search results.*

3. On the Work Location page, click the Add button to insert a new row into the record.
4. Type the *Effective Date* of the change in *mm/dd/yyyy* format, or click the Calendar button to select the effective date.
5. In the *Action* field, select **Earnings Distribution Change**.
6. For *Reason*, select **Change in Earnings**.

7. Click the [Earnings Distribution](#) link to display the Earnings Distribution page.

8. In the *Earnings Distribution Type* field, select **By Amount**.

If the stipend/supplement is changing to \$0 (a change from Pay to No Pay), select **None**. When the warning message is displayed, click the OK  button. Also be sure the *Pay Group* is changed to **NCX** on the Payroll tab.

9. In the *Earn Code* field, type the code or click the Lookup  button to look up and select the code. For Postdoctoral Research Fellows and Visiting Fellows, use

170	Stipend
171	Wage Supplement
172	Wage Supplement - Retirement Top Up


For faculty and staff on half or partial pay leaves, use


001	Regular Earnings
058	Non-paid earnings without pension contributions

10. Type the amount allocated to each earnings code in the *Compensation Rate* field.



Important! *The total of the Compensation Rate fields must equal the monthly Compensation Rate displayed above the Earnings Distribution Type field, or the page cannot be saved.*

11. If necessary, click the Add  button to insert a new row into the record, and repeat Step 9 and Step 10.

12. Click the Save  button to save the distribution changes.

Miscellaneous Data Changes

The procedures in this section describe how to update or correct miscellaneous data on the Job Data pages in Workforce Administration. Use these procedures when the change you are making to the employee's job record is not part of a specific job action (such as a promotion or transfer):

- “Changing the Expected Job End Date” on page 150
- “Changing the Summer Stop and Start Pay Months” on page 151 (to change the summer stop-pay and/or start-pay month for an employee who works a non-standard schedule)
- “Changing the Campus Mail Address (Mail Drop)” on page 153
- “Changing the Employee’s Pay Status (Pay or NoPay)” on page 155 (to change the employee’s pay status from Pay to NoPay or NoPay to Pay)
- “Changing the Employee’s Pay Group” on page 156.

Temporary Changes Not Using Correction Mode

If you do not have access to correction mode, you can temporarily change the employee's department, job code, or salary. See:




- “Temporarily Changing Dept, Job Code, or Salary Data” on page 157.

Changing the Expected Job End Date

Follow these steps to change an employee's expected job end date, when the date is not being changed in connection with a specific job action such as a transfer.





To change an employee's estimated appointment end date:


1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type the appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page, click the Add  button to insert a new row.
4. Type the *Effective Date* of the change in *mm/dd/yyyy* format (defaults to current date) or click the Calendar  button to select the date.



Note: For DOF employees, the effective date is usually the date when the employee is formally notified of the change (for example, the date of a letter). For professorial faculty, use the date of the Academic Affairs report.

5. If the effective date of the change is the same date as the previous row, type the next sequential number in the *Effective Seq* field.
6. For *Action*, click the down  arrow and select **Data Change**.
7. For *Reason*, select **Change in Appt End Date**.
8. In the *Expected Job End Date* field, either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.

Tip! Remember, the expected job end date is always the day after the status change (12/31/09 would be 1/1/10).

9. Click the Save  button to save your changes.

Changing the Summer Stop and Start Pay Months

Follow these steps to change the stop and start pay months to different *summer* months for an employee on a non-standard, partial-year schedule.

What is a non-standard schedule?

Some monthly non-faculty employees work less than 12 months on a non-standard schedule. For example, an employee who works 9 months is usually not paid in June, July, and August of a given year. An employee who works 10 months is usually not paid in July and August, and an employee who works 11 months is usually not paid in August.


Do you need to stop pay during non-summer months?

If you need to stop pay for a partial-year employee during non-summer months, you must process the action as a leave of absence. See “Leaves and Terminations” on page 169.



To change an employee’s start and stop pay months:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type the appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page, click the Add button to insert a new row.
4. Type the *Effective Date* of the change in *mm/dd/yyyy* format (defaults to current date) or click the Calendar button to select the date from a calendar page.
5. If the effective date of the change is the same date as the previous row, type the next sequential number in the *Effective Seq* field.
6. For *Action*, click the down arrow and select **Data Change**.
7. For *Reason*, select **Chg Stop/Start Pay Months**.
8. Click the **FTE Compensation** tab. On the FTE Compensation page:

- a) In the *Stop pay beginning on 1st day of pay period* field, specify the number of the first month the employee will be out:
 - **6** to stop pay beginning June 1
 - **7** to stop pay beginning July 1
 - **8** to stop pay beginning August 1
 - b) In the *Restart pay on 1st day of pay period* field, specify the number of the month the employee will return to work:
 - **7** to restart pay beginning July 1
 - **8** to restart pay beginning August 1
 - **9** to restart pay beginning September 1
9. Click the Save  button to save your changes.

Changing the Campus Mail Address (Mail Drop)

The employee's campus mailing address, or *mail drop*, is the address used for campus mail and paycheck distribution. This address is automatically generated by a mail drop code specified in the Job Data component.



Note: When a person terminates (termination, retirement, deceased, etc.), the mail drop changes automatically to **998** for undergraduates, and **999** for everyone else. This was done at the request of the Payroll Office, so that checks and W-2 forms will be sent to the Payroll Office, and won't be lost after a person leaves.

Follow these steps to change an employee's campus mail address and check distribution destination in the Job Data component.

Where can you view campus address details?

You can view campus address details (such as department name and building location) on the **Campus Mail Address** row of the Contact Information page in the Modify a Person component [see "Updating Non-Campus Addresses and Contact Information" on page 222]. However, you cannot update a campus address on the Contact Information page. To update the address, you must change the mail drop code in Job Data.

Are there multiple mail drop locations for the department?

Some Princeton University departments have multiple locations. In this case, there may be multiple mail drop location codes in addition to the primary department number. For example, the department number for the Firestone Library is **690**. However, the mail drop location code for the Seeley Mudd Manuscript Library on Olden Street is **6907**.


Has the physical location of the mail drop changed?

If you need to change the physical location of a department mail drop (for example, a department has moved to a new location in another building) see your system manager.







To change a campus mail address (mail drop):

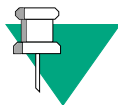
1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:

- a) Type the *EmplID*, or type the appropriate search value in one or more of the other search criteria fields.
- b) Click the Search  button. If multiple records are returned, click the employee's **0** record.



Note: Only the employee's **0** record is used for check and campus mail distribution.

3. On the Work Location page:
 - a) Click the Add  button to insert a new row.
 - b) Type the *Effective Date* of the change in *mm/dd/yyyy* format (defaults to current date) or click the Calendar  button to select the date from a calendar page.
 - c) For *Action*, click the down  arrow and select **Data Change**.
 - d) For *Reason*, select **Mail Drop Change**.
 - e) In the *Princeton Mail Drop ID* field, type the mail drop location code, or click the Lookup  button to select the code.



Note: Make sure the *Princeton Mail Drop ID* code/description specifies the actual location where the employee will receive pay checks and campus mail. Some departments may have multiple mail drop locations (see the introduction to this procedure).

4. Click the Save  button.

Changing the Employee's Pay Status (Pay or NoPay)






Follow these steps when an active employee moves from non-paid status to paid status, or from paid status to non-paid status. To specify the new pay status, you will add a **Data Change** row on top of the related job action row. Specifying a change to paid status will trigger I-9 and benefits processing for the employee. A change to unpaid status will trigger benefits billing.



Note: Do not use this procedure if there has been a break in service and the employee is being rehired with a different pay status.



To process a change from nopay to pay or pay to nopay:







1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type the appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page, click the Add  button to insert a new row on top of the row that specifies the job action (for example, a **Transfer**) that is associated with the change in pay status.
4. Make sure the *Effective Date* is the same as the effective date of the job action that causes the pay status change. As needed, type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
5. Type the next sequential number in the *Effective Seq* field.
6. For *Action*, click the down  arrow and select **Data Change**.
7. For *Reason*:
 - To process a change from non-paid to paid status, select **NoPay to Pay**:
 - To process a change from paid to non-paid status, select **Pay to NoPay**:
8. Click the Save  button to save your changes.

Changing the Employee's Pay Group

Follow these steps to change an employee's pay group in Job Data, when the change is not part of a related job action such as a transfer.



To change an employee's pay group:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type the appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page, click the Add  button to insert a new row.
4. Type the *Effective Date* of the change in *mm/dd/yyyy* format (defaults to current date) or click the Calendar  button to select the date from a calendar page.
5. If the effective date of the change is the same date as the previous row, type the next sequential number in the *Effective Seq* field.
6. For *Action*, click the down  arrow and select **Data Change**.
7. For *Reason*, select **Pay Group Change**:
8. Click the **Payroll** tab. On the Payroll page, specify the new *Pay Group* code in the *Payroll for North America* area. Either type the new code, or click the Lookup  button to look up and select the code.
9. Click the Save  button to save your changes.

Related Procedure:






- If the employee's pay status has also changed, see "Changing the Employee's Pay Status (Pay or NoPay)" on page 155.

Temporarily Changing Dept, Job Code, or Salary Data

If you do not have permission to use correction mode, follow these steps to make temporary changes to the employee's department, job code, or salary information in Job Data.



To temporarily change department, job code, or salary data:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type the appropriate search value in one or more of the other search criteria fields.
 - b) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page, click the Add  button to insert a new row.
4. Type the *Effective Date* of the change in *mm/dd/yyyy* format (defaults to current date) or click the Calendar  button to select the date from a calendar page.
5. In the likely event that the effective date of the change is the same date as the previous row, type the next sequential number in the *Effective Seq* field.
6. For *Action*, click the down  arrow and select **Data Change**.
7. For *Reason*, select the appropriate code:
 - **Correction-Department** to temporarily change the employee's department.
 - **Correction-Job Code** to temporarily change the employee's job code.
 - **Correction-Pay Rate** to temporarily change the employee's salary information on the FTE Compensation page.
8. Depending on the reason code you selected, update the *Department* field on the Work Location page, *Job Code* on the Job Information page, or the appropriate salary field(s) on the FTE Compensation page.
9. Click the Save  button to save your changes.
- 10. Notify your system manager of the changes.**

Additional Pay

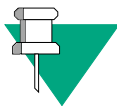
This section describes how to process additional pay that is not part of an employee's regular FTE salary.

About Additional Pay

Additional pay includes:

- Special payments (such as accrued vacation pay, additional work, or chair/director overrides) for employees.

The additional pay information can be submitted to our office on an Additional Pay form, a Termination form (indicating vacation hours to be paid), or other document (such as a spreadsheet that tracks work on reunions).



Note: Summer Salaries for faculty are displayed on the Additional Pay page. However, they are loaded from the Labor Accounting system on a monthly basis, and are not manually entered except in very unusual cases.

Is the additional pay for a period when the employee was NOT paid?

Process additional pay for an employee only if the person has a paid active/on leave record for the time the additional pay work was completed. If the Additional Pay form indicates that the pay is related to a time period when the employee was *not paid* (active or on leave), the additional pay cannot be processed. In this case, the department must work with the Office of the Dean of the Faculty to hire the person for the dates worked.

Are the additional earnings committed or uncommitted?

If the additional pay represents *uncommitted* earnings, you will need to specify the account number to which the earnings will be charged (see Step 18, on page 163). For *committed* earnings, you do not need an account number (these earnings are handled separately in the Labor Accounting system). However, you must always specify a goal amount for committed earnings (see Step 12, on page 163).

The following table lists committed and uncommitted earnings types you may see, and the associated earnings codes:

Earnings Type	Description	Earnings Code
Committed (regular earnings; no account number required)	Accrued vacation hours	004
	Chair's/dean's overrides	031
	Master's stipends	032
Committed, but not entered here by DOF	Faculty summer salaries (comes from Labor Accounting; never entered here)	002
	Worker's Compensation	040
	Temporary Disability	041
Uncommitted (account number required on the Additional Pay 2 page)	Special payments, such as a bonus	003
	Severance	007
	Wages in lieu of pension contribution	008
	Faculty voluntary retirement incentive payments	030
	Other allowance	034
Uncommitted, but not entered here by DOF	Base salary - lump sum retro	006
	Staff education reimbursements	009, 038
	Short term professional wages	013
	Housing allowances	033, 039
	Empl Child Care Assistance Pgm	050
	Student Child Care Assistance Pgm	111

Processing Additional Pay

Follow these steps to process additional pay that is not part of a monthly employee's regular FTE salary (such as accrued vacation pay, bonus, or chair override).



To process additional pay for an employee:

1. Select **Payroll for North America > Employee Pay Data USA > Create Additional Pay**.
2. On the Find page:
 - a) Type full or partial search criteria in any of the search criteria fields.



***Tip!** You can select an Empl Rec Nbr of **0** (if applicable) to speed up the search.*

- b) Select **Include History**.
- c) Click the Search button. If multiple records are returned, select the appropriate employee record by clicking on any link in the row.






***Important!** If the employee has both **0** and **1** records, be sure to select a record from which earnings can be paid. For example, do not select record **1** for a DOF faculty purchase, because a faculty purchase is assigned to the **NCX** (No Pay) pay group.*

3. The Additional Pay page is displayed.



***Important!** Before continuing, click on the Job Information header to open that area, and check the current status of the employee. Make sure the employee is active, in the appropriate business unit, and is not NoPay (**NCX** Pay Group).*

4. If the *Earnings Code* field is **blank** (the employee has never received an additional payment), continue with Step 6.
5. If the *Earnings Code* field is **not blank**:
 - a) Check to see if the employee has received additional payments for more than one earnings code (the right arrow in the *Earnings* header bar will be highlighted ). Click the right arrow to view the earnings codes.
 - b) If the earnings code for this additional payment does not exist:
 - Click the Add  button beneath the *Additional Pay* header bar (in line with the *Earnings Code* field).
 - Continue with Step 6.
 - c) If the earnings code for this additional payment *already exists*:
 - Make sure the earnings code is displayed in the *Additional Pay* area.
 - Click the Add  button beneath the *Effective Date* header bar (in line with *Effective Date*).
 - Continue with Step 7.
6. In the *Earnings Code* field, type one of the following values:

003	Special Payroll Invoice
004	Accrued Vacation Hours
007	Severance
008	Wage Lieu Pensn Contrib (EE's) (wage in lieu of pension contribution for active employees)
010	Wage Lieu of Pensn Contrib (LTD) (wage in lieu of pension contribution for employees on Long Term Disability)
030	Faculty Voluntary Retirement Incentive Payment
031	Chair/Dean Override (must be paid in equal amounts over one or two semesters)
032	Master's Stipend
034	Other Allowance
002	Faculty Summer Salary (rarely updated manually—normally this is loaded from Labor Accounting)

7. In the *Effective Date* field, specify the begin date of the monthly pay period when the first additional payment is to be made.



Important! Do not enter dates for a previous pay period. After a payroll period is closed, you cannot make a retroactive payment from the Additional Pay pages. You must use the next open pay period.

8. Always specify a value in the *Addl Seq #* field:
 - If this additional payment does *not* require an account code, or if the payment is to be charged to a *single* account code, type **1**.
 - If the additional payment is to be charged to *multiple* account codes, increment *Addl Seq #* by 1 for each additional account code.
9. In the *Pay End Date* field, specify the end date of the final monthly pay period in which the additional payment is to be made. For a lump sum payment, specify the end date of the pay period in which the payment will be made.



Tip! If you leave *End Date* blank, additional payments will continue on an ongoing basis until the *Goal Amount* (see Step 12) is met. If no *Goal Amount* is specified, the payments will continue indefinitely.

10. If the *Earnings Code* for this additional payment is **003** (special payment), click the down arrow and select the *Reason* for the payment.

DOF reason codes include:

- **Acad Stipd** (academic-related stipend)
- **Acad Work** (academic-related work, usually for the Princeton Writing Program)
- **Add'l Work** (additional work for a regular, exempt staff member)
- **Bonus** (used for some faculty retirement agreements)
- **Job Oth Pay** (job other pay)
- **Misc** (miscellaneous additional pay)
- **Not Specif** (not specified)

11. In the *Earnings* field:
 - For vacation pay (*Earnings Code* **004**), leave this field blank.
 - For other earnings codes, type the amount of additional pay to be paid to the employee *per pay period*. For example, if \$1,000 is to be paid over the next five months, type **\$200**. If \$1,000 is to be paid in one lump sum, specify **\$1000**.

12. For *Goal Amount*, type the total amount of the additional pay. The *Goal Amount* is required if the additional pay is for committed earnings (*Earnings Code 002, 031, or 032*) and is recommended for other earnings codes.



Tip! When *Goal Amount* is specified, the total amount paid is restricted to the specified goal amount.

13. Leave *Goal Balance* blank. This field is updated automatically as payrolls are run and the earnings are paid.
14. If this is vacation pay (*Earnings Code 004*) type the number of *Hours* (not days) to be paid as vacation.



Note: The maximum number of vacation hours that can be paid is:


- 217.5 (7.25 x 30) for monthly employees
- no hours (0) for DOF faculty and visiting staff

15. For a bonus payment (*Earnings Code 003, Reason Bonus*) that requires a separate check:
- a) In the *Sep Chk #* field, type the number **1** for the first check. If not the first check, increment *Sep Chk #* by 1, to a maximum of **9**.
 - b) Select *Disable Direct Deposit*.



Note: Faculty are not typically paid in July and August. If a 10-month faculty member is to be paid bonus earnings (earnings code **003**) in July or August, you must type the number **1** in the *Sep Chk #* field or they will not be paid, even if they are receiving faculty summer salary (earnings code **002**).


16. For a faculty retirement-agreement payout (*Earnings Code 003, Reason Misc*) or faculty voluntary retirement incentive payment (*Earnings Code 030*) that requires a separate check:
- a) In the *Sep Chk #* field, type the number **1** for the first check. If not the first check, increment *Sep Chk #* by 1, to a maximum of **9**.
17. Select *OK to Pay*.
18. If the additional pay is for uncommitted earnings (*Earnings Code 003, 007, 008, 010, 030 or 034*), specify an account code on the ChartField Details page:

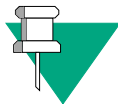
- a) Expand the Job Information section by clicking the  arrow on the Job Information header.
- a) Click the **Edit ChartFields** link in the Job Data Override section.
- b) In the *Combination Code* field, type the 7-digit project/grant number (without a hyphen) for the earnings, and click the OK button.

Tip! For Faculty Voluntary Retirement Incentive Payment (Earnings Code **030**), use the project/grant **4651001**.

- c) When returned to the Additional Pay page, you will see the project/grant displayed in the Combination Code field.


If you get a message that the project/grant is invalid (such as **Account chartfield should not be blank**), then:



- a) In the *Combination Code* field on the Chartfield Details page, type the first three characters of the project/grant (i.e., the department number), and click the Lookup  button.
- b) On the Look Up Combination Code page, select the link for the account code.



Note: If necessary, confirm with the submitting department that this is the correct number, instead of what was provided on the form.

- c) When you are returned to the ChartField Details page, click OK. The Combination Code will be displayed in the Job Data Override area.

Tip! To delete a Combination Code, click the Delete Combination Code  button next to the [Edit Chartfields](#) link in the Job Data Override section of the Additional Pay page. To change a Combination Code, repeat Step 18.



19. If the employee received a bonus in a previous pay period, and is receiving additional pay for another reason this month, you must reset defaults in the Tax Information area:
 - a) Expand the Tax Information area by clicking the  arrow on the Tax Information header.
 - b) For *Tax Method*, click the down  arrow and select **Annualized**.
 - c) For *Benefit Deductions Taken*, select **No Override**.

- d) For *General Deductions Taken*, select **No Override**.
20. For a bonus payment (*Earnings Code 003, Reason Bonus*):
- a) Click the arrow in the Tax Information header to open the area.
 - b) For *Tax Method*, select **Bonus**.
 - c) For the *Benefit Deductions Taken* and *General Deductions Taken* fields, click the down arrow and select **Subset**.
 - d) In the *Benefit Ded Subset ID* and *General Ded Subset ID* fields, type **BON**.
21. For a faculty retirement-agreement payout other than the Faculty Retirement Bonus program (for *Earnings Code 003, Reason Misc*):
- a) Click the arrow in the Tax Information header to open the area.
 - b) For *Tax Method*, select **Supplemntl**.
 - c) For the *Benefit Deductions Taken* and *General Deductions Taken* fields, click the down arrow and select **Subset**.
 - d) In the *Benefit Ded Subset ID* and *General Ded Subset ID* fields:
 - Type **SUM** if the payment will be made in July or August.
 - Type **BON** if the payment will be made in any other month.

Note: For this payment, you *must* select separate check in Step 16.

22. For a faculty voluntary retirement incentive payment (*Earnings Code 030*):
- a) Click the arrow in the Tax Information header to open the area.
 - b) In the *Tax Periods* field, enter the number of months pay the amount represents—**5** (half year), **10** (full year), or **15** (1 1/2 years).
 - c) For *Tax Method*, select **Supplemntl**.
 - d) For the *Benefit Deductions Taken* and *General Deductions Taken* fields, click the down arrow and select **None**.

Note: For this payment, you *must* select separate check in Step 16.

23. If you are entering a special, one-time summer payment (*Earnings Code 003*) that is *not* faculty summer salary (*Earnings Code 002*) on this page for payroll:
 - a) Click the arrow in the Tax Information header to open the area.
 - b) For the *Benefit Deductions Taken* and *General Deductions Taken* fields, click the down  arrow and select **Subset**.
 - c) In the *Benefit Ded Subset ID* and *General Ded Subset ID* fields, type **SUM**.
24. Click the Save  button.

Paying Accrued Vacation for Someone No Longer in the MCM Paygroup

If a researcher, specialist or librarian (MCM pay group) is transferring either to an MCP paygroup (paid a stipend) or to an NCX paygroup (Non-Paid) and they have any accrued vacation hours to pay, you must enter them into *Additional Pay* before you transfer them out of the MCM paygroup.

If you enter accrued vacation hours into *Additional Pay* for anyone in either the MCP or NCX paygroups, the following message will display:

Earnings Code 004, Effective Date 2007-xx-xx, is not found in the Earnings Program Table. (2000,647) The Earnings Code specified is either not valid or not yet active for this employee's Earnings Program.

If you have to pay accrued vacation hours after someone is no longer in MCM, contact Denice Marnien in Payroll, who can add the accrued vacation hours to their payline under MCM.

Leaves and Terminations

6

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About Leaves of Absence

Dean of Faculty (DOF) employees may go on one or more leaves of absence during their career at Princeton University. The leave may be with pay (full, partial, or half) or without pay, and may or may not be related to a disability. Faculty members are eligible to go on sabbatical leaves.

Examples of employee leaves include:

- Faculty sabbatical
- Personal
- Research or consulting
- Military
- Short-Term Disability (STD)
- Worker's Compensation
- Long-Term Disability (LTD)

A leave of absence changes a person's employee status and benefits status, and may start billing for continued benefits coverage.

How Leaves of Absence Are Processed

General leaves of absence, such as sabbatical, personal, research, consulting, or military leaves, are usually processed on the Job Data page group.

Short Term Disability (STD) and Worker's Compensation leaves are processed on separate page groups, where the changes initiate an overnight process that automatically updates the Job Data pages.

Graduate and undergraduate student leaves of absence are automatically updated through an interface from the student systems. They are rarely updated manually.

Earnings Distribution

Leaves that provide partial pay, and short-term disability and workers' compensation leaves, change the earnings code for the earnings distributions. Special earnings codes for leaves include

001	Regular earnings
041	Short-Term Disability
040	Worker's Compensation
057	No pay, but send University pension contributions to TIAA/CREF
058	No pay, and no pension contribution

For short-term disability and worker's compensation leaves, the earnings codes are updated automatically. For other leaves, the earnings must be distributed manually by monthly amount.

What if the employee is eligible for vacation pay?

If an employee is eligible for vacation when going on leave without pay, the vacation will be paid by hours rather than days. Vacation hours must be entered on the Additional Pay page immediately following the Leave of Absence update (see "Additional Pay" on page 158).

Returns from Leave

If the return date is known, you can process the return from leave at the same time as the leave. If the return date is not known for a DOF employee, the paperwork is put in a tickler file for follow-up, or you can use the Expected Return Date as a tickler on the Job Data Work Location page.



Note: For faculty sabbatical leaves, a return from leave is always processed between two concurrent but different leave types.

General Leaves of Absence

Use the procedures in this section to process a general leave of absence, including:

- DOF faculty sabbaticals (see “Processing a Faculty Sabbatical Leave” on page 172)
- Personal, research or consulting, or military leaves (see “Processing Leaves of Absence” on page 175)
- “Processing the Return from a Leave of Absence” on page 179

Processing a Faculty Sabbatical Leave

Follow these steps when a Dean of Faculty (DOF) faculty member starts or returns from sabbatical leave. The start of leave and the return are usually processed at the same time.



Important! Do not use this procedure if the faculty member is starting a disability leave of absence.

Faculty sabbatical leaves are identified by a specific leave type and pay reason code, and are always scheduled. Sabbatical leaves include:

- Bicentennial Preceptor leaves
- Chair’s leaves
- One-in-Six leaves
- Other Sabbatical leaves
- Quota leaves
- Special Sabbatical leaves
- University Preceptor leaves



To process the start of a DOF sabbatical leave:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee’s ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.


Tip! To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.

- b) Click the Search button. If more than one record is returned, select the faculty member's **0** record.
3. On the Work Location page, click the Add button to insert a new row in the record.
4. In the *Effective Date* field, type the start date of the leave in *mm/dd/yyyy* format, or click the Calendar button to select the date.
5. If the leave begins on the same date as the previous job action, type the next sequential number in the *Effective Seq* field.
6. In the *Action* field, click the down arrow and select the type of leave:
 - **Leave of Absence** (for a leave without pay)
 - **Paid Leave of Absence** (for a leave with pay, including full pay, partial pay, or half pay)
7. In the *Reason* field (second box to the right of Action/Reason):
 - If the *Action* is **Leave of Absence**, select one of these *Reasons*:
 - **Other Sabbatical - Without Pay**
 - **Quota Leave without Pay**
 - **Special Sabbatical - Without P(ay)**
 - If the *Action* is **Paid Leave of Absence**, applicable *Reasons* are:

Bicentennial Preceptor - Full	Quota - Full Pay
Bicentennial Preceptor - Half	Quota - Half Pay
Bicentennial Preceptor-Partial	Quota - Partial Pay
Chair's - Full Pay	Special - Full Pay
Chair's - Half Pay	Special - Half Pay
Chair's - Partial Pay	Special - Partial Pay
One-in-Six - Full Pay	University Preceptor - Partial
One-in-Six - Half Pay	University Preceptor -Full Pay
One-in-Six - Partial Pay	University Preceptor -Half Pay
Other Sabbatical - Full Pay	
Other Sabbatical - Half Pay	
Other Sabbatical - Partial Pay	



Note: Faculty sabbatical reason codes indicate whether the leave is at full, half, partial, or without pay. Be sure to specify the correct code.


8. The *Expected Return Date* field appears when you select the *Action of Leave of Absence*. Type the date of return or use the Calendar  button to select the date.

Tip! *The return date is the day after the leave ends. For example, if the faculty member's leave ends on 1/31/09, enter a return date of 2/1/09.*

9. If the leave is at half pay or partial pay, set the earnings distributions:



Tip! *If a faculty member with 50% duty time goes on leave at half pay, you must distribute the actual salary so the faculty member will receive one-quarter of the salary while on leave.*

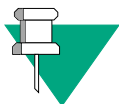
- a) Click the [Earnings Distribution](#) link at the bottom of the page.
- b) For *Earnings Distribution Type*, select **By Amount**.
- c) In the *Earn Code* field, select **001** (Base Salary).
- d) In the *Compensation Rate* field, type the amount of the monthly compensation rate to be paid to the employee.
- e) Click the Add  button to insert a new row in the record.
- f) In the *Earn Code* field, select **058** (No Pay).
- g) In the *Compensation Rate* field, type the amount of the monthly compensation rate that is not to be paid.



Important! *The total of the Compensation Rate distributions entered must equal the Compensation Rate displayed above the Earnings Distribution Type.*

10. Click the Save  button.

11. Immediately continue with the procedure, “Processing the Return from a Leave of Absence” on page 179.



Note: Faculty members often take two sabbatical leaves in a row. When this is the case, you must be sure to process a return from leave between the two leaves.

Processing Leaves of Absence

Follow these steps to place a faculty member or academic professional on a personal, military, or other non-disability-related leave of absence, either paid or unpaid, including a research or consulting leave.



Important! Do not use this procedure if the employee is starting a sabbatical, short-term disability, or worker's compensation leave.

For personal leaves of absence, the employee must submit a request for the leave to the department manager. The department manager then submits the request to the Office of the Dean of Faculty (DOF) for approval and processing.

Do you know the return date?

If the return from leave date is planned and known, or if an unexpected short leave has just been completed, you can process both the start of leave and the return from leave in the same update session (see "Processing the Return from a Leave of Absence" on page 179). However, if you do not know the return date when you place an employee on leave, you can process the return from leave separately at a later date.



Note: A leave of absence changes a person's employee status and benefits status, and in some cases starts billing for continued benefits coverage.



To process a regular leave of absence:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button.
 - c) If more than one record is displayed for the employee:
 - Select the **0** record if you are updating the primary job record.
 - Select the **1** record if you are updating the secondary job record.



Note: You might need to put the employee on leave on both records.

3. On the Work Location page, click the Add button. A new effective-dated row is created, with today's date as the effective date.
 4. In the *Effective Date* field, specify the date when the leave begins. Either type the date in *mm/dd/yyyy* format, or click the Calendar button to select the date. If the leave begins today, you will not need to change this value.





Note: For non-faculty sabbatical leaves, it is not necessary to return from one leave before being put on another leave.

5. If the leave is effective on the same date as the previous row, type the next sequential number in the *Effective Sequence* field.

6. In the *Action/Reason* fields, type or select the appropriate values:

Action	Reason
Leave of Absence or Paid Leave of Absence	Administrative Leave
	Disciplinary (Suspension)
	Military Reserve Training
	Military Service
	Other
	Personal
	Research Leave
Paid Leave of Absence	Family
	Humanitarian Relief Effort
	Severance
	Voluntary Separation
Leave of Absence	Budgetary/Funding
	Consulting
	Detached Service Agreement
	Disability Benefits Expired
	Family and Medical Leave Act
	I-9 Emp Auth Expired/Pending
	Less Than Full Year Leave
	Parental
	Pending Retirement
	Pending Transfer/Reappointment

7. When the *Expected Return Date* field appears, enter the day after the employee’s leave ends (for example, if the leave ends on 1/31/09, enter 2/1/09), typing the date in *m/d/yy* format, or using the Calendar  button.
8. For employees and staff members taking a leave at less than full pay (but not without pay), specify the distribution of paid and no pay amounts on the Earnings Distributions page:
 - a) Click the [Earnings Distribution](#) link at the bottom of the page to display the Earnings Distribution page.
 - b) In the *Earnings Distribution Type* field:
 - For DOF faculty members and academic professionals, select **By Amount**.
 - c) Specify the amount or percent to be paid during the leave:
 - In the *Earn Code* field, type **001** (regular earnings).

- For DOF staff, type the amount of the monthly compensation rate to be paid to the employee in the *Compensation Rate* field.
- d) Click the Add  button to insert a new row for the unpaid amount:
 - In the *Earn Code* field, type **058** (No Pay).
 - For DOF staff, type the remaining amount of the monthly compensation rate that is **not** to be paid in the *Compensation Rate* field.



Important! *If Compensation Rate amounts are entered, the total of the Compensation Rates entered must equal the employee's Compensation Rate above the Earnings Distribution Type.*

9. Click the Save  button.

Related Procedures:

- If the return date is known, process the return from leave as a future-dated action (see “Processing the Return from a Leave of Absence” on page 179).

Follow-Up Actions:

- If the return date is not known or not definite, use the *Expected Return Date* field on the Work Location page as a tickler or put the paperwork into a tickler file to remember to follow-up when the estimated return date approaches.
- In some cases, you must wait to process the return until you are notified by the appropriate office (central or departmental) that the employee can return. For example, if the employee is on leave because I-9 has expired, wait for notification from the Payroll office before processing the return from leave.


Processing the Return from a Leave of Absence

Follow these steps to process a return from a general leave of absence. You can process both the start of leave and the return from leave in the same update session, or you can process the return from leave separately at a later date.



To process the return from a leave of absence:

1. Choose one:

- If you are processing the start of leave and the return from leave in one session:
 - a) Navigate to the Work Location page, as needed, either by clicking the [Job Data](#) link at the bottom of the page, or the **Work Location** tab at the top of the page.
- If you are processing the return from leave separately:
 - a) Select **Workforce Administration > Job Information > Job Data**.
 - b) On the Find page, type the *EmplID* and click the Search  button.



***Tip!** To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.*

- c) If more than one record is returned, select the **0** record if you are updating the primary job record, or select the **1** record for a secondary job.




Important! For a faculty member on sabbatical leave, always select the **0** record.

2. On the Work Location page:

- a) Click the Add  button to insert a new row in the record.
- b) In the *Effective Date* field, specify either the date when the employee plans to return from leave, or the date the employee returned from leave. Either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
- c) In the *Action* field, select **Return from Leave**.



Tip! The *Expected Return Date* field disappears when you select the *Action*.

- d) In the *Reason* field, select:
 - **Return in a different month.**
 - **Return in the same month.**
3. Click the [Earnings Distribution](#) link and verify that **None** is selected in the *Earnings Distribution Type* field.
4. Click the Save  button.

Disability Leaves

The procedures in this section describe how to process disability leaves, including:

- “Processing a Short-Term Disability (STD) Leave” on page 182
- “Processing a Worker’s Compensation Leave” on page 189
- “Processing a Long-Term Disability (LTD) Leave” on page 193

Disability leaves are processed on the employee’s record **0**. For Short-Term Disability and Worker’s Compensation leaves, the system automatically updates both the **0** and the **1** record if the employee is active in more than one job.

Processing a Short-Term Disability (STD) Leave

Use the procedures in this section to start, track, and process the return from a short-term disability (STD) leave. The short-term disability leave must be authorized by McCosh Health Center.

When you enter information on the Short-Term Disability pages, PeopleSoft automatically calculates full and partial per-pay compensation rates, and non-tax and taxable earnings distributions. These calculations depend on the employee's years of service, the number of short-term disability leaves taken within the year, and staff type.

In addition, PeopleSoft automatically updates the employee's Job Data record with the correct action, reason, effective date, earnings distribution (**041**), and short-term disability status when the Begin Date of the leave is reached on the calendar (that is, the future-dated actions will not be processed in advance).



Note: If the employee is working in two jobs, a short-term disability row is inserted automatically on both the **0** and **1** records. Usually, you will not need to make adjustments on the record **1** row. If you need to override the pay rates manually, however, you must make the adjustments on both the **0** and **1** records.

Entering the Start of a Short-Term Disability Leave




Follow these steps to update PeopleSoft when an employee starts a short-term disability leave.



To process the start of a short-term disability leave:


1. Select **Workforce Administration > Job Information > Princeton Data > Short Term Disability**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

***Tip!** To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.*

- b) Click the Search  button. If multiple records are returned, select the employee's **0** record by clicking any link on the row.
3. On the STD Info page:
 - If the *Begin Dt* field is blank, continue with Step 4.
 - If the *Begin Dt* field is not blank (indicating that the employee has had one or more previous STD leaves) click the Add  button to the right of the STD status (unlabeled) field to insert a new row.
4. In the *Begin Dt* field, specify the start date of the short-term disability. Either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.



Important! Do **not** enter the *Return Dt* at this time, even if known. You must complete the leave details and **save this record** before processing the return from leave, as described in “Entering the Return from a Short-Term Disability Leave” on page 188.

5. Leave the default value of **Not Processed** in the unlabeled status field.
6. You may use the *Tickler Dt* field to type the date when the employee is expected to return from disability leave or click the Calendar  button to select the date.


7. Click the Save  button to save the record.



Note: The STD status field (top right) should remain **Not Processed**.

8. After the process has run overnight, check that the status field at the top right of the screen has changed to **STD Full**, and the appropriate STD leave row was added to Job Data. If not, contact your system manager.




Tip! If the leave is retroactive, you may need to scroll backward to locate the record in the Job Data page group. You should select Include History on the Find page, or click the Include History  button to see all records.

Entering a Partial Short-Term Disability Leave

If a person is on a partial leave, and will be paid with distributions split between STD earnings and regular salary, you must process a Job Earnings Distribution change when the partial distributions begin. You must also remember to return the distributions to **None** when processing the person's return from leave.


You can follow the instructions below to make adjustments to the Job Data Earnings Distribution page both when a person begins a partial STD leave and if a person returns to full-time STD leave status from a partial STD leave.


To update the earnings distribution for a partial STD leave:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type full or partial search criteria in any of the search criteria fields.
 - b) Click the Search  button. If multiple records are returned, select the desired employee record from the resulting search results by clicking on any link in the row.




Important! If the faculty member or academic professional has multiple employee records, be sure you select the appropriate record (**0** or **1**) from the search results.

3. On the Work Location page, click the Add  button to insert a new row into the record.

4. Type the *Effective Date* of the change in *mm/dd/yyyy* format, or click the Calendar  button to select the effective date. If this is the same date as the start date of the STD leave, update the *Effective Sequence* to **1**.

Tip! You may also add a *Job Note* to clarify the situation. See page 39 for instructions regarding *Job Notes*.



5. In the *Action* field, select **Earnings Distribution Change**.
6. For *Reason*, select **Change in Earnings**.
7. Click the [Earnings Distribution](#) link to display the Earnings Distribution page.
8. In the *Earnings Distribution Type* field, select **By Percent**.
9. In the *Earn Code* field, type the code or click the Lookup  button to look up and select the code.

001	Regular Earnings
041	Short-Term Disability Earnings

10. Type the percentage of time allocated to each earnings code in the *Compensation Rate* field. For example, if someone is on a half-time leave, **50%** of their salary would go on **001** and **50%** on **041**. If they are returning to full-time leave, **100%** of their salary would go on **041**.



Important! The total of the percentages in the *Compensation Rate* fields must equal 100%, or the page cannot be saved.

11. If necessary, click the Add  button to insert a new row into the record, and repeat Step 9 and Step 10.
12. Click the Save  button to save the distribution changes.

Short-Term Disability for Faculty Members in the Summer

Disability coverage for faculty over the summer months can be a bit complicated. Current policy as of the summer of 1997 (from a benefits specialist, now retired) is as follows:

Faculty with summer salary are eligible for Temporary Disability payments as a summer salary replacement. Faculty without summer salary are not eligible for temporary disability payments over the summer. If they become disabled over the summer, temporary disability payments start in September. The University plan covers disabilities that begin within the two week period after the end of the academic year (June 30). However, if the person is not receiving a summer salary, salary replacement does not begin until September.

Faculty members who are not eligible to receive temporary disability payments over the summer may apply to the State Temporary Disability Plan.

To clarify further—If a faculty member submits a request for summer salary and then needs to go on STD, the summer salary is still paid in full and covered under the STD policies. This is because the faculty member in good faith intended to complete the summer work, but health issues prevented it.

However, a faculty member is not permitted to be on STD (or know he or she will be going on STD, for example, for a scheduled operation) and then subsequently submit a request for summer salary. In those cases, the policy is to not approve the summer salary request, since both we and the faculty member already know they cannot meet their obligation to the funding agency to perform the work.

Tracking a Short-Term Disability Leave




After you have entered a record for the STD leave, you can change the tickler date and comments fields on the STD Info page. These fields are queried to remind you of dates, such as paperwork deadlines, and when the employee will be returning.



To update STD tracking information and tickler dates:

1. Select **Workforce Administration > Job Information > Princeton Data > Short Term Disability.**
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter all or part of the first name in the Name field and the last name in the Last Name field.

- b) Click the Search  button. If multiple records are returned, select the employee's **0** record by clicking any link on the row.
3. On the STD Info page, specify the date of the next action you want to be reminded of in the *Tickler Dt* field. Either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
4. In the *Comments* field, type a note to remind you of what you want to do on the tickler date.
5. Click the Save  button to save the tickler date.

In addition, for the DOF Disability Administrator, there is a report in Princeton's Information Warehouse that is a useful tool (ZHDQ9709 DOF Faculty & Staff on STD). See your system manager for access to the DOF Reports folder and for information on running the report.

As a person continues on STD, preparations must be started to have them apply for long-term disability, if necessary (see "Processing a Long-Term Disability (LTD) Leave" on page 193). Usually around the 13th week, you need to start working with McCosh Health Center and the Office of Risk Management to make this determination.

Entering the Return from a Short-Term Disability Leave

Follow these steps to update PeopleSoft when an employee returns from a short-term disability leave. This process returns *Earning Distr* to **None** (normal distribution) for both full and partial leaves.




Tip! If the leave was complex, talk to the DMG group. They may need to process the return from leave.




To process a return from a short-term disability leave:

1. Select **Workforce Administration > Job Information > Princeton Data > Short Term Disability**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search  button. If multiple records are returned, select the employee's **0** record by clicking any link on the row.
3. On the STD Info page, specify the date when the employee returned from short-term disability in the *Return Dt* field. Either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
4. Click the Save  button.
5. After the process runs overnight, check that the status field at the top right of the screen has changed to **Returned**, and the appropriate STD leave row was added to Job Data. If not, contact your system manager.



Tip! If the leave is retroactive, you may need to scroll backward to locate the record in the Job Data page group. You should select **Include History** on the Find page, or click the Include History  button to see all records.

Processing a Worker's Compensation Leave

When an employee goes on worker's compensation leave because of a work-related injury or illness, the Office of Risk Management enter the data for the leave. You would only need to use these procedures if the Office of Risk Management needs backup.

When information is entered on the Workers Compensation pages, PeopleSoft automatically calculates full and partial per-pay compensation rates, and non-tax and taxable earnings distributions.

In addition, PeopleSoft automatically updates the employee's Job Data record with the correct action, reason, effective date, earnings distribution (**040**), and worker's compensation status. To help you monitor dates and manage the case, you can enter a tickler date on the Comp Info page.



Note: If the employee is working in two jobs, a worker's compensation row is inserted automatically on both the **0** and **1** records. Usually, you will not need to make adjustments on the record **1** row. If you override the pay rates manually, however, you must make the adjustments on both the **0** and **1** records.

Entering the Start of a Worker's Compensation Leave

Follow these steps to update PeopleSoft when an employee starts a worker's compensation leave.

Before you start this procedure...

- *Make sure the leave has been approved by the Office of Occupational Medicine and the Office of Risk Management on the main campus, or by the Office of Human Resources at the Plasma Physics Laboratory (PPL).*



To process the start of a worker's compensation leave:

1. Select **Workforce Administration > Job Information > Princeton Data > Workers Compensation.**
2. On the Find page:

- a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.


Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button. If multiple records are returned, select the employee's **0** record by clicking any link on the row.
3. On the *Comp Info* page:
 - If the *Begin Dt* field is blank, continue with Step 4.
 - If the *Begin Dt* field is not blank (indicating that the employee has had one or more previous Worker's Compensation leaves) click the Add button to the right of the status (unlabeled) field to insert a new row for this leave.
 4. In the *Begin Dt* field, specify the start date of the worker's compensation leave. Either type the date in *mm/dd/yyyy* format, or click the Calendar button to select the date.



Important! Do **not** enter the *Return Dt* at this time, even if known. You must complete the leave details and save the record before processing the return from leave.

5. In the *Tickler Dt* field, type or select the date when the next action should take place in monitoring the worker's compensation case.
6. In the *Comments* field, type a note explaining the significance of the tickler date.
7. The *Per Pay Salary* field defaults to appropriate value.
8. If *Multi Dis w/in Anniv Yr* is selected () (indicating that the employee has already had a leave within the year) you might need to process a partial pay leave manually:
 - a) Make a note of the number indicated in *Days in Prev*.
 - b) Click the **Comp Pay** tab.
 - c) Select () the *Comp Override Flag*.
 - d) Adjust the full pay end date by subtracting the number of days in the *Days in Prev* field (noted in Step a) from the *Full End DT*.

- e) Type the appropriate value in the *Part Begin Dt* field.
9. Click the Save  button.




Tracking the Worker's Compensation Leave

After you have entered the record for a worker's compensation leave, you can change the tickler date and comments fields on the Comp Info page. These fields are queried to remind you of dates, such as paperwork deadlines, and when the employee will be returning.



To update worker's compensation tracking information and tickler dates:

1. Select **Workforce Administration > Job Information > Princeton Data > Workers Compensation**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.
 - b) Click the Search  button. If multiple records are returned, select the employee's **0** record by clicking any link on the row.
3. On the Comp Info page, specify the date of the next action you want to be reminded of in the *Tickler Dt* field. Either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
4. In the *Comments* field, type a note to remind you of what you want to do on the tickler date.
5. Click the Save  button to save the tickler date.

Processing the Return from a Worker's Comp Leave




Follow these steps to update PeopleSoft when an employee returns from worker's compensation leave.



To process the return from a worker's compensation leave:

1. Select **Workforce Administration > Job Information > Princeton Data > Workers Compensation**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

***Tip!** To search by first and last name, enter all of part of the first name in the Name field and the last name in the Last Name field.*

- b) Click the Search  button. If multiple records are returned, select the employee's **0** record by clicking any link on the row.
3. On the Comp Info page, specify the date when the employee returned from worker's compensation leave in the *Return Dt* field. Either type the date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
4. Click the Save  button.

Processing a Long-Term Disability (LTD) Leave

Follow these steps to update PeopleSoft when an employee starts a long-term disability leave.

An employee who is approved for long-term disability receives up to 60% of monthly pay during the leave (including Social Security and Worker's Compensation). Long term disability is paid by an outside insurance company, so the employee no longer receives a Princeton paycheck. However, the employee continues to receive certain benefits, such as health coverage and Princeton University retirement contributions. As a result, the employee is placed on a leave with benefits.

What if the employee has two jobs?

If the employee has two jobs, the secondary record **1** should be terminated before the long-term disability is processed on record **0**.




Important! If the employee is still listed as being on a short-term disability or worker's compensation leave, immediately notify your STD or worker's compensation administrator. Do not process the end of leave in HCM until the administrator has terminated the leave. This is usually an overnight process, so you should be able to enter the LTD leave the next day.



To process a long-term disability leave:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.
 - b) Click the Search button.
 - c) If multiple records are returned, select the employee's **0** record by clicking on any link in the row.
3. On the Work Location page, click the Add button to the far right of the *Effective Date* field.

4. If different from today's date, type the *Effective Date* of the disability in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
5. If the leave is effective on the same date as the previous row, type next sequential number in the *Effective Sequence* field.
6. In the *Action* field, select **Long Term Disability With Pay**.
7. In the *Reason* field, select **Long Term Disability W/Pension**.



Note: You may select **LTD Cash in Lieu of Pension** only if authorized by your office and payroll.

8. Leave the *Expected Return Date* blank.
9. In the *Mail Drop* field, change the current value to **999L** (for Unspecified Department - LTD).
10. Click the [Earnings Distribution](#) link at the bottom of the page and perform the following

- a) In the *Earnings Distribution Type* field, select **By Percent**.
- b) In the *Earn Code* field, select **057** (for nonpaid earnings with pension contributions for the salary amount the employee would have been paid).



Tip! *Employees on long term disability are paid a partial pay amount, but the payments are handled by an outside company, so the employee does not receive a check from the University.*

- c) In the *Distrb %* field, type **100**.
 - d) If additional earnings distribution rows are displayed, delete them by clicking the Delete  button for each row that needs to be removed.
11. Click the [Employment Data](#) link at the bottom of the page. Locate the *Last Verification Date* field and enter the date when the person went on LTD (the same date as the *Effective Date* used in the Job Data/Work Location page).
 12. Click the Save  button.





Entering the Return from a Long-Term Disability Leave

Follow these steps to update PeopleSoft when an employee returns from a long-term disability leave.



To process a return from a long-term disability leave:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter all or part of the first name in the Name field and the last name in the Last Name field.
 - b) Click the Search  button.
 - c) If multiple records are returned, select the employee's **0** record by clicking on any link in the row.
3. On the Work Location page, click the Add  button to the far right of the *Effective Date* field.
4. If different from today's date, type the *Effective Date* of the return from disability in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
5. In the *Action* field, select **Return from Disability**
6. In the *Reason* field, select **Return from LTD**.
7. Click the [Earnings Distribution](#) link at the bottom of the page, and select **None** in the *Earnings Distribution Type* field.
8. Click the [Employment Data](#) link at the bottom of the page. Blank out the date in the *Last Verification Date* field.
9. Click the Save  button.

Terminations, Deaths, and Retirements

This section describes how to process the termination or retirement of a Princeton University employee, or the death of an active employee, retiree, or former employee. The procedures are:

- “Processing a Job Termination, Retirement, or Death for a Regular Employee” on page 198
- “Processing a Death for an Employed Retiree” on page 203
- “Processing a Death for a Terminated Employee” on page 205

About Terminations

A termination is processed when one of the following occurs:

Job Termination

A regular termination occurs when the employee voluntarily or involuntarily leaves the University. This includes terminations resulting from the end of a term appointment when there is no reappointment.

Retirement

Retirement occurs when an employee leaves Princeton University after age 55 and has at least 10 years of service (for employees hired on or after January 1, 2003, an additional 75 points is required).



Tip! For an explanation of points, and qualifications for retirement, see <http://www.princeton.edu/hr/ben/retire.htm>.

All employees must retire effective the first day of the month. If the employee wants to retire mid-month, the employee may use vacation pay or take a leave without pay to complete the month.

Death

The death of an active employee or employed retiree is processed by entering a termination record in Job Data. For a previously terminated employee, the date of death is entered in Personal Data (see “Effective Date of Termination” on page 197).

Effective Date of Termination

Termination or retirement. The effective date of a termination or retirement is always the day *after* the last day worked.

Death. For the death of an active or on-leave employee, or of a retiree, the effective date of the termination (the death status) on the **Termination/DEA** record in Job Data is the day after death.

For the death of a terminated employee who no longer has an active job record, you enter the actual date of death on the Biographical Details page in the Personal Information, Modify a Person component, since you cannot process a second termination record in Job Data (see “Processing a Death for a Terminated Employee” on page 205).

What If the Employee is Eligible for Vacation Pay?

If an employee is eligible for vacation pay upon termination or retirement, the vacation is paid by hours, rather than days, and is entered on the Additional Pay page (see “Additional Pay” on page 158). If the vacation pay is paid during the pay period after termination, you must contact the Payroll office to issue a check manually for the additional pay. Faculty members and visiting staff are **not** eligible for vacation pay.

Notification of Termination, Retirement, or Death

You will be notified of a termination, retirement, or death in one of the following ways:

- The department head submits a Termination/Retirement form to the appropriate Human Resources office.
- A department notifies the Dean of Faculty office that an employee has come to the end of a term appointment and has no reappointment.
- The Office of the Dean of the Faculty determines that a termination is pending, based on the Expected Job End Date report in the Information Warehouse or other sources.
- Notification is received from the University Secretary’s office, from the family, or when an obituary is seen from a reputable source (i.e., the New York Times) that an employee or retiree has died.
- A faculty member submits a letter of resignation, as indicated in the report to the Board of Trustees.

Processing a Job Termination, Retirement, or Death for a Regular Employee

Follow these steps to process a regular employee's termination, retirement, or death in PeopleSoft.

Is this a secondary job or appointment?

This procedure describes how to process a termination of a primary job or appointment on the employee's primary record **0**. If you are processing the termination of an employee in a secondary job or appointment, you must update the employee's secondary record **1** (see "Terminating a Secondary or Post-Retirement Job" on page 201).

Is this an employed retiree or former employee?

If you are processing the death of an employed retiree, see "Processing a Death for an Employed Retiree" on page 203. If you are processing the death of a previously terminated employee, see "Processing a Death for a Terminated Employee" on page 205.

Before you start this procedure...

- *If you are processing an action for a DOF employee, make sure there are no pending actions on the Recommendation page (**Workforce Administration > Job Data > Princeton Data > Recommendation Status**).*



To process a termination, retirement, or death:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

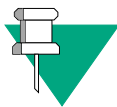
Tip! *To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.*

- b) Click the Search button. If multiple records are returned, select the employee's **0** record by clicking on any link in the row.



Note: If both a **0** and a **1** record are listed, make sure the **1** record has been terminated. If it has not been terminated, you must terminate the **1** record before terminating the **0** record.

3. On the Work Location page, click the Add button to add a new row.
4. In the *Effective Date* field (which defaults to today's date), type or select the effective date of the termination, death, or retirement.



Note: The effective date of a termination must always be the day after the last day worked, or if a person has died, the day after the person's date of death. It represents the first day not on the job, in other words, the first day in terminated status.

5. In the *Action/Reason* fields, select the appropriate values:

Select Action	Select Reason
Termination	If completing the end of an appointment or special assignment, use of these reasons: End of Appointment Assignment Completed End Temporary Employment
	For involuntary termination, use such reasons as unsatisfactory performance, discharge for cause, layoff, I-9 incomplete/invalid, etc.
	For voluntary termination, use such reasons as personal, relocation, family reasons, transportation, health, return to school, etc.
	Death (while active, on leave, or after retirement)
Terminated with Pay	HR Special
	Severance
	Voluntary Separation
	Term w Pay and No Benefits
Retirement	Retire
	Retire - End of LTD
Retirement with Pay	Retirement with Pay



Tip! You will not be able to save this action if the Expected Job End Date is less than the date of the separation. If this situation arises, you must process a reappointment or extension to term before processing the termination.

6. Click the Save  button.



Tip! When you click Save, the Mail Drop Code will automatically be set to **999**. This directs all additional checks and W-2 forms to the Payroll Office for distribution to the person, instead of sending them to the home department. If the person is rehired, the mail drop will automatically be updated to the home department.

Related Procedures:

- If the employee is entitled to vacation pay as noted on the Termination/Retirement form, see “Additional Pay” on page 158.
- If the person has a new address, see “Updating Non-Campus Addresses and Contact Information” on page 222.
- If a faculty member is granted Emeritus status by the Board of Trustees (almost always for retiring, tenured faculty, but there are exceptions), then:
 - Add the Faculty Emeritus mail code as described in “Adding or Removing a Person from a Mailing List” on page 96, and
 - Add the Faculty Emeritus title to the Administrative Posts as described in “Updating Administrative Posts” on page 69 and terminate any titles.
- If the terminated, retiring or deceased active employee has any open-ended title(s) on the Administrative Posts page, these will need to be end-dated to match the separation date, as described in “Updating Administrative Posts” on page 69.
- If the employee has died, alert HR Benefits (Stacey Burd and Amy Butterworth) that the person has died, so they can reach out to survivors about benefits.

Terminating a Secondary or Post-Retirement Job

The majority of secondary jobs (except for DOF faculty purchases) are held by retirees who are hired as non-benefits-eligible, casual hourly employees or lecturers, who retain their benefits on the retiree record. When the secondary job ends, the employee's secondary record **1** must be terminated.

Does the employee have two benefits-eligible jobs?

Occasionally, the Office of Human Resources might process two records for job sharing, where the employee works two, separate, benefits-eligible jobs, totaling 100% duty time. In this case, if the position on the **0** record is terminated before the position on the **1** record, you must terminate the **1** record for the secondary job, and then move the data on the secondary job to the **0** record. When the secondary job ends, you can terminate the **0** record.

Is the employee a DOF faculty purchase?

For DOF faculty purchases, the termination of the secondary job is usually entered when the purchase is entered. However, you may need to process a termination separately in either of two situations:



- If the termination date changes, you will need to delete the existing termination row, adjust the **1** record, and add a new termination row.
- If the employee's primary job (on the **0** record) is terminated before the end of the purchase, you must terminate the **1** record, and move the remainder of the faculty appointment to the **0** record (see "Entering Promotions, Transfers, or Reclassifications" on page 133). Then, when the faculty appointment is completed, you can terminate the **0** record.



To terminate a secondary or post-retirement job:


1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

***Tip!** To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.*

- b) Click the Search  button. Select the employee's 1 record by clicking on any link in the row.
3. On the Work Location page, click the Add  button to insert a row in the record.
4. In the *Effective Date* field, type or select the date when the secondary job ends.



Note: The effective date of a termination must always be the day after the last day worked, or if a person has died, the day after the person's date of death. It represents the first day not on the job, in other words, the first day in terminated status.

5. In the *Action* field, select **Termination**.
6. In the *Reason* field, select the appropriate value.
7. Click the Save  button.

Processing a Death for an Employed Retiree

Follow these steps when you are notified of the death of a retiree who has an active employee status on record **1**.



Post-retirement hires have both a **0** and a **1** record. When an employed retiree dies, the termination must be entered on both records, but with a different *Reason* for the **Termination Action**.

- The **0** record should reflect the death, with an *Action/Reason of Termination/DEA* (see page 199).
- The **1** record should reflect the termination, but with an *Action/Reason of Termination/OTH*.




To terminate a post-retirement hire:

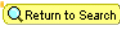
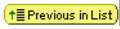


1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.
 - b) Click the Search  button. Select the retiree's **1** record by clicking on any link in the row.
3. On the Work Location page, click the Add  button to insert a row.
4. For *Effective Date*, type or select the day after the retiree's death.



Note: The effective date of a termination must always be the day after the last day worked, or if a person has died, the day after the person's date of death. It represents the first day not on the job, in other words, the first day in terminated status.

5. In the *Action* field, select **Termination**.
6. In the *Reason* field, select **Other**.
7. Click the Save  button to save the **1** record.

8. Display the retiree's **0** record using one of these methods:
 - Click the Return to Search  button to return to the search list and select the retiree's **0** record.
 - Click the Previous in List  button to go directly to the retiree's **0** record.
9. On the Work Location page, click the Add  button to insert a row.
10. For *Effective Date*, type or select the day after the retiree's death.
11. In the *Action* field, select **Termination**.
12. In the *Reason* field, select **Death**.
13. Click the Save  button.



Tip! If you navigate to the *Biographical Details* page in the *Modify a Person* page group, you will see that the *Date of Death* has been filled in.



Note: Age will no longer be calculated based on current date, but is frozen as of the date of death.

Processing a Death for a Terminated Employee




Follow these steps when you are notified of the death of a terminated employee.¹

PeopleSoft does not permit one employee termination record to be followed by another. If the employee has already been terminated on all employment records, you must enter the death directly on the Biographical Details page in the Modify a Person component.



To enter date of death on the Eligibility/Identity page:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the employee's ID in the *EmplID* field, or full or partial search values in one or more of the search criteria fields.

Tip! To search by first and last name, enter the first three characters of the first name in the Name field and the last name in the Last Name field.
 - b) Click the Search  button. If both a **0** record and a **1** record are returned for the person, you can select either record.
3. In the Biographic Information section of the Biographical Details page, type the actual *Date of Death* (not the day after) in *mm/dd/yyyy* format, or click the Calendar  button to select the date from a calendar page.
4. Click the Save  button.

1. This procedure is also described in “Specifying Date of Death for a Terminated Employee” on page 221.

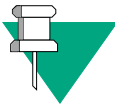
Processing a Death for a Regular Employee on Short-Term Disability or Worker's Compensation Leave

If a person should die while on short-term disability leave or worker's compensation leave, you must first end the short-term disability or worker's compensation leave in PeopleSoft before you can begin deceased processing action.¹



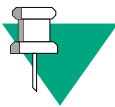
To process a death for a regular employee on Short-Term Disability or Worker's Compensation leave:

1. Enter an end date for the employee's short-term disability or worker's compensation leave. See "Entering the Return from a Short-Term Disability Leave" on page 188 or "Processing the Return from a Worker's Comp Leave" on page 192.



Note: The return from short-term disability or worker's compensation process runs overnight. If you need to process the return immediately, in *JOB*, set *TER* sequence number to **1**, set *Earnings Distribution* to **None**, and Save. Then insert the *Return from STD* row before the *TER* row, with *Earnings Distribution* set to **None**.

2. Select **Workforce Administration > Job Information > Job Data**.
3. On the Find page:
 - a) Type the employee's ID in the *EmplID* or partial search information in the other search fields.
 - b) Click the Search button. If multiple records are returned, select the employee's **0** record by clicking on any link in the row.



Note: If both a **0** and a **1** record are listed, make sure the **1** record has been terminated. If it has not been terminated, you must terminate the **1** record before terminating the **0** record (see page 203 for details).


4. On the Work Location page, click the Add button to add a new row to the record.

1. This procedure is also described in "Specifying Date of Death for a Terminated Employee" on page 221.

5. In the *Effective Date* field (which defaults to today's date), type or select the date of the day after the death occurred.



Note: The effective date of a termination must always be the day after the person has died. It represents the first day not on leave, in other words, the first day in terminated status.

6. In the *Action/Reason* fields, select **DEA** (death while active, on leave or after retirement):
7. Click the Save  button.

Updating Personal Data and Preferences

7

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About Personal Data Updates

Personal data are characteristics specific to a person, such as name, address, birthdate, and gender. Personal data is shared across Human Resources, Payroll, Benefits, and Student Records. When you enter personal data, you should make sure that it is as complete as possible.



Important! Only authorized users in the Dean of Faculty, Human Resources, Plasma Physics Laboratory, or Payroll office should update personal data for a Princeton University active/on-leave employee, retiree, or benefits-eligible survivor, with the exception that changes can be submitted by the employees themselves using HR Self-Service.

Some employee-entered updates (name and marital status) require the approval of central office staff (see “Using the Worklist to Approve Name and Marital Status Changes” on page 217). Others (such as home and mailing addresses, personal phone numbers, personal email addresses, and emergency contact information) are automatically updated. There are a number of daily audit reports that can be used to monitor this data, so you can adjust it if necessary.

You can add or update personal data on the Personal Information components in Workforce Administration. This chapter contains procedures for:

- “Updating Non-Campus Addresses and Contact Information” on page 222
- “Changing Biographic Data” on page 212
- “Adding or Updating Emergency Contacts” on page 234
- “Entering a Preferred Name” on page 237

Changing Non-Effective-Dated Personal Data

Most personal data fields other than name, address, and marital status, are non-effective-dated (for example, birthdate and Social Security number). To make changes to these fields, simply insert the new data or correct (overwrite) the existing data on the appropriate page.

Changing Effective-Dated Personal Data

Name, addresses, gender, and marital status are *effective-dated* fields. The information in these fields is associated with an effective date, either the date the record was created for the person, or a later date if the record has changed. This allows you to review a history of the employee's previous names, addresses, or marital status.

Correcting Effective-Dated Fields

If you are correcting an error in an effective-dated field, you make the change in "correct history" mode. This allows you to write over the previous data and leave the effective date unchanged.

For example, suppose you receive a department form that specifies the name "Marie Jones," and you enter a new record using that name. But when you receive a Personal Data form from the employee, she specifies the name "Marielle Jones." In this case, you would access the existing record and correct the first name, without changing the effective date of the record.

Updating Effective-Dated Fields

When you update an effective-dated field to specify a new name, address, or marital status, you must create a new row in the employee record and specify an effective date for the new information.

For example, suppose Marielle Jones submits a Personal Data form indicating that she has married and is changing her name to "Marielle Jones-Smith." In this case, you must enter a new row in the record, specify the effective date of the change, and enter the new marital status and new name.

Changing Biographic Data

This section includes procedures for:

- “Updating Name, Marital Status, and Gender” on page 212
This includes processing worklist changes submitted through Employee Self-Service.
- “Updating Birthdate, SSN, and Citizenship” on page 219
- “Specifying Date of Death for a Terminated Employee” on page 221

Updating Name, Marital Status, and Gender

Follow these steps to update a person’s name or marital status on the Biographical Details page in the Modify a Person component.

Does the employee have a professional name?

The **Additional Names** menu option allows you to enter a professional or preferred name, specify a name with an accent character, or view name history. See “Adding or Updating a Preferred Name” on page 237.



Important! Keep in mind that name and marital status fields are effective-dated. If you are uncertain about whether you need to specify an effective date for your change, see “Changing Effective-Dated Personal Data” on page 211.

Updating or Correcting the Name and Related Changes

You can enter changes to names and marital status directly when necessary, on behalf of the employee. Most often, these changes come to us through the Personal Data Form, but may also come by email and phone. It is preferable to have all change requests in writing, directly from the employee.



To update or correct the name with related changes:

1. Select **Workforce Administration > Personal Information > Modify a Person**.

2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If you are correcting a previous error (for example, a misspelled name) select *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. If you are correcting the name in Correct History mode,
 - a) Click the [Edit Name](#) link in the Name section.



Tip! The link will be [View Name](#) if you are not in *Correct History* mode.

- b) Type over the incorrect name with the correct name.
 - c) Click the OK button to return to the Biographical Details page.

If you are updating the name (you did *not* select *Correct History* in Step 2):

- a) On the Biographical Details page, click the Add button in the *Personal Data* area to add a new row to the record.
 - b) Type the *Effective Date* of the change in *mm/dd/yyyy* format (defaults to current date) or click the Calendar button to select the date from a calendar page.
4. Make sure *Format Type* is **English** (default).
5. Click the [Edit Name](#) link.
6. As needed, correct or update the appropriate name field(s):
 - a) Leave the *Prefix* field blank.
 - b) Type the new *First Name*.
 - c) If given, type the new *Middle* name, or a middle initial with punctuation (for example, **P.**).

- d) Type the new *Last Name* (without any suffix).



Note: If a person indicates that they have only one name, enter this name in the *Last Name* field, and enter a period (.) in the *First Name* field. PeopleSoft will not allow you to save the record without at least one character in both the *First Name* and *Last Name* fields.



Tip! The name can include punctuation such as an apostrophe (*O'Connor*) or hyphen (*Jones-Martin*), but not an accent mark or a comma. If the name contains an accent mark, see “*Entering an Accent or Special Character in a Name*” on page 241.

- e) Type the new *Suffix*, if any (for example, **Jr.**, **Sr.**, **III**) or click the down arrow to select from a list.
 - f) Click the OK button to return to the Biographical Details page. To see both names there, click the [View All](#) link, or use the navigation header arrows to scroll through the Name rows.
7. If the name is changing because of a change in marital status,
 - a) In the Biographical History area, click the Add Row button.
 - b) Type the date of the marital status change in the *Effective Date* field in the Biographical History area, or use the Calendar button to select the date.
 - c) In the *Marital Status* field, click the down arrow and select the appropriate new status.
 - d) Enter the date when the status changed in the *As of* field.
 8. If the name is changing because of a change in gender,
 - a) In the Biographical History area, click the Add Row button.
 - b) Type the date of the gender change in the *Effective Date* field in the Biographical History area, or use the Calendar button to select the date.
 - c) In the *Gender* field, click the down arrow and select either **Male** or **Female**; do not select **Unknown**.
 9. If you have entered all the necessary personal data changes, click the Save button.

Changing Only the Marital Status

If the name is not changing with the marital status, follow this procedure to change the marital status.



To update or correct the marital status:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If you are correcting a previous error select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. To correct the current *Marital Status*, select the new value from the drop-down list.

To change the person's *Marital Status*,

- a) In the Biographical History area, click the Add Row button.
 - b) Type the date of the marital status change in the *Effective Date* field in the Biographical History area, or use the Calendar button to select the date.
 - c) In the *Marital Status* field, click the down arrow and select the appropriate new status.
 - d) Enter the date when the status changed in the *As of* field.
4. If you have entered all the necessary personal data changes, click the Save button.

Changing the Gender

If the gender is changing or requires correction, follow this procedure.




To update or correct the gender:





1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If you are correcting a previous error select () *Correct History*.
 - c) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. To correct an erroneous *Gender*, select the correct value from the drop-down list. You must select **Male** or **Female**; if not specified, select **Unknown**.

To change the person's *Gender*,

- a) In the Biographical History area, click the Add Row  button.
 - b) Type the date of the marital status change in the *Effective Date* field in the Biographical History area, or use the Calendar  button to select the date.
 - c) In the *Gender* field, click the down  arrow and select **Male** or **Female**; if not specified, select **Unknown**.
4. If you have entered all the necessary personal data changes, click the Save  button.

Using the Worklist to Approve Name and Marital Status Changes

You can use the worklist to process change requests for name and marital status entered through the Employee Self Service pages.



To approve Name and Marital Status change requests:

1. In PeopleSoft, click the [Worklist](#) link in the blue banner at the top of the page. A list is displayed showing the employee who submitted the request for a change, the date when the request was submitted, and the type of change requested. If the list is blank, no change requests were entered on the previous day.
2. Review the list to see if any employees submitted multiple changes:
 - A marriage or divorce will typically result in two items, a name change and a marital status change.
 - An employee may submit the request multiple times.
3. Click the link in the Link column for the change request you want to review.
4. Review the change request, and determine whether to
 - Approve the change.
 - Update the information manually yourself.
 - Deny the requested change. Some circumstances that might result in denying the change include:
 - The data did not actually change (for example, the employee selected **Married**, but has a current status of **Married**).
 - The name change is from a formal name to a casual name. You may need to contact the employee to explain University policy on names and determine if the name should be added as a preferred name.
 - If a man is changing his name, you may need to contact the employee to confirm the legitimacy of the name change.
5. Select the appropriate option in the Administrator Actions box, and click the Save button.
6. Click OK to confirm that the save was successful.
7. When the verification window is displayed, click the [Go to Personal Data](#) link.

8. Verify that the change is displayed on the Personal Data page for the employee.

Important! *If the change is not visible on the Personal Data page, the change was probably effective-dated before the highest dated change already present in Personal Data. In this case, you will need to manually correct all rows dated since the Effective Date of the change.*

9. Close the Personal Data window, and click the [Worklist](#) link again to process the next change.

Updating Birthdate, SSN, and Citizenship

Follow these steps to update a person's birthdate, Social Security number (SSN), and citizenship on the Biographical Details page in the Modify a Person component. These changes do not require an effective date.



To update birthdate, SSN, and citizenship in Personal Data:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.




Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. To correct the *Birthdate*, type the new date in *mm/dd/yyyy* format, or click the Calendar button to select the date from a calendar page. Age does not recalculate until you leave the page and return




Note: For updates to the *Date of Death* field, see “Specifying Date of Death for a Terminated Employee” on page 221.

4. To correct a United States Social Security number, scroll down if necessary to see the National ID area. Type the number in the *National ID* field without dashes (for example, **222885555**).
5. In the *Citizenship/Passport* area.
 - a) To change a person's *US Citizenship Status*, click the down arrow and select an appropriate citizen status:
 - **Citizen**
 - **Alien Permanent** (resident alien with a green card)
 - **Alien Temporary/Intern(ational)** (non-resident alien on a visa)
 - **Not Indicated** (if unknown)

- b) To change the *Country of Citizenship* for a permanent or temporary alien, click the Lookup  button to look up and select the country. If not known, leave this field blank. (If you specify **Citizen**, the *Country of Citizenship* always defaults to **USA** when the record is saved, even if left blank.)



Note: Do not use the [Citizenship](#) link to update a person's passport data.

6. If there are no other personal data changes, click the Save  button to save your changes.

Specifying Date of Death for a Terminated Employee

Use this procedure to specify the date of death of a previously terminated employee.¹

PeopleSoft does not permit one employee termination record to be followed by another. If the employee has already been terminated on all employment records, you must enter the death directly on the Biographical Details page in the Modify a Person component.

How is date of death processed for a non-terminated employee?

When an active employee, on-leave employee, or retiree dies, a **Termination/DEA** record is entered in Job Data with the date of death (see “Processing a Job Termination, Retirement, or Death for a Regular Employee” on page 198). When the termination record is saved, PeopleSoft automatically inserts the *Date of Death* in the Biographical Details page.






To enter date of death for a terminated employee:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search  button. If both a **0** record and a **1** record are returned for the person, you can select either record.
3. In the Biographic Information area of the Biographical Details page, type the actual *Date of Death* (not the day after) in *mm/dd/yyyy* format, or click the Calendar  button to select the date from a calendar page.
4. If you have entered all the necessary personal data changes, click the Save  button.

1. This procedure is also described in “Processing a Death for a Terminated Employee” on page 205.

Updating Non-Campus Addresses and Contact Information

The procedure in this section describes how to access and change off-campus addresses of all types, including email addresses and phone numbers, on a person's Contact Information page.

Changing an Off-Campus Address

The addresses are effective-dated and stored by *Address Type*. For example, in addition to the home address, a person might have an alternate mailing address, a campus mailing address, and one or two office addresses.

Are you updating a campus mail address?

You cannot use this procedure to update an employee's campus mail address. The campus address is automatically populated based on the mail drop code specified in Job Data. To change a campus mail address, see "Changing the Campus Mail Address (Mail Drop)" on page 153.

Is the employee a former student?

If you are updating addresses for a new employee who is a former Princeton University student, make sure you *inactivate* the existing student Mailing Address (usually the address of the student's parents). Otherwise, the employee's home mailings will be sent to the old student address, instead of to the local home address.

<p>Note: Beginning in version 9 of PeopleSoft, most students' parents' addresses will be coded as Permanent Address and will not interfere with home mailings. However, some older records and those of graduate students will still have Mailing Addresses that need to be inactivated.</p>



To update addresses of all types:

1. Navigate to **Workforce Administration > Personal Information > Modify a Person**
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If you are correcting a previous error (for example, an incomplete zip code) select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, select the person you want by clicking any link in the row.
3. Click the **Contact Information** tab.
4. Locate the *Address Type* you want to change under Current Addresses.







Important! Never delete address types by clicking the Delete button on the *Current Addressses* page.

- If no other home address is available, change the home address to the campus department address, since an employee must always have a home address.
- If a mailing address is no longer valid, inactivate it (see “Inactivating an Address” on page 225).



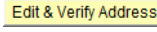

Note: You can only update **Home/Local** and **Mailing Address**. Other address types must be changed using the *Mail Drop* code (for **Campus Mail Address**) or Telephone Office (for **Office Location** addresses).

5. If you are adding a new address (you did *not* select () *Correct History* in Step 2), determine whether there is an existing address for the type you are adding (see Step 4). For example, if the person has moved and has a new home address, locate the row for the **Home/Local** address type.
 - If you *find* an existing address for the address type,
 - Click the [View Address Detail](#) link for the desired address type,

- Click the Add  button in the *Address History* area. (Existing address values will be carried over to the new row.)
 - If you **do not find** an existing address for the address type:
 - Click the Add  button at the end of any row in the Current Addresses area. (Address fields in the new row will be blank.)
 - Select the new *Address Type* from the drop-down list. Only available address types will be listed.
 - Click the [Add Address Detail](#) link.
6. In the *Address History* area, type the *Effective Date* of the new address in *mm/dd/yyyy* format (defaults to current date) or click the Calendar  button to select the date.
- a) Select the *Country* code using the Lookup  button.



Note: The Country code often comes up blank, but must be filled in before proceeding.

- b) Make sure the *Status* is **A**(ctive)
7. To enter a US or Canadian address:
- a) Click the [Update/View Address](#) link or the [Add Address](#) link and then click the Edit & Verify Address  button. Enter the street address and zip code that will be effective on the specified date.
- b) Click the Search  button. If the system finds a match, it displays the complete address on the Edit Address page. Click OK to return to the Address History page.

If the system doesn't find a match, you are given options appropriate to what it finds. They may include any of the following:


- [Use original search address](#) - to use the address you typed.
 - [Edit original search address and search again](#) - to change what you typed and search again.
 - [Display all potential matches](#) or [Display all street numbers](#) - to display information that may be used to complete the address.
 - [Accept recommended address](#) - to accept the address displayed by the system.
- c) When the address is displayed on the Edit Address page, you can override any of the values by clicking the [Override & Update Manually](#) link. This opens the fields so you can type the preferred value over the supplied value.

For addresses outside the US or Canada, click the [Update/View Address](#) link or the [Add Address](#) link, and then complete the fields on the Edit Address page.

8. When the address is correct, click OK to save the new local address and click OK again to return to the Contact Information page.



Note: You will not see the new address if it has a future effective date. To see both the current and the new address, click the [View Address Detail](#) link.

9. If there are no other address changes, click the Save  button.

Inactivating an Address


If a mailing address becomes invalid, and should no longer be used, add a new address row for the **Mailing Address** type, and set the status to **Inactive**. This is often necessary when hiring someone who was a student at Princeton, and may have a Mailing address that may contain his or her parents' address.





To inactivate an address:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. Click the **Contact Information** tab at the top of the page.
4. Locate the *Address Type* for the address that is no longer valid, usually **Mailing Address**.
5. Click the [View Address Detail](#) link to open the Address History page for the address type.

6. Click the Add Row  button. All the field values are carried over into the new row.
7. In the *Effective Date* field, enter the date when the address became or will become invalid, either typing the date in *m/d/yy* format or using the Calendar  button to locate the desired date.
8. In the *Status* field, type **I** or select **Inactive** using the Lookup  button.
9. Click the OK button to return to the Contact Information page. The *Status* for the address will be displayed as **I**.
10. Click the Save  button to save your changes.

Updating Off-Campus Phone Numbers

Follow these steps to update or correct a person's off-campus telephone number on the Contact Information page.



To update an off-campus phone number in Personal Data:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



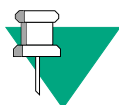
Tip! To search by first and last name, use the *Name* field for the first name and the *Last Name* field for the last name.

- b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. Click the **Contact Information** tab at the top of the page, and in the Phone Information area:



Note: Notice that campus phone numbers (Phone Type **Office Location 1**, **Voice Mail**, and **Fax**) cannot be updated. These numbers are updated automatically by the telephone system.

- To change an existing telephone number, locate the *Phone Type* and type over the *Telephone* number, as needed.
- To add one or more new telephone numbers:
 - Click the Add Row button to insert a new row,
 - In the *Phone Type* field, click the down arrow and select the type, such as **Home/Local** or **Mobile** (for cell phone numbers).



Note: Although they appear in the drop-down list, you cannot enter 2 or more phone numbers for the same phone type.

- Type the *Telephone* number in this format: 7775551212.
 - To delete an off-campus phone number, click the Delete button at the end of the row.
4. Click the Save button.

Updating Off-Campus E-Mail Addresses

Follow these steps to update or correct a person's off-campus e-mail address on the Contact Information page.




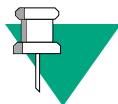
To update an off-campus email address in Personal Data:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.







Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. Click the **Contact Information** tab at the top of the page, and scroll down if necessary to see the Email Addresses area.



Note: Notice that the campus email address (identified with the *Email Type Campus*) cannot be updated. This address is updated automatically by another system.

4. In the Email Addresses area:
 - To change an existing off-campus e-mail address, locate the *Email Type* and type over the *Email Address*, as needed.
 - To add one or more new e-mail addresses:
 - a) Click the Add Row  button to insert a new row.
 - b) In the *Email Type* field, click the down  arrow and select the type, such as **Home**.
 - c) Type the *Email Address*.
 - To delete an existing e-mail address, click the Delete  button at the end of the row.
5. If you have entered all the necessary personal data changes, click the Save  button.

Changing Regional Data: Ethnicity/Race and Military Status

Follow these steps to update a person’s ethnic group and military status on the Regional page in the Modify a Person component.

Changing or Correcting the Ethnicity/Race

Changes to the ethnicity/race can include correcting an ethnicity/race, adding an additional ethnicity/race, and deleting an ethnicity/race. For HCM EEO purposes, you may only use the following codes from the Lookup list:

AMIND	American Indian/Alaska Native
ASIAN	Asian
BLACK	Black/African American
HISPA	Hispanic/Latino
PACIF	Native Hawaiian/Oth Pac Islander
WHITE	White
UNKNOWN	Unknown (if the employee has specifically chosen not to disclose ethnicity/race)

If the person is multi-ethnic, do not use the value **Multi** (multiracial), but specify one or more valid HCM values.



Note: The *Primary* checkbox () is selected by the system, and cannot be changed. If multiple races are selected, the system will add a new row for the **Multi** option and select that row as *Primary*, unless one of the selected options is the **Hispa** ethnicity. If **Hispa** is selected, it is checked as *Primary* regardless of any other races, including **Multi**.



To update ethnic group in Personal Data:

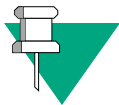
1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:

- a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



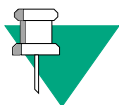
Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If you are correcting data, select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. Click the **Regional** tab.
 4. To change (correct) the person's *Ethnic Group*:
 - a) If multiple ethnicities/races have been specified, click the [View All](#) link to see them all on the same page, or scroll through the ethnicities using the Previous row and Next row arrows on the Ethnic Group navigation header.
 - b) When you find the ethnicity/race you need to change, use the Lookup button to locate and select the group.





Note: You may only use the **AMIND, ASIAN, BLACK, HISPA, PACIF, WHITE,** or **UNKNOWN** field values.

- c) The () *Primary* ethnicity is selected by the system, and you cannot change it.
5. To add another ethnicity/race:
 - a) Verify that the new ethnicity/race is not already there by clicking the [View All](#) link to see all existing ethnicity rows. If there is only one ethnicity currently entered, the link will be [View 1](#).
 - b) Click the Add Row button to add another row.
 - c) Use the Lookup button to locate and select the *Ethnic Group*.



Note: You may only use the **AMIND, ASIAN, BLACK, HISPA, PACIF, WHITE,** or **UNKNOWN** field values. You cannot use **UNKNOWN** except as a single, primary value.

Tip! The *Primary* ethnicity is selected by the system, and you cannot change it. If multiple ethnicities/races are selected, the system will add a new row for the **Multi** option and select that row as *Primary*. However, if the **Hispa** ethnicity is selected, it is checked as *Primary* regardless of any other ethnicities/races, including **Multi**.

6. To remove an ethnicity:
 - a) If you have not already done so, click the [View All](#) link to see all existing ethnicity rows.
 - b) Click the Delete Row  button for the ethnicity you want to remove.
 - c) If this row had been selected as the primary ethnicity, you will need to specify another ethnicity as the primary. Locate that row and select () *Primary*.
7. If you have entered all the necessary personal data changes, click the Save  button.

Updating Military Status

The military status can be found on the Regional tab, but if you need to enter a military discharge date, you'll need to navigate to the Military Discharge Dt page, under **Workforce Monitoring**.



To update military status:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.




Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.



- b) If you are correcting data, select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. To correct the person's *Military Status*:
 - a) Click the down arrow to select the status, such as **Active Reserve**.
 - b) If you are not sure which status to assign, check with your system manager.
 4. To change the *Military Status*, or add a new *Military Status*:
 - a) Click the Add Row button in the History section to add a new row.
 - b) In the *Effective Date* field, type the date when the new military status became or will become effective in *m/d/yy* format, or select the date using the Calendar button.
 - c) Select the *Military Status* from the drop-down list.
 5. If you have entered all the necessary personal data changes, click the Save button.

To enter the Military Discharge Date:

1. Navigate to **Workforce Monitoring > Meet Regulatory Rqmnts > Maintain Military Dischrg Date**.

2. On the Find page, type in the EmplID and click the Search  button, or click the [Advanced Search](#) link to search for the person by name. If multiple records are returned, click the link for the appropriate record.

Tip! *The EmplID will carry over from the Personal Data page, but may not from other pages.*

3. On the Milit Discharge Dt tab, enter the date in the *Military Discharge Date* field, either by typing the date in *m/d/yy* format, or by using the Calendar  button to select the date.
4. Click the Save  button to save the date.

Adding or Updating Emergency Contacts

Follow these steps to specify one or more persons to be contacted on behalf of the employee in case of an emergency. You can add, update, or delete emergency contacts on the Emergency Contact pages in Workforce Administration, under Personal Information.



Note: Though not required, it is highly recommended that an employee provide at least one emergency contact, preferably local or at least able to be reached within the United States.




To add, update, or delete an emergency contact:

1. Navigate to **Workforce Administration > Personal Information > Personal Relationships > Emergency Contact**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.




Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button. If multiple records are returned, select the person you want by clicking any link in the row.
3. On the Emergency Contact(s) page:
 - If this is the first emergency contact for the person, fill in the information in the blank fields on this page.
 - If you need to change an existing emergency contact and there is more than one contact for the person, use the navigation header bar  to locate the contact:




Tip! To view all the contacts on one page, click the [View All](#) link. Then you can scroll down the page to locate the contact.

- If there is already a contact and you are adding another contact for the person, click the Add  button to add a new row.




Note: If the existing contact is no longer valid, be sure to remove the row for that contact (see Step 10).

4. For *Contact Name*, type the name of the person to contact.
5. For *Relationship*, click the down  arrow and select the relationship of the contact to the employee, such as **Spouse**.
6. If this person is the primary emergency contact for the employee, select () *Primary Contact*.
7. If the contact has the *same* address as the employee, select () *Same Address as Employee*. If the contact has the *same* phone number as the employee, select () *Same Phone as Employee*. The home address and/or phone will default to the employee's home address and/or phone number.



Note: If the address or telephone displayed by default does not match information on the emergency contact form, check in Modify a Person to see whether the employee's home address and telephone should be updated.

8. If the contact has a *different* address and phone from the employee:
 - a) *Country* defaults to **USA**. If the only available contact is in another country, click the Lookup  button to look up and select the country.
 - b) Click the [Edit Address](#) link to add or change the address.









Note: The QuickAddress System (QAS) does not work for these pages, so you must enter the address.

- c) On the Edit Address page, type the first line of the street address in *Address 1*. As needed, continue the address in *Address 2* and *Address 3*.



Tip! Always spell out words (for example, specify “Street” not “St.”). An apartment or unit number should be entered on the Address 2 line.

- d) Enter the remaining address information, as required. For USA addresses, enter the *Postal* code and tab out. The *City*, *State*, and *County* fields will be filled in automatically, although you can change them if necessary.
 - e) Click OK to return to the Contact Address/Phone page.
 - f) In the Contact Phone area, type the contact's telephone number in the format 7775551212, in the *Phone* field.
9. To add or update additional phone numbers for the contact:
- a) Click the **Other Phone Numbers** tab.
 - b) For *Phone Type*, click the down  arrow and select the type, such as **Mobile**.
 - c) For *Phone*, type the number in this format: 7775551212.
 - d) To add another number, click the Add  button and specify the phone type and number in the new row.
 - e) To delete a number, click the Delete  button.
10. To **remove** an existing contact that is no longer valid:
- a) Either use the header bar arrows, or scroll to locate the invalid emergency contact.
 - b) Click the Delete  button next to the emergency contact's name.
 - c) When the confirm message is displayed, click .
11. Click the Save  button when you have completed your changes.

Entering a Preferred Name

You can add or update a preferred name, such as a professional name used in addition to the legal name (see “Adding or Updating a Preferred Name” on page 237). If a preferred name was entered incorrectly, you can correct the name without adding a new effective-dated row, provided that you are in Correct History mode (see “Correcting a Preferred Name” on page 239).

In addition, you can enter a preferred name that includes special characters (see “Entering an Accent or Special Character in a Name” on page 241).

When a Person Uses Only One Name

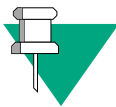
Occasionally, a person uses only one name as both given and surname. Since a first and last name are required by both IRS and the University’s benefits carriers, you must enter the same name in both the *First Name* and *Last Name* fields, when entering the Primary Name for such a person. However, in the Preferred Name, you can enter the single name as the *Last Name*, and enter a period (.) in the *First Name* field (because PeopleSoft requires at least one character in this field).

Note: Confirm that the person has only one name, and that this is the person’s legal name. If the single name is not their legal name, they can still enter it as their preferred name, as described above.

Adding or Updating a Preferred Name

Follow these steps to specify a preferred name for a person on the Additional Names page in the Biographical folder under Personal Information on the Workforce Administration menu.

A *preferred name* is a name other than the employee’s legal name, for example, a name used only for professional purposes. The name can include special characters (see “Entering an Accent or Special Character in a Name” on page 241).



Note: A preferred name, if specified, is used by default instead of the primary name for Princeton’s online directory and Faculty Facebook.

If a person has changed their preferred name, add an effective-dated row, as described in the procedure below. If a person's name was entered incorrectly, follow the procedure in "Correcting a Preferred Name" on page 239 to correct the name.



To add or update a preferred name for an employee:

1. Navigate to **Workforce Administration > Personal Information > Biographical > Additional Names**.
2. On the Find page:
 - a) Type the *EmplID*, or click the [Advanced Search](#) link to search by name.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. Determine whether there is an existing name with the name type **Preferred**:
 - If you **do not find** an existing preferred name:
 - Click the Add button at the end of any existing name row. (Fields in the new row will be blank.)
 - Type or select **Preferred** in the *Type of Name* field.
 - Click the [Add Name Data](#) link.
 - If you **find** an existing preferred name, click the [View Name History](#) link and continue with Step 4 to add a new effective-dated row for the preferred name.



Tip! If the link is [Edit Name History](#), you are in *Correct History mode*.

4. On the *Name History* page, type the *Effective Date* in *mm/dd/yyyy* format (defaults to current date) or click the Calendar button to select the date.
5. Make sure *Format Using* is **English** (default).
6. Click the [Edit Name](#) link.
7. On the *Edit Name* page, specify the preferred name:



Tip! The name can include punctuation such as an apostrophe (O'Connor) or hyphen (Jones-Martin), but not a comma. If the name contains an accent mark, see "Entering an Accent or Special Character in a Name" on page 241.

- a) Leave the *Prefix* field blank.
- b) Type the preferred *First Name*.

Tip! If the person has indicated that they use only one name, enter a period (.) in the *First Name* field, and enter the single name in the *Last Name* field.

- c) If given, type the preferred *Middle Name*, or a middle initial with punctuation (for example, **P.**).
 - d) Type the preferred *Last Name* (without a suffix).
 - e) If given, type the preferred name *Suffix*, (for example, **Jr., Sr., III**) or click the down arrow to select a suffix.
 - f) If desired, click the Refresh Name button to see the name.
 - g) Click OK to return to the Name History page. Click OK again to return to the Names Other page.
8. Click the Save button to save the preferred name. The top-of-stack name will be displayed.

Correcting a Preferred Name

When you need to correct an error in an existing preferred name, you must be in Correct History mode. You can select *Correct History* from the Search page, or you can click the Correct History button on the Additional Names page.


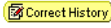


To correct a preferred name:


1. Navigate to **Workforce Administration > Personal Information > Biographical > Additional Names**.
2. On the Find page, type the *EmplID*, or click the [Advanced Search](#) link to search by name.



Tip! To search by first and last name, enter all or part of the first name in the *Name* field and the last name in the *Last Name* field.

3. If you are correcting a previous error (for example, a misspelled name) select *Correct History*.
4. Click the Search  button. If multiple records are returned, click the link to the appropriate record.
5. On the Names Other page, find the preferred name you are looking for.
6. Click the [Edit Name History](#) link. (If the link is [View Name History](#), you are not in Correct History mode. To correct the name, click the Correct History  button at the bottom right of the page.)
7. Click the [Edit Name](#) link on the Name History page.
8. Type the correct name in the fields, as needed.

Tip! *If the person has indicated that they use only one name, enter a period (.) in the First Name field, and enter the single name in the Last Name field.*

9. Click OK to return to the Name History page, and click OK again to return to the Names Other page.
10. Click the Save  button to save the correction.

Entering an Accent or Special Character in a Name

There are two methods you can use to locate and enter an accent character (such as é) or any other special character (for example, å) in a person's name, one uses Microsoft Word and the other uses the Windows Character map system tool.



Important! Only use the **Preferred** name type (see “Adding or Updating a Preferred Name” on page 237) to specify special characters in a name. The **Primary** name cannot include special characters because of processing requirements of systems that interface with HCM, such as the federal government.



Note: Some special characters will not work in PeopleSoft. If you encounter such a character, note it and keep it aside for manual entry into other systems that may need it. Also, be aware that some characters, especially on the first letter, will cause problems with alphabetizing and some search engines.

To enter an accent or special character using Word:

1. Follow the steps in “Adding or Updating a Preferred Name” on page 237, to display and enter the person's name on the Edit Names page.
2. When you get to the point where the special character should be inserted:
 - a) Open Microsoft Word and, in a blank document, select **Insert, Symbol** from the menu.
 - b) If necessary, select **Times New Roman** from the *Font* drop-down list.
 - c) Locate the character you need and click on it to select it.
 - d) Click the Insert button, and then click Close to close the Symbol window.
 - e) Select the character by highlighting it, and copy it (using the Ctrl + C keys or any other method).

3. On the Edit Names page, place the cursor where you want the special character, right click on the mouse, and select **Paste** from the shortcut menu to insert the special character. If a question mark appears instead of the character you selected, try another font, such as **Arial**, in Word's symbol window.



Note: Accents should only be added to the Preferred Name, not the Primary Name because not all systems that interface with PeopleSoft (IRS, benefits carriers, other campus systems, etc.) accept special accented characters in names. The Preferred Name is used by the *University Register*, the online directory, and the COEUS system.

4. Finish entering the name and save the record.



To enter an accent or special character using the character map:

1. Follow the steps in “Adding or Updating a Preferred Name” on page 237, to display and enter the person’s name on the Edit Names page.
2. When you get to the point where the special character should be inserted:
 - a) In Windows, select **Start > Programs > Accessories > System Tools > Character Map**. The Character Map application window is displayed.
 - b) Select **Times New Roman** from the *Font* drop-down list.

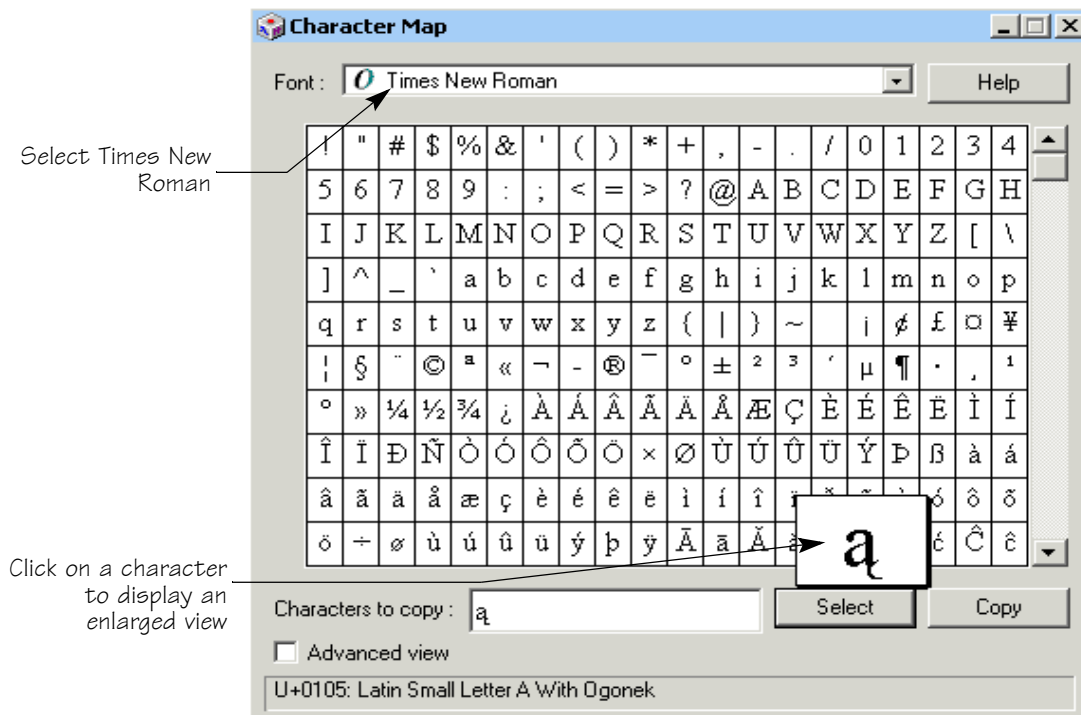


Figure 1: Character Map Window

- c) Click on the character that you need for the person’s name. The character is displayed in an enlarged view.
- d) Click the Select button when the desired character is enlarged. The character appears in the *Characters to copy* field.
- e) Click the Copy button.



Tip! If you had already selected a different character, delete it from the *Characters to copy* field before clicking the Copy button.

3. Back on the Edit Names page, place your cursor where you want the special character, and select **Paste** from the shortcut menu to insert the accent mark or special character. If you get a question mark (?) instead of the character you selected, you can try another font, such as **Arial**, in Character Map.



Note: Accents should only be added to the Preferred Name, not the Primary Name because not all systems that interface with PeopleSoft (IRS, benefits carriers, other campus systems, etc.) accept special accented characters in names. The Preferred Name is used by the *University Register*, the online directory, and the COEUS system.

4. Finish entering the name and save the record.

Maintaining Faculty Committees



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<i>Changing the Status of a Faculty Committee</i>	248
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Faculty Committees

Use the procedures in this section to maintain faculty committees and track committee membership for faculty members.

When a committee is created, you must add a PeopleSoft record for the committee and identify all the committee's members. After annual elections are held, new members are voted into committees, and you will need to update the memberships. In time, you may also need to change the status of a committee, for example, to deactivate it.

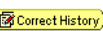
The following procedures are used to maintain committee records:

- “Adding a New Faculty Committee” on page 247
- “Changing the Status of a Faculty Committee” on page 248
- “Changing the Name of a Faculty Committee” on page 249
- “Adding or Updating Faculty Committee Members” on page 250
- “Deleting a Committee Member Before Service Starts” on page 252
- “Updating a Committee Member’s Service End Date” on page 253

At any time, you can view a summary of a faculty member’s committee memberships. See:

- “Viewing Faculty Committee Memberships” on page 254



Tip! You must always be in Correction mode to update committees or committee members. If you did not select () Correct History on the Find page, you can click the Correct History  button on the Committees or Committee Members page, and click No to return to the record in Correction mode.

Maintaining Committees




Maintaining faculty committees includes adding a new committee, changing the status of an existing committee, or changing the name of an existing committee. For information on adding or removing faculty members from a committee, see

Adding a New Faculty Committee

Follow these steps to add a new faculty committee.



To add a new committee:

1. Select **Workforce Development > Faculty Events > Define Faculty Events Data > Committees**.
2. On the Find page:
 - a) Click the [Add a New Value](#) link.
 - b) On the Add page, type a code that will identify the committee in the *Committee* field (may be up to 6 characters, but is normally 4 characters or less).
 - c) Click the Add  button.
3. On the Committee page, the *Effective Date* defaults to today's date. If this is not the date the committee is activated, type the activation date in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
4. In the *Status* field, select **Active** (default).
5. In the *Committee Name* field, type the full name of the committee (up to 30 characters).
6. In the *Committee Type* field, type **PUDOF**.
7. In the *Description* field, type a description to help identify the committee. The description should match the *Committee Name*, or be the full, expanded formal name if that name did not fit in the *Committee Name* field.
8. Click the Save  button.

Related Procedure:

- To add the committee members, see “Adding or Updating Faculty Committee Members” on page 250.

Changing the Status of a Faculty Committee

Follow these steps to inactivate or reactivate a faculty committee by changing the status from active to inactive, or from inactive to active.



Note: Never delete a committee, because this might delete links to past members. Instead, change the status of the committee to **Inactive** (see “Changing the Status of a Faculty Committee” on page 248).



To change the status of a faculty committee:

1. Select **Workforce Development > Faculty Events > Define Faculty Events Data > Committees**.
2. On the Find page:
 - a) Type the *Committee Code*, or type a search value in the *Description* or *Committee Type* fields.
 - b) Select *Correct History*.
 - c) Click the Search button.
 - d) Select the committee from the search results list by clicking on any link in the row.
3. On the Committee page, click the Add button to add a new row for the status change.
4. The *Effective Date* defaults to today’s date. If this is not the date the committee status changed, type the activation date in *mm/dd/yyyy* format, or click the Calendar button to select the date.
5. In the *Status* field, click the down arrow and select **Inactive** to inactivate the committee, or **Active** to activate it.
6. Click the Save button.

Changing the Name of a Faculty Committee



If a faculty committee has been substantially reorganized, you may need to create a new committee, and close the old one. To close a committee that has been substantially reorganized, you first change the existing committee name to indicate the closed status.

Note: You should never inactivate the old committee, because then the membership records for that committee will not show up in search results.

Follow these steps to change the name of a faculty committee.



To change the name of a faculty committee:

1. Select **Workforce Development > Faculty Events > Define Faculty Events Data > Committees**.
2. On the Find page:
 - a) Type the *Committee Code*, or type a search value in the *Description* or *Committee Type* fields.
 - b) Select *Correct History*.
 - c) Click the Search  button.
 - d) Select the committee from the search results list by clicking on any link in the row.
3. In the *Committee Name* field, type the new name of the committee (up to 30 characters), ending with **(Closed)**.
4. In the *Description* field, modify the description to indicate that it is closed. The description should match the *Committee Name* or be the full, expanded, formal name if that didn't fit in the *Committee Name* field, ending with **(Closed)**.
5. Click the Save  button.
6. Add the new committee name as described in “Adding a New Faculty Committee” on page 247.

Maintaining Committee Memberships

This section explains how to add faculty members to a committee, delete a committee member before they begin to serve on the committee, and update a committee member's service end date.

Adding or Updating Faculty Committee Members

Follow these steps to add members to a new faculty committee, and to define a member's role and term of service on the committee. As new members are added to the committee, you can follow the same procedure to add the new members.

Multiple Memberships and Roles


A person can be listed as a committee member multiple times, with a new row for each non-concurrent role or term of service. If a committee member's role changes, add a new row for the committee member, with the start and end dates for the member's service in the new role. You might also need to change the end date of the original role entry for the committee member, if the person is reappointed to a concurrent term (with no break in service).




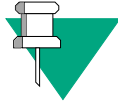
To add or update faculty committee members:

1. Select **Workforce Development > Faculty Events > Define Faculty Events Data > Committees**.
2. On the Find page:
 - a) Type the *Committee Code*, or type a search value in the *Description* or *Committee Type* fields.
 - b) Select () *Correct History*.
 - c) Click the Search button.
 - d) Select the committee from the search results list by clicking on any link in the row.
3. On the Committee page, click the **Committee Members** tab.
4. On the Committee Members page, click the Add button in the Member Information section to insert a new row (if needed):






Tip! The *Committee Member Number* is incremented each time you click the Add  button.

5. In the *EmplID* field, type the faculty member's employee ID, if you know it, or use the Lookup  button to locate the employee.



Note: An individual can be listed multiple times on a committee if they served non-concurrent terms (with a break between the terms).

6. In the *Role* field, select **Chair** if the faculty member will chair the committee, or **Member** for all other committee members.
7. In the *Start Date* field, type the date when the faculty member's term on the committee starts, in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
8. The *End Date* defaults to one year after the *Start Date*. If the faculty member's term on the committee is longer or shorter than one year, type the correct end date in the *End Date* field, in *mm/dd/yyyy* format, or click the Calendar  button to select the date.
9. To add another committee member to the same committee, repeat Step 4 through Step 8.
10. When all the committee members have been added, click the Save  button.

Deleting a Committee Member Before Service Starts

Follow these steps to delete a faculty committee member, before the person's term of service begins. For example, the person might decide not to serve on the committee, or might be unable to start service.



To delete a faculty committee member:



1. Select **Workforce Development > Faculty Events > Define Faculty Events Data > Committees**.
2. On the Find page:
 - a) Type the *Committee Code*, or type a search value in the *Description* or *Committee Type* fields.
 - b) Select () *Correct History*.
 - c) Click the Search button.
 - d) Select the committee from the search results list by clicking on any link in the row.
3. On the Committee page, click the **Committee Members** tab.
4. On the Committee Members page, use the *Member Information* header bar arrows to view the committee members one by one, or click the [View All](#) link to display all the members on one page. Locate the member you want to delete.
5. Click on the Delete Row button in the Member Information section to remove the member.
6. When your changes to the committee members are complete, click the Save button.

Updating a Committee Member's Service End Date

Follow these steps to update the end date of a faculty member's term of service on a committee, when the member resigns after the term begins, or does not serve for the entire term.



To revise a faculty committee member's term:

1. Select **Workforce Development > Faculty Events > Define Faculty Events Data > Committees**.
2. On the Find page:
 - a) Type the *Committee Code*, or type a search value in the *Description* or *Committee Type* fields.
 - b) Select () *Correct History*.
 - c) Click the Search  button.
 - d) Select the committee from the search results list by clicking on any link in the row.
3. On the Committee page, click the **Committee Members** tab.
4. On the Committee Members page, use the *Member Information* header bar arrows to view the committee members one by one, or click the [View All](#) link to display all the members on one page. Locate the member you want to revise.
5. Select a new *Start Date* or *End Date*, as needed.
6. When your changes to the committee members are complete, click the Save  button.

Viewing Faculty Committee Memberships

Follow these steps to view all of an individual employee's current and past memberships on faculty committees.



Tip! Other reports regarding faculty and committees are available in the Information Warehouse, in either the Committee on Committees package or the HR Reports/DOF package. See your systems manager about gaining access and using these reports.



To view a summary report on an individual's committee memberships:

1. Select **Workforce Development > Faculty Events > Track Events > Review Committee Memberships**.
2. On the Find page:
 - a) Type the *EmplID*, or type a full or partial value in the *Name* or *Last Name* field.
 - b) Click the Search button. If multiple records are returned, select the appropriate record by clicking on any link in the row.
3. On the Employee Committees page:
 - Committees are displayed one after another on the page, starting with the first committee the person was assigned to, and ending with the most recent assignment.
 - By default, the committees are displayed in pairs. Use the arrows in the navigation header to scroll through the committees, or click the [View All](#) link to display all the committees on one page.
4. Use the header bar arrows to view the committees one by one, or click the [View All](#) link to display all the committees on one page.

Special Corrections in Job Data



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Miscellaneous Corrections and Deletions

The procedures in this section describe how to make special corrections and updates to Job Data in Workforce Administration. Other corrections are described in the following sections:

- “Changing an Original Hire Date” on page 260
- “No-Shows” on page 268
- “Auditing Job Data Changes” on page 271
- “Updating Table Data” on page 274

When do you need correction mode authorization?

If you are correcting or deleting a historical row in the Job Data record (a row with an effective date earlier than today’s date) you must be authorized to access Job Data in *correction mode*. (To access correction mode, you click the *Correction History* checkmark box on the Find page.)

If you are correcting or updating information on a future-dated row in Job Data, correction mode is not required. Any staff member who updates HCM records can make changes to or delete future-dated rows.

Because correction mode is powerful and can lead to fatal errors, only experienced data entry staff are permitted to access Job Data in this mode. Make sure you have authorization from the systems manager in the Dean of Faculty (DOF) office before you use these procedures to change historical data.

Correcting Data Errors in Fields

Follow these general steps to correct miscellaneous field data errors on the Job Data pages.

You Can Make Some Changes Without Using Correction Mode

If you do not have permission to use correction mode, you can make temporary changes to the employee's department, job code, or salary information by adding a new effective-dated row and specifying **Data Change**. See "Temporarily Changing Dept, Job Code, or Salary Data" on page 157.



To correct data in Job Data:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If the *Effective Date* of the data you are changing is earlier than today's date, select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. Correct fields as appropriate on the Job Data pages. For example, to correct a job code, click the **Job Information** tab and specify the correct code in the *Job Code* field.




Important! Unless you are changing the *Hire Date*, it is not recommended that you correct the *Effective Date*. Instead, you should delete the incorrectly dated *Job* row and re-enter it as a clean new row with the correct *Effective Date*.



Note: If you are correcting (deleting and re-adding) the Effective Date of a Job row, and there is a Job Note attached to that former effective date, you must re-add the Job Note to associate it with the effective date of the new Job row.



Tip! *If you are making a correction that requires you to delete a Job row with a Job Note and re-add it, and the new Job Row has the same Effective Date as the old one, the Job Note will reattach itself to the new job and Eff Seq of that Job row.*

4. If your corrections or deletions will affect subsequent rows in the employee's Job Data record, correct fields in other rows as needed.
5. Click the Save  button to save your corrections.

Deleting Rows

Follow these general steps to delete a row on the Job Data pages.



To delete a row in Job Data:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) If the *Effective Date* of the row(s) you are deleting is earlier than today's date, select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. To delete a row:
 - a) Use the header bar arrows to locate the row you need to delete.
 - b) Click the Delete button to delete the row.
 - c) Click the OK button to confirm your delete.
4. If your deletion will affect subsequent rows in the employee's Job Data record, correct fields in other rows as needed. For example, if you delete a **Leave of Absence** row, you must delete any subsequent **Return from Leave** row.
5. Click the Save button to save your changes.

Changing an Original Hire Date

The *hire date* is the effective date entered in PeopleSoft in the **Hire/Regular Staff** row of the employee's primary record **0**. The procedures in this section describe how to change an original hire date, for example, when the date is entered incorrectly, or when the employee is unable to start work on the originally scheduled hire date.

Because it is a critical factor in calculating wages and benefits, the hire date appears in many places in the employee's PeopleSoft record. When you change the original hire date in the employee's **Hire/Regular Staff** row on the Work Location page in Job Data, PeopleSoft automatically updates the related date fields in that row. For other rows and fields, however, you must manually change the hire date.

Overview of the Hire Date Correction Process

Correcting a hire date is a multi-step process that includes changing all the occurrences of the effective hire date in the employee's PeopleSoft records. The parts of this process are:

1. Correcting the Employee's Records

You must correct all occurrences of the hire date in the employee's record (see "Correcting the Hire Date in the Employee's Records" on page 261). You will:

- Correct all hire and entry dates in Job Data page 261
- Verify/correct the dates in Personal Data page 262
- As needed, verify/correct the dates in I-9 Data page 267

Correcting the Hire Date in the Employee's Records

For a new Dean of Faculty (DOF) employee, use the procedures in this section to correct all the occurrences of the effective hire date in the employee's PeopleSoft record. You must:

- Verify/correct the dates in Personal Data page 262.
- Correct all hire and entry dates in Job Data page 263.
- As needed, verify/correct the dates in I-9 Data page 267.

Are you moving back the hire date?

You may also need to change the Effective Date on the Person record, if the new hire date is earlier than the Recommendation and Person entry. See "Verifying and Correcting Dates on the Person Record" on page 261.

Are you correcting a rehire date?

Use the procedures in this section only to correct the effective date of a *new hire*. To correct the effective date of a rehire, you must delete the incorrect **Rehire** row in Job Data, then add a new row and reenter the rehire data (see the appropriate rehire procedure in "Hiring" on page 1).






Tip! If you are changing the hire or rehire date to an earlier date, email the HR Data Management group (Lynne Voigstberger, Pete Cassaday, and Lillian Laney), requesting them to run the Primary Flag Update Reset process.

Verifying and Correcting Dates on the Person Record

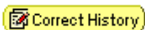
If the effective date on the Person record is not earlier than the new hire date, you will not be able to change the date on the Job Data record. Therefore, you must verify that the Person record is dated early enough to change the hire date. Otherwise, you must correct the effective date on the Person record before changing the date of hire.





To verify/correct the dates in Personal Data when moving the hire date to an earlier date:

1. Select **Workforce Administration > Personal Information > Modify a Person**.
2. On the Find page:
 - a) If necessary, type the *EmplID*, or *Name* and *Last Name*.
 - b) Select *Correct History*.
 - c) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. On the Biographical Details page, if the date in the *Effective Date* field under Biographical History is *later* than the revised hire date:
 - a) If there are multiple name rows for this person, use the arrows in the navigation header to locate the first row.
 - b) Change the *Effective Date* in the Name section to a date that matches the new hire date. Either type the revised hire date, or click the Calendar  button to select the date.
 - c) If necessary, scroll forward through the Name rows, and also change any other *Effective Dates* that are later than the new hire date.
 - d) If there are multiple Biographical Details rows for this person, use the arrows in the navigation header to locate the first row.
 - e) Change the *Effective Date* in the Biographical Details section to a date that matches the new hire date. Either type the revised hire date, or click the Calendar  button to select the date.
4. Click the **Contact Information** tab, and scroll to the first row, if necessary. Change the effective date of the home/local address and any other non-campus addresses that should be effective as of the hire date:
 - a) Click the [Edit/View Address Detail](#) link.



Tip! If the link is [View Address Detail](#), you need to click the Correct History  button at the bottom of the page.

- b) In the *Effective Date* field, type the correct date or select it using the Calendar  button.

5. Click the **Regional** tab, scroll to the first row, if necessary, and change the *Effective Date* under the History header.
6. Click the Save  button to save your changes.

Correcting Hire and Entry Dates in Job Data

If there are multiple records, keep in mind that changing the hire date on the **0** record might also affect the **1** record for an employee with a secondary position. If a person has both a **0** and a **1** record with the same hire date, you must correct the hire date on both records.

If there are other Job Data rows for the employee and you are moving the hire date forward, check the effective dates of the other rows before you continue. If the effective date on another row is earlier than the revised hire date, change the effective date on the other row(s) before you change the effective date in the hire row.




To correct all hire and entry dates in Job Data when changing the hire date to either an earlier or later date:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or type all or part of the name in the *Name* and *Last Name* fields.



Tip! To search by first and last name, enter the first three characters of the first name in the *Name* field and the last name in the *Last Name* field.

- b) Select () *Correct History*.
- c) Click the Search  button. If multiple records are returned, click the link to the appropriate record.



Important! If there are multiple records, keep in mind that changing the hire date on the **0** record might also affect the **1** record for an employee with a secondary position. If a person has both a **0** and a **1** record with the **same** hire date, you must correct the hire date on both records.



3. On the Work Location page:

- a) As needed, use the header bar arrows to locate the row with the employee's hire record (*Action Hire* and *Reason Regular Staff*).




Important! If a Job Note was added to this person's record with the old hire date, you must first delete the current Job Note, then change the Effective Date to the new hire date and readd the Job Note. You cannot correct Job Note effective dates.

You must delete the Job Note first, before changing the Hire Date, because the Job Note will become "orphaned" otherwise, and you will not be able to delete it. Your system administrator will need to run a special process to delete the "orphaned" note.

- b) In the **Hire/Regular Staff** row, type the revised *Effective Date* of the hire in *mm/dd/yyyy* format, or click the Calendar  button to select the date from a calendar page. As needed, click the OK  button to clear warning messages such as **Date out of range** or **Adjust Benefit Program participation date**.



Important! When you change the *Effective Date* of the **Hire/Regular Staff** row in the employee's Job Data, various entry date fields in the hire row are automatically updated to match the new effective date. If there are other Job Data rows for this employee, you must manually update the date fields in those rows (you will do this in Step 7).




- c) If specified, check to see if the *Expected Job End Date* should also be changed. As needed, type or select the revised date.
 - d) Make sure *Department Entry Date* matches the revised hire date.
4. Click the **Job Information** tab. On the Job Information page, make sure *Entry Date* matches the revised hire date.
 5. Click the **Salary Plan** tab. On the Salary Plan page:
 - a) Make sure *Grade* is specified. If blank, click the Lookup  button to look up and select the employee's salary grade.
 - b) Make sure the *Grade Entry Date* matches the revised hire date. As needed, type the date in *mm/dd/yyyy* format.
 6. Click the [Benefits Program Participation](#) link at the bottom of the page. On the Benefit Program Participation page:

- a) Make sure *Effective Date* (displayed under the *Benefit Program Participation* header) matches the revised hire date. If not, type or select the new date.
- b) If there are more rows than one, delete the incorrect Benefit Program Participation row:



Tip! Because the **0** record is used to administer benefits, you can skip this substep if you are correcting a hire date on record **1** for a benefits-eligible employee.

- Use the arrows in the *Benefit Program Participation* header bar to locate the hire row with the *incorrect* hire date.
 - Click the Delete button to delete the row. Click the OK button to confirm your delete.
7. Return to the Job Data pages by clicking the [Job Data](#) link at the bottom of the page. *If there is more than one effective-dated row for this employee* (such as a **Mail Drop** change) use the header bar arrows to display one of the other rows.
 - a) Click the **Work Location** tab. On the Work Location page:
 - Make sure the *Effective Date* of this row is the same as or later than the revised date on the **Hire/Regular Staff** row. If earlier, change to match the revised hire date.
 - Change *Department Entry Date* to the revised hire date.
 - b) Click the **Job Information** tab. On the Job Information page:
 - Change *Entry Date* to the revised hire date.
 - As needed, change the *Expected Job End Date*.
 - c) Click the **Salary Plan** tab and change *Grade Entry Date* to the revised hire date.
 - d) Repeat this step for each of the other rows.
 8. Click the [Employment Data](#) link at the bottom of the page. On the Employment Information page:
 - a) Click the *Override* checkbox next to the *Original Start Date* at the top of the Organizational Instance area. This opens the Original Start Date field for correction.
 - b) Type the revised hire date, or use the button to select the date.
 - c) For DOF employees, the *Company Seniority Date* field will be recalculated later through a batch process.

- d) Click the *Override* checkbox next to the *Benefits Service Date* field. Then type the revised hire date in *mm/dd/yyyy* format, or click the Calendar  button to select the date in the *Benefits Service Date* field. The system automatically recalculates and displays the time of service (*Years Months Days*).
 - e) Click the Save  button. When the record has been saved successfully, deselect () the *Override* checkboxes for *Original Start Date* and *Benefits Service Date*.
9. Click the Save  button to save the Job Data record.

Related Procedures:

If changing a hire date to an earlier date, email Lynn Voigtsberger, Peter Cassaday, and Lillian Laney, so they can run the process to update the Primary Flags Maintenance page with the new date.

**To verify/correct the effective date in I-9 Data:**

1. Select **Workforce Administration > Job Information > Princeton Data > I9 Data**.
2. On the Find page:
 - a) As needed, type the *EmplID* or *Name* and *Last Name*.
 - b) Select () *Correct History*.
 - c) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. On the I-9 Data page:
 - a) If there is only one row with status **No I-9**, make sure the *Effective Date* has been reset to the revised hire date.
 - b) If there are multiple rows:
 - For a **Valid (ok to pay)** or **Not Required (ok to pay)** row, correct the *Effective Date* to the revised hire date.
 - If there are multiple **No I-9** rows, check with your system manager to determine how to reconcile the effective dates.
 - c) If you have made corrections, click the Save button.

No-Shows

On occasion, a person accepts a hire offer, but later decides to decline the offer, or is for some reason unable to start work as anticipated. In this case, the person is considered a *no-show*.

The procedures in this section describe how to update the Job Data record for a no-show, including:

- “Canceling a Hire for a No-Show” on page 268
- “Reactivating a Hire for a No-Show” on page 270

Canceling a Hire for a No-Show

Follow these steps when you have entered a hire record for a new employee in the PeopleSoft system, but the person does not start work after all (is a no-show). Because you cannot delete a **Hire/Regular Staff** row after it has been added to the system, you will create a new row that cancels the hire.



To cancel a hire for a no-show:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or use the *Name* and *Last Name* fields to search by name.
 - b) Click the Search button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page:
 - a) As needed, use the header bar arrows to locate the row with the no-show's hire record (*Action Hire* and *Reason Regular Staff*). Write down the hire row's *Effective Date*.
 - b) Delete any Job Data rows with dates later than the **Hire** row.
 - c) Click the Add button to add a new row to the record.
 - d) For *Effective Date*, specify the same effective date as the hire row. Either type the date in *mm/dd/yyyy* format, or click the Calendar button to select the date from a calendar page. As needed, click the OK button to clear the warning message **Date out of range**.

- e) For *Effective Sequence*, type a number one higher than the sequence number on the hire row. For example, if the hire row sequence is number is **0**, type **1**.
 - f) For *Action* (first box after *Action/Reason*) click the down arrow and select **Termination**.
 - g) For *Reason* (second box after *Action/Reason*) type **CAN**, or select **Cancel** from the drop-down list.
4. Click the [Employment Data](#) link at the bottom of the page. On the Employment Information page:
- a) In the Organizational Instance section, select () *Override*, next to the *Original Start Date* field to open it.
 - b) Clear the date and press the Tab key.
 - c) In the Organizational Assignment Data section, select () *Override*, next to the *Benefits Service Date* field.
 - d) Clear the *Benefits Service Date* field and press the Tab key (*Years Months Days* are automatically reset to **0**).



Tip! The *Override* checkboxes must remain selected () so that the dates will remain blank.






5. Click the Save button. As needed, click the OK button to clear any warning messages.

Reactivating a Hire for a No-Show

Follow these steps when you have canceled the original hire record for a person who was a no-show, but that person is later employed in the same job. To reactivate the hire, you will delete the row you previously created to cancel the hire.



To reactivate a hire for a no-show:

1. Select **Workforce Administration > Job Information > Job Data**.
2. On the Find page:
 - a) Type the *EmplID*, or use the *Name* and *Last Name* fields to search by name.
 - b) Select *Correct History*.
 - c) Click the Search  button. If multiple records are returned, click the link to the appropriate record.
3. On the Work Location page:
 - a) As needed, use the header bar arrows to locate the row with the no-show's termination record (*Action* **Termination** and *Reason* **CAN**).
 - b) Click the Delete  button to delete the row. Click the OK  button to confirm your delete.
4. Click the Employment Data link at the bottom of the page. On the Employment Information page:
 - a) Enter the new hire date in the *Original Start Date* field.
 - b) Enter the new hire date in the *Benefits Service Date* field.
 - c) Click the Save  button.
 - d) Unclick the *Override* checkboxes.
5. Click the Save  button.

Auditing Job Data Changes

Follow these steps to review dates and types of changes in Job Data.



To audit changes in an employee's Job Data record:

1. Select **Workforce Administration > Job Information > Princeton Data > Job Audit**.
2. On the Find page, type the *EmplID* and click the Search button. If multiple records are returned, click the link to the appropriate record.
3. On the Pu Job Audit page:



Important! The Job Audit trail is view-only. Do not attempt to use the Save button on this page.

- In the header bar at the top of the page, use the left and right arrows in the header bar to find a row:

View All First ◀ 2 of 4 ▶ Last



Tip! To view all the rows in Job Data on one page, click the [View All](#) link. This way, you can scroll down the page to audit the row changes.

- For specific details about the changes to a row, locate the third line starting with *Action Date*. This line includes the following audit information:
 - *Action Date* (the date the change was made)
 - *Audit Stamp* (date and time of the change)
 - *User ID* (the ID of the person who made the change)
 - Whether the change was an update (**U**), a delete (**D**), or an add (**A**).
 - Status of the row, either **NEW** or **OLD**.
- Subsequent lines display the job data values in the row.




Note: If the *Actual Date* for a row is prior to 06/09/2001, the audit fields will be blank. Except for the active history rows, earlier audit information was not saved when the Tesseract system was converted to PeopleSoft V7.6 on 06/09/2001.

Rerunning the Daily Audit Reports

You can use the process described below to rerun any of the daily audit reports that may have failed due to printer or other technical problems.

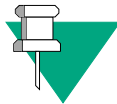
To rerun daily audit reports:

1. Navigate to **Set Up HRMS > Product Related > Workforce Administration > Princeton Setup > Princeton Process Table**.
2. Under *Daily Turnaround Reports Date*, write down the date and time stamp and hold aside.
3. Set date back to prior day or to the day you need (reports will be run for all days following the date you specify).
4. Click the Save  button.
5. Navigate to **Workforce Administration > Princeton Reports > HR Daily Turnaround**.
6. Choose or add a **Run Control** (typically, your initials).
7. Indicate the *Business Unit* (PUDOF)
8. Click the Run button.
9. To send the report directly to the printer:
 - a) Select the following parameters:
 - Server = **PSUNX**
 - Type = **Printer**
 - Format = **HP**
 - Output Destination = **hp_nassau_9** or **u:hp_nassau_9**
 - b) Choose the reports you want to run. You may select multiple reports. Typically omit Job Updates report *zhss9151*, which is a Graduate School report.
 - c) Click OK.

To send the report to an Adobe Acrobat file displayed in your browser:

- a) Select the following parameters:

- Server = **PSUNX**
 - Type = **Window**
- b) Format = **PDF** Choose the reports you want to run. You may select multiple reports. Typically omit Job Updates report *zhss9151*, which is a Graduate School report.
 - c) Click OK. A new window pops up, showing a status of queued. When the report is ready, the window is resized, and the report is displayed in Adobe Acrobat.
 - d) You can save the report or print it, using the Acrobat toolbar buttons.
10. Navigate to **Set Up HRMS > Product Related > Workforce Administration > Princeton Setup > Princeton Process Table**.
 11. Under *Daily Turnaround Reports Date*, type the date and time stamp that was originally in this field (see Step 2).



Note: If you do not reset this value to the original date that was in this field, all daily audit reports (including all HR offices, Graduate School, and Visa office) will run from the rerun date you specified.

12. Click the Save  button.

For System Administrators

System administrators are responsible for making some changes, such as updating core tables and Profile Management codes.

Updating Table Data

On occasion, new values need to be added to core tables (for example, new department numbers, new job codes, or new action/reason codes). HCM system administrators or system managers are responsible for making these updates.

There are many tables to choose from and each table has unique and required fields to update. The following sample procedure outlines the steps used to update the table data.




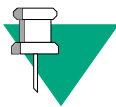

Sample steps to update action/reason table data:

1. Select **Set Up HRMS > Product Related > Workforce Administration > Action Reasons**.
2. On the Find page:
 - a) Type the *Action* and *Reason Code*.
 - b) If you are making a correction, select () *Correct History*.
 - c) Click the Search button



Tip! If you do not know the Reason Code, type the Action and click the Search button to display a list of the associated reason codes. Then click on the appropriate reason code link to display the table.

3. Under the *Action/Reason* header bar:
 - a) If you are adding an action/reason definition, click the Add button to insert a new row in the record.
 - b) Type the *Effective Date* of the change in *mm/dd/yyyy* format, or click the Calendar button to select the date.
 - c) For *Status*, click the down arrow and either **Active** or **Inactive**.
 - d) For *Description*, type a longer description of the action/reason. This will show up in the drop-down lists for the field on data entry pages.

- e) For *Short Description*, type a short description of the action/reason.
4. In the USA Flag  area:
- a) For *Benefits Employee Status*, select the class of employees who are eligible to receive benefits, for example, **Active** or **Leave**.
- 
- Note:** If the *Benefits Employee Status* field is blank, then the field will default to the preceding entry on the preceding record.
- b) For *Benefits Administration Action*, type the code that directs Benefits Administration on how to process the action.
- c) For *COBRA Action*, type the appropriate reason code for COBRA processing of this action, or leave the field blank.
5. Click the Save  button.

Updating Profile Management Codes

The codes used within Profile Management, such as Degree Codes and Language Codes, are maintained in a general category known as **Content**. *Content Types* define the types of codes (degree, license, etc.), while *Content Items* are the codes within a Content Type (Bachelors Degree, CPA, French, etc.)



Important! *It is possible to add new categories of content (Content Types), however, since they cannot be used without changing the configuration of the Profile Type(s) that will use them, you must consult with the application support team before attempting to add a new Content Type.*

Note: Content codes must be unique within all of Profile Management, not just within a content type. For example, you cannot have a Language Code of **TM** for Tamil as well as a Competency Code of **TM** for Time Management.



To update content items:



1. Navigate to **Setup HRMS > Product Related > Profile Management > Content Catalog > Content Items**.

2. In the *Content Type* field, select the content type you want to update.
3. Click the Search  button.
4. In the search results, select the code you want to edit by clicking any link in the row. If the item is not listed, follow the procedure “To add a new content item:” on page 276.
5. Add a new effective-dated row by clicking the Add Row  button.
6. In the *Effective Date* field, enter the date when the changed status or data should take effect

Note: It is recommended that for the initial record added, the *Effective Date* should always be **January 1, 1901**. For the initial record added, the effective date must be earlier than any data records that require this code. For example, if an employee received a Bachelor’s Degree in 1938, the code for Bachelor’s Degree must have an effective date earlier than 1938.

7. To inactivate a code, change the *Status* to **Inactive**. The code will no longer appear in the list box on the profile management pages, but will be available in historical records.

Important! Never delete a code, because it may be referenced by historical records. Instead, inactivate the code.

8. Update the *Description* and other fields as needed. To check your spelling, click the Spell Check  button next to the text entry field.
9. Click the Save  button to save your changes.




To add a new content item:



1. Navigate to **Setup HRMS > Product Related > Profile Management > Content Catalog > Content Items**.
2. Click the Add a New Value tab.
3. In the *Content Type* field, select the content type to which you want to add a new item.

4. In the *Content Item ID* field, enter the 8-character code that will identify the content item.

Note: Content codes must be unique within all of Profile Management, not just within a content type. For example, you cannot have a Language Code of **TM** for Tamil as well as a Competency Code of **TM** for Time Management. This can be prevented by beginning the code with a type identifier, such as **LANG_TM** and **COMP_TM**.

5. Click the Add  button to display the Item Details page.
6. In the *Effective Date* field, enter a date earlier than any data records that require this code. For example, if an employee received a Bachelor's Degree in 1938, the code for Bachelor's Degree must have an effective date earlier than 1938.

Note: It is recommended that for the initial record added, the *Effective Date* should always be **January 1, 1901**.

7. Make sure the *Status* is **Active**.
8. In the *Description* field, type a brief description of the content item. If desired, you can click the Spell Check  button at the end of the field to check your spelling.
9. Enter the content item *Code*. This code should be unique in all of Profile Management.
10. Click the Save  button to save the new content item.

Appendix A: Tips & Techniques for DOF Users



<i>Determining Benefits Eligibility</i>	<i>280</i>
<i>Determining DOF Action/Reasons</i>	<i>283</i>

Determining Benefits Eligibility

A staff member qualifies for medical benefits (*Reg/Temp* is **R=BenElig**) if he or she meets the following conditions

Benefits Eligible	
<p>Persons appointed in the following groups...</p> <ul style="list-style-type: none"> ✧ Regular & Visiting Faculty ✧ Regular & Visiting Professional Researchers (excluding Postdoctoral Research Fellows, Visiting Fellows, and Visiting Research Collaborators) ✧ Regular & Visiting Professional Specialists ✧ Regular & Visiting Professional Librarians 	<p>...are Benefits-eligible if they meet the following criteria:</p> <ul style="list-style-type: none"> ✧ Duty-time is greater than or equal to 50% time AND ✧ Months worked is greater than or equal to 5 months AND ✧ Salary paid is greater than 0 AND ✧ Not in the Non-Paid pay group (for example, staff on Institutional Payment or Princeton-Rutgers Exchange agreements)
<p>Persons appointed in the following ranks...</p> <ul style="list-style-type: none"> ✧ Postdoctoral Research Fellow ✧ Visiting Fellow 	<p>...are Benefits-eligible if they meet the following criteria:</p> <ul style="list-style-type: none"> ✧ Duty-time is greater than or equal to 50% time AND ✧ Months worked is greater than or equal to 5 months

A staff member does **not** qualify for medical benefits (*Reg/Temp* is **T=NoBen**) if the conditions are true

Not Benefits Eligible	
<p>Persons appointed in the following groups...</p> <ul style="list-style-type: none"> ✧ Regular & Visiting Faculty ✧ Regular & Visiting Professional Researchers (excluding Postdoctoral Research Fellows, Visiting Fellows, and Visiting Research Collaborators) ✧ Regular & Visiting Professional Specialists ✧ Regular & Visiting Professional Librarians 	<p>...are not Benefits-eligible if any of the following is true:</p> <ul style="list-style-type: none"> ✧ Duty-time is less than 50% time OR ✧ Months worked is less than 5 months OR ✧ Salary paid is \$0 OR ✧ Are in the Non-Paid pay group (for example, staff on Institutional Payment or Princeton-Rutgers Exchange agreements)

Not Benefits Eligible	
<p>Persons appointed in the following ranks...</p> <ul style="list-style-type: none"> ✧ Postdoctoral Research Fellow ✧ Visiting Fellow 	<p>...are <i>not</i> Benefits-eligible if any of the following is true:</p> <ul style="list-style-type: none"> ✧ Duty-time is less than 50% time OR ✧ Months worked is less than 5 months
<p>Persons appointed in the following rank or appointment type...</p> <ul style="list-style-type: none"> ✧ Summer-only Faculty (Regular & Visiting) ✧ Visiting Research Collaborators ✧ Persons appointed through HHMI (Howard Hughes Medical Institute) regardless of rank 	<p>...are <i>never</i> benefits-eligible.</p>

- ✧ Retroactive changes to duty time, term of appointment, and pay status will also retroactively affect benefits eligibility.
- ✧ Initial short-term appointments and reappointments of less than 5 months will remain non-benefits-eligible until a reappointment is made for a term of 5 months or longer. At that point, the person will become benefits-eligible, effective the date of the reappointment that is at least of 5 months duration, and if all other criteria for benefits-eligibility (duty-time, salary, pay status) are met.

If a person is already in a benefits-eligible status and receives a reappointment or transfer of 1-4 months duration, they will carry their benefits eligibility through to the end of this short-term extension as long as all other criteria for benefits eligibility continue to be met.

Table 1 shows a sequence of short-term appointments, noting when the employee becomes benefits eligible, and when they lose their eligibility.

Table 1: Sample Sequence of Appointments with Resulting Benefits Eligibility

Appointment Period	Action	Number of Months	Benefits Eligible?
7/1/03–9/1/03	New Hire	2 months	Not benefits eligible.
9/1/03–12/1/03	Reappointment	3 months	Still not benefits eligible. Even though the total of the 2 appointment periods is 5 months, each individual appointment is still less than 5 months.
12/1/03–12/1/04	Reappointment	12 months	Becomes benefits eligible.
12/1/04–1/1/05	Reappointment	1 month	Remains benefits eligible, since this appointment continues after the longer appointment without a break in service.
1/1/05	Termination		
4/1/05–7/1/05	Rehire	4 months	Not benefits eligible, because of the break in service.

Determining DOF Action/Reasons

It is sometimes difficult to tell which Action and Reason codes to use for a DOF personnel action. Check the list in Table 2 for help in determining which Action/Reason codes to use.

Table 2: Hints for Action/Reason Code Determination

Action	Reason	Use When
Hire	Regular Staff	The person is totally new to the system
Rehire	Rehire	The person has been here before, and the last service was as an employee
Rehire	Regular Staff	The person has been here before, but only prior service was not as a regular employee (that is, a casual hourly)
Transfer	Staff Transfer	For DOF, the first character of a person's staff/job function code is changing, that is, RV to FR
Transfer	Dept Transfer	Only the department number is changing
Promotion	Promotion	For DOF, the person's staff/job function code remains the same, but the jobcode changes to a higher rank
Demotion	Drop in Grade or Rank or Unsatisfactory Performance	For DOF, the person's staff/job function code remains the same, but the jobcode changes to a lower rank (used for disciplinary reasons only)
Transfer	DOF Reclassification	For DOF, the second character of a person's staff/job function code changes, but the first character remains the same (that is, FV changes to FR), or when the person remains in staff, but demotion is not appropriate
Transfer	Reappointment	The estimated termination date is changing. On occasion, you may use Data Change/Change in Appointment End Date if the extension is not due to a reappointment (for example, extension of term for Assistant Professor for child rearing leave).
Pay Rate Change	Annual Increase	Annual salary increase
Pay	Periodic Increase	Salary increases which are not part of the the annual salary increase process

Table 2: Hints for Action/Reason Code Determination (Continued)

Action	Reason	Use When
Leave of Absence	various <i>Reason</i> codes apply	Unpaid leave of absence
Paid Leave of Absence	various <i>Reason</i> codes apply	Paid leaves of absence. Be sure to select the <i>Reason</i> code that indicates the level of pay.
Termination or Retirement	various <i>Reason</i> codes apply	The person is ending their employment with the University
Termination	Death	The person has died while employed at the University

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