CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

Palm Beach County School District—HRIM Team

Updating Job Information
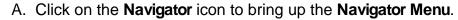
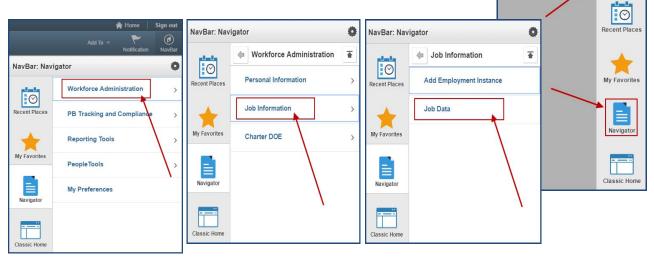# How to Update an Employee's Job Information

All job information changes are made to the employee's current job record. When updating the job information, always be sure to choose the correct **Action/Reason** and to update all the information on each tab in the **Job Data** screens. Please note: if a salary change is made, you will need to click the *Calculate Compensation* button on the **Compensation** tab before saving.

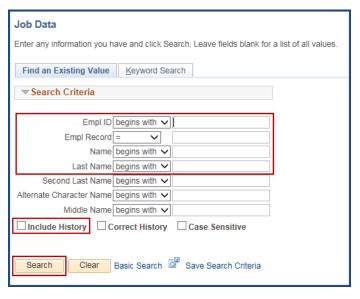1. In PeopleSoft, click on the **Human Capital Management** tile.

2. In the next window, click on the **NavBar** icon to bring up the **NavBar** menu.
   A. Click on the **Navigator** icon to bring up the **Navigator Menu**.
   B. Click on **Workforce Administration**
   C. Click on **Job Information**
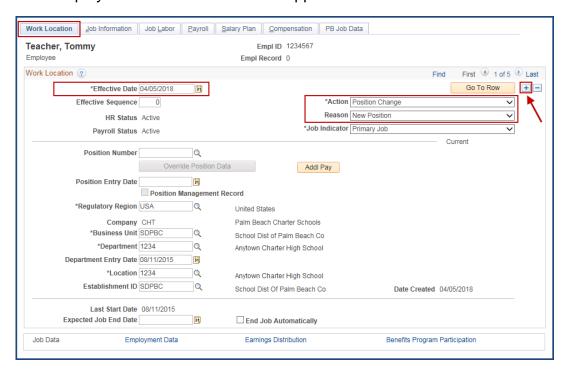   D. Click on **Job Data**

The Job Data Search Screen will display.

3. There are three (3) ways to search for an employee:

   A. Enter the **Employee ID** in the **Empl ID** field, or
   B. Enter the **last name**, **first** in the **Name** field, or
   C. Enter the **last name**, only, in the **Last Name** field.

4. Click the **Include History** box.

5. Click the **Search** button.

The Employee's **Job Data** screen will appear.

1. On the **Work Location** section, click on the **plus sign** (+) button to add a new row.

2. Enter the **Effective Date** of the new information to be entered.

3. In the **Action** and **Reason** fields, select the appropriate **Action** and **Reason**.

4. Click the **Job Information** tab to go to the **Job Information** page.

5. If changing positions, click on the **magnifying glass** button to select the appropriate job code.

6. Update the **Standard hours**, **Work period** and **FTE** fields, if needed.

7. Update the **Job Labor**, **Payroll**, **Salary Plan** and **Compensation** Tabs, if needed.

8. Click the **Save** button at the bottom of the page..

How to Terminate an Employee
(or to terminate a Record created in error)

1. On the **Work Location** section, click on the **plus sign (+)** button to add a new row.

2. In the **Effective Date** field, enter the termination date.
   (Note: If you are terminating a Record that was created in error and you are using the same date from the prior row, you will need to choose the next number in the Effective Sequence field. Example: If prior Effective Sequence was "0" you'll need to choose "1.")

3. In the **Action** field, click on the **drop down arrow** and select "**termination**."

4. In the **Reason** field, select the appropriate reason.
   *(Note: If you are terminating a Record that was created in error, choose "Created Record in Error" for the **Reason**.)*

5. Click the **Save** button at the bottom of the page.

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

Teacher, Tommy   Empl ID 1234567
Employee   Empl Record 0

Work Location (?)   Find   First ◄ 1 of 5 ► Last

*Effective Date 04/05/2018   Go To Row   [+] [−]
Effective Sequence 0   *Action Termination
HR Status Inactive   Reason Other Resignation
Payroll Status Terminated   *Job Indicator Primary Job

TIP: This is the day after the employee's last day of work.

Current

Position Number

Override Position Data   Addl Pay

TIP: Do not select options that begin with "cc."

Position Entry Date
☐ Position Management Record
*Regulatory Region USA   United States
Company CHT   Palm Beach Charter Schools
*Business Unit SDPBC   School Dist of Palm Beach Co
*Department 1234   Anytown Charter High School
Department Entry Date 08/11/2015
*Location 1234   Anytown Charter High School
Establishment ID SDPBC   School Dist Of Palm Beach Co   Date Created 04/05/2018

Last Start Date 08/11/2015   Termination Date 04/04/2018
Expected Job End Date   ☐ End Job Automatically
    ☐ Override Last Date Worked
Last Date Worked 04/04/2018

| Job Data | Employment Data | Earnings Distribution | Benefits Program Participation |