



Mini-Manual

SCREENS AND PROCESSES FOR BUSINESS MANAGERS

Note: This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.

If you have not used one of the new “Mini-Manuals” you may wish to consult the document [“Getting the Most Out of Mini-Manuals”](#) prior to using this document.

If you have questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail psguides@uvm.edu.

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(Click on topic headings to automatically jump to a specific section.

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Background

Workforce Administration, Workforce Development and Organizational Development are three important modules within PeopleSoft. A large variety of data ranging from personal and job information to budget specifications and compensation can be viewed here. Remember that the type and amount of information available to a user is determined by the user's particular security permissions. Access to specific jobs and employees may also be limited due to the practice of cost-sharing. The user that is based in the position's *home department* has access to the records. This Mini-Manual has been designed with the typical user in mind.

The three modules covered in the Mini-Manual are largely used for referencing or gathering very specific information. For that reason we have added a [Terminology Index](#) on the last page that can be used to identify on which PeopleSoft screens the data is available. Simply click on the term to be taken directly to the screen shot where it can be located. Navigation paths have also been listed throughout to make it easier to access the correct section of PeopleSoft.

Workforce Administration

Workforce Administration allows the user to view all pertinent information, both current and historic, about an individual employee (e.g. demographics, anniversary and birth dates, addresses and phone numbers, business unit, department, job information, employee status, compensation rates, etc.). The *Employee Record #* (0, 1, 2, etc.) found in the right corner of each screen indicates which record is visible. Each employee begins with the record number 0. The employee is assigned additional numbers as required by job or status changes.

Note: The following images from PeopleSoft contain real, "live" data. Therefore, all references to the individual employee or position have been removed.

Step-by-Step Instructions: Personal Information Screen

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
2. Navigation: **Workforce Administration > Personal Information > Biographical > Modify a Person**



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3. The search screen will display:

4. Enter the search criteria and click the **Search** button.

5. **Search Results** will display. Select the employee.

Biographical Details Screen

6. The **Biographical Details** tab will appear and the employee's most current record will display:

NAV: Workforce Administration>Personal Information>Biographical>Modify a Person>Biographical Details



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- 7. To see all historical records for the employee, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Contact Information Screen

- 8. Click the **Contact Information** tab to display the following:

Biographical Details | **Contact Information** | Regional

Rally Cat Person ID: 0101791

Current Addresses			
Address Type	As Of Date	Status	Address
Home	09/16/2011	A	Patrick Gymnasium Burlington VT 05405
Business	10/03/2011	A	Patrick Gymnasium Burlington VT 05404
Check	10/03/2011	A	Patrick Gymnasium Burlington VT 05404

Phone Information			
Phone Type	Telephone	Extension	Preferred
			<input type="checkbox"/>

Email Addresses		
Email Type	Email Address	Preferred
Business	rallycat@uvm.edu	<input checked="" type="checkbox"/>

[Biographical Details](#) | [Contact Information](#) | [Regional](#)

NAV: Workforce Administration>Personal Information>Biographical>Modify a Person>Contact Information



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Regional Screen

9. Click the **Regional** tab to display the following:

Biographical Details | Contact Information | **Regional**

Rally Cat Person ID: 0101791

USA

Ethnic Group Find | View All | First 1 of 1 Last

Regulatory Region: USA United States Ethnic Group: Primary

History Find | View All | First 1 of 1 Last

Effective Date: 05/15/2010

Date Entitled to Medicare: Military Status:

Citizenship (Proof 1): Citizenship (Proof 2):

Eligible to Work in U.S.

Smoker History Customize | Find | First 1 of 1 Last

Smoker	As of
1	

Save | Return to Search | Notify | Previous tab | Next tab | Refresh | Update/Display | Include History

Biographical Details | Contact Information | Regional

NAV: Workforce Administration>Personal Information>Biographical>Modify a Person>Regional

10. To return to the **Search Results**, click the **Return to Search** button.

Job Information

Note: Users may not have access to view the *Earnings Distribution* or *Benefits Program Participation* links at the bottom of the screens in the Job Information section.

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
2. Navigation: **Workforce Administration > Job Information > Job Data**



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3. The search screen will display:

The search screen features a header 'Find an Existing Value' and a text input field. Below this, there is a control for 'Limit the number of results to (up to 300):' with a value of '300'. The main search criteria are listed as follows:

- Empl ID:** begins with []
- Name:** begins with []
- Last Name:** begins with []
- Second Name:** begins with []
- Alternate Character Name:** begins with []
- Middle Name:** begins with []

Additional options include checkboxes for 'Include History' and 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

4. Enter the search criteria and click the **Search** button.

5. Search Results will display. Select the employee.

Work Location Screen

6. The **Work Location** tab will appear and the employee's first record will display:

The 'Work Location' screen displays details for employee EMP (ID: 0101791, Empl Rcd #: 1). The 'Work Location' tab is active, showing the following information:

- HR Status:** Active
- Payroll Status:** Active
- Effective Date:** 09/16/2011
- Sequence:** 0
- Action / Reason:** Hire
- Job Indicator:** Primary Job
- Last Start Date:** 09/16/2011
- Termination Date:** []
- Expected Job End Date:** []
- Position Number:** []
- Position Entry Date:** []
- Regulatory Region:** USA
- Company:** UVM
- Business Unit:** 01
- Department:** 30500
- Location:** 160
- Establishment ID:** UVM
- United States**
- The University of Vermont**
- Finance & Admin**
- Human Resources**
- Waterman Bldg**
- University of Vermont**
- Department Entry Date:** 09/16/2011
- Date Created:** 09/16/2011

Navigation links include 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. A toolbar at the bottom contains buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Previous tab', 'Next tab', 'Refresh', 'Update/Display', and 'Include History'.

NAV: Workforce Administration>Job Information>Job Data>Work Location



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- To see all historical records for the employee, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Job Information Screen

- Click the **Job Information** tab to display the following:

Work Location		Job Information		Job Labor		Payroll		Salary Plan		Compensation	
Rally Cat		EMP		ID: 0101791		Empl Rcd #: 0					
Job Information Find First 1 of 1 Last											
Effective Date:	09/29/2011	Effective Sequence:	0	Job Indicator:	Secondary Job						
Action / Reason:	Rehire	Rehire	Current								
Job Code:	0996	Temporary Hourly Employee	Entry Date:	09/29/2011							
Supervisor Level:											
Supervisor ID:	0001001	Cameron Cougar									
Reports To:											
Regular/Temporary:	Temporary	Full/Part:	Part-Time								
Empl Class:	Student	Officer Code:	None								
Regular Shift:	N/A	Shift Rate:	/								
Classified Indc:	Unclassifd										
Standard Hours											
Standard Hours:	40.00	Combined Std Hours / FTE:	99.99 / 0.000000								
Work Period:	W	Weekly									
FTE:	0.000000	<input type="checkbox"/> Adds to FTE Actual Count?	<input checked="" type="checkbox"/> Encumbrance Override								
Contract #											
Contract Number:	<input type="text" value="Next Contract Number"/>		Contract Type:								
USA											
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation								
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Previous in List"/>	<input type="button" value="Next in List"/>	<input type="button" value="Notify"/>	<input type="button" value="Previous tab"/>	<input type="button" value="Next tab"/>	<input type="button" value="Refresh"/>	<input type="button" value="Update/Display"/>	<input type="button" value="Include History"/>		
Work Location Job Information Job Labor Payroll Salary Plan Compensation											

NAV: Workforce Administration>Job Information>Job Data>Job Information



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Job Labor Screen

9. Click the **Job Labor** tab to display the following:

Work Location | Job Information | **Job Labor** | Payroll | Salary Plan | Compensation

Rally Cat EMP ID: 0101791 Empl Rcd #: 0

Labor Information Find First 1 of 1 Last

Effective Date: 09/29/2011 Effective Sequence: 0 Job Indicator: Secondary Job

Action / Reason: Rehire Rehire Current

Bargaining Unit:

Labor Agreement: Labor Agreement Entry Dt:

Employee Category: Stop Wage Progression

Employee Subcategory: Pay Union Fee

Employee Subcategory 2: Position Management Record

Union Code: NU Non Union Union Seniority Date:

Works Council ID:

Labor Facility ID: Labor Facility Entry Date:

Exempt from Layoff: Layoff Exemption Reason:

Assigned Seniority Dates Customize | Find | View All First 1 of 1 Last

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
			<input type="checkbox"/>	

Recalculate Seniority Dates

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Refresh Update/Display Include History

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

NAV: Workforce Administration>Job Information>Job Data>Job Labor



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Payroll Screen

10. Click the **Payroll** tab to display the following:

Work Location		Job Information		Job Labor		Payroll		Salary Plan		Compensation	
Rally Cat	EMP	ID:	0101791	Empl Rcd #:	0						
Payroll Information Find First 1 of 1 Last											
Effective Date:	09/29/2011	Effective Sequence:	0	Job Indicator:	Secondary Job						
Action / Reason:	Rehire	Rehire		Current							
Payroll System:		Payroll for North America									
Payroll for North America											
Pay Group:	BW1	Biweekly Payroll	Holiday Schedule:	UVM1	UVM1						
Employee Type:	H	Hourly	FICA Status:	Exempt							
Tax Location Code:	UVMVT	Vermont									
GL Pay Type:											
Combination Code:	Edit ChartFields										
Job Data Employment Data Earnings Distribution Benefits Program Participation											
Save Return to Search Previous in List Next in List Notify Previous tab Next tab Refresh Update/Display Include History											
Work Location Job Information Job Labor Payroll Salary Plan Compensation											

NAV: Workforce Administration>Job Information>Job Data>Payroll

Salary Plan Screen

11. Click the **Salary Plan** tab to display the following:

Work Location		Job Information		Job Labor		Payroll		Salary Plan		Compensation	
Rally Cat	EMP	ID:	0101791	Empl Rcd #:	0						
Salary Plan Find First 1 of 1 Last											
Effective Date:	09/29/2011	Effective Sequence:	0	Job Indicator:	Secondary Job						
Action / Reason:	Rehire	Rehire		Current							
Salary Administration Plan:	NPL	Grade:	NP	Grade Entry Date:	09/29/2011						
Includes Wage Progression Rule:	<input type="checkbox"/>	Step:		Step Entry Date:							
Job Data Employment Data Earnings Distribution Benefits Program Participation											
Save Return to Search Previous in List Next in List Notify Previous tab Next tab Refresh Update/Display Include History											
Work Location Job Information Job Labor Payroll Salary Plan Compensation											

NAV: Workforce Administration>Job Information>Job Data>Salary Plan



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Compensation Screen

12. Click the **Compensation** tab to display the following:

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Rally Cat: EMP ID: 0101791 Empl Rcd #: 0

Compensation Find First 1 of 1 Last

Effective Date: 09/29/2011 Effective Sequence: 0 Job Indicator: Secondary Job

Action / Reason: Rehire Rehire Current

Compensation Rate: 720.00 USD Frequency: B Biweekly

▶ Comparative Information

▶ Pay Rates

Default Pay Components

Pay Components Customize | Find | First 1 of 1 Last

Amounts | Controls | Changes | Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	9.000000 USD	USD	H	

Calculate Compensation

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save | Return to Search | Previous in List | Next in List | Notify | Previous tab | Next tab | Refresh | Update/Display | Include History

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

NAV: Workforce Administration>Job Information>Job Data>Compensation



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Employment Data Screen

13. Click the **Employment Data** tab to display the following:

Employment Information						
Rally Cat	EMP	ID:	0101791	Empl Rcd #:	0	
Organizational Instance						
Organizational Instance Rcd:	0	Original Start Date:	05/18/2010	<input type="checkbox"/> Override		
Last Start Date:	09/29/2011	First Start Date:	05/18/2010			
Termination Date:				Years	Months	Days
Org Instance Service Date:	05/18/2010	<input type="checkbox"/> Override		1	10	5
Organizational Assignment Data						
Instance Record						
Last Assignment Start Date:	09/29/2011	First Assignment Start:	05/18/2010			
Assignment End Date:						
Home/Host Classification:	Home			Years	Months	Days
Company Seniority Date:	05/18/2010	<input type="checkbox"/> Override		1	10	5
Benefits Service Date:	05/18/2010	<input type="checkbox"/> Override		1	10	5
Seniority Pay Calc Date:	05/18/2010	<input type="checkbox"/> Override		1	10	5
Probation Date:						
Professional Experience Date:		Last Verification Date:				
Business Title:		Position Phone:				
USA						
Job Data Employment Data Earnings Distribution Benefits Program Participation						
Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History						

NAV: Workforce Administration>Job Information>Job Data>Employment Data

14. To return to the **Search Results**, click the **Return to Search** button.



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Workforce Development

The purpose of the Workforce Development module is to identify and track employee-specific information regarding tenure.

Note: The following images from PeopleSoft contain real, “live” data. Therefore, all references to the individual employee or position have been removed.

Faculty Events

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
2. Navigation: **Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data**
3. The search screen will display:

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

Include History Case Sensitive

[Basic Search](#)

4. Search Results will display. Select the employee to be viewed.



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Tenure Data Screen

5. The Tenure Data screen will appear and the employee's current record will display:

Tenure Data

Benton Quest ID: 0908765

Tenure Status: Tenure Home Rank: 875 Professor

Track Start Date: 09/01/2006 Change Date: 09/01/2010 Change Reason:

Original Track Date: Tenure Home: 52000 RSENR Dean's Ofc Grant Tenure:

Service Calc. Group: Mandatory Review Dt: Granted Date: 09/01/2007

Override Calculation Committed FTE: Notes

Probation (Number of Years)

Total Required: 0.000000 Time Accrued: 0.000000 Current As Of Date:

Extended By: 0.000000 Time To Accrue: 0.000000 Terminal Year

Other Tenure Departments List Customize | Find | View All | First 1 of 1 Last

Department	Description	Grant	Rank	Rank Description	Tenure Status	Effective Date	FTE
1							

Save Return to Search Previous in List Next in List Notify

NAV: Workforce Development>Faculty Events>Calculate Tenure>Create Tenure Data

6. To return to the Search Results, click the Return to Search button.

Organizational Development

Organizational Development provides the user critical information regarding positions within the user's area of responsibility. Budget data, reporting relationships and salary administration information are all located within this module.

Note: The following images from PeopleSoft contain real, "live" data. Therefore, all references to the individual employee or position have been removed.



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Position Management

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
2. Navigation: **Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info**
3. The search screen will display:

Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

Include History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

4. Enter the search criteria and click the **Search** button.
5. **Search Results** will display. Select the position to be viewed.



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Description Screen

6. The **Description** tab will appear and the position's first record will display:

The screenshot displays a web-based interface for viewing position details. It features several tabs: 'Description' (selected), 'Specific Information', and 'Budget and Incumbents'. The main content area is divided into sections: 'Position Information', 'Job Information', 'Work Location', and 'Salary Plan Information'. At the bottom, there are navigation buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Previous tab', 'Next tab', 'Update/Display', and 'Include History'. A breadcrumb trail at the bottom left reads: 'Description | Specific Information | Budget and Incumbents'.

Position Information							
Position Number:							
Headcount Status:	Filled	Current Head Count:	1 out of	1			
Effective Date:	07/01/2010	Status:	Active				
Reason:	UPD Position Data Update	Action Date:	09/01/2010				
Position Status:	Approved	Status Date:	07/01/2005	<input type="checkbox"/> Key Position			

Job Information							
Business Unit:	01	Genl. Institutional					
Job Code:	3031	Administrative Professional	Manager Level:	Non-Manager			
Reg/Temp:	Regular		Full/Part Time:	Full-Time			
Regular Shift:	1		Union Code:	NU	Non Union		
Title:	Administrative Professional		Short Title:	AdmPr	Detailed Position Description		

Work Location							
Reg Region:	USA	United States					
Department:	58200	Graduate College	Company:	UVM	The University of Vermont		
Location:	160	Waterman Bldg					
Reports To:	00021732	Business Optrns Administrator		Dot-Line:			
Supervisor Lvl:							

Salary Plan Information							
Salary Admin Plan:	P19	Grade:	303	Step:			
Standard Hours:	37.50	Work Period:	W	Weekly			
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	7.50	7.50	7.50	7.50	7.50		

NAV: Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info>Description

7. To see all historical records, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.



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Specific Information Screen

8. Click the **Specific Information** tab to display the following:

The screenshot displays the 'Specific Information' tab of a web application. At the top, there are three tabs: 'Description', 'Specific Information' (selected), and 'Budget and Incumbents'. Below the tabs, the following information is visible:

- Position Number: (blank)
- Headcount Status: Filled
- Current Head Count: 1 out of 1
- Effective Date: 07/01/2010
- Status: Active
- Job Profile ID: (blank)
- Max Head Count: 1
- Mail Drop ID: (blank)
- Work Phone: (blank)
- Health Certificate: (blank)
- Signature Authority: (blank)
- Education and Government section:
 - Position Pool ID: (blank)
 - Pre-Encumbrance Indicator: None
 - Encumber Salary Option: Salary Grade Midpoint
 - Classified Indicator: Classified
 - Calc Group (Flex Service): (blank)
 - Academic Rank: (blank)
 - FTE: 1.000000
 - Adds to FTE Actual Count:
- Incumbents section:
 - Update Incumbents
 - Include Salary Plan/Grade
 - Budgeted Position
 - Confidential Position
 - Job Sharing Permitted
 - Available for Telework

At the bottom of the screen, there is a navigation bar with the following buttons: Save, Return to Search, Previous in List, Next in List, Notify, Previous tab, Next tab, Update/Display, and Include History. Below the buttons, there are links for Description, Specific Information, and Budget and Incumbents.

NAV: Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info>Specific Information



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Budget and Incumbents Screen

- Click the **Budget and Incumbents** tab to display the following:

NAV: Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info>Budget and Incumbents

- To return to the **Search Results**, click the Return to Search button.

Review Position/Budget Info

- Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
- Navigation: **Organizational Development > Position Management > Review Position/Budget Info > Position Summary**
- The search screen will display:



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4. Enter the search criteria and click the **Search** button.
5. **Search Results** will display. Select the position to be viewed.

Position Data Summary Screen

6. The **General** tab will appear and the position record will display:

Position Data Summary

Position Number: Administrative Professional

Position Data Customize | Find | [Icons] | First 1-3 of 3 Last

General Work Location Payroll Information

Effective Date	Action Reason	Status	Status Date	Max Head Count	Budgeted
07/01/2009	Update	Approved	07/01/2005	1	Y
06/01/2007	Update	Approved	07/01/2005	1	Y
07/01/2005	New Posn	Approved	07/01/2005	1	Y

Return to Search Notify

NAV: Organizational Development>Position Management>Review Position/Budget Info>Position Summary

7. Click the **Work Location** tab to display the following:

Position Data Summary

Position Number: Administrative Professional

Position Data Customize | Find | [Icons] | First 1-3 of 3 Last

General Work Location Payroll Information

Effective Date	Reports To	Short Desc	Unit	Location	Job Code	Dept
07/01/2009		Exec	03	284 EA	3032	PhysPlant
06/01/2007		Dir	03	284 EA	3032	PhyPlant
07/01/2005		Dir	03	284 EA	3031	PhyPlant

Return to Search Notify

NAV: Organizational Development>Position Management>Review Position/Budget Info>Position Summary



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8. Click the **Payroll Information** tab to display the following:

Position Data Summary

Position Number: Administrative Professional

Position Data Customize | Find | [Print] [Grid] First 1-3 of 3 Last

General Work Location Payroll Information

Effective Date	Req/Temp	Full/Part	Standard Hours	Work Period	Shift
07/01/2009	Regular	Full-Time	40.00	Weekly	1
06/01/2007	Regular	Full-Time	40.00	Weekly	1
07/01/2005	Regular	Full-Time	37.50	Weekly	N/A

NAV: Organizational Development>Position Management>Review Position/Budget Info>Position Summary

Position History Screen

1. Return to **Review Position/Budget Info** screen and click the **Position History** link.
2. The search screen will display:

Position History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

Case Sensitive

[Basic Search](#)

3. Enter the search criteria and click the **Search** button.
4. **Search Results** will display. Select the position to be viewed.



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5. The **Position History** tab will appear and the position record will display:

The screenshot shows the 'Position History' tab for an 'Administrative Professional' position. It includes a table with the following data:

Position Entry Date:	Compensation Rate	USD	Semimonthl	Sal Plan	Grade	Step
07/18/2005	2,229.17			P19	303	

Additional fields shown include 'Position End Date' and 'Exit Reason', both with links to 'Components'. Navigation buttons at the bottom include 'Return to Search' and 'Notify'.

NAV: Organizational Development>Position Management>Review Position/Budget Info>Position History

Budget Status Screen

1. Return to **Review Position/Budget Info** screen and click the **Budget Status** link.

2. The search screen will display:

The screenshot shows the 'Budget Status' search interface. It includes a search bar with the text 'Find an Existing Value', a 'Limit the number of results to (up to 300):' field set to '300', and a 'Search by:' dropdown menu. The dropdown menu is open, showing options: Business Unit, Department, Description, Job Code, Position Number (highlighted), Position Status, and Reports To Position Number. A 'Search' button is visible to the left of the dropdown.

3. Enter the search criteria and click the **Search** button.

4. **Search Results** will display. Select the position to be viewed.



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5. The **Position Budget Status** tab will appear and the position record will display:

Position Budget Status					
Position Number:	Administrative Professional				
Position Status:	Active	Approved	Status Date:	07/01/2005	<input checked="" type="checkbox"/> Budgeted
Business Unit:	13	Medicine			
Job Code:	3031	Administrative Professional			
Department:	55650	Pathology			
Current Budget					
Max Head Count:	1				
Actual Head Count:	1	Total Budget FTE:	1.00	Total Budget Amount:	66,270.000000 USD
Current Budget Head Count:	0	Current Budget FTE:		Current Budget Amount:	
Head Count Variance:	1	FTE Variance:	1.00	Amount Variance:	66,270.00
Current Incumbents					
<input type="button" value="Return to Search"/> <input type="button" value="Notify"/>					

NAV: Organizational Development>Position Management>Review Position/Budget Info>Budget Status

Vacant Budgeted Positions Screen

1. Return to **Review Position/Budget Info** screen and click the **Vacant Budgeted Positions** link.
2. The search screen will display:

Vacant Budgeted Positions	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
<input type="button" value="Find an Existing Value"/>	
Limit the number of results to (up to 300):	<input type="text" value="300"/>
SetID:	= <input type="text"/> <input type="button" value="Search"/>
Department:	begins with <input type="text"/> <input type="button" value="Search"/>
Description:	begins with <input type="text"/>
Company:	begins with <input type="text"/>
Location SetID:	begins with <input type="text"/> <input type="button" value="Search"/>
Location Code:	begins with <input type="text"/> <input type="button" value="Search"/>
<input type="checkbox"/> Case Sensitive	
<input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Save Search Criteria"/>	

3. Enter the search criteria and click the **Search** button.



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4. **Search Results** will display. Select the position to be viewed.

5. The **Position Information** tab will appear and the position record will display:

Vacant Budgeted Positions

SetID: SHARE Department: 52000 A&S Dean's Ofc Total Vacant Positions: 11

Customize | Find | View All | First | 1-10 of 11 | Last

Position Information | Job Information | Work Location

Position	Description	Position Status	Reports To	Short Description	Vacant Positions	Max Head Count	Full/Part Time	Regular/Temporary
00021730	TBC Faculty	Approved	003885	Dean	1	1	Full-Time	Regular
001797	Administrative Professional	Approved	005976	BusOpAdmn	1	1	Full-Time	Regular
002412	Administrative Professional	Approved	016774	AdmPrSr	1	1	Full-Time	Regular
003885	Dean	Approved	002958	SrVP&Prvst	1	1	Full-Time	Regular
004588	Office/Progm Support Genl	Approved	003054	StdSvcAdmn	1	1	Full-Time	Regular
005976	Business Operations Admin	Approved	003885	Dean	1	1	Full-Time	Regular
010644	Associate Dean	Approved	018830	IntrmDean	1	1	Full-Time	Regular
013161	Office/Progm Support Genl	Approved	003054	StdSvcAdmn	1	1	Full-Time	Regular
016345	Professor Emeritus	Approved	003885	Dean	1	1	Full-Time	Regular
018344	Associate Dean	Approved	003885	Dean	1	1	Full-Time	Regular

Return to Search | Notify

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions



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6. Click the **Job Information** tab to display the following:

Vacant Budgeted Positions

SetID: SHARE Department: 52000 A&S Dean's Ofc Total Vacant Positions: 11

Customize | Find | View All | First 1-10 of 11 Last

Position Information Job Information Work Location

Position	Job Code	Short Description	Manager Level	Job Function	Salary Administration Plan	Salary Grade	Step
00021730	0002	TBCFaculty	Other		NPL	NP	
001797	3031	AdmPr	Non-Mgr	208	P19	303	
002412	3031	AdmPr	Non-Mgr	208	P19	303	
003885	0820	Dean	Non-Mgr	110	NPL	NP	
004588	2031	OPSptGenl	Non-Mgr	200	C19	203	
005976	3541	BusOpAdmn	Non-Mgr	208	P19	354	
010644	0818	AssocDean	Non-Mgr	110	NPL	NP	
013161	2031	OPSptGenl	Non-Mgr	200	C19	203	
016345	0927	ProfEmerts	Non-Mgr	020	NPL	NP	
018344	0818	AssocDean	Non-Mgr	110	NPL	NP	

Return to Search Notify

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions

7. Click the **Work Location** tab to display the following:

Vacant Budgeted Positions

SetID: SHARE Department: 52000 A&S Dean's Ofc Total Vacant Positions: 11

Customize | Find | View All | First 1-10 of 11 Last

Position Information Job Information Work Location

Position	Description	Location
00021730	The University of Vermont	438 College Street
001797	The University of Vermont	438 College Street
002412	The University of Vermont	438 College Street
003885	The University of Vermont	438 College Street
004588	The University of Vermont	438 College Street
005976	The University of Vermont	Waterman Bldg
010644	The University of Vermont	438 College Street
013161	The University of Vermont	438 College Street
016345	The University of Vermont	438 College Street
018344	The University of Vermont	438 College Street

Return to Search Notify

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions

8. To return to the **Search Results**, click the Return to Search button.



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Appendix

Action / Reason – Changes to a record require the user to select an *Action* from an extensive pick list, indicating why the action was taken (e.g. *Data Change, Demotion, Hire, Layoff, Position Change, Termination, etc.*). *Reason* codes are also chosen from a drop-down menu based on the selected action. The reason provides more detail on why an action was taken.

Compa-Ratio – The *Comparative Ratio* illustrates how the particular employee's rate of compensation compares to other employees within the same *Salary Grade*.

Compensation Rate – This is the rate at which an employee is paid during a pay period.

Effective Date – This field indicates date on which a transaction occurred. It allows a chronological history of the data.

Effective Sequence – Enables the user to enter more than one row with the same *Effective Date* (e.g. entering a transfer and a pay rate change on the same day)

Empl Class – Allows UVM to group its employees into various categories via a pick-list (i.e. 12 Month Staff, 10 Month Faculty, 9 Month Graduate Assistant, etc.).

Employee Type – Potential codes: H=*Hourly*; S=*Salaried*

Encumbrance – This is a management tool used to reflect commitments in the accounting system and attempt to prevent overspending. Encumbrances allow organizations to recognize future commitments of resources prior to an actual expenditure.

Ethnic Group – This information is provided by the employee.

FICA Status – FICA is a federal payroll tax used to fund Social Security and Medicare. This field includes a drop down menu including the following choices: *Exempt, Medicare Only, Subject*.

Frequency – This field indicates how often an employee is paid. Potential codes: B=*Biweekly*; S=*Semimonthly*.

Headcount Status – This field indicates whether a position is *Filled* or *Open*.

HR Status – A=*Active*; I=*Inactive*

Job Code – A unique code associated with a specific job in the organization.

Job Indicator – Allows PeopleSoft to manage multiple jobs for one employee. This field will display *Primary Job* or *Secondary Job*.



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Pay Group – Potential codes: BW1=*Biweekly*; KRO=*Kronos*; PDF=*Pre/Post Doc Fellows*; SM1=*Semimonthly*

Payroll Status – Potential codes: *Active, Deceased, Leave With Pay, Leave of Absence, Retired, Retired With Pay, Retired-Pension Administration, Short Work Break, Suspended, Terminated, Terminated Pension Pay Out, Terminated With Pay*

Status – A=*Active*; I=*Inactive*

Tenure Status – Potential codes: *Non Tenure Not On Track, Non Tenure On Track, Not Applicable, Other, Tenure, Tenure Denied, Tenure by de facto.*

Track Start Date – Displays the date that the employee's tenure accrual begins.

Union Codes – NU: *Non Union*; TM: *Teamsters Local Union No. 597*; U1: *United Academics (Full Time)*; U2: *United Academics (Part Time)*; U3: *United Academics PT in FT Union*; UE: *United Electrical Local Union No. 267*

Additional Resources

Human Resource Services

- [Manager's Corner](#)
- [Skills Development](#)
- [Staff Handbook](#)
- [Institutional Policies](#)

Faculty Resources

- [Faculty Handbook](#)
- [Board of Trustees Policy Manual](#)

Suggestions? Updates? Send an e-mail to psguides@uvm.edu

This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.



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Terminology Index

The Terminology Index is a useful, quick-reference tool. Each term has been linked to its precise location in the corresponding screen shot. Click on the term to jump directly to its place in the document.

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[Addresses](#)

[Amount Variance](#)

-B-

[Benefits Service Date](#)

[Business Unit](#)

-C-

[Change Amount](#)

[Change Percent](#)

[Citizenship Proof](#)

[Company Seniority Date](#)

[Comparative Information](#)

[Comparative Ratio](#)

[Compensation Rate](#)

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[Date of Birth](#)

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[Eligibility to Work in US](#)

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[First Start Date](#)

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[Highest Education Level](#)

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[Total Budget Amount](#)

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-U-

[Union Code](#)