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EmpowHR – Version 9.0 Section 15 – Person Model

TITLE I
Payroll/Personnel Manual

CHAPTER 17
EmpowHR

SECTION 15
Person Model

Table Of Contents

Person Model

The Person Model is a term used to describe the information captured about a person and how the person is related to the organization. A person is important to an organization for many different reasons at many different times throughout their lifetime. Each relationship may require different attributes and different processing.

With the ***EmpowHR*** Person Model, agencies can track the personal information about the person in one place with no redundant data. The relationships that a person has to the organization are tracked in a different area of the system. For example, the user may have a person who is now an employee but was previously a contingent worker. The system tracks this person using one ID, which enables their history as a contingent worker to exist along with their history as an employee.

The Person Model supports the storing and tracking of three Person Types within one centralized repository. This enables the user to manage and report on all types of workers from seasonal to permanent.

The three Person Types are:

- Employee (EMP) - The relationship of a person who is hired to provide services to an organization on a regular basis in exchange for compensation and who does not provide these services as part of an independent business.
- Contingent Worker (CWR) - The relationship of a person who provides services to another entity under terms specified in a contract on a non-permanent basis such as:
    - Independent Contractors
    - Temporary Workers
    - Consultants
    - Auditors
- Person of Interest (POI) - A person who does not have an employment or a Contingent Worker relationship, but who is still of interest to the organization such as:
    - Cobra Participants
    - Pension Payees
    - External Students and Instructors
    - Volunteers

It is important for users to verify the relationship a person has to the agency before adding them into *EmpowHR* to ensure the correct action is processed. *EmpowHR* uses the person's Social Security Number (SSN) to validate thier existence in the system, and provides a warning message to users when they attempt to hire an employee that already has an existing relationship to the agency. Users can validate the relationship a person has to the agency using one of two components:

- ***Person Organizational Summary*** - The user can view all organizational relationships for a person.

- ***HR Processing*** - The user can view only Federal employees in *EmpowHR*. The ***HR Processing*** component is only used to process *EmpowHR* agency employees who have a job and position in *EmpowHR*. If the person was a contingent worker, the record will not be accessible through the ***HR Processing*** component. In order to hire the person as an *EmpowHR* agency Federal employee, the user must add a new employment instance. For more information on this topic, see New Employment Instance USF.

Person Model allows the user to perform the following functions:

- Create a person
- Provide a person checklist
- Create organizational relationships
- Create worker organizational relationships and instances
- Provide additional assignment or new instance option
- Provide instance dates versus assignment dates
- Promote an assignment to an instance
- Review a person's organizational relationships

This section includes the following topics:

Add A Person

The Add a Person component allows the user to add people in the system.

For more information see:

[Adding a Person]

[Add a Name]

[Add Address Detail]

[Add Address]

[Establishing an Organizational Relationship]

[Search for Matching Persons]

Adding a Person

The Add a Person component allows the user to add people into the system. It will enable the user to add people with jobs (employees, contingent workers, and persons of interest with job data), as well as persons of interest without job data. A person ID is assigned automatically, which allows the system to generate IDs sequentially as new people are added.

Note: Prior to adding a new person, the user should verify whether the person being added exists in the system. For more information on performing this task, see **Search for Matching Persons**.

To add a person:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***Add A Person*** component. The Add A Person tab page (**Figure 1**) is displayed.

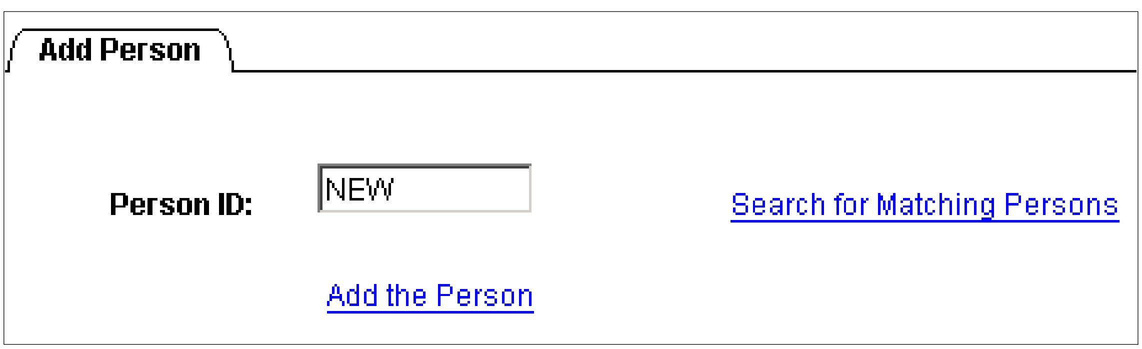


Figure 1. Add A Person tab page

5. Complete the field as follows:

Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as `New` until the record is saved.

6. Click the ***Add the Person*** link. The Biographical Details tab - Add A Person(**Figure 2**) is displayed.

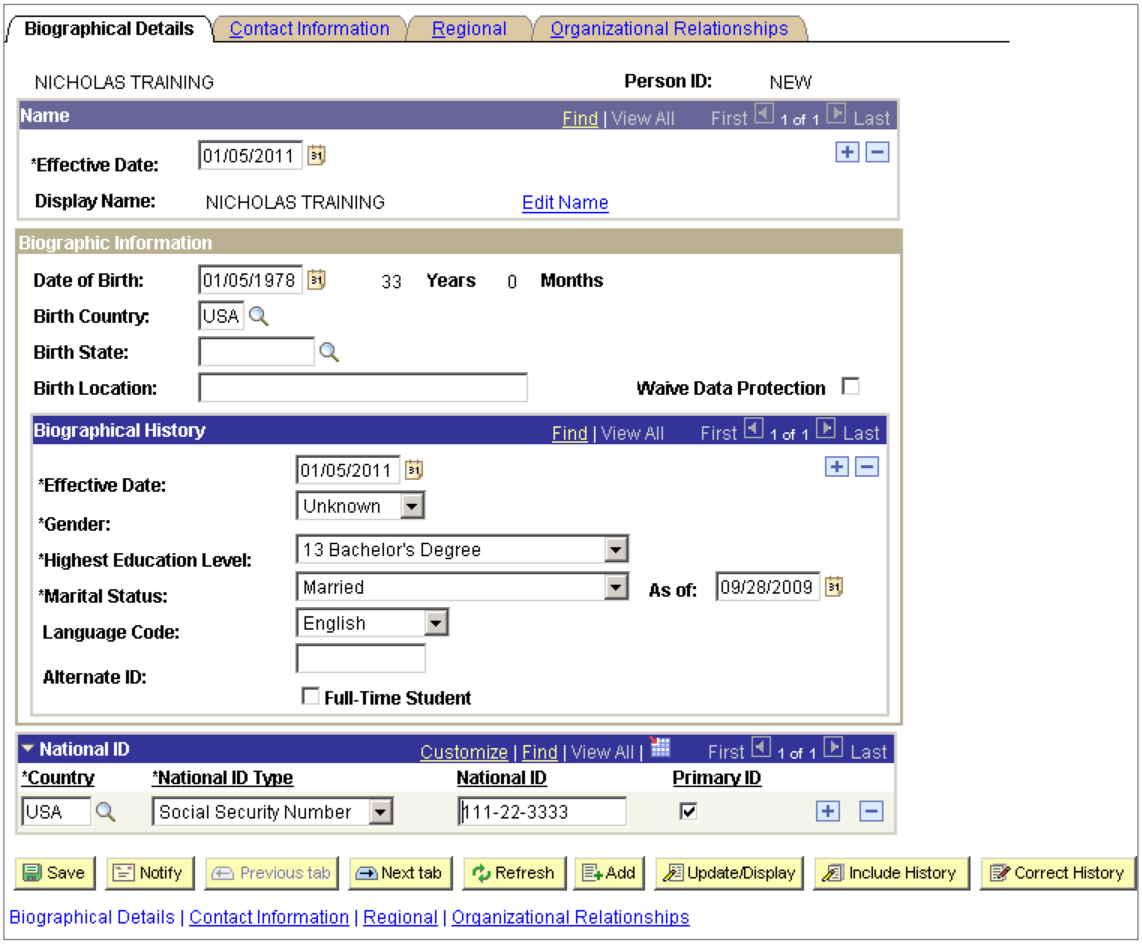


Figure 2. Biographical Details tab - Add A Person page

7. Complete the fields as follows:

Name	
Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as `New` until the record is saved.
Effective Date	Enter the effective date of the action or select a date by clicking the calendar icon. The date entered or selected will be populated in the PAR section.
Format Type	This field defaults to `English`. To change, select a format type from the drop-down list.
Display Name	This field is populated with data entered from the ***Add Name*** link. See field instructions for Add a Name. The name entered on this link will be populated in the PAR section. **Note:** The Add a Name link becomes the Edit Name link if the person's name has been added.
Biographical Information	

Date of Birth	Enter the person's date of birth or select a date by clicking the calendar icon. The calculated age is displayed to the right of the field. If this field is left blank, a warning message appears when the record is saved. The date of birth is not required; however, this information is used to calculate a person's age in some tasks, such as the expected retirement date, based on the person's age. The date entered or selected will be populated in the PAR section.
Birth Country	Enter the birth country or select a country by clicking the search icon. Based on the selected country, the system may display additional fields. The birth country entered or selected will be populated in the PAR section.
Birth State	Enter the birth state or select a state by clicking the search icon. The birth state entered or selected will be populated in the PAR section.
Birth Location	Enter the birth location. Usually a city, town, or village. The birth location entered will be populated in the PAR section.
Waive Data Protection	Check this box if applicable. **Note:** This field is not applicable for Federal users.
Biographical History	
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Gender	Select the applicable gender from the drop-down list. Valid values are **`Male`**, **`Female`**, and **`Unknown`**. The gender selected in this field will be populated in the PAR section.
Highest Education Level	Select the applicable education level from the drop-down list. The Education level selected in this field will be populated for Federal employees in the PAR section.
Marital Status	Select the applicable marital status from the drop-down list.
As Of	Enter the date or select a date by clicking on the calendar icon.
Language Code	Select the person's native or preferred language from the drop-down list. **Note:** Do not use this field to record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages.
Alternate ID	Enter the alternate ID if the use of a second type of ID is applicable.
Full-Time Student	Check this box if the person is a full-time student.
National ID	
Country	Select the country from the drop-down list that issued the worker's national ID.
National ID Type	This field defaults to Social Security Number and cannot be changed.

National ID	Enter the Social Security Number. The Social Security Number entered here will be populated in the PAR section.
Primary ID	Check this box if this ID is the person's primary ID. If this is the only data row for this person, the box is checked by default.

8. Select the Contact Information tab. The Contact Information tab - Add A Person page (**Figure 3**) is displayed.

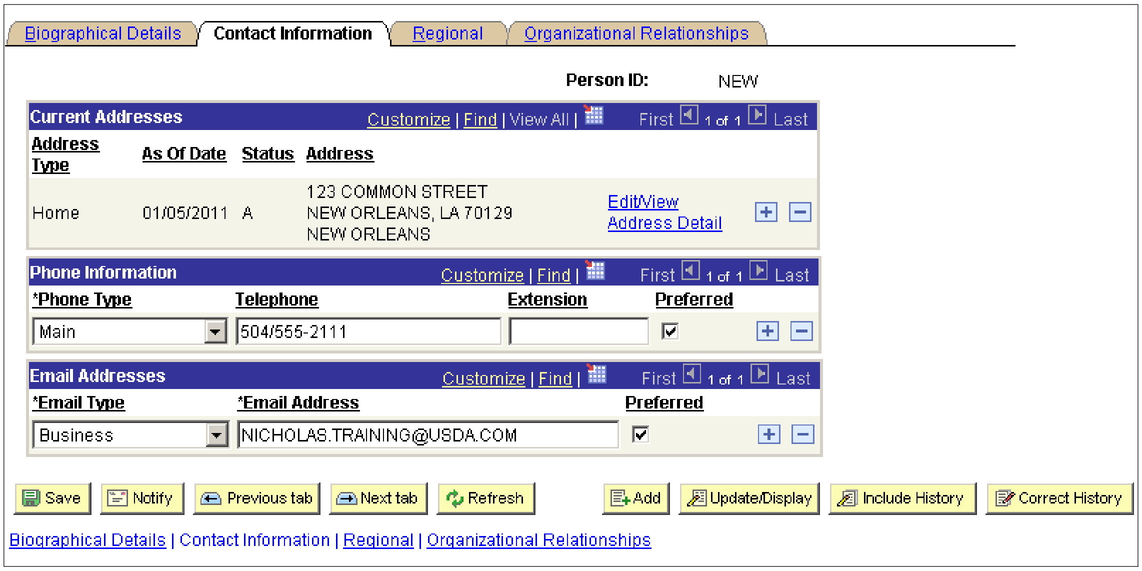


Figure 3. Contact Information tab - Add A Person page

9. Complete the fields as follows:

Current Addresses	
Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as `New` until the record is saved.
Address Type	Select the type of address that appears in this row. The field is populated with `Home` for the first address entered. Click **+** to select additional address types and add additional addresses. **Note:** The data entered for the home and mailing address for Federal employees will be populated in the PAR section.
As Of	This field is populated with the information entered from the ***Add Address Detail*** link. See field instructions for **Add Address Detail**.
Status	This field is populated with the information entered from the ***Add Address Detail*** link. See field instructions for **Add Address Detail**.
Address	This field is populated with the information entered from the ***Add Address Detail*** link. See field instructions for **Add Address Detail**.
Phone Information	

Phone Type	Select the applicable phone type that corresponds with the telephone number. Select `Main` to designate a phone number as the individual's primary contact number. The phone type selected in this field will be populated in the PAR section.
Telephone	Enter the telephone number. The telephone number entered in this field will be populated in the PAR section.
Extension	Enter the extension if applicable. The extension data entered here will be populated in the PAR section.
Preferred	Check this box if this is the person's preferred phone number. If this box is checked, it will be populated next to the applicable phone information in the PAR section.
Email Addresses	
Email Type	Select the email type from the drop-down list. Click **+** to select additional email address types and add additional email addresses.
Email Address	Enter the email address.
Preferred	Check this box if this is the person's preferred email address.

10. Select the Regional tab. The Regional tab - Add A Person page (**Figure 4**) is displayed.

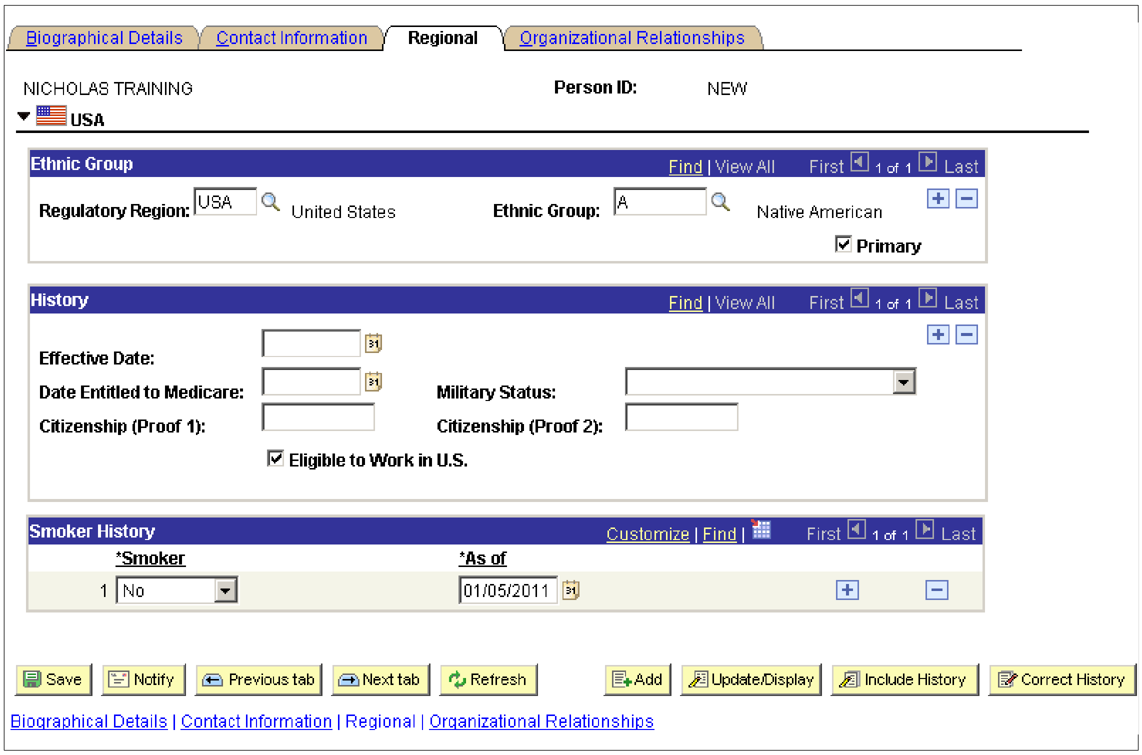


Figure 4. Regional tab - Add A Person page

11. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved.
Ethnic Group	
Regulatory Region	Enter the regulatory region or select a region by clicking the search icon.
Ethnic Group	Enter the ethnic group or select a group by clicking the search icon. The description is populated on the right. The ethnic group entered or selected will be populated in the ERI Code field of the PAR section.
Primary	Check this box if applicable.
Effective Date	Enter an effective date or select a date by clicking on the calendar icon.
Date Entitled To Medicare	Enter a date or select a date by clicking on the calendar icon on which this person is entitled to receive Medicare coverage.
Military Status	Select a military status from the drop-down list. The military status selected will be populated in the PAR section.
Citizenship (Proof 1)	Enter the first form of identification (for example: passport, Social Security card, etc.) to prove U.S. citizenship.
Citizenship (Proof 2)	Enter the second form of identification (for example: passport, Social Security card, etc.) to prove U.S. citizenship.
Eligible To Work In U.S.	Check this box if the person is eligible to work in the U.S.
Smoker	Select the applicable answer from the drop-down list. The valid values are **`No`** and **`Yes`**.
As Of	Enter the applicable date or select a date by clicking on the calendar icon on which the person started smoking.

12. Select the Organizational Relationships tab. The Organizational Relationships tab - Add A Person page (**Figure 5**) is displayed.

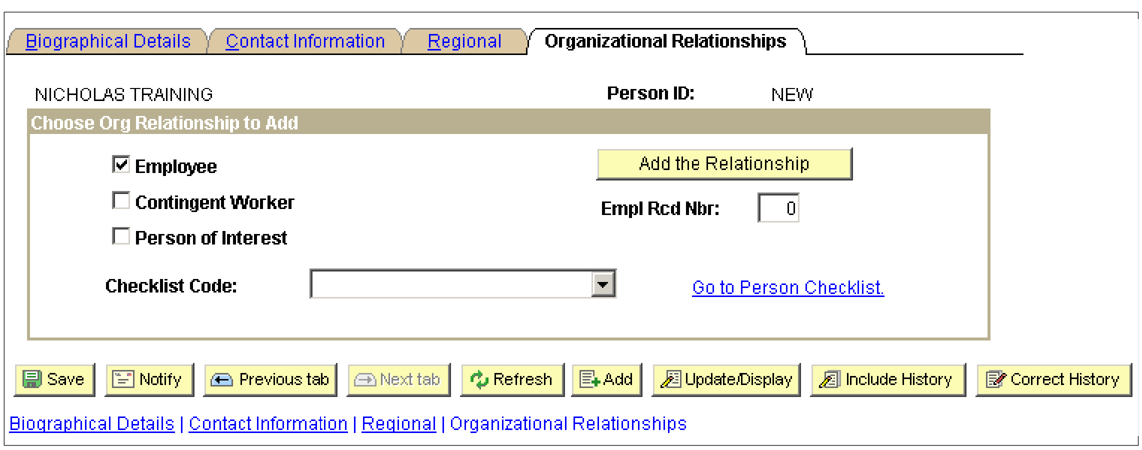


Figure 5. Organizational Relationships tab - Add A Person page

13. At this point you must establish the organizational relationship of the new person. To establish the organizational relationship, see Establishing an Organizational Relationship.

Note: If a person is created in the system and saved at this point, without clicking **Add the Relationship**, the data will not be saved and an error message will appear instructing the user to complete the organizational relationship.

Step	Description
Check the ***Employee*** box	To establish an employee relationship. For more information, see **Employee**.
Check the ***Contingent Worker*** box	To establish a contingent worker relationship. For more information, see **Contingent Worker**.
Check the ***Person of Interest*** box	To establish a person of interest relationship. For more information, see **Person Of Interest with Job Data** or **Person of Interest without Job Data**.

Add a Name

Add Name:

1. On the Biographical Details tab - Add A Person (**Figure 2**) click the ***Add Name*** link. The Edit Name page (**Figure 6**) is displayed.

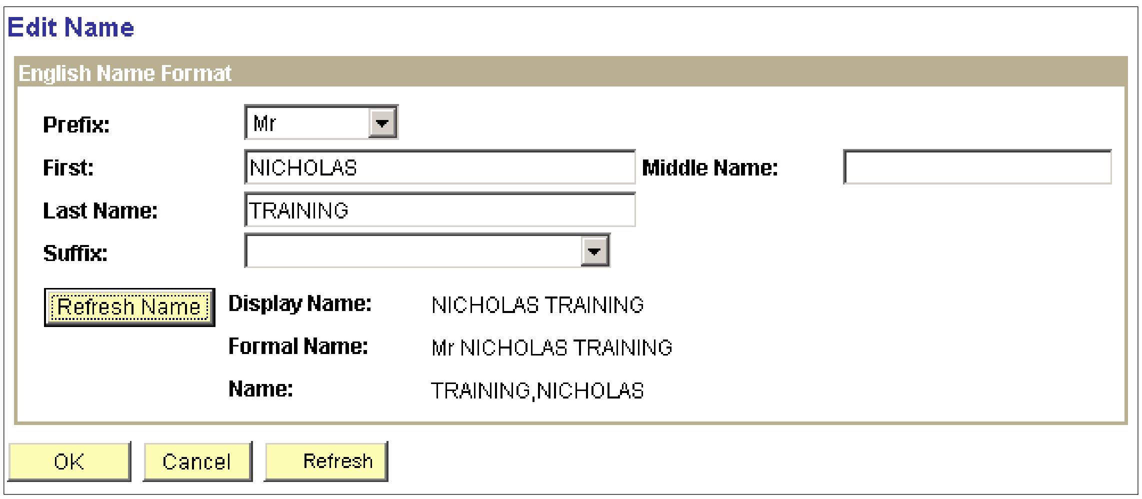


Figure 6. Edit Name page

2. Complete the fields as follows:

English Name Format	
Prefix	Select the applicable prefix from the drop-down list.
First Name	Enter the person's first name.
Middle Name	Enter the person's middle name.
Last Name	Enter the person's last name.
Suffix	Select the applicable suffix from the drop-down list.
Display Name	This field is populated with the person's information entered in the fields above after clicking **Refresh**.

Formal Name	This field is populated with the person's information entered in the fields above after clicking **Refresh**.
Name	This field is populated with the person's information entered in the fields above after clicking **Refresh**.

3. At this point the following options are available:

Step	Description
Click **OK**	To accept the new data entered. The Biographical Details tab - Add a Person page (**Figure 2**) is displayed.
Click **Cancel**	To cancel the action.
Click **Refresh**	To refresh the page. The information entered is displayed in the corresponding fields.

Add Address Detail

Adding Address Detail:

1. On the Contact Information tab - Add A Person page (**Figure 3**) click the ***Add Address Detail*** link. The Address History page (**Figure 7**) is displayed.

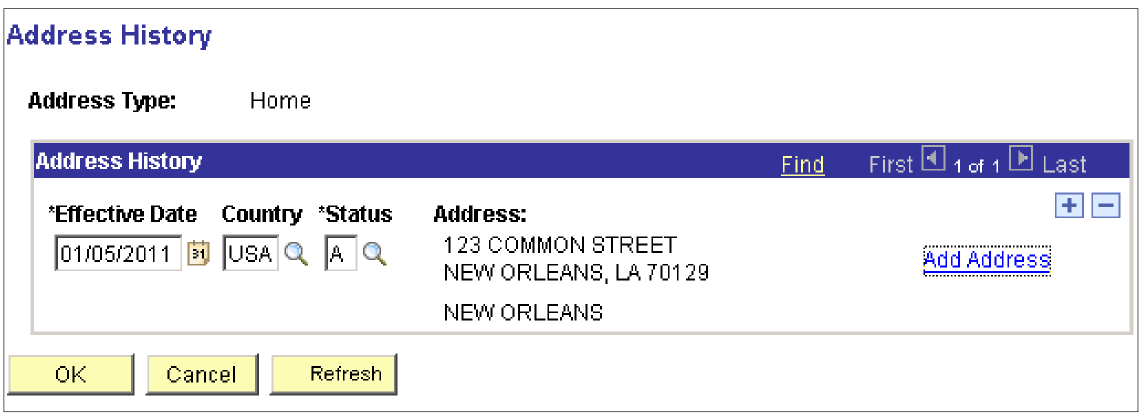


Figure 7. Address History page

2. Complete the fields as follows:

Address Type	This field is populated with the type of address.
Address History	
Effective Date	Enter the effective date or select a date by clicking on the calendar icon.
Country	Enter the country or select a country by clicking on the search icon.
Status	Enter the status or select a status by clicking on the search icon.
Address	This field is populated with information from the ***Add Address*** link. For more information, see **Add Address** for more information.

3. At this point the following options are available:

Step	Description
Click **OK**	To accept the new data entered. The Contact Information tab - Add a Person page (**Figure 3**) is displayed.
Click **Cancel**	To cancel the action.
Click **Refresh**	To refresh the page.

Add Address

Add Address:

1. On the Address History page (**Figure 7**) click the ***Add Address*** link. The Edit Address page (**Figure 8**) is displayed.

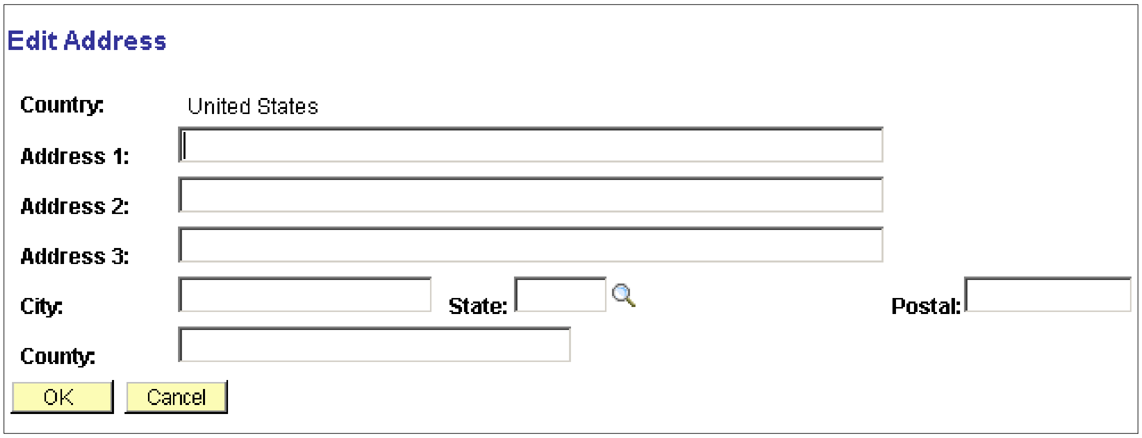


Figure 8. Edit Address page

2. Complete the fields as follows:

Country	This field is system populated.
Address 1	Enter the first line of the address.
Address2	Enter the second line of the address if applicable.
Address 3	Enter the third line of the address if applicable.
City	Enter the city.
State	Enter the state or select a state by clicking on the search icon.
Postal	Enter the postal code.
County	Enter the county.

3. At this point the following options are available:

Step	Description
Click **OK**	To accept and save the new data entered. The Address History page (**Figure 7**) is displayed.
Click **Cancel**	To cancel the action.

Establishing an Organizational Relationship

Only one organizational relationship can be selected when creating the Personal Data record. Additional relationships can be created directly from the New Employment Instance, New Contingent Worker Instance, Add Person of Interest Job, and Add a POI type to a person components.

If a person is created without a job data record or POI type record, the system will save the person as a POI without a job with a POI Type of Unknown. When a record is created and saved for that person on the Add an Employment Instance component, Add a Contingent Worker component, or Add a POI Instance component, the system will delete the Unknown POI without job instance for that person.

For more information on establishing an organizational relationship, see:

Employee
Contingent Worker
Person of Interest with Job Data
Person of Interest without Job Data

Employee

An employee organizational relationship is established when the relationship of the person who is hired provides services to an organization on a regular basis in exchange for compensation. This person does not provide these services as part of an independent business.

To Add an Employee:

1. On the Organizational Relationships tab - Add A Person page (**Figure 5**), check the ***Employee*** box.
2. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when adding a new person. The value will display as **`New`** until the record is saved.
Empl Rcd Nbr	This field is populated with the next employee record number available for the person.
Checklist Code	Select the applicable checklist code from the drop-down list to apply a checklist to the person being added. The valid values for this field will vary based on the user's agency and access level.

3. Click **Add the Relationship** to save the data and establish the new person's organizational relationship. For more information on Personnel Action Request (PAR) Processing, refer to Chapter 17, Section 5.
4. After the appropriate relationship data is entered and saved, the Organizational Relationships tab - Add A Person page (**Figure 5**) is displayed. Click the ***Go To Person Checklist*** link to apply a

checklist to the person being added. The Person Checklist page is displayed. For more information, see **Person Checklist**.

Contingent Worker

A contingent worker organizational relationship is established when the relationship of the person who provides services to an organization is under terms specified in a contract on a non-permanent basis.

For more information on adding a contingent worker, see:

Adding a Contingent Worker

Employment Data

Earnings Distribution

Benefits Program Participation

Adding a Contingent Worker

To add a Contingent Worker:

1. On the Organizational Relationships tab - Add A Person page (**Figure 5**), check the ***Contingent Worker*** box.

2. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when adding a new person. The value will display as **New** until the record is saved.
Empl Rcd Nbr	This field is populated with the next employee record number available for the person.
Checklist Code	Select the applicable checklist code from the drop-down list to apply a checklist to the person being added. The valid values for this field will vary based on the user's agency and access level.

3. Click **Add the Relationship**. The Work Location tab - Contingent Worker page (**Figure 9**) is displayed.

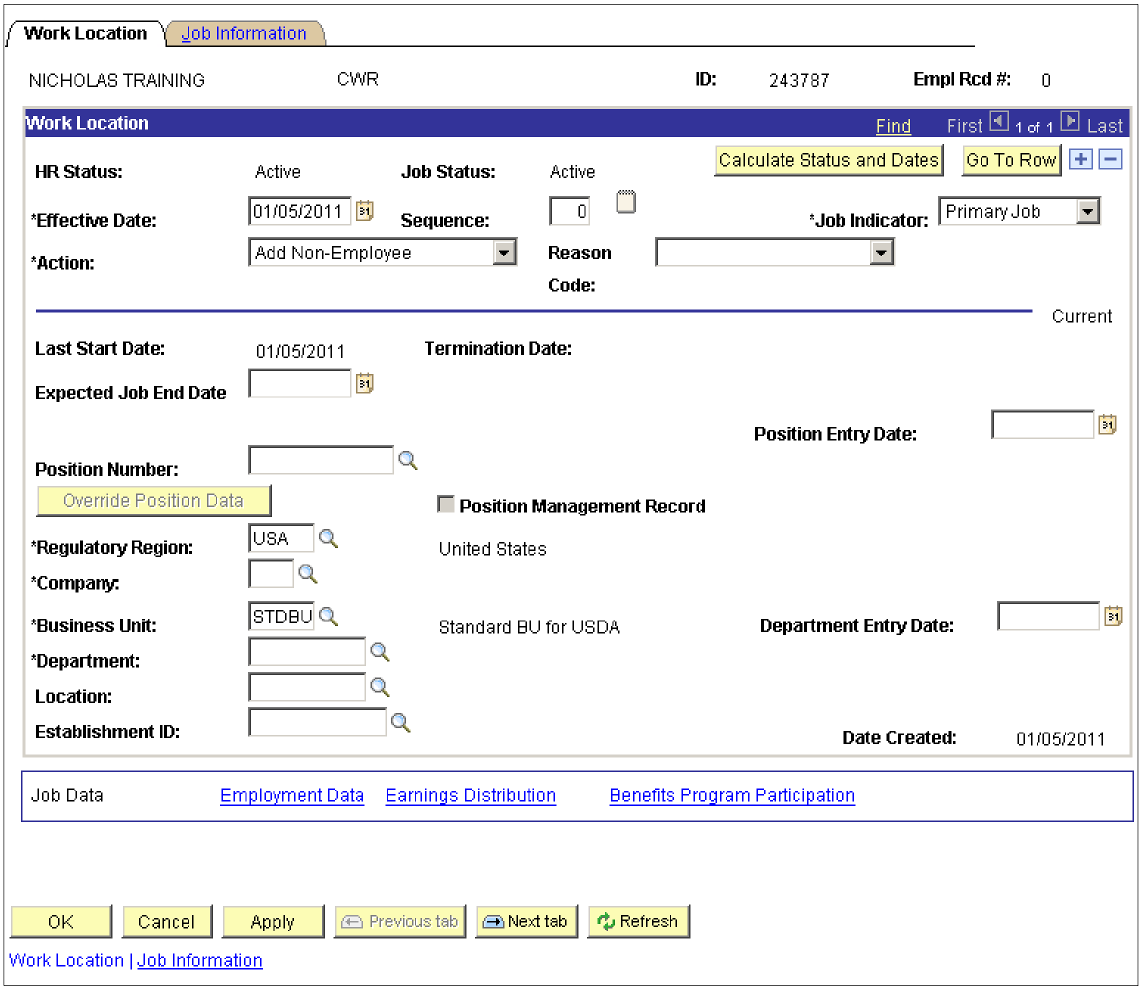


Figure 9. Work Location tab - Contingent Worker page

4. Complete the fields as follows:

Name	This field is populated with the person's name.
Person	This field displays the person's relationship to the organization.
ID	This field is system populated.
Empl Rcd #	This field is system populated with the employee record number for the person.
Work Location	
HR Status	This field is system populated.
Job Status	This field is system populated.
Effective Date	Enter the effective date or select a date by clicking the calendar icon. When a new instance with the action of Hire is added, the effective date entered becomes the hire and original hire date.

Sequence	Use this number to track multiple administrative actions that occur on the same day. The default value is **`0`**, the correct number for new instances.
Job Indicator	Select the applicable job indicator from the drop-down list. The valid values are **`Primary Job`**, **`Secondary Job`**, and **`Not Applicable`**. This field is used to process people with more than one organizational instance in a single organizational relationship.
Action	Select the action requiring you to create or modify this record from the drop-down menu. The system displays a default value when a new employment, contingent worker, or POI instance is created.
Reason	Select the reason requiring you to create or modify this record from the drop-down menu. The system displays a default value when a new employment, contingent worker, or POI instance is created. The valid values for this field will vary based on the user's agency and access level.
Last Start Date	Enter the most recent start date for this organizational instance.
Termination Date	This field is populated with the day before the termination effective date.
Expected Job End Date	Enter the expected job end date for this job or select a date by clicking on the calendar icon. If this job is a temporary assignment and a date is not entered here, a Temporary Assignment without End Date report can be ran to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold. The system displays the day before the termination effective date as the termination date.
Position Entry Date	This field is populated with the effective date based on the position number entered for this person. The data can be overridden by clicking **Override Position Data**.
Position Number	Enter the position number or select a number by clicking on the search icon. The available entry or selection of the position number is dependant on the person type relationship. Define positions in the Position Informantion component. Completing this field allows the system to complete position-related fields in the Job Data component with default data from the Add/Update Position Infor Component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry. A warning message will appear if a person is assigned to a position that is already filled and if the new appointment exceeds the maximum head count for that position. The system calculates the head count and displays the appropriate indicator in the Open//Filled field in the Add/Update Position Info component when assignments are changed.
Position Management Record	This box is selected when changes are made to fields in the Add/Update Position info component that initiate a system update of fields here. When this box is selected it indicates that the system inserts a data row on the Job Data pages.

Regulatory Region	This field is populated based on the regulatory region specified for the position this person is associated with. The data can be overridden by clicking **Override Position Data**. If the person is not assigned to a position, this field is populated with the regulatory region for the person, based on the user preferences. This entry can be overridden.
Company	This field is populated based on the company specified for the position associated with this person and cannot be modified. The data can be overridden by clicking **Override Position Data**. This field is populated with a default company code if the person is not assigned to a position, but a company is assigned to a department in the department table. If no company is designated on the Department table, enter a company or select a company by clicking the search icon.
Business Unit	This field is populated based on the business unit specified for the position associated with this person and cannot be modified. The data can be overridden by clicking **Override Position Data**. This field is populated with a default business unit if the person is not assigned to a position. The default can be overridden.
Department Entry Date	This field is system populated.
Department	This field is populated based on the position number entered.
Location	This field is populated based on the position number entered.
Establishment ID	Enter the establishment ID or select an ID by clicking on the search icon.
Date Created	This field is system populated.

5. Click **Calculate Status and Dates** to calculate the person's HR, job, or payroll status and the employment dates so that the changes can be reviewed before the component is saved. This button is displayed when changes are made to the effective date or one or the status fields.

6. Click **Override Position Data** to enter exceptions to the default position data for this person. This opens up the unavailable fields, including Job Code and Depart, and entries in those fields can be overridden. For example, the worker might have a higher salary grade than the standard grade that is associated with the position. When Override Position Data is clicked, the button becomes Use Position Data, and vice versa. This button is available only on new rows of data.

   Note: If the defaults for position-related data are overridden, the employee data must be maintained manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless Use Position Data is clicked.

7. Click the ***Job Information*** tab. The Job Information tab - Contingent Worker page (**Figure 10**) is displayed.

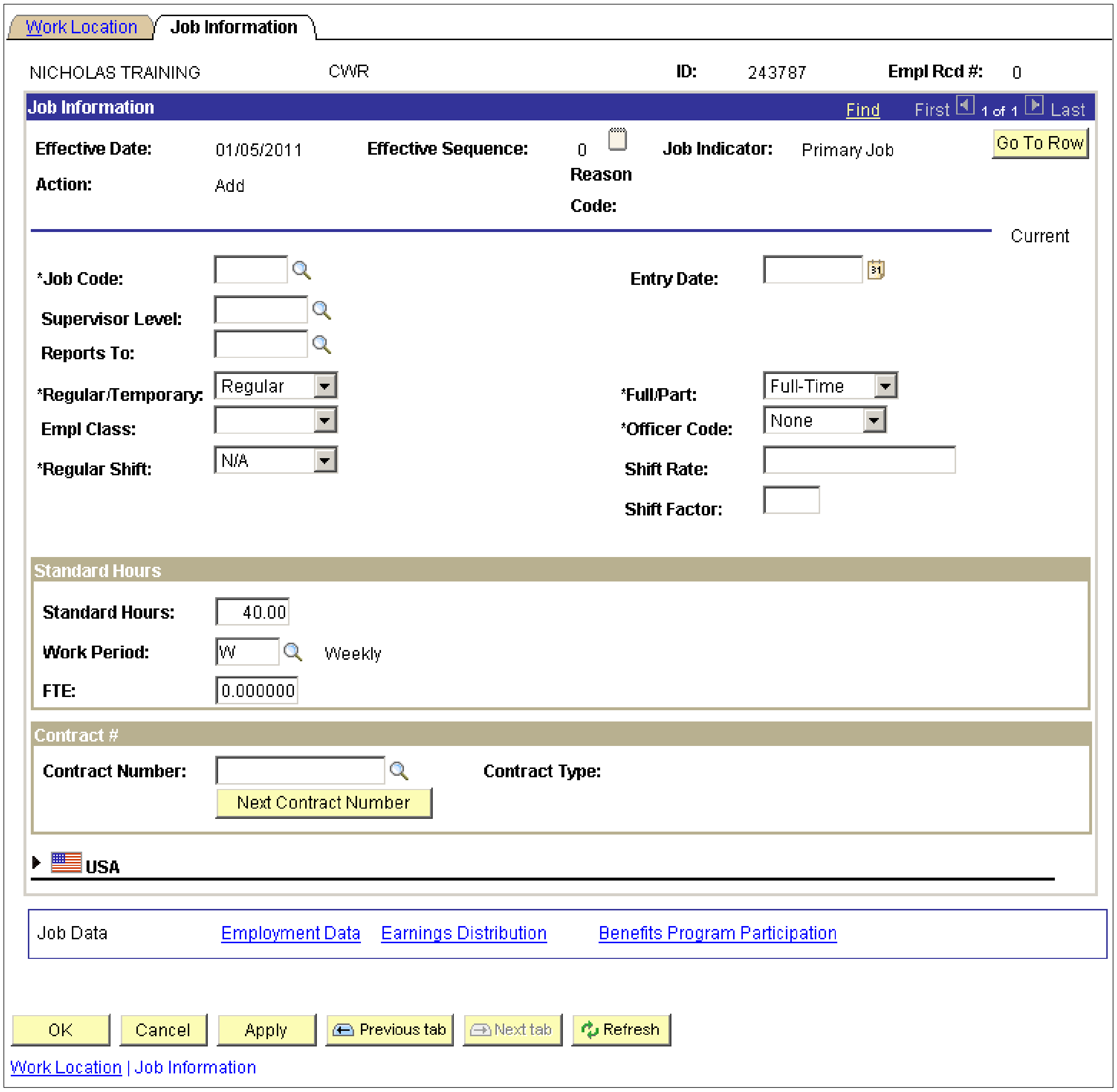


Figure 10. Job Information tab - Contingent Worker page

8. Complete the fields as follows:

Name	This field is populated with the person's name.
Person	This field displays the person's relationship to the organization.
ID	This field is system populated.
Empl Rcd #	This field is populated with the employee record number for the person.
Job Information	
Effective Date	This field is populated based on the data selected on the Work Location tab (**Figure 9**).
Effective Sequence	This field is system populated.

Job Indicator	This field is populated based on the data selected on the Work Location tab (**Figure 9**).
Action	This field is populated based on the data selected on the Work Location tab (**Figure 9**).
Reason	This field is populated based on the data selected on the Work Location tab (**Figure 9**).
Job Code	This field is populated based on the job code specified for the position associated with this person, the system enters a default job code and cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**). If the person is not assigned to a position, enter the job code or select a code by clicking the search icon. **Note:** If this person is attached to a labor agreement on the Job Labor tab and that labor agreement is associated with job codes, a job code that is valid for the labor agreement must be selected.
Entry Date	This field is populated with the date on which the person is first assigned to this job code. If you are using position management, this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**).
Supervisor Level	Supervisor levels are a class of positions that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier. If a specified supervisor level of this position is associated with this person, the system enters a default supervisor level and this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**). If the person is not assigned to a position, enter the supervisor level or select a level by clicking the search icon.
Reports To	This field displays the position number, title, and name of the manager associated with this position. If a specified “reports to” number for this position is associated with this person, the system enters a default value and this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**). If the person is not assigned to a position and is assigned a reports to ID to a department in the Department Table, a default reports to ID appears. If the person is not assigned to a position, enter the reports to ID or select an ID by clicking the search icon.
Regular/Temporary	This field is populated based on the position number entered or selected and cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**).
Full/Part	This field is populated based on the position number entered or selected and cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**). If the person is not assigned to a position, select the applicable value from the drop-down menu. The valid values are **`Full-time`** and **`Part-time`**.
Empl Class	Select the employee class from the drop down list.

Officer Code	Select the Officer Code from the drop down list.
Regular Shift	This field is populated based on the position number associated with the person and cannot be modified. The data can be overridden by clicking **Override Position Data** on the Work Location tab (**Figure 9**). Select the appropriate shift if the worker is working shifts. If the worker does not work shifts, leave the Shift Rate and Factor fields blank. The default value is **N/A**.
Shift Rate	Enter the Shift Rate information.
Shift Factor	Enter the Shift Factor information.
Standard Hours	
Standard Hours	Enter the number of standard hours.
Work Period	Enter the Work Period or select a work period by clicking on the search icon.
FTE	Enter the FTE information.
Contract #	
Contract Number	Enter the contract number or select a number by clicking the search icon.
Contract Type	This field is populated information that corresponds with contract number entered or selected.
USA	
FLSA Status	Select the FLSA status from the drop down list. The valid values are **Exmpt** and **Nonexempt**. This field defaults to **(Invalid Value)**.
EEO Class	Select the EEO class from the drop down list.
Work Day Hours	Enter the work day hours.

9. At this point the following options are available:

Step	Description
Click ***Employment Data***	To add employment data. For more information, see **Employment Data**.
Click ***Earnings Distribution***	To add earnings data. For more information, see **Earnings Distribution**.
Click ***Benefits Program Participation***	To add benefits data. For more information, see **Benefits Program Participation**.

Employment Data

This link allows users to enter the person's employment information.

To enter employment Data:

1. Click the ***Employment Data*** link at the bottom of any tab on the Contingent Worker page. The Employment Data tab - Add a Person page (**Figure 11**) is displayed.

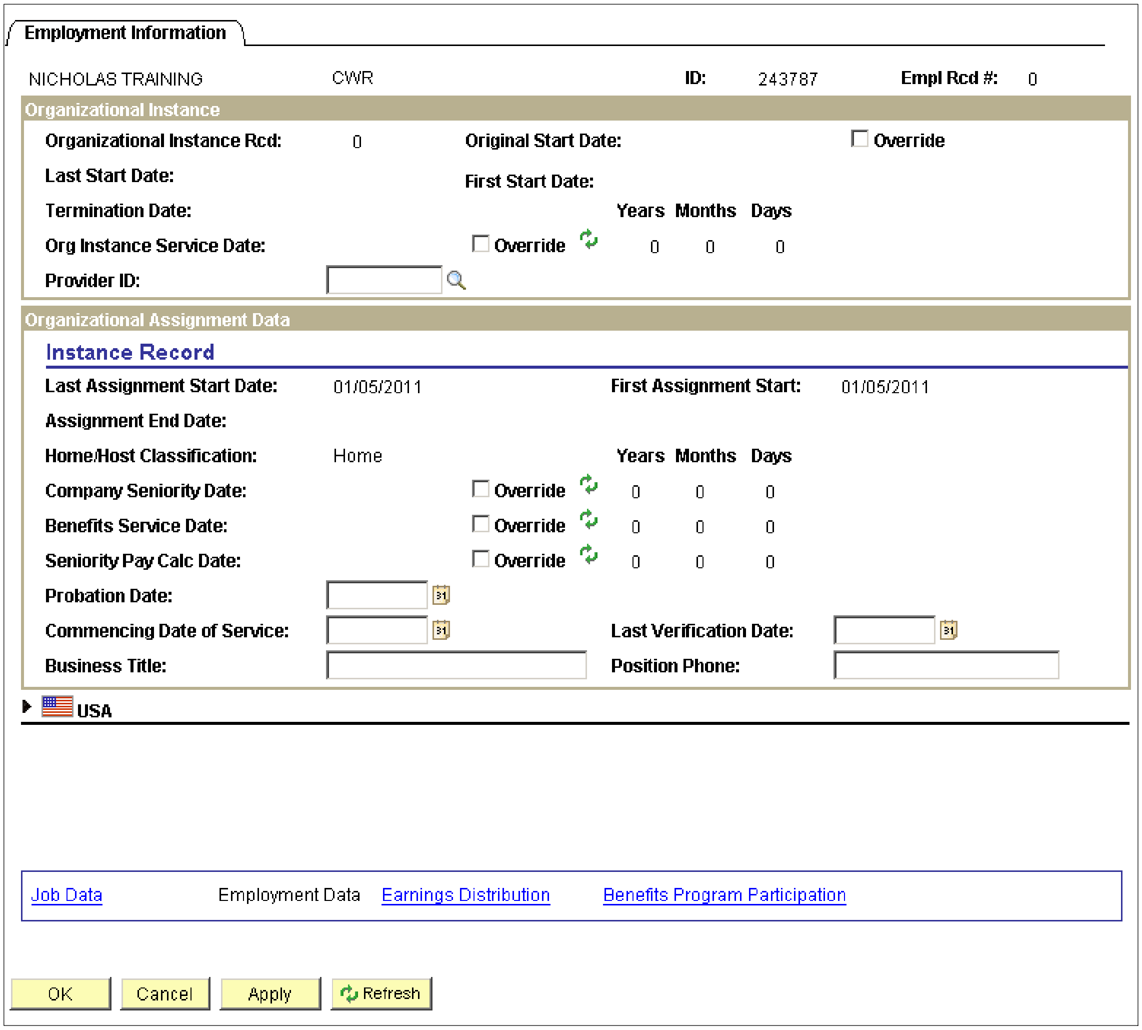


Figure 11. Employment Data tab - Add a Person page

2. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person	This field displays the person's relationship to the organization.
Person ID	This field is populated with the person ID assigned to the person.
Empl Rcd #	This field is populated with the employee record number.
Organizational Instance	
Organizational Instance Rcd	This field is populated with the organizational instance record number. The number of the instance associated with the job data record. The organizational instance record number is the same as the ERN of the controlling instance.

Original Start Date	This field is populated with the system date on which the job data record is first created in the system. This date is not the effective date of the first job data record or the effective date of the job data row with the action of **HIR**. This date can be overridden to reflect an earlier start date, for example if the person has previously worked for the organization.
Override	Check this box if the original start date is modified to reflect an earlier start date than the system populated date.
Last Start Date	This field is populated with the most recent start date for the current organization instance. The system populates this field originally with the effective date of the controlling instance's job data row with the action of **HIR** and then refreshes it with the effective date of job data rows with the actions **REH** (for employees) or **RNW** (for contingent workers). **Note:** This date is different from the first start date if the organization instance has been inactive and then reactivated.
First Start Date	This field is populated with the first start date for the current organization instance. The system populates this field with the effective date of the first job data row with the action of **HIR** (for employees) or **ADD** (for contingent workers) from the controlling instance. **Note:** This date is used as the hire date in reports. This date is not refreshed unless a new row in the controlling instance with one of these actions is added. This would only be necessary if the hire date needs to be reset.
Termination Date	This field is populated with the effective date of the controlling instance's job data row with the action of **TER** or **COM**, if applicable. If a person's controlling instance is rehire or renew, the system clears this field.
Org Instance Service Date	This field is populated with the system date on which the current job data record was created in the system. This date can be earlier than the effective date of the firs job data record or the effective date of the job data row with the action of **HIR**. This date can be overridden to reflect an earlier service date. For example if the person has previously worked for the organization. The system calculates the number of years, months and days of service for the person.
Override	Check this box if the organizational instance service date is modified to reflect an earlier service date than the system populated date.
Years	This field is populated with the amount of years of service for the person.
Months	This field is populated with the amount of months of service for the person.
Days	This field is populated with the amount of days of service for the person.
Provider ID	Enter the provider ID or select and ID by clicking the search icon.
Organizational Assignment Data **Instance Record**	

Last Assignment Start Date	This field is populated with the most recent start date for the current assignment. The system populates this field with the effective date of the job data row with an action that reactivates the assignment. This date is different from the first assignment start date if this assignment has been inactive and then reactivated.
First Assignment Start	This field is populated with the first start date for the current assignment. The system populates this field with the effective date of the first job data row with an action that activates the assignment.
Assignment End Date	This field is populated with the effective date of the job data row with the action of **`TER`** or **`COM`** , if applicable.
Home/Host Classification	This field applies to workers who are on assignments and identifies whether the current job is at the worker's home location of the assignment location. Select **`Home`** for a new hire.
Company Seniority Date	This field displays the company seniority date. This date can be modified by selecting the override box and then entering another company seniority date or selecting a date by clicking the calendar icon. Based on the date entered the system calculates the number of years, months, and days of seniority for the person.
Override	Check this box to override the company seniority date.
Years	This field is populated with the amount of years of seniority for the person.
Months	This field is populated with the amount of months of seniority for the person.
Days	This field is populated with the amount of days of seniority for the person.
Benefits Service Date	This field displays the date of service for a person. This date can be modified by selecting the override box and then entering another benefits service date or selecting a date by clicking the calendar icon. Based on the date entered the system calculates the number of years, months, and days of service for a person, including any credit for military leave or the total amount of time that the person works for multiple departments in the organization. This date is used to calculate benefits eligibility.
Override	Check this box to override the benefit service date.
Years	This field is populated with the amount of years of service for the person.
Months	This field is populated with the amount of months of service for the person.
Days	This field is populated with the amount of days of service for the person.
Seniority Pay Calc Date	This field displays the seniority pay calculation date. This date can be modified by selecting the override box and then entering the date the system should use to calculate seniority-based pay or selecting a date by clicking the calendar icon. Based on the date entered the system calculates the number of years, months, and days of seniority pay calculation for the person. **Note:** The system used the original start date as the default value.
Override	Check this box to override the seniority pay calculation date.
Years	This field is populated with the amount of years of seniority pay calculation for the person.

Months	This field is populated with the amount of months of seniority pay calculation for the person.
Days	This field is populated with the amount of days of seniority pay calculation for the person.
Probation Date	Enter the date the worker is placed on probation or select a date by clicking the calendar icon.
Commencing Date of Service	Enter the commencing date of service or select a date by clicking the calendar icon.
Last Verification Date	Enter the date the person verified his/her personal data in the system or select a date by clicking the calendar icon.
Business Title	This field is populated with the default title for the position number that is assigned to the person on the Work Location tab - Contingent Worker page (**Figure 9**).
Position Phone	This field is populated with the default phone number for the position number that is assigned to the person on the Work Location tab - Add a Contingent Worker page (**Figure 9**).
USA	
Owns 5% (or More) of Company	Check this box if applicable.
Appointment End Date	Enter the appointment end date or select a date by clicking the calendar icon.
Contract Length	Select a contract length from the drop-down menu.
Accrue Tenure Services	Check this box to activate the tenure accrual.
FTE for Tenure Accural	Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.
Service Calculation Group	Enter the Service Calculation Group that represents a group of employees who have the same calculation rules applied to their service accrual process or select a group by clicking the search icon.
FTE for Flex Service Accrual	Enter the FTE value to be used in prorating the worker’s accrued service.

Note: If you choose **OK**, you are returned to the Organizational Relationships tab - Add a Person page (**Figure 5**).

Earnings Distribution

This link allows users to distribute standard earnings for a person.

To enter employment Data:

1. Click the ***Earnings Distribution*** link at the bottom of any tab on the Contingent Worker page. The Job Earnings Distribution tab - Add a Person page (**Figure 12**) is displayed.

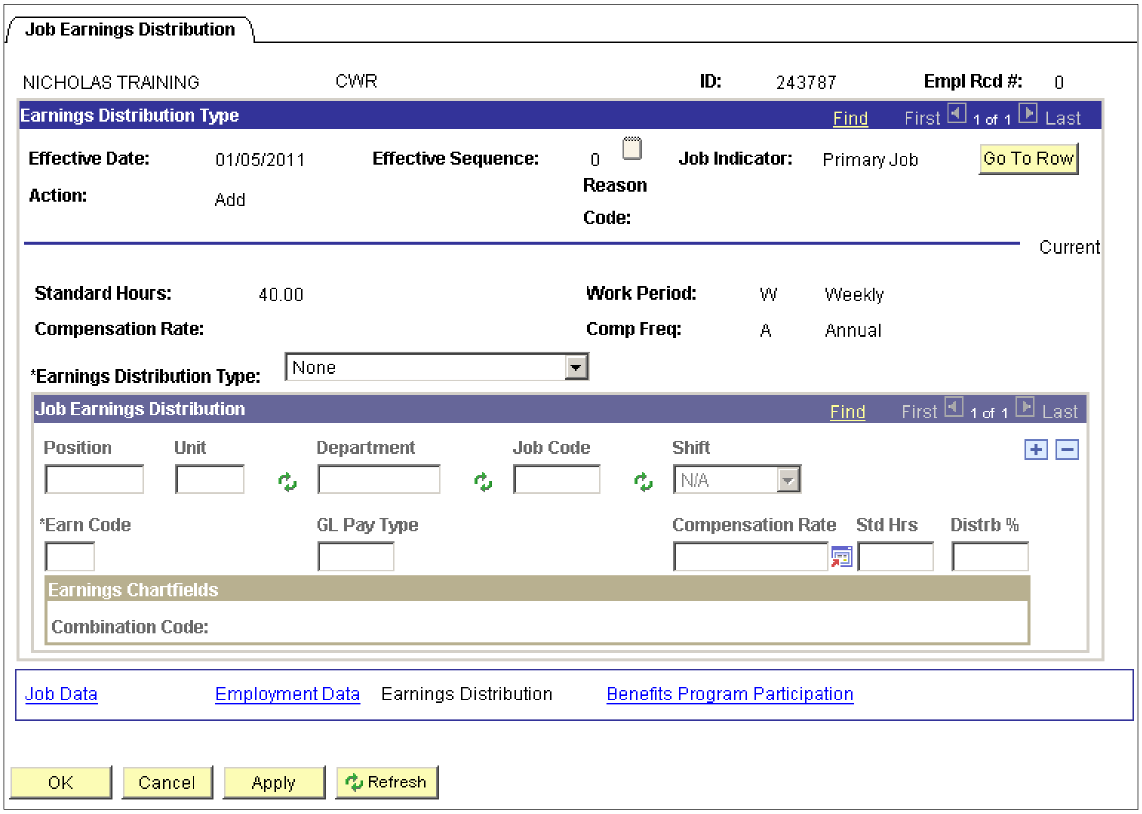


Figure 12. Job Earnings Distribution tab - Add a Person page

2. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person	This field displays the person's relationship to the organization.
Person ID	This field is populated with the person ID assigned to the person.
Empl Rcd #	This field is populated with the employee record number.
Earnings Distribution Type	
Effective Date	This field is populated with the effective date.
Effective Sequence	This field is populated with the effective sequence number.
Job Indicator	This field is populated with the job indicator.
Action	This field is populated with the action.
Reason	This field is populated with the applicable reason.
Standard Hours	This field is populated with the number of standard hours for the person.
Work Period	This field is populated with the work period of the person.

Compensation Rate	This field is populated with the person's compensation rate.
Comp Freq	This field is populated with the frequency of compensation for the person.
Earnings Distribution Type	Select an earnings distribution type from the drop-down menu.
Job Earnings Distribution	
Position	Enter the position number or select a number by clicking the search icon.
Unit	Enter the unit or select a unit by clicking the search icon.
Department	Enter the department or select a department by clicking the search icon.
Job Code	Enter the job code or select a code by clicking the search icon.
Shift	Select a shift from the drop-down list.
Earn Code	Enter the earn code or select a code by clicking the search icon.
GL Pay Type	Enter the GL pay type.
Compensation Rate	Enter the compensation rate or select a rate by clicking the calculator icon. This field is only available if the earnings distribution type is **`By Amount`**.
Std Hrs	Enter the number of standard hours. This field is only available if the earnings distribution type is **`By Hours`**.
Distrb %	Enter the distribution percent. This field is only available if the earnings distribution type is **`By Percent`**.
Earnings Chartfields	
Combination Code	This field is populated based the information entered from the ***Edit Chart fields*** link.

Note: If you choose **OK**, you are returned to the Organizational Relationships tab - Add a Person page (**Figure 5**).

3. Click the ***Edit Chart Fields*** link. The Chart Field Detail page (**Figure 13**) is displayed.

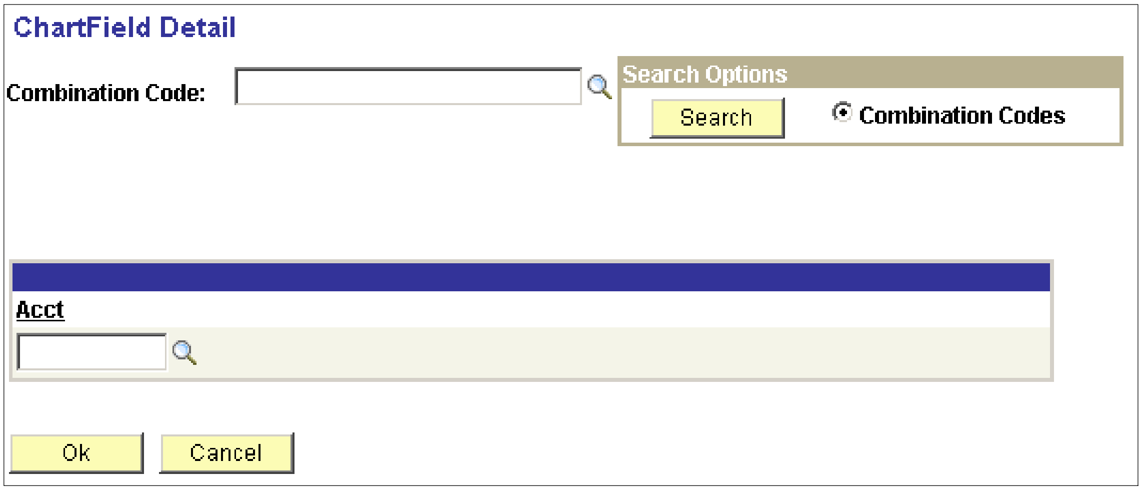


Figure 13. Chart Field Detail page

4. Complete the fields as follows:

Combination Code	Enter the combination code or select a code by clicking the search icon.
Acct	Enter the account or select and account by clicking the search icon.

5. At this point the following options are available:

Step	Description
Click **search**	To search for all accounts related to the combination code entered.
Click **OK**	To accept the entries and return to the Job Earnings Distribution tab - Add a Person page (**Figure 12**).
Click **Cancel**	To cancel the entries and return to the Job Earnings Distribution tab - Add a Person page (**Figure 12**).

Benefits Program Participation

This link allows users to enter the person’s benefit information.

To enter benefits program participation Data:

1. Click the ***Benefits Program Participation*** link at the bottom of any tab on the Contingent Worker page. The Benefits Program Participation tab - Add a Person page (**Figure 14**) is displayed.

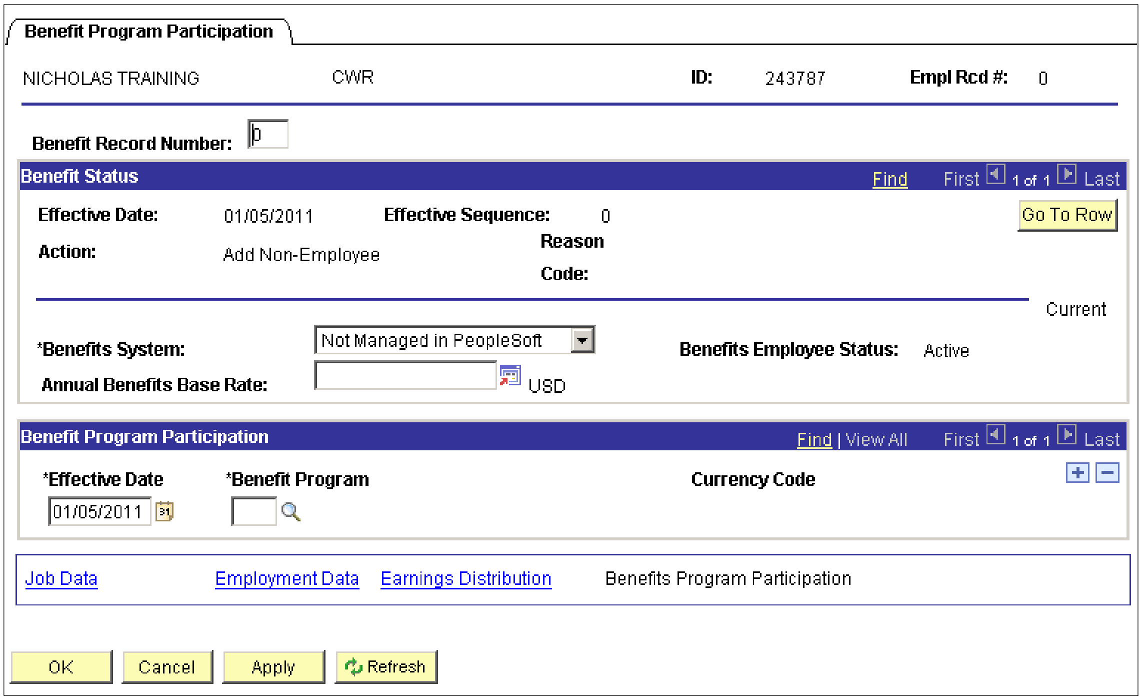


Figure 14. Benefits Program Participation tab - Add a Person page

1. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person	This field displays the person's relationship to the organization.
Person ID	This field is populated with the person ID assigned to the person.
Empl Rcd #	This field is populated with the employee record number.
Benefit Record Number	This field is populated with the benefit record number which is an identifier that links two or more jobs for benefits purposes. The value is set to **0** by the system. The value can be overridden to attach this job to a different benefit record number. The system clears the benefits program data and repopulates it with values that are attached to the benefit record number that is entered.
Benefit Status	
Effective Date	This field is populated with the effective date.
Effective Sequence	This field is populated with the effective sequence.
Action	This field is populated with the action selected on the Work Location tab - Contingent Worker page (**Figure 9**).
Reason	This field is populated with the reason selected on the Work Location tab - Contingent Worker page (**Figure 9**).

Benefits System	Select a benefits system from the drop-down menu. **Note:** Select **`Not Managed in PeopleSoft`** to filter out persons who have insufficient employment and job information to support benefit enrollment.
Benefits Employee Status	This field is populated with the benefit status of the employee.
Annual Benefits Base Rate	Enter the base rate of the annual benefits or select a rate by clicking the calculator icon.
Benefit Program Participation	
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Benefit Program	Enter the benefit program or select a program by clicking the search icon.
Currency Code	This field is populated with the code of the currency that is specified for the benefit program in the Benefit Program table.

2. At this point the following options are available:

Step	Description
Click **OK**	To accept the new data entered. The Organizational Relationships tab - Add a Person page (**Figure 5**) is displayed.
Click **Cancel**	To cancel the action.
Click **Apply**	To apply the new data. The Organizational Relationships tab - Add a Person page (**Figure 5**) is displayed.
Click **Refresh**	To refresh the page.

3. After the appropriate relationship data is entered and saved, the Organizational Relationships tab - Add a Person page (**Figure 5**) is displayed. Click the ***Go To Person Checklist*** link to apply a checklist to the person being added. The Person Checklist page is displayed. For more information see **Person Checklist**.

Person of Interest with Job data

A person of interest with job data organizational relationship is established when the person is of interest to the organization and has job data, but does not have an employee or a contingent worker relationship with the organization.

To add a Person of Interest with job data:

1. On the Organizational Relationships tab - Add A Person page (**Figure 5**), check the ***Person of Interest*** box.

2. Select the type of Person of Interest to be added. The valid values in this drop-down menu will vary based on the user's agency and access level.

3. Click **Add the Relationship**. The Work Location tab - Contingent Worker page (**Figure 9**) is displayed. For more information, see **Contingent Worker**.

4. After the appropriate relationship data is entered and saved, the Organizational Relationships tab - Add A Person page (**Figure 5**) is displayed. Click the ***Go To Person Checklist*** link to apply a

checklist to the person being added. The Person Checklist page is displayed. For more information see **Person Checklist**.

Person of Interest without Job Data

A person of interest organizational relationship is established when the person is of interest to the organization, but does not have an employee or a contingent worker relationship with the organization.

To Add a Person of Interest without job data:

1. On the Organizational Relationships tab - Add A Person page (**Figure 5**), check the ***Person of Interest*** box.

2. Select the type of Person of Interest to be added. The valid values in this drop-down menu will vary based on the user's agency and access level.

3. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved.
Empl Rcd Nbr	This field is system populated.
Checklist Code	Select the applicable checklist code from the drop-down menu to apply a checklist to the person being added. The valid values for this field will vary based on the user's agency and access level.

4. Click **Add the Relationship**. The Add Person of Interest tab - Person of Interest page (**Figure 15**) is displayed.

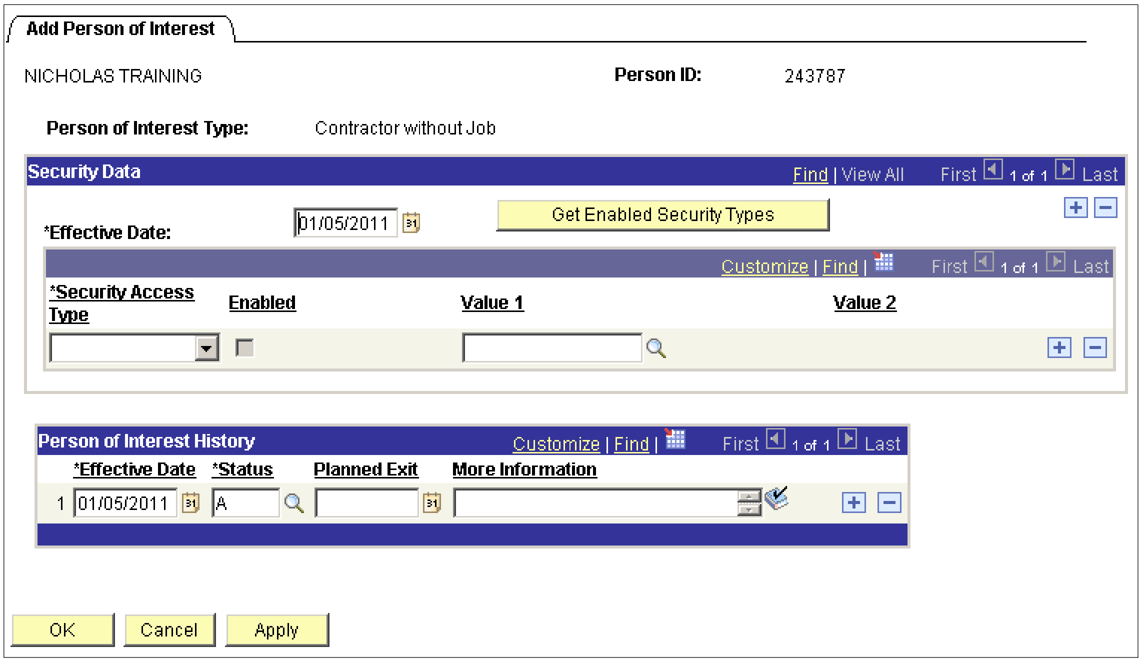


Figure 15. Add Person Of Interest tab - Person Of Interest page

5. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved.
Person Of Interest Type	This field is populated based on the person of interest type selected on the Organizational Relationships tab - Add A Person page (**Figure 5**).
Security Data	
Effective Date	Enter the effective date or select a date by clicking on the calendar icon.
Security Access Type	Select the security access type from the drop-down list. Valid value is **`Department ID`**.

OR

6. Click **Get Enabled Security Types**. All security access types are added and enabled.

Enabled	Check this box if applicable.
Value 1	Enter the value or select a value by clicking on the search icon. If the security access type **`Business Unit`** or **`Institution`** is selected, select the business unit or institution associated with this person for security purposes. If the security access type **`Location`** is selected, first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.
Value 2	Enter the Dept ID or select an ID by clicking on the search icon.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Enter the status or select a status by clicking on the search icon.
Planned Exit	Enter the planned exit date or select a date by clicking on the calendar icon.
More Information	Enter any additional information.

7. At this point the following options are available:

Step	Description
Click **OK**	To accept changes and return to the Add Person Of Interest tab - Person Of Interest page (**Figure 15**).
Click **Cancel**	To cancel action and return to the Add Person Of Interest tab - Person Of Interest page (**Figure 15**).
Click **Apply**	To apply changes and return to the Add Person Of Interest tab - Person Of Interest page (**Figure 15**).

8. After the appropriate relationship data is entered and saved, the Organizational Relationships tab - Add A Person page (**Figure 5**) is displayed. Click the ***Go To Person Checklist*** link to apply a checklist to the person being added. The Person Checklist page is displayed. For more information see **Person Checklist**.

Search for Matching Persons

To search for matching persons:

1. From the The Add A Person tab page (**Figure 1**), click the ***Search for Matching Persons*** link. The Search Criteria page (**Figure 16**) is displayed.

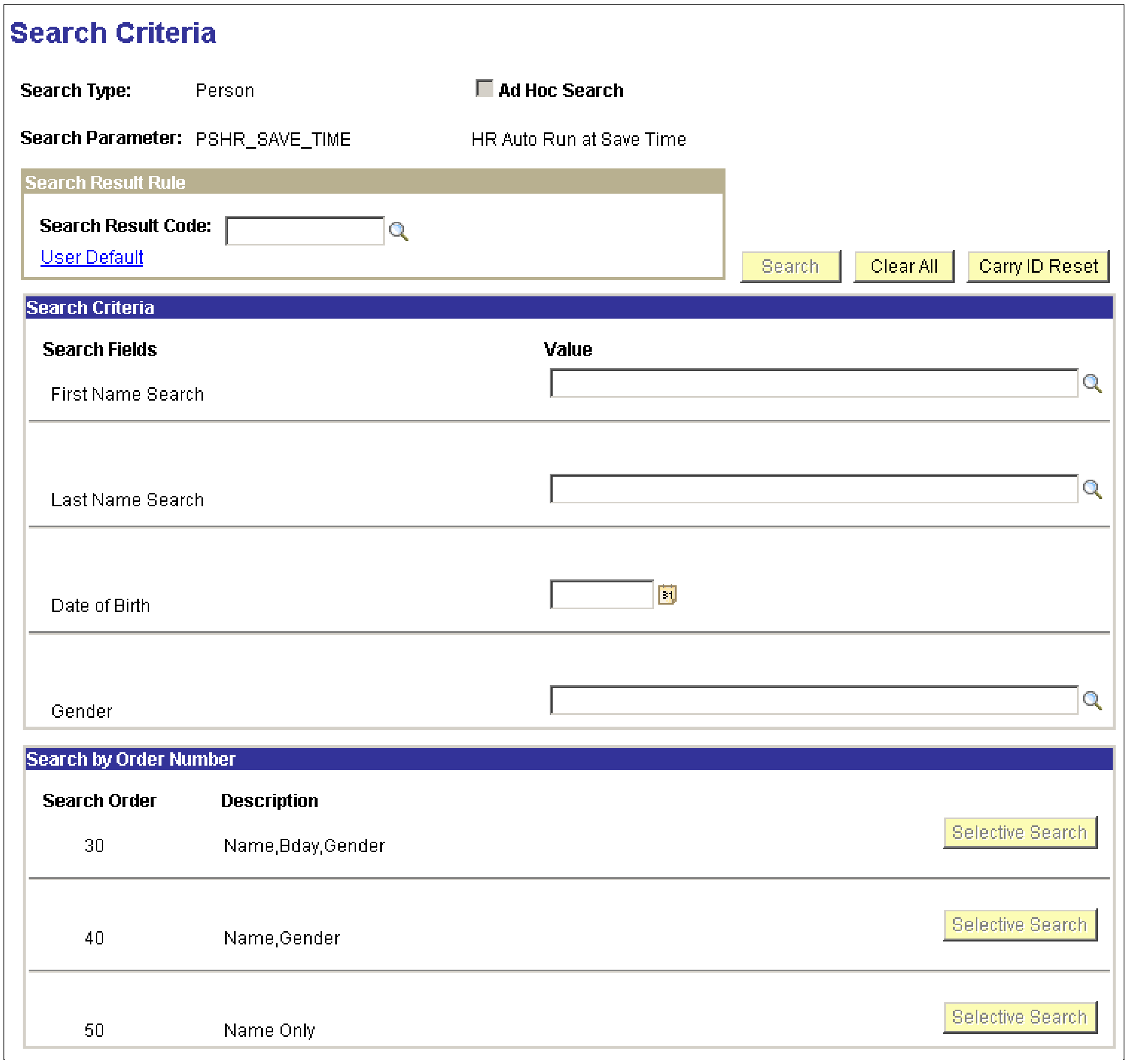


Figure 16. Search Criteria page

2. Complete the fields as follows:

Search Type	This field is system populated.
Ad Hoc Search	This box defaults to being unchecked and cannot be modified.
Search Parameter	This field is populated with the guidelines of the search and cannot be modified.
Search Result Rule	

Search Result Code	Enter the applicable search code or select a code by clicking the search icon.
Search Criteria	
First Name Search	Enter the person’s first name.
Last Name Search	Enter the person’s last name.
Date Of Birth	Enter the person’s date of birth or select a date by clicking on the calendar icon.
Gender	Enter the person’s gender information.
Search by Order Number	
Search Order	This field is populated.
Description	This field is populated with the description of the corresponding search order.

3. At this point the following options are available:

Step	Description
Click **Search**	To search based on the criteria entered.
Click **Clear All**	To clear all prior entries on this page.
Click **Selective Search**	To narrow down the search criteria for the category selected.

Modify A Person

The Modify a Person component allows the user to modify information about a person.

For more information on modifying a person, see:

[Modifying Biographical Details]
[Modifying Organizational Relationships]

To modify a person:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***Modify A Person*** component. The Personal Data page - Find An Existing Value tab (**Figure 17**) is displayed.

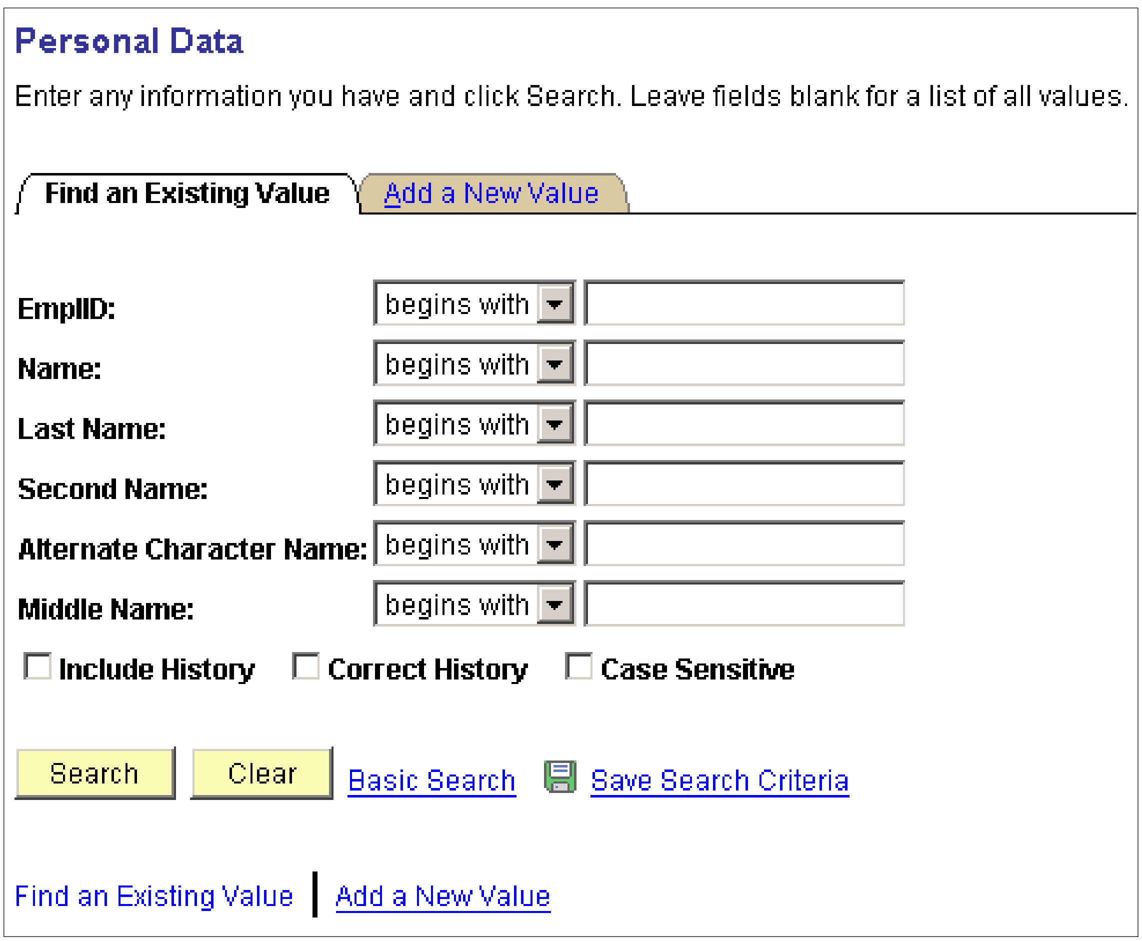


Figure 17. Personal Data page - Find An Existing Value tab

5. Complete the fields as follows:

EmplID	Enter the employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the the employee's nickname.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Biographical Details tab - Add A Person page (**Figure 2**) is displayed. Locate the field(s) to be modified and see field instructions in Add a person for the Biographical Details, Contact Information and Regional tabs for further information.

Note: Fields that require a PAR for Federal employees cannot be modified on this page. Those actions must be processed through the HR Processing page.

Modifying Biographical Details

This section contains the following topics:

Additional Names

The Additional Names component allows the user to maintain additional name types for a person.

To add an additional name:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.

4. Select the ***Additional Names*** component. The Find an Existing Value tab - Additional Names page (**Figure 18**) is displayed.

Figure 18. Find an Existing Value tab - Additional Names page

5. Complete the fields as follows:

Search by	Select the applicable value from the drop-down menu, then enter the appropriate search criteria.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to select the applicable person. The Names Other tab - Additional Names page (**Figure 19**) is displayed.

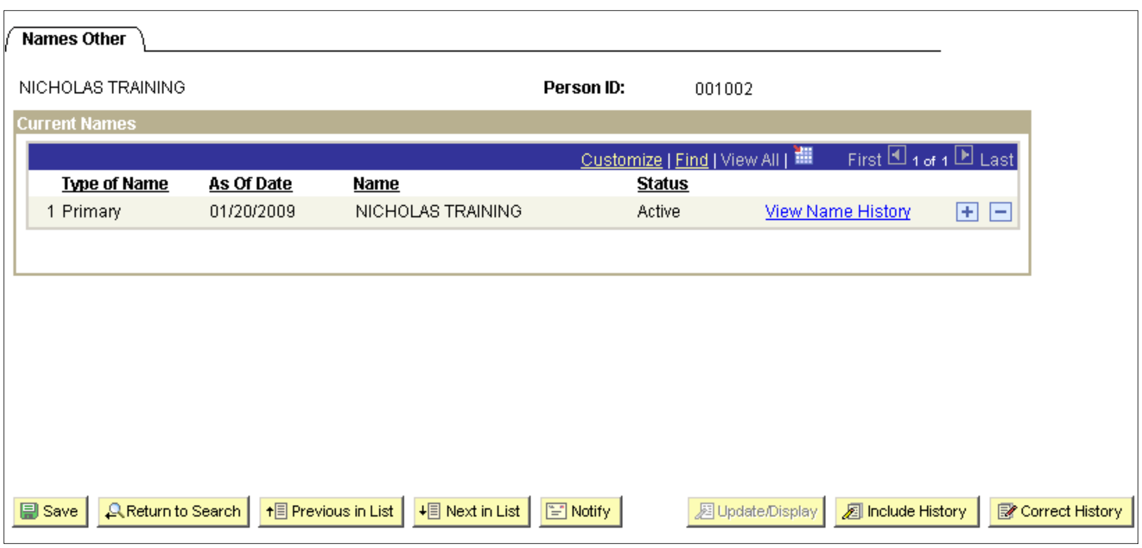


Figure 19. Names Other tab - Additional Names page

7. The fields are displayed as follows:

Person ID	This field is populated with the person ID assigned to the person.
Current Names	
Type Of Name	This field is populated with the type of name for this person.
As Of Date	This field is system populated.
Name	This field populated with the name of the person.
Status	This field is populated with the status of the person.

8. Click the ***View Name History*** link. The Name History page (**Figure 20**) is displayed.

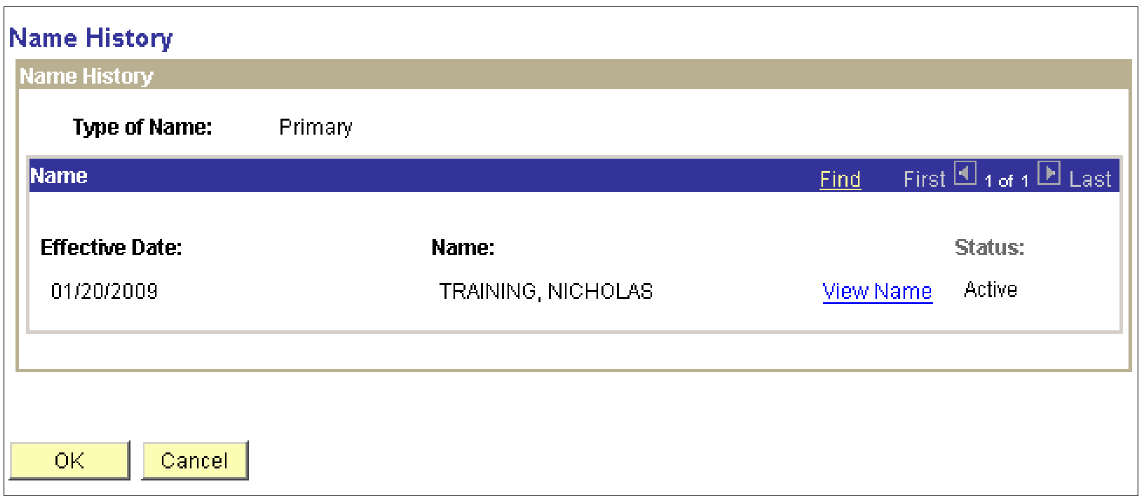


Figure 20. Name History page

9. The fields are displayed as follows:

Name History	
Type Of Name	This field is populated with the type of name.
Name	
Effective Date	This field is populated with the effective date.
Name	This field is populated with the full name of the employee.
Status	This field is populated with the status of the name.

10. Click **OK**. The Names Other tab - Additional Names page (**Figure 19**) is displayed.

OR

Click **Cancel**. The Names Other tab - Additional Names page (**Figure 19**) is displayed.

OR

Click the ***View Name*** link. The View Name page (**Figure 21**) is displayed.

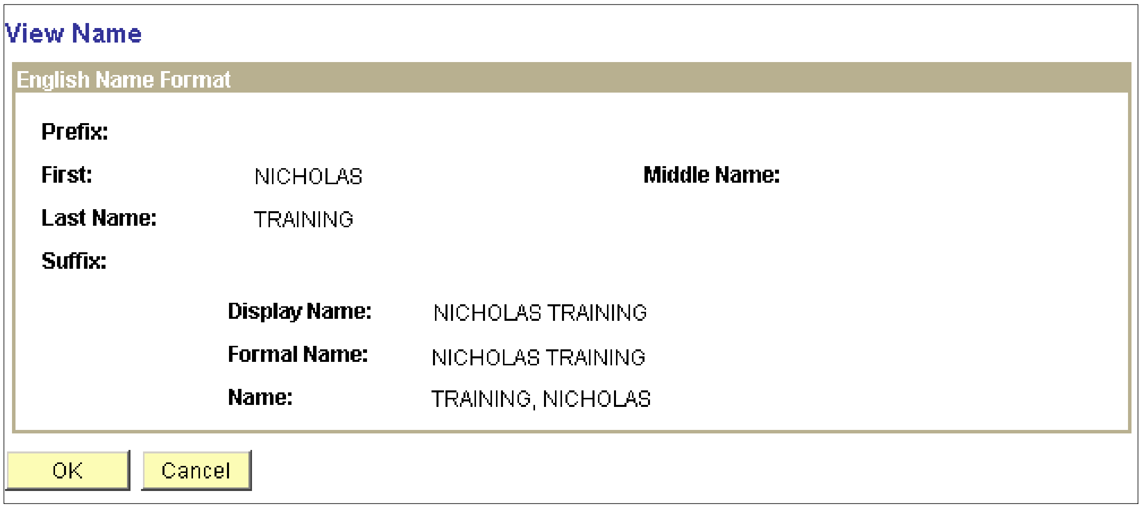


Figure 21. View Name page

11. The fields are displayed as follows:

English Name Format	
Prefix	This field is populated with the prefix of the employee's name.
First Name	This field is populated with the first name of the employee.
Middle Name	This field is populated with the middle name of the employee.
Last Name	This field is populated with the last name of the employee.
Suffix	This field is populated with the suffix of the employee's name.
Display Name	This field is populated with the employee's first and last name.
Formal Name	This field is populated with the prefix and the first and last name of the employee.
Name	This field is populated with the first, middle, and last name of the employee.

12. Click **OK**. The Name History page (**Figure 20**) is displayed.

OR

Click **Cancel**. The Name History page (**Figure 20**) is displayed.

13. Click **OK**. The Names Other tab - Additional Names page (**Figure 19**) is displayed.

OR

Click **Cancel**. The Names Other tab - Additional Names page (**Figure 19**) is displayed.

14. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Driver's License Data

The Driver's License Data component allows the user to identify or modify driver's license information.

To enter driver's license data:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***Driver's License Data*** component. The Find an Existing Value tab - Driver's License Data page (**Figure 22**) is displayed.

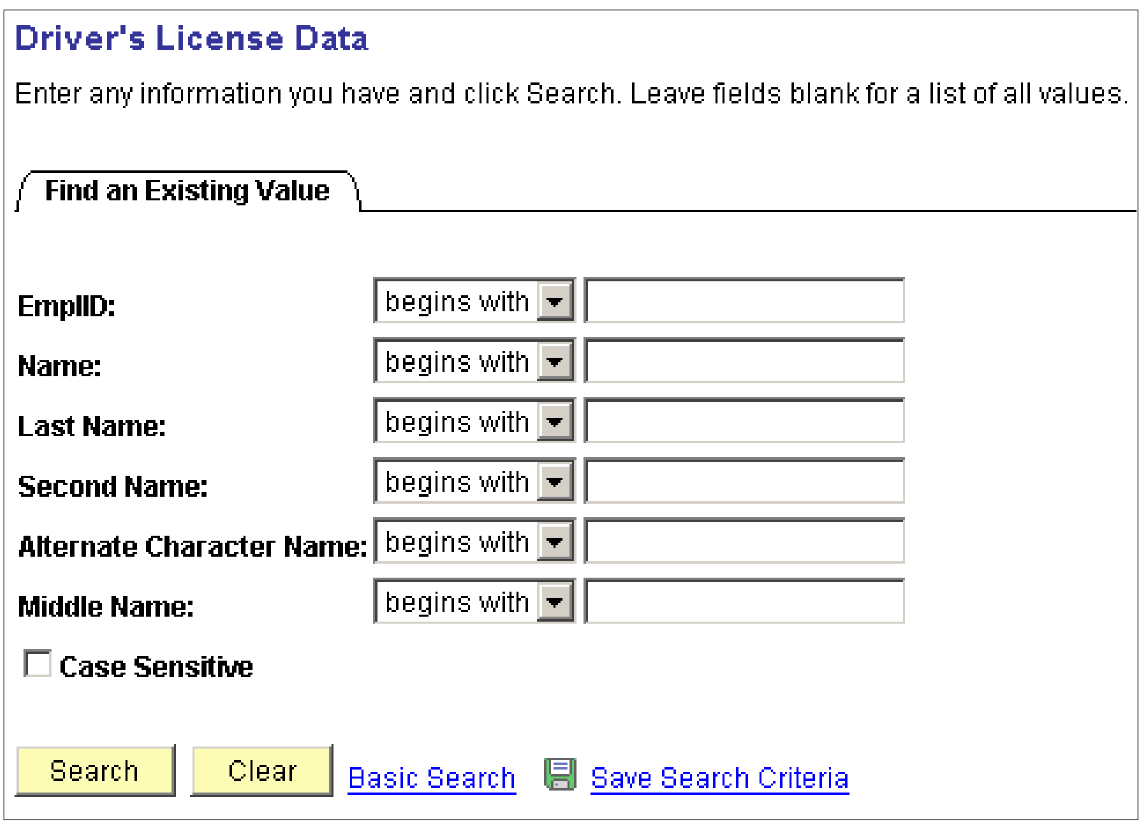


Figure 22. Find an Existing Value tab - Driver's License Data page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's second name.
Alternate Character Name	Enter the the employee's nickname.
Middle Name	Enter the employee's middle name.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Drivers License tab - Drivers License Data page (**Figure 23**) is displayed.

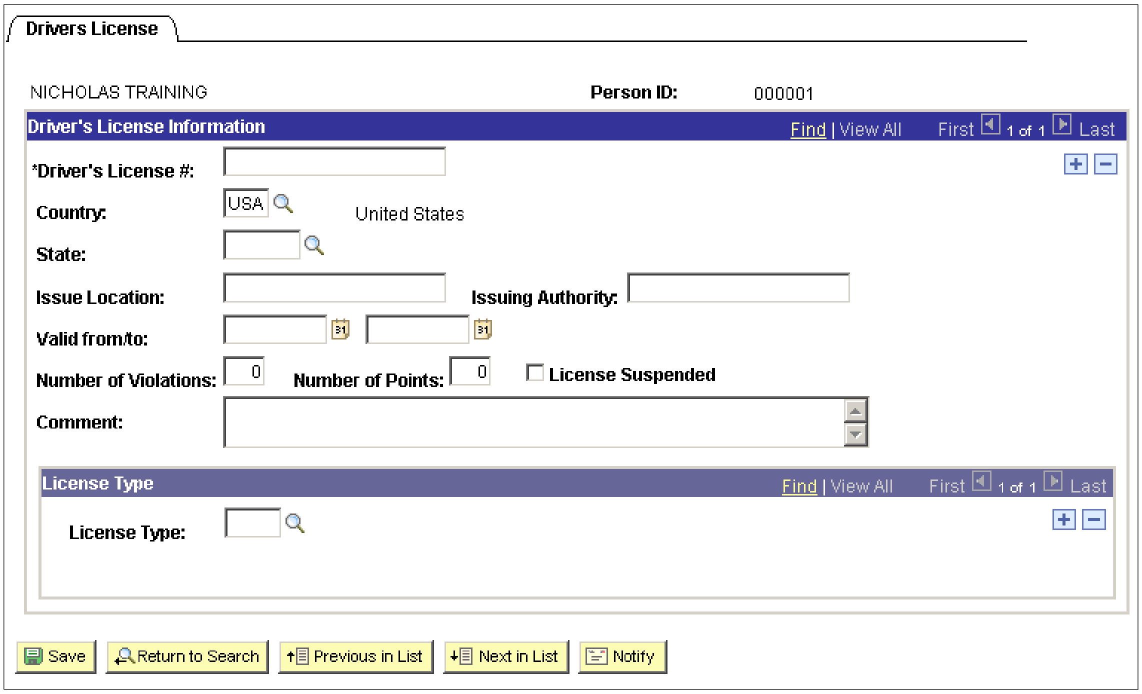


Figure 23. Drivers License tab - Drivers License Data page

8. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.

Driver's License Information	
Driver's License #	Enter the driver's license number.
Country	Enter the country the driver's license was issued or select a country by clicking the search icon. The full name of the entry or selection is displayed to the right of the field.
State	Enter the state in which the driver's license was issued or select a state by clicking the search icon.
Issue Location	Enter the location the driver's license was issued.
Issuing Authority	Enter the issuing authority.
Valid From/To	Enter the dates the driver's license is valid from and to or select the dates by clicking the calendar icon.
Number Of Violations	Enter the number of violations.
Number Of Points	Enter the number of points.
License Suspended	Check this box if the employee's license has ever been suspended.
Comment	Enter any applicable comments.
License Type	
License Type	Enter the type of license or select a type by clicking the search icon.

9. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Volunteer Activities

The Volunteer Activities component allows the user to identify a person's participation in volunteer programs.

To enter volunteer activities:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***Volunteer Activities*** component. The Find an Existing Value tab - Volunteer Activities page (**Figure 24**) is displayed.

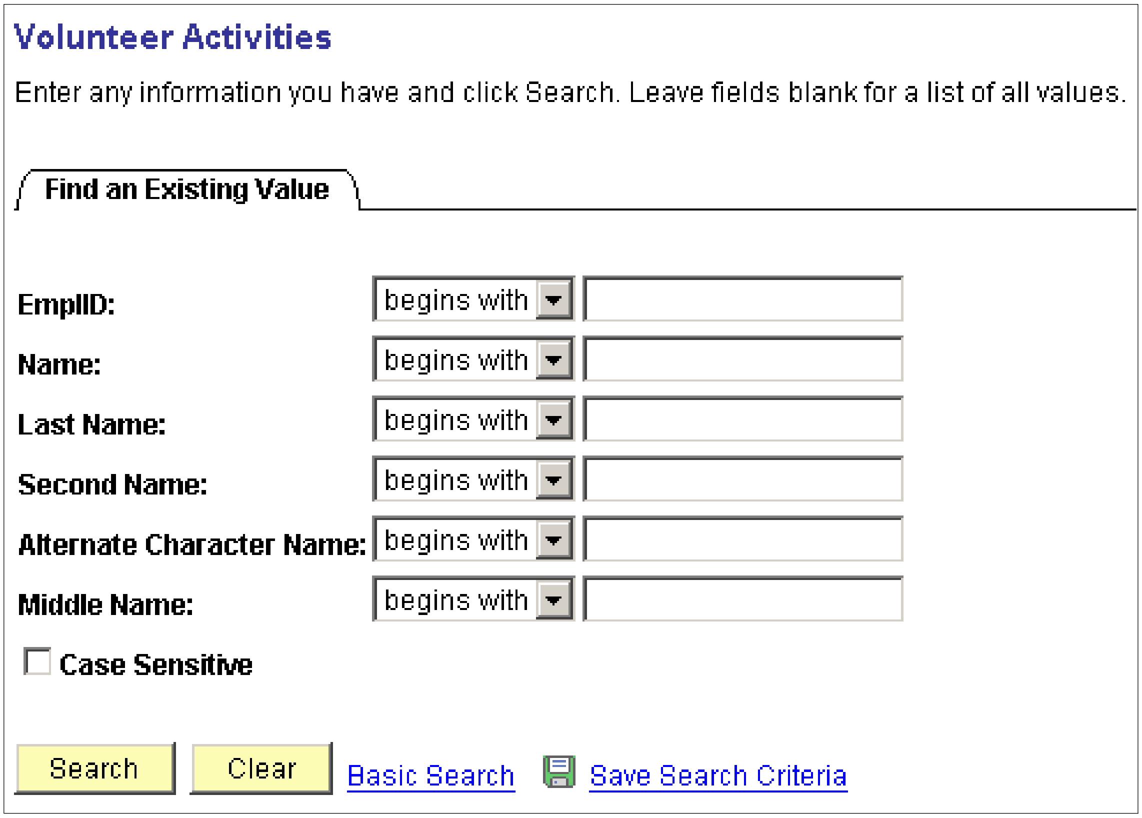


Figure 24. Find an Existing Value tab - Volunteer Activities page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Volunteer Activities tab - Volunteer Activities page (**Figure 25**) is displayed.

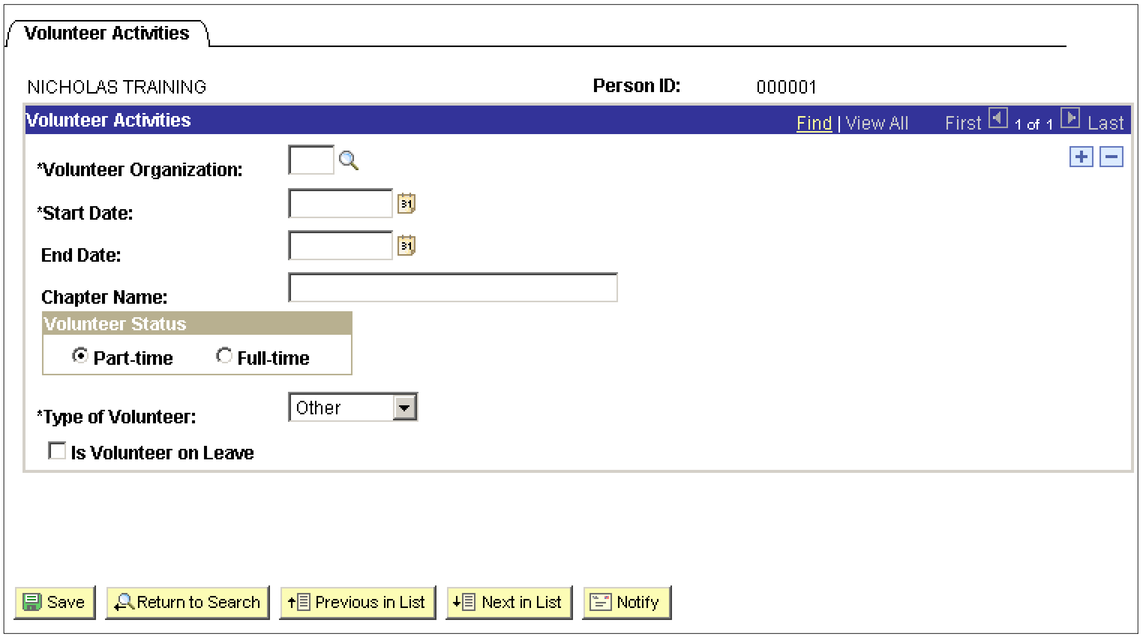


Figure 25. Volunteer Activities tab - Volunteer Activities page

8. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Volunteer Activities	
Volunteer Organization	Enter the volunteer organization or select an organization by clicking on the search icon.
Start Date	Check this box if applicable.
End Date	Select a status from the drop-down menu. The valid values are **`Active`** and **`Inactive`**.
Chapter Name	Enter the chapter name.
Volunteer Status	Select the applicable value, **`Part-time`** or **`Full-time`**.
Type of Volunteer	Select the applicable type of volunteer. The valid values are: **`Administr`** **`Canvasser`** **`Executive`** **`Fund Raise`** **`Other`**
Is Volunteer on Leave	Check this box if applicable.

9. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

General Comments

The General Comments component allow the user to enter comments about a person.

To enter general comments:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***General Comments*** component. The Find an Existing Value tab - General Comments page (**Figure 26**) is displayed.

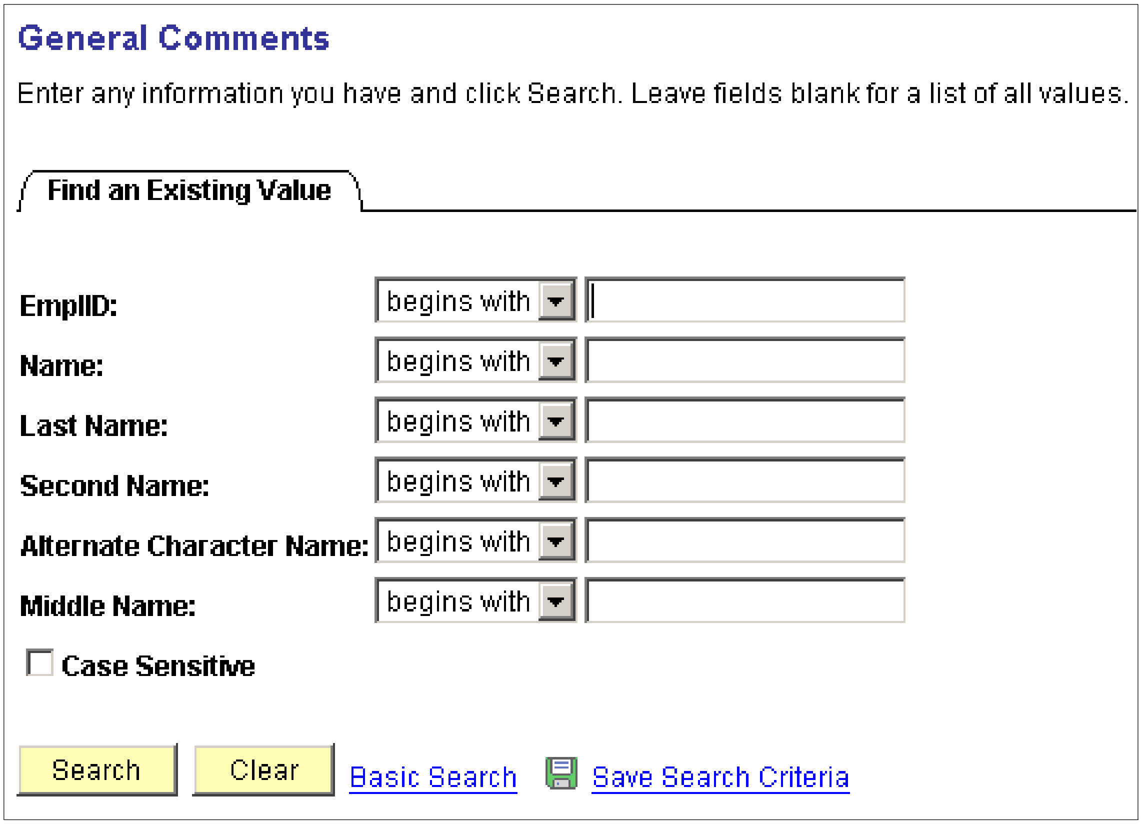


Figure 26. Find an Existing Value tab - General Comments page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee’s name.
Last Name	Enter the employee’s last name.
Second Name	Enter the employee’s second name.
Alternate Character Name	Enter the employee’s nickname.
Middle Name	Enter the employee’s middle name.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The General Comments tab - General Comments page (**Figure 27**) is displayed.

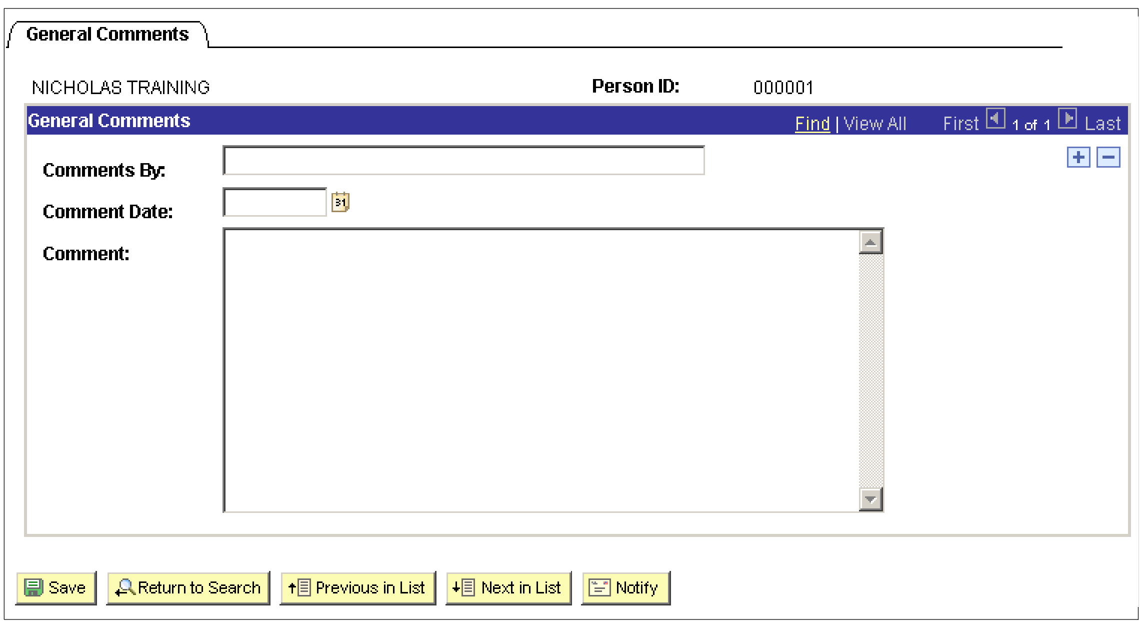


Figure 27. General Comments tab - General Comments page

8. Complete the fields as follows:

Name	This field is populated with the employee’s name.
Person ID	This field is populated with the person ID assigned to the person.
General Comments	
Comments By	Enter the name of the person entering the comments.

Comment Date	Enter the comment date or select a date by clicking the calendar icon.
Comment	Enter the comments.

9. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Modifying Organizational Relationships

This section contains the following topics:

New Employment Instance USF

The New Employment Instance USF component allows the user to create a new employee instance along with the job data for the employee. This will also create a new Employee Record Number.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Organizational Relationships*** menu item.
4. Select the ***New Employment Instance USF*** component. The New Employment Instance tab page (**Figure 28**) is displayed.

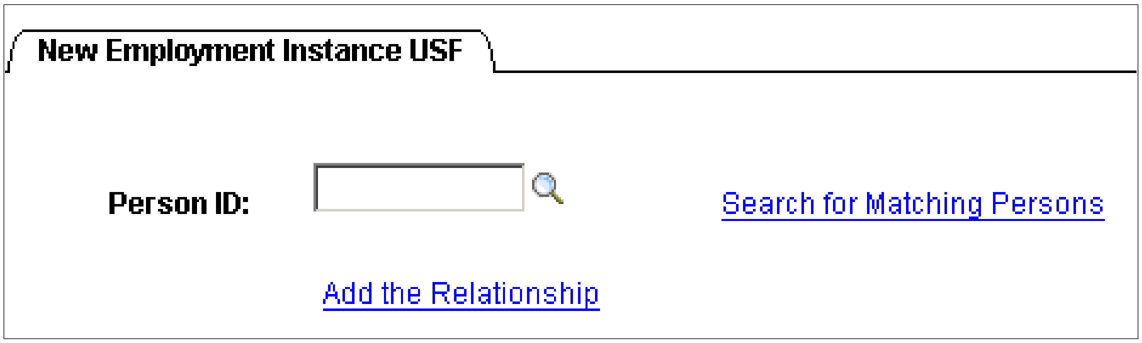


Figure 28. New Employment Instance tab page

5. Complete the fields as follows:

Person ID	Enter the Person ID or select an ID by clicking the search icon.

6. Click the ***Add The Relationship*** link. For more information on PAR Processing, refer to Chapter 17, Section 5.

OR

Click the ***Search For Matching Persons*** link. The Search/Match page (**Figure 29**) is displayed.

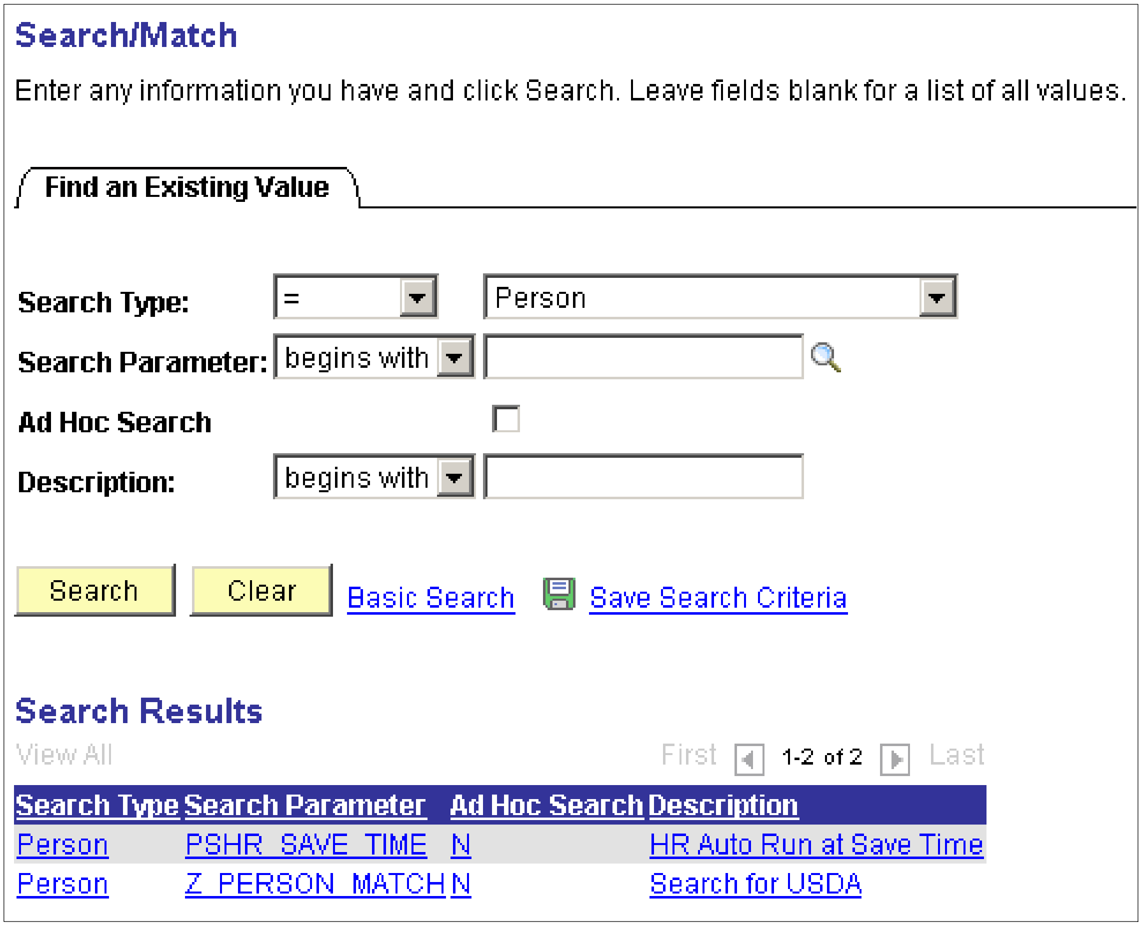


Figure 29. Search/Match page

7. Complete the fields as follows:

Search Type	Select the type of search from the drop-down menu. Valid values are **`Applicant`**, **`Organization`**, or **`Person`**.
Search Parameter	Enter the search parameter or select a parameter by clicking the search icon.
Ad Hoc Search	Check this box if applicable.
Description	Enter the description.

8. Click **Search**. Select the applicable value from the search results. The Search Criteria page is displayed (**Figure 16**). For more information, see **Search for Matching Persons**.

New Contingent Worker Instance

The New Contingent Worker Instance component allows the user to create a new contingent worker instance along with the job data for the person. This will also create a new employee record number.

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Personal Information*** menu.

3. Select the ***Organizational Relationships*** menu item.

4. Select the ***New Contingent Worker Instance*** component. The Add Contingent worker Instance page - Add A New Value tab (**Figure 30**) is displayed.

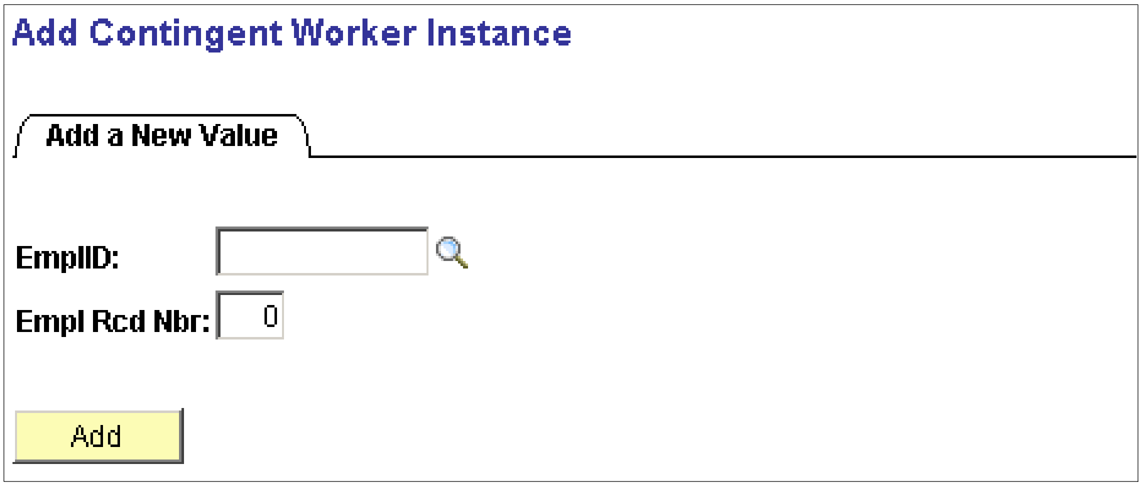


Figure 30. Add Contingent Worker Instance page - Add A New Value tab

5. Complete the fields as follows:

EmplID	Enter the Employee ID or select an ID by clicking the search icon.
Empl Rcd Nbr	Enter the Employee Record Number.

6. Click **Add**. The Work Location tab - Contingent Worker page (**Figure 9**) is displayed. See **Contingent Worker** for more information.

Add A POI Relationship

This component will create a new POI instance with or without job data for the person. This will also create a new Employee Record Number.

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Personal Information*** menu.

3. Select the ***Organizational Relationships*** menu item.

4. Select the ***Add A POI Relationship*** component. The Add a New value tab - Add New POI Type page (**Figure 31**) is displayed.

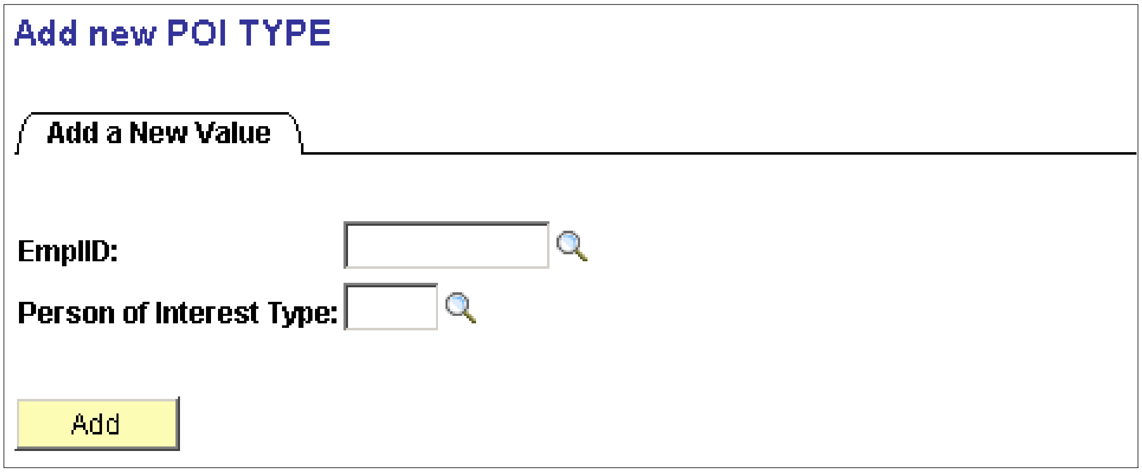


Figure 31. Add A New Value tab - Add New POI Type page

5. Complete the fields as follows:

EmplID	Enter the Employee ID or select an ID by clicking the search icon.
Person Of Interest Type	Enter the Person of Interest type or select a type by clicking the search icon.

6. Click **Add**. The Add Person Of Interest tab - Person Of Interest page (**Figure 15**) is displayed. See **Person of Interest with Job Data** or **Person of Interest without Job Data** for more information.

Prior Work Experience

The Prior Work Experience allows the user to enter a person's previous work experience.

To enter prior work experience:

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Personal Information*** menu.

3. Select the ***Biographical*** menu item.

4. Select the ***Prior Work Experience*** component. The Find an Existing Value tab - Prior Work Experience page (**Figure 32**) is displayed.

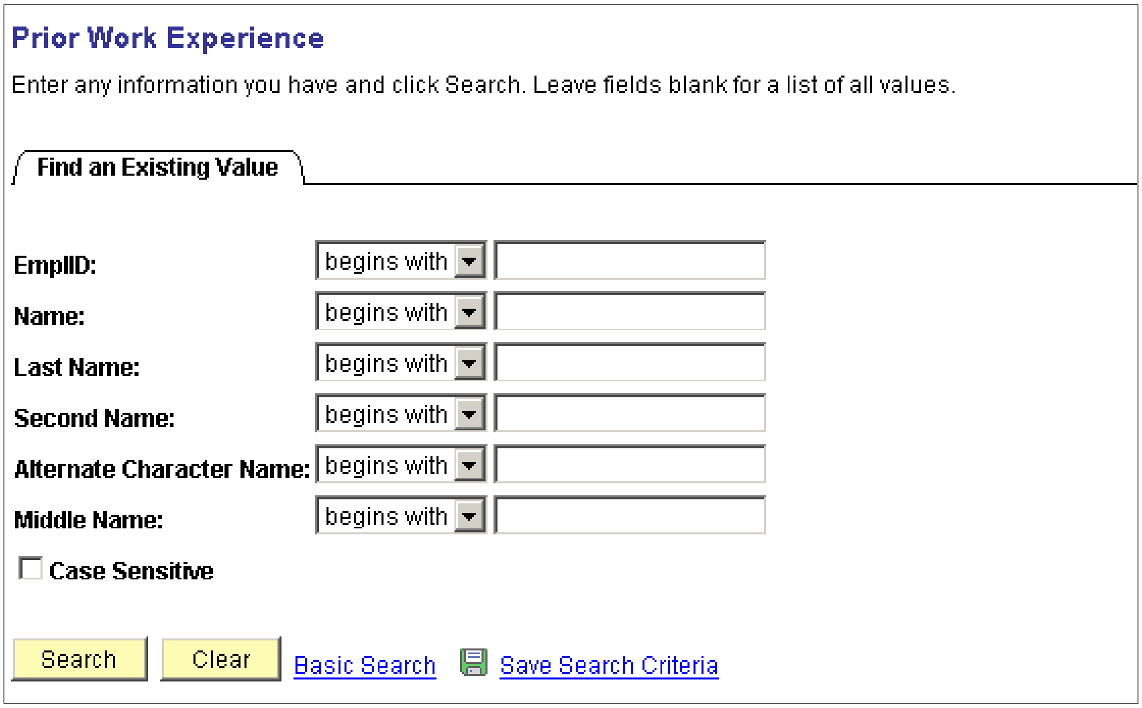


Figure 32. Find an Existing Value tab - Prior Work Experience page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's second name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Prior Work Experience tab - Prior Work Experience page (**Figure 33**) is displayed.

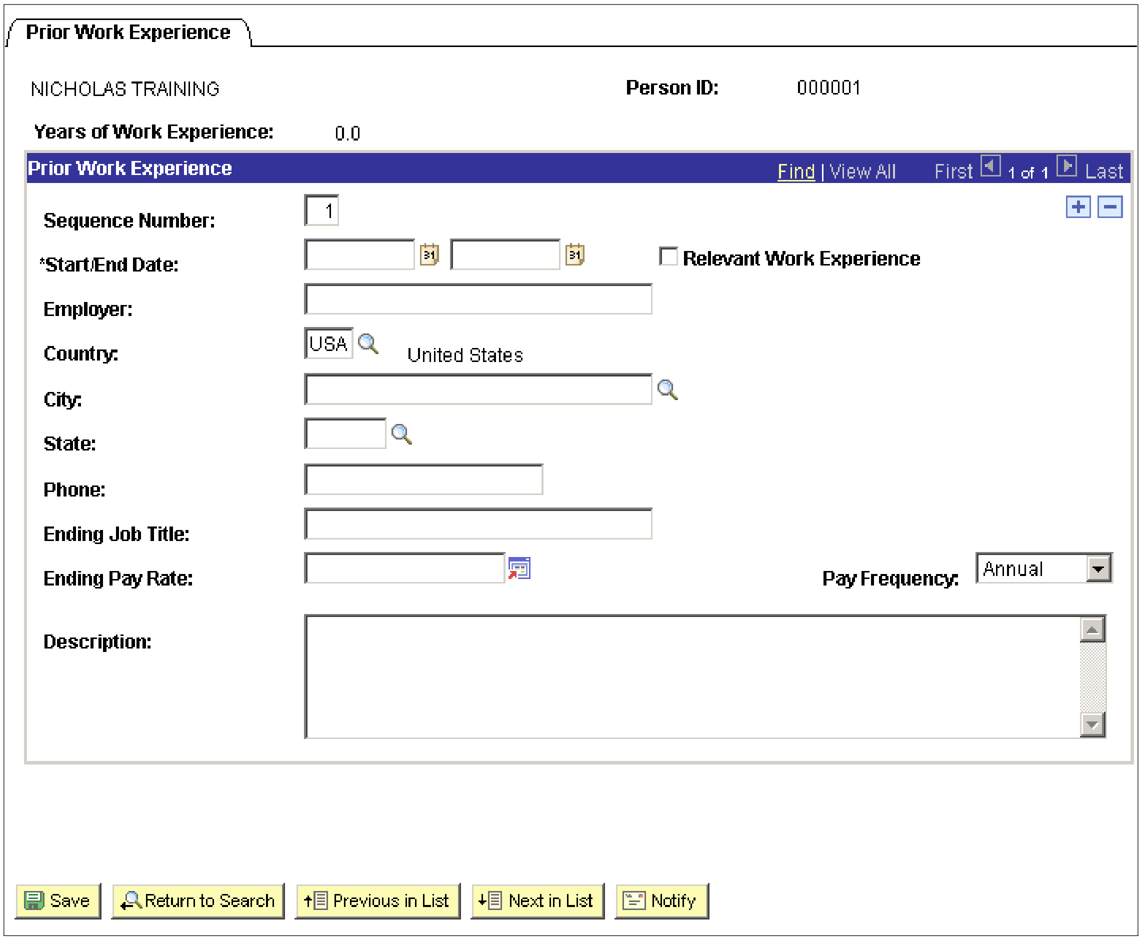


Figure 33. Prior Work Experience tab - Prior Work Experience page

8. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Years Of Work Experience	This field is system populated.
Prior Work Experience	
Sequence Number	Enter the sequence number.
Start/End Date	Enter the start/end date of the work experience or select the dates by clicking on the calendar icon.
Relevant Work Experience	Check this box if applicable.
Employer	Enter the employer.
Country	Enter the country.

City	Enter the city or select a city by clicking on the search icon.
State	Enter the state of select a state by clicking on the search icon.
Phone	Enter the phone number.
Ending Job Title	Enter the last job title held.
Ending Pay Rate	Enter the ending pay rate or select a pay rate by clicking the currency icon.
Pay Frequency	Select the pay frequency from the drop-down menu.
Description	Enter the description of the work experience gained.

9. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Job Data

The Job Data component allows the user view and modify job data for Contingent Workers and POIs with jobs only.

To view/modify job data:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Job Data*** component. The Find An Existing Value tab - Job Data page (**Figure 34**) is displayed.

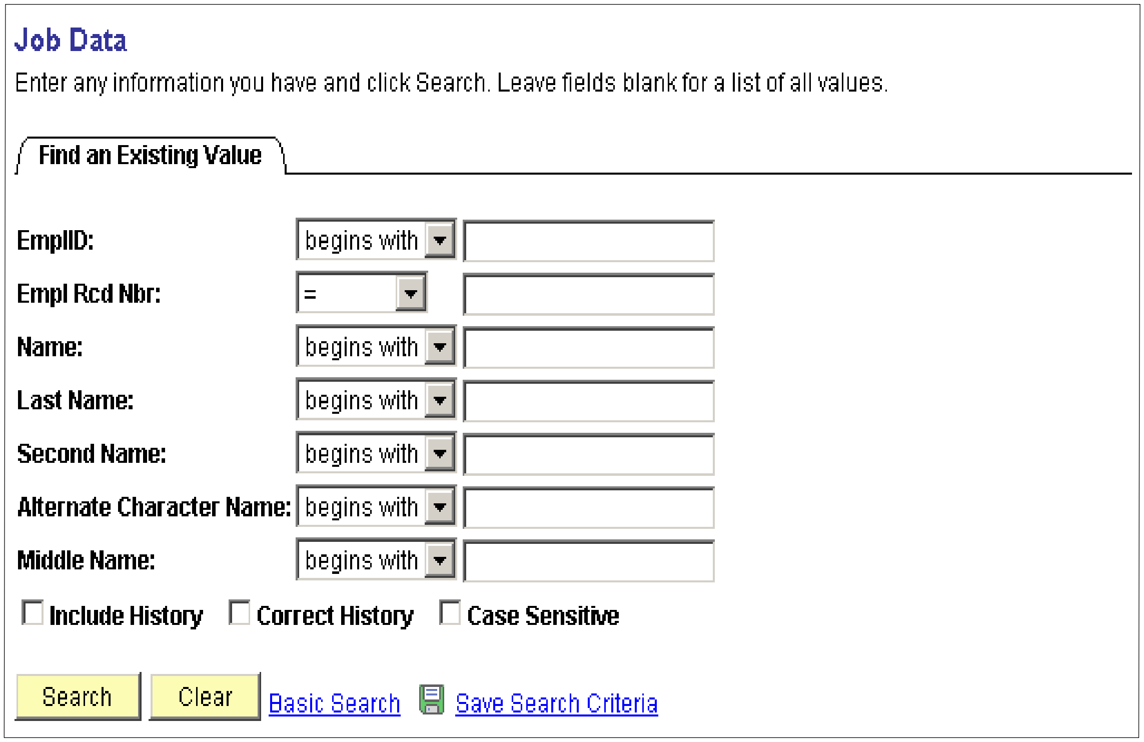


Figure 34. Find An Existing Value tab - Job Data page

4. Complete the fields as follows:

EmplID	Enter the Employee ID.
Empl Rcd Nbr	Enter the employee record number.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's second name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered. The Work Location tab - Job Data page (**Figure 35**) is displayed.

   OR

   Click **Clear** to clear all entries.

6. Locate the field(s) to be modified, then see field instructions for Add a Person for further information.

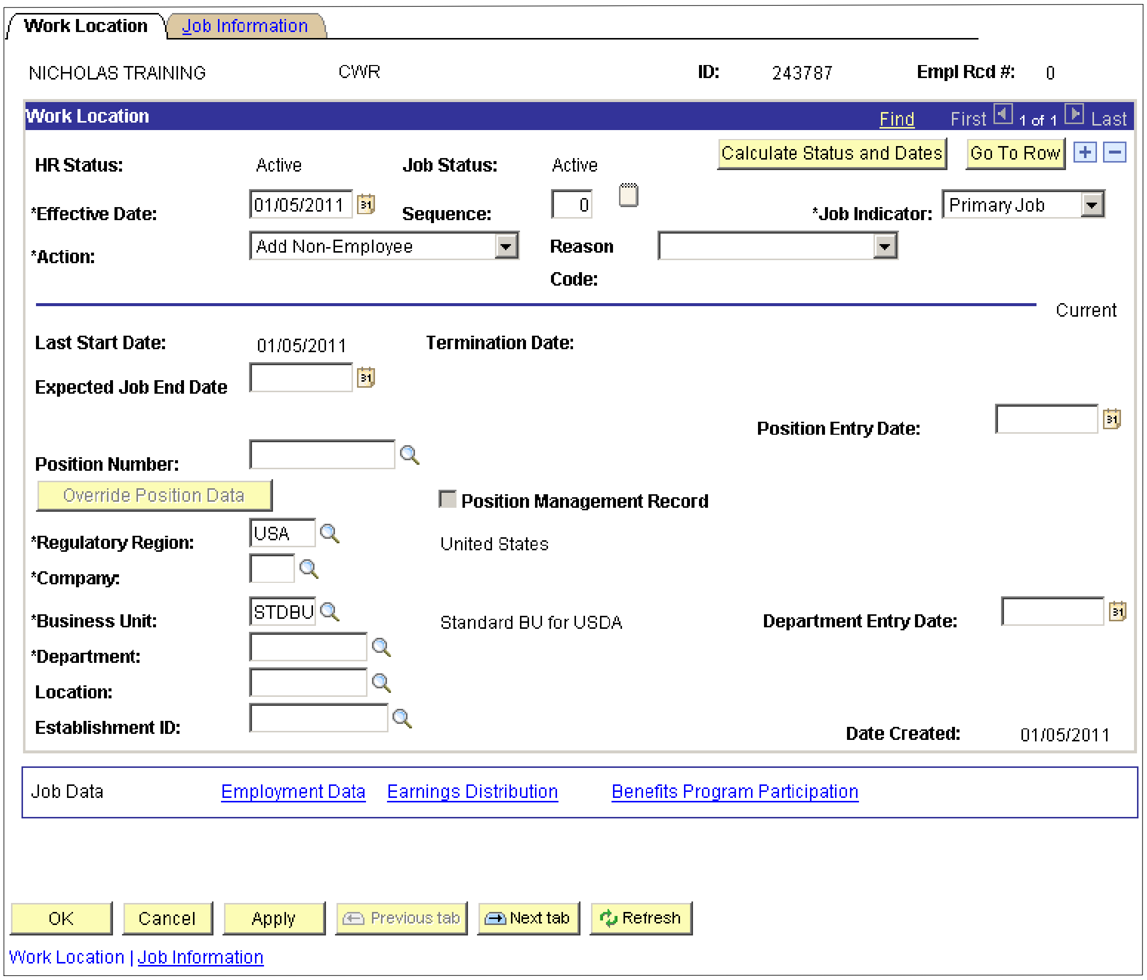


Figure 35. Work Location tab - Job Data page

Company Property

This component will identity all property assigned to an employee.

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Job Information*** menu.

3. Select the ***Company Property*** component. The Find an Existing Value tab - Company Property page (**Figure 36**) is displayed.

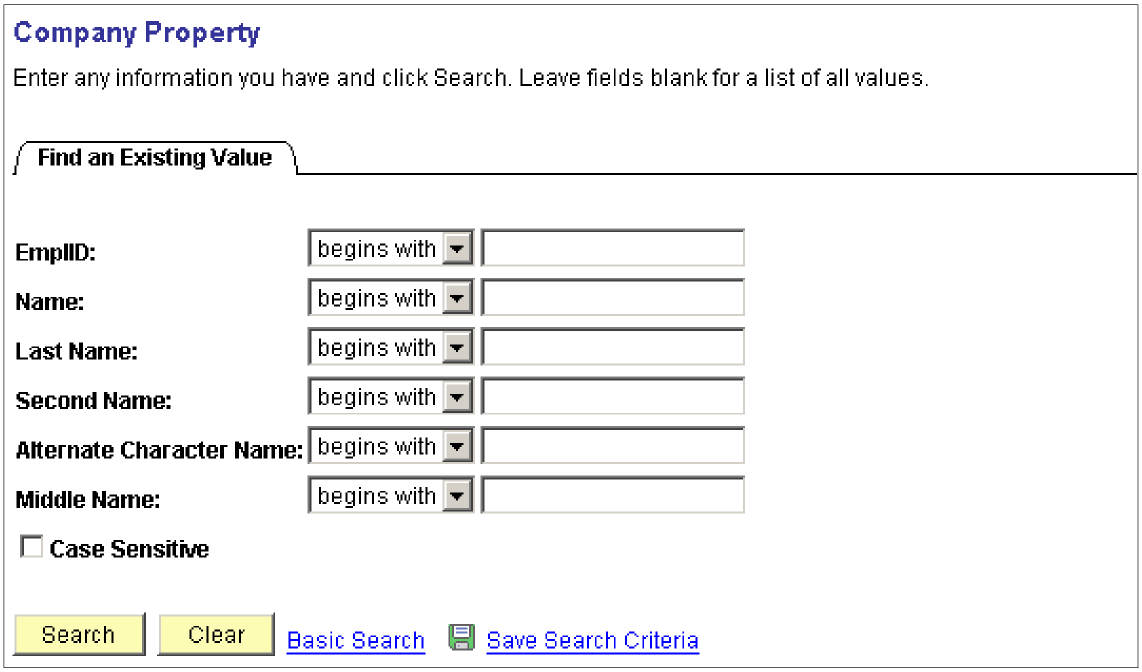


Figure 36. Find an Existing Value tab - Company Property page

4. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee’s name.
Last Name	Enter the employee’s last name.
Second Name	Enter the employee’s middle name.
Alternate Character Name	Enter the employee’s nickname.
Middle Name	Enter the employee’s middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Company Property tab - Company Property page (**Figure 37**) is displayed.

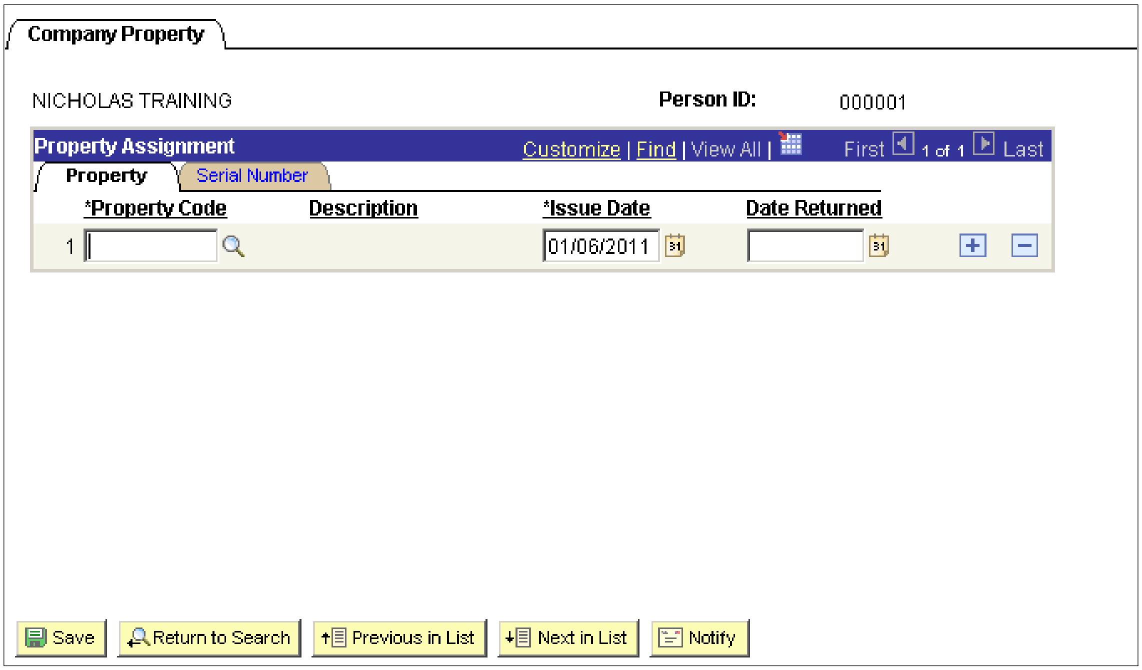


Figure 37. Company Property tab - Company Property page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Property Assignment	
Property Code	Enter the property code or select a code by clicking the search icon.
Description	This field is populated with the description of the property code entered or selected.
Issue Date	Enter the issue date or select a date by clicking on the calendar icon.
Date Returned	Enter the date returned or select a date by clicking on the calendar icon.

8. Click the ***Serial Number*** tab. The Company Property, Serial Number tab - Company Property page (**Figure 38**) is displayed.

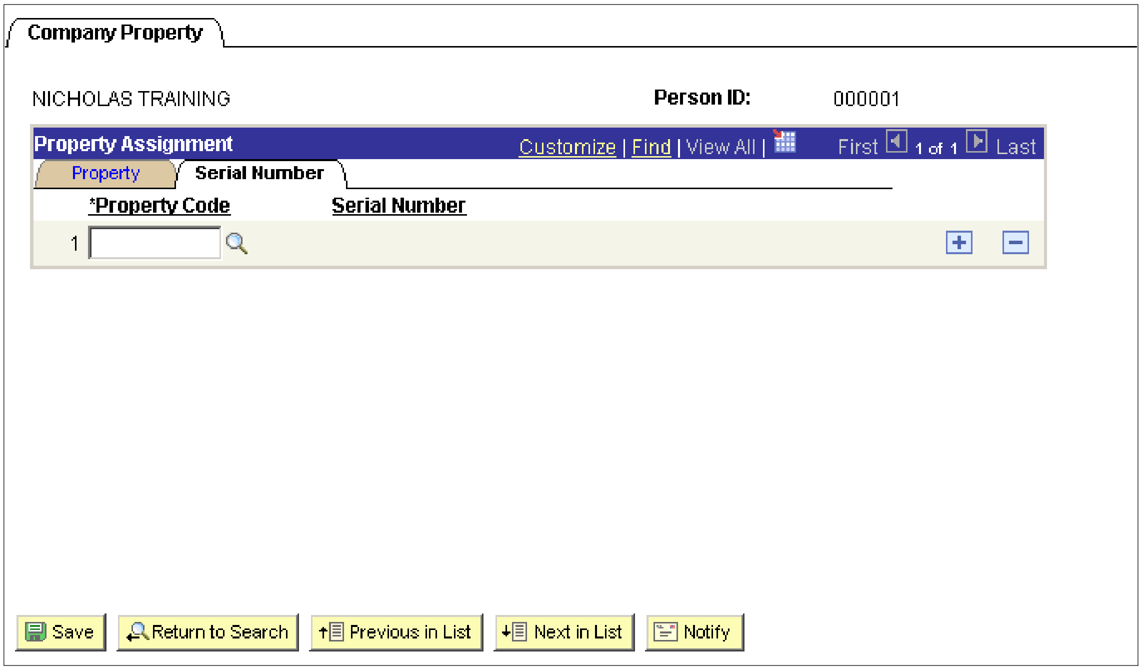


Figure 38. Company Property, Serial Number tab - Company Property page

9. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Property Assignment	
Property Code	Enter the property code or select a code by clicking the search icon.
Serial Number	This field is populated with the serial number that corresponds to the property code entered or selected.

10. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Person Checklist

A checklist is a list of additional components that need to be completed for a person. The Person Checklist allows the user to select and create a checklist for themselves. When the user selects a checklist code for a person and creates a relationship, the application also creates a record in the Person Checklist component. A person can have multiple checklists either at the same time or over time.

To create a person checklist:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Organizational Relationships*** menu item.
4. Select the ***Person Checklist*** component. The Find An Existing Value tab - Person Checklist page (**Figure 39**) is displayed.

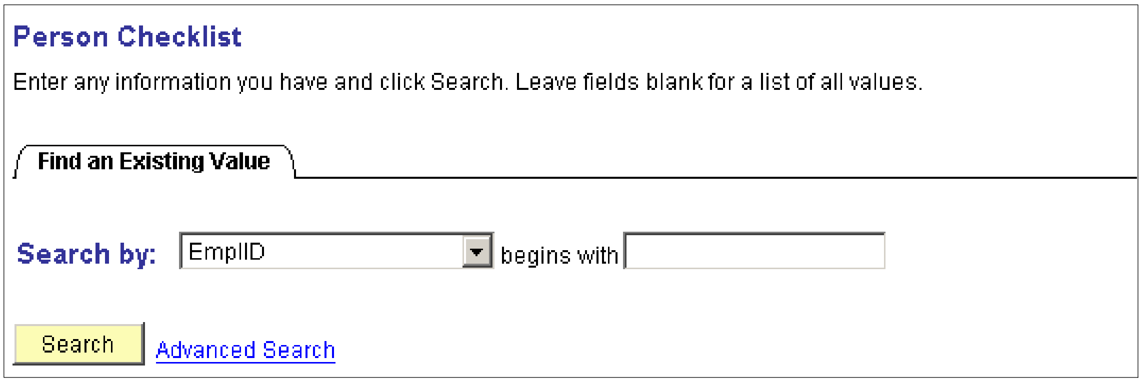


Figure 39. Find an Existing Value tab - Person Checklist page

5. Complete the field as follows:

Search by	Select the applicable value from the drop-down list.
Begins With	Enter the appropriate search criteria based on the selection made in the search by field.

6. Click **Search** to select the applicable person. The Person Checklist tab - Person Checklist page (**Figure 40**) is displayed.

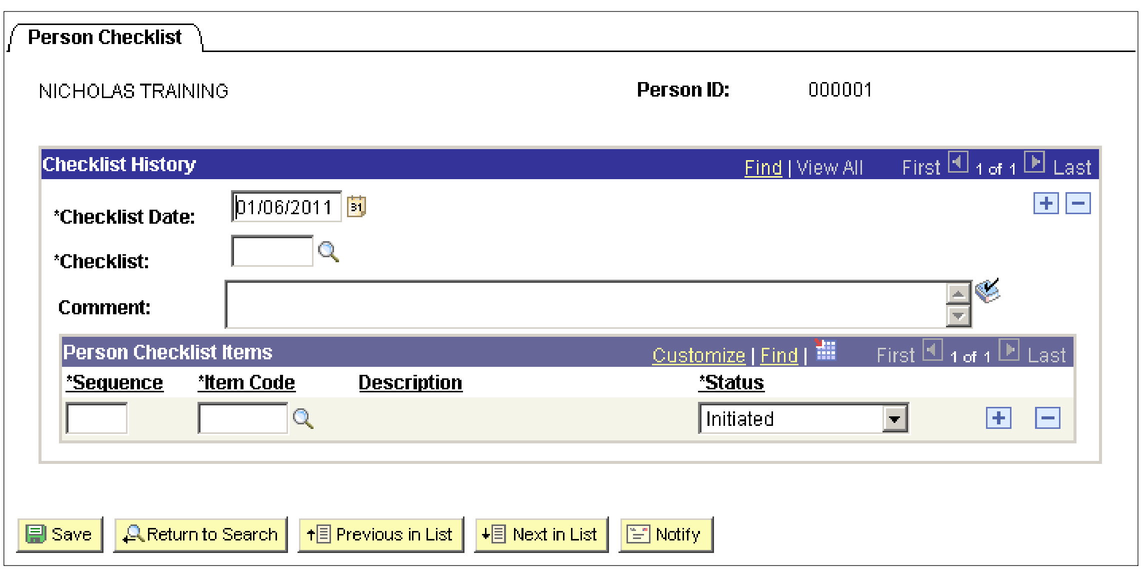


Figure 40. Person Checklist tab - Person Checklist page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Checklist History	
Checklist Date	Enter the checklist date or select a date by clicking the calendar icon.
Checklist	Enter the checklist or select a checklist by clicking the search icon.
Comment	Enter the applicable comments.
Person Checklist Items	
Sequence	This field is populated with the number order in which the items are displayed.
Item Code	This field is populated with the item code of the checklist items displayed.
Description	This field is populated with the description of the item code.
Status	Select the status from the drop-down list. The valid values are **`Initiated`** and **`Completed`**.
Link ID	This field displays the link to the page of the corresponding item code.

8. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Notify**.	To send a notification.

Adding A Disability

This component identifies an employee's disability status and accommodation requests, options and job tasks.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Disability*** menu item.
4. Select the ***Disabilities*** component. The Find An Existing Value tab - Disabilities page (**Figure 41**) is displayed.

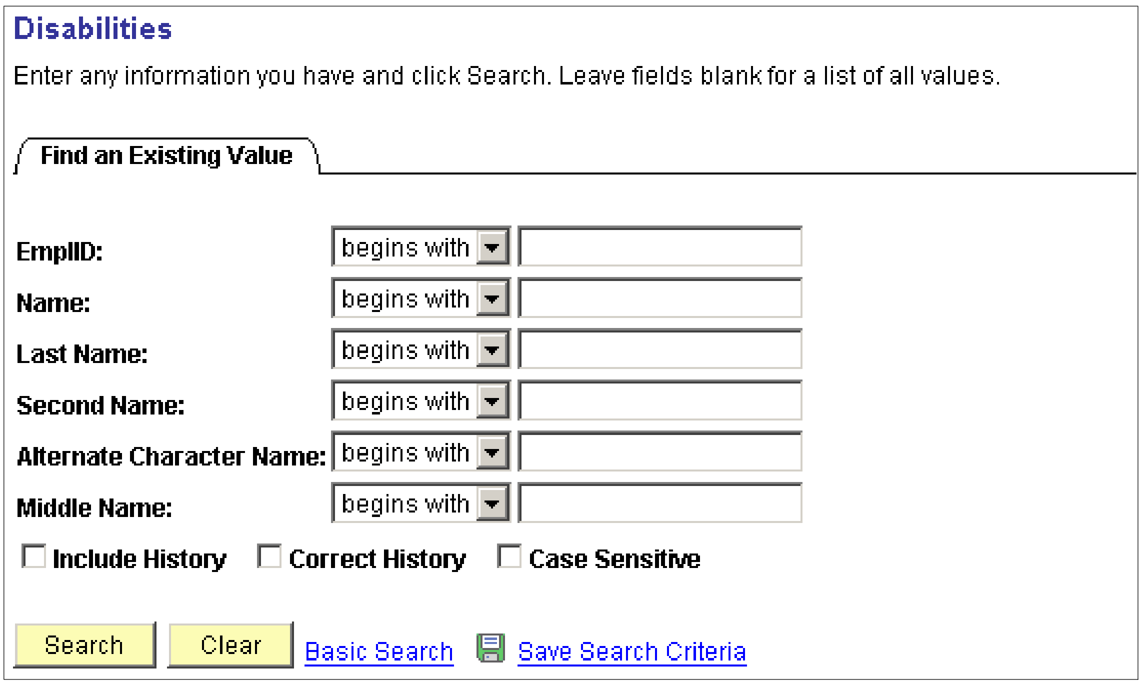


Figure 41. Find An Existing Value tab - Disabilities page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's second name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Include History	Check this box if applicable

Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search**. The Disability tab - Disabilities page (**Figure 42**) is displayed.

   OR

   Click **Clear** to clear the entry.

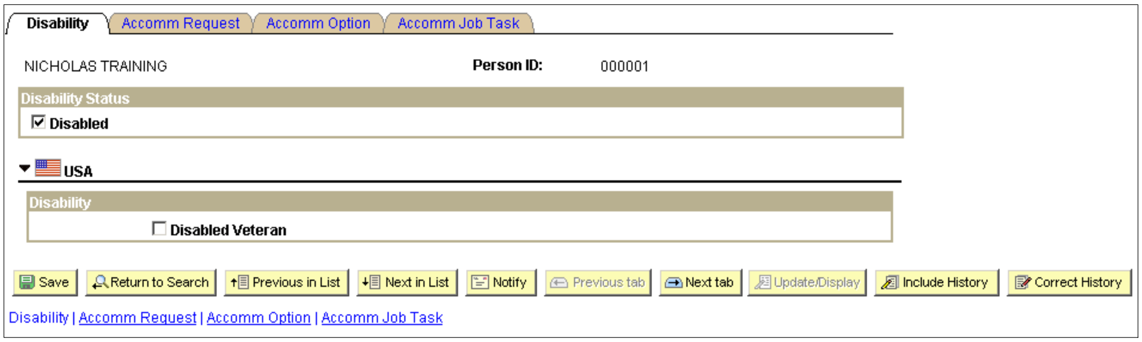


Figure 42. Disability tab - Disabilities page

7. Complete the fields as follows:

Name	This field is populated with the employee’s name.
Person ID	This field is populated with the person ID assigned to the person.
Disability Status	
Disabled	Check this box if applicable
Disability	
Disabled Veteran	Check this box if applicable.

8. Click the ***Accomm Request*** tab. The Accomm Request tab - Disabilities page (**Figure 43**) is displayed.

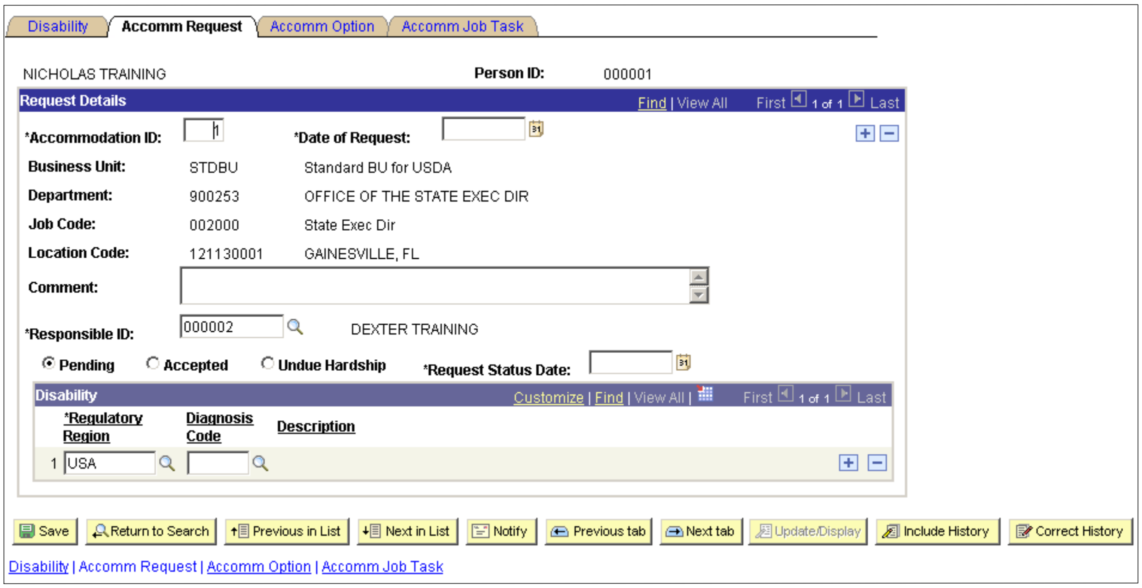


Figure 43. Accomm Request tab - Disabilities page

9. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Request Details	
Accomodation ID	Enter the accommodation ID.
Date of Request	Enter the date of the request or select a date by clicking the calendar icon.
Business Unit	This field is populated.
Department	This field is populated with the department number and name.
Job Code	This field is populated with the job code number and name.
Location Code	This field is populated with the location code.
Comment	Enter any applicable comments.
Responsible ID	Enter the responsible ID or select an ID by clicking on the search icon.
Pending	Select this option if applicable.
Accepted	Select this option if applicable.
Undue Hardship	Select this option if applicable.
Request Status Date	Enter the request status date or select a date by clicking the calendar icon.
Disability	

Regulatory Region	Enter the regulatory region or select a region by clicking the search icon.
Diagnosis Code	Enter the diagnosis code or select a code by clicking the search icon.
Description	This field is populated based on the regulatory region and diagnosis code entered or selected in the previous fields.

10. Click the ***Accomm Option*** tab. The Accomm Option tab - Disabilities page (**Figure 44**) is displayed.

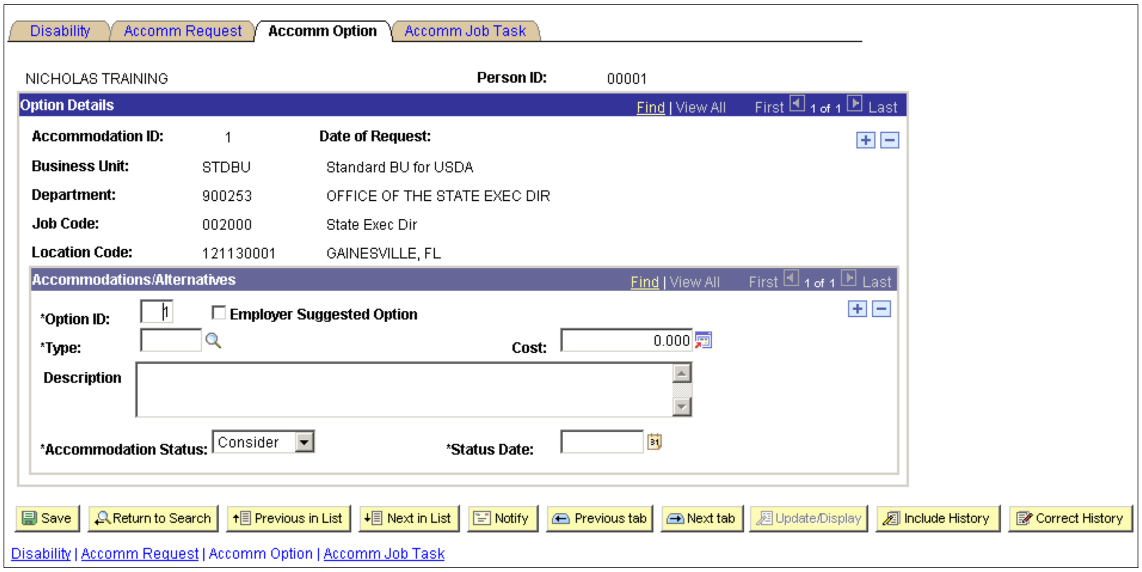


Figure 44. Accomm Option tab - Disabilities page

11. Complete the fields as follows:

Name	This field is populated with the employee’s name.
Person ID	This field is populated with the person ID assigned to the person.
Option Details	
Accomodation ID	This field is populated based on the accommodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 43**).
Date of Request	This field is populated based on the accommodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 43**).
Business Unit	This field is populated with the business unit and name.
Department	This field is populated with the department number and name.
Job Code	This field is populated with the job code number and name.
Location Code	This field is populated with the location code.
Accomodations/Alternatives	

Comment	Enter any applicable comments.
Option ID	Enter the option ID.
Employer Suggested Option	Check this box if applicable.
Type	Enter the type or select a type by clicking the search icon.
Cost	Enter the cost or select a cost by clicking the currency icon.
Accomodation Status	Select an accommodation status from the drop-down list.
Status Date	Enter the status date or select a date by clicking the calendar icon.

12. Click the ***Accomm Job Task*** tab. The Accomm Job Task tab - Disabilities page (**Figure 45**) is displayed.

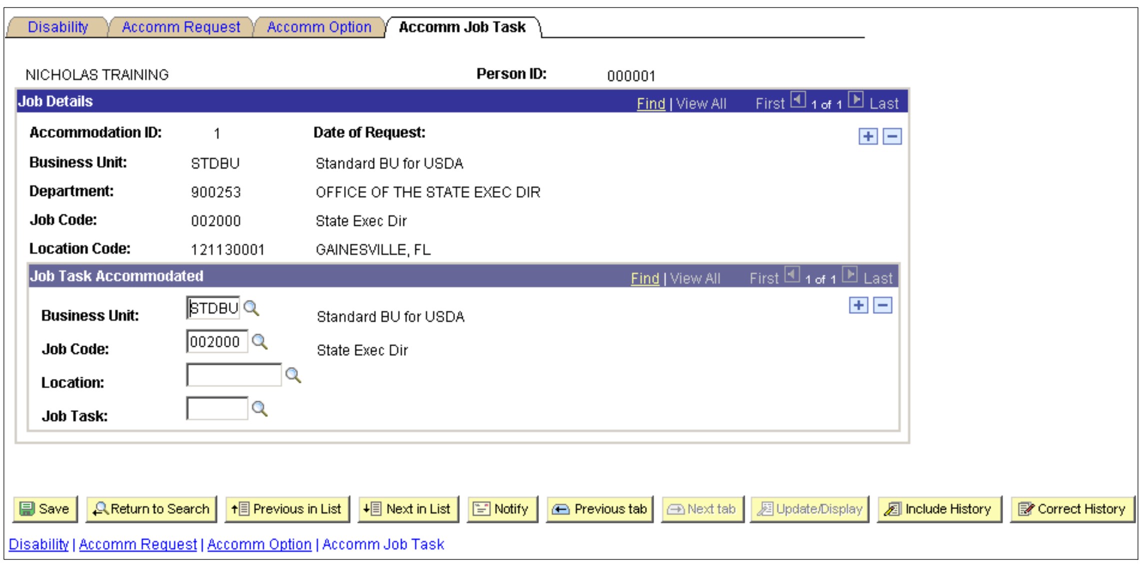


Figure 45. Accomm Job Task tab - Disabilities page

13. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Job Details	
Accomodation ID	This field is populated based on the accommodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 43**).
Date of Request	This field is populated based on the accommodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 43**).
Business Unit	This field is populated with the business unit and name.

Department	This field is populated with the department number and name.
Job Code	This field is populated with the job code number and name.
Location Code	This field is populated with the location code.
Job Task Accommodated	
Business Unit	Enter the business unit or select a unit by clicking the search icon. The name is displayed after the entry or selection is made.
Job Code	Enter the job code or select a code by clicking the search icon. The name is displayed after the entry or selection is made.
Location	Enter the location or select a location by clicking the search icon. The name is displayed after the entry or selection is made.
Job Task	Enter the job task or select a task by clicking the search icon. The name is displayed after the entry or selection is made.

14. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.
Click **Previous Tab**	To go back to the previous tab on the page.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record

Adding Identification Data

This component identifies citizenship, passport, visa and permit information and an employee photo.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Citizenship*** menu item.
4. Select the ***Identification Data*** component. The Find an Existing Value tab - Identification Data page (**Figure 46**) is displayed.

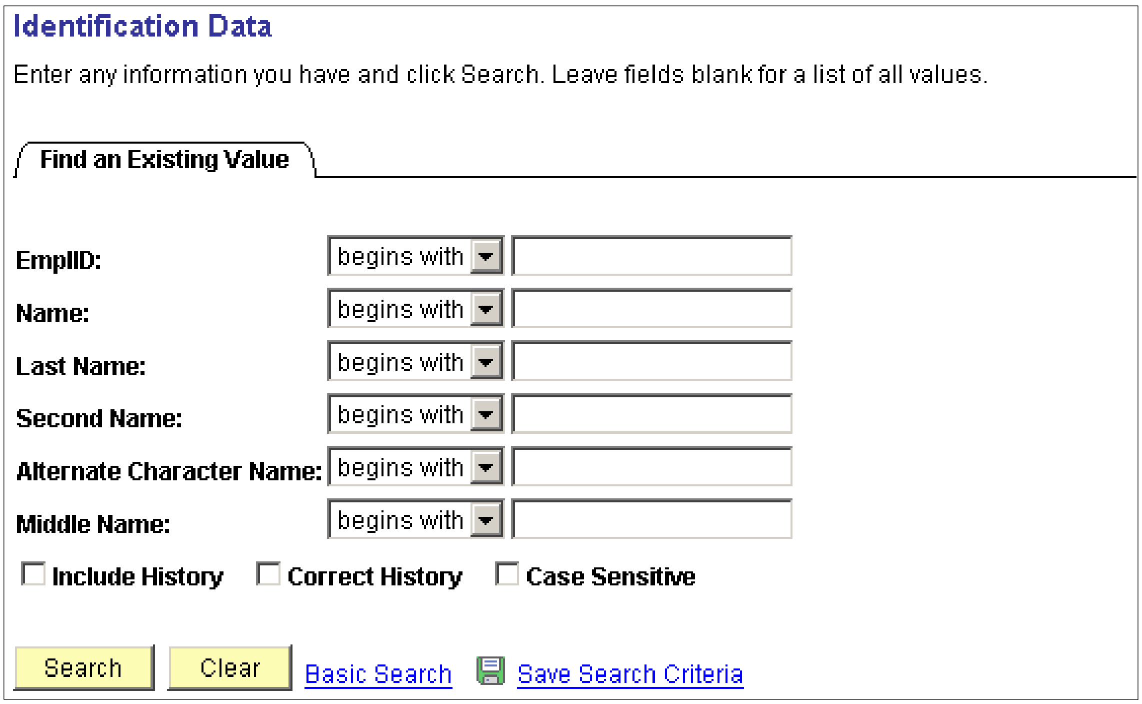


Figure 46. Find an Existing Value tab - Identification Data page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's second name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Include History	Check this box if applicable.

Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Citizenship/Passport tab - Identification Data page (**Figure 47**) is displayed.

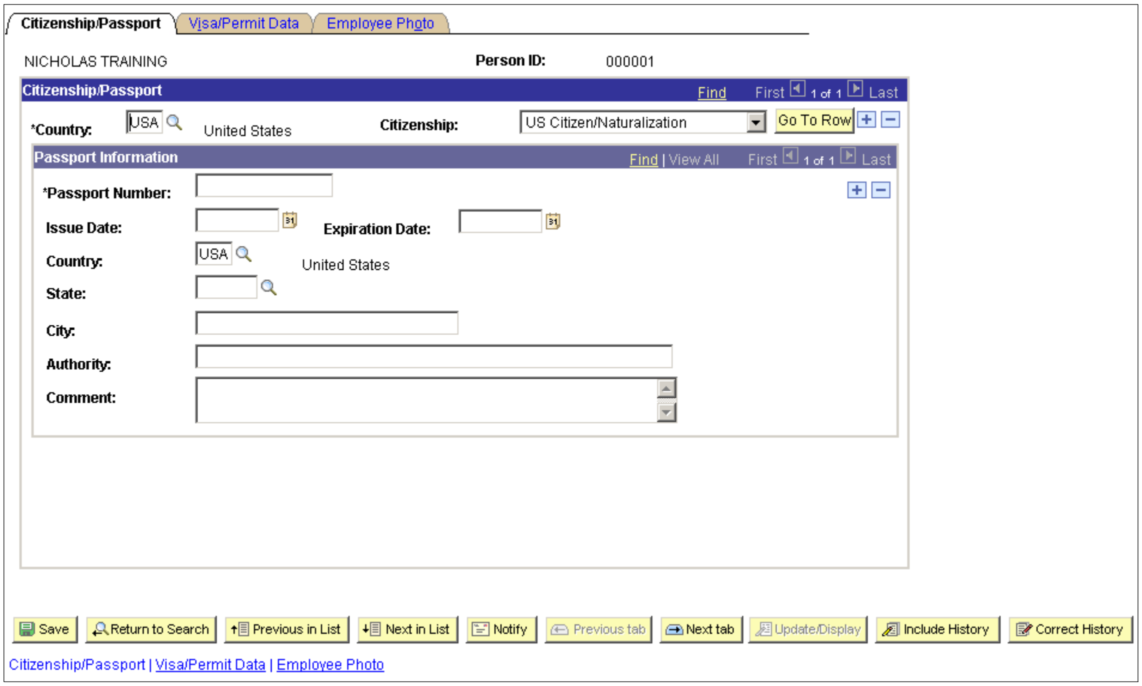


Figure 47. Citizenship/Passport tab - Identification Data page

8. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Citizenship/Passport	
Country	Enter the country or select a country by clicking the search icon.
Citizenship Status	Select the citizenship status from the drop-down list. The valid values are:
Passport Information	
Passport Number	Enter the passport number.
Issue Date	Enter the date the passport was issued or select a date by clicking the calendar icon.

Expiration Date	Enter the date the passport will expire or select a date by clicking the calendar icon.
Country	Enter the country or select a country by clicking the search icon.

9. Click the ***Visa/Permit Data*** tab. The Visa/Permit Data tab - Identification Data page (**Figure 48**) is displayed.

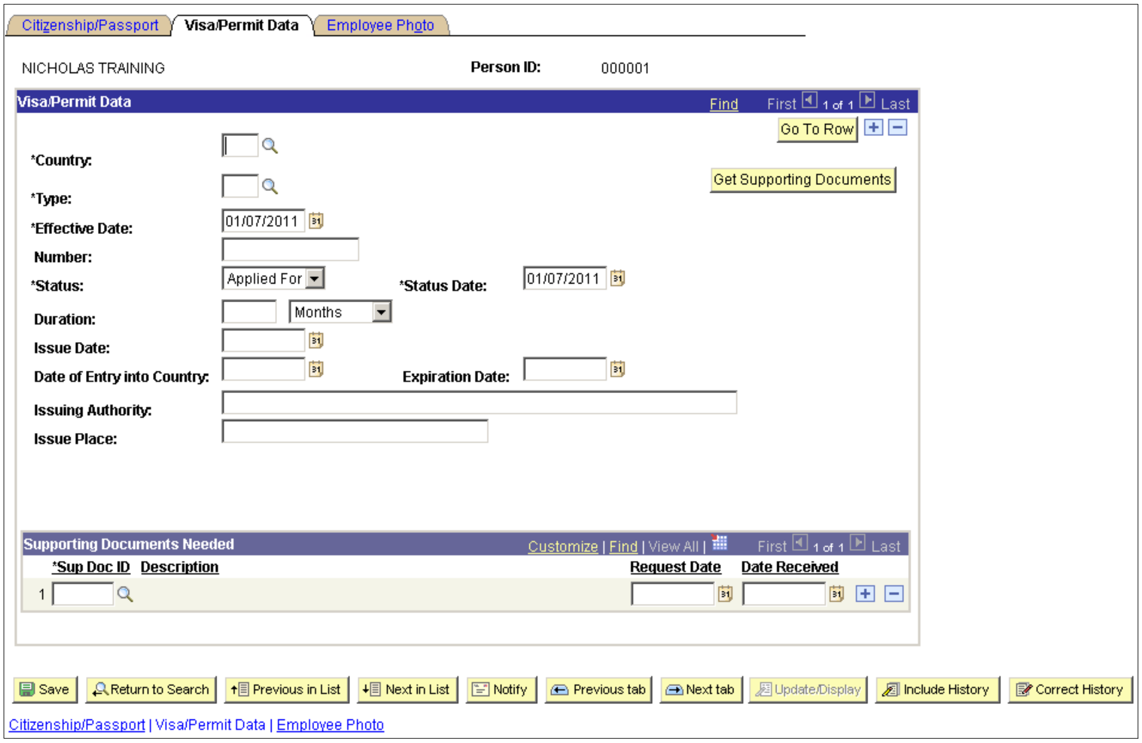


Figure 48. Visa/Permit Data tab - Identification Data page

10. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Visa/Permit Data	
Country	Enter the country or select a country by clicking the search icon.
Type	Select the type of visa/permit or select a type by clicking the search icon.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Number	Enter the visa/permit number.
Status	Select a status from the drop-down list.
Status Date	Enter the status date or select a date by clicking the calendar icon.

Duration	Enter the number of the duration of the visa/permit, then select the timeframe from the drop-down list.
Issue Date	Enter the date the visa/permit was issued or select a date by clicking the calendar icon.
Date Of Entry Into Country	Enter the date the employee entered into the country or select a date by clicking the calendar icon.
Expiration Date	Enter the expiration date of the visa/permit or select a date by clicking the calendar icon.
Issuing Authority	Enter the issuing authority.
Issue Place	Enter the place the visa/permit was issued.
Supporting Documents Needed	
Sup Doc ID	Enter the supporting document ID or select an ID by clicking the search icon. The description of your entry or selection is displayed to the right.
Description	This field is populated based on the supporting document ID entered or selected.
Request Date	Enter the request date of the visa/permit or select a date by clicking the calendar icon.
Date Received	Enter the receipt date of the visa/permit or select a date by clicking the calendar icon.

11. Select the ***Employee Photo*** tab. The Employee Photo tab - Identification Data page (**Figure 49**) is displayed.

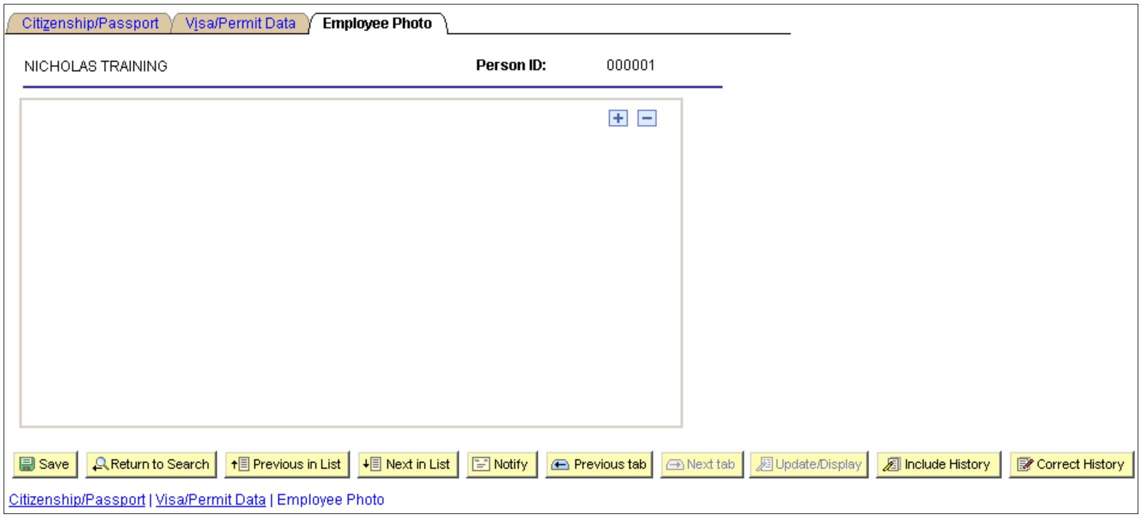


Figure 49. Employee Photo tab - Identification Data page

12. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Employee Photo	Click **+** to add the employee's photo.

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Notify**.	To send a notification.
Click **Previous Tab**.	To go back to the previous tab on the page.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Viewing Person Data

This section contains the following topics:

Person Organizational Summary

This component will allow users to view a person's organizational relationships.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Person Organizational Summary*** component. The Find An Existing Value tab - Person Organizational Summary page (**Figure 50**) is displayed.

Figure 50. Find An Existing Value tab - Person Organizational Summary page

4. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's name.

Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered. The Person Org Summary tab - Person Organizational page (**Figure 51**) is displayed.

OR

Click **Clear** to clear all entries.

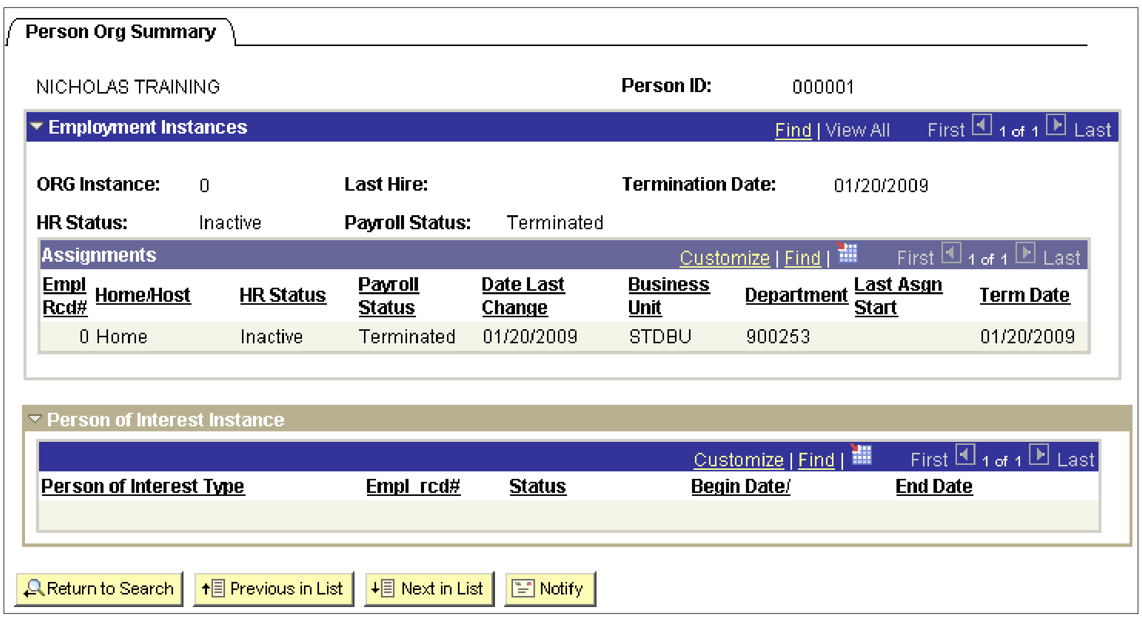


Figure 51. Person Org Summary tab - Person Organizational page

6. The following fields are displayed:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Employment Instances	
ORG Instance	This field is populated with the organizational instance.
Last Hire	This field is populated with the person's last hire date as an employee.
Termination Date	This field is populated with the person's termination date as an employee.
HR Status	This field is populated with the HR status of the employee.

Payroll Status	This field is populated with the payroll status of the employee.
-Assignments	
Empl Rcd #	This field is populated with the employee record number.
Home/Host	This field is populated with the status of the employee's assignment.
HR Status	This field is populated with the HR status of the employee's assignment.
Payroll Status	This field is populated with the payroll status of the employee's assignment.
Date Last Change	This field is populated with the date the assignment was last changed.
Business Unit	This field is populated with the business unit the employee is/was assigned to.
Department	This field is populated with the department number the employee is/was assigned to.
Last Asgn Start	This field is populated with the date the assignment was started.
Term Date	This field is populated with the termination date of the assignment.
Contingent Worker Instances	
ORG Instance	This field is populated with the organizational instance.
Last Hire	This field is populated with the person's last hire date as a contingent worker.
Termination Date	This field is populated with the person's termination date as a contingent worker.
HR Status	This field is populated with the HR status of the contingent worker.
Payroll Status	This field is populated with the payroll status of the contingent worker.
-Assignments	
Empl Rcd #	This field is populated with the employee record number.
Home/Host	This field is populated with the status of the contingent worker's assignment.
HR Status	This field is populated with the HR status of the contingent worker's assignment.
Payroll Status	This field is populated with the payroll status of the contingent worker's assignment.
Date Last Change	This field is populated with the date the assignment was last changed.
Business Unit	This field is populated with the business unit the contingent worker is/was assigned to.
Department	This field is populated with the department number the contingent worker is/was assigned to.

Last Asgn Start	This field is populated with the date the assignment was started.
Term Date	This field is populated with the termination date of the assignment.
Person of Interest Instance	
Person Of Interest Type	This field is populated with the person of interest type.
Empl Rcd#	This field is populated with the employee record number.
Status	This field is populated with the person of interest's status.
Begin Date/	This field is populated with the begin date of the person of interest.
End Date	This field is populated with the end date of the person of interest.

7. At this point the following options are available:

Step	Description
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Expiration Inquiry

This component allows the user to view expiration data for a person.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Expiration Inquiry*** component. The Expiration Inquiry page (**Figure 52**) is displayed.

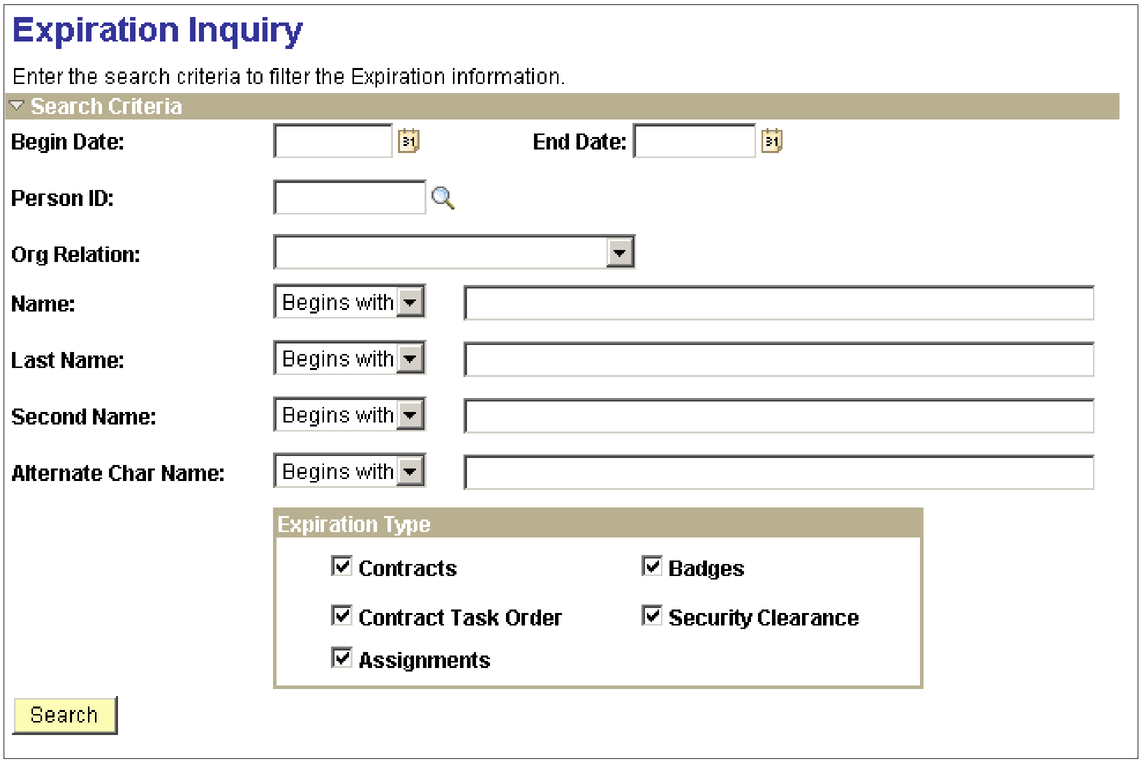


Figure 52. Expiration Inquiry page

4. Complete the fields as follows:

Search Criteria	
Begin Date	Enter the begin date or select a date by clicking the calendar icon.
End Date	Enter the end date or select a date by clicking the calendar icon.
Person ID	Enter the person ID or select an ID by clicking the search icon.
Org Relation	Select the org relation from the drop-down list. The valid values are **`Contingent Worker`**, **`Employee`**, or **`Person Of Interest`**.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's second name if applicable.
Alternate Char Name	Enter the employee's alternate character name if applicable.
Expiration Type	
Contracts	Check this box if applicable.
Contract Task Order	Check this box if applicable.
Assignments	Check this box if applicable.

Badges	Check this box if applicable.
Security Clearance	Check this box if applicable.

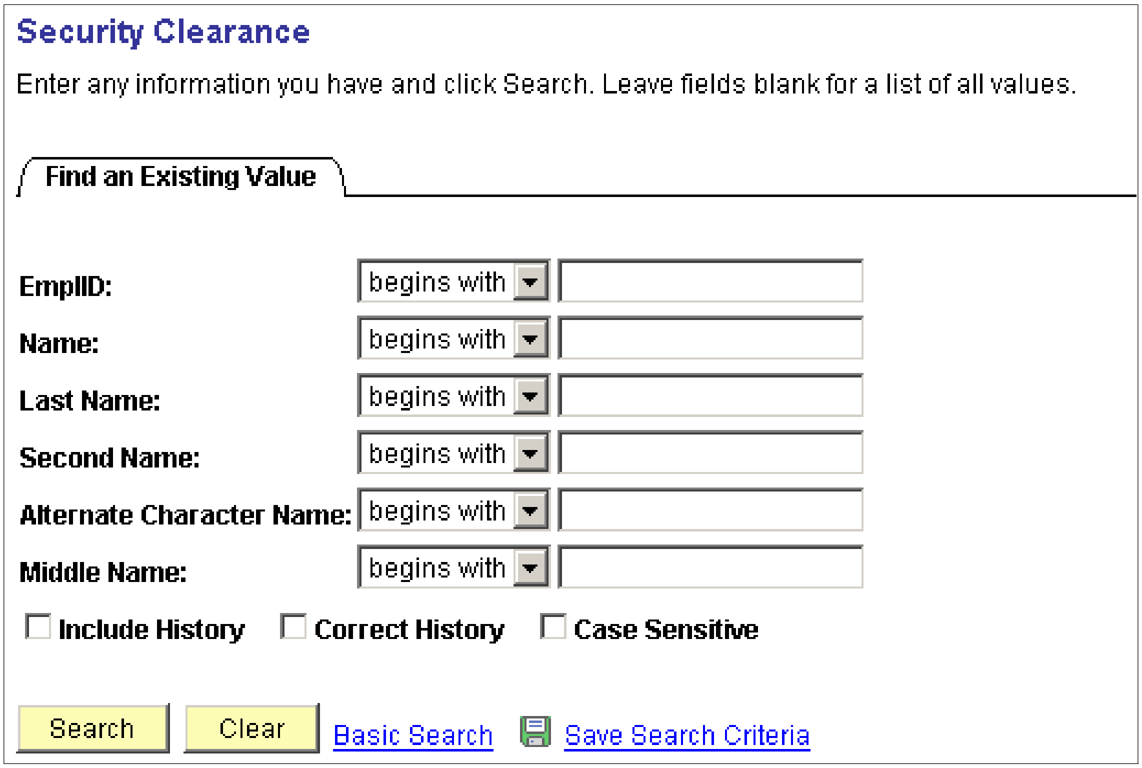
5. Click **Search**. The search results for the criteria entered is displayed at the bottom of the page.

Security

This section contains the following topics:

Security Clearance

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Security Clearance*** component. The Find an Existing Value tab - Security Clearance page (**Figure 53**) is displayed.



Security Clearance

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

Find an Existing Value

EmplID: begins with
Name: begins with
Last Name: begins with
Second Name: begins with
Alternate Character Name: begins with
Middle Name: begins with

Include History   Correct History   Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

Figure 53. Find an Existing Value tab - Security Clearance page

4. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.

Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Security Clearance tab - Security Clearance page (**Figure 54**) is displayed.

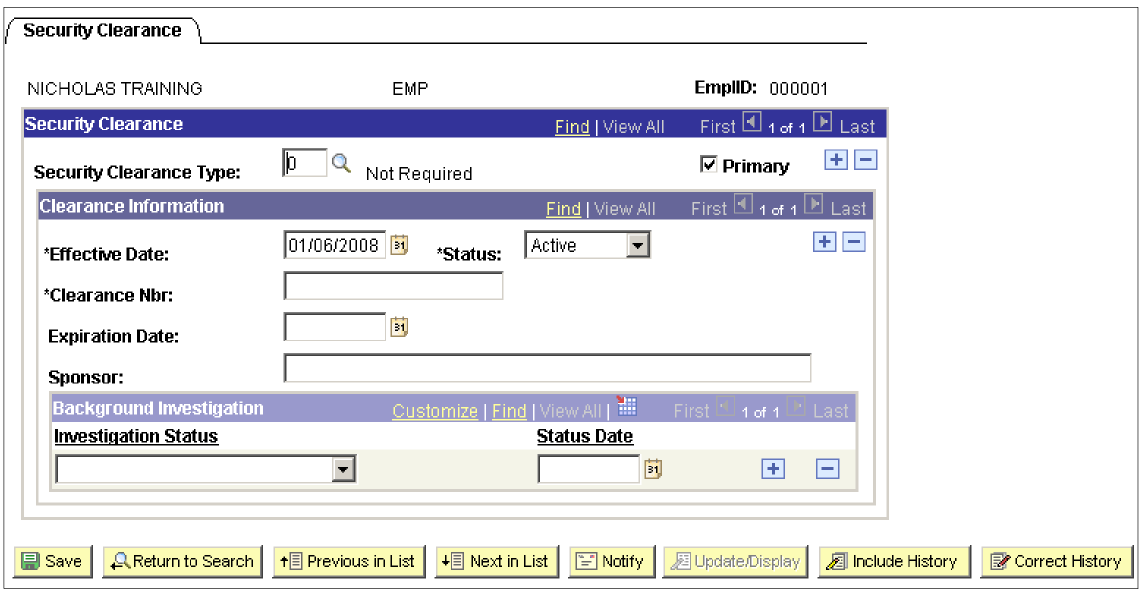


Figure 54. Security Clearance tab - Security Clearance page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
EmplID	This field is populated with employee ID assigned to the employee.
Security Clearance	
Security Clearance Type	Enter the security clearance type or select a type by clicking on the search icon.
Primary	Check this box if applicable.

Clearance Information	
Effective Date	Enter the effective date or select a date by clicking on the calendar icon.
Status	Select a status from the drop-down menu. The valid values are `Active` and `Inactive`.
Clearance Nbr	Enter the clearance number.
Expiration Date	Enter the expiration date or select a date by clicking on the calendar icon.
Sponsor	Enter the sponsor.
Background Investigation	
Investigation Status	Select the investigation status from the drop-down list.
Status Date	Enter the status date or select a date by clicking the calendar icon.

8. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Badge

This component identifies the type of badge and number for a person.

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Personal Information*** menu.

3. Select the ***Badge*** component. The Find an Existing Value tab - Badge page (**Figure 55**) is displayed.

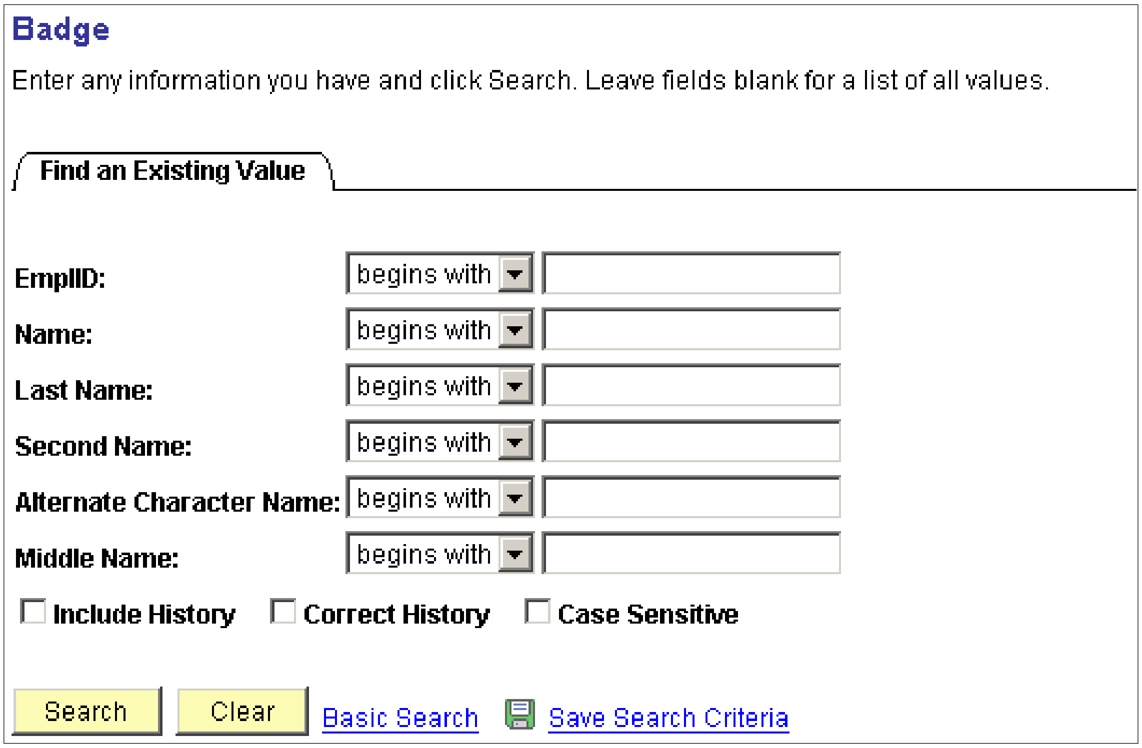


Figure 55. Find an Existing Value tab - Badge page

4. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Badge tab - Badge page (**Figure 56**) is displayed.

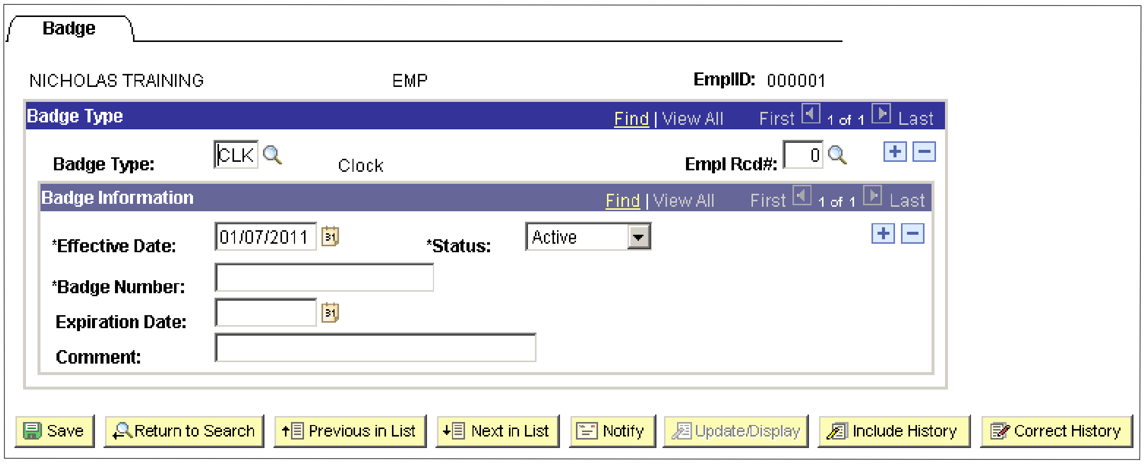


Figure 56. Badge tab - Badge page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
EmplID	This field is populated with employee ID assigned to the person.
Badge Type	
Badge Type	Enter the badge type or select a type by clicking the search icon.
Empl Rcd#	Enter the employee record number or select a number by clicking the search icon.
Badge Information	
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select a status from the drop-down menu. The valid values are **`Active`** or **`Inactive`**.
Badge Number	Enter the badge number.
Expiration Date	Enter the expiration date or select a date by clicking the calendar icon.
Comment	Enter the applicable comments.

8. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Step	Description
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Badge/Clearance Access Summary

This component displays a summary of all the badge, security clearance, and email address details for a person.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personnel Information*** menu.
3. Select the ***Badge/Clearance Access Summary*** component. The Find an Existing Value tab - Badge/Clearance Access Summary page (**Figure 57**) is displayed.

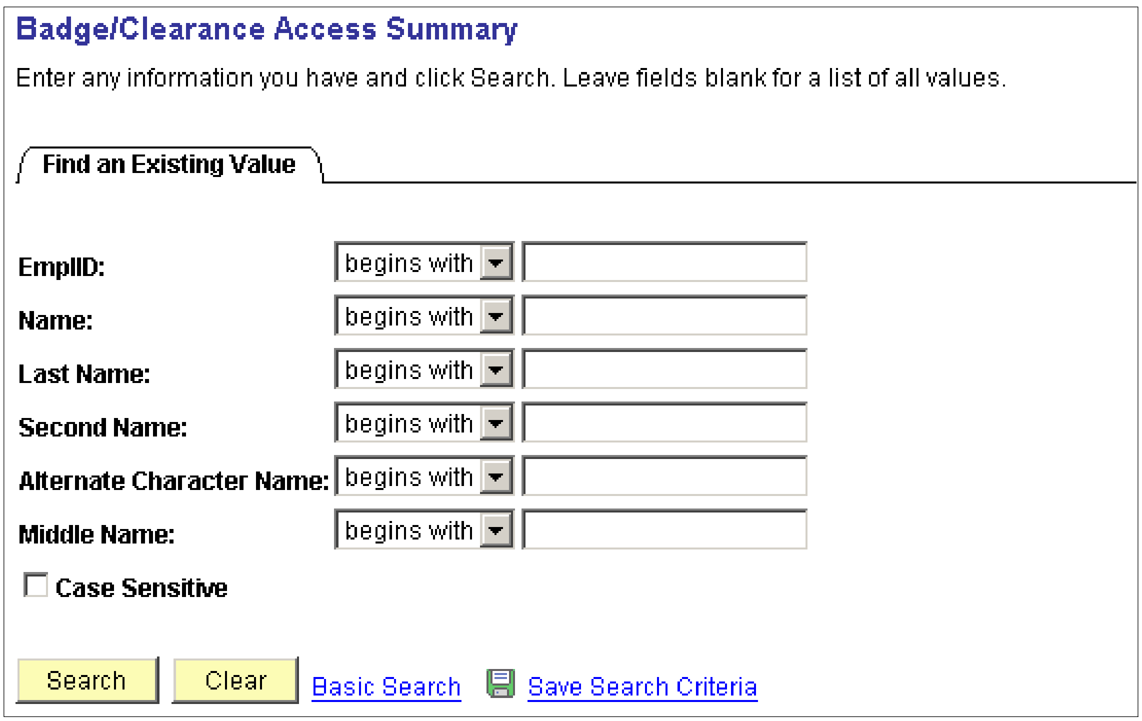


Figure 57. Find an Existing Value tab - Badge/Clearance Access Summary page

4. Complete the fields as follows:

EmplID	Enter the employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.

Middle Name	Enter the employee's middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Badge History tab - Badge/Clearance Access Summary page (**Figure 58**) is displayed.

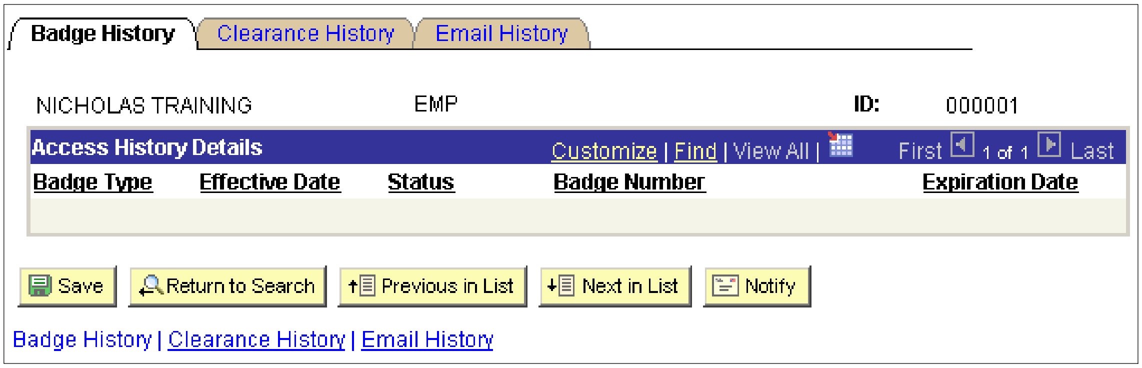


Figure 58. Badge History tab - Badge/Clearance Access Summary page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
EmplID	This field is populated with the employee ID assigned to the person.
Person	This field displays the person's relationship to the organization.
Access History Details	
Badge Type	This field is populated with the type of badge assigned to the employee.
Effective Date	This field is populated with date the badge was issued.
Status	This field is populated with the status of the badge.
Badge Number	This field is populated with the employee's badge number.
Expiration Date	This field is populated with the expiration date of the employee's badge.

8. Click the ***Clearance History*** tab. The Clearance History tab - Badge/Clearance Access Summary page (**Figure 59**) is displayed.

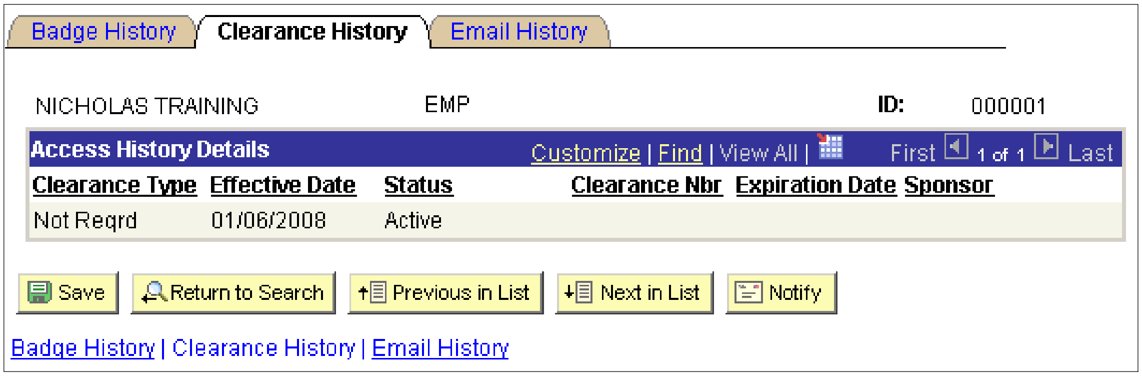


Figure 59. Clearance History tab - Badge/Clearance Access summary page

9. Complete the fields as follows:

Name	This field is populated with the employee's name.
EmplID	This field is populated with employee ID assigned to the person.
Person	This field displays the person's relationship to the organization.
Access History Details	
Clearance Type	This field is populated with the type of security clearance assigned to the employee.
Effective Date	This field is populated with the date the security access was granted.
Status	This field is populated with the status of the employee's access.
Clearance Number	This field is populated with the employee's clearance number.
Expiration Date	This field is populated with the expiration date of the employee's security access.
Sponsor	This field is populated with the name of the employee's sponsor.

10. Click the ***Email History*** tab. The Email History tab - Badge/Clearance Access Summary page (**Figure 60**) is displayed.

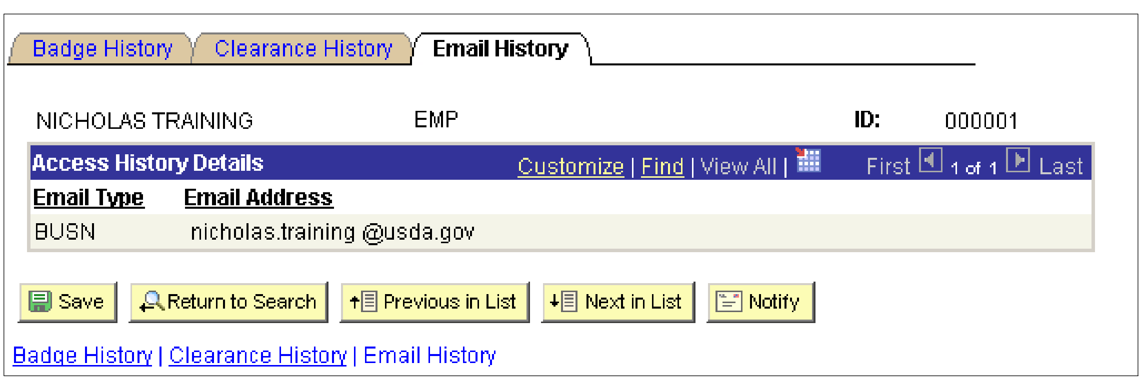


Figure 60. Email History tab - Badge/Clearance Access Summary page

11. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person	This field displays the person's relationship to the organization.
ID	This field is populated with employee ID assigned to the person.
Access History Details	
Email Type	This field is populated with the type of email address of the employee.
Email Address	This field is populated with the email address of the employee.

12. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Search

This section contains the following topics:

Search for People

The search for people component allows the user to search for an existing person.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Search for People*** component. Search/Match page (**Figure 61**) is displayed.

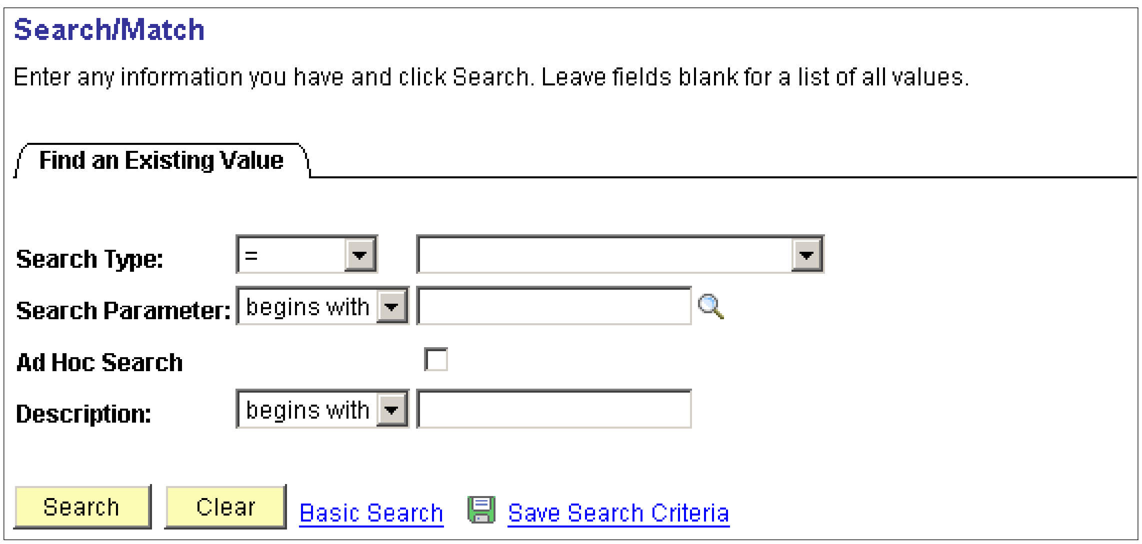


Figure 61. Search/Match page

4. Complete the fields as follows:

Search Type	Select the type of search from the drop-down menu then enter the applicable search criteria. Valid values are **`Applicant`**, **`Organization`**, or **`Person`**.
Search Parameter	Enter the search parameter or select a parameter by clicking the search icon.
Ad Hoc Search	Check this box if applicable.
Description	Enter the description.

5. Click **Search**. Select the applicable value from the search results. The Search Criteria page is displayed (**Figure 16**). See **Search for Matching Persons** for more information.

Emergency Contacts

The emergency contacts component allows HR office users to enter and view emergency contact information for employees, contingent workers, and persons of interest.

To enter/view emergency contacts:

1. Select the ***HR Reports*** menu group.
2. Select the ***Emergency Contacts*** component. The Find An Existing Value tab - Emergency Contact page (**Figure 62**) is displayed.

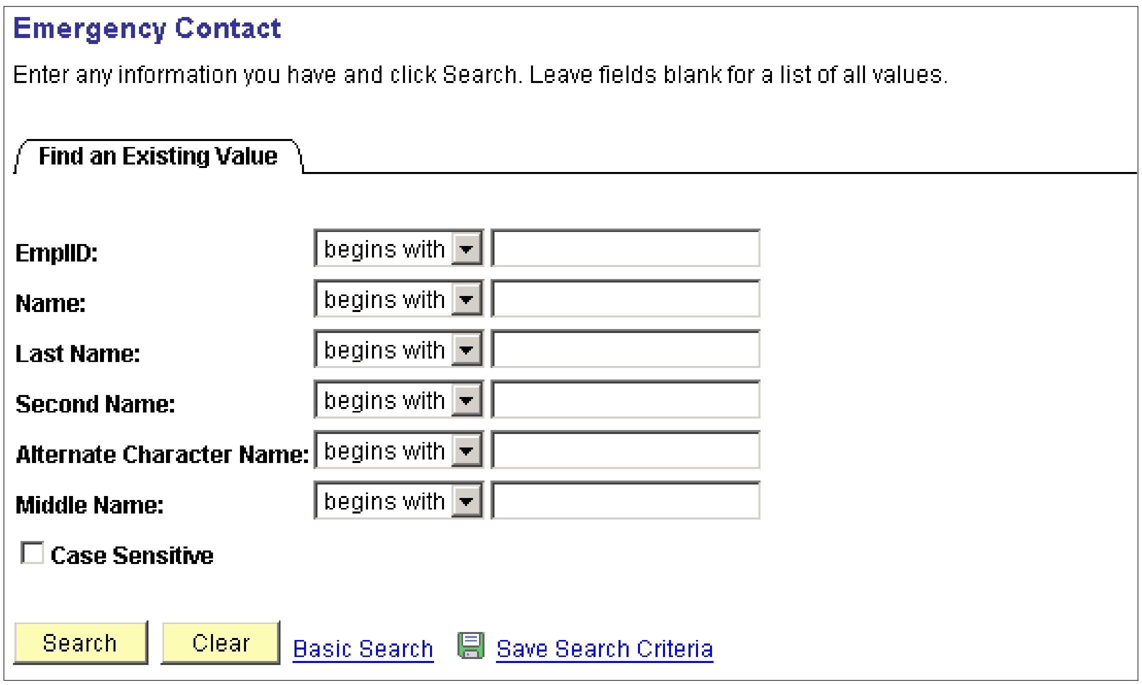


Figure 62. Find An Existing Value tab - Emergency Contact page

3. Complete the fields as follows:

EmplID	Enter the Employee ID.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Case Sensitive	Check this box if applicable.

4. Click **Search** to search for the values entered. The Contact Address/Phone tab - Emergency Contact page (**Figure 63**) is displayed.

OR

Click **Clear** to clear all entries.

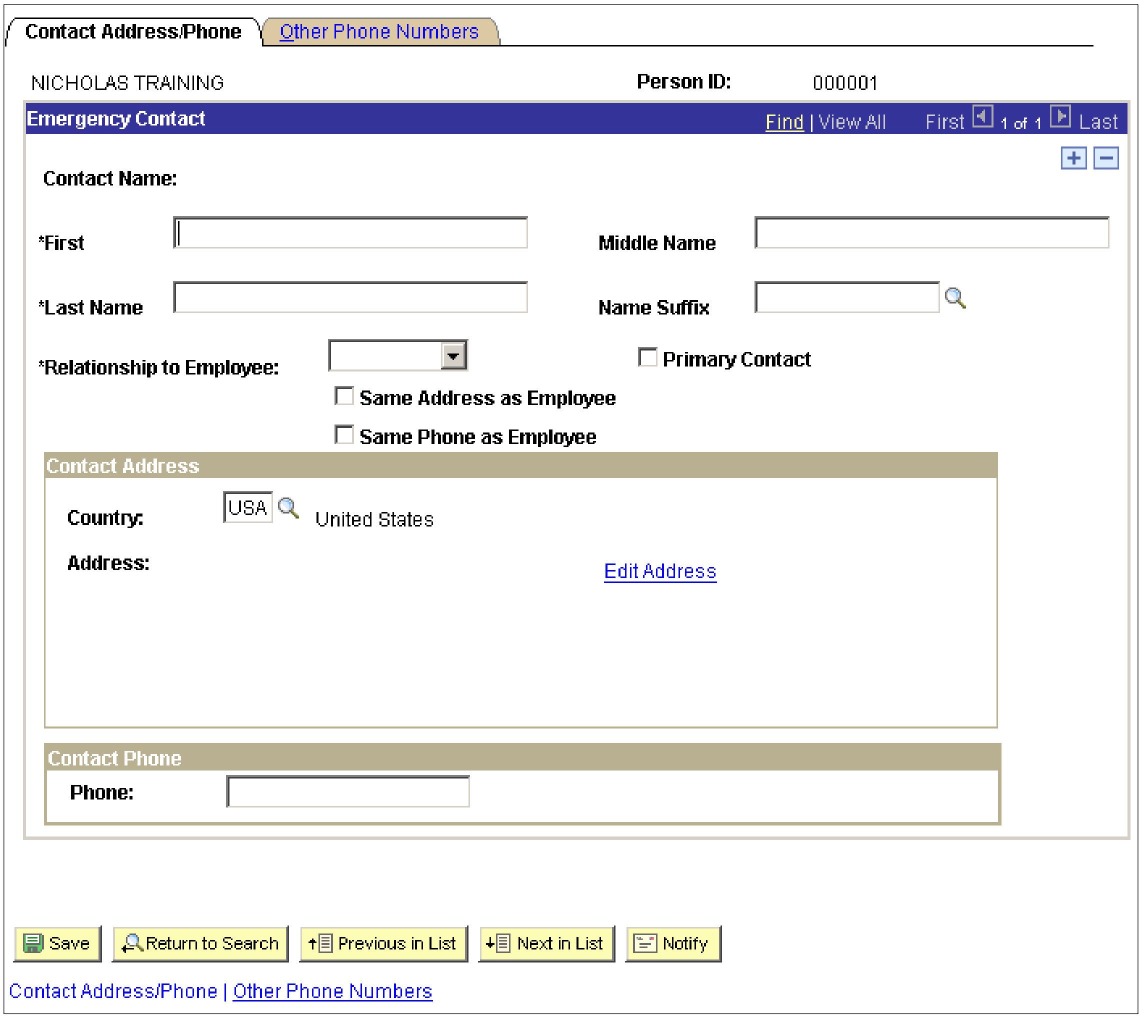


Figure 63. Contact Address/Phone tab - Emergency Contact page

5. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Emergency Contact	
First Name	Enter the emergency contact's first name.
Middle Name	Enter the emergency contact's middle name.
Last Name	Enter the emergency contact's last name.

Name Suffix	Enter the name suffix or select a suffix by clicking the search icon.
Relationship to Employee	Select the emergency contact's relationship to the employee from the drop-down list.
Primary Contact	Check this box if this is the primary contact for this person.
Same Address as Employee	Check this box if this contact has the same address as the employee.
Same Phone as Employee	Check this box if this contact has the same phone number as the employee.
Contact Address	
Country	Enter the country or select a country by clicking the search icon.
Address	This field is populated with information from the ***Edit Address*** link. For more information, see **Add Address**.
Contact Phone	
Phone	Enter the phone number for the emergency contact being added.

6. Click the Other Phone Numbers tab. The Other Phone Numbers tab - Emergency Contact page (**Figure 64**) is displayed.

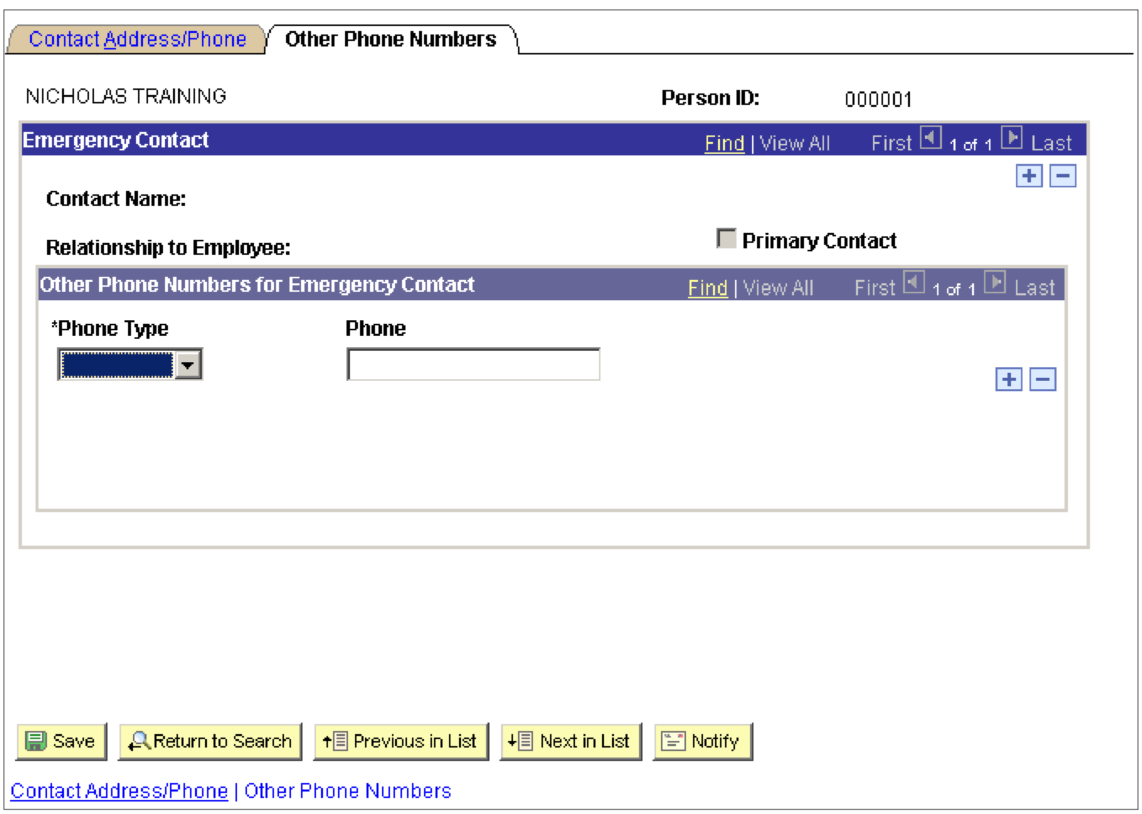


Figure 64. Other Phone Numbers tab - Emergency Contact page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Emergency Contact	
Contact Name	This field is populated with the information entered on the Contact Address/Phone tab (**Figure 63**).
Relationship to Employee	This field is populated with the information entered on the Contact Address/Phone tab (**Figure 63**).
Primary Contact	This field is populated with the information entered on the Contact Address/Phone tab (**Figure 63**).
Other Phone Numbers for Emergency Contact	
Phone Type	Select the type of phone number from the drop-down list.
Phone	Enter the applicable phone number for the emergency contact.

8. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.

Contract Administration

The contract administration component allows administrators to maintain contracts or other written agreements with employees and contractors.

This section contains the following topics:

Update Contracts

This component allows administrators to identify contract status, content, special clauses, person responsible for contract, and probation information.

To update a contract:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Update Contracts*** component. The Find an Existing Value tab - Update Contracts page (**Figure 65**) is displayed.

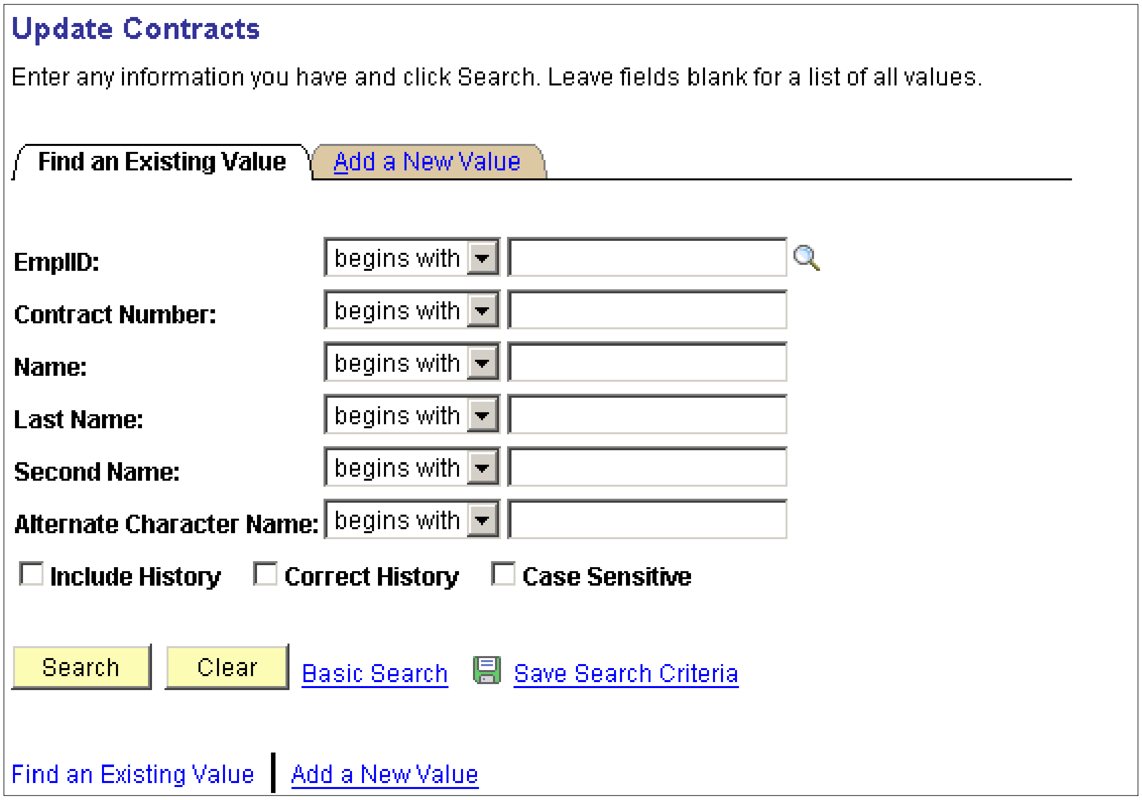


Figure 65. Find an Existing Value tab - Update Contracts page

5. Complete the fields as follows:

EmplID	Enter the Employee ID.
Contract Number	Enter the contract number.
Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Second Name	Enter the employee's middle name.
Alternate Character Name	Enter the employee's nickname.
Middle Name	Enter the employee's middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered then select the applicable value from the search results. The Contract Status/Content tab - Update Contracts page (**Figure 67**) is displayed.

   OR

Click **Clear** to clear all entries.

OR

Click the ***Add a New Value*** tab. The Add a New Value tab - Update Contracts page (**Figure 66**) is displayed.

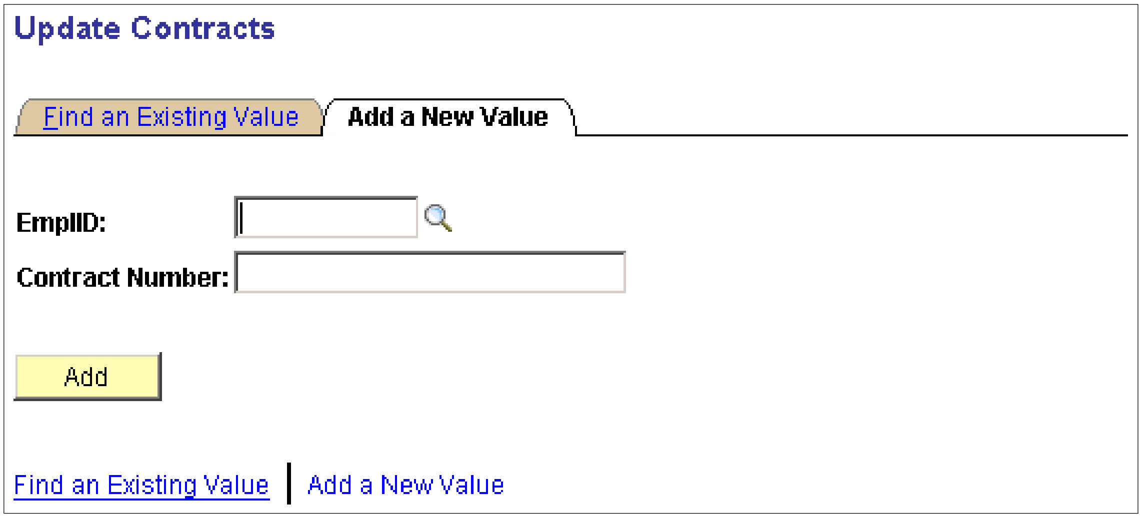


Figure 66. Add a New Value tab - Update Contracts page

7. Complete the fields as follows:

EmplID	Enter the Employee ID.
Contract Number	Enter the contract number.

8. Click **Add**. The Contract Status/Content tab - Update Contracts page (**Figure 67**) is displayed.

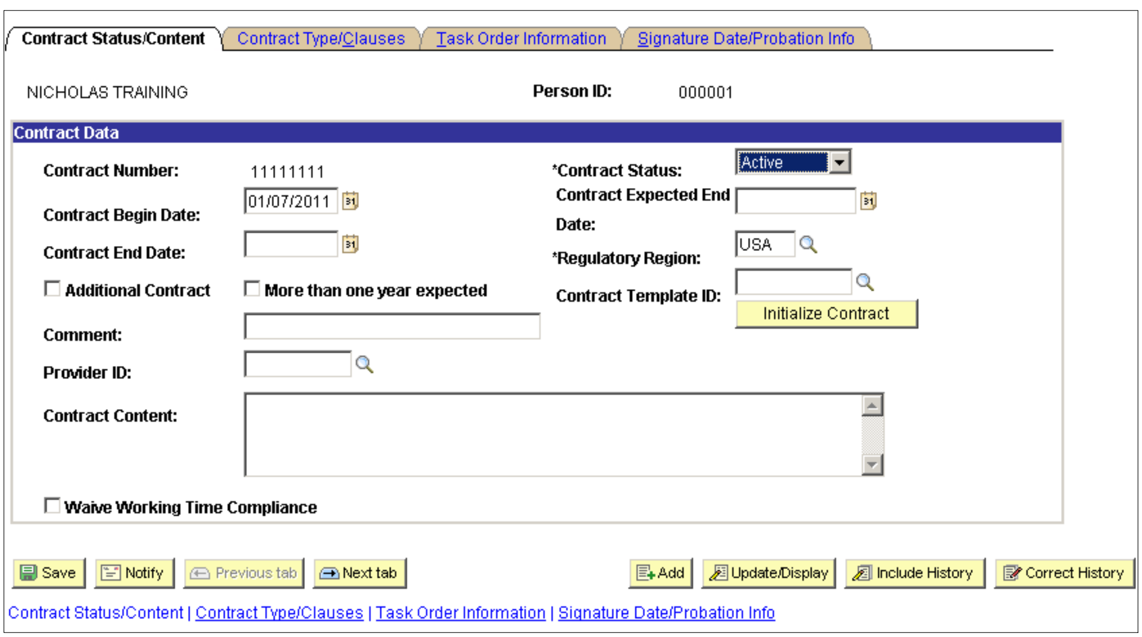


Figure 67. Contract Status/Content tab - Update Contracts page

9. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Contract Data	
Contract Number	This field is populated with the contract number.
Contract Status	Select the contract status from the drop-down menu. The valid values are `Active` and `Inactive`.
Contract Begin Date	Enter the contract begin date or select a date by clicking on the calendar icon.
Contract Expected End Date	Enter the date the contract is expected to end or select a date by clicking on the calendar icon.
Contract End Date	Enter the contract end date or select a date by clicking on the calendar icon.
Regulatory Region	Enter the regulatory region or select a region by clicking the search icon.
Additional Contract	Check this box if applicable.
More Than One Year Expected	Check this box if applicable.
Contract Template ID	Enter the contract template ID or select an ID by clicking the search icon.
Comment	Enter the applicable comments.
Provider ID	Enter the provider ID or select an ID by clicking the search icon.
Contract Content	Enter the contract content.
Waive Working Time Compliance	Check this box if applicable.

10. Click the ***Contract Type/Clauses*** tab. The Contract Type/Clauses tab - Update Contract page (**Figure 68**) is displayed.

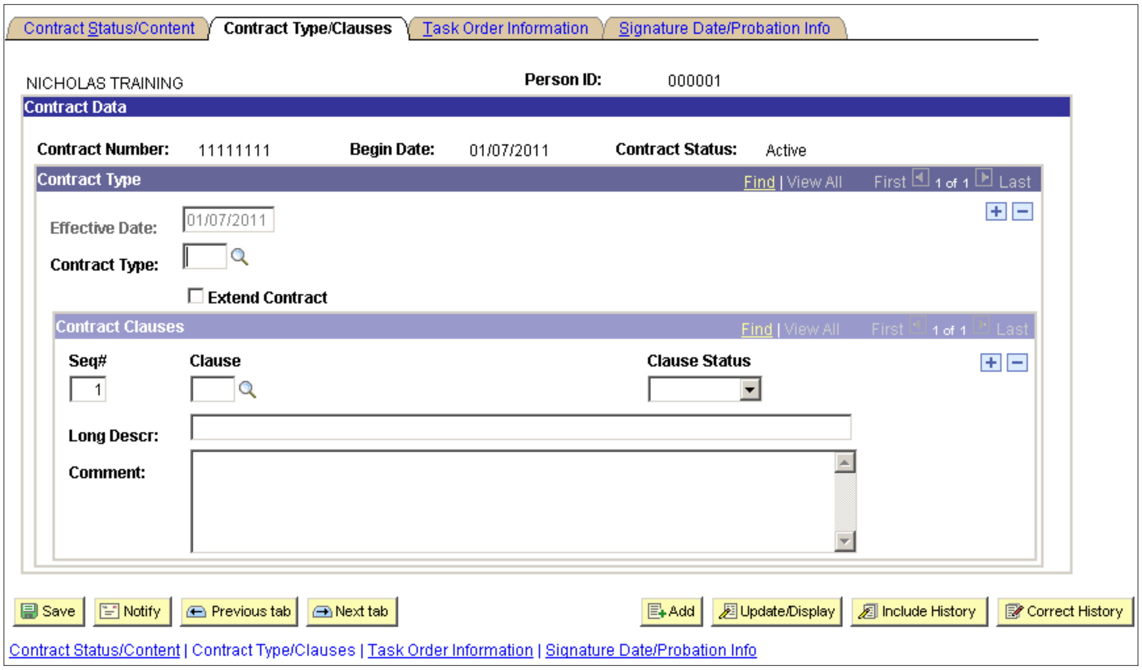


Figure 68. Contract Type/Clauses tab - Update Contract page

11. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Contract Data	
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Contract Begin Date	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Contract Type	
Effective Date	This field is populated.
Contract Type	Enter the contract type or select a type by clicking on the search icon.
Extend Contract	Check this box if applicable.
Contract Clauses	
Seq #	Enter the sequence number.
Clause	Enter the clause or select a clause by clicking the search icon.

Clause Status	Select the clause status from the drop-down menu. The valid values are `Optional` and `Required`.
Long Descr	Enter the long description.
Comment	Enter the applicable comments.

12. Click the ***Task Order Information*** tab. The Task Order Information tab - Update Contract page (**Figure 69**) is displayed.

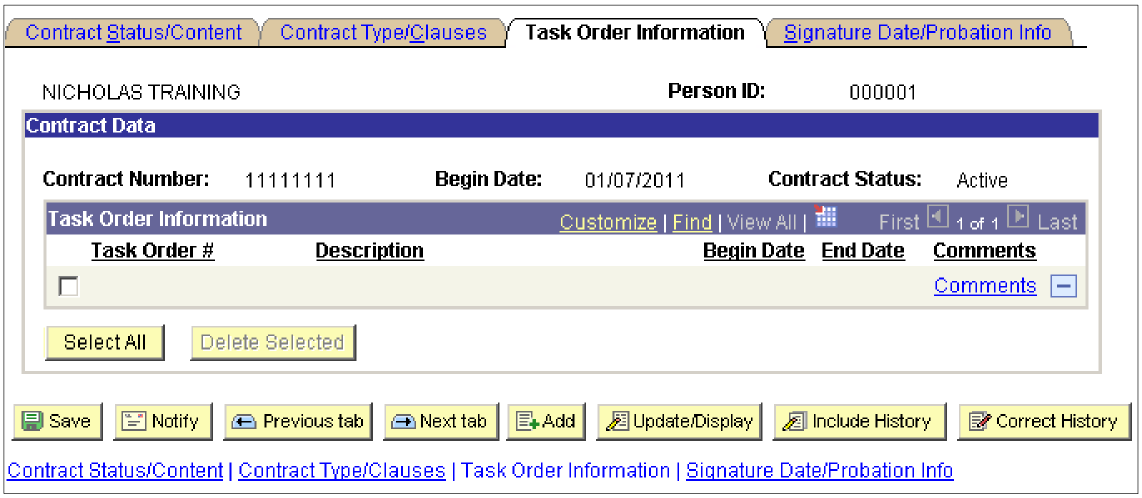


Figure 69. Task Order Information tab - Update Contract page

13. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Contract Data	
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Begin Date	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Task Order #	This field is populated based on the contract template ID entered or selected on the Contract Status/Content tab (**Figure 67**).
Description	This field is populated based on the contract template ID entered or selected on the Contract Status/Content tab (**Figure 67**).
Begin Date	This field is populated based on the contract template ID entered or selected on the Contract Status/Content tab (**Figure 67**).

End Date	This field is populated based on the contract template ID entered or selected on the Contract Status/Content tab (**Figure 67**).
Comments	This field provides a link to enter any applicable comments.

14. Click the ***Signature Date/Probation Info*** tab. The Signature Date/Probation Info tab - Update Contract page (**Figure 70**) is displayed.

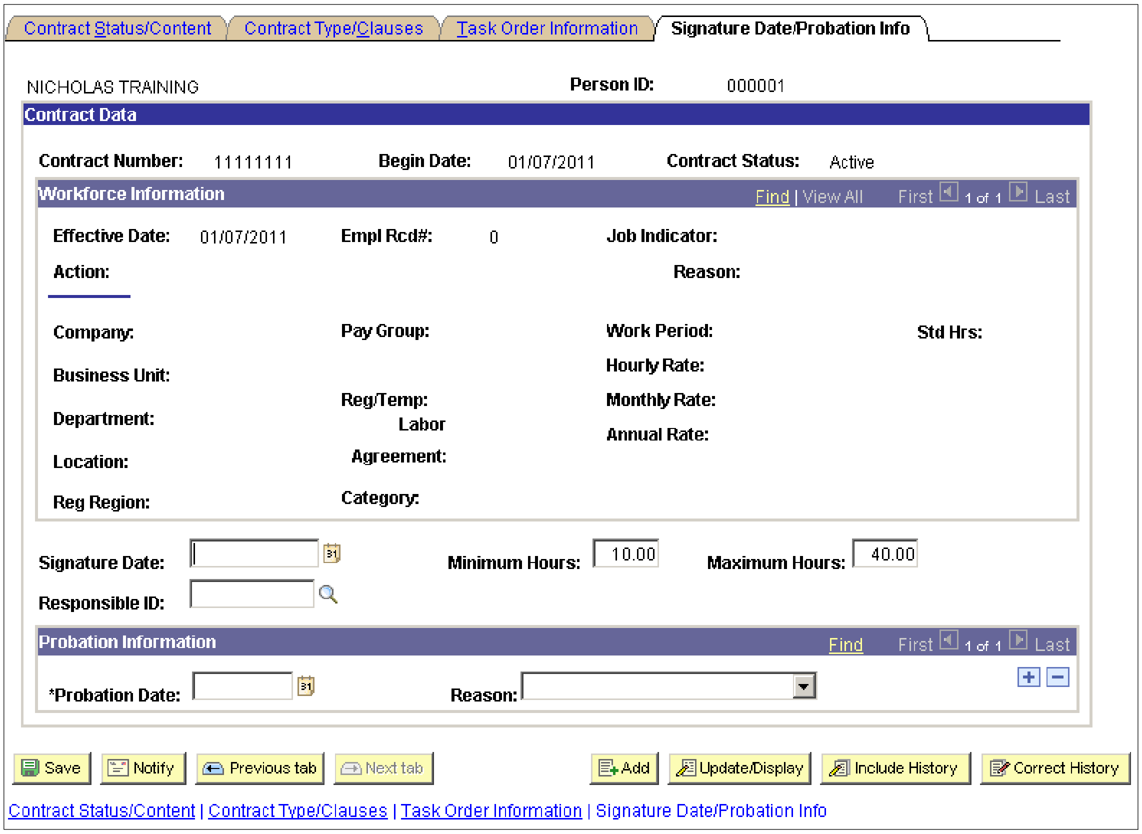


Figure 70. Signature Date/Probation Info tab - Update Contract page

15. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person ID	This field is populated with the person ID assigned to the person.
Contract Data	
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Begin Date	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 67**).

Effective Date	This field is populated with information from the Job Data component.
Empl Rcd#	This field is populated with information from the Job Data component.
Job Indicator	This field is populated with information from the Job Data component.
Action	This field is populated with information from the Job Data component.
Reason	This field is populated with information from the Job Data component.
Company	This field is populated with information from the Job Data component.
Pay Group	This field is populated with information from the Job Data component.
Work Period	This field is populated with information from the Job Data component.
Std Hrs	This field is populated with information from the Job Data component.
Business Unit	This field is populated with information from the Job Data component.
Hourly Rate	This field is populated with information from the Job Data component.
Department	This field is populated with information from the Job Data component.
Reg/Temp	This field is populated with information from the Job Data component.
Monthly Rate	This field is populated with information from the Job Data component.
Location	This field is populated with information from the Job Data component.
Labor Agreement	This field is populated with information from the Job Data component.
Annual Rate	This field is populated with information from the Job Data component.
Reg Region	This field is populated with information from the Job Data component.
Category	This field is populated with information from the Job Data component.
Signature Date	Enter the signature date or select a date by clicking the calendar icon.
Minimum Hours	Enter the minimum number of hours.
Maximum Hours	Enter the maximum number of hours.
Responsible ID	Enter the company agent who drafted the contract and who is responsible for its language or select an agent by clicking the search icon.
Probation Date	Enter the probation date or select a date by clicking the calendar icon. The date entered will be displayed on the job data record for this person.
Reason	Select a reason from the drop-down menu. The valid values are **New Date Needed** and **Unsatisfactory Performance**.

16. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Notify**.	To send a notification.
Click **Previous Tab**.	To go back to the previous tab on the page.
Click **Add**.	To add a new value.
Click **Update Display**.	To update the page.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Define Contract Types

This component allows administrators to identify the types of contracts issued.

To define a contract type:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Define Contract Types*** component. The Find an Existing Value tab - Define Contract Types page (**Figure 71**) is displayed.

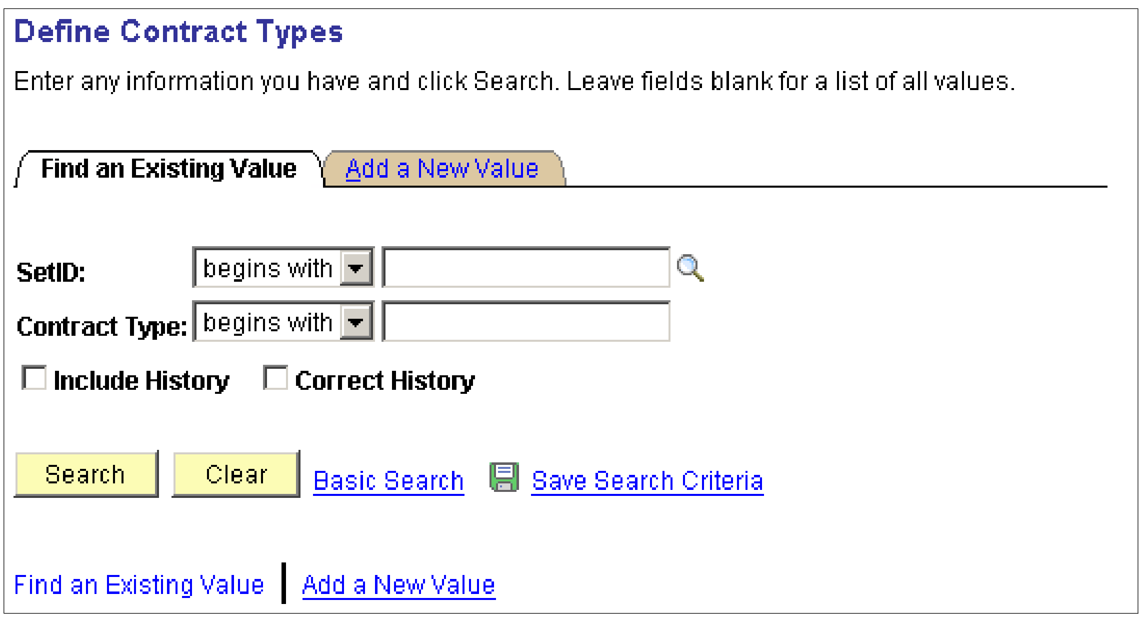


Figure 71. Find an Existing Value tab - Define Contract Types page

5. Complete the fields as follows:

SetID	Enter the SetID or select an ID by clicking the search icon.
Contract Type	Enter the contract type.

Include History	Check this box if applicable.
Correct History	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

   OR

7. Click the ***Add A New Value*** tab. The Add A New Value tab - Define Contract Types page (**Figure 72**) is displayed.

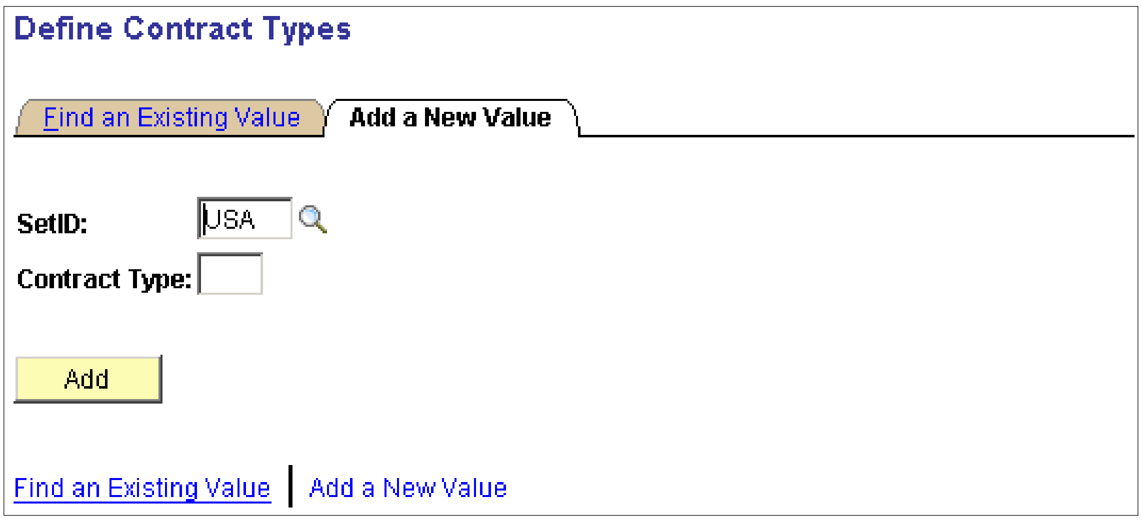


Figure 72. Add a New Value tab - Define Contract Types page

8. Complete the fields as follows:

SetID	Enter the SetID or select an ID by clicking the search icon.
Contract Type	Enter the contract type.

9. Click **Add**. The Contract Type Table page (**Figure 73**) is displayed.

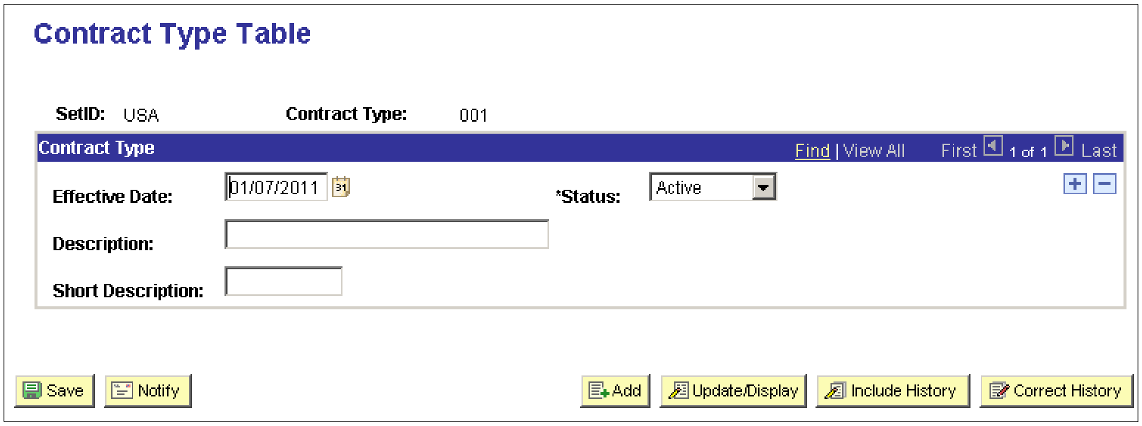


Figure 73. Contract Type Table page

10. Complete the fields as follows:

SetID	This field is populated with the setID entered or selected in the search criteria.
Contract Type	This field is populated with the contract type entered or selected in the search criteria.
Contract Type	
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are `Active` and `Inactive`.
Description	Enter the description of the contract type.
Short Description	Enter the short description of the contract type.

11. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Notify**.	To send a notification.
Click **Previous Tab**.	To go back to the previous tab on the page.
Click **Add**.	To add a new value.
Click **Update Display**.	To update the page.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Define Contract Clauses

This component allows administrators to define contract clause details.

To define a contract clause:

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Job Information*** menu.

3. Select the ***Contract Administration*** menu item.

4. Select the ***Define Contract Clauses*** component. The Find an Existing Value tab - Define Contract Clauses page (**Figure 74**) is displayed.

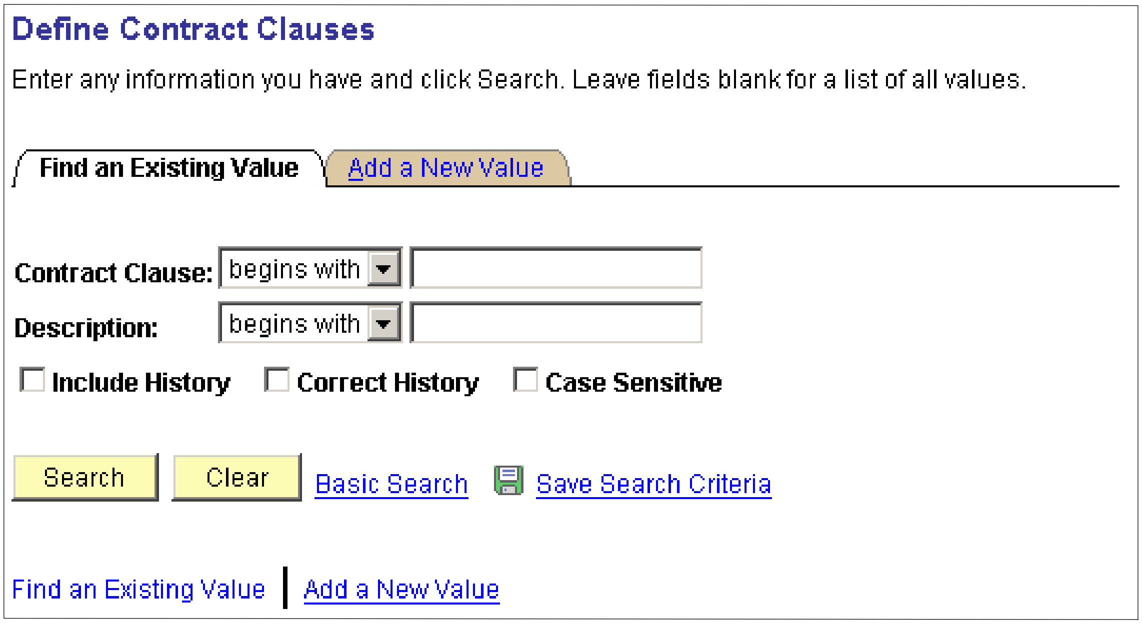


Figure 74. Find an Existing Value tab - Define Contract Clauses page

5. Complete the fields as follows:

Contract Clause	Enter the contract clause.
Description	Enter the description.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered. Select the applicable value. The Contract Clause Table tab - Define Contract Clauses page (**Figure 76**) is displayed.

   OR

   Click **Clear** to clear all entries.

   OR

   Click the ***Add a New Value*** tab. The Add a New Value tab - Define Contract Clauses page (**Figure 75**) is displayed.

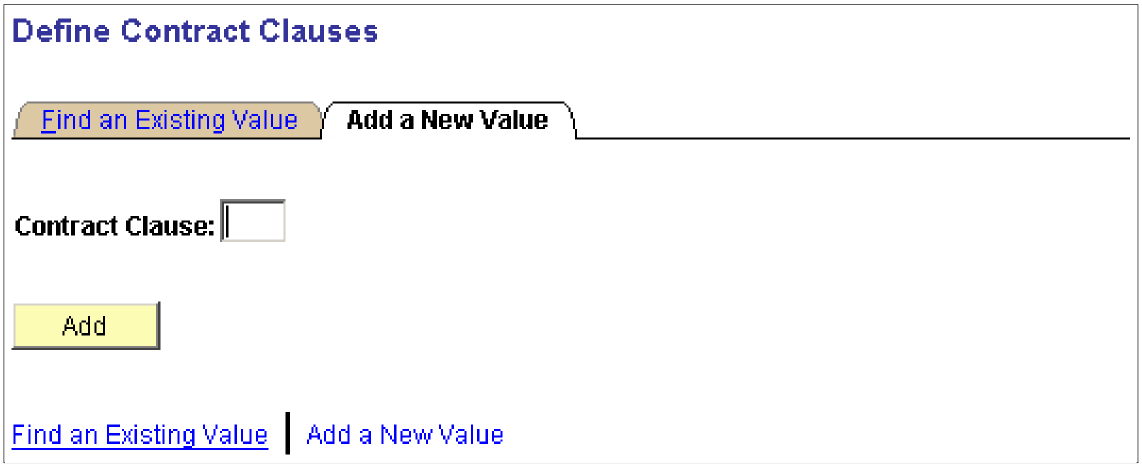


Figure 75. Add a New Value tab - Define Contract Clauses page

7. Complete the field as follows:

Contract Clause	Enter the contract clause.

8. Click **Add** to add the new value entered. The Contract Clause Table tab - Define Contract Clauses page (**Figure 76**) is displayed.

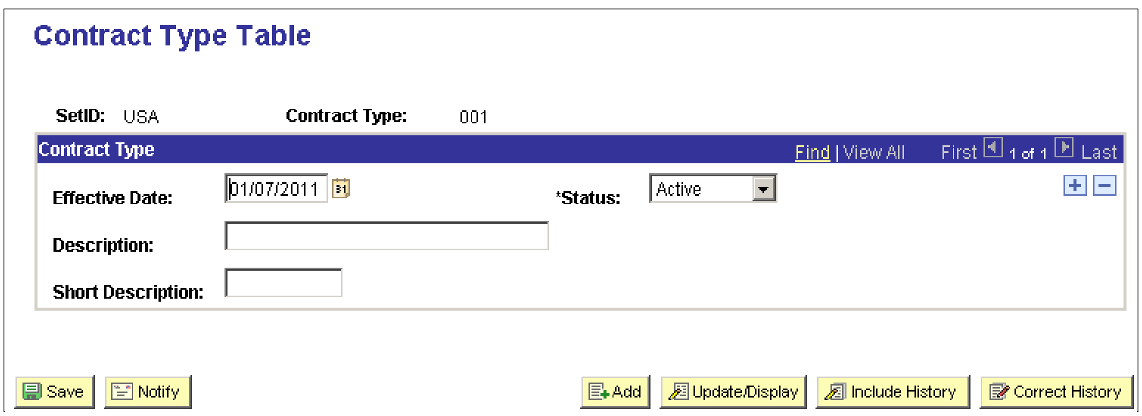


Figure 76. Contract Clause Table tab - Define Contract Clauses page

9. Complete the fields as follows:

Contract Clause	This field is populated with the contract clause entered or selected in the search criteria.
Contract Clause	
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are `Active` and `Inactive`.
Short Description	Enter the short description.

Long Description	Enter the long description.
Comment	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Previous In List**.	To go back to the previous person in the list.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.
Click **Add**.	To add a new value.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Define Contract Templates

This component allows administrators to define a contract template by identifying a contract type and family and the clauses included within the contract.

To define a contract template:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Define Contract Templates*** component. The Find an Existing Value tab - Define Contract Templates page (**Figure 77**) is displayed.

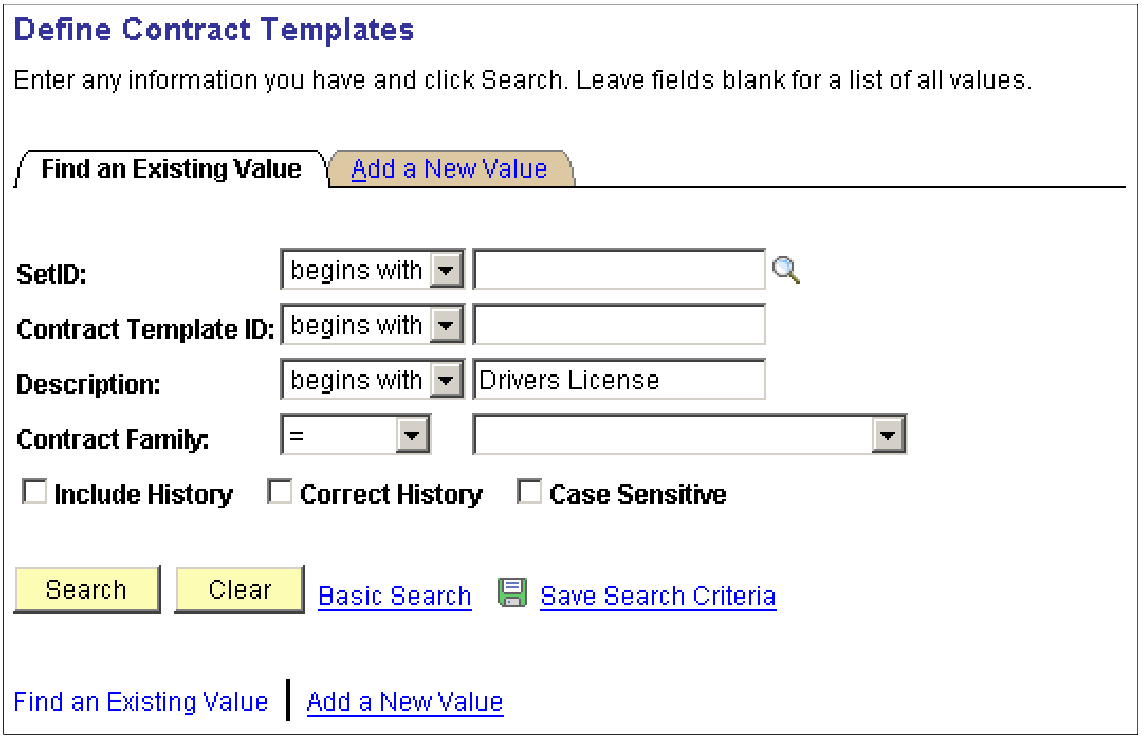


Figure 77. Find an Existing Value tab - Define Contract Templates page

5. Complete the fields as follows:

SetID	Enter the SetID or select an ID by clicking the search icon.
Contract Template ID	Enter the contract template ID.
Description	Enter the description.
Contract Family	Select the contract family from the drop-down menu. The valid values are **`Regular`** and **`Temporary`**.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered. Select the applicable value. The Contract Template Table page (**Figure 79**) is displayed.

   OR

   Click **Clear** to clear all entries.

   OR

   Click the ***Add a New Value*** tab. The Add a New Value tab - Define Contract Templates page (**Figure 78**) is displayed.

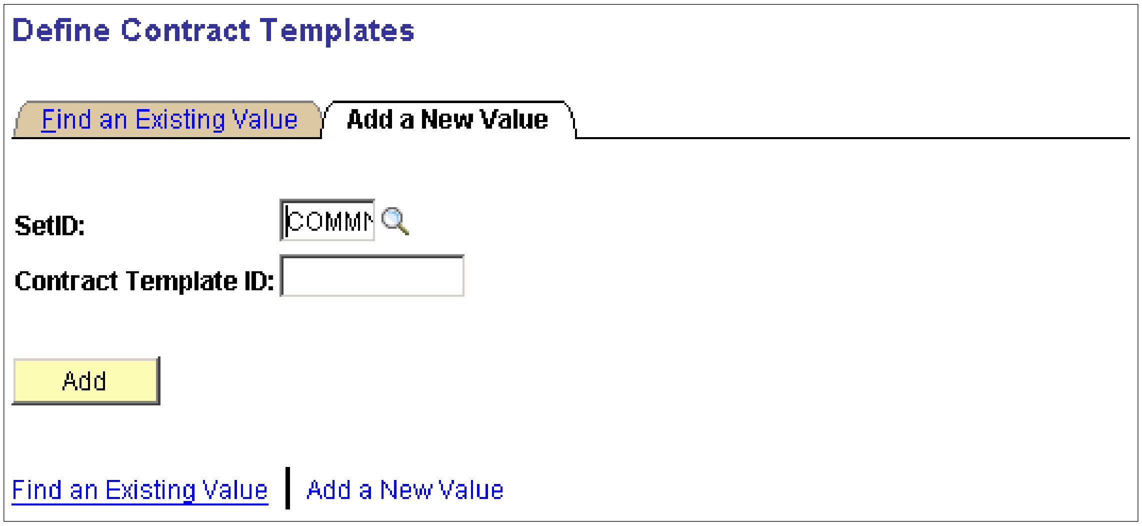


Figure 78. Add A New Value tab - Define Contract Templates page

7. Complete the fields as follows:

SetID	Enter the SetID or select an ID by clicking the search icon.
Contract Template ID	Enter the contract template ID.

8. Click **Add** to add the new value entered. The Contract Template Table page (**Figure 79**) is displayed.

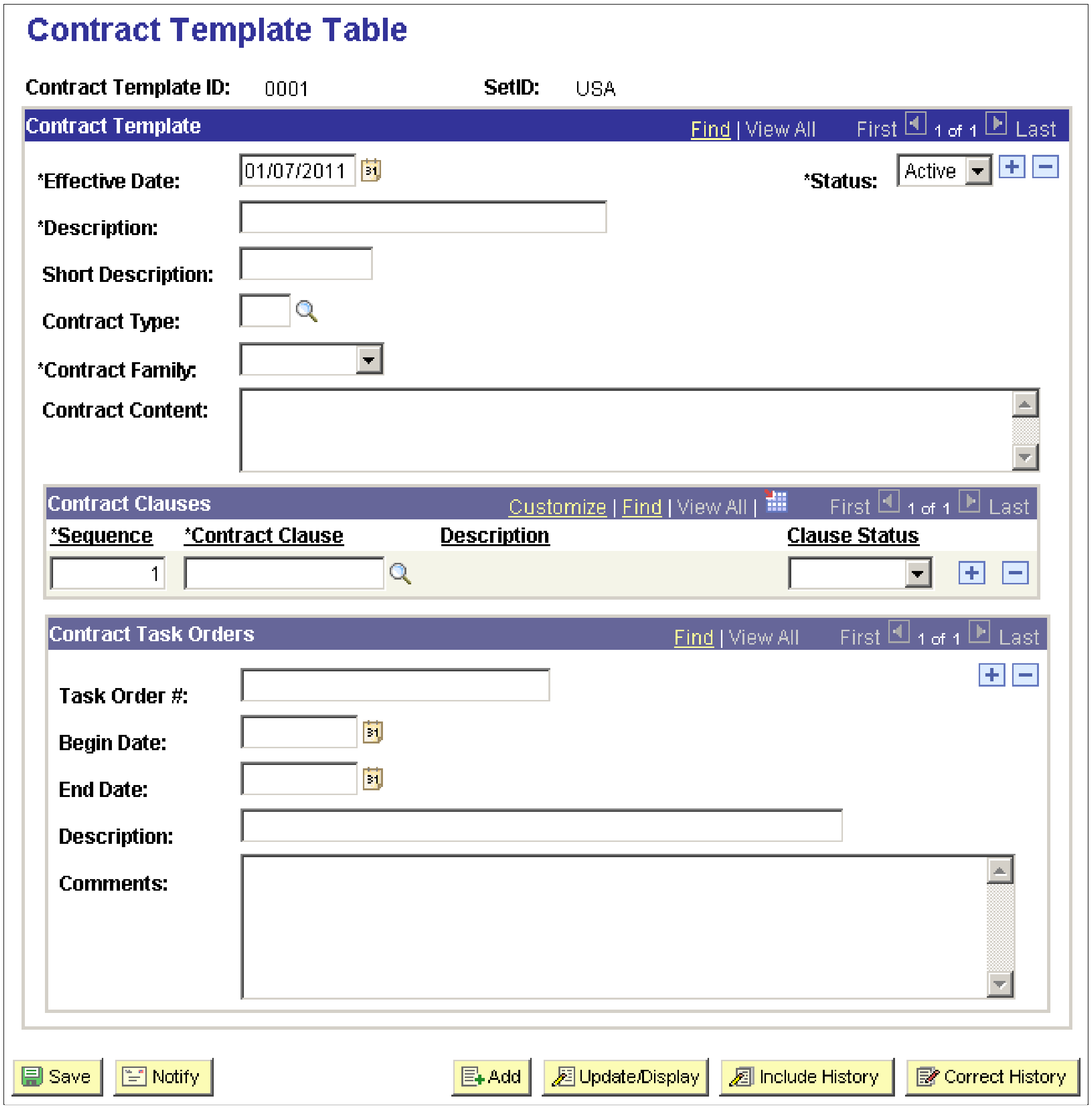


Figure 79. Contract Template Table page

9. Complete the fields as follows:

Contract Template ID	This field is populated with the contract template ID entered or selected in the search criteria.
SetID	This field is populated with the setID entered or selected in the search criteria.
Contract Template	
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are `Active` and `Inactive`.

Description	Enter the description.
Short Description	Enter the short description.
Contract Type	Enter the contract type or select a type by clicking the search icon.
Contract Family	Select the contract family from the drop-down menu. The valid values are `Regular` and `Temporary`.
Contract Content	Enter the applicable contract content.
Contract Clauses	
Sequence	Enter the sequence number.
Contract Clause	Enter the contract clause or select a clause by clicking the search icon.
Description	This field is populated based on the contract clause entered or selected.
Clause Status	Select the clause status from the drop-down menu. The valid values are `Optional` and `Required`.
Contract Task Orders	
Task Order #	Enter the task order number.
Begin Date	Enter the begin date or select a date by clicking the calendar icon.
End Date	Enter the end date or select a date by clicking the calendar icon.
Description	Enter the description.
Comments	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Next In List**.	To go to the next person in the list.
Click **Notify**.	To send a notification.
Click **Add**.	To add a new value.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Service Agreements USF

This component identifies any service agreements made with an employee.

To enter a service agreement:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Service Agreements USF*** component. The Find an Existing Value tab - Service Agreements USF page (**Figure 80**) is displayed.

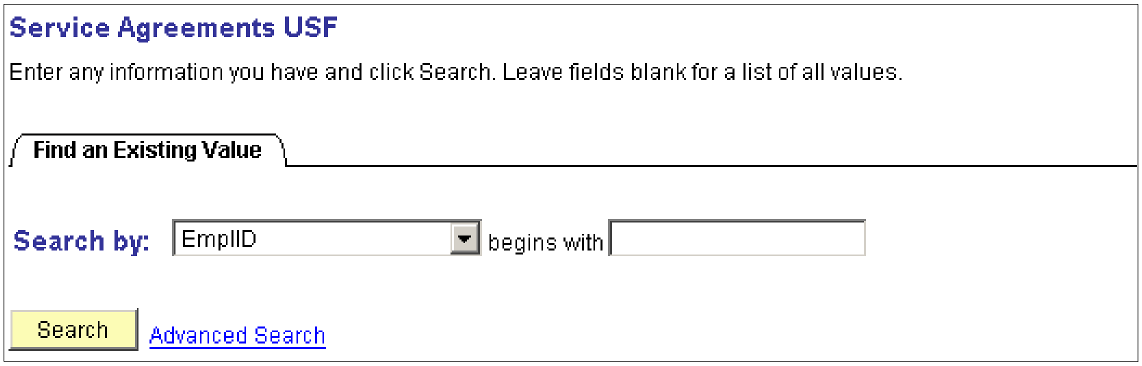


Figure 80. Find an Existing Value tab - Service Agreements USF page

5. Complete the fields as follows:

Search By	Select the applicable value to search by from the drop-down list.
Begins With	Enter the applicable value based on the search criteria selected.

6. Click **Search**. The Service Agreements tab - Service Agreements USF page (**Figure 81**) is displayed.

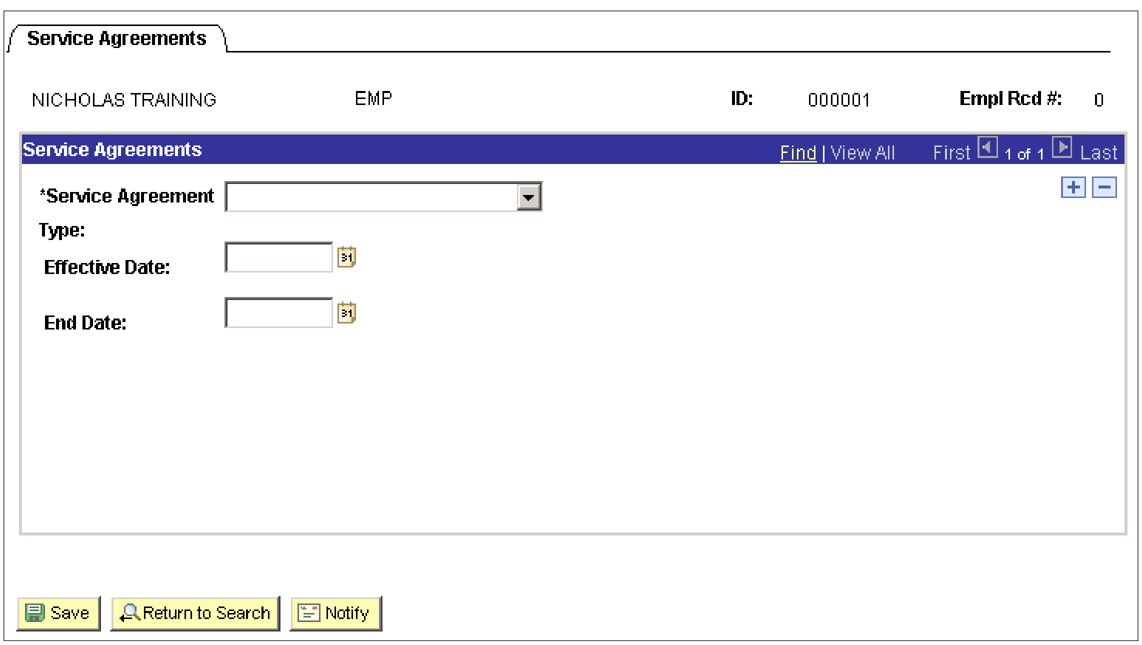


Figure 81. Service Agreements tab - Service Agreements USF page

7. Complete the fields as follows:

Name	This field is populated with the employee's name.
Person	This field displays the person's relationship to the organization.
EmplID	This field is populated with employee ID assigned to the person.
Empl Rcd #	This field is populated with the employee record number.
Service Agreements	
Service Agreement Type	Select the service agreement type from the drop-down menu. The valid values are **`Long Term Training`**, **`Recruitment Bonus`**, and **`Relocation Bonus`**.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
End Date	Enter the end date or select a date by clicking the calendar icon.

8. At this point the following options are available:

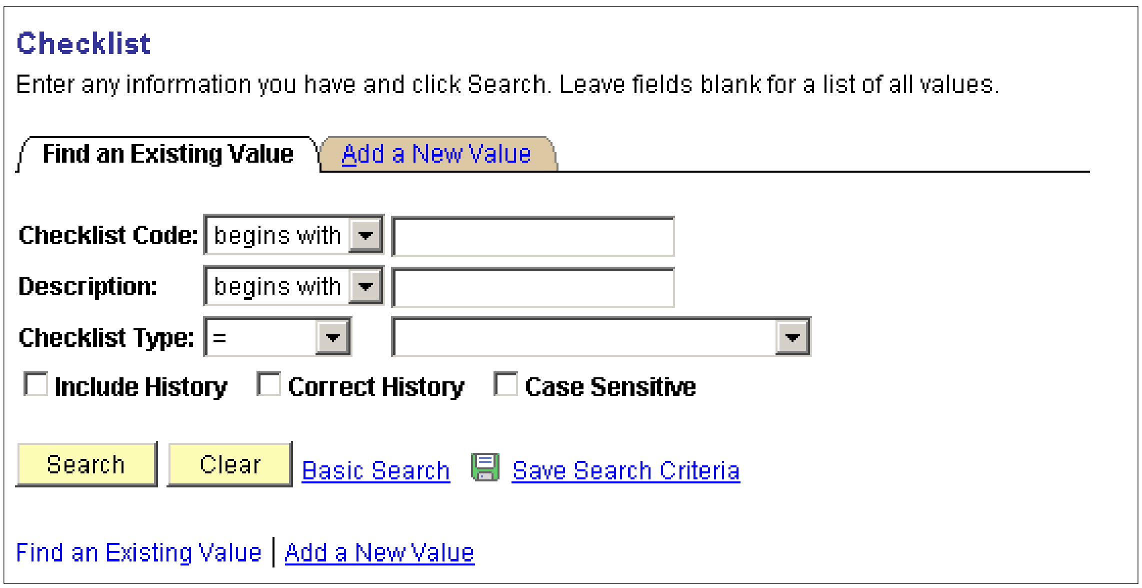
Step	Description
Click **Save**.	To save the new data entered.
Click **Return To Search**.	To search for another person.
Click **Notify**.	To send a notification.

Configure Checklist

Configure checklist allows the user to establish checklists that can be assigned to employees, contingent workers and person(s) of interest.

To configure a checklist:

1. Select the ***Set Up HRMS*** menu group.
2. Select the ***Common Definitions*** menu.
3. Select the ***Checklists*** menu item.
4. Select the ***Checklist*** component. The Find an Existing Value tab - Checklist page (**Figure 82**) is displayed.



Checklist

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

Find an Existing Value | Add a New Value

Checklist Code: begins with
Description: begins with
Checklist Type: =

Include History   Correct History   Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

Find an Existing Value | Add a New Value

Figure 82. Find An Existing Value tab - Checklist page

5. Complete the fields as follows:

Checklist Code	Enter the checklist code.
Description	Enter the description.
Checklist Type	Select the checklist type from the drop-down list.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search**. Select the applicable value. The Checklist Table page (**Figure 84**) is displayed.

   OR

Click **Clear** to clear the entries.

OR

Click the ***Add A New Value*** tab. The Add A New Value tab - Checklist page (**Figure 83**) is displayed.

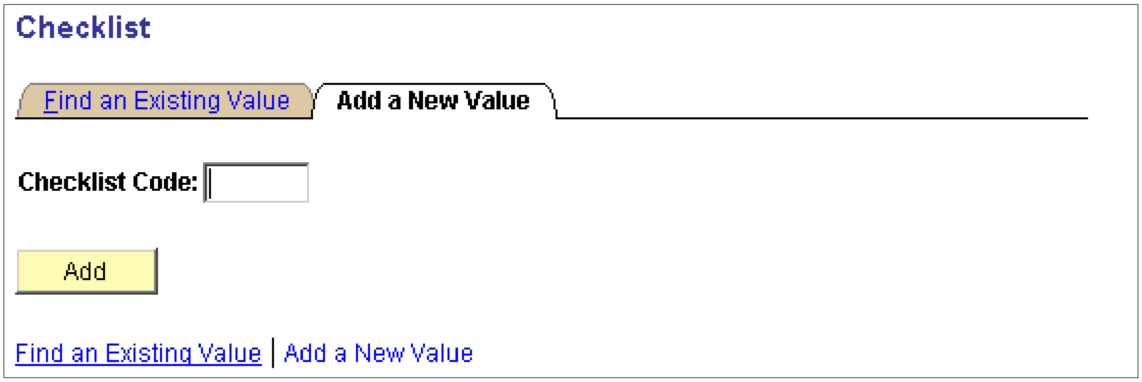


Figure 83. Add A New Value tab - Checklist page

7. Complete the field as follows:

Checklist Code	Enter the checklist code.

8. Click **Add** to add the new checklist code. The Checklist Table page (**Figure 84**) is displayed.

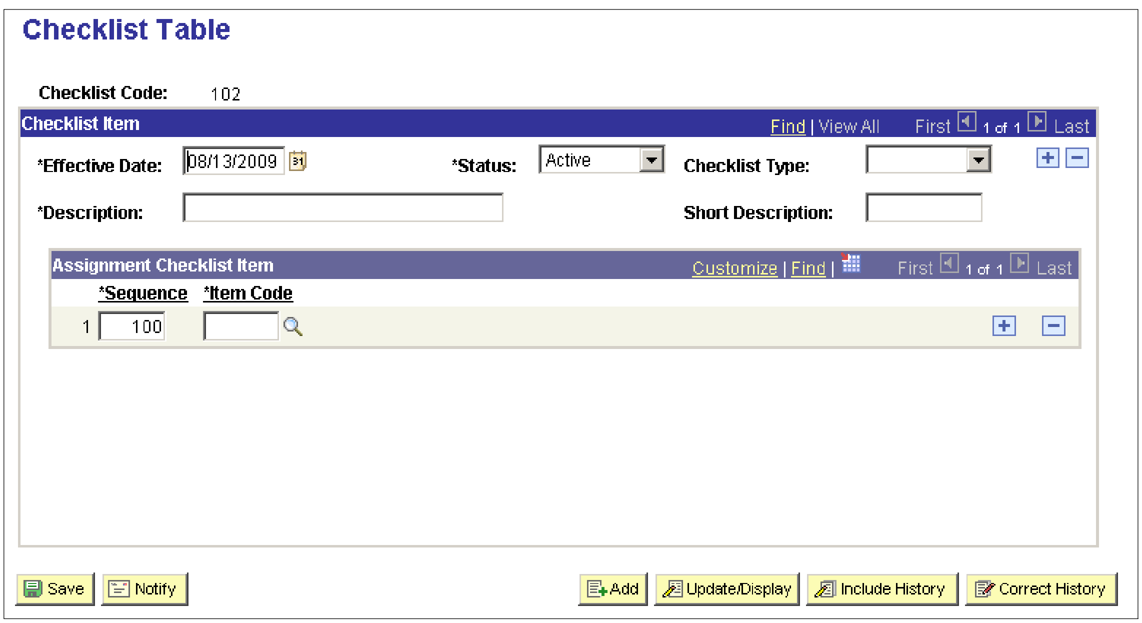


Figure 84. Checklist Table page

9. Complete the fields as follows:

Checklist Code	This field is populated with the checklist code entered or selected in the search criteria.
Checklist Item	

Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are **`Active`** and **`Inactive`**.
Checklist Type	Select the checklist type from the drop-down list.
Description	Enter the description.
Short Description	Enter the short description.
Assignment Checklist Item	
Sequence	This field is system populated. The system automatically sequences the item codes in multiples of 100. When a data row is inserted for a new item, the system automatically assigns the next multiple of 100. To rearrange the order in which the items appear, change the sequence number to the desired numerical order.
Item Code	Enter the item code or select a code by clicking the search icon.

10. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Notify**.	To send a notification.
Click **Add**.	To add a new value.
Click **Update/Display**.	To update the page.
Click **Include History**.	To include history.
Click **Correct History**.	To correct a history record.

Configure Person of Interest Types

This component allows authorized users to establish Person of Interest types that can be associated with person(s) of interest and will be maintained in ***EmpowHR***.

To configure a person of interest type:

1. Select the ***Set Up HRMS*** menu group.
2. Select the ***Foundation Tables*** menu.
3. Select the ***Organization*** menu item.
4. Select the ***Person of Interest Types*** component. The Find an Existing Value tab - Person of Interest Type page (**Figure 85**) is displayed.

Figure 85. Find an Existing Value tab - POI Type page

5. Complete the fields as follows:

Person of Interest Type	Enter the person of interest type.
Description	Enter the description.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered. Select the applicable value. The Person of Interest Type Table tab - POI Type page (**Figure 87**) is displayed.

   OR

   Click **Clear** to clear the entries.

   OR

   Click the ***Add A New Value*** tab. The Add A New Value tab - POI Type page (**Figure 86**) is displayed.

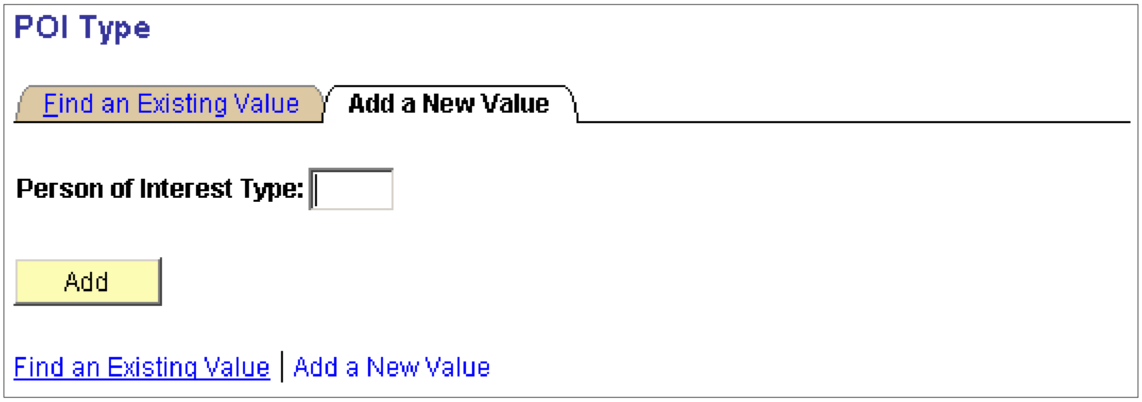


Figure 86. Add A New Value tab - POI Type page

7. Complete the field as follows:

Person of Interest Type	Enter the person of interest type.

8. Click **Add**. The Person of Interest Type Table tab - POI Type page (**Figure 87**) is displayed.

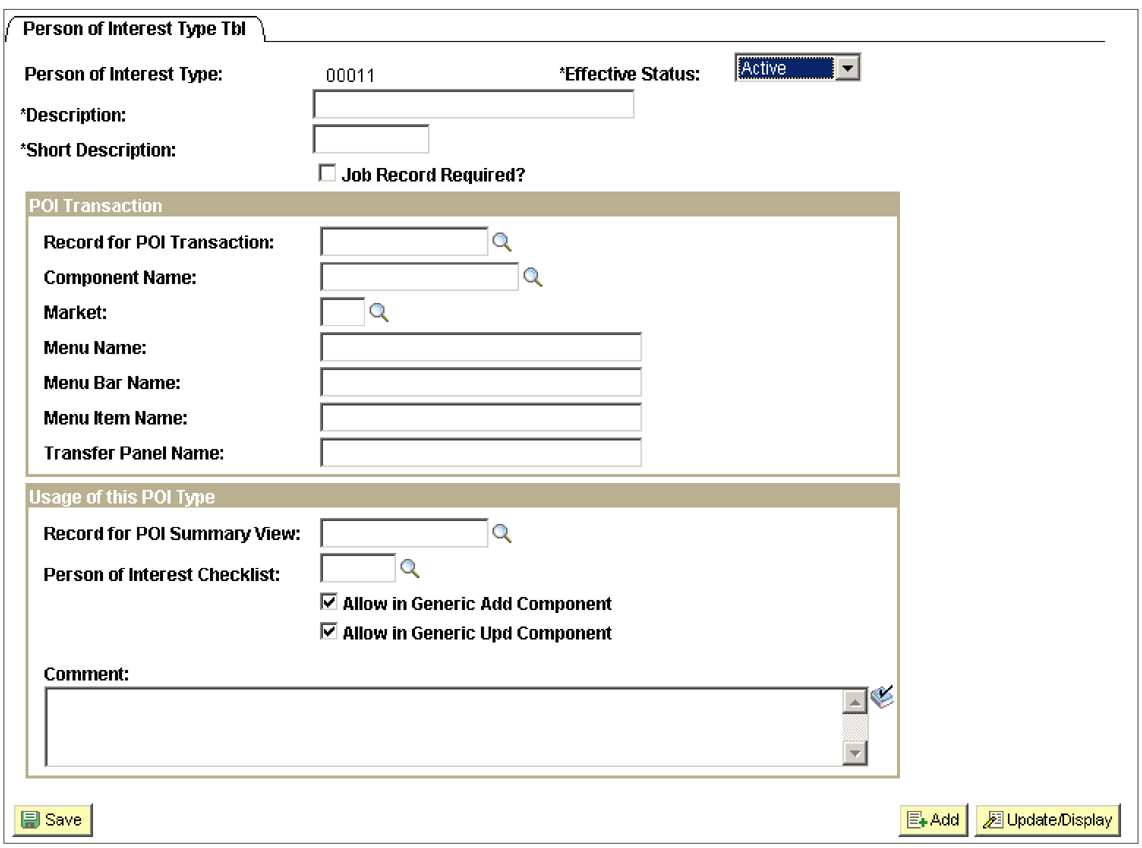


Figure 87. Person of Interest Type Table tab - POI Type page

9. Complete the fields as follows:

Person of Interest Type	This field is populated with the person of interest type entered or selected in the search criteria.
Effective Status	Select the effective status from the drop-down menu. The valid values are **`Active`** and **`Inactive`**.
Description	Enter the description.
Short Description	Enter the short description.
Job Record Required	Check this box if applicable.
POI Transaction	
Record for POI Transaction	Enter the record for POI transaction or select a record by clicking the search icon.
Component Name	Enter the component name or select a name by clicking the search icon.
Market	Enter the market or select a market by clicking the search icon.
Menu Name	Enter the menu name.
Menu Bar Name	Enter the menu bar name.
Menu Item Name	Enter the menu item name.
Transfer Panel Name	Enter the transfer panel name.
Usage of this POI Type	
Record for POI Summary View	Enter the record for POI summary view or select a record by clicking the search icon.
Person of Interest Checklist	Enter the person of interest checklist or select a checklist by clicking the search icon.
Allow in Generic Add Component	Check this box if applicable.
Allow in Generic Upd Component	Check this box if applicable.
Comment	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click **Save**.	To save the new data entered.
Click **Add**.	To add a new value.
Click **Update/Display**.	To update the page.

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

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V