

NC STATE UNIVERSITY

User Guide for Processing Scholarly Reassignment Actions

HRIM-Dept
4/21/2015
9.1 PS Version

This user guide covers the fundamentals processing a scholarly reassignment change and completing the Absence and Vacation panel in PeopleSoft.

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Introduction

Before processing the scholarly reassignment action, please ensure that approvals have been received from the appropriate individuals. For more information regarding the Scholarly Reassignment, please see the [Scholarly Reassignment for Faculty Reg 05.20.24](#).

Job Data Navigation Ref: (HR Systems>Organizational Development> Position Management>Maintain Position/Budgets > Add/Update Position Info)

Absence and Vacation Navigation Ref: (HR Systems>Workforce Administration>Absence and Vacation>Track Absence History>Create/Update Absence)

Scholarly Reassignment Scenarios

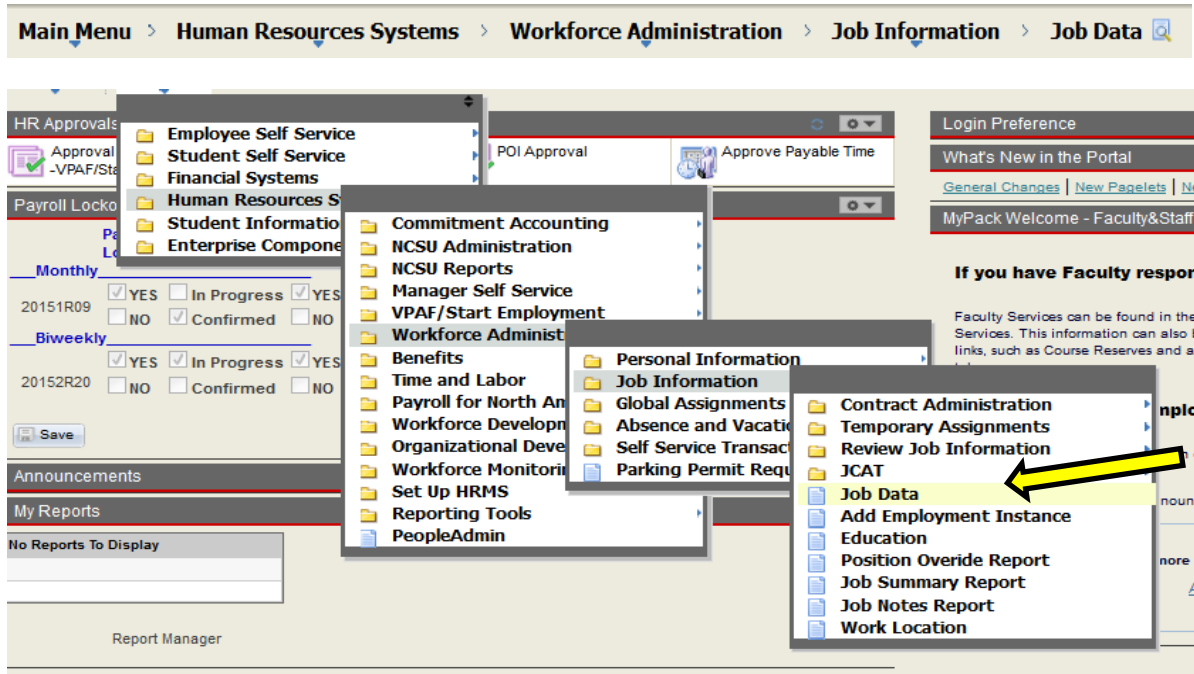
In Scenario One we will process a scholarly reassignment action to place a 9-month tenured faculty member on full pay leave and also return them at the end of the approved time frame. We will demonstrate how to complete the Absence and Vacation screen in PeopleSoft.

In Scenario Two we will process a scholarly reassignment action to place a 12-month tenured faculty member on partial pay leave also return them at the end of the approved time frame. We will demonstrate how to complete the Absence and Vacation screen in PeopleSoft.

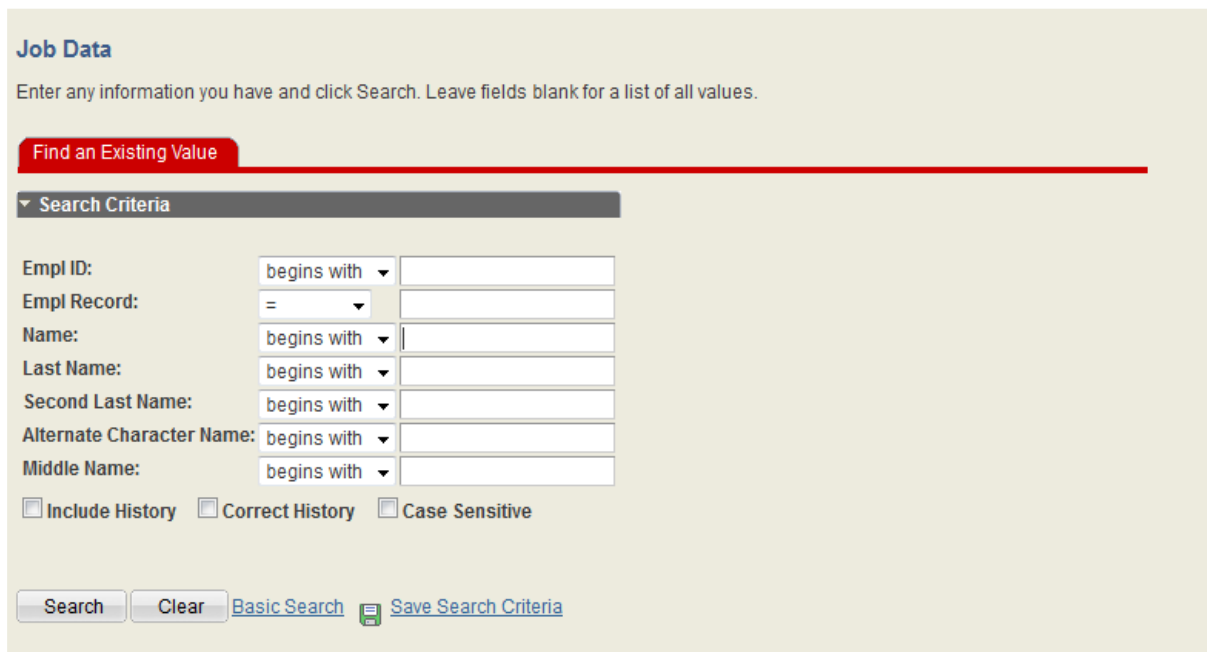
Scenario One (Full Pay)

Job Data

First step in processing the Scholarly Reassignment action is to navigate to Job Data:



Once you click on the Job Data Link, the screen below will appear. Type in the employee's ID number or name and click



To process the action, click on the plus sign in the right hand corner of the Work Location screen to add a row. Update the Effective Date, Action, and Reason. When completed, click Save in the bottom left hand corner of the screen.

Work Location | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Mary Wolfpack Employee Empl ID: 000999999 Empl Record: 0

Work Location Find 1 of 3 **PAF** Go To Row **+** **+**

*Effective Date: 01/01/2015
Effective Sequence: 0
HR Status: Active
Payroll Status: Leave With Pay
*Action: Paid Leave of Absence
*Reason: Sch. Assign with Ful Pay
*Job Indicator: Primary Job

Position Number: 00099999 Professor
Override Position Data

Position Entry Date: 02/14/2000
 Position Management Record

Regulatory Region: USA United States
Company: NCS NC State University
Business Unit: NCSU1 NC State Univ Business Unit
Department: 140401 Electrical & Computer Engr.
Department Entry Date: 02/14/2000
Location: 024 Elec & Comp Engineering
Establishment ID: 001 NC State University Date Created: 04/16/2015

Last Start Date: 02/14/2000
Expected Job End Date: End Job Automatically
Expected Return Date: Override Last Date Worked
Last Date Worked: 12/31/2014

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

Save | [Return to Search](#) | [Notify](#) | [Refresh](#) | [Update/Display](#) | [Include History](#) | [Correct History](#)

Work Location | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [Appointment Info](#) | [Rank/Tenure Info](#)

Absence and Vacation Panel

The next step is to complete the Absence and Vacation panel with the details of the scholarly reassignment. The navigation path to this panel is below.

The screenshot shows a breadcrumb trail at the top: **Main Menu > Human Resources Systems > Workforce Administration > Absence and Vacation > Track Absence History > Create/Update Absence**. Below this, a 'Main Menu' dropdown is open, displaying a tree structure of system categories. The 'Absence and Vacation' folder is expanded, showing sub-items like 'Personal Information', 'Job Information', 'Global Assignments', 'Absence and Vacation', 'Self Service Transactions', and 'Track Absence History'. A yellow arrow points to the 'Create/Update Absence' link at the bottom of the 'Track Absence History' sub-menu.

Once you click on the navigation link, the screen below will appear. Type in the employee's ID number or name and click

The 'Create/Update Absence' page features a search section with the following fields and options:

- Find an Existing Value** (highlighted in red)
- Search Criteria** (dropdown menu)
- Empl ID:** begins with []
- Empl Record:** = []
- Name:** begins with []
- Last Name:** begins with []
- Second Last Name:** begins with []
- Alternate Character Name:** begins with []
- Middle Name:** begins with []
- Case Sensitive
- [Basic Search](#)

Absence Data Tab

Complete the highlighted sections of the Absence Data tab. To select the Absence Type and Absence Code you can click on the magnifying glass next to each text box for help.

The screenshot shows the 'Absence Data' tab for employee Mary Wolfpack. The form contains the following fields and values:

- * Start Date/Time:** 01/01/2015
- * Return Date/Time:** 05/15/2015
- Duration (Days):** [Empty]
- Duration (Hours):** [Empty]
- * Absence Type:** N (Scholarly Assign with Full Pay)
- * Absence Code:** 1 (Approved)
- Reason:** University of Maryland - CPark
- Date Approved:** 07/01/2014
- Notification Date:** 12/01/2014
- * Dept. Contact:** Denise Jimenez

There are also radio buttons for 'Paid or Unpaid Absence' with 'Paid' selected.

Start and End Dates: These dates should correspond with the contract type of the faculty member such as 9 month academic dates should be 1/1 – 5/15 for spring semester and 8/16 – 12/31 for fall semester. For a full year partial pay scholarly assignment the dates can differ.

Absence Type: Select the appropriate code by clicking on the magnifying glass. The drop down choices are below.

Absence Code: Select the appropriate code by clicking on the magnifying glass. The drop down choices are below.

Reason: Type in the specific location of where the faculty member will be during this scholarly reassignment.

Check the Approved box and fill in the date the request was approved by the Dean of your college/division.

Notification Date: This is the date in which you are entering this into this panel. The scholarly reassignments should be entered into PeopleSoft at least 30 days in advance to allow time for processing.

Dept Contact: The name of the person entering this scholarly reassignment into PeopleSoft.

Absence Type drop down choices:

Search Results

Absence Entry Panel	Absence Type	Description
Gen Abs	N	Scholarly Assign with Full Pay
Gen Abs	O	Scholarly Assgn w/ Partial Pay
Gen Abs	TCO	Tenure Clock Extension - Other

Absence Code drop down choices:

Search Results

Absence Code	Description
1	Approved
2	Denied
N	Not Continu. Contributn. Rtrmnt
Y	Continuing Contribution-Rtrmnt

Follow-Up Action Tab

There is nothing on this tab to be completed for the scholarly reassignment.

Comments Tab

On this tab you will need to insert the comment date which is the date you are entering in the comment. In the comment box please provide a brief description with details of the scholarly reassignment. Once this is complete, click Save in the bottom left hand corner of the screen.


The screenshot displays the 'Comments' tab in a PeopleSoft application. At the top, there are three tabs: 'Absence Data', 'Follow-up Action', and 'Comments', with 'Comments' being the active tab. Below the tabs, the user's name 'Mary Wolfpack' and employee type 'EMP' are shown, along with the ID '000999999' and 'Empl Record: 0'. The main content area is divided into two sections: 'Absence Data' and 'Comments'. The 'Absence Data' section includes fields for 'Start Date' (01/01/2015), 'Return Date' (05/15/2015), 'Absence Type' (Scholarly Assign with Full Pay), and 'Absence Code' (Approved). The 'Comments' section has a '*Comment Date:' field with the value '12/01/2015' and a calendar icon. Below it is a '*Comment:' text area containing the text: 'In this space you will type a short summary of what the faculty member will be doing while on the scholarly reassignment.' At the bottom of the form, there are three buttons: 'Save', 'Return to Search', and 'Notify'. Below the buttons, there are links for 'Absence Data | Follow-up Action | Comments'.

At this time the action has been saved and is active in PeopleSoft. Please forward the signed and approved Scholarly Reassignment Request form paperwork to your designated HRIM Specialist.

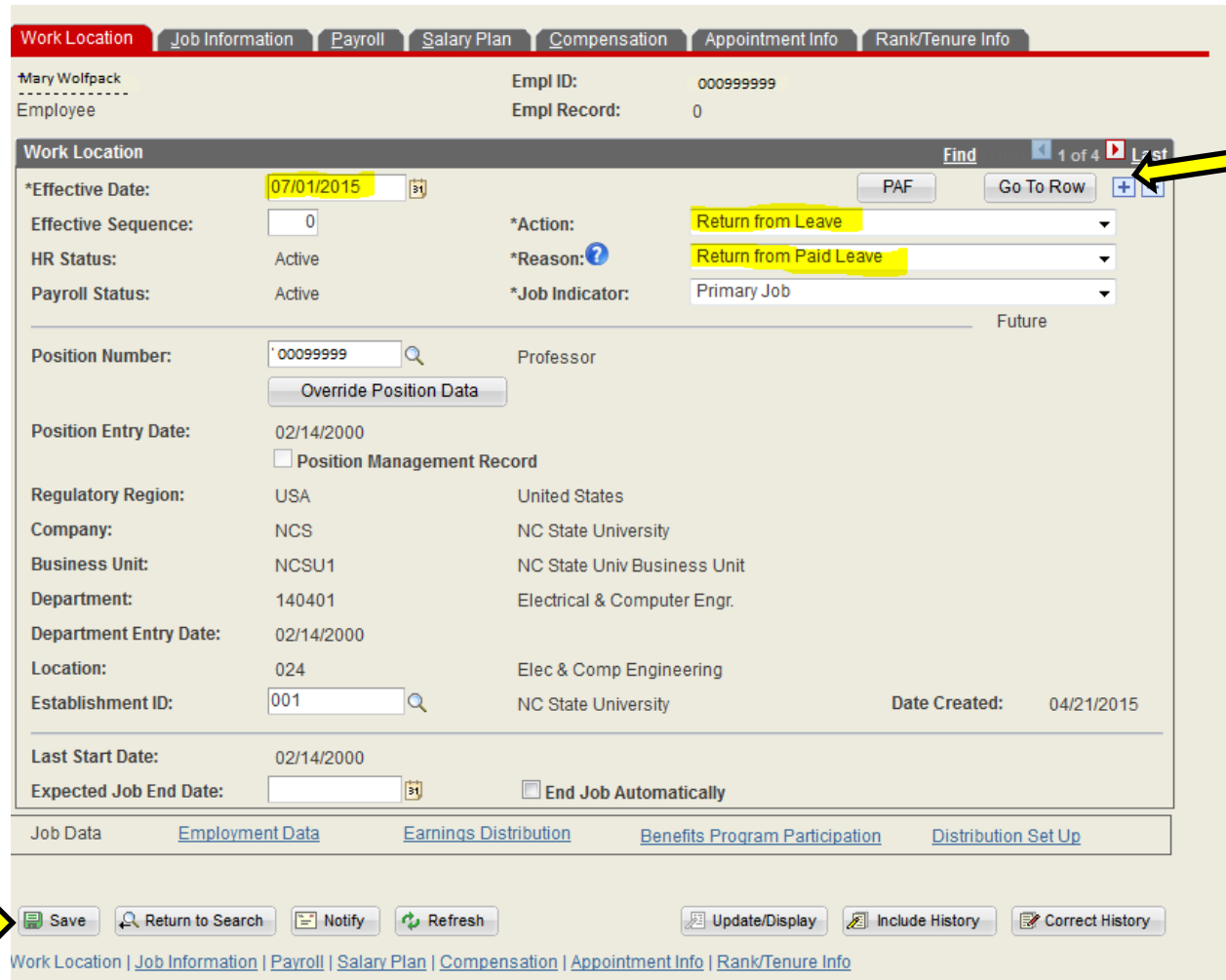
Returning Faculty Member from Scholarly Reassignment

Job Data

First step in processing the Scholarly Reassignment action is to navigate to Job Data:

[Main Menu](#) > [Human Resources Systems](#) > [Workforce Administration](#) > [Job Information](#) > [Job Data](#) 



To process the action, click on the plus sign in the right hand corner of the Work Location screen to add a row. Update the Effective Date, Action, and Reason. When completed, click Save in the bottom left hand corner of the screen.





Work Location | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info


Mary Wolfpack
Employee

Empl ID: 00099999
Empl Record: 0

Work Location Find 1 of 4  


*Effective Date: 07/01/2015  PAF Go To Row 


Effective Sequence: 0 *Action: Return from Leave
HR Status: Active *Reason: Return from Paid Leave
Payroll Status: Active *Job Indicator: Primary Job

Position Number: 00099999  Professor
[Override Position Data](#)








Position Entry Date: 02/14/2000
 Position Management Record

Regulatory Region: USA United States
Company: NCS NC State University
Business Unit: NCSU1 NC State Univ Business Unit
Department: 140401 Electrical & Computer Engr.

Department Entry Date: 02/14/2000
Location: 024 Elec & Comp Engineering
Establishment ID: 001  NC State University Date Created: 04/21/2015

Last Start Date: 02/14/2000
Expected Job End Date:  End Job Automatically

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

 Save  Return to Search  Notify  Refresh  Update/Display  Include History  Correct History

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [Appointment Info](#) | [Rank/Tenure Info](#)

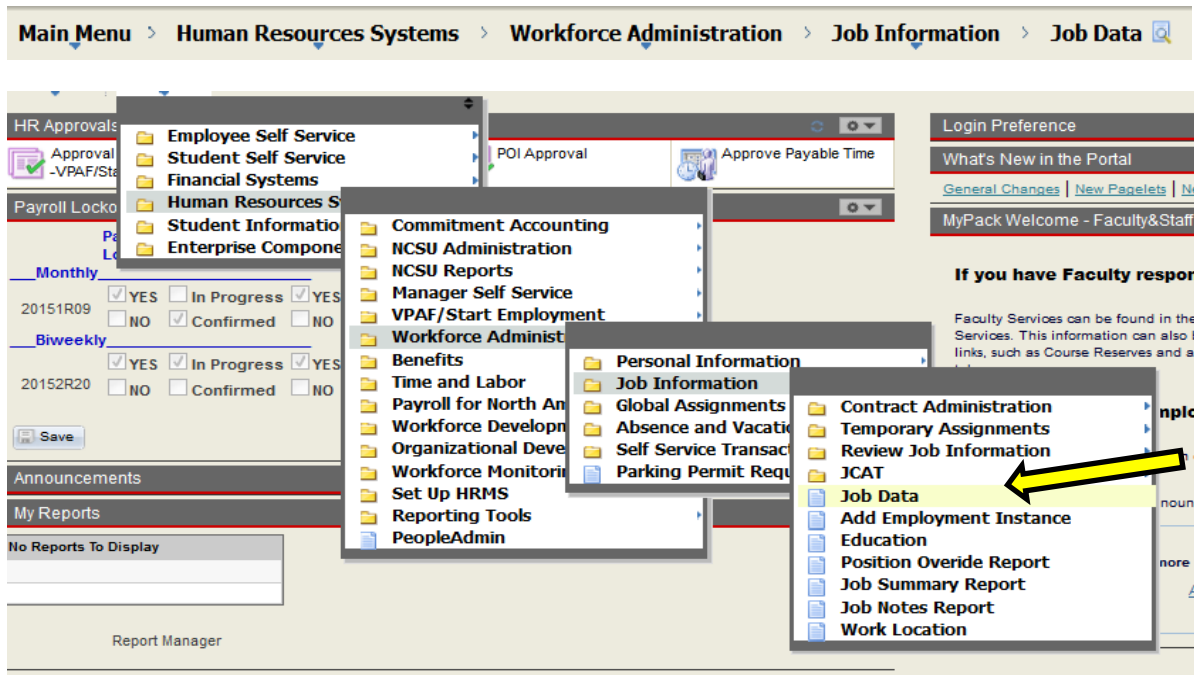
At this time the action has been saved and is active in PeopleSoft.

Scenario Two (Partial Pay)

In this we will process a scholarly reassignment action to place a 12-month tenured faculty member on partial pay leave and also return them at the end of the approved time frame. We will demonstrate how to complete the Absence and Vacation screen in PeopleSoft.

Job Data

First step in processing the Scholarly Reassignment action is to navigate to Job Data:



Once you click on the Job Data Link, the screen below will appear. Type in the employee's ID number or name and click

The screenshot shows the 'Job Data' search screen. It includes a search criteria section with the following fields and options:

- Find an Existing Value (highlighted in red)
- Search Criteria dropdown
- Emp ID: begins with []
- Emp Record: = []
- Name: begins with []
- Last Name: begins with []
- Second Last Name: begins with []
- Alternate Character Name: begins with []
- Middle Name: begins with []
- Include History
- Correct History
- Case Sensitive
- Buttons: Search, Clear, Basic Search, Save Search Criteria

To process the action, click on the plus sign in the right hand corner of the Work Location screen to add a row. Update the Effective Date, Action, and Reason. The FTE will need to be reduced by half on the Job Information tab. The Compensation Rate tab will also need to be updated to reflect the reduced pay.

Work Location | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Richard Wolfpack
Employee

Empl ID: 00099999
Empl Record: 0

Work Location Find 1 of 38

*Effective Date: 01/01/2015 PAF Go To Row

Effective Sequence: 0 *Action: Paid Leave of Absence

HR Status: Active *Reason: Sch. Assign w/ Partial Pay

Payroll Status: Leave With Pay *Job Indicator: Primary Job

Position Number: 00099999 Professor
[Override Position Data](#)

Position Entry Date: 02/14/2000
 Position Management Record

Regulatory Region: USA United States

Company: NCS NC State University

Business Unit: NCSU1 NC State Univ Business Unit

Department: 140401 Electrical & Computer Engr.

Department Entry Date: 02/14/2000

Location: 024 Elec & Comp Engineering

Establishment ID: 001 NC State University Date Created: 04/21/2015

Last Start Date: 02/14/2000

Expected Job End Date: End Job Automatically

Expected Return Date: Override Last Date Worked

Last Date Worked: 12/31/2014

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

Save Return to Search Notify Refresh Update/Display Include History Correct History

Job Information Panel

[Override Position Data](#)

To process the reduction in FTE and standard hours, click on [Override Position Data](#) on the work Location panel, which is located directly under the position number. Once you click this button, the data fields will open up and then you can click on the Job Information tab. In the Standard Hours field, change the standard hours to 20.00 which will update the FTE to .50.

Work Location | **Job Information** | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Richard Wolfpack Employee Empl ID: 000999999
Empl Record: 0

Job Information Find 1 of 3 Last

Effective Date: 01/01/2015 [Go To Row](#)
Effective Sequence: 0 Action: Paid Leave of Absence
HR Status: Active Reason: Sch. Assign w/ Partial Pay
Payroll Status: Leave With Pay Job Indicator: Primary Job Current

*Job Code: F011 Professor
Entry Date: 07/01/2005 JCAT:
Supervisor Level: Supervisor ID: Reports To: 00088888 Head 00088888 Shirley Wolfpack

*Empl Class: EPA Faculty
*Regular Shift: N/A

Standard Hours
Standard Hours: 20.00 Weekly
FTE: 0.500000
 Adds to FTE Actual Count? Encumbrance Override

Contract Number
Contract Type: 001 Limited [Next Contract Number](#)

USA
*FLSA Status: Exempt

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

Compensation Panel

Because this faculty member will be going on a partial pay scholarly reassignment, the annualized salary will need to be reduced by half (50%). To make this change, fill in the annualized salary on the BASE line then click Calculate Compensation so the salary appears in both the Compensation Rate line and BASE. Once completed, click SAVE. At this time, the action has been saved and is active in PeopleSoft.

The screenshot shows the 'Compensation' tab in the PeopleSoft system for employee Richard Wolfpack. The 'Compensation' section displays the following details:

- Effective Date: 01/01/2015
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Leave With Pay
- Action: Paid Leave of Absence
- Reason: Sch. Assign w/ Partial Pay
- Job Indicator: Primary Job

The 'Compensation Rate' is currently set to 123,862.00 USD with an annual frequency. Below this, the 'Pay Components' table is visible:

*Rate Code	Help Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1	BASE	0	123,862.000000	USD	A		

The 'Calculate Compensation' button is highlighted with a yellow arrow.

The screenshot shows the 'Compensation' tab after the update. The 'Compensation Rate' has been changed to 61,931.00 USD. The 'Pay Components' table now shows:

*Rate Code	Help Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1	BASE	0	61,931.000000	USD	A		

Yellow arrows point to the 'Calculate Compensation' button and the 'Save' button at the bottom of the page.

Absence and Vacation Panel

The next step is to complete the Absence and Vacation panel with the details of the scholarly reassignment. The navigation path to this panel is below.

The screenshot shows the navigation path: Main Menu > Human Resources Systems > Workforce Administration > Absence and Vacation > Track Absence History > Create/Update Absence. A yellow arrow points to the 'Create/Update Absence' link in the 'Absence and Vacation' sub-menu.

Once you click on the navigation link, the screen below will appear. Type in the employee's ID number or name and click

Create/Update Absence

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

Find an Existing Value

▼ Search Criteria

Empl ID:	begins with ▼	<input type="text"/>
Empl Record:	= ▼	<input type="text"/>
Name:	begins with ▼	<input type="text"/>
Last Name:	begins with ▼	<input type="text"/>
Second Last Name:	begins with ▼	<input type="text"/>
Alternate Character Name:	begins with ▼	<input type="text"/>
Middle Name:	begins with ▼	<input type="text"/>

Case Sensitive

[Basic Search](#)

Absence Data Tab

Complete the highlighted sections of the Absence Data tab. To select the Absence Type and Absence Code you can click on the magnifying glass next to each text box for help.

Start and End Dates: These dates should correspond with the contract type of the faculty member such as 9 month academic dates should be 1/1 – 5/15 for spring semester and 8/16 – 12/31 for fall semester. For a full year partial pay scholarly assignment the dates can differ.

Absence Type: Select the appropriate code by clicking on the magnifying glass. The drop down choices are below.

Absence Code: Select the appropriate code by clicking on the magnifying glass. The drop down choices are below.

Reason: Type in the specific location of where the faculty member will be during this scholarly reassignment.

Check the Approved box and fill in the date the request was approved by the Dean of your college/division.

Notification Date: This is the date in which you are entering this into this panel. The scholarly reassignments should be entered into PeopleSoft at least 30 days in advance to allow time for processing.

Dept Contact: The name of the person entering this scholarly reassignment into PeopleSoft.

Absence Type drop down choices:

Search Results

Absence Entry Panel	Absence Type	Description
Gen Abs	N	Scholarly Assign with Full Pay
Gen Abs	O	Scholarly Assgn w/ Partial Pay
Gen Abs	TCO	Tenure Clock Extension - Other

Absence Code drop down choices:

Search Results

Absence Code	Description
1	Approved
2	Denied
N	Not Continu. Contributn. Rtrmnt
Y	Continuing Contribution-Rtrmnt

Follow-Up Action Tab

There is nothing on this tab to be completed for the scholarly reassignment.

Comments Tab

On this tab you will need to insert the comment date which is the date you are entering in the comment. In the comment box please provide a brief description with details of the scholarly reassignment. Once this is complete, click Save in the bottom left hand corner of the screen.

The screenshot displays the 'Comments' tab in a web-based system. At the top, there are three tabs: 'Absence Data', 'Follow-up Action', and 'Comments', with 'Comments' being the active tab. Below the tabs, the user's name 'Richard Wolfpack' and employee type 'EMP' are shown. To the right, the 'ID' is '000999999' and the 'Empl Record' is '0'. The main content area is divided into two sections: 'Absence Data' and 'Comments'. The 'Absence Data' section includes fields for 'Start Date' (01/01/2015), 'Return Date' (12/31/2015), 'Absence Type' (Scholarly Assgn w/ Partial Pay), and 'Absence Code' (Continuing Contribution-Rtrmnt). The 'Comments' section has a '*Comment Date' field with the value '12/01/2014' and a '*Comment' text area containing the text: 'In this space you will type a short summary of what the faculty member will be doing while on the scholarly reassignment.' Below the form, there are three buttons: 'Save', 'Return to Search', and 'Notify'. At the bottom, there are navigation links for 'Absence Data', 'Follow-up Action', and 'Comments'.

At this time, the action has been saved and is active in PeopleSoft. Please forward the signed and approved Scholarly Reassignment Request form paperwork to your designated HRIM Specialist.

Returning Faculty Member from Scholarly Reassignment

Job Data

First step in processing the Scholarly Reassignment action is to navigate to Job Data:

[Main Menu](#) > [Human Resources Systems](#) > [Workforce Administration](#) > [Job Information](#) > [Job Data](#)

To process the action, click on the plus sign in the right hand corner of the Work Location screen to add a row. Update the Effective Date, Action, and Reason. Then click on the Use Position Data button to increase the FTE and standard hours to 1.0 FTE, 40.00 hours. Once this button is clicked, all data fields will close and pull in current position information.

Work Location | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Richard Wolfpack
Employee

Empl ID: 00099999
Empl Record: 0

Work Location Find 1 of 4 Pg 1

*Effective Date: 07/01/2015 PAF Go To Row + -

Effective Sequence: 0 *Action: Return from Leave

HR Status: Active *Reason: Return from Paid Leave

Payroll Status: Active *Job Indicator: Primary Job

Position Number: 100099999 Professor
Use Position Data

Position Entry Date: 02/14/2000
 Position Management Record

*Regulatory Region: USA United States

Company: NCS NC State University

*Business Unit: NCSU1 NC State Univ Business Unit

*Department: 140401 Electrical & Computer Engr.

Department Entry Date: 02/14/2000

*Location: 024 Elec & Comp Engineering

Establishment ID: 001 NC State University Date Created: 04/28/2015

Last Start Date: 02/14/2000

Expected Job End Date: End Job Automatically

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

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Job Information Panel

No action is necessary on this panel since the Use Position Data button was clicked. Please verify that the correct information appears in FTE and standard hours. If all information is correct then proceed with the Compensation tab.

Work Location	Job Information	Payroll	Salary Plan	Compensation	Appointment Info	Rank/Tenure Info
Richard Wolfpack Employee	Empl ID: 000999999 Empl Record: 0					
Job Information Find 1 of 4 Last						
Effective Date:	07/01/2015	Action:		Return from Leave	Go To Row	
Effective Sequence:	0	Reason:		Return from Paid Leave		
HR Status:	Active	Job Indicator:		Primary Job	Future	
Payroll Status:	Active					
Job Code:	F011	Professor				
Entry Date:	07/01/2005	JCAT:				
Supervisor Level:						
Supervisor ID:	<input type="text"/>					
Reports To:	00088888	Head	000888888	Shirley Wolfpack		
Empl Class: ?	EPA Faculty					
Regular Shift:	N/A					
Standard Hours						
Standard Hours:	40.00	Weekly				
FTE:	1.000000					
<input checked="" type="checkbox"/> Adds to FTE Actual Count?		<input type="checkbox"/> Encumbrance Override				
Contract Number						
Contract Type:	001	Limited	Next Contract Number			
USA						
FLSA Status:	Exempt					
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation	Distribution Set Up		
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Notify"/>	<input type="button" value="Refresh"/>	<input type="button" value="Update/Display"/>	<input type="button" value="Include History"/>	<input type="button" value="Correct History"/>

Compensation Panel

Because this faculty member was on a partial pay scholarly reassignment, the annualized salary will need to be increased to 1.0 FTE (100%). To make this change, fill in the annualized salary on the BASE line then click Calculate Compensation so the salary appears in both the Compensation Rate line and BASE. Once completed, click SAVE. At this time, the action has been saved and is active in PeopleSoft.

Work Location | Job Information | Payroll | Salary Plan | **Compensation** | Appointment Info | Rank/Tenure Info

Richard Wolfpack
Employee

Empl ID: 000999999
Empl Record: 0

Compensation

Effective Date: 01/01/2015
Effective Sequence: 0
HR Status: Active
Payroll Status: Leave With Pay

Action: Paid Leave of Absence
Reason: Sch. Assign w/ Partial Pay
Job Indicator: Primary Job

Current

Compensation Rate: 123,862.00 USD *Frequency: Annual

Comparative Information

Pay Rates

Default Pay Components

Pay Components

*Rate Code	Help Rate Code	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 BASE	?	123,862.000000	USD	A		

Calculate Compensation

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

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

*Edited by EM