

UNIVERSITY *of* PENNSYLVANIA

Payroll/Personnel Database

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Introduction

This section will explain how to maneuver through the various Inquiry screens in the Payroll/Personnel System. You are encouraged to try to enter and explore all of the various screens to see how the information will enhance your work knowledge. Since each of the screens is in Inquiry mode, you will not be able to change any information you will be viewing. You will be electronically denied access to any screens to which you have not been granted access. When you read the message on the screen stating you do not have access, simply hit the ENTER key to return to the previous menu. You will only be able to view records of those employees within your home department or school.

Logging On To Mainframe System

You need to access Payroll through the UMIS system. Contact your local LSP to have this access put onto your own desktop. The system is not case sensitive though many people choose to keep their caps lock on, since all information in the system appears in capitol letters.

At the "Application" prompt

- Type **CICSZUPN**
- Press **[Enter]**
- Clear the CICS banner screen **[Pause/Break]**
- Type **CSSN**
- Press **[Enter]**

At the system prompt LOGONID and PASSWORD

- Type your **logon ID**
- Press **[Tab]**
- Type your **password**
- Press **[Enter]**

The system displays information about the session including a '**signon completed**' message and the logon ID and name of the user.

- Clear the screen **[Pause/Break]**
- Type **UMIS**
- Press **[Enter]**

The system displays the UMIS Main Menu with **PAYROLL & SALMGMT** among the options.

- Type **PAYROLL** to access Payroll/Reallocation main menu
- Press **[Enter]**

or

- Type **SALMGMT** to access the Salary Management main menu
- Press **[Enter]**
- The Payroll Banner Screen is displayed
- Press **[Enter]** to access the Function Menu

Logging On To Mainframe System (continued)

There is a shortcut to this process. The following can limit the number of steps:

At the "Application" prompt

- Type **CICSZUPN** Press **[Enter]**
- Clear the CICS banner screen **[Pause/Break]**
- Type (**as one word**) CSSN your **logon ID**/your **password** (i.e.: CSSNP7xxxxx/password)
- Press **[Enter]**

Notice that anyone watching you do this can see your logon ID and password.

The system displays information about the session including a '**signon completed**' message and the logon ID and name of the user.

- Clear the screen and type (as one word) **UMISPAYROLL**
- Payroll Banner Screen is displayed
- Press **[Enter]** to access the Function Menu

Logging Off the Mainframe System

At the Human Resources Management System Function Menu

- **[Tab]** to the INTERRUPT field
- Type **SO** (for Sign Off)
- Press **[Enter]**

Human Resources Management System Sign Off screen is displayed.

- Type **Stop** to exit the system
- Press **[Enter]**
- The UMIS main menu is displayed
- Press **[PF12]** to Sign Off

☞ There is no short cut to logging off. Closing the window using the "X" in the upper right corner does not necessarily stop the connection to the UMIS mainframe, and you could be being charged for access time by logging off incorrectly.

Function Menu

From the Function Menu select **02 Inquiry** to enter Inquiry mode in the database.

```
ISSGONP                UNIVERSITY OF PENNSYLVANIA                DATE: 01/27/06
                        HUMAN RESOURCES MANAGEMENT SYSTEM          TIME: 10:15:16
                        FUNCTION MENU

                        **PERSONNEL RECORDS**
                        01 DATA ENTRY AND UPDATE
                        02 INQUIRY
                        03 SPECIAL FUNCTIONS
                        04 SALINC
                        **TIME REPORTING**
                        05 TIME REPORTING DATA ENTRY
                        06 REALLOCATIONS
                        **PAYROLL**
                        07 TIME CORRECTIONS
                        08 ADJUSTMENT CORRECTIONS
                        **CONTROL TABLE**
                        09 CONTROL TABLE DATA ENTRY
                        **POSITION INVENTORY**
                        10 POSITION INVENTORY MAINTENANCE
PLEASE ENTER THE NUMBER OF THE FUNCTION YOU WISH TO PERFORM:
INTERRUPT?:

PF6=FHELP  PF9/21=HELP
```

From the Personnel Records Inquiry Menu select **01 Personnel Menu**.

```
IS04MNP                UNIVERSITY OF PENNSYLVANIA                DATE: 01/27/06
PERSONNEL              ***PERSONNEL RECORDS INQUIRY MENU***          TIME: 10:16:41

                        00 PERSONNEL RECORDS MENU
                        01 PERSONNEL MENU
                        02 BENEFITS MENU
                        03 PAYROLL MENU

PLEASE ENTER THE NUMBER OF THE
FUNCTION YOU WISH TO PERFORM:

INTERRUPT:

PF6=FHELP  PF9/21=HELP
```

Personnel Records Inquiry Menu

The next screen is also entitled **Personnel Records Inquiry Menu** and is shown below.

```
IS04SAP          UNIVERSITY OF PENNSYLVANIA          DATE: 01/27/06
PERSONNEL        ***PERSONNEL RECORDS INQUIRY MENU***  TIME: 10:18:35

                TRANS -----DESCRIPTION-----

                000 PERSONNEL RECORDS MENU
                003 PERSONNEL ACTION DATA
                004 JOB ASSIGNMENT
                005 PERSONAL DATA
                010 FACULTY LEAVE TRACKING
                015 RECENT JOB HISTORY
                025 TIME BALANCES
                026 GROSS DOLLAR BALANCES
                030 NAME SEARCH

TRANS:           EMPL:                               JOB:   ORG ID:
INTERRUPT:

PF6=FHELP       PF9/21=HELP
```

The screen title is centered at the top of the page, and the current date and military time are in the upper right corner.

The bottom of the screen contains the following fields:

TRANS - (Transaction Code) – This field is used to enter the number that corresponds to a personnel action. This field is a 3-character numeric field. Values can be entered as one or two or three characters. For example: TRANS: 3, TRANS: 03, or TRANS: 003. Each entry will provide the same result.

EMPL - (Employee Social Security Number) – This field is used to enter the employee SSN or name. This field is an alpha-numeric field. Values are entered as 9 numeric characters with no separators, for example: 999999999, or as alphabetic characters invoking the name search function in the order: last name, first name (No spaces between comma and first name). i.e. Jordan,Michael or Jordan,M or Jordan. Each entry will provide a name search allowing you to advance the cursor to the name you need.

JOB - (Job Number) – An employee of the University of Pennsylvania can have up to four jobs. This field is used to enter the job number that corresponds to the job to be displayed. This field is used when entering the job assignment screen. This is a 1-character numeric field.

ORG ID - (Organization ID) – This field should always remain blank.

Personnel Action Data Screen (003)

To display a personnel record for an employee, enter 003 (Personnel Data) in the TRANS field, tab to EMPL, type the SSN or name of the employee and press ENTER.

The **Personnel Action Data Screen** enables the user to inquire against employee basic data (i.e. employment date, status date, etc.).

```
IS0403P          UNIVERSITY OF PENNSYLVANIA          DATE: 01/27/06
PERSONNEL        ***PERSONNEL ACTION DATA***        TIME: 10:20:38
100250660  CAMPBELL,LAUREEN
NAME SUFFIX:          NAME PREFIX:

--STATUS INFORMATION--
EMPLMT STATUS: A      STATUS DATE: 01/05/98      EMPLMT DATE: 01/05/98
SEPARATN RESN:      LOA RETURN DATE: /          LOA RESN:
REG OR TEMP: R      FULL/PART TIME: F          EMPL TYPE(E/N): N
PAY STATUS: S      NEXT REVIEW: 05/05/98      BARG UNIT IND:
SENIORITY DATE: / / ANN(BENE)BASE RATE: 23999      ORIGIN HIRE DATE: 01/05/98
ORG NUMBER: 4119    SPECIAL STAT TENURE:          SPEC STATUS DATE: 00/00
PROV S/M DATE: / /  TENURE PROB DATE: 00/00      ACADEMIC BASE: 0
SUPERVISOR ? : N    SUPV TRAIN DATE: /

REGION ID:          DIVISION ID:          COMPANY ID:
CORPORATION:

--INFORMATIONAL DATA--
LAST ACTIONS: 11    LAST ACTN DATE: 12/23/99      MINIMUM RCRD: OK
CROSS-REF ID:      LAST PAY PROCESS: 08/09/98    PRIOR DATE: 08/02/98

TRANS: 003  ID: 100250660          JOB:  ORG ID:
PF6=FHELP          PF9/21=HELP
```

Following is a list of all the fields displayed on the Personnel Action Screen, a description of the field and all possible values.

NAME SUFFIX – Accepts from zero to four characters. Examples of valid codes for this field include Jr., Sr., Esq., PhD. Each punctuation mark counts as one character. To enter a valid name suffix, type the suffix of choice. If no suffix is required, leave the field blank.

NAME PREFIX – Accepts from zero to four characters. Examples of valid codes for this field include Miss, Ms., Mrs., Mr., Dr., Fr. To enter a valid name prefix, type the prefix of choice. If no prefix is required, leave this field blank.

EMPLMT STATUS (Employment Status) – Identifies the relationship between the employee and the University of Pennsylvania. This is a 1-character alpha field. Valid codes for this field are:

- A - Active
- L - Leave of Absence Without Pay
- P - Leave of Absence With Pay
- T - Separated or Terminated

STATUS DATE – Shows the date on which the employment status became effective. This date should only be changed when the employment status changes. Use the MM/DD/YY format.

For example:

- Michael Jordan became an active employee on September 13, 1996; therefore, the Status Date will be 09/13/96.
- Michael Jordan goes out on a leave of absence without pay on June 1, 1997; therefore, the Status Date will be 06/01/97.

EMPLMNT DATE (Employment Date) – The most recent date of hire. Use the MM/DD/YY format.

For example: Michael Jordan became an active employee on September 13, 1996, therefore, the Emplmnt Date will be 09/13/96.

SEPARATN RESN (Separation Reason) – Used only when the relationship between the employee and the University of Pennsylvania is terminated. This is a 2-character numeric field. Valid codes for this field are:

STAFF REDUCTION

- 01 – Position discontinued
- 03 – Lack of funding
- 04 – Completion of contract
- 06 – End of appointment

TERMINATION FOR CAUSE

- 20 – Not qualified
- 21 – Excessive unexcused absence or tardiness
- 22 – Unsatisfactory performance
- 23 – Misconduct or violation of rules
- 24 – Other

RETIREMENT

- 30 – Normal retirement
- 31 – Early retirement

RESIGNATION

- 40 – Accepted new job (academic)
- 41 – Accepted new job (non-academic)
- 42 – Marriage or domestic obligations
- 43 – Dissatisfied with pay
- 44 – Personal reasons
- 45 – Quit without notice
- 46 – Relocation
- 47 – Returned to school
- 48 – Dissatisfied with working conditions
- 49 – Student, job ended

OTHER TYPES OF SEPARATION

- 60 – Medical necessity
- 80 – Death

LOA RETURN DATE (Leave of Absence Return Date) – Date of return from leave of absence. This is a 5-character numeric field. The format is MM/YY. For example: Michael Jordan will return from leave on July 1, 1998; therefore, LOA Return Date will be 07/98.

LOA RESN (Leave of Absence Reason) – Reason for leave of absence. This is a 2-character numeric field. Valid codes for this field are:

- | | |
|--|---------------------------|
| 01 – Disability (Worker’s Compensation only) | 05 – Illness |
| 02 – Military Duty | 06 – Family obligations |
| 03 – Parental | 07 – Scholarly leave |
| 04 – Personal | 08 – Employment elsewhere |

REG OR TEMP (Regular or Temporary) – Employees of the University of Pennsylvania are hired as regular or temporary employees. Regular employees include full-time, part-time and limited service. Temporary employees include temporary, occasional and student workers. (These workers work less than six months or less than 1,000 hours or less in a fiscal year.) Valid codes for this field are:

- R - Regular
- T - Temporary

FULL/PART TIME (SALARY KEY) The salary status of the employee. This is a 1-character alpha field. Valid codes for this field are:

- F - Full-time regular employment
- P - Part-time regular employment
- U - Unsalaries
- S - Special benefits for people not generally eligible for benefits, for example, Post-Doctoral Fellows. Any others must be approved by the Provost’s Office.
- L - Long term disability. Assigned only by Human Resources/Benefits.
- T - Temporary. Including all employees with “Temp” in their title and all students except Post-Doctoral Fellows.
- R - Retired. **When this code is assigned, it should never be changed,** even if the employee returns to work on a part-time, temporary, or occasional basis. Retired employees must meet age and service requirements retiree benefits.
- W - Assigned by the Workers Compensation Office only. This field indicates that the employee is receiving workers compensation.

EMPL TYPE (E/N) (Employee Type) – Under federal law, employees are either exempt or non-exempt from the Fair Labor Standards Act wage and hour regulations. Monthly-paid staff are exempt, and weekly-paid staff are non-exempt. Non-exempt employees are paid overtime for all hours worked over 40 in any given week. This field is automatically updated once the job class code has been entered. This field is a one-character alpha field. Valid codes for this field are:

- E - Exempt (Monthly)
- N - Non-exempt (Weekly)

PAY STATUS – Employees of the University of Pennsylvania are paid on an hourly or salaried basis. Exempt salaried employees are paid on a weekly basis. Hourly employees require time input using a Time Report Form (TRF). This a 1- character alpha field. Valid codes for this field are:

- H - Hourly
- S – Salaried

NEXT REVIEW DATE – Date of the employee's next performance review. This is an 8 – character field. The format is MM/DD/YY. For example, Michael Jordan's next performance evaluation is June 15, 1989; therefore the Next Review Date will be 06/15/89.

BARG UNIT END (Bargaining Unit Indicator) – Indicates whether the employee's position is represented by a bargaining union (union). This is a 1-character alpha field. Valid codes for this field are:

- U – Union
- Blank – Non-union

SENIORITY DATE – The employee's seniority date in the bargaining unit. This is an 8-character numeric field. Use the MM/DD/YY format. For example, Michael Jordan's seniority date in the union is June 19, 1965; therefore the Seniority Date is 06/10/65. **Leave blank for non-union positions.**

ANN BEN BASE RATE (Annual Benefits Base Rate) – Used to calculate benefits for eligible employees. Leave this field blank. This field is updated each year after the annual salary increase process (SALINC) and throughout the year by HRIM/Records.

ORIGINAL HIRE DATE – The employee's original date of hire with the University of Pennsylvania. This is an 8-character numeric field. The format for this field is MM/DD/YY. This date can be the same as or different from the Employment Date. For example 1) Michael Jordan was employed as a Secretary III on January 1, 1989; therefore, the Original Hire Date will be 01/01/89 and the employment date is 01/01/89; 2) Michael Jordan became a student worker on February 1, 1988. On January 1 of the following year, he became a full-time Business Administrator; therefore, Michael Jordan's Original Hire Date will be 02/01/88 and the Employment Date will be 01/01/89. Once the Original Hire Date has been entered it cannot be changed except by HRIM/Records.

ORG NUMBER (Organization Number) – Employee's home department. The department that owns the employee's record and is responsible for its maintenance. This is a 4-character numeric field.

SPECIAL STAT TENURE (Tenure Code) – A faculty member's tenure status. This is a 1-character numeric field. Only the Provost's and Medical School Dean's offices can enter this information. Valid codes for this field are:

- 1 - Tenure has been granted.
- 2 - Restricted tenure has been granted. Tenure is limited to a specific title or to the duration of specific funding.
- 3 - Under consideration for tenure. The individual is in the final stage of the tenure track, during which the final decision to grant or deny tenure is made.
- 4 - Tenure has been considered and denied.
- 5 - In tenure probationary status. Accruing tenure status.
- 6 - Probationary status in either the research faculty or the Clinician-Educator track. Subject to mandatory review.
- 7 - Not in tenure probationary status.
- 8 - Senior Clinician-Educator track faculty member no longer subject to mandatory review.
- 9 - Senior research faculty member no longer subject to mandatory review.

SPEC STATUS DATE (Tenure Status Date) – Date on which a faculty member's special status is expected or was attained. This is a 5-character numeric field. The format is MM/YY. For example, Professor J. Doe is expected to attain special status on June 1, 1989; therefore, the Spec Status Date will be 06/89.

PROV S/M DATE (Provost Staff Minutes Date) – Date on which the Provost Staff Conference Group met to discuss faculty appointments.

TENURE PROB DATE (Tenure Probation Date) – Date on which the tenure track began. This is a 5-character numeric field. The format is MM/YY. For example, Professor Jones will begin the tenure track on August 15, 2001; therefore, the Tenure Prob Date will be 08/01.

ACADEMIC BASE – Faculty salary associated with granting tenure. Whole dollar amounts are entered. For example, if Prof. Jones academic base is \$30,000, the Academic Base will be 30000.

This field must be entered for all Faculty hires.

SUPERVISOR? – Identifies full-time staff as supervisor. Marks employee for Penn Supervisor Training. Should not be used for student workers, grad students, or post-doctoral researchers. This is a 1-character alphabetic field.

Y - Yes

N - No

SUPV TRAIN DATE – Date staff member attended Penn Supervisor Training. This field is updated by the Learning and Education Department/Human Resources.

LAST ACTIONS – Identifies the last update made to the employee record. When entered this is a 3-character numeric field; it is displayed as a 2-character field (the leading zero is dropped).

Once a personnel action is completed, this field will automatically be updated; no input is necessary in this field. For example, if you have just completed a Home ORG Transfer, 10 would appear in this field. The following is a list of the personnel transaction codes:

PERSONNEL DATA ACTIONS

001 – Initial Employment

002 – LOA with Pay

003 – LOA without Pay

004 – Return from LOA

005 – Separation/Termination

010 – Home ORG Transfer

011 – Other Personnel Update

021 – Rehire

JOB DATA ACTIONS

007 – Job Reclassification

008 – Promotion/Demotion

009 – Job Assignment Update

013 – Reappointment

016 – Salary Incr/Decr

017 – Job Assignment Add

018 – job Assignment Delete

019 – Distribution Update

023 – Job ORG Transfer

PERSONAL DATA ACTIONS

020 – Personal Data Update

MISCELLANEOUS

030 – Name Search

LAST ACTN DATE – The date that corresponds to the last action. This is an 8-character numeric field. The format is MM/DD/YY. Once a personnel action has been completed, no input is allowed in this field; the date of the action will automatically appear.

MINIMUM RCRD (Minimum Record) – Indicates that the minimum amount of data for an employee record has been supplied. This is a 2-character alpha field. Only the Payroll and Tax offices can update this field. Valid codes for this field are:

NO - Indicates that insufficient data has been supplied by the user.

TX - Minimum data have been supplied by the user. All necessary forms must be submitted to the Human Resources Information Management/Records office.

OK - Minimum record is satisfied, all necessary forms were submitted and approved, and the employee can be paid.

CROSS-REF ID (Cross Reference Identification Number) – If an employee has been entered in to the system with a temporary or incorrect identification (Social Security number), when HRIM/Records enters the correct number, the previous number will be displayed in this field. Until this happens, all transactions and time report forms must use the temporary or incorrect number.

LAST PAY PROCESS – The data of the most recent check or advice will be shown here. In some instances even if there is no recent check or advice, a recent date will appear to indicate that benefits activity has taken place during a recent payroll process. The format is MM/DD/YY.

PRIOR DATE – The date preceding the Last Pay Process, when a paycheck was processed. The format is MM/DD/YY. This field, in combination with the Last Pay Process field, will help to determine if the employee is receiving pay on a regular basis, or if a pay has been missed.

Job Assignment Data (004)

The **Job Assignment Data** screen enables the user to inquire against basic data (i.e. job class code, job dept, etc.).

```

IS0404P          UNIVERSITY OF PENNSYLVANIA          DATE: 01/27/06
PERSONNEL        ***JOB ASSIGNMENT DATA***          TIME: 12:12:37
100250660  CAMPBELL, LAUREEN                        JOB(S): 1

      JOB #: 1          BEGIN DATE: 01/05/98          END DATE: 06/30/03
      POSITION #: 8141   JOB CLASS: 525375 - OFFC ADMNST ASST A
PAY PER.AMT/RATE: 475.200    RATE CODE: P          CLASS ENTRY DATE: 01/05/98
% FULL-TIME: 100.00        TERM: 0          PAY CYCLE: W1
      JOB ORG: 4119    TIME RPT CODE: E          COMPA-RATIO: 9.999
PH-PHARMACOLOGY ADMINISTRA  HOURLY RATE: 12.672          HOURS: 37.50
      EMP TYPE: 2     ANNUAL SALARY: 24710.000    TRF SORT CD:
CNAC ORG B/C FUND OBJ PGM CREF ERN PER.AMT PERCENT START STOP
1  950 9562 1 000000 5111 6310 0000 REG 475.200  0.00  07/01/02 06/30/03
2                                     0.000  0.00  / / / /
3                                     0.000  0.00  / / / /
4                                     0.000  0.00  / / / /
5                                     0.000  0.00  / / / /
6                                     0.000  0.00  / / / /
7                                     0.000  0.00  / / / /
8                                     0.000  0.00  / / / /

TRANS: 004  ID: 100250660          JOB: 1  ORG ID:
PF6=FHELP          PF9/21=HELP
  
```

Below is a list of all fields in the Job Assignment Data Screen, a description of the field and all possible field values.

JOB(S) – This field displays the number of jobs an employee has. An employee may have up to four different jobs. This field is automatically updated by the system. For example, 1) Jane Doe has two jobs and both jobs are complete, therefore the Job(s) field will be 1,2.

JOB # (Job Number) – The number of the job for which you are currently performing an inquiry.

BEGIN DATE – The date on which the employee will begin work in this job. The format is MM/DD/YY. For example, John Smith is going to begin work in this job on August 15, 1978, the Begin Date will be 08/15/78.

END DATE – The date on which this employee's job will end. The end date must not precede the begin date. The format is MM/DD/YY.

POSITION # - This field is required for all University administrative staff only. This field is a 4-character numeric field, and is unique for each job/employee.

JOB CLASS (Job Class Code) – The 6-character numeric job classification code for classification or title of the employee’s job. The system displays the corresponding title when the record is updated. Once you have entered the job class code, the system will automatically update the employee type, pay cycle, rate code, hourly rate, and time reporting code.

PAY PER.AMT/RATE (Pay Period Amount/Rate) – The employee’s hourly pay rate (type 5 or 3), gross weekly salary (type 2), or gross monthly salary (type 1, 4, 8 or 9). Whole dollar amounts can be entered with or without decimal points and trailing zeros. Hourly rates must be entered to the third decimal place. For example, 6.125.

RATE CODE – Indicates whether the employee is paid hourly or by per pay period amount. This is a 1-character alpha field. The field is automatically updated once the job class code has been entered.

Valid codes for this field are:

- H - Hourly (Type 3 or 5 employees)
- P - Pay Period (Type 1,2,4,8, or 9 employees)

CLASS ENTRY DATE – Whenever a Job Class code is entered or changed, this field should show the date on which the employee began the new job. The format is MM/DD/YY. For example, Jane Doe’s job title changed on September1, 1989; therefore, the Class Entry Date would be 09/01/89.

% FULL TIME – The percent of full-time worked by the employee. Estimate as closely as possible. For example, Jane Smith’s standard work hours are 40 and she works 20 hours a week, therefore, % Full Time would be 50%, enter 50.

TERM – The employee’s work and pay schedule. This is a 1-character numeric field. Valid codes for this field are:

- 0 - 12-month employee paid over 12 months (default)
- 1 - 9-month employee paid over 9 months
- 2 - 9-month employee paid over 12 months
- 3 - 10-month employee paid over 10 months
- 4 - 3-month summer salary for faculty

PAY CYCLE – The pay cycle for the job. The University of Pennsylvania has two payroll cycles, monthly (M1) and weekly (W1). This is a 2-character alpha-numeric field. This field is automatically updated once the job class code has been entered. Valid codes for this field are:

M1 - Monthly Paid (Type 1,4,8, or 9 employees)

W1 - Weekly Paid (Type 2,3, or 5 employees)

JOB ORG (Job Organization Number) – The department number in which the employee works. The job department may be different from the home department number. This is a 4-character numeric field. Department name appears below the number. In this example, Michael Jordan's job is in the Management Department (4119) and his home department is Management (4119).

TIME RPT CODE (Time Report Code) – The method of time reporting required for the job. The employees at the University of Pennsylvania are paid using two methods:

- 1) Positive Pay: Indicates time input is required in order for the employees to be paid. Time input is reported using a Time Report Form (TRF)
- 2) Exception Pay: Indicates that no time input is required. The employee will be paid based on the information supplied by the job screen. This field will be automatically updated once the job class has been entered. This field is a 1-character alpha field. Valid codes for this field are:

P - Positive (Hourly employees, types 3 or 5)

E - Exception (Salaried employees, types 1,2,4,8, or 9 employees)

COMPA RATIO – The ratio between the employee's salary and the hiring maximum. This field is automatically calculated by the system.

HOURLY RATE (Appointment Hourly Rate) – The appointment hourly rate for hourly paid employees. This field will be automatically updated on the basis of the Pay Period Amount/Rate and the Standard Hours.

HOURS (Appointment Hours) – The standard number of hours in the work week, either 35 or 37.5 or 40 for all regular employees. This is a 5-character numeric field.

EMP TYPE (Appointment Employee Type) – Employees at the University of Pennsylvania are classified by type for the purpose of census reporting. This field will be automatically updated once the job class code has been updated. This is a 1-character numeric field. Valid codes for this field are:

- 1 - Exempt salaried – professional, administrative and faculty (monthly)
- 2 - Non-exempt salaried – support staff (weekly paid)
- 3 - Non-exempt hourly – part-time, temporary, and occasional workers and full-time members of certain bargaining units.
- 4 - Exempt salaried student (monthly paid)
- 5 - Non-exempt hourly student (weekly paid)
- 8 - Education Fellowship recipient – no employer-employee relationship (monthly paid)
- 9 - No employer-employee relationship – retired or disabled personnel, post-doctoral trainees, etc. (monthly paid)

ANNUAL SALARY – The yearly salary. This field must be entered for monthly and weekly salaried paid employees. The format of this field is XXXXX. For example, 18800. **Leave this field blank for hourly paid employees.**

TRF SORT CODE (Time Reporting Form Sort Indicator) – This is an optional field. The purpose is to assist in sorting Time Report Forms.

Please note: This field is no longer used as Time Reporting is performed on-line

Distribution Line Information

CNAC-ORG-B/C-FUND-OBJ-PGM-CREF – The account number to which the employee's salary will be charged. This is a 26-character field. The Payroll System will verify by comparing Object Code, Earn Type and Job Class Code, and by verifying compatibility of CNAC and ORG, BC and Fund.

ERN (Earnings Type) – Indicates how the employee's pay will be taxed. This is a 3-character alpha field. Valid codes for this field are:

Professional/Administrative Employees and Faculty (Type 1 only)

RMO - Regular Monthly Pay

Administrative Support Staff

REG - Regular Weekly or Hourly Pay (Type 2 and 3)

S10 - Shift Differential at 10% (type 3 only)

S15 - Shift Differential at 15% (type 3 only)

SHF - Shift Differential at a flat amount (type 2 only)

SUP – Supplemental Rate of pay

Student Worker (Type 5 only)

SW1 - Student Worker A/In class

SW2 - Student Worker B/Not in class

WSR - Work Study Regular

WS2 - Work Study Summer

Post-Docs (Type 9) *

PD3 - Job Class Codes: 217603, Object Code 5043 and 217703, Object Code 5043

PD4 - Job Class Codes: 217500, Object Code 5047

Graduate Students (Type 4) *

GF1 - Teaching Assistant: 217002, Object Code 5049

GF1 - Research Assistant: 216061, Object Code 5070

GF5 - Teaching Assistant: 217004, Object Code 5040

GF5 - Research Assistant: 216060, Object Code 5041

GF6 - Teaching Fellow: 217003, Object Code 5048

GF6 - Research Fellow: 217303, Object Code 5044

Educational Fellowship Recipients (Type 8) *

GF2 - Job Class Code: 217401, Object Code 5046

*Note: For all Postdoctoral and Graduate Student appointments, please refer to the "Guide to Graduate Student and Post-Doctoral Appointments," available from the Corporate Tax Office at <http://www.finance.upenn.edu/comptroller/tax/appointments.shtml>

There should only be one ERN Type per Job Class Code.

PAY PER AMT (Pay Period Amount) – The gross pay to be charged to the account number each pay period. The total of all entries in this column may not exceed the amount entered in the Pay Per.Amt/Rate field. Whole dollar amounts can be entered with or without decimal points and trailing zeros. For example, 900 or 900. Or 900.00. **Leave this field blank for hourly employees.**

PERCENT - This field is used to calculate the number of hours on time report forms. When a job assignment has more than one distribution line, a percent must be listed on each line. The sum of the entries in the PERCENT field should equal 100%. To enter the percent, type 100.00 or 100. **Leave this field blank for salaried employees.**

START (Start Date) – The date on which payments will begin to be charged to the account. Must be either the same as the BEGIN DATE or between the appointment BEGIN DATE and the END DATE. Use the MM/DD/YY format. For example, if Jane Smith received an increase effective February 13, 1989, the Start (start date) would be 02/13/89.

STOP (Stop Date) – Date when payment for this account will cease. Date must be either the END DATE or between the appointment BEGIN DATE and END DATE. Use the MM/DD/YY format.

An actual date MUST always be used in this field. DO NOT USE 99/99/99.

PAYROLL ROSTER

- This computer-generated page is wrapped around the stack of checks received each payday.
- It tells which employees have at least one line of distribution ending before the next pay cycle.

Important! Looking at the payroll roster is the only warning that at least one line of distribution will end before the next pay period ends.

Personal Data Form (005)

The **Personal Data Change** screen enables the user to inquire against basic data (i.e., current address, contact data, etc.).

```

IS0405P                UNIVERSITY OF PENNSYLVANIA                DATE: 01/30/06
PERSONNEL                ***PERSONAL DATA FORM***                TIME: 10:17:45
 100250660 CAMPBELL,LAUREEN
PROFSNL NAME: CAMPBELL,LAUREEN                SUFFIX:                PREFIX:
                --CONTACT DATA--
CURRNT ADDR1: 10 MAIN STREET                CURRNT ADDR2:
CURRNT CITY : PHILADELPHIA                CURRNT STATE: PA                CURRNT ZIP: 19140
CURRNT PHONE: 800/555-1212

PERMNT ADDR1: 10 MAIN STREET                PERMNT ADDR2:
PERMNT CITY : PHILADELPHIA                PERMNT STATE: PA                PERMNT ZIP: 19140
PERMNT CNTRY:

  WORK PHONE1: 215/898-1212                WORK PHONE2: / -                WORK ADDR: 6228
EMERG CNTCT: PAT DOE                RELATIONSHIP: FRIEND
CNTCT PHONE: 215/555-1212                AFFIL CODE:                PUBLIC MAIL CODE:
                --PERSONAL DATA--
PENN ID: 99999983                DATE OF BIRTH..: 12/15/XXXX                TRUE MARITAL ST..: S
  EDUC LEVEL:                EDUC LEVEL YEAR:                PAY DISBURSE/DISP: A D
CTZNSHP/VISA:                COUNTRY.....:                VISA EXP DATE: /                PRSD:

TRANS: 005                ID: 100250660                JOB:                ORG ID:
PF6=HELP                PF9/21=HELP
  
```

Domicile

This is the permanent address to which an employee will return whenever absent, even though there may be a temporary address while at Penn

- Should always be a street address
- Is used to determine tax status
- Address on W-4 form should be domicile

Students who maintain a domicile at their parents' address should use the Permanent Address for their parents' address and their campus/local address for the Current Address.

International scholars who maintain a domicile in their home country should have a foreign address in the Permanent Address and local address in the Current Address.

Below is a list of all fields in the Personal Data Change, a description of the field and all possible field values.

PROFSNL NAME (Professional Name) – Typically professional name will be the same as your payroll name. Professional name may be used under the following example: a person has published or become known professionally under a maiden name and has since been married. Her payroll name would be the married name; her professional name will be the name under which she is published. This field is

automatically populated by the system with the payroll name unless a professional name has been entered.

SUFFIX – Accepts from zero to four characters. Examples of valid codes for this field include Jr., Sr., Esq., PhD. Each punctuation mark counts as one character. If no suffix is required, leave this field blank.

PREFIX – Accepts from zero to four characters. Examples of valid codes for this field include Ms., Mrs., Mr., Dr., Fr. If no prefix is required, leave this field blank.

CURRNT ADDR1 – The employee's current home street address. For example, 111 Main Street. This field must be entered before the system will allow an entry in STREET2.

CURRNT ADDR2 – Additional address information, such as the apartment, building or rural delivery (RD) numbers. For example, Apt. 6, Bldg. 5, or RD 3.

CURRNT CITY – The employee's city of residence. This is a 13-character alpha field. Some city names must be abbreviated. For example, King of Prussia can be entered as KOP or King of Pruss.

CURRNT STATE – The employee's state of residence. This field is a 2-character alpha field. Use the standard 2-character postal abbreviation. For example, Pennsylvania will show as PA.

CURRNT ZIP – The zip code for the employee's current address. This field will accept up to 10 characters. For example, 19104-1401.

CURRNT PHONE – The employee's primary home phone number. The format is Area Code/XXX-XXX. For example, 215/666-6666.

PERMANENT ADDRESS - The address of permanent residence. Use permanent address for any staff, faculty, or students whose permanent residence is different than their current address, etc. For example, a student may be residing in Philadelphia to attend school, but the permanent residence may be in California; therefore, his current address would be the Philadelphia address and the permanent address would be the California address.

PERMNT ADDR1 - The employee's permanent home street address. For example, 111 Main Street. This field must be entered before the system will allow an entry in STREET2.

PERMNT ADDR2 - Additional address information, such as the apartment, building or rural delivery (RD) numbers. For example, Apt. 6, Bldg. 5, or RD 3.

PERMNT CITY - The employee's permanent city of residence. This is a 13-character alpha field. Some city names must be abbreviated. For example, King of Prussia can be entered as KOP or King of Prussia.

PERMNT STATE - The employee's permanent state of residence. This field is a 2-character alpha field. Use the standard 2-character postal abbreviation. For example, Pennsylvania will show as PA. If the employee doesn't live in the United States leave this field blank and tab to PERMNT CNTRY.

PERMNT ZIP - The zip code for the employee's current address. This field will accept up to 10 characters. For example, 19104-1401. This should only be a U.S. zip code.

PERMNT CNTRY – The employee's country of permanent residence. **Leave blank if the permanent address is within the United States.**

WORK PHONE1 (Work Telephone Number) – The employee's primary work telephone number. The format is Area Code/XXX-XXXX. For example, 215/898-6666.

WORK PHONE2 (Work Telephone Number) – A second telephone at which the employee can be reached at work. This field should be filled in only if the employee has two numbers at one location or works at two different locations. If the employee doesn't have a second number, TAB to the next field.

WORK ADDR/MAIL CODE – The employee's intramural mail code. This field is a 4-character numeric field. Must be a valid mail code, and should correspond to the Job 1 department.

EMERG CONTACT (Emergency Contact) – The individual to be contacted if an emergency arises. The format is first name(space)middle name or initial(space) last name. For example, Mary Alice Smith or Mary A. Smith.

RELATIONSHIP – The relationship the emergency contact is to the employee. This is an 8-character alphanumeric field. For example, Husband, Wife, Mother.

CONTACT PHONE (Contact Telephone Number) – The telephone number at which the emergency contact can be reached. The format is Area Code/XXX-XXXX. For example, 215/666-6666.

AFFIL CODE (Affiliation Code) – This field is used by the School of Medicine to track affiliation of doctors with other hospitals and medical centers. Contact the School of Medicine Faculty Affairs Office for a list of codes.

PUBLIC MAIL CODE (Publications Mail Code) – This field is used to identify couples where the spouse is also employed at the University or where the employee graduated from the University to avoid multiple mailings of publications (i.e. Penn Gazette). It is also used to indicate the hospital with which a physician is affiliated. This is a 1-character numeric field. Place a "1" in the field to stop multiple mailings.

PENN ID – The unique identifying number for each member of the University community. This is an 8-digit numeric field.

DATE OF BIRTH – The birth date of the employee. Use the MM/DD/YYYY format. For example, Michael Jordan was born on July 7, 1977, therefore, the Date of Birth would be 07/07/1977.

TRUE MARITAL ST (True Marital Status) – This field is to identify employee's marital status and to determine benefits enrollment. For example, if Michael Jordan is married, he will be eligible for family benefit coverage. This is a 1-character alpha field. Valid codes for this field are:

S - Single

M - Married

D - Divorced

W - Widow or Widower

ETHNICITY - The code identifying the employee's racial origin by broad ethnic group. This is a **REQUIRED** 1-character alphabetic field.

- A - Native American or Alaskan Native
- B - Black/African American
- C - White/Caucasian
- P - Pacific Islander
- R - Asian
- S - Spanish/Latino

MILITARY STATUS - The code indicating the individual's current military status. This is a 1-character alphabetic field.

- A - Active Reserve
- N - Inactive Reserve
- O - Veteran (Other than Vietnam)
- R - Retired
- V - Vietnam Era Veteran
- S - Newly Separated Veteran
- BLANK - No Veteran Status

EDUC LEVEL (Education Level) – The highest level of education achieved by the employee. This field is a 1-character alpha field. Valid codes are:

- B - No academic credentials
- C - High School Diploma or equivalent
- D - Trade Certificate
- E - Some College
- F - Associate's Degree
- G - Bachelor's Degree
- H - Master's Degree
- I - Medical Doctorate (M.D., D.D.S., D.V.M., M.D.)
- J - Other Doctorate (Dr. of Educ., Dr. of Sct., LL.D., JD)
- K - Doctor of Philosophy (Ph.D.)
- L - Other

EDUC LEVEL YEAR (Education Level Year) – The year in which the employee obtained the education level indicated in the "EDUC LEVEL" field. This is a 4-character numeric field. For example, 1980.

PAY DISBURSE/DISP (Pay Check Disbursement) – Identifies the method of pay disbursement. A paycheck is mailed to the department of all employees initially hired: therefore, for all new employees, the PAY DISBURSE/DISP field is automatically updated with CD. Employees who prefer to have their pay deposited directly into their checking or savings account, should contact the Payroll Office at 898-6301. Once Direct Deposit is established, the Payroll Office will update the PAY DISBURSE/DISP field to show AD.

CD - Check (a negotiable document that may be cashed at the employee's bank) mailed to the employee's department.

CH - Check (a negotiable document that may be cashed at the employee's bank) mailed to the employee's home.

AD - Advice (a non-negotiable statement of direct deposit) mailed to the employee's department.

AH - Advice (a non-negotiable statement of direct deposit) mailed to the employee's home.

This is a 2-character alphabetic field.

CTZNSHP/VISA (Citizenship/Visa) – The type of visa held by the employee who is not a U.S. citizen.

This is a 2-character alphanumeric field. Valid codes for this field are:

F1 - Student

F2 - Spouse or child of student

H1 - Temporary worker of distinguished merit and ability

H2 - Temporary worker performing services unavailable in this country

IM - Immigrant

J1 - Exchange visitor

J2 - Spouse or child of exchange visitor

O1 - Individual of Extraordinary Ability in sciences, education, business, athletics or the arts.

O2 - Accompanying workers

Q1 - International cultural exchange

SP – Substantial Treaty

TN – Treaty of NAFTA

Only enter these fields if individual is a Foreign National

COUNTRY – The employee's country of citizenship if the employee is not a U.S. citizen. This is a 2-character alpha field. For valid codes use Permanent Country help for directory.

VISA EXP DATE – This field contains the month and year when the visa is due to expire. This information is entered in MM/YY format.

PRSD (Permanent Residence Status Date) – Please use 9999 until further notice. If VISA EXP DATE is completed this field will be updated by the Corporate Tax Office.