# Human Resources Management Systems (HRMS)
## Payroll Voucher Participant Guide

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HRMS Payroll Voucher
Description

This document covers the navigation and use of the HRMS Payroll Voucher. Specific directions are provided for three different kinds of payroll vouchers: Biweekly, Hourly, and Monthly.

Objectives

Learn to:

• Navigate through the HRMS Payroll Voucher
• Work a biweekly payroll voucher
• Work an hourly payroll voucher
• Work a monthly payroll voucher
• Customize your voucher to accommodate your data entry needs

Business Process Overview

Business Process Description

1. The payroll processor collects the approved time sheets from hourly and biweekly employees.

2. After login to HRMS, the payroll processor opens the appropriate voucher and enters appropriate data, including hours worked.

3. The payroll processor also enters earn codes and changes funding, where appropriate.

4. The data is saved.

5. Switch to the Payroll Voucher Balances tab and verify the balances. If all is as it should be, approve the voucher.
Step-By-Step

1. Navigate to the payroll voucher
2. Search for correct department, work area, and pay group
3. Select the Payroll Voucher tab, if necessary
4. Customize your view to see correct information, if needed
5. View, modify, and edit information
   a. View system-generated information
   b. Adjust Other Earnings information and add hours, if needed
   c. Adjust Funding Codes and Accounts, if needed
   d. View Attendance Leave Balances, if needed
6. Save the document
7. Approve voucher

Glossary of Terms

Account: The funding source for a specific payroll transaction.

Earn Code: A category of pay indicating what an employee is being paid for, which defines the calculation of pay [e.g. SCK (Sick Nonexempt), FNL (Funeral), VAC (Vacation), OVT (Overtime); RGN (Regular Pay Nonexempt Biweekly)].

Empl ID: HRMS system-assigned unique identifier for each IU employee. This will never be the employee’s social security number.

Empl Rcd: Employee Record Number. Every job an employee has in the HRMS system will be assigned an Employee Record Number.

Funding Codes: Another name for Earn Code.

Job Funding: Permanent funding established via an HRMS electronic document (E-Doc). On the payroll voucher, only one-time funding changes may be made.

Other Earnings: Any type of earning different from the regular earnings of the employee, such as overtime, premium, sick, vacation, etc.

Pay Group: Payroll schedule and voucher grouping for different employee pay types, such as BW1 (biweekly staff); A10 (10-month academic); HRP (hourly PERF); HRW (workstudy); S12 (12 month professional staff). See Appendix 2 for a list of the different pay group codes.

Payroll Voucher: Document used to enter and verify employee pay before payment is calculated and processed.

Work Area: One or more work areas will be set up for every organization. Work areas will be used to limit the number of employees on a voucher to facilitate voucher processing in the PeopleSoft client.
Key Information/Tips

If you see a magnifying glass icon in a box, it means there is a searchable table or list attached.

The payroll voucher is the only HRMS client document that will be used. It may be saved with incomplete data. Also, it does not have effective-dated rows.

The **F11 toggle key** on your keyboard may be used to expand your browser window to see the screen more fully without scrolling, or to reduce the window to see menu bars.

Click ONLY ONCE on buttons or links in all HRMS activities when in the PeopleSoft client.

I. Overall Payroll Voucher Flow

In this flow, you will learn the overall process of using the payroll voucher. Following this flow, separate flows are presented for using the payroll voucher for different pay groups.

1. **Navigate to the payroll voucher through OneStart.**

Follow these instructions to navigate to the Payroll Voucher through OneStart.

On the web, go to IU’s OneStart home page at https://onestart.iu.edu/my/Start.do

Check the “Login with Safeword” box and click “login.”

Login with your network username and password and safeword card.
The OneStart home page will open.

Look for the Self Service tab listed near the top of the screen. Click the tab and select the Administrative Systems button on the left hand side of your screen. You should see a box labeled HRMS.

Click on the link that says Go to HRMS Portal. This will take you to a page that lists various options for payroll processors:

Select the type of voucher you wish to create or review.
Once in PeopleSoft you can navigate through the application using the sidebar on the left side of the screen. The menu below shows the links to take to navigate to the Payroll Vouchers within PeopleSoft.

Sidebar: Payroll for North America > Payroll Processing USA > IU Payroll Use > (Choose a voucher)

There are two types of vouchers to choose from: **Hourly Voucher** and **Faculty/Staff Voucher**.

**Hourly Voucher** is only used when processing all hourly pay groups, including hourly PERF, regular hourly, student hourly, and undergraduate workstudy.

**Faculty/Staff Voucher** is for all staff biweekly, staff monthly, and academic pay groups (non-hourly) including student academics.

In the HRMS, payroll vouchers will be organized by department, work area ID, and pay group, not by account.

For this section we will use a biweekly Faculty/Staff Voucher as an example.
To conduct a search, you may enter your department code (in the format Chart-Org, as in BL-BUS or UA-TREA), the 4-digit Voucher Code for the voucher you want to work on (if you know it), or the Pay Group of the voucher you want to work on (such as BW1 for biweekly, AS0 for 10 month academic students, A10 for 10 month academic, S12 for 12 month professional staff). After entering our search criteria click the yellow “Search” button.

2. Select the correct department, work area, and pay group voucher from the list.

For each department, work area, and pay period, there is exactly one voucher for each pay group. All employees in each department, work area, and pay group are on a single voucher in a given pay period.

A biweekly (BW1) payroll voucher looks like this:
3. Select the appropriate tab for the work you will do.

There are two tabs on the payroll voucher: **Payroll Voucher Balances** and **Payroll Voucher**. If entering information to pay an employee, select the Payroll Voucher tab. If checking balances, select the Payroll Voucher Balances tab. See Step 7 below for more information on payroll voucher balances.

The chart of accounts-department, work area ID, pay group, and pay end date are shown on the top of the voucher. The payroll voucher can be saved while it is still not completely worked.

4. Customize your view to see specific information or view the voucher in a different order.

See Appendix 1 for details.

5. Using the voucher to view, modify, and edit information.

The payroll voucher screen is divided into two to four sections, depending on the pay group. These include system-generated data on the left side, the Other Earnings section (Biweekly and Monthly only), the Funding Codes and Accounts section, and the Attendance Leave Balances section (Biweekly only). In many cases, you will need to add or modify information in these fields before you can approve the voucher.
5a. **System-generated Data (left side)**

On the left hand side of each week is the employee-specific info that is system-generated and not editable.

**NOTE:** Employees with multiple appointments will have more than one Empl Rcd number.

5b. **Other Earnings**

Other earnings can be established on all types of Payroll Vouchers. See the respective flows for details on working with the Other Earnings section, since they vary by voucher. You will never enter the regular earnings code into the Other Earnings section, for this will cause the employee to be overpaid.

5c. **Funding Codes and Accounts**

Each voucher has a section for funding codes and accounts. Any job funding established via the E-Docs (Hire, Maintain Funding) for the position will automatically appear by default. In this section, you may make one-time funding changes to the voucher. Split funding, between departments will only appear on the voucher for the department who “owns” the position.

Each pay group has funding code and account information specific to it, so see the respective flows for details.

5d. **Attendance Leave Balances**

This section only appears in Biweekly vouchers and therefore is discussed in the Biweekly Flow.

6. **Save the voucher**

None of the changes you make will be saved until you click the “Save” button (if you can’t see it, scroll down to lower left corner of page).
Key to buttons along the bottom of the screen:

**Save button:** Saves your work on this voucher  
**Return to Search:** Returns you to the previous Search screen containing the same values  
**Previous in List:** Takes you to the previous voucher in the Search results you started from  
**Next in List:** Takes you to the next voucher in the Search results you started from  
**Previous Tab** and **Next Tab:** Takes you from one tab to another.

In the HRMS payroll voucher, you can save documents in progress. That is, you can approve some of the employees but not others, and/or you can modify certain information while not yet modifying other information, and save the document.

**7. Approve the voucher**

**7a. Approving Rows (Optional)**

To approve a voucher row (week 1 or 2 record for an hourly employee), simply click the Approve button. Once you do so, the button changes to “Unapprove” and the word “APPROVED” appears on screen near the button. If you approve a voucher row in error, or later need to make changes to an approved week, click the “Unapprove” button. At that point, you can modify or add appropriate data and then re-approve the voucher row.

NOTE: You can also enter hours for earn codes or change funding distribution for all the employees on the voucher, and then go to the Payroll Voucher Balances tab to click the “Approve All” button, rather than approving each row separately.

**7b. Complete Voucher Approval**

Approve the entire voucher by going to the Payroll Voucher Balances tab and clicking on the “Approval All” button.
The button reads “Approve All” until you click on it at which time it reads “Unapprove All” (see below). Once you have clicked “Approve All,” the university payroll office sees that this voucher is complete and ready for the payroll closing process. You may go back into an Approved voucher, unapprove the voucher, and continue working in the voucher until the payroll cut-off date.

7c. Review Voucher Balance

Balance information on the Payroll Voucher Balance tabs is to be used as a check of the hours/amounts. The department payroll processor can use these amounts to check and see that they have entered all payroll data on the payroll voucher correctly.
II. Biweekly Flow

1. Navigate to the payroll voucher. Same as in Overall Flow, step 1.

2. Select the correct department and pay group voucher from the list. Same as in Overall Flow, step 2, except that you choose the Biweekly pay group (BW1).

3. Select the Payroll Voucher tab (if it is not already selected). Same as in Overall Flow, step 3.

4. Customize your view to see correct information. See Appendix 1.

5. Using the voucher to view, modify, and edit information

The Biweekly is the most complex of the three types of payroll vouchers. In addition to the standard system-generated, read-only information and the Funding Codes and Accounts section, both of which are available in all types of Payroll Voucher, the Biweekly Payroll Voucher also contains sections for Other Earnings and Attendance Leave Balances. The specifics of using these sections for a Biweekly Payroll Voucher are discussed below.

When processing the voucher for biweekly staff, note that the Regular Hours field on the top right of the Employee Earnings section will default to 40 hours, if the employee is 100% FTE (or 20 hours, for 50% FTE). The Regular Hours will never change on the payroll voucher regardless of what data is entered, but when payroll is calculated, the hours will be redistributed based on the “Other Earnings” types (such as SCK, VAC, etc.). If the employee worked their full regular hours, and funding distribution does not need to be changed, you do not need to do anything to this row for this employee.

5a. System-generated Data (left side)

This information is read-only, as described in the Overall Flow.
Name
Week (1 or 2)
(Period) Begin Date
(Period) End Date
5b. Other Earnings

On an unworked voucher, the Other Earnings fields should be blank, unless the employee is using a timekeeping system that automatically populates the hours and earn codes. Anything that has been added via Additional Pay E-Doc, such as a supplemental for this employee for this pay period, will show on the voucher in the Other Earnings field as an non-editable line.

When Job Funding is established (using a Hire or Maintain Funding E-Doc), if you set up job funding for earnings codes other than regular, those earnings codes will show in the Other Earnings fields to make data entry easier. Such job funding may be set up for overtime, shift, premium, etc.

To enter hours used, select the earn code from the lookup next to the Earn field, or type in the earn code if you know it. To select an earn code, once you are at the lookup screen, you do not need to put anything into the blank fields – just click on the “Lookup” button.

**TIP:** To help narrow your search, “wildcards” may be used. For example, for a vacation code, enter “v%” and the “Lookup Earn” screen will show all codes beginning with v or V.

The search results will be the valid values for this pay group (BW1) as shown below. Note that the lookup screen will only display part of the search results. Scroll down to see additional earnings codes. If the “View All” words are highlighted, not all of the results are showing on this screen. Click on “View All” to see all of the choices, up to the first 300.

**Look Up Earn**

| IU Document Type: | JF |
| Pay Group:       | BW1 |
| Earnings Code:   | begins with |

**Search Results**

<table>
<thead>
<tr>
<th>earn code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABS</td>
<td>NO PAY-Absent without benefits</td>
</tr>
<tr>
<td>ADW</td>
<td>Adverse Working Conditions</td>
</tr>
<tr>
<td>AFL</td>
<td>NO PAY-Absent without Pay-FNLA</td>
</tr>
<tr>
<td>ANV</td>
<td>Anticipated Vacation</td>
</tr>
<tr>
<td>AWB</td>
<td>NO PAY-Absent with benefits</td>
</tr>
<tr>
<td>BHS</td>
<td>Benefit Hours Supplement</td>
</tr>
<tr>
<td>CAL</td>
<td>Call Back Overtime</td>
</tr>
<tr>
<td>CMP</td>
<td>Comp Time Payout</td>
</tr>
</tbody>
</table>

Scroll down for more options.
The type of earn code selected will determine whether the Hours field, Amount field, or both the Hours and Amount fields are available. Where both are available, both hours and amounts need to be entered for that earn code. If you need more than one earn code for this week for the employee, add a line by clicking on the add (plus) button.

Then follow the same process above for selecting the next earn code and entering data into the Hours or Amount fields. If you add a line in by mistake, delete by clicking on the delete (minus) button.

**NOTE:** Do not choose RGN (Regular Pay Non-exempt staff) as an Other Earnings Code and put hours in it. If you do, the employee will be overpaid.

While the OVT code is available for entering overtime hours, you also have a choice of entering the number of overtime hours directly into the Overtime Hours field to the right of the first earn codes line, instead of into the other Earnings fields (see circled area in example below). Enter the number of overtime hours worked and the system will make the necessary calculation to inflate those hours.

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**5c. Funding Codes and Accounts**

Permanent funding is established via the employee Job Funding (whether on the initial hire or for subsequent changes in E-Docs). On the payroll voucher, you would only use the Funding Codes and Accounts section if you want to make one-time funding changes. To access the information in this section, click on the white arrow/triangle in the header next to the word “Funding.” (See circled area in the example on the following page.)
For a Biweekly employee, RGN (regular pay non-exempt staff) funding distribution must be set up at the time of job funding when an employee is hired. The RGN line in this section is the minimum funding, and must consist of an account, object code (defaulted from the employee type), and percent or amount. When distributing funding by amount, one and only one line must be marked for receiving any residual funds. Use the Order field to indicate the order of funding distribution if multiple lines for the same earn code are entered.

There is a lookup available anywhere a magnifying glass in a box is shown.

The system will check to see that the account is a valid, active account (or not more than 30 days expired for a C&G account). Note that ANY valid, active account may be used in this one-time funding distribution section of the voucher; there are no restrictions based upon department or campus. Any valid value may also be used in the other subaccounting fields. Click on the yellow “Show Details” button at the top of the screen to see the subaccounting fields. The Org Ref ID field is a free-form field with no validation checking. Do not use the Add/Seq field if it shows in the funding line (see diagram below).
For each earn code, you can only have funding for either amount or percent, not both. You will get an error message if you set up both percent and amount for the same earn code. To change from percent to amount, or vice versa, you must first delete the value in the existing field and tab out of the field. The other field will then become available for data entry.

5d. Attendance Leave Balances

The Attendance Leave Balances section presents a quick picture for the person completing the voucher to see the status of this employee’s leave balances. To access the information in this section, click on the white arrow/triangle in the header next to the word “Attendance.” (See circled area in the example below.)

Note, however, that when there are Attendance Leave Balances, and you enter earn codes that have balances into the Other Earnings section, you will see the values in the Attendance Leave Balances section under “Used This Period” when you tab out of the Other Earnings line. If you try to use more hours than are available, you will get a warning message. However, you will still be allowed to approve the voucher, and the system will pay the employee for these hours!

Finally, to complete the Payroll Voucher section, you may save the payroll voucher when you have made changes, without approving the voucher. Thus, if you need to leave the voucher and come back to it, your changes will be there but the voucher will still need to be approved.

NOTE: The payroll voucher does NOT route for approval, but approves completely once the “Approve All” button on the Payroll Voucher Balances tab is clicked.

The Balances tab should be used to check that the total of the individual employee’s hours matches what is expected by the person doing the data entry.

6. Save the voucher

Same as in Overall Flow, step 6.
7. Approve voucher

Approval for Biweekly Payroll Vouchers works as discussed in the Overall Flow.

7a. Review Voucher Balance

Balance information on the Payroll Voucher Balance tabs is to be used as a check of the hours/amounts. Note that RGN (regular) hours do not change regardless of what other earnings have been entered on the voucher. The department payroll processor can use these amounts to check and see that they have entered all payroll data on the Payroll Voucher correctly.
III. Hourly Flow

1. Navigate to the payroll voucher.

Same as in Overall Flow, step 1, but be sure to choose “Hourly Voucher.”

2. Select the correct department and pay group voucher from the list.

Same as in Overall Flow, step 2. Choose an hourly pay group (see Appendix 2).

3. Select the Hourly Payroll Voucher tab (if it is not already selected).

Same as in Overall Flow, step 3. The initial state of an hourly payroll voucher can be seen in the following screen shot.

4. Customize your view to see specific information or view the voucher in a different order.

See Appendix 1.

5. Using the voucher to view, modify, and edit information

Compared to the Biweekly, the Hourly Payroll Voucher is simpler, in that it has fewer options. However, the Hourly Payroll Voucher requires input for every single employee who worked during the week; no default set of hours is automatically filled in. If an employee turns in zero hours for a week, nothing has to be done to voucher row for that employee.

The specifics of using these sections for an Hourly Payroll Voucher are discussed below.
5a. System-generated Data (left side)

This information is read-only, as described in the Overall Flow.

The Hourly Payroll Voucher displays different information than the Biweekly in the read-only section on the left of the screen under the Employee Earnings header. FTE is removed, and Reg Amt (Regular Amount) and OT Amt (Overtime Amount) fields are added. Once hours are entered under the Funding Codes and Amounts section and the transaction is saved, Reg Amt multiplies the hourly rate times the hours of the regular earn code, and OT Amt multiplies the OVT hours times the time-and-a-half rate.

Note: Other Earnings—The Hourly Payroll Voucher does not have an Other Earnings section, in contrast to the biweekly voucher. However, you can still enter other earnings on an hourly voucher: other earnings codes are entered into the Funding Codes and Accounts section.

5b. Funding Codes and Accounts

The Funding Codes and Accounts section only allows hours (not amounts) to be entered. The regular earn code (see Appendix 2) defaults in from the Job Funding that was set up at the time of hire.

Note: The main difference from the Biweekly Payroll Voucher is that there is no separate section for Other Earnings and no Attendance Leave Balances. Lines for additional earn codes (such as OVT) may be added by clicking on the plus button.

The earn codes available for hourly employees are different from those of biweekly employees.

Click on the search button (magnifying glass in a box) for the Lookup Earn screen. The search results will be the valid values for this pay group (such as HRP or HRR for example). If you cannot see them all, scroll down to see the results further down. Click on a code to return that code to the Funding Codes and Accounts section of the voucher.
6. Save the voucher
Same as in Overall Flow, step 6.

7. Approve the voucher
Same as in Overall Flow, step 7.
IV. Monthly Flow

1. Navigate to the payroll voucher.

Same as in Overall Flow, step 1.

2. Select the correct department and pay group voucher from the list.

Same as in Overall Flow, step 2, except that you choose a Monthly pay group (see Appendix 2).

3. Select the Payroll Voucher tab (if it is not already selected).

Same as in Overall Flow, step 3.

Your Payroll Voucher should look similar to the one below:

4. Customize your view to see specific information or to view the voucher in a different order.

See Appendix 1.

5. Using the voucher to view, modify, and edit information

The Monthly Payroll Voucher looks very similar to the biweekly voucher, with the exceptions noted below.

5a. System-generated Data (left side)

The system-generated data on the left of the screen under the Employee Earnings header has all the same information except hourly rate is replaced with Salary (the monthly gross salary for this job).

5b. Other Earnings
The Other Earnings section on the Monthly (staff and academic) voucher will mainly be used to show pay for special monthly employee types (such as academic students, adjunct faculty) as well as additional pay created via a personnel job action (such as supplemental pay).

**Note:** Do not use the regular pay earn code in Other Earnings (see Appendix 2) because the employee will be overpaid if you do so.

To enter Absence time (ABE) on a monthly voucher, you will need to enter the total HOURS that the employee did NOT work. The system will divide the salary by 2080 to come up with an hourly rate and subtract the appropriate amount from the monthly salary.

### 5c. Funding Codes and Accounts

Similar to Funding Codes and Accounts in Biweekly Flow, step 5c. Regular monthly funding must be set up at the time of job funding when an employee is hired. This code will vary according to the pay group (see Appendix 2).

The regular earn code line in this section is the minimum funding, and must consist of an account, object code (defaulted from the employee type), and percent or amount. When distributing funding by amount, one and only one line must be marked for receiving any residual funds. Use the Order field to indicate the order of funding distribution if multiple lines for the same earn code are entered.

The system will check to see that the account is a valid, active account (or not more than 30 days expired for a C&G account). Note that ANY valid, active account may be used in this one-time funding distribution section of the voucher; there are no restrictions based upon department or campus. Any valid value may also be used in the other subaccounting fields. Click on the yellow “Show Details” button at the top of the screen to see the subaccounting fields. The Org Ref ID field is a free-form field with no validation checking. Do **not** use the Add/Seq field if it shows in the funding line.

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**5d. Attendance Leave Balances**
On the Monthly Payroll Voucher, there are no Attendance Leave Balances.

6. Save the voucher

Same as in Overall Flow, step 6.

7. Approve the voucher

The Payroll Voucher Balances tab for monthly vouchers is much simpler than those of the biweekly or hourly balances. You will see the total hours (if appropriate) and dollar amount for all the employees.

7a. Review Voucher Balance

Balance information on the Payroll Voucher Balance tabs is to be used as a check of the amounts. The department payroll processor can use these amounts to check and see that they have entered all payroll data on the Payroll Voucher correctly.
Appendix 1

Navigating/Customizing View

It is possible to customize the voucher for ease in finding an employee or working the voucher. If you need to find a specific employee, use the left-hand section at the top of the voucher to search by typing in the employee’s name (last name first, case-sensitive, exactly as it is in the system) in the blank field to the right of the word “Find” and selecting “In Name” from the drop-down list in the next field. Or, you can type in the Empl ID, and choose “In Empl ID” in the same the drop-down list. Then click on the yellow “Find” button to return to that employee’s Weeks 1 and 2. Remember, the employee’s SSN will NOT work here – the Empl ID must be used.

If you want to see all employees whose lines are still unapproved, select “Unapproved” from the drop-down list and click on “Find.” Other types of searches may also be performed using the Find fields at the top left.
Click on the yellow “Show Details” button to see fields for all the subaccounting on the Funding Codes and Accounts. If you do not want to see subaccounting details, click on the same button when it reads “No Details.” The drop-down list on the right will allow you to sort whatever records are being displayed by either name or Empl ID.
## Appendix 2
### Pay Group and Regular Earning Codes

Below is a listing of the various pay groups and their corresponding regular earning codes.

<table>
<thead>
<tr>
<th>Company</th>
<th>Pay Group</th>
<th>Description</th>
<th>Reg Earn Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>IU</td>
<td>A10</td>
<td>Academic 10 Pay</td>
<td>RGA</td>
</tr>
<tr>
<td>IU</td>
<td>A12</td>
<td>Academic 12 Pay</td>
<td>RGA</td>
</tr>
<tr>
<td>IU</td>
<td>AS0</td>
<td>Academic Student 10 Pay</td>
<td>RGS</td>
</tr>
<tr>
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<td>AS2</td>
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<td>RGS</td>
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<td>IU</td>
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<td>Hourly Overtime Only</td>
<td>OOR</td>
</tr>
<tr>
<td>IU</td>
<td>HRP</td>
<td>Hourly PERF</td>
<td>RGP</td>
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<td>IU</td>
<td>HRR</td>
<td>Hourly Reg</td>
<td>RGH</td>
</tr>
<tr>
<td>IU</td>
<td>HRW</td>
<td>Hourly Workstudy</td>
<td>RGW</td>
</tr>
<tr>
<td>IU</td>
<td>RES</td>
<td>Resident Appointees</td>
<td>REG</td>
</tr>
<tr>
<td>IU</td>
<td>RES</td>
<td>Retirement – No Pay</td>
<td>REG</td>
</tr>
<tr>
<td>IU</td>
<td>S10</td>
<td>Staff 10 Month</td>
<td>REG</td>
</tr>
<tr>
<td>IU</td>
<td>S12</td>
<td>Staff 12 Month</td>
<td>REG</td>
</tr>
<tr>
<td>IU</td>
<td>SUM</td>
<td>Summer Session</td>
<td>RGA</td>
</tr>
</tbody>
</table>
Appendix 3

Inserting Extra Rows

You can use the button on rows with Time data, contract pay, holiday accruals, or other types of Other Earnings that you can or cannot modify. The button adds a blank row under the Other Earnings section.

After the blank row has been inserted under the Other Earnings section, you may enter others earn codes for that employee.
Appendix 4

Finding Job Data

In order to find the primary job of an employee, you will need to navigate to the menu shown below.

Navigation: Menu > Workforce Administration > Job Information > Job Data

After you select Job Data you will be taken to the search screen seen below.
To search for an employee’s job information you can enter the following:

- 10-digit Employee ID (EmplID),
- Name (in the format “Last name,First name” being careful that you do not have any spaces),
- Last Name

If you want to see job history, make sure to check the Include History box above the Search button.

When entering names, the system treats them as if they ended in a wildcard. For instance, typing “John” in the Last Name field would also return results for employees with the last names beginning with “John”: John, Johnson, Johnston, etc.

If employees have more than one job they will have more than one Employee Record Number (Empl Rcd #).

If the employee holds two or more jobs within your Department, the Job indicator field will tell you if the selected job is the primary or secondary job. See the circled data shown above.

Paychecks and Pay advices are distributed to the department where the employee’s primary job is located regardless of where that employee worked during any given pay period.
Appendix 5

Pending Vouchers & Confirmed Vouchers in HRMS

Pending Vouchers

Pending Vouchers are vouchers that have not been fully approved. They may be completely unprocessed (i.e., no data entered and no rows approved), partially worked, or previously-approved vouchers that have become unapproved and pending again because of a job action applied to this voucher through the nightly batch cycle. Pending vouchers must be completed and fully approved before actual pay can be calculated and confirmed.

Navigation: Payroll for North America > Payroll Processing USA > IU Payroll Inquire > Non-Hourly or Hourly Pending Vouchers. The link will display the following screen:

In the fields at the top of the screen, put in whatever criteria you have, using the lookup if needed:

Pay Run ID
Company (IU)
Business Unit (IUBLA, IUINA, IUSBA, etc) (note: once you enter the business unit, you can then enter or look up the dept code, such as BL-BUS)

Then, click on the “Fetch” yellow button at the right of the screen. If there are any pending vouchers to be processed and approved, they will be returned in the bottom part of the screen:

Only faculty/staff vouchers will be normally shown as pending. Hourly vouchers will not show as pending vouchers unless at least one hour for one hourly employee has been entered and saved on an hourly voucher, and the voucher has not had the “Approve All” button clicked.

From this information, you can go into Home > Compensate Employees > Manage Payroll Process (US) > Use, choosing the Faculty/Staff or Hourly voucher depending on the Pay Group indicated on the “Pending” screen, and find the specific open voucher using both Pay Group and Work Area ID fields.

**Confirmed/Historical Vouchers**

Confirmed vouchers (also called “Historical Vouchers”) are vouchers that have gone completely through the payroll process and resulted in pay for employees. Although you can access Confirmed vouchers through the Home > Compensate Employees > Manage Payroll Process (US) > Use path, once you search for and choose a specific confirmed voucher, the panel displayed is a read-only panel. You may choose Faculty/Staff Confirmed vouchers or Hourly Confirmed vouchers.

Confirmed voucher information is payroll history and for reference only in the event you need to research what was entered on a payroll voucher. Due to the large number of vouchers, the user will be required to enter in company, paygroup, and pay end date. If these values are not entered the user can expect to get the following error message:
Values for Company, Paygroup, and Pay End Date must be entered. Use an Advanced Search to enter values for these fields. (0,0)

The PeopleCode program executed an Error statement, which has produced this message.