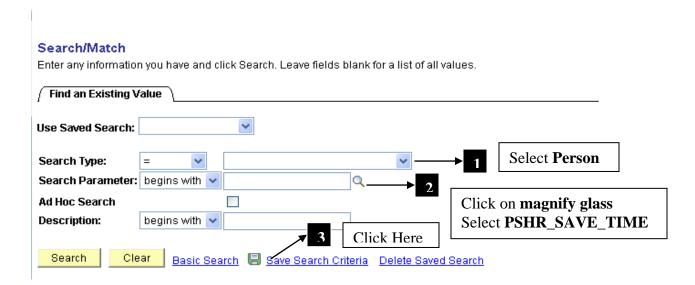
Set up for FIRST TIME Search ONLY:

PeopleSoft HRMS 8.9 Navigation

Workforce Administration > Personal Information > Search for People



NOTE: <u>Step 4</u> allows you to save Steps #1-3 under the name you selected. Once this step is created you will only have to select your Search Name and PeopleSoft will take you directly to the Search Criteria page.

Search/Match Save Search As Name the search and then click Save. Name of Search: Enter a name that you will recognize (i.e. HR People The saved search will contain these values: Search) Search Type: Person Search Parameter: begins with PSHR_SAVE_TIME Ad Hoc Search Description: begins with Return to Advanced Search Click Here Then Click Here

Search/Match Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Use Saved Search: Test Search Type: Person Search Parameter: begins with 💌 Q PSHR_SAVE_TIME Ad Hoc Search **Description:** begins with 💌 Search Clear Save Search Criteria Delete Saved Search Basic Search Click Here 1st time only, click **user default,** then Search Result Code: type PSHR_General in the search 7 User Default result box, and click OK. Search Criteria Search Fields Value Q Address Line 1 City Q First Name Search Q Last Name Search

Once you've completed these steps to set up the search match you will not need to do this again.

Q

Return to Step 2 on page 1 of this section to conduct the search. (Mapped on the next page)

Date of Birth

Gender

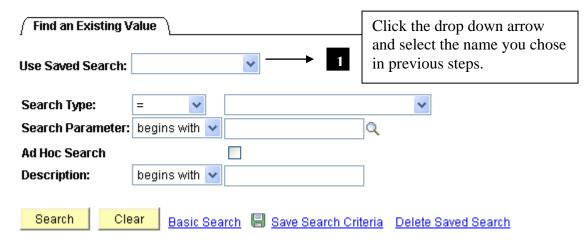
Always look up new employees to determine if there is an existing Employee ID. Since we now share the database with the students, the majority of employees you hire will already have an ID. Enter as many fields as possible to obtain the closest match.

PeopleSoft HRMS 8.9 Navigation

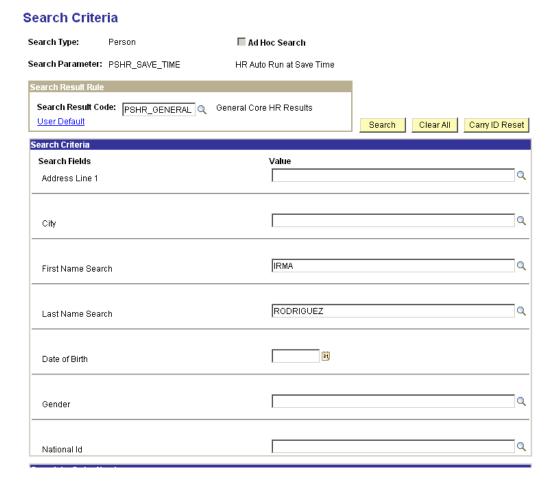
Workforce Administration > Personal Information > Search for People

Search/Match

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



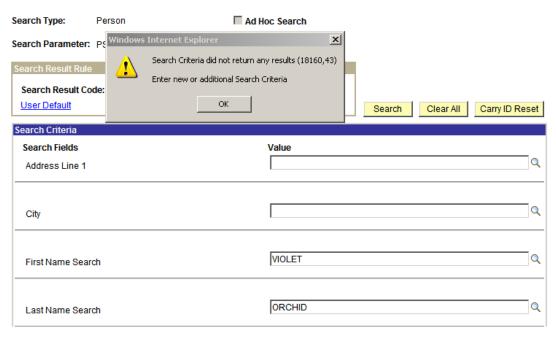
You will immediately be taken to the search criteria page.



2) Enter at least the following fields (if you have all of this information) to ensure a correct match:

- a. Date of Birth
- b. First Name
- c. Last Name
- d. National ID (SSN) (if available)
- e. Enter Gender if no SSN is available (M = Male; F = Female)
- 3) Click **yellow search button.** Search Results are automatically displayed.

Search Criteria



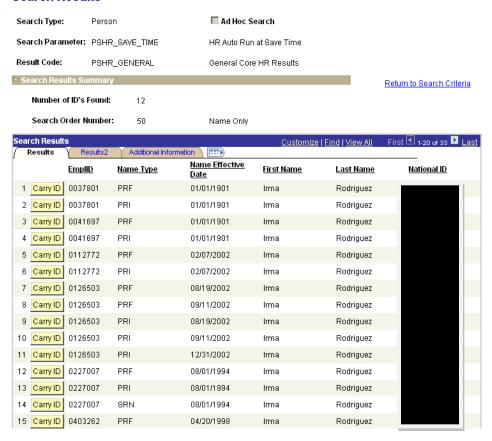
If this window pops up, search found no matching results.

SECOND SEARCH with name only is required, if still no results,

Conduct a THIRD SEARCH with social security number only if available.

If any matches are found, review personal data to confirm a match.

Search Results



4) Click Additional Information tab.

Search Results



5) Click the Relations link at the far right, to determine if this is a student or an employee. This is an employee <u>only</u> if Employee Box is checked.

Relations with Institution Detail First Name: ID: 0126503 Alejandra Last Name: Rodriguez Currently Is A(n) Alumni (L): $\overline{\lor}$ Student Applicant (A): V Employee: Г Financial Aid (F): V Prospect (P): Student (S): Student Financials (I): Recruiter (RCR): Advisor (AVS): \Box Instructor (IST): Friend (FND): Return

- 6) After verifying the information available, write down the PeopleSoft ID of the closest match.
- 7) Perform a 2nd search using just the first and last name to make sure there is not a student record without a SSN.

^{***}If a current employee or term within last year, no I-9 is needed unless documents on original I-9 have expired.