Updated Search Match Procedures

**Set up for FIRST TIME Search ONLY:**

PeopleSoft HRMS 8.9 Navigation

Workforce Administration > Personal Information > Search for People

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**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: 

**Search Type:**

<table>
<thead>
<tr>
<th>Search Parameter</th>
<th>=</th>
<th>begins with</th>
</tr>
</thead>
</table>

**Ad Hoc Search**

| Description | begins with |

1. **Select Person**

Click on magnify glass

Select **PSHR_SAVE_TIME**

2. **Click Here**

3. **Click Here**

NOTES: Step 4 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 Search)

The saved search will contain these values:

- **Search Type:** Person
- **Search Parameter:** begins with PSHR_SAVE_TIME
- **Ad Hoc Search**
- **Description:** begins with

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5. **Click Here**

6. **Then Click Here**
Updated Search Match Procedures

**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 PSHR_SAVE_TIME
  - **Ad Hoc Search**
  - **Description:** begins with

  - **Search**  **Clear**  **Basic Search**  **Save Search Criteria**  **Delete Saved Search**

  **7**  **Click Here**

1st time only, click user default, then type PSHR_General in the search result box, and click OK.

<table>
<thead>
<tr>
<th>Search Result Code</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Default</td>
<td></td>
</tr>
</tbody>
</table>

**Search Criteria**

<table>
<thead>
<tr>
<th>Search Fields</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>First Name Search</td>
<td></td>
</tr>
<tr>
<td>Last Name Search</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
</tbody>
</table>

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

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

Find an Existing Value
Use Saved Search: [drop-down arrow] [name chosen in previous steps]

Search Type: [drop-down arrow]
Search Parameter: begins with [text field]
Ad Hoc Search [on/off]
Description: begins with [text field]

Click the drop down arrow and select the name you chose in previous steps.

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.
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.
4) Click Additional Information tab.
5) Click the Relations link at the far right, to determine if this is a student or an employee. This is an employee only if Employee Box is checked.

**Relations with Institution Detail**

<table>
<thead>
<tr>
<th>First Name:</th>
<th>Alejandro</th>
<th>ID: 0123503</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name:</td>
<td>Rodriguez</td>
<td></td>
</tr>
</tbody>
</table>

Currently is A(n):

- Alumni (A):
- Student Applicant (S):
- Employee:
- Financial Aid (F):
- Prospect (P):
- Student (S):
- Student Financials (S):
- Recruiter (RCR):
- Advisor (AVS):
- Instructor (IST):
- Friend (FND):

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.***