Updated Search Match Procedures

Set up for FIRST TIME Search ONLY:

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: [▼]

Search Type: [= ▼] [▼] → **1** Select **Person**

Search Parameter: [begins with ▼] [🔍] → **2**

Ad Hoc Search [ ] Click on **magnify glass** Select **PSHR_SAVE_TIME**

Description: [begins with ▼] [ ] **3** Click Here

[Search] [Clear] Basic Search 💾 Save Search Criteria Delete Saved Search

NOTE: 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: [ ] → **4** 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

💾 Save Return to Advanced Search

5 Click Here

6 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 | PSHR_SAVE_TIME 🔍

Ad Hoc Search ☐

Description: begins with | [   ]

[Search] [Clear]   Basic Search   💾 Save Search Criteria   Delete Saved Search

7 | Click Here

Search Result Rule

Search Result Code: [   ] 🔍
User Default

7

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

Search Criteria

Search Fields	Value
Address Line 1	[ ] 🔍
City	[ ] 🔍
First Name Search	[ ] 🔍
Last Name Search	[ ] 🔍
Date of Birth	[ ] 📅
Gender	[ ] 🔍

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)

Updated Search Match Procedures

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:

1

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

Search Type: =

Search Parameter: begins with

Ad Hoc Search

Description: begins with

Search   Clear   Basic Search   Save Search Criteria   Delete Saved Search

You will immediately be taken to the search criteria page.

Updated Search Match Procedures

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

Search Type: Person   ☐ Ad Hoc Search

Search Parameter: PS

Windows Internet Explorer ✕

⚠ Search Criteria did not return any results (18160,43)

Enter new or additional Search Criteria

OK

Search Result Rule

Search Result Code:

User Default   Search   Clear All   Carry ID Reset

Search Criteria

Search Fields	Value
Address Line 1	
City	
First Name Search	VIOLET
Last Name Search	ORCHID

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

Search Type:	Person		Ad Hoc Search
Search Parameter:	PSHR_SAVE_TIME		HR Auto Run at Save Time
Result Code:	PSHR_GENERAL		General Core HR Results

Search Results Summary   Return to Search Criteria

Number of ID's Found:	12	
Search Order Number:	50	Name Only

Search Results   Customize | Find | View All   First ◄ 1-20 of 33 ► Last

Results	Results2	Additional Information					
	EmplID	**Name Type**	**Name Effective Date**	**First Name**	**Last Name**	**National ID**	
1	Carry ID	0037801	PRF	01/01/1901	Irma	Rodriguez	
2	Carry ID	0037801	PRI	01/01/1901	Irma	Rodriguez	
3	Carry ID	0041697	PRF	01/01/1901	Irma	Rodriguez	
4	Carry ID	0041697	PRI	01/01/1901	Irma	Rodriguez	
5	Carry ID	0112772	PRF	02/07/2002	Irma	Rodriguez	
6	Carry ID	0112772	PRI	02/07/2002	Irma	Rodriguez	
7	Carry ID	0126503	PRF	08/19/2002	Irma	Rodriguez	
8	Carry ID	0126503	PRF	09/11/2002	Irma	Rodriguez	
9	Carry ID	0126503	PRI	08/19/2002	Irma	Rodriguez	
10	Carry ID	0126503	PRI	09/11/2002	Irma	Rodriguez	
11	Carry ID	0126503	PRI	12/31/2002	Irma	Rodriguez	
12	Carry ID	0227007	PRF	08/01/1994	Irma	Rodriguez	
13	Carry ID	0227007	PRI	08/01/1994	Irma	Rodriguez	
14	Carry ID	0227007	SRN	08/01/1994	Irma	Rodriguez	
15	Carry ID	0403262	PRF	04/20/1998	Irma	Rodriguez	

4) Click **Additional Information** tab.

Search Results

Search Type:	Person		Ad Hoc Search
Search Parameter:	PSHR_SAVE_TIME		HR Auto Run at Save Time
Result Code:	PSHR_GENERAL		General Core HR Results

Search Results Summary   Return to Search Criteria

Number of ID's Found:	12	
Search Order Number:	50	Name Only

Search Results   Customize | Find | View All   First ◄ 1-20 of 33 ► Last

Results	Results2	Additional Information			
			EmplID		
1	Carry ID	0037801	Person Organizational Summary	Relations With Institution	
2	Carry ID	0037801	Person Organizational Summary	Relations With Institution	
3	Carry ID	0041697	Person Organizational Summary	Relations With Institution	
4	Carry ID	0041697	Person Organizational Summary	Relations With Institution	
5	Carry ID	0112772	Person Organizational Summary	Relations With Institution	
6	Carry ID	0112772	Person Organizational Summary	Relations With Institution	
7	Carry ID	0126503	Person Organizational Summary	Relations With Institution	
8	Carry ID	0126503	Person Organizational Summary	Relations With Institution	
9	Carry ID	0126503	Person Organizational Summary	Relations With Institution	
10	Carry ID	0126503	Person Organizational Summary	Relations With Institution	
11	Carry ID	0126503	Person Organizational Summary	Relations With Institution	

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: | Alejandra | ID: | 0126503 |
| Last Name: | Rodriguez | | |

	Currently Is A(n)
Alumni (L):	☐
Student Applicant (A):	☑
Employee:	☑
Financial Aid (F):	☐
Prospect (P):	☑
Student (S):	☐
Student Financials (I):	☐
Recruiter (RCR):	☐
Advisor (AVS):	☐
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.**