Northwestern | myHR

myHR Administration

Data Lookup Guide

  Revised 5/2/2017

QUICK ACCESS TO MYHR ADMINISTRATION

Accessing myHR Administration Functions

Users of myHR Administration must successfully complete **HRS101: myHR Lookup Training** and receive proper security authorization to access the system.

Once training and authorization are finished, myHR Administration may be accessed via www.northwestern.edu/myHR with your Northwestern NetID and password.

myHR is protected by Multi-factor Authentication (MFA); you must have your MFA-registered phone or device available when logging in.

Training Classes

myHR offers numerous regular and on-demand training classes for a variety of administration components and procedures. Currently scheduled courses can be found by logging into myHR with your NetID and password. Select the "Learning" tile to review your training history and search for courses. All myHR course numbers begin with "HRS" (Human Resources Systems).

For questions about training classes, contact the Human Resources Workplace Learning division at workplace-learning@northwestern.edu.

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myHR Assistance

For help with the myHR system beyond the initial training classes, contact:

myHR Help
847-467-4800 / myHRhelp@northwestern.edu
Monday-Friday, 8:30am-5:00pm

Webpages

myHR Login (log in to the system)**:**
www.northwestern.edu/myHR

myHR Administrator Information (view system procedures, documentation and code references)**:**
www.northwestern.edu/myHR/admin

Payroll Administrator Information (see procedures, forms and deadlines related to payroll processing)**:**
www.northwestern.edu/hr/managers-administrators/payroll-administration

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myHR Manual

Many fields and transactions described in this Data Lookup Guide are formally defined in the myHR procedural manual. Refer to the Manual for specific information to supplement the technical overview presented here.

http://www.northwestern.edu/hr/about/announcements-initiatives/myHR/manual/myHR_manual.pdf

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Section 1

Introduction to Positions, Appointments, and myHR Data Codes

Position and Appointment Definitions

Most information stored in myHR is related to a position at Northwestern or an individual's appointment to a position. In order to understand the organization of myHR information, it is important first to understand the difference between a position and an appointment, and how the two interact.

Position

The term "position" refers to a collection of duties, requirements, and details that together create a general description of work at Northwestern. Details of a position are irrespective of an individual; that is, if one person leaves the position and a new one enters, the details of the position typically remain untouched.

Some examples of position-related data are:

- the **department** in which the job resides
- whether the position is **full-time** or **part-time**
- the **position type** (faculty, staff, student, non-employee)
- the **job title** and corresponding **job code**
- the funding account, or **chartstring**, that will be charged for related salary/stipend

➔ Consider how the items above would *not* change when a new person enters the position.

1-to-1 Position: A 1-to-1 Position may be filled by only one employee at any particular time; this is true for the majority of regular faculty and staff positions at Northwestern.

1-to-Many Position: Up to 35 people to be assigned to the same position at the same time. In this scenario, all Position data (e.g. department, location, funding, job title) must be shared by each individual. 1-to-Many positions are most common for adjunct faculty and graduate students. 1-to-Many positions are never required; they may be used at the department's discretion.

Appointment

The term "appointment," more commonly referred to as a "job" for staff members, takes the general information of a position and adds more data that *is* specific to an individual. Data found on the appointment record likely *will* change each time a person leaves or is hired into that position.

Some examples of Appointment data are:

- **compensation** (hourly or monthly salary)
- **appointment start** and **end dates**
- a faculty member's **tenure status**
- the **contract period** for which the individual is appointed
- **leaves of absence**

➔ These appointment data, unlike those associated with a position, are always tied to an individual and may change person to person.

Action/Reason Codes

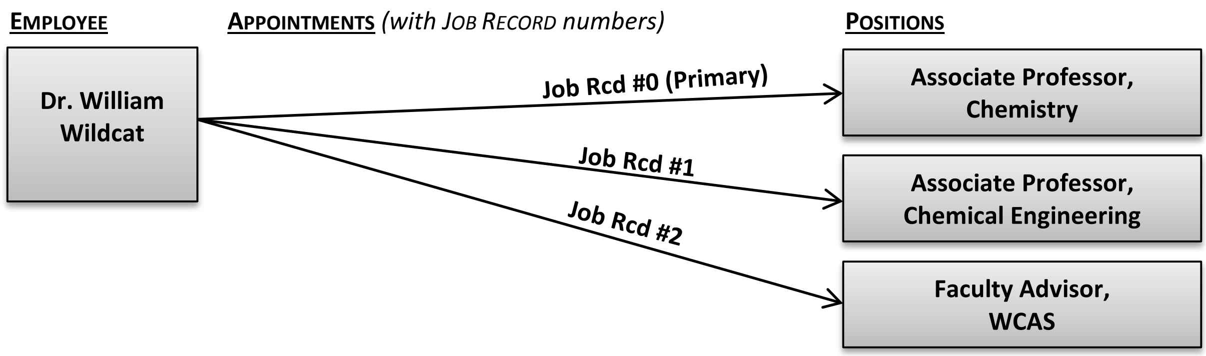
Each time Position or Appointment data is added or modified in myHR, Action and Reason codes are assigned to explain what happened and why. These codes can be seen on related system pages (Appointment Overview, Current Salary, Position Data, Job Data) and provide a quick summary of how information has changed over time. For example, when reviewing an employee's history on Job Data, the promotion code (PRO) will help you identify when the employee received a promotion.

Job Record

All records at Northwestern (except for temporary work) start out as a POSITION – a general set of responsibilities that must be completed. When an individual is hired, he or she is *appointed* to that Position.

A JOB RECORD is used to identify each appointment an individual holds. Job Record numbers always begin with #0 and count up consecutively.

Some employees, particularly faculty, have multiple appointments at the same time. For example, a faculty member who teaches in two departments *and* serves as a Faculty Advisor will have three JOB RECORDS:



Primary Appointment: The Primary Appointment for a faculty or staff employee is usually JOB RECORD #0; this is the main job for which that employee was hired and indicates the department that holds ultimate responsibility.

Feinberg Teaching Faculty: For teaching faculty in the Feinberg School of Medicine, RECORD #0 is the primary *teaching* appointment at NU; RECORD #1 is their associated *clinical* appointment at Northwestern Medical Group (NMG). Any additional teaching or administrative appointments will begin at #2.

Note: Medical faculty clinical (NMG) appointments are indicated in myHR and are paid through Northwestern payroll in combination with NU salaries. Veteran's Administration (VA) appointments are indicated in myHR but are *not* paid via NU. Appointments at Lurie Children's Hospital (LCH), Northwestern Memorial Hospital (NMH), and other clinical settings are *not* indicated in myHR nor paid through the University. Non-University staff of NMG, NMH, and LCH are *not* visible in myHR unless they have been added for the sole purpose of gaining access to Northwestern systems.

Graduate Students: Graduate student records often contain multiple appointments that may start and stop at various times. Because of the way Graduate Student records are maintained, they do not conform to any particular pattern and do not have a "Primary" appointment.

Temporary Employees: Temporary employees and work-study students *do not* have POSITION data; their records contain only APPOINTMENT information. Job Record numbers for temporary employees do not hold any particular pattern, and they do not have a specific "Primary" appointment.

Data Codes

Most records in myHR contain numbers and codes that provide descriptive information about the data. These codes can be used to identify characteristics of a record and must be referenced when requesting a change to position or appointment information.

Position Number

Every general position has a unique 8-digit number, called the Position Number. No two positions will have the same number; the Position Number must be used to review or submit changes to any position data.

Job Code

A Job Code is a 6-digit number that provides two pieces of information:

- the **Job Title**: every Job Code is related to a specific, official Northwestern job title
- the **Payroll Account**: each Job Code specifies which chartstring payroll account code (last 5 digits of a chartstring) must be used to pay the related salary

Some examples of Job Codes are:

- 100133 – Title: *Program Assistant 2*; Payroll Account: *60103*
- 100022 – Title: *Professor*; Payroll Account: *60011*

HR Department ID

Every Position resides in a 6-digit HR DeptID number: the first four digits identify the department, while the last two digits, called "nodes," are used to organize a department into groupings for system security and reporting purposes.

One department may have multiple HR DeptIDs, all of which begin with the same first four digits. The last two digits indicate:

- xxxx00 – The "base" or default department number
- xxxx05-13, xxxx80-89, xxxx91 – Indicates positions funded by a shared department or center
- xxxx55 – Qatar employees
- xxxx90 – Deans
- xxxx92 – Veterans Administration appointments *(Feinberg only)*
- xxxx93 – Graduate Students funded by individual departments/schools
- xxxx94 – Health Service Clinicians *(Feinberg only)*
- xxxx95 – Northwestern Medical Group (NMG) appointments *(Feinberg only)*
- xxxx96 – Officers of Northwestern *(senior management)*
- xxxx97 – Emeritus faculty
- xxxx98 – Work-study student employees
- xxxx99 – Graduate Students funded by The Graduate School

Schools or departments may request additional nodes for internal use: for example, a department may wish to use xxxx01 for adjunct faculty positions and xxxx02 for temporary employees.

Position Type and Category

The Position Type and Position Category codes specify details about the type of Position:

Position Type		Position Category	
FAC	Faculty	ADF	Administrative Faculty
FAC	Faculty	ADJ	Adjunct
FAC	Faculty	CLA	Clinical Assoc/Faculty Assoc
FAC	Faculty	CNT	Contributed Services
FAC	Faculty	COT	Coterminous
FAC	Faculty	EME	Emeritus
FAC	Faculty	END	Named Professorship
FAC	Faculty	HSC	Health Service Clinician
FAC	Faculty	LIB	Librarian
FAC	Faculty	NMF	NMFF
FAC	Faculty	REG	Regular
FAC	Faculty	RES	Research
FAC	Faculty	UNC	University College
FAC	Faculty	VIS	Visiting
NON	Non-Employee	ABF	American Bar Foundation
NON	Non-Employee	AFF	Affiliate
NON	Non-Employee	CHA	Chaplain Affiliate
NON	Non-Employee	COB	Cobra Dependent
NON	Non-Employee	IDP	Id Purposes, non-paid
NON	Non-Employee	IND	Indep Contractor
NON	Non-Employee	NMF	NMFF Member
NON	Non-Employee	NRO	NROTC staff
NON	Non-Employee	PDC	PostDoctorate
NON	Non-Employee	RET	Retiree
NON	Non-Employee	RPK	Research Park
NON	Non-Employee	TRN	Visiting Ungrd Stud- Training
NON	Non-Employee	TRU	Trustee
NON	Non-Employee	VSC	Visiting Scholar
NON	Non-Employee	VSS	Visiting Student
STF	Staff	EXM	Exempt
STF	Staff	NEX	Non-Exempt
STU	Student	GRA	Graduate Non Work Study
STU	Student	GWK	Graduate Work Study
STU	Student	SUM	Summer Session
STU	Student	UNG	Undergraduate Non Work Study
STU	Student	UWK	Undergraduate Work Study

Pay Group

The PAY GROUP is part of an individual's Appointment data and specifies how and when the employee is paid for a particular job record:

Pay Group	
BIR	Biweekly Regular
BIT	Biweekly temporaries
IND	Independent Contractors
LTD	Long Term Disability
MGW	Monthly Graduate Student Payment
MOF	Monthly Faculty Payment
MON	Monthly Staff Payment
NMF	Monthly NMG Payment
OTH	Other (Unpaid)
TRN	Used for Training for Students & POI

Payroll Status

The PAYROLL STATUS is also part of an individual's record and specifies that person's current pay status at the University:

Payroll Status	
A	Active
L	Unpaid Leave of Absence
P	Paid Leave of Absence
S	Suspended
T	Terminated

Section 2

Using myHR Administration

SIGNING IN TO MYHR

Browser Compatibility

myHR is certified compatible with the following browser versions

- Chrome: 43+ (desktop), Android 5.0+ (mobile)
- Firefox: 42+
- Internet Explorer: 11+
- Safari: 8+ (desktop and mobile)

At this time, the Microsoft Edge browser is *not* supported.

myHR Databases

Administrators for myHR can access data via two separate logins:

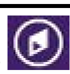
myHR: The regular myHR login link provides access to real-time information; this login is almost always used, and certainly must be used anytime you which to enter data in the system.

myHR Reporting: The Reporting database is an exact copy of myHR taken the night before. Reporting is intended specifically for users who create or run Query reports from myHR data. Reporting is also available as a backup option for looking up data, in the event that Production is unavailable.

Logging in to myHR

1.	Open your browser and navigate to: www.northwestern.edu/myhr.
2.	Click the "myHR Login" button. (Or select "myHR Reporting Login" for query access to the Reporting database.)
3.	Log in with your Northwestern-assigned NetID and Password.
4.	Click "Log In."

Accessing HR Administration Pages

5.	Click the  button in the top right corner.
6.	Click "Classic Home."

From here, use the **Main Menu** in the top left corner and follow the menu paths included in this guide and other myHR Admin documents.

MANAGING YOUR FAVORITES

myHR provides an easy way to manage your most recently and most often used pages through the "Favorites" menu, allowing for quick and easy navigation within the system.

Viewing the Favorites Menu

The Favorites menu is available from any page within myHR by clicking the button in the top right corner. Then select one of two options:

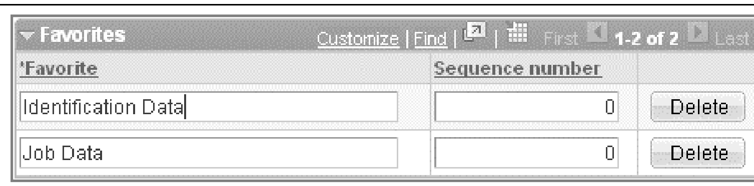
Recent Places: This section tracks the last five places you visited, providing easy access to move back and forth between a few different pages.

My Favorites: Add and edit your own favorite pages to this section (see below).

Adding a Favorite Page

1.	Navigate to the myHR page you wish to save as a favorite.
2.	Click the button and select "Add to Favorites."
3.	Enter a **DESCRIPTION** for the page as you want it to appear in your Favorites list. The official myHR page name will default. 
4.	Click OK.
5.	A confirmation message will appear that your favorite has been saved. Click OK.  *Note*: Once added, your favorites can be accessed using the menu button as described in Step 2 *or* from the Main Menu drop-down in the Classic Home view.

Editing, Reordering, and Deleting Your Favorites

1.	Open the **FAVORITES** menu as described above and click **EDIT FAVORITES**.
2.	**Edit the names** of any of your Favorite pages as necessary.  **To change the order** in which the pages appear on your Favorites menu, modify the "Sequence Numbers" accordingly. Pages will be sorted by increasing numerical value, beginning with 0. Pages that have the same numerical value will be sub-sorted alphabetically. **To remove a page** from your favorites, click Delete.
3.	Click Save. *Note:* Any new page you save to your Favorites after sorting is assigned a "Sequence Number" of zero, placing it by default at the top of your list.

Section 3

Appointment & Salary Overview Pages

Appointment Overview

Summary

Appointment Overview provides a snapshot of all of an individual's appointments at Northwestern, combining the most relevant information from numerous other myHR pages, such as Job Data, Position Data, and Personal Data.

Navigation

Faculty and Staff Information > Appointment Overview

Data Availability and Security Access

This page operates slightly differently than most myHR Admin pages. Specifically:

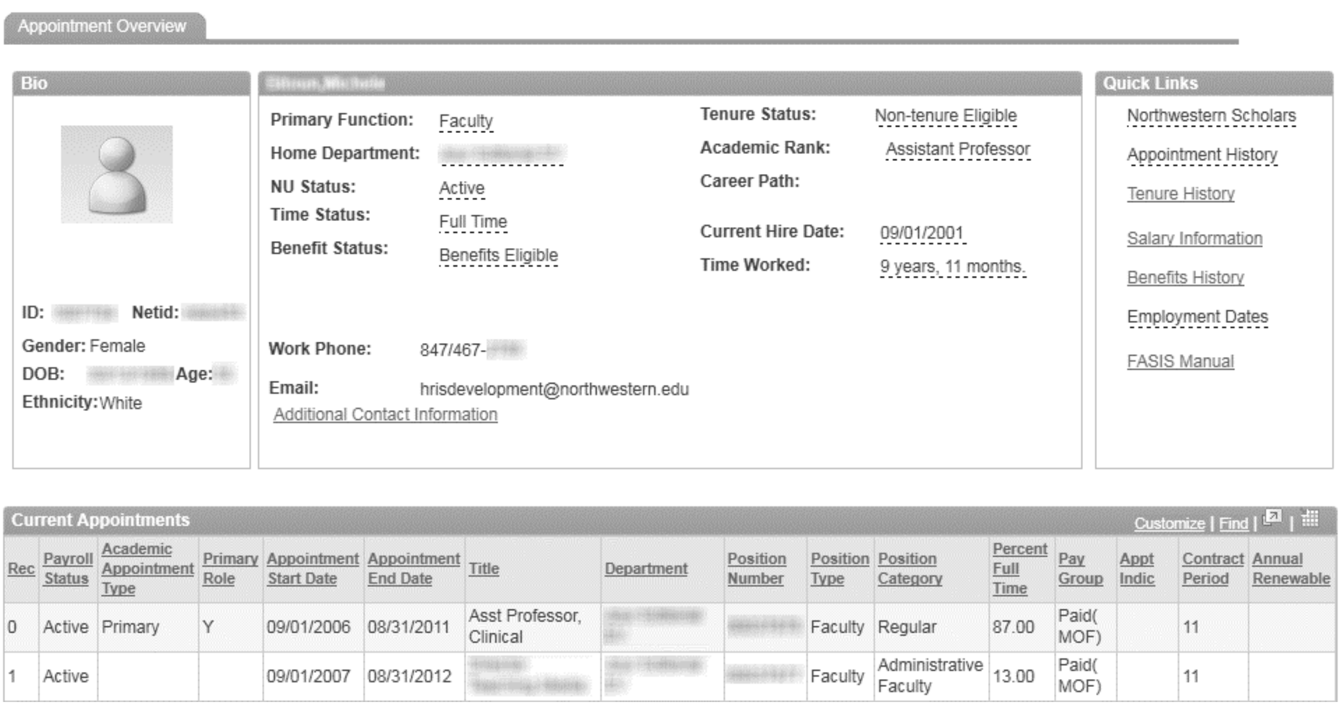
Included Employees: You may search for any active and terminated Faculty, Staff, and Non-Employee record. Temps, Grad Students, Trustees, NMG Administrators, Cobra Dependents, and Retiree Spouses *will not appear;* use the Job Data page for those employees.

Security Access: Any user with department access to at least *one* of an individual's appointments (Faculty, Staff, or Non-Employee) will be able to see information for *all* of that person's appointments across Northwestern.

Data Availability: Data on this page is *not* real-time; it updates each evening. For real-time information, use the Job Data page.

Page Detail

The top section contains an overview of the employee's employment at Northwestern; the bottom grid contains a list of all current appointment details.



Additional Information

- **Terminated Employees** will be shown with their Termination Date, Title at Termination, and Termination Reason. Current Appointment information is not available for terminated individuals; see Appointment History or Job Data for historical information.
- If **Future Dated Information** is entered on Job Data for this individual, the message “Future Appointment Transactions” will appear above the Current Appointment grid.
- The Header, Quick Links, and Current Appointments boxes will offer additional information for faculty or staff employees. If the individual has a combination of faculty and staff appointments, the faculty-specific data will display.

APPOINTMENT HISTORY

Summary

Appointment History displays historical employment transactions for a quick view of an employee's chronological job history at Northwestern.

Navigation

FACULTY AND STAFF INFORMATION > APPOINTMENT HISTORY

Data Availability and Security Access

This page operates slightly differently than most myHR Admin pages. Specifically:

Included Employees: You may search for any active and terminated Faculty, Staff, and Non-Employee record. Temps, Grad Students, Trustees, NMG Administrators, Cobra Dependents, and Retiree Spouses *will not appear;* use the Job Data page for those employees. Employees who terminated from Northwestern prior to September 2011 may not be viewable or may not display complete information on this page.

Security Access: Any user with department access to at least *one* of an individual's appointments (Faculty, Staff, or Non-Employee) will be able to see information for *all* of that person's appointments across Northwestern.

Data Availability: Data on this page is *not* real-time; it updates each evening. For real-time information, use the Job Data page.

Page Detail

The **top section** of Appointment History contains overview information and Quick Links identical to those of the Appointment Overview page (see the previous section).

The **bottom grid** contains historical transactions for an individual's employment record(s), sorted first by Job Record # and then in reverse chronological order:

Appointment History — Customize | Find | First 1-6 of 6 Last

Appointment Info | Additional Info

Effective Date	Rec	Payroll Status	Transaction Description	Academic Appointment Type	Primary Role	Appointment Start Date	Appointment End Date	Actual Appointment End Date	Job Title	Department	Percent Full Time	Pay Group
09/01/2010	0	Active	Promotion, Tenure Award	Primary	Y	09/01/2010			Assoc Professor	[illegible]	50.00	Paid (MOF)
09/01/2009	0	Active	Reappointment	Primary	Y	09/01/2009	08/31/2012		Asst Professor	[illegible]	50.00	Paid (MOF)
09/01/2006	0	Active	New Hire, Tenure Clock Start	Primary	Y	09/01/2006	08/31/2009		Asst Professor	[illegible]	50.00	Paid (MON)
09/01/2010	1	Active	Promotion, Reappointment	Joint		09/01/2010			Assoc Professor	[illegible]	50.00	Paid (MOF)
09/01/2009	1	Active	Reappointment			09/01/2009	08/31/2012		Asst Professor	[illegible]	50.00	Paid (MOF)
09/01/2006	1	Active	New Additional Appointment			09/01/2006	08/31/2009		Asst Professor	[illegible]	50.00	Paid (MON)

In addition to the information noted in the Definitions section of this manual, this History page contains the following unique fields:

- **TRANSACTION DESCRIPTION:** The type of transaction that occurred; if two transactions occurred on the same day, they may be combined for easier viewing.
- **ACTUAL APPOINTMENT END DATE:** If the appointment had an existing Appointment End Date, but was ended early, the actual end date will be listed.

Additional Information

- **Leave** and **Tenure** transactions are included in the Appointment History.
- **Additional Info (tab):** Click the "Additional Info" tab at the top of the grid for other information, such as Position Number, Position Type/Category, and Contract Period.
- This page will not contain *every* transaction seen on Job Data, but those that have been identified as pertinent to an employee's history. To see all transactions, use the Job Data or Position Data pages.
- The Header, Quick Links, and Current Appointments boxes will offer additional information for faculty or staff employees. If the individual has a combination of faculty and staff appointments, the faculty-specific data will display.

CURRENT SALARY

Summary

Current Salary displays the most recent salary-related information for each of an employee's appointments.

Navigation

FACULTY AND STAFF INFORMATION > CURRENT SALARY

Data Availability and Security Access

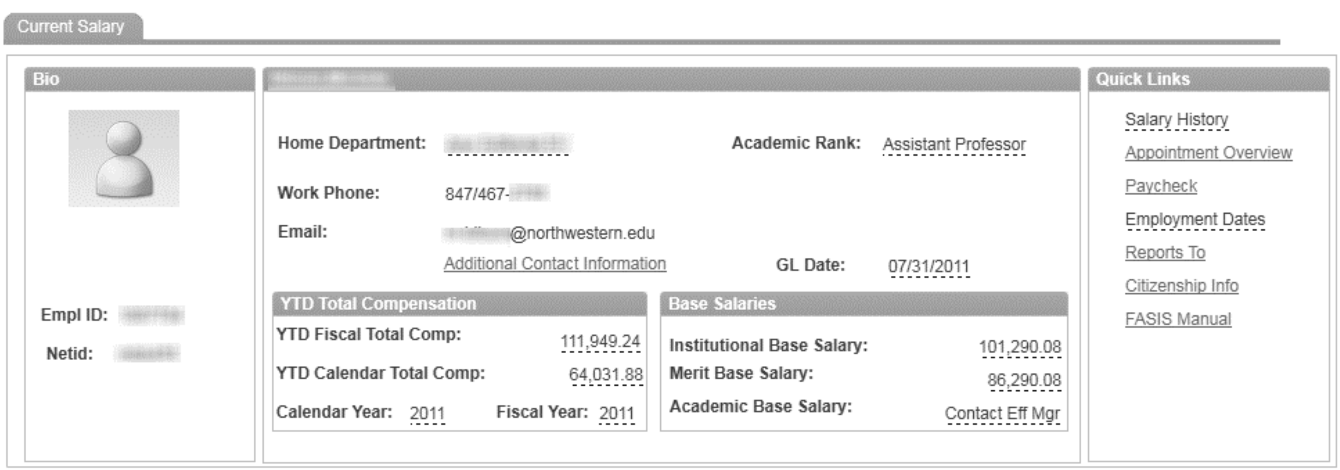
This page operates slightly differently than most myHR Admin pages. Specifically:

Included Employees: To be visible on this page, an employee must have had at least one active appointment in a *paid* pay group (MON, MOF, BIR, NMF) at some time during the current fiscal year. Details are provided for all active Faculty, Staff, and Non-Employees (excluding Temps, Grad Students, Trustees, NMG Administrators, Cobra Dependents, and Retiree Spouses). Terminated employees will *not* show on this page.

Security Access: Any user with access to one appointment that has been paid (pay group MON, MOF, NMF, or BIR) at *any time* during the current fiscal year will see *all* Current Salary information for every appointment.

Data Availability: Data on this page is *not* real-time; it updates each evening. The YTD Fiscal/Calendar Total Compensation, Actuals+FY Enc, Pre-Enc, and FY Appt Salary fields are updated after each payroll for the employee (indicated by the GL Date in the top section); all other fields are updated nightly.

Page Detail



In addition to the information noted in the Definitions section of this manual, this top grid contains the following unique fields:

- **GL DATE:** The last date that a payroll was run for this individual, i.e. their last pay date. Most fields on this page are updated as of this date.
- **YTD FISCAL/CALENDAR TOTAL COMP:** Total paid fiscal or calendar year-to-date compensation for the individual, including appointment salaries, additional pay, overtime, and other cash earnings.

Current Salary Information

Salary Information | Position/Appt. Info

Rcd	Payroll Status	Job Title	Department	Paygroup	Sched Pay Pds	% Full Time	Comp Rate	Annual Rate	Ctrt Per	Monthly Contract Rate	Actuals + FY Enc	Pre-Enc	FY Appt Salary	Exclude Merit Base Salary
0	Active	[illegible]	[illegible]	Paid(MOF)	12.0	87.00	7,190.84	86,290.08	9	9,587.79	86,290.08		86,290.08	
1	Active	[illegible]	[illegible]	Paid(MOF)	12.0	13.00	1,250.00	15,000.00	11	1,363.64	15,000.00		15,000.00	Admin
		Totals				100.00	8,440.84	101,290.08		10,951.43	101,290.08		101,290.08	

In addition to the information noted in the Definitions section of this manual, the center grid contains the following unique fields:

- **ACTUALS + FY ENC:** The employee's FY year-to-date earnings *plus* encumbered funds for the rest of the FY (money currently funded on the Position Funding page).
- **PRE-ENC:** Funds that are currently not encumbered for the fiscal year (not yet set up on the Position Funding page).
- **FY APPT SALARY:** The total of **Actuals + FY Enc** and **Pre-Enc**. For early start faculty (with a Scheduled Pay Period greater than 12), this number will also include pay for the early start months.

Funding Detail — 1-2 of 2

Rcd#	Position	Fund	FN Dept	Project/Grant	Activity	Program	Chartfield 1	Account	Percent	Start Date	Stop Date
0	[illegible]	110	[illegible]					60011	100.0000	12/01/2006	08/31/2012
1	[illegible]	110	[illegible]					60060	100.0000	09/01/2004	08/31/2012

The bottom section of the Current Salary page contains details about the chartstring/grant funding that was used to pay the employee *as of the last payroll.* For more details on funding, see **Position Funding—Not Deployed**.

Additional Information

- **Actuals+FY Enc**, **Pre-Enc**, and **FY Appt Salary** encumber to the end of the fiscal year for all accounts (unlike the Payroll Reports in VISTA and Cognos, which encumbers grant accounts through the grant's stop date).
- Click the **Position/Appt. Info** tab to view Appointment Start and End Dates; Position Number, Type, and Category; Position Budgeted Salary; and Annual Benefits Base Rate.
- The FY Appt Salary may differ from the Annual Rate or Institutional Base Salary. This can happen if the individual received a mid-year pay change, or if a biweekly employee works more or less than their scheduled hours.
- **Terminated Employees** will be shown only if they have been paid in the current fiscal year. See Salary History or Job Data for terminated employees' historical pay.
- The Base Salaries box will not be shown for adjunct faculty or terminated employees.
- An individual on a phased retirement plan will be indicated by a "Phased Retirement" note in the Header section.

Salary History

Summary

Salary History displays a historical overview of all salary-related transactions during an individual's tenure at Northwestern.

Navigation

Faculty and Staff Information > Salary History

Data Availability and Security Access

This page operates slightly differently than most myHR Admin pages. Specifically:

Included Employees: To be visible on this page, an employee must have had at least one active appointment in a *paid* pay group (MON, MOF, BIR, NMF) at some time during the current fiscal year. Details are provided for all active Faculty, Staff, and Non-Employees (excluding Temps, Grad Students, Trustees, NMG Administrators, Cobra Dependents, and Retiree Spouses). Terminated employees will *not* show on this page.

Security Access: Any user with access to one appointment that has been paid (pay group MON, MOF, NMF, or BIR) at *any time* during the current fiscal year will see *all* Current Salary information for every appointment.

Data Availability: Data on this page is *not* real-time; it updates each evening. The YTD Fiscal/Calendar Total Compensation, Actuals+FY Enc, Pre-Enc, and FY Appt Salary fields are updated after each payroll for the employee (indicated by the GL Date in the top section); all other fields are updated nightly.

Page Detail

The top section of the Salary History contains overview information and Quick Links identical to those of the Current Salary page. For details about those data, see the preceding section.

The bottom section of the Salary History contains salary details for each of the employee's paid appointments, sorted first by Job Record and then by Effective Date:

Customize | Find | View 4 | First 1-10 of 10 Last

Salary Information | Position/Appt Info

Empl Rec	Effective Date	Salary Transaction	Appointment Transaction	Payroll Status	Job Title	Department	Pay Group	Sched Pay Pds	% Full Time	Comp Rate	Annual Rate	Contract Period	Monthly Contract Rate
0	09/01/2011	Merit Increase		Active	Assoc Professor	[illegible]	MOF	12.0	50.00	4,418.45	53,021.40	9	5,891.27
0	09/01/2010	Merit Increase	Promotion, Tenure Award	Active	Assoc Professor	[illegible]	MOF	12.0	50.00	4,168.35	50,020.20	9	5,557.80
0	09/01/2009	Merit Increase	Reappointment	Active	Asst Professor	[illegible]	MOF		50.00	3,675.79	44,109.48	9	4,901.05
0	09/01/2008	Merit Increase		Active	Asst Professor	[illegible]	MOF		50.00	3,596.66	43,159.92	9	4,795.55
0	09/01/2007	Merit Increase		Active	Asst Professor	[illegible]	MOF		50.00	3,458.33	41,499.96	9	4,611.11

In addition to the information noted in the Definitions section of this manual, this History page contains the following unique fields:

- **Salary Transaction:** The type of salary-related transaction that occurred; only changes that directly impacted the individual's compensation will be included.
- **Appointment Transaction:** If the Salary Transaction was part of a larger appointment transaction (such as a Merit Increase due to a Promotion), the related Appointment Transaction will be displayed.

Section 4

Position Pages

POSITION DATA

Summary

Position Data maintains current, future, and historical position information. Any modification that has been made to a position can be viewed here.

Position Data also identifies if a position is filled or vacant, whether it is 1-to-1 or 1-to-Many, and, if filled, who the current incumbent(s) are.

Navigation

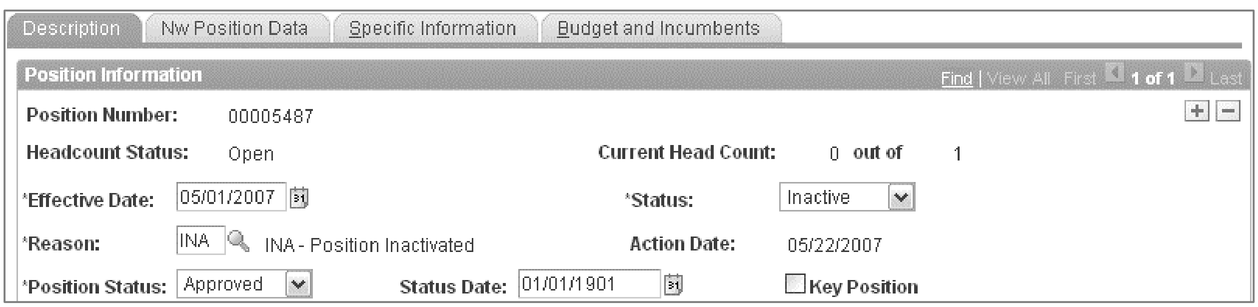
ORGANIZATIONAL DEVELOPMENT > POSITION MANAGEMENT > ADD/MAINTATIN POSITIONS > POSITION DATA

Page Detail

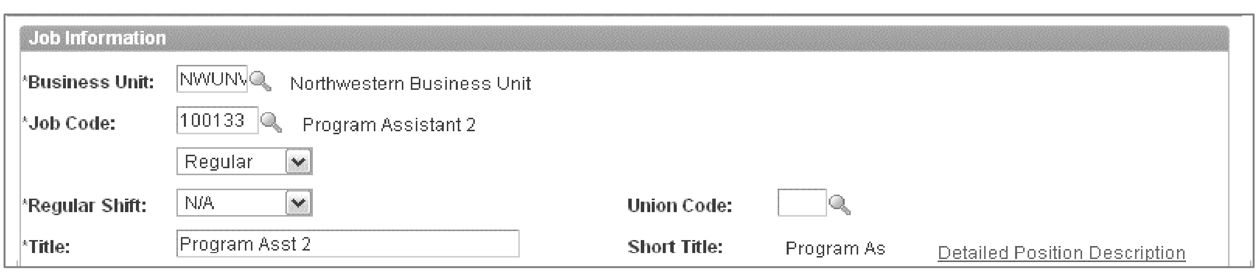
Data is organized into four tabs on the Position Data page:

- **Description** – an overview of position information
- **Nw Position Data** – a wide array of more specific detail
- **Specific Information** – *this tab is not currently used and will be empty*
- **Budget and Incumbents** – basic information for any current incumbent (individuals who currently hold this position)

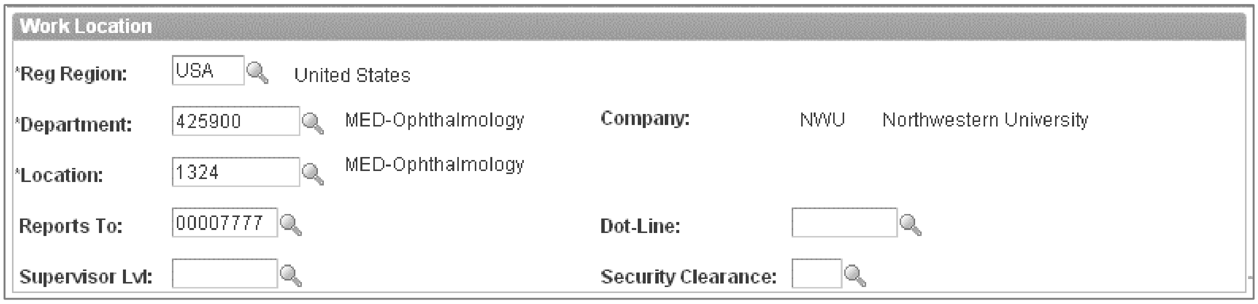
The **Description** tab indicates status details about the position, including the latest change that was made (“Reason”), when that change was made (“Effective Date”), and more:



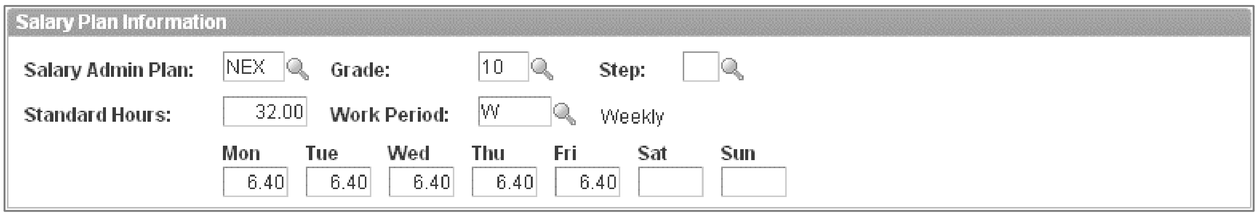
- **HEADCOUNT STATUS:** Notes if the position is currently Filled or Open.
- **CURRENT HEAD COUNT:** The number of employees currently in the position and the maximum number allowed in the position.



- **JOB CODE:** The six-digit Job Code that provides a template for this position, including the Title.
- **TITLE:** The Department Title for this position, shortened to 30 characters. This will default to the formal University Title, but may be updated if a department receives an approved Business Title.


Work Location
*Reg Region: USA United States
*Department: 425900 MED-Ophthalmology Company: NWU Northwestern University
*Location: 1324 MED-Ophthalmology
Reports To: 00007777 Dot-Line:
Supervisor Lvl: Security Clearance:

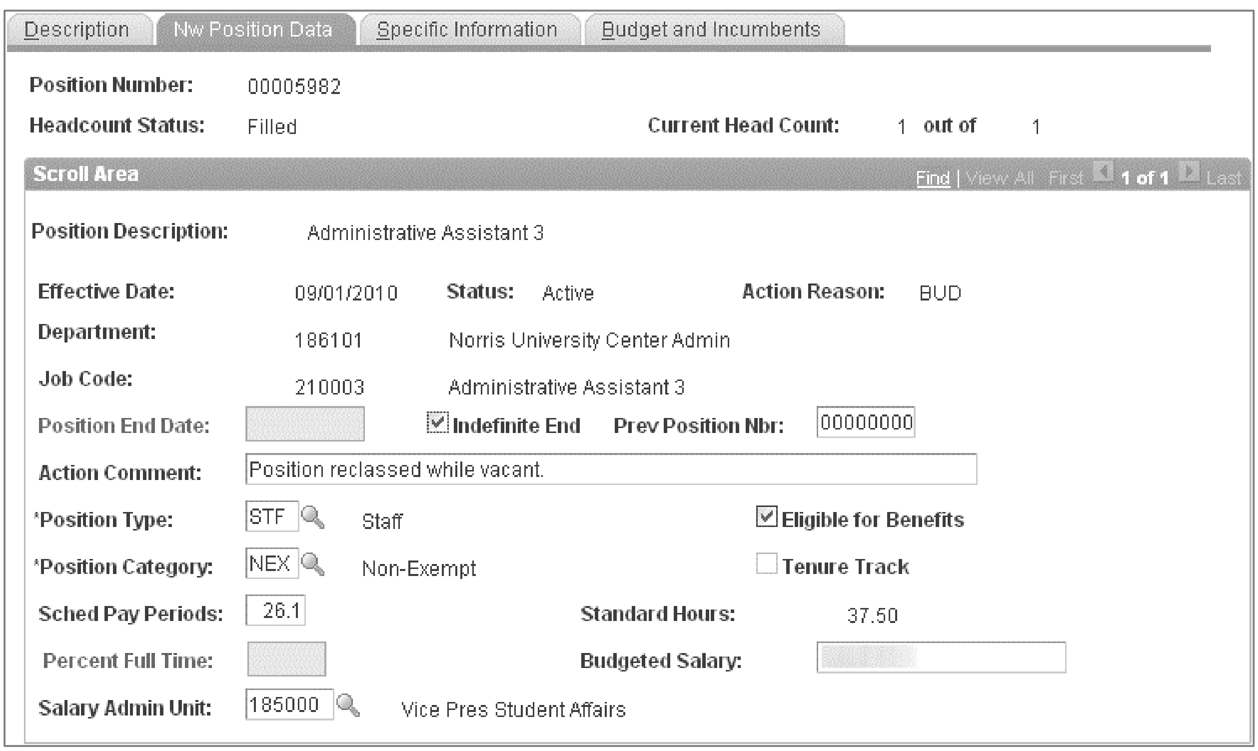
- **REPORTS TO:** This field on the Position Data page is *not* used or maintained in myHR or by the Office of Human Resources. Supervisors of employees are instead available on the **REPORTS TO** page in myHR.


Salary Plan Information
Salary Admin Plan: NEX Grade: 10 Step:
Standard Hours: 32.00 Work Period: W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
6.40	6.40	6.40	6.40	6.40		

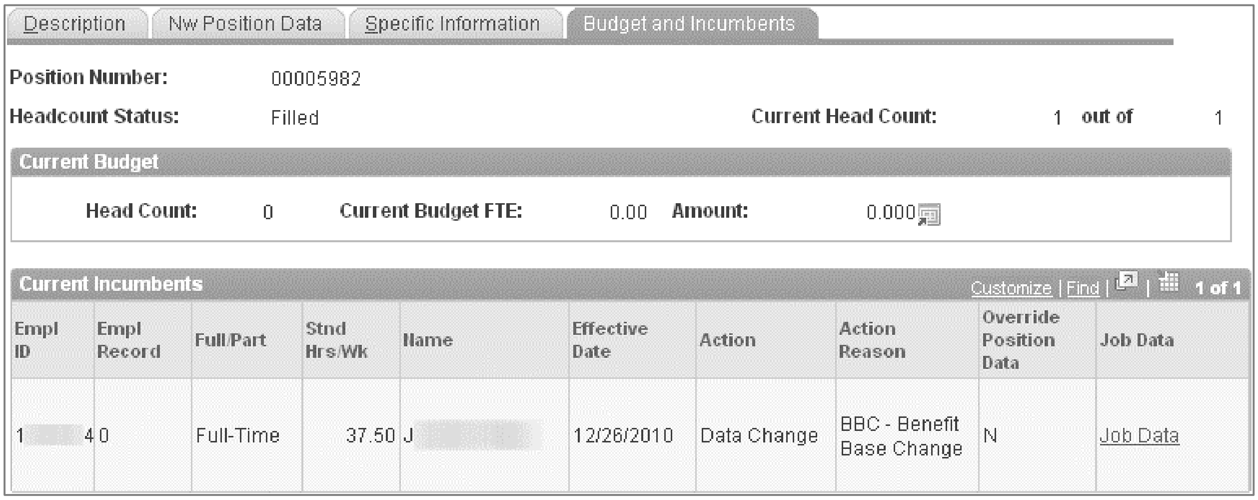
- For biweekly-paid, temporary employees, this section indicates the regularly-scheduled hours during a typical workweek.

The **Nw Position Data** tab indicates Northwestern-specific status details and codes related to the position:


Description | Nw Position Data | Specific Information | Budget and Incumbents
Position Number: 00005982
Headcount Status: Filled Current Head Count: 1 out of 1
Scroll Area Find | View All First 1 of 1 Last
Position Description: Administrative Assistant 3
Effective Date: 09/01/2010 Status: Active Action Reason: BUD
Department: 186101 Norris University Center Admin
Job Code: 210003 Administrative Assistant 3
Position End Date: Indefinite End Prev Position Nbr: 00000000
Action Comment: Position reclassed while vacant.
*Position Type: STF Staff Eligible for Benefits
*Position Category: NEX Non-Exempt Tenure Track
Sched Pay Periods: 26.1 Standard Hours: 37.50
Percent Full Time: Budgeted Salary:
Salary Admin Unit: 185000 Vice Pres Student Affairs

- **ELIGIBLE FOR BENEFITS:** this field is not used or maintained and does not necessary indicate benefits eligibility.

The **Budget and Incumbents** tab includes information relating to the employee(s) currently in this position:



- The **Current Budget** section is not used; these values always will be zero.
- To see the Job Data page for a current incumbent, click the <u>**Job Data**</u> link.

NU POSITION HISTORY

Summary

The Position History page provides a summary of all employees who have held the position in the past, including their start and end dates, beginning and ending salary, and reason for leaving the position.

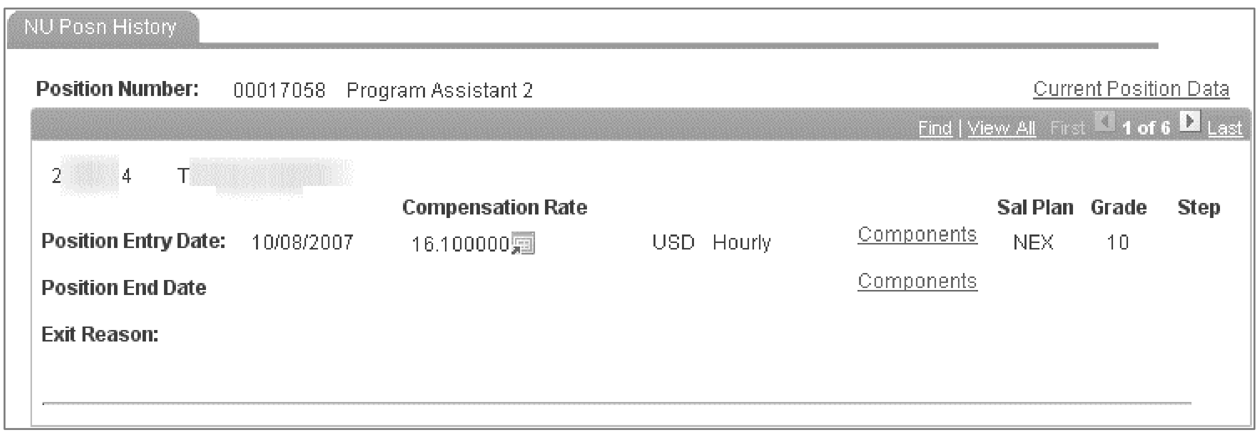
Navigation

ORGANIZATIONAL DEVELOPMENT > POSITION MANAGEMENT > REVIEW POSITION/BUDGET INFO > NU POSITION HISTORY

Page Detail

Basic information about the most recent employee to hold the position will be displayed, including the Position Entry Date (when the employee began in this position); and the corresponding Compensation Rate, Salary Plan, and Grade. **This information is a snapshot of when the employee began and may not reflect the employee's current compensation.**

When an employee leaves the position, the End Date will be included along with the employee's ending Compensation, Salary Plan, and Grade. An Exit Reason also will be provided.



While only the most recent employee is shown by default, the scroll arrows at the right of the blue bar can be used to scroll through all past employees.

POSITION FUNDING

Summary

Position Funding provides information about the funding accounts (chartstrings) used to pay employees in this position.

Navigation

<u>Regular myHR Data Lookup users:</u>
ORGANIZATIONAL DEVELOPMENT > POSITION MANAGEMENT > ADD/MAINTAIN POSITIONS > POSITION FUNDING--NOT DEPLOYED

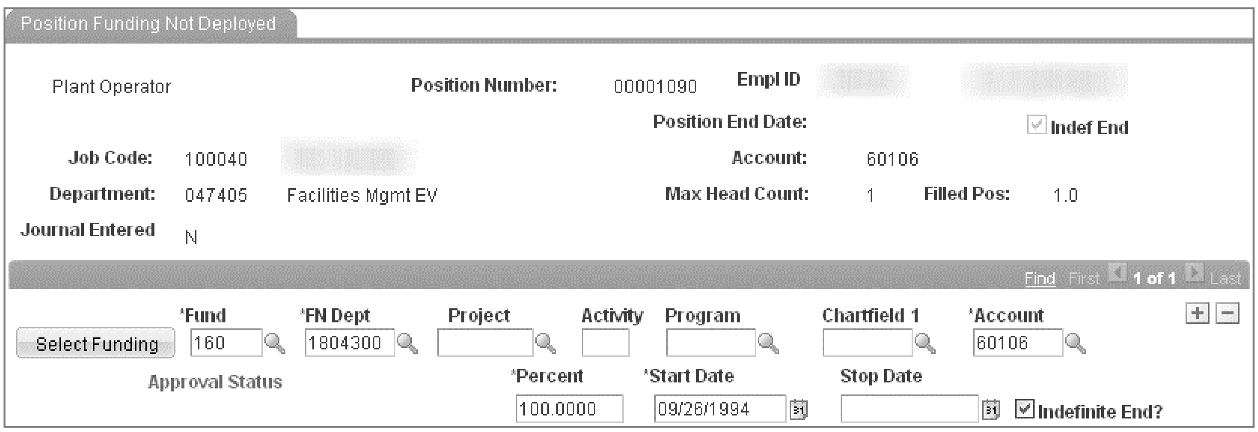
<u>Users with access to enter funding changes:</u>
ORGANIZATIONAL DEVELOPMENT > POSITION MANAGEMENT > ADD/MAINTAIN POSITIONS > POSITION FUNDING

Page Detail

The top section of the Position Funding page provides a summary of position and incumbent information.

The bottom grid displays line-by-line detail about each chartstring (past, present, and future) that has provided some portion of payroll funding for incumbents in this position, including the **Start Date** and **Stop Date**.

For more information, see the myHR Deployed Funding manual.



Vacant Budgeted Positions

Summary

The Vacant Budgeted Positions page will provide a listing of all active, vacant positions within a specific HR Department ID or by a six-digit Job Code.

Use this page to:

- Find available, vacant positions in your department when bringing on a new individual (instead of creating a new position).
- Review vacant positions on a regular basis; if a vacant position is not going to be used in the foreseeable future, it can be Inactivated via a Position/Appointment Form. Inactivating a position removes it from your department's Position Management reports and frees up funds that were previously allocated to the position. An Inactive position can be Reactivated at any time with another Position/Appointment Form.

Navigation

Organizational Development > Position Management > Review Position/Budget Info > Vacant Budgeted Positions

Page Detail

When entering the Vacant Budgeted Positions page, you will be prompted to search for an HR Department ID number or a 6-digit Job Code (if searching for a specific job title).

This page provides various Position details for vacant, active positions on two tabs: **Position Data** and **Job Data:**

Vacant Budgeted Positions

Set ID: NWUNV **Department:** 044500 Office of Human Resources **Total Vacant Positions:** 6

Data — Customize | Find | View All | First 1-6 of 6 Last

Position Data | Job Information | Work Location

Position	Description	Position Status	Reports To	Short Description	Vacant Positions	Max Head Count	Full/Part Time	Regular/Temporary
00007230	B	Approved	00043060	Pr	1	1	Full-Time	Regular
00008400	S	Approved	00043060	P	1	1	Full-Time	Regular
00016222	C	Approved	00011339		1	1	Full-Time	Regular
00023587	B	Approved	00043060	P	1	1	Full-Time	Regular
00041061	D	Approved	00009954	A	1	1	Full-Time	Regular
00042818	B	Approved	00016878	D	1	1	Full-Time	Regular

Data — Customize | Find | View All | First 1-6 of 6 Last

Position Data | Job Information | Work Location

Position	Job Code	Short Description	Manager Level	Job Function	Salary Administration Plan	Salary Grade	Step
00007230	101072	B		HUM	NEX	10	
00008400	100093	S		OAD	NEX	9	
00016222	101542	C		HUM	EXS	6	
00023587	104693	Br	Other	OAD	NEX	12	
00041061	100370	D	Non-Mgr	HUM	EXS	14	
00042818	104237	B	Other	ITT	ITS	78	

Section 5

Appointment / Job Pages

JOB DATA

Summary

The Job Data page contains complete current, historical, and future details regarding every type of individual's appointments, including salary and benefits information.

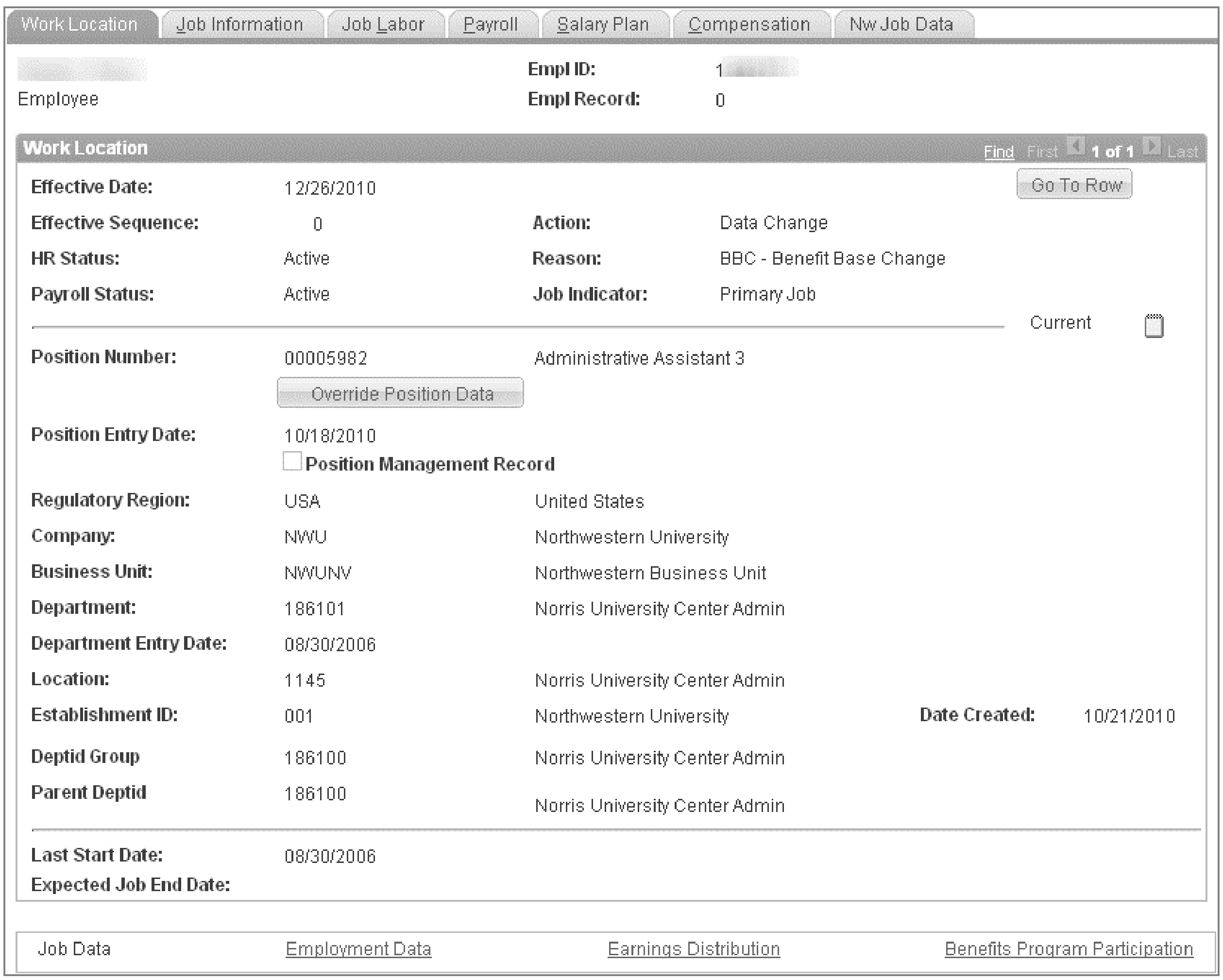
Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > JOB DATA

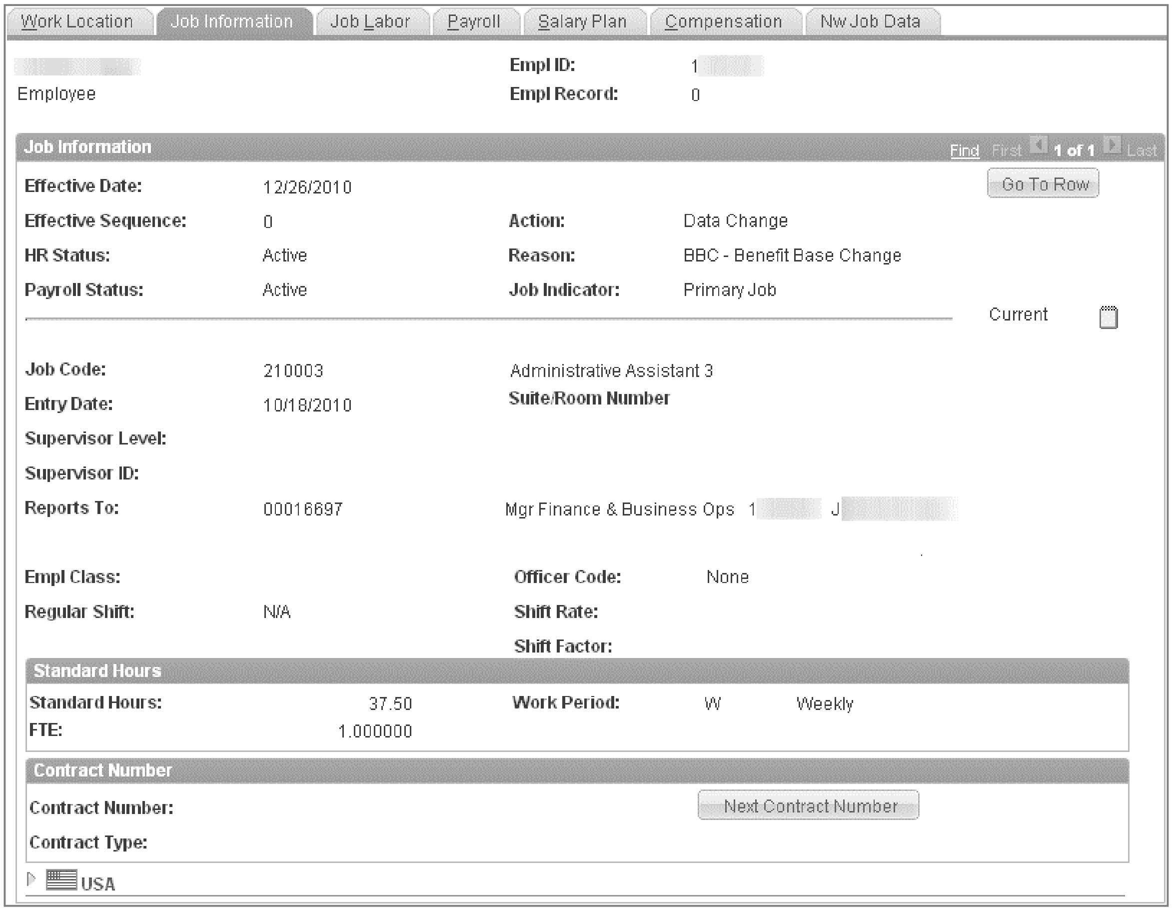
Page Detail

The Job Data page consists of multiple pieces of information accessible via tabs (at the top of the page) and hyperlinks (at the bottom of the page).

The **WORK LOCATION** tab contains basic information, such as the Position Number and Department associated with the job, and transactional information at the top of the screen (Action, Reason, and Effective Date):



The **JOB INFORMATION** tab contains some fields that are set on the related Position Data, and by default, apply to this job record. (Note that many fields on this page are not used.)



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | Nw Job Data

Employee

Empl ID: 1
Empl Record: 0

Job Information Find First 1 of 1 Last

Go To Row

Effective Date:	12/26/2010		
Effective Sequence:	0	Action:	Data Change
HR Status:	Active	Reason:	BBC - Benefit Base Change
Payroll Status:	Active	Job Indicator:	Primary Job

Current

Job Code:	210003	Administrative Assistant 3	
Entry Date:	10/18/2010	Suite/Room Number	
Supervisor Level:			
Supervisor ID:			
Reports To:	00016697	Mgr Finance & Business Ops 1 J	
Empl Class:		Officer Code:	None
Regular Shift:	N/A	Shift Rate:	
		Shift Factor:	

Standard Hours

Standard Hours:	37.50	Work Period:	W Weekly
FTE:	1.000000		

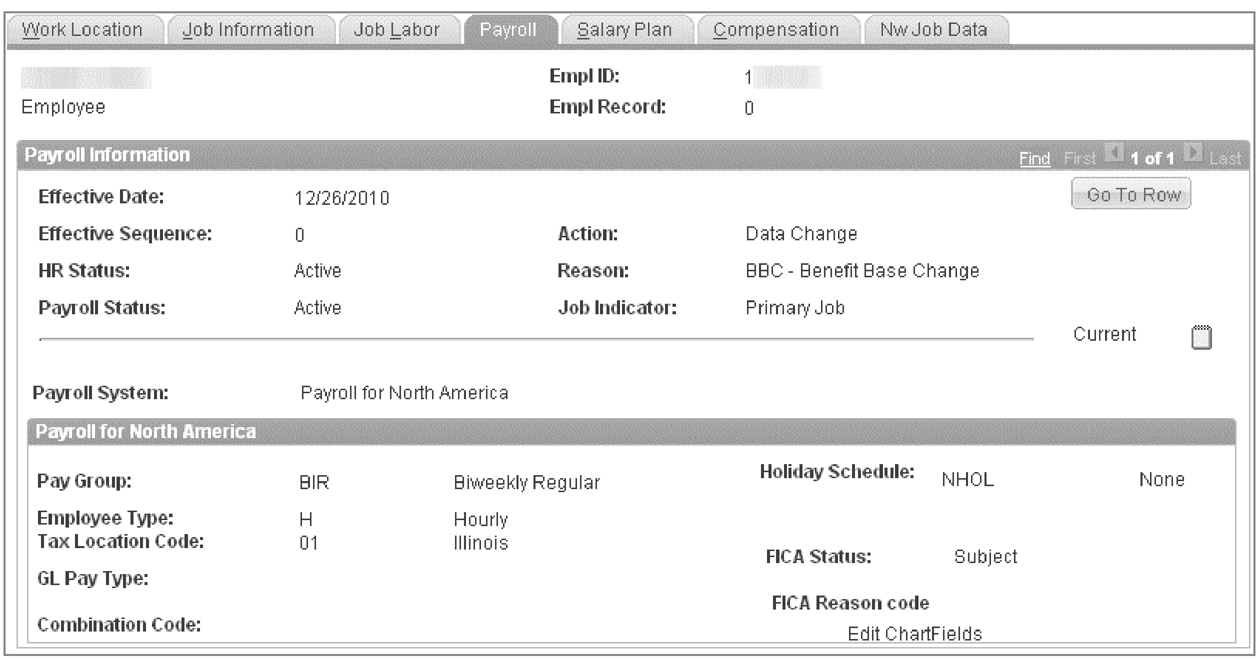
Contract Number

Contract Number:
Next Contract Number
Contract Type:

USA

The **JOB LABOR** tab is only used for union employees and will be blank for all other employees. For specific questions or concerns regarding union information, contact HR Operations or HR Compensation.

The **PAYROLL** tab contains non-salary information that is relevant to an employee's payroll processing:



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | Nw Job Data

Employee

Empl ID: 1
Empl Record: 0

Payroll Information Find First 1 of 1 Last

Go To Row

Effective Date:	12/26/2010		
Effective Sequence:	0	Action:	Data Change
HR Status:	Active	Reason:	BBC - Benefit Base Change
Payroll Status:	Active	Job Indicator:	Primary Job

Current

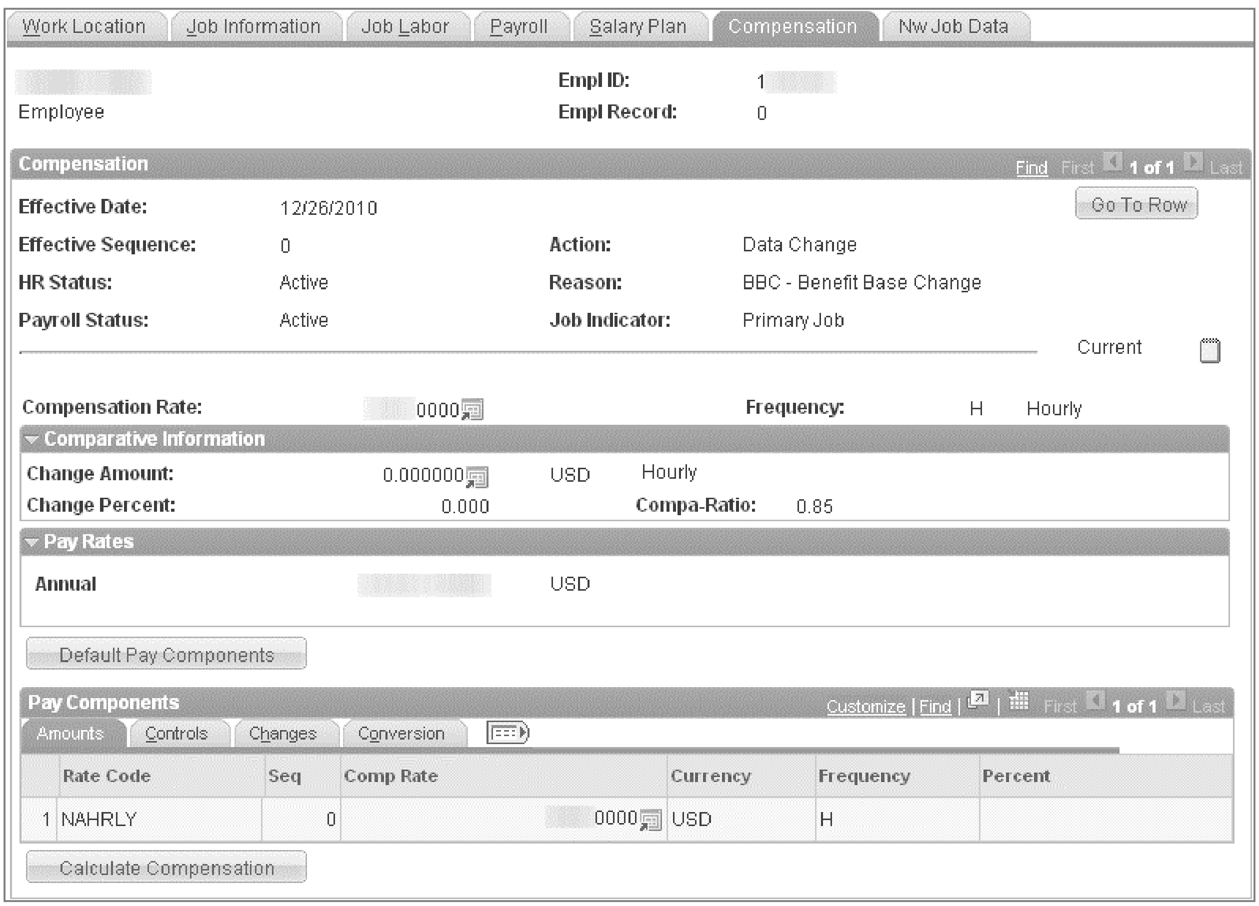
Payroll System: Payroll for North America

Payroll for North America

Pay Group:	BIR	Biweekly Regular	Holiday Schedule:	NHOL	None
Employee Type:	H	Hourly			
Tax Location Code:	01	Illinois	FICA Status:	Subject	
GL Pay Type:			FICA Reason code		
Combination Code:			Edit ChartFields		

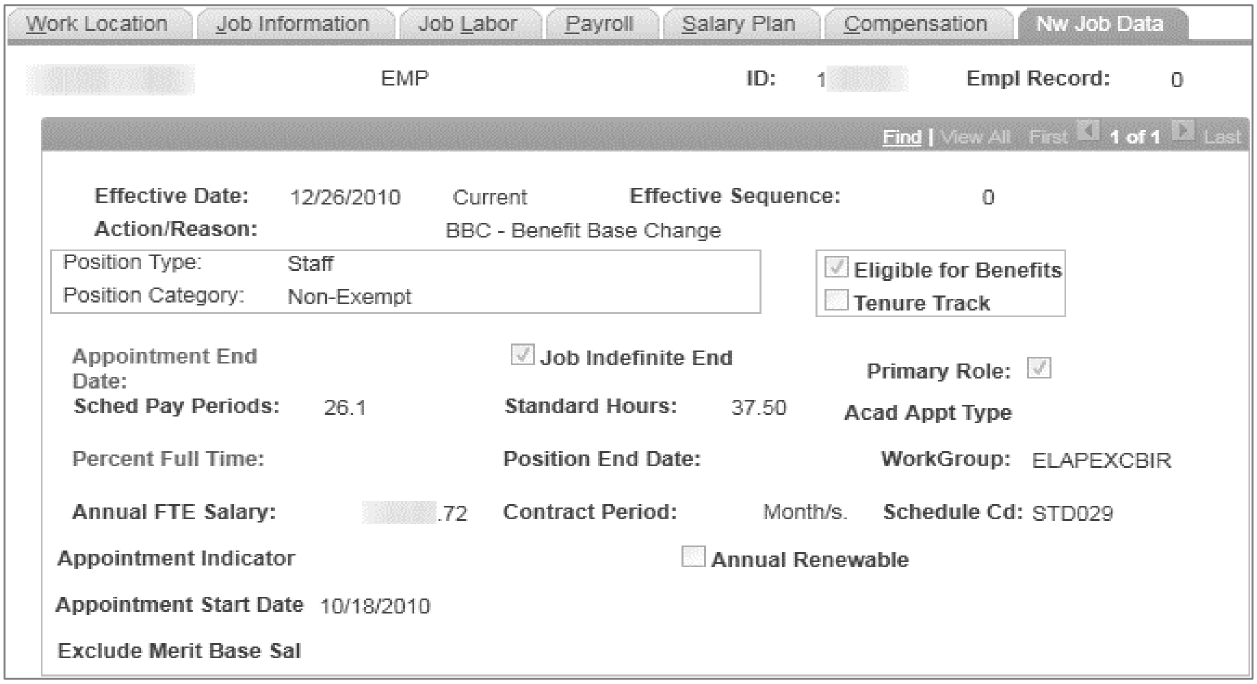
The **SALARY PLAN** tab indicates the Salary Admin Plan and salary Grade, based on the information set on the Position Data page:

The **COMPENSATION** tab contains salary details for the job (note that, like other tabs on Job Data, you can view historical salary data by clicking the scroll arrow in the top right corner of the grid).



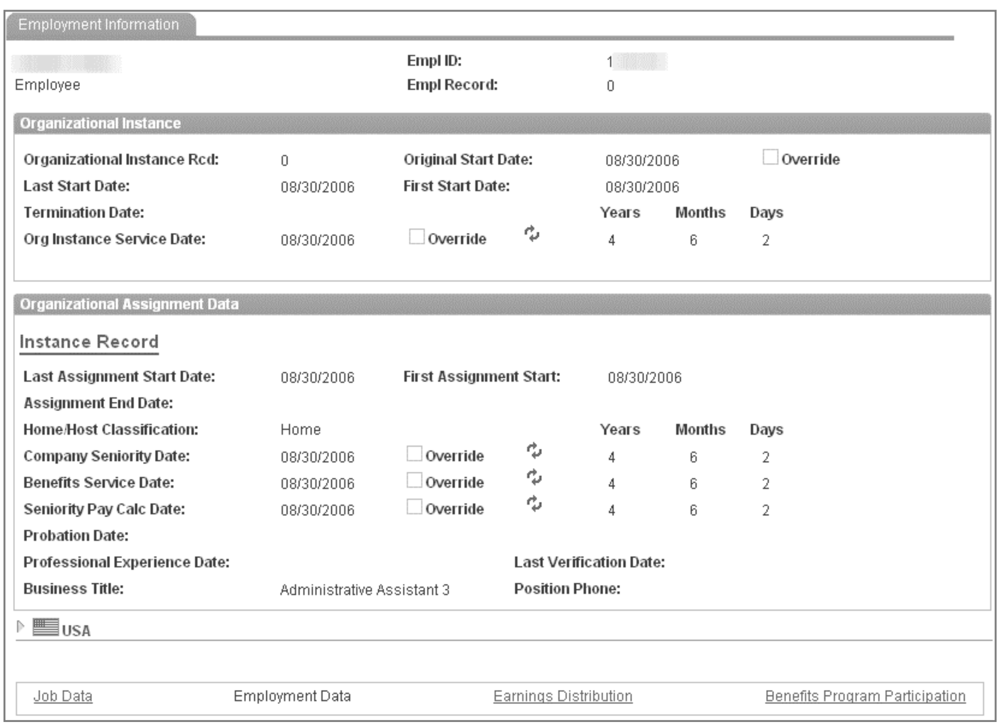
- The **Change Amount** and **Change Percent** fields will indicate by how much the salary changed, if you are looking at data that included a salary change over the previous information.

The **NW JOB DATA** tab provides a summary of Northwestern-specific job and appointment information:

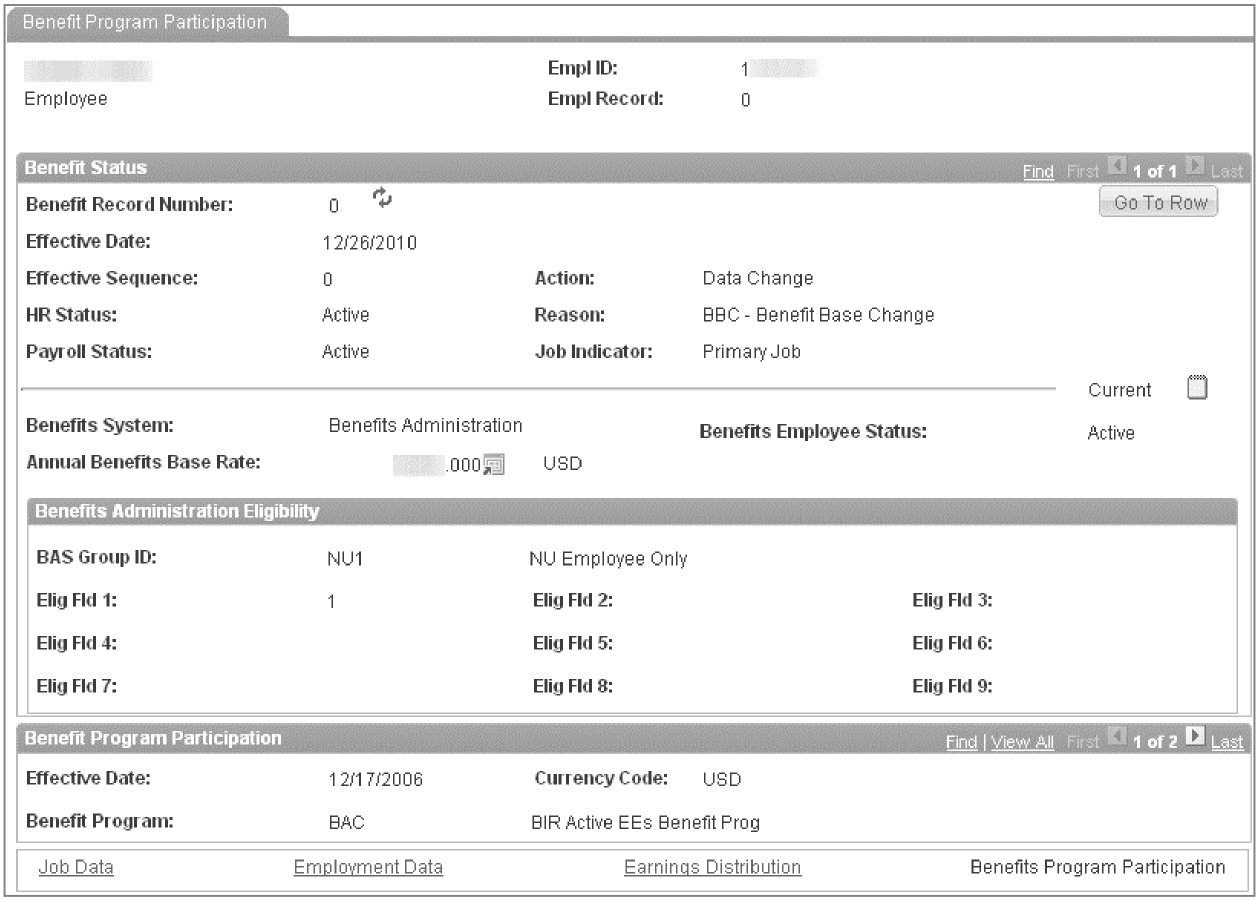


- **Eligible for Benefits** and **Tenure Track** are not used or maintained.
- **WorkGroup** and **Schedule Cd** are internal HR fields used to maintain staff and temporary employees' schedules in the timekeeping system.

The **EMPLOYMENT DATA** link at the bottom of the Job Data screen will provide date-related details on the employee's history with Northwestern:



Click the **BENEFITS PROGRAM PARTICIPATION** link at the bottom of the Job Data page displays benefits information, including the Annual Benefits Base Rate and the Benefit Program in which the employee is currently enrolled:



NORTHWESTERN JOB SUMMARY

Summary

The Northwestern Job Summary page contains basic, non-protected information about every appointment for employees across campus. Job Summary is the only page in myHR that is not limited by security access; you are allowed to see basic employment details for anyone at the University.

Use the Northwestern Job Summary page to:

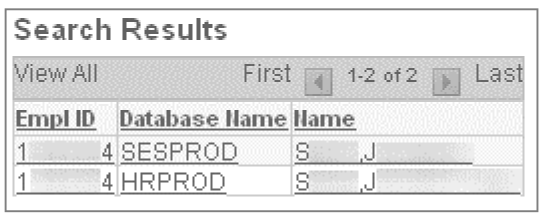
- Review basic details for employees that are not within your myHR security access.
- Determine if an individual has a previous HR or Student relationship with Northwestern
- Find the EmplID number for a student or employee by name.

Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > REVIEW JOB INFORMATION > NORTHWESTERN JOB SUMMARY

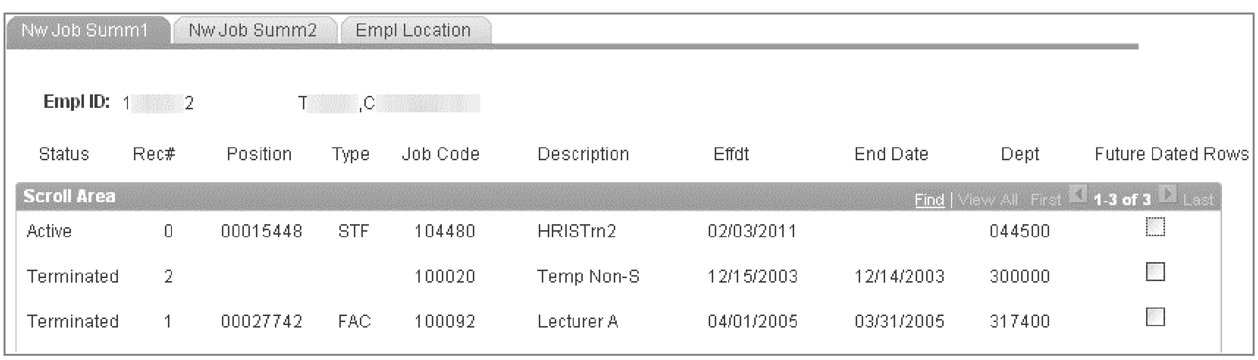
Page Detail

When searching for an employee on Northwestern Job Summary, two results may be returned, one with a Database Name of “SESPROD” and another with a database Name “HRPROD”:



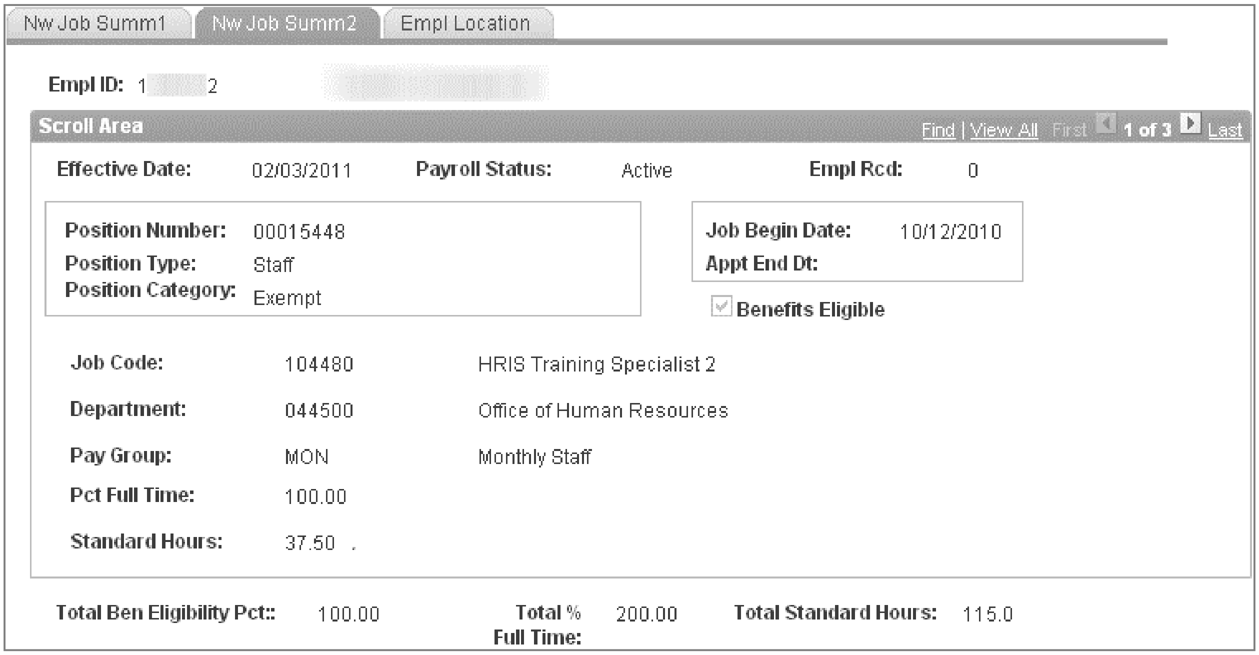
- To view HR information, click either link. If not available, the employee has no HR history at Northwestern.
- An “SESPROD” result indicates that the individual had a record – and ID number – in the student database. When hiring an employee for the first time, the Employee ID number associated with SESPROD should be used.

The **NW JOB SUMM1** tab contains a brief summary of all of the employee’s appointments on one page:



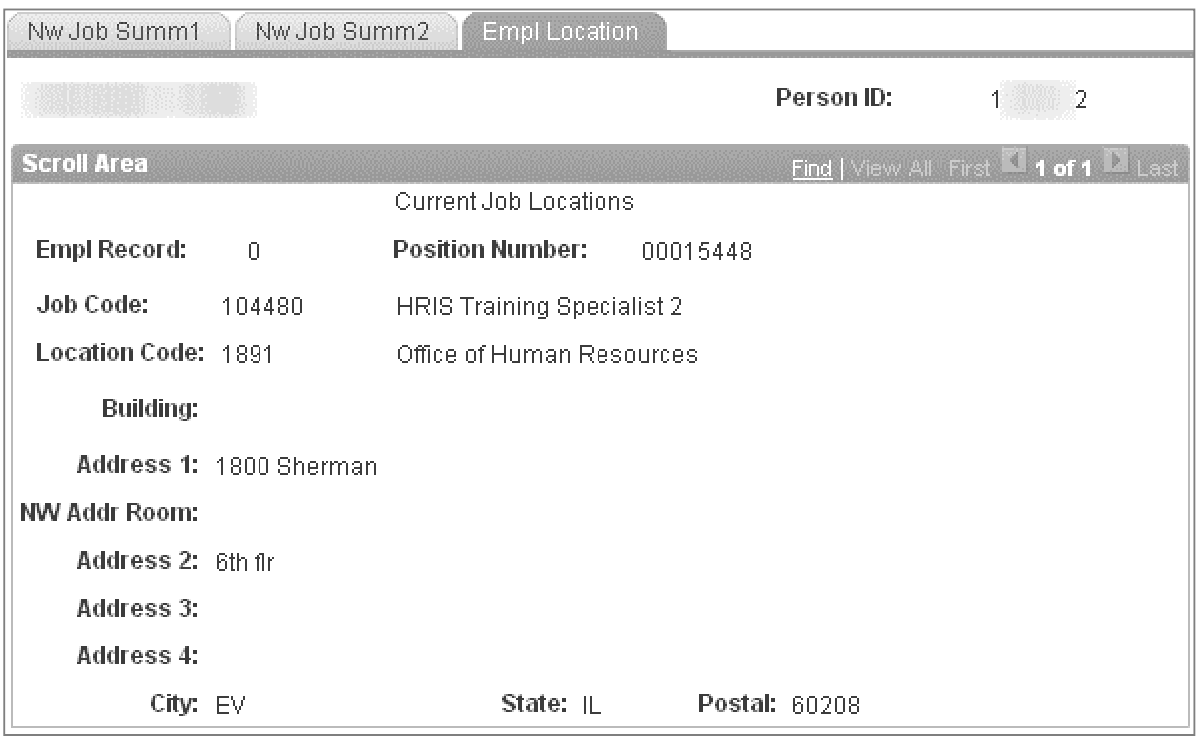
- The most recent information for all Job Records are summarized here. If there are future-dated changes pending for a record, the **Future Dated Rows** box will be checked.

The **Nw Job Summ2** tab contains more detailed information about each Job Record. Note that you will have to use the scroll arrow or "View All" to view all Job Records:



- **Job Begin Date:** The date the employee began in this particular job.

The **EMPL LOCATION** tab provides information on the physical location for each active job record:



Employment Info

Summary

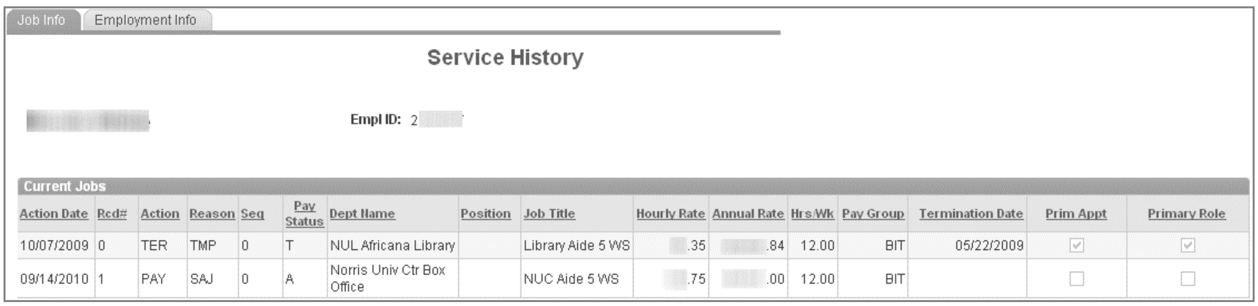
The Employment Info page presents an organized view of some of the most common job/appointment information.

Navigation

Workforce Administration > Job Information > Review Job Information > Employment Info

Page Detail

The **Job Info** tab contains a brief summary of all of the individual's job record on one page, including the most recent information for that record:


Job Info | Employment Info

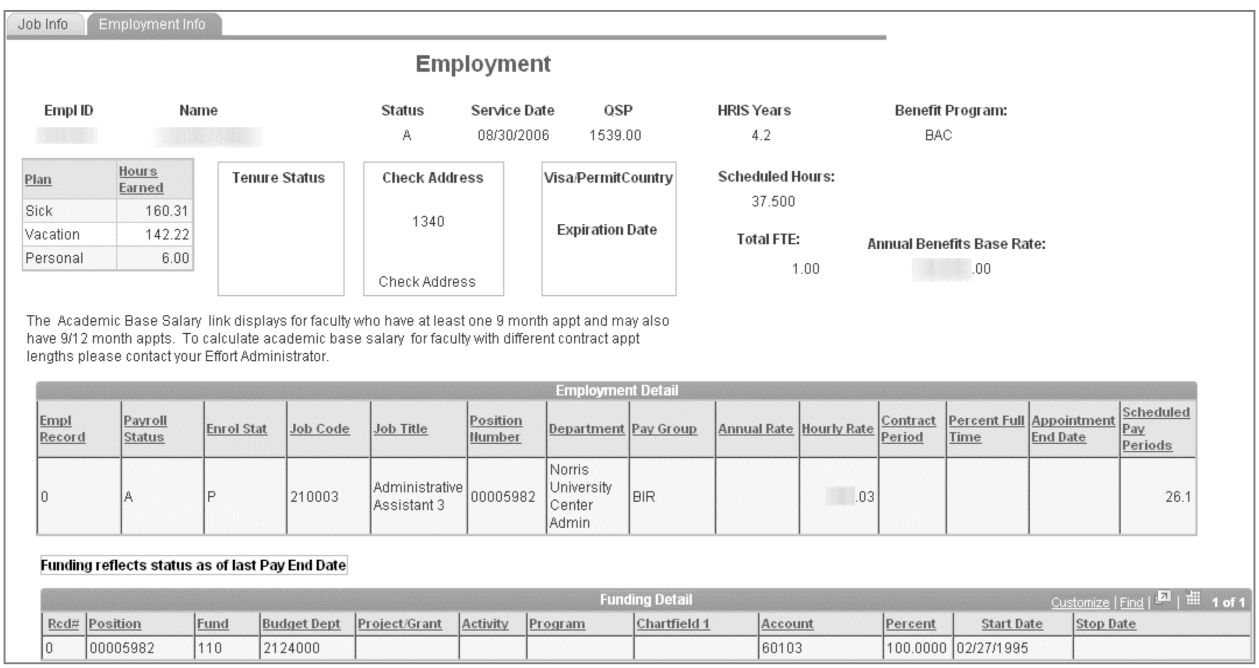
Service History

[redacted] Empl ID: 2[redacted]

Current Jobs

Action Date	Rcd#	Action	Reason	Seq	Pay Status	Dept Name	Position	Job Title	Hourly Rate	Annual Rate	Hrs/Wk	Pay Group	Termination Date	Prim Appt	Primary Role
10/07/2009	0	TER	TMP	0	T	NUL Africana Library		Library Aide 5 WS	[redacted].35	[redacted].84	12.00	BIT	05/22/2009	☑	☑
09/14/2010	1	PAY	SAJ	0	A	Norris Univ Ctr Box Office		NUC Aide 5 WS	[redacted].75	[redacted].00	12.00	BIT		☐	☐

The **Employment Info** tab presents additional details for each record, including service information, benefits data, Visa details, and more:


Job Info | Employment Info

Employment

Empl ID	Name	Status	Service Date	QSP	HRIS Years	Benefit Program:
[redacted]	[redacted]	A	08/30/2006	1539.00	4.2	BAC

Plan	Hours Earned
Sick	160.31
Vacation	142.22
Personal	6.00

Tenure Status

Check Address: 1340

Check Address

Visa/Permit Country

Expiration Date

Scheduled Hours: 37.500

Total FTE: 1.00

Annual Benefits Base Rate: [redacted].00

The Academic Base Salary link displays for faculty who have at least one 9 month appt and may also have 9/12 month appts. To calculate academic base salary for faculty with different contract appt lengths please contact your Effort Administrator.

Employment Detail

Empl Record	Payroll Status	Enrol Stat	Job Code	Job Title	Position Number	Department	Pay Group	Annual Rate	Hourly Rate	Contract Period	Percent Full Time	Appointment End Date	Scheduled Pay Periods
0	A	P	210003	Administrative Assistant 3	00005982	Norris University Center Admin	BIR		[redacted].03				26.1

Funding reflects status as of last Pay End Date

Funding Detail　Customize | Find | 1 of 1

Rcd#	Position	Fund	Budget Dept	Project/Grant	Activity	Program	Chartfield 1	Account	Percent	Start Date	Stop Date
0	00005982	110	2124000					60103	100.0000	02/27/1995	

FACULTY TENURE

Summary

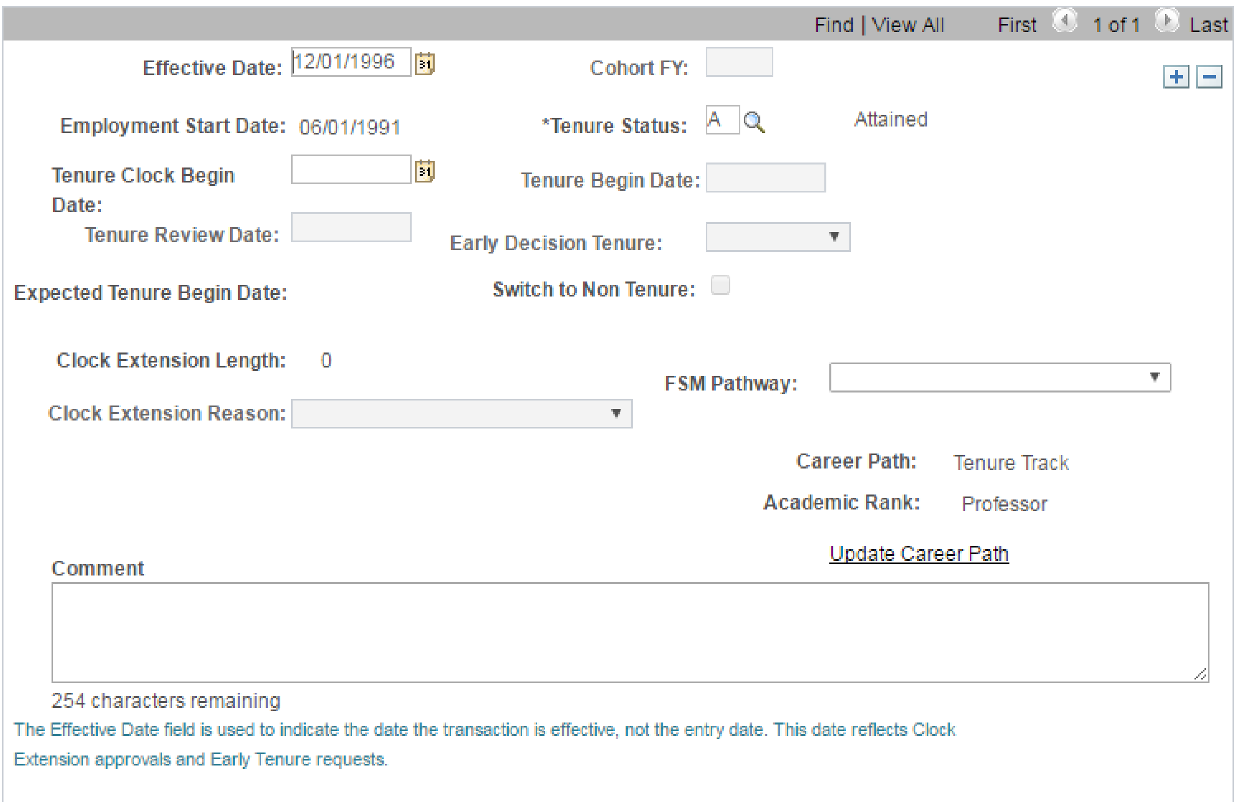
The Faculty Tenure page displays career path, rank, and tenure information for a faculty member.

Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > FACULTY INFORMATION > FACULTY TENURE

Page Detail

All tenure information and dates, as well as the Career Path and Academic Rank, is displayed:


Find | View All First 1 of 1 Last

Effective Date: 12/01/1996 Cohort FY:

Employment Start Date: 06/01/1991 *Tenure Status: A Attained

Tenure Clock Begin Date: Tenure Begin Date:

Tenure Review Date: Early Decision Tenure:

Expected Tenure Begin Date: Switch to Non Tenure:

Clock Extension Length: 0 FSM Pathway:

Clock Extension Reason:

Career Path: Tenure Track

Academic Rank: Professor

Update Career Path

Comment

254 characters remaining

The Effective Date field is used to indicate the date the transaction is effective, not the entry date. This date reflects Clock Extension approvals and Early Tenure requests.

Section 6

Personal Information Pages

PERSONAL DATA

Summary

Personal Data contains all personal information for an individual, including home and campus contact information, campus email, Northwestern NetID, and date of birth.

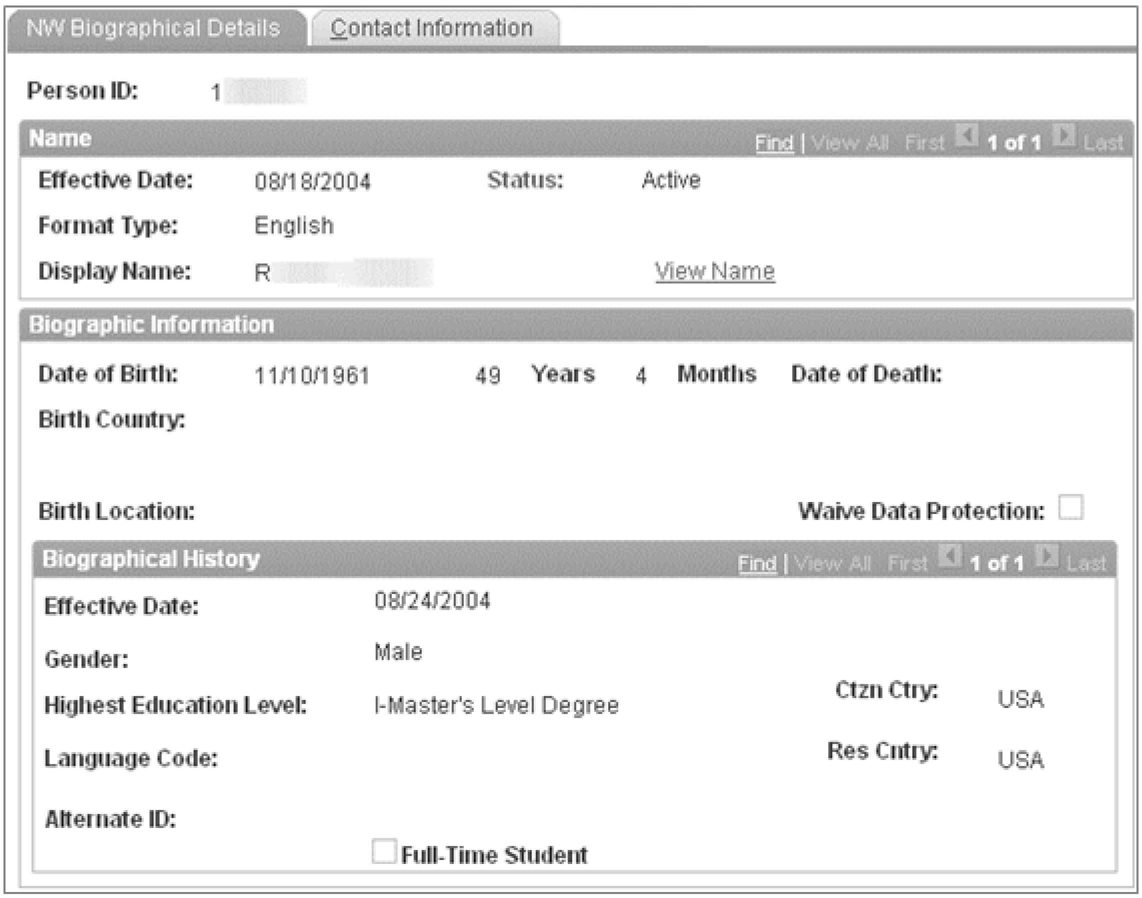
Navigation

WORKFORCE ADMINISTRATION > PERSONAL INFORMATION > PERSONAL DATA

Page Detail

The Personal Data screen consists of two tabs.

The **NW BIOGRAPHICAL DETAILS** tab displays name and demographic information:



- To view the complete, legal name for an individual, click the **View Name** link.
- **Ctzn Ctry** and **Res Cntry** provide information on the employee's country of citizenship and country of residency.
- **Highest Education Level** has not always been used consistently; do not rely on information listed here.
- **Full-Time Student** is updated nightly from the Registrar and indicates if this individual is enrolled as a full-time student at Northwestern. This does *not* indicate individuals taking part-time, evening, or certificate courses.

The **CONTACT INFORMATION** tab provides multiple addresses associated with this employee, including on- and off-campus; all phone numbers; email addresses; and the Northwestern NetID:

NW Biographical Details | Contact Information

R — Person ID: 1

Current Addresses — Customize | Find | View 5 | First 1-5 of 5 Last

Address Type	As Of Date	Status	Address	Address Code	
Home	08/18/2004	A			View Address Detail
Check	01/27/2006	A	EV IL 60208	Chk Addr = 1340	View Address Detail
I-9 Pull	08/24/2004	I			View Address Detail
W2	01/05/2010	A	EV IL 60208	Chk Addr = 1340	View Address Detail
University Mail	10/12/2004	A	Evanston Campus 2500	Empl Rcd = 0	View Address Detail

Phone Information — Customize | Find | View All | First 1-3 of 3 Last

Phone Type	Telephone	Extension	Preferred
Mobile			☐
Home			☑
Work Phone 1	847/491-		☐

Email Addresses — Customize | Find | View All | First 1-2 of 2 Last

Email Type	Email Address	Preferred
Campus	@northwestern.edu	☑
Net ID		☐

- The phone number and email address checked as "Preferred" will be the phone and email that display in the Northwestern Online Directory.
- An individual may add/update contact information and choose the preferred phone/email directly through myHR.

IDENTIFICATION DATA

Summary

Identification Data provides and visa/permit data for employees who are not U.S. citizens or permanent residents.

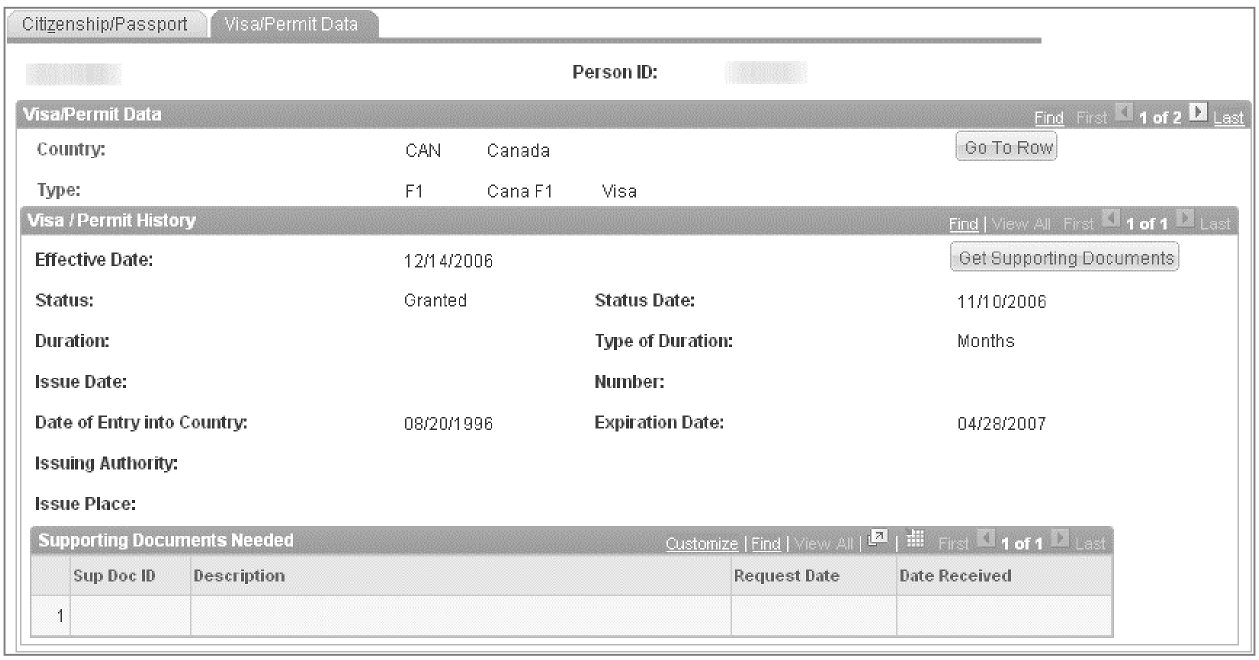
Navigation

WORKFORCE ADMINISTRATION > PERSONAL INFORMATION > CITIZENSHIP > IDENTIFICATION DATA

Page Detail

The Identification Data screen consists of two tabs. The **CITIZENSHIP/PASSPORT** tab will include information only if an individual's U.S. or foreign passport has been recorded for other purposes.

Employees who are not U. S. citizens may have a limited amount of information on the **VISA/PERMIT DATA** tab, including the Country, Visa/Permit Type, and Expiration Date:



EMERGENCY CONTACT

Summary

The Emergency Contact page provides access to the emergency contact information that an individual has entered into myHR.

Navigation

WORKFORCE ADMINISTRATION > PERSONAL INFORMATION > PERSONAL RELATIONSHIPS > EMERGENCY CONTACT

Page Detail

The **CONTACT ADDRESS/PHONE** tab lists an emergency contact's relationship, address, and phone number is displayed in the first tab.

If an employee has entered more than one Emergency Contact, the scroll bar will display the total number and allow you to scroll between contacts.

If an Emergency Contact has more than one phone number (e.g. Home, Cell, Work), only the primary number will appear on the Contact Address/Phone tab. Any additional phone numbers will appear under the **OTHER PHONE NUMBERS** tab.

Section 7

Payroll Data Pages

PAYCHECK

Summary

The primary administrative Paycheck view is the source for complete paycheck information, including hours worked, earnings, taxes, deductions, and chartstrings that were charged.

Navigation

PAYROLL FOR NORTH AMERICA > PAYROLL PROCESSING USA > VIEW PAYCHECK INFORMATION > PAYCHECK

Limitations

- **Security Limitations:** When viewing an individual's paycheck, be aware that it may not show complete earnings for that pay period. If the individual has another paid appointment to which you don't have security access, that information will not be included in your view.
- **Payroll Timing:** Paycheck drafts are visible on the page as soon as the payroll is calculated, which could be up to a few days before the actual pay date. Calculated paychecks are subject to change; be sure to check the **Paycheck Status** field to determine if a check is simply "Calculated" or is "Confirmed."

Searching for a Paycheck

A paycheck search should always be conducted using the individual's EmplID; name searches should not be used, as they can take a great deal of time to process.

After searching for a specific EmplID, myHR will return a list of all available paychecks sorted first by Pay Group and then by reverse Pay Period End Date. Depending on the number of results, you may have to include a date range in your search.

Search Results

View All First 1-51 of 51 Last

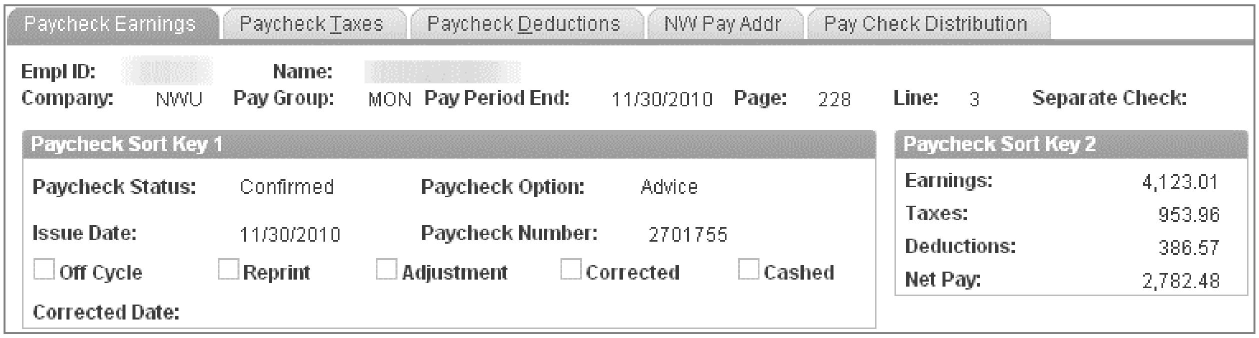
Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Paycheck Number	Empl ID	Name	Form Identification
NWU	MON	11/30/2010	N	228	3	2701755	1	F	NWUDD
NWU	MON	10/31/2010	N	227	4	2679890	1	F	NWUDD
NWU	MON	09/30/2010	N	230	4	2659109	1	F	NWUDD
NWU	MON	08/31/2010	N	241	4	2641515	1	F	NWUDD
NWU	MON	07/31/2010	N	235	4	2623313	1	F	NWUDD
NWU	MON	06/30/2010	N	231	4	2600612	1	F	NWUDD
NWU	MON	05/31/2010	N	234	4	2579809	1	F	NWUDD

- **Pay Period End Date** denotes the last day in the pay period for this check. Note that in most instances, this is not the actual check date.
- **Off Cycle** will denote "Y" if this check was processed on an off-cycle ("adjustment") payroll.

Page Detail

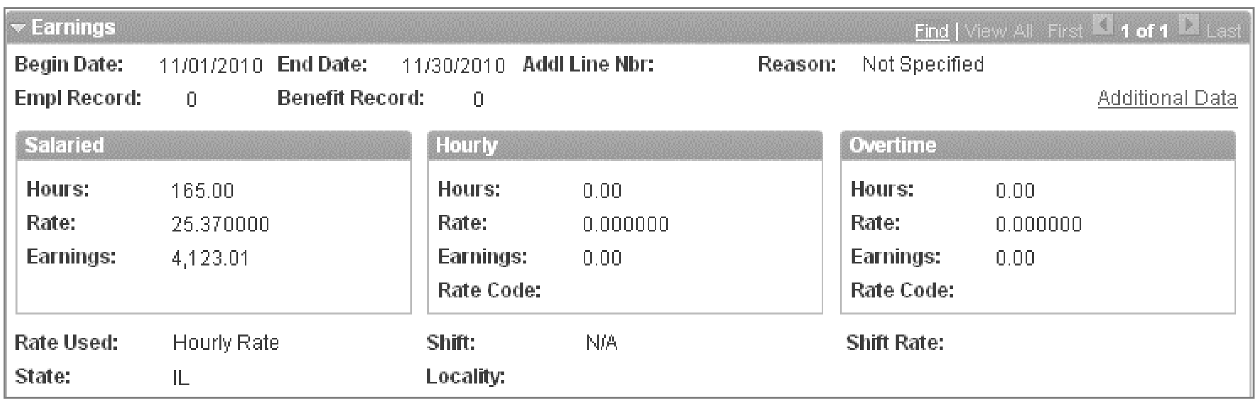
The administrative Paycheck view provides all payroll information in five tabs.

The **Paycheck Earnings** tab contains a paycheck summary, followed by a listing of all contracted and supplemental earnings:



- **Paycheck Status:** Indicates if the paycheck is in progress ("Calculated") or finalized ("Confirmed"). Only Confirmed paychecks should be considered final and processed/paid.
- **Paycheck Option:** Indicates "Advice" if the pay was direct-deposited or "Check" if a physical check was written.
- **Issue Date:** The date the paycheck was issues and/or the funds were sent to the individual's direct deposit account.

The **Earnings** box breaks down the paycheck earnings for each job/appointment. If more than one job is included, use the scroll arrows in the top bar to view the earnings for each job record.



- The **Salaried** and **Hourly** boxes will be used based on whether the position is exempt (salaried) or non-exempt (hourly). The **Overtime** box will denote any overtime pay for non-exempt employees.
- The **Additional Data** link displays related information such as Job Code, Position Number, and HR Department ID.

If additional or supplemental pay has been provided or reversed on this check, the **Other Earnings** box will include relevant details.

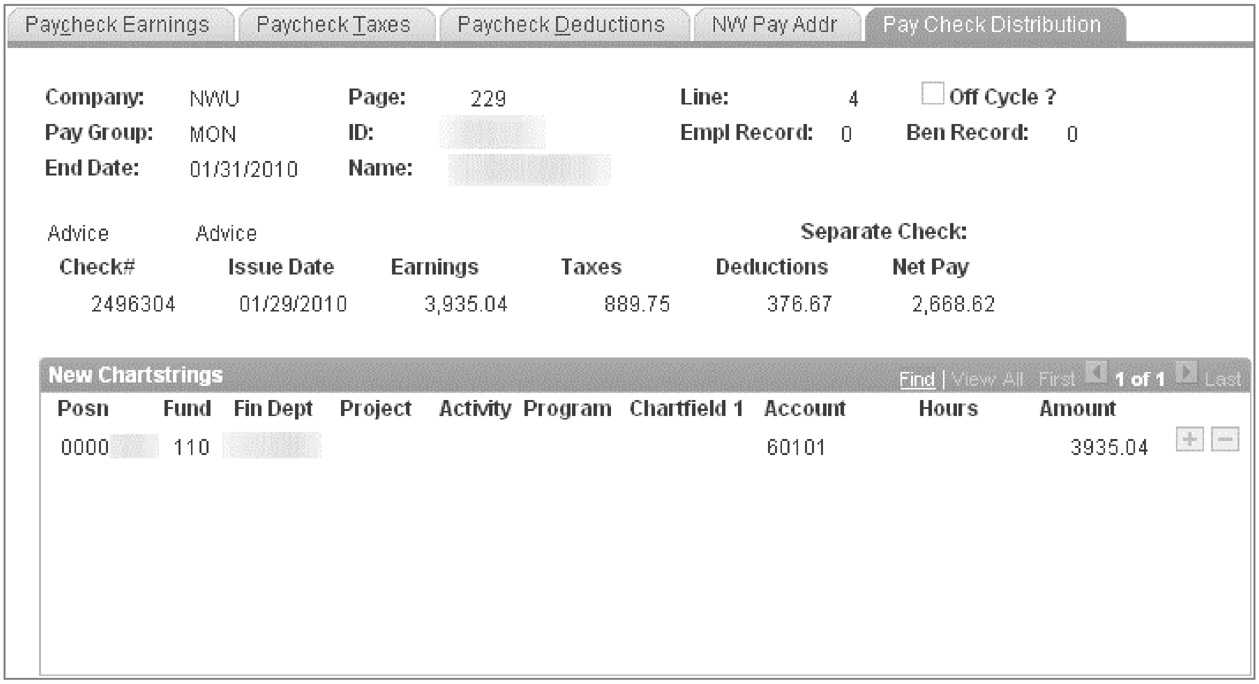
The **Paycheck Taxes** tab displays all federal, state, and local (if applicable) taxes that have been withheld from the employee's paycheck.

The **Paycheck Deductions** tab displays any non-tax deductions taken from the employee's paycheck, including wage garnishments. This tab also displays the bank account(s) to which the funds were direct-deposited.

- **Class**: "Before-Tax" notes that this deduction was removed from the earnings before taxes were calculated; "Taxable" notes that this deduction is considered taxable by law and was included in taxable income; "Nontaxable" denotes Northwestern's contribution to a benefits plan - this amount is not included in the individual's earnings or taxed.

The **NW PAY ADDR** tab displays the address appearing on that paycheck (if a paper check was written), or information on a paycheck hold (if missing paperwork required a hold to be placed).

The **PAY CHECK DISTRIBUTION** tab records which chartstrings were used to provide payment and what amount has been charged to each account.



- **Posn** denotes the Position Number for the pay that was charged to this chartstring.
- For non-exempt (hourly) employees, the **Hours** column will display the corresponding hours related to the pay.
- If an invalid chartstring was used, this tab will indicate that funds hit a suspense account by showing the code “SUSP” for **Chartfield 1**.

REVIEW SELF SERVICE PAYCHECK

Summary

Review Self Service Paycheck produces a view of an individual's pay stub as they would see by looking it up themselves in myHR. Unlike the administrative Paycheck view, this is a one-page printable summary of pay information.

Use this Review Self Service Paycheck page to:

- Print a paycheck stub to provide to an individual at their request.

Navigation

PAYROLL FOR NORTH AMERICA > PAYROLL PROCESSING USA > PRODUCE PAYROLL > REVIEW SELF SERVICE PAYCHECK

Page Detail

After searching for an individual, you'll be presented with a summary of paychecks to download in printable or savable PDF format.

CHECK YEAR-TO-DATE

Summary

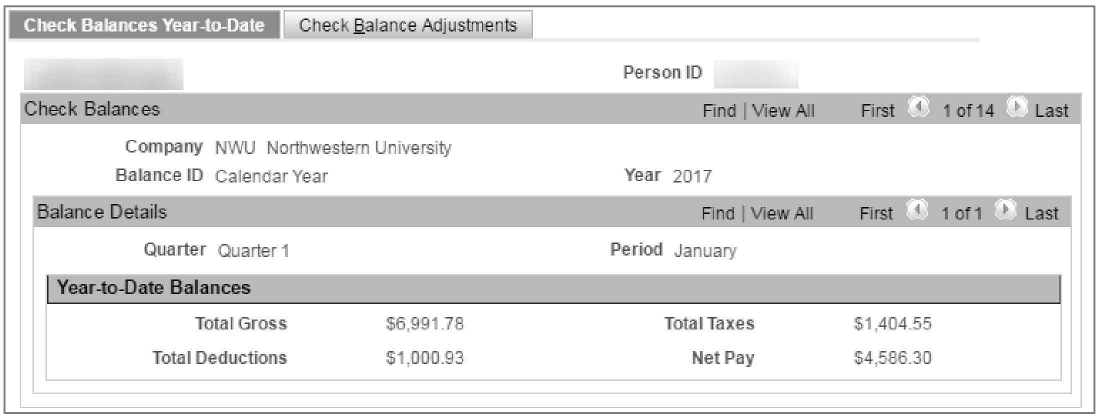
The Check Year-to-Date page provides easy access to view calendar year-to-date earnings and adjustments.

Navigation

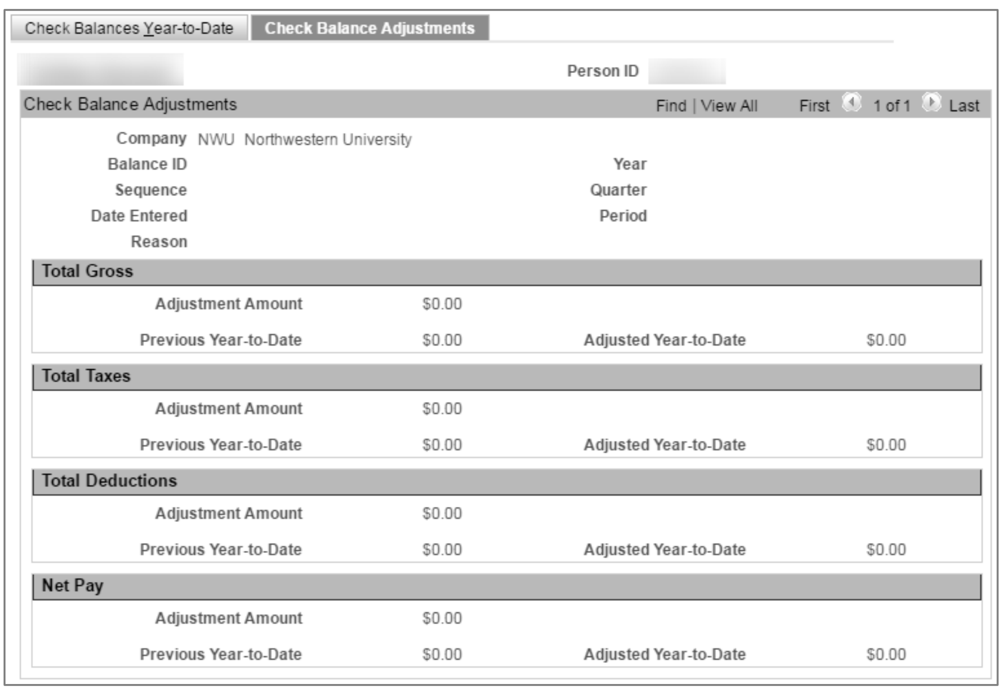
PAYROLL FOR NORTH AMERICA > PERIODIC PAYROLL EVENTS USA > BALANCE REVIEWS > CHECK YEAR-TO-DATE

Page Detail

The **CHECK BALANCES YEAR-TO-DATE** tab displays total gross pay, taxes, deductions, and net pay to an individual for the current calendar year:



The **CHECK BALANCE ADJUSTMENTS** tab will indicate any year-to-date adjustments that have been processed for an employee:



TAX DATA

Summary

Tax Data provides a summary of an individual's federal and state W-4 withholdings, as submitted to payroll.

Use the Tax Data page to:

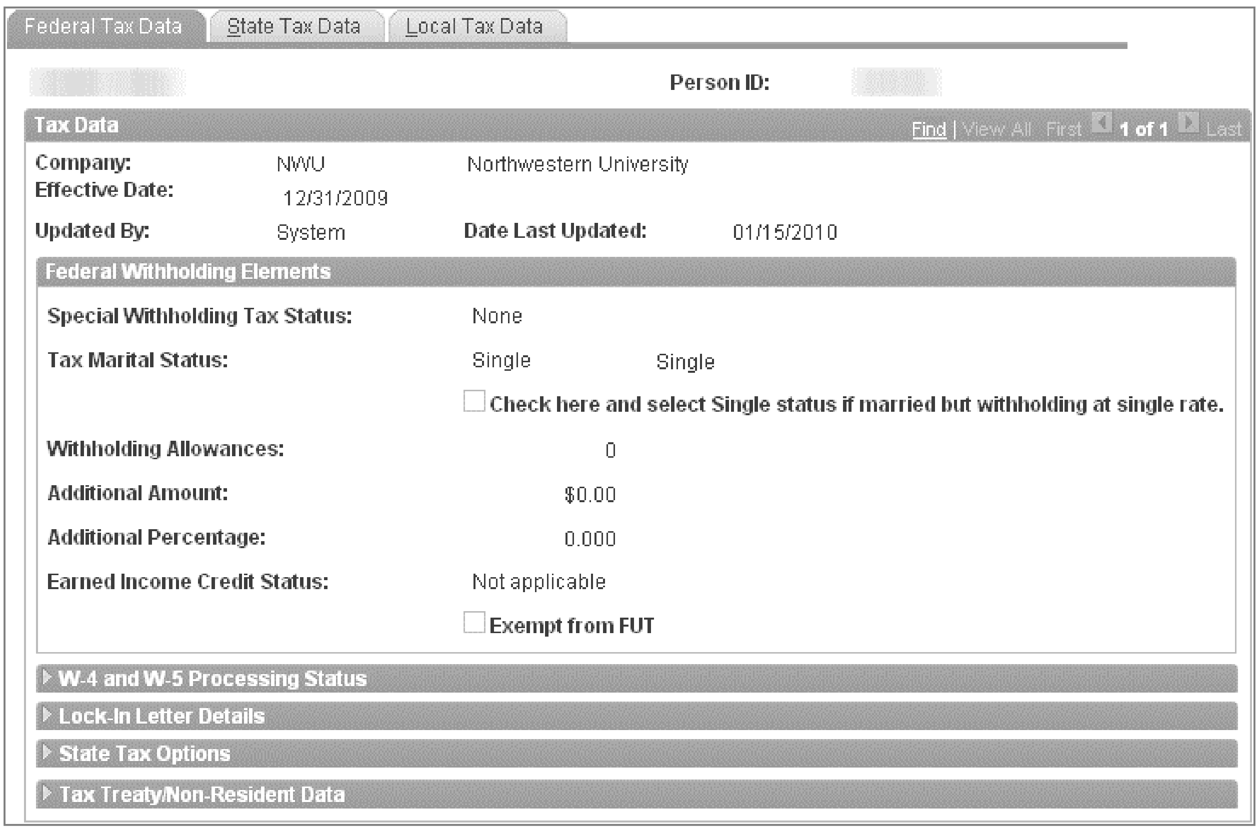
- Review an individual's withholdings if they have questions about how much tax is withheld from their paycheck.

Navigation

PAYROLL FOR NORTH AMERICA > EMPLOYEE PAY DATA USA > TAX INFORMATION > UPDATE EMPLOYEE TAX DATA

Page Detail

The **FEDERAL TAX DATA** and **STATE TAX DATA** tabs will display the most recent withholding information that the individual has submitted to the Payroll office:



- The **Effective Date** indicates when these changes took effect.
- **Tax Marital Status**, **Withholding Allowances**, **Additional Amount**, and **Additional Percentage** come directly from the individual's federal or state W-4.
- The **Tax Treaty/Non-Resident Data** box will include tax treaty information for any non-resident employees. For more details on tax treaties, contact the Payroll Office.

The **LOCAL TAX DATA** tab will apply only for employees working in Northwestern locations that withhold local taxes.

Section 8

Administration Procedures

REPORTS TO APPROVERS

Summary

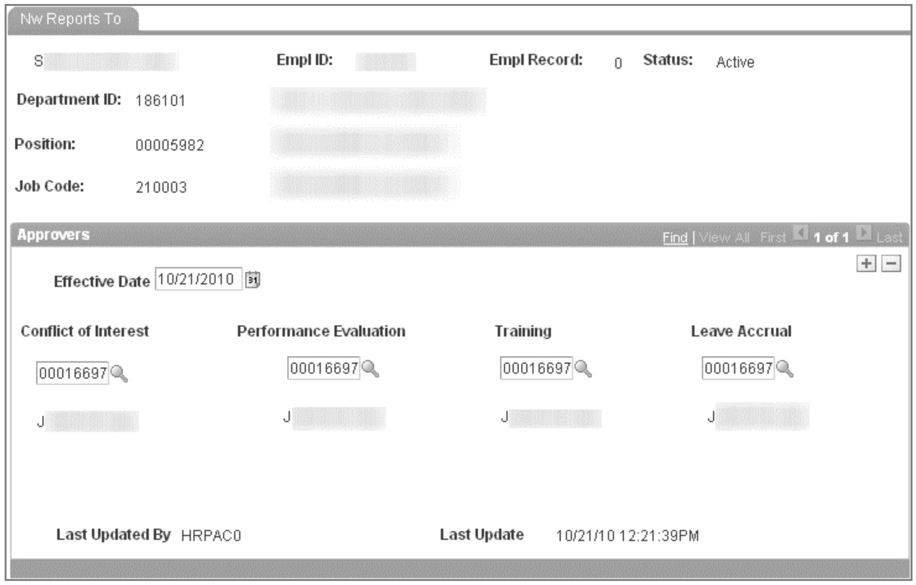
Use the Reports To page to set supervisors and approvers for various HR functions.

Navigation

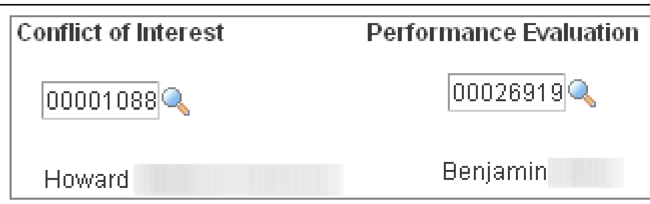
WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN APPROVER INFORMATION > REPORTS TO

Page Detail

Upon entering the Reports To page for a specific employee, the most current approver information will be displayed:



To update one or more approvers:

1.	Click to add a new row of information.
2.	The **Effective Date** will change to the current date.
3.	For each approver you wish to change, enter the 8-digit position number for that approver in the appropriate box (click the search icon to search by name). 
4.	Click Save. The changes will be saved, and myHR will display your myHR ID and the current time as the **Last Updated By** and **Last Update** fields: 

Additional Information:

- All four approvers may be the same person/position, but they may be different depending on the needs of the department.
- You are not allowed to save an approver that is currently an empty position; you will receive an error message.

- When an employee *transfers,* these approvers are *not* automatically updated; the changes must be entered into this page by the new department.
- Users are not allowed to update their own approvers.
- Graduate students, temps, and employees in a 1-to-Many position cannot be assigned as an approver.
- **Temporary Employees will not display on this page.** The Time Card Approver and Training Approver for temps must be edited on the Temp Panel. (Refer to the myHR Temp Administration Guide.)

KRONOS BACKUP SUPERVISORS

Summary

Use this page to set backup supervisors with the authority to approve staff or temporary employee timesheets in Kronos.

By default, the primary Kronos approver for employees' work and leave time is as follows:

- **Temporary Employees:** The person set as "Time Card Approver" in the Temp Panel (may be changed directly by users with Temp Panel access)
- **Biweekly/Monthly Staff and Librarians:** The person set as the "Leave Accrual" approver on the Reports To page.

Additionally, up to two Backup approvers may be assigned for a Primary approver within each HR Department ID. **Backup approvers will have access to see and approve time for *all employees* as the Primary approver in that Department ID.**

Navigation

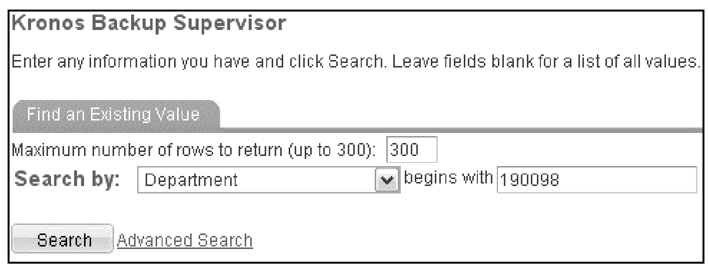
WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN KRONOS DATA > KRONOS BACKUP SUPERVISORS

Page Detail

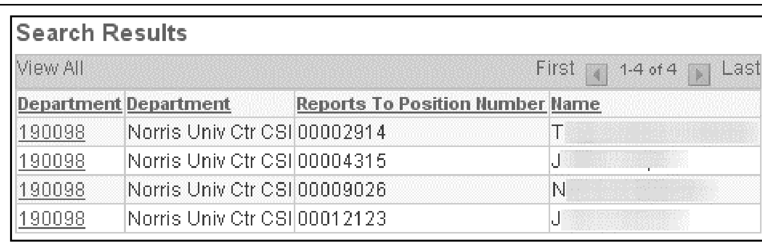
Note: You must set a backup for each 6-digit DeptID seperately. For example, if Bonnie Boe approves time cards for employees in departments 267300, 267301, and 267398, backups must be set for Bonnie in each of the three departments.

To update Kronos Backup approvers:

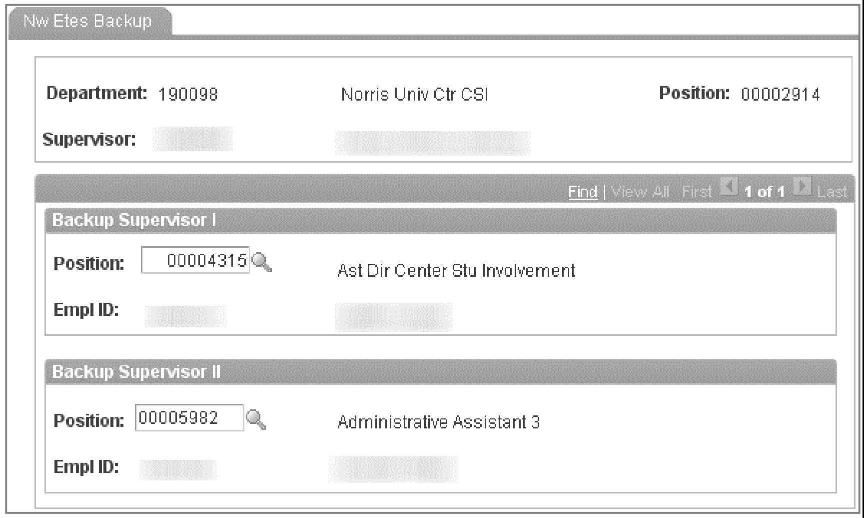
1. Search for a 6-digit HR Department ID number:



2. If there are multiple primary approvers within that department, you will be asked to choose the approver to assign a backup for:



Department	Department	Reports To Position Number	Name
190098	Norris Univ Ctr CSI	00002914	T
190098	Norris Univ Ctr CSI	00004315	J
190098	Norris Univ Ctr CSI	00009026	N
190098	Norris Univ Ctr CSI	00012123	J

3.	Enter the 8-digit Position Number for the employee(s) you wish to assign as backups; you may assign up to two.	
4.	Click the Save button.	

Additional Information

- Kronos changes update overnight; the next day, new Backup approvers will see the employees in Kronos and any removed backup approvers will no longer see the timecards.

Expenses Supervisors

Summary

Use this page to set the primary Expenses Supervisor for an individual; this is the person responsible for approving electronic expense reports in NUFinancials.

Navigation

Workforce Administration > Job Information > Maintain Approver Information > Expenses Supervisors

---

Page Detail

To update an employee's primary Expenses Supervisor:

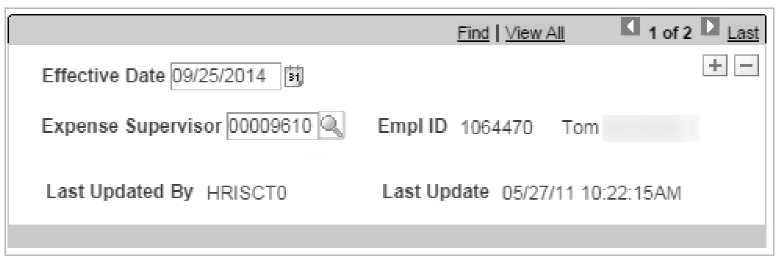
1. Search for the employee whose Expenses Supervisor you wish to update.

2. Click [+] to add a new row of information.

Note: The **Effective Date** will change to the current date; this does not need to be modified.

3. In the **Expenses Supervisor** box, enter the 8-digit position number for the new Expenses Supervisor.

Note: If you do not know the position number of the individual you are assigning, click [search icon] to search by name.



4. Click Save.

For whom can you set an Expenses Supervisor in FASIS?

This page will allow you to set an expenses supervisor for these employees:

- Active and Terminated employees paid in the last 120 days in the following pay groups: MON (monthly staff), MOF (monthly faculty), BIR (biweekly staff), MGW (graduate students), and NMF (Northwestern Medical Group)
- Active and Terminated employees paid in the last 120 days in the BIT (temporary employee) pay group *only* in HR DeptID 8300xx (Traffic Institute)
- New hires in the MON, MGW, NMF, MOF and BIR pay groups with a status of A (Active), L (Unpaid Leave), or P (Paid Leave) – even if that new hire has not yet received a paycheck
- Active employees in the OTH (unpaid) pay group with a status of L (Unpaid Leave) or P (Paid Leave)

Employees with paid and unpaid appointments: For any employee that satisfies one of these categories and holds an additional unpaid appointment (pay group OTH), an Expenses Supervisor may be assigned to that unpaid appointment *in addition to* the supervisor for the regular, paid record.

Temporary Employees: Note that temporary employees (except in the Traffic Institute) cannot have an Expenses Supervisor assigned in myHR.

Electronic Expenses Policies: While an Expenses Supervisor may be assigned in myHR for employees who meet the criteria above, electronic expense reports are always subject to NUFinancials access restrictions and University reimbursement policies. For more information, see:

Rules & Notes

- You will receive an error if you try to assign an Expenses Supervisor position that is currently empty (has no incumbent).
- When a new employee is hired, the Expenses Supervisor will default to that employee's Department Administrator, unless otherwise noted on the hiring paperwork.
- When an employee *transfers,* the Expenses Supervisor is *not* automatically updated; the change must be entered into this page by the new department.
- Users are not allowed to update their own Expenses Supervisor.
- Graduate students, temporary employees, and employees in a 1-to-Many position cannot be assigned as an Expenses Supervisor.
- The "Last Updated Date" will indicate the last time *any* approver was updated for this employee; note that this may refer to a Kronos, Training, or Conflict of Interest Approver.

EXPENSES SUPERVISOR BACKUPS

Summary

Use this page to set up to two backup approvers for an individual's Expense Report in NUFinancials.

Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN APPROVER INFORMATION > EXPENSES SUPERVISOR BACKUPS

Page Detail

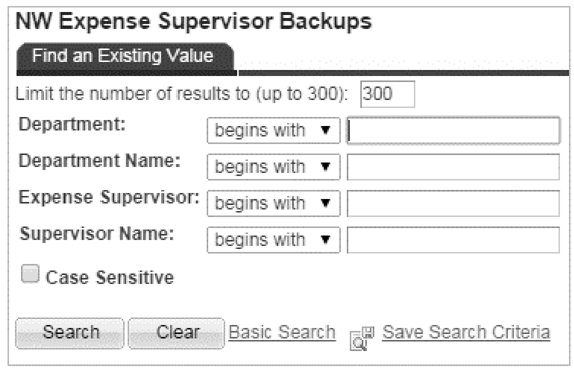
To update an employee's backup Expenses Supervisors:

1. Search for one of the following fields:

Department: enter a full or partial HR DeptID to see a list of all existing Expenses Supervisors in that department

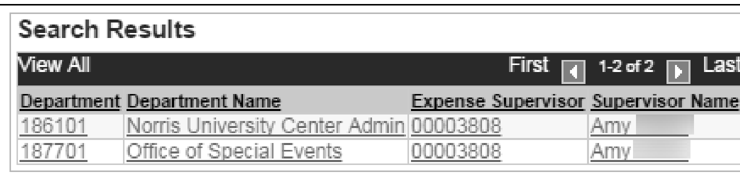
Expenses Supervisor: enter the 8-digit position number for an existing Expenses Supervisor

Supervisor Name: the name of an existing Expenses Supervisor, in the format FirstName LastName



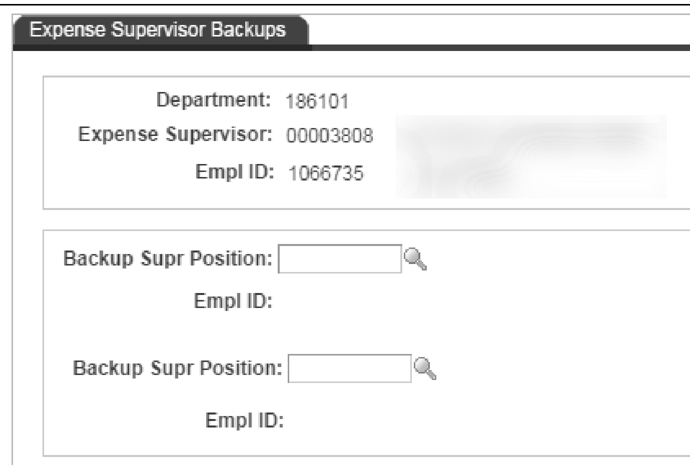
Note: If an Expenses Supervisor is assigned to multiple HR DeptIDs, you must set a backup for each 6-digit DeptID separately. For example, if Bonnie Smith approves expenses for employees in departments 267300, 267301, and 267393, the backup must be set for each of the three departments using the procedure below.

2. If there are multiple results, choose a DeptID/Expenses Supervisor combination for which you would like to set a backup:



3. In the **Backup Supr Position** boxes, enter the 8-digit position number for the Backup. You may enter one or two backups; if you are replacing an existing backup, simply type over the existing data.

Note: If you do not know the position number of the individual you are assigning, click to search by DeptID and obtain a list of all employees within a particular Department.



4. Click the  button.

DCFS and Staff Handbook Attestations

Summary

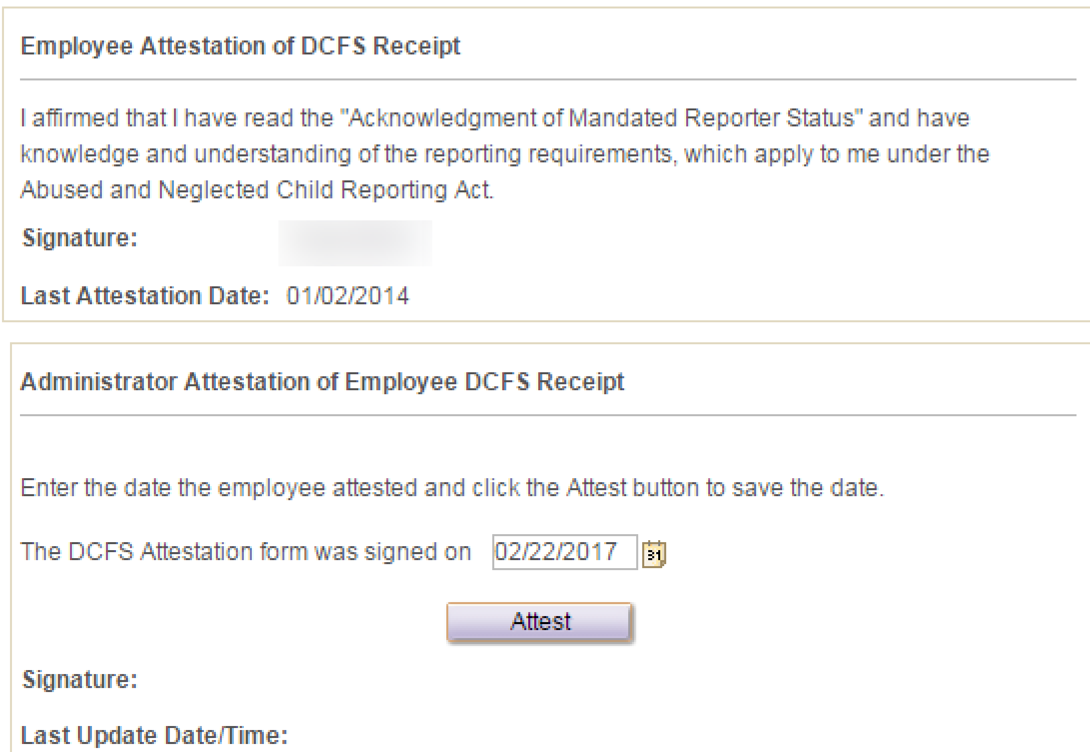
This administrative page can be used to confirm if and when an individual submitted their required electronic sign-off as a DCFS Mandated Reporter (all paid individuals, except students) and Staff Handbook Receipt (all staff employees). On this page, administrators can also manually record paper signatures for those who cannot attest online in myHR.

Navigation

Workforce Administration > Attestations > DCFS and Staff Handbook

Page Detail

Upon searching for an individual, both attestations will be available. If a signature is listed, the individual has attested either electronically in myHR or manually in the Office of Human Resources. A missing signature indicates an incomplete attestation for that person:



To record a manual attestation:

1.	Enter the attestation date in the appropriate field.
2.	Click “Attest.”
3.	Retain the individual’s paper signature in your own files.

ONLINE DIRECTORY HR

Summary

Use the Online Directory HR page to update an individual's Northwestern Online Directory information on their behalf.

Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > ONLINE DIR HR

Page Detail

After searching for an employee in the Online Directory HR page, you will see the directory record for that individual. The page and process for editing directory information is exactly the same as the process used in myHR to update your own directory record.

The following fields can be changed, added, or modified on behalf of an employee:

- Professional Name
- Spouse Name
- Home Address, Off-Campus Address
- Phone Numbers
- Which Job Records to display, and in which order (for employees with multiple jobs)
- Whether or not to display the employee's Department Title (if it is different than the University Title)
- Location addresses assigned to each job
- Whether University mail should be sent to the employee's campus address or home address
- Any additional email addresses

Updates made to this directory information should be reflected in the Northwestern Online Directory the following day.

SETTING NETID COORDINATORS

Summary

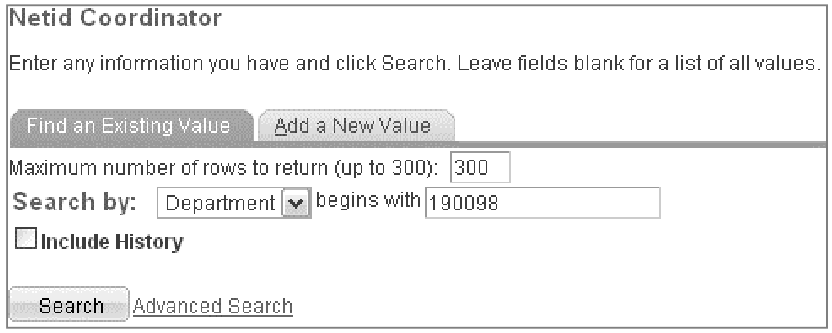
The NetID Coordinator is the contact within a department that is responsible for ensuring that new employees received instructions to active their NetID and University email address.

Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > NETID COORDINATOR

Page Detail

To view and/or edit the NetID Coordinator for a specific department, you must first enter an HR Department ID Number:



To modify a department's NetID Coordinator:

1. Search for the 6-digit Department ID number for the department you wish to change.
2. Click + to add a new row of information; note the **Effective Date** will automatically change to the current date:

3. Enter the Position Number of the person you wish to assign as NetID Coordinator in the Netid Coordinator Position box.
4. Click Save.

JOBCODE MATRIX

Summary

The Jobcode Matrix allows all myHR users to see information about how to use each active Job Code.

Use the Jobcode Matrix page to:

- Review the characteristics of an existing Job Code
- Determine the appropriate Job Code to use when creating a new position or update an existing position title.
- Find a job code based on specific criteria (e.g. title, Position Type, etc.)

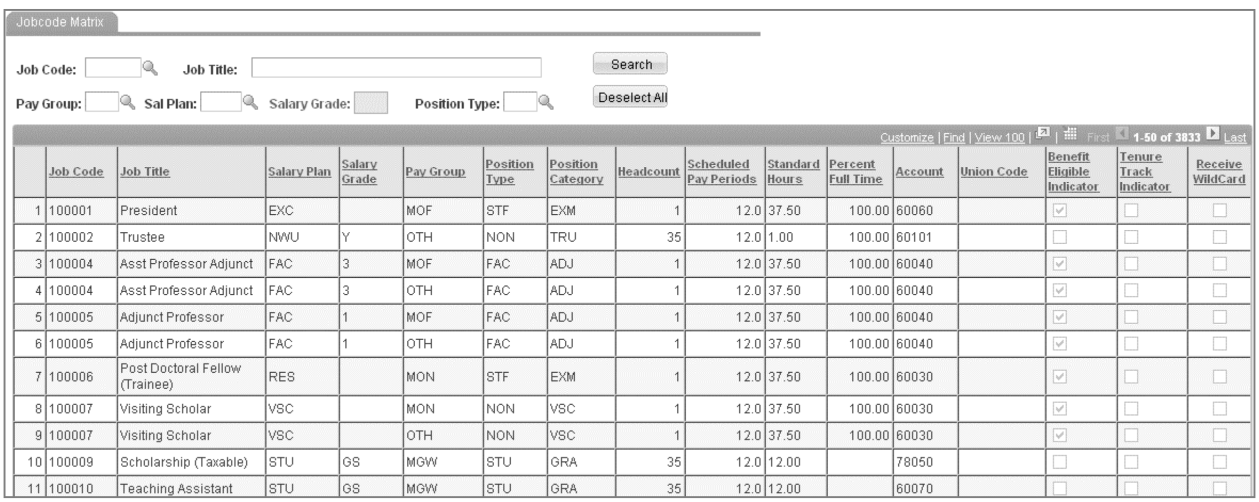
Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > VIEW JOBCODE MATRIX

Page Detail

Entering the Jobcode Matrix page will automatically produce a listing of all active Job Codes at Northwestern. To quickly find the information you're looking for, you may search for a specific Job Code, or for a number of Job Codes that match certain characteristics.

When searching by Job Title, use the percent sign (%) as a wildcard. For example, seaching for %Director% will find any job code with the word "Director" in its title.



Jobcode Matrix

Job Code: Job Title: Search

Pay Group: Sal Plan: Salary Grade: Position Type: Deselect All

Customize | Find | View 100 | First 1-50 of 3833 Last

	Job Code	Job Title	Salary Plan	Salary Grade	Pay Group	Position Type	Position Category	Headcount	Scheduled Pay Periods	Standard Hours	Percent Full Time	Account	Union Code	Benefit Eligible Indicator	Tenure Track Indicator	Receive WildCard
1	100001	President	EXC		MOF	STF	EXM	1	12.0	37.50	100.00	60060		☑	☐	☐
2	100002	Trustee	NWU	Y	OTH	NON	TRU	35	12.0	1.00	100.00	60101		☐	☐	☐
3	100004	Asst Professor Adjunct	FAC	3	MOF	FAC	ADJ	1	12.0	37.50	100.00	60040		☑	☐	☐
4	100004	Asst Professor Adjunct	FAC	3	OTH	FAC	ADJ	1	12.0	37.50	100.00	60040		☑	☐	☐
5	100005	Adjunct Professor	FAC	1	MOF	FAC	ADJ	1	12.0	37.50	100.00	60040		☑	☐	☐
6	100005	Adjunct Professor	FAC	1	OTH	FAC	ADJ	1	12.0	37.50	100.00	60040		☑	☐	☐
7	100006	Post Doctoral Fellow (Trainee)	RES		MON	STF	EXM	1	12.0	37.50	100.00	60030		☑	☐	☐
8	100007	Visiting Scholar	VSC		MON	NON	VSC	1	12.0	37.50	100.00	60030		☑	☐	☐
9	100007	Visiting Scholar	VSC		OTH	NON	VSC	1	12.0	37.50	100.00	60030		☑	☐	☐
10	100009	Scholarship (Taxable)	STU	GS	MGW	STU	GRA	35	12.0	12.00		78050		☐	☐	☐
11	100010	Teaching Assistant	STU	GS	MGW	STU	GRA	35	12.0	12.00		60070		☐	☐	☐

POSITION DATA/APPOINTMENT FORMS

Summary

Position Data/Appointment Forms are used to submit new and updated Position or Appointment information to HR Operations for processing in myHR. When submitting a change to existing data, a Form must be pre-printed from myHR for the Position and/or Appointment that you wish to update.

Navigation

To print forms by EmplID:
WORKFORCE ADMINISTRATION > JOB INFORMATION > REPORTS > POSITION/APPOINTMENT BY EMPL

To print forms by Position Number:
ORGANIZATIONAL DEVELOPMENT > POSITION MANAGEMENT > POSITION REPORTS > POS/APPT FORM BY POSITION

Procedure

To print a Position Data/Appointment Form from either of the pages above:

1.	If this is your first time creating a form, or if you cannot remember your previous Run Control ID: • Click **ADD NEW VALUE** • Enter a **RUN CONTROL ID** that will be easy to remember next time (e.g. your NetID or FASIS ID) • Click **ADD** If you remember your previous Run Control ID: • Enter your **RUN CONTROL ID** • Click **SEARCH**
2.	Enter the **EmplID** or **Position Number** for the forms you want to print. *Note:* Click the **[+]** button to print forms for multiple employees/positions at the same time.
3.	Click **RUN**.
4.	Set and/or confirm the following options: • **SERVER NAME** is “PSUNX” • **TYPE** is “Email” • **FORMAT** is “PDF” *Note:* After setting these options for the first time, they will default in the next time you log in with the same Run Control ID in Step #1.
5.	Click **OK**. Your forms will run in the background and will be emailed to your Northwestern or NMG email address as PDF attachements.

Additional Information

For more information on completing Position Data/Appointment Forms, refer to the Administration section of the myHR website at: www.northwestern.edu/myHR/admin/.

Running Queries

Summary

Users with access to the myHR Query Viewer or Query Manager may run existing data queries to produce canned reports of HR and Payroll information.

Navigation

For users with Query Viewer access:
Reporting Tools > Query > Query Viewer

For users with Query Manager access:
Reporting Tools > Query > Query Manager

Procedure

To run a canned report:

1.	Search for the name of an existing query report that you'd like to run. To see a full list of HR-maintained "Public" queries for common use, simply search for the letters "PUB."
2.	In your search results, click the appropriate link to view your query results on screen ("HTML") or to immediately download into an excel spreadsheet ("Excel").
3.	Some queries may require additional input before proceeding. If so, you will be prompted to enter additional information before results are displayed.

Additional Information

For more information on using queries, including a list of available "Public" queries for your use, refer to the Administration section of the myHR website at: www.northwestern.edu/myHR/admin/.

Section 9

Data Definition Directory

DATA DEFINITIONS

The following definitions explain some of the most common data fields available across pages, forms, and functions in myHR administration.

Find in myHR: Each definition includes some of the primary pages where the data can be found in myHR. Not all locations may be listed, and access to the pages will depend on your level of myHR access.

Unique Fields: Some pages in myHR contain their own unique data fields that are not found anywhere else in the system. If a definition does not appear below, refer to the specific page's section earlier in this guide.

More Information: This data directory is intended to provide a brief overview of common fields and may not represent the complete definition, related transaction, or guiding policy. For additional information, refer to previous sections in this Guide; review policies and documentation on the myHR Admin and Human Recourses websites; or contact your department's Dean's, Faculty Affairs, or Business/Finance office.

Academic Appointment Type

Summary: *(faculty only)* Indicates whether an academic appointment is either "Primary" (P), "Joint" (J), or "Secondary" (S).

Find in myHR: Appointment Overview, Appointment History, Job Data – Nw Job Data tab

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Academic Base Salary (ABS)

Summary: *(faculty only)* Indicates how much a faculty member earns per contracted month; typically, the Annual Salary for an appointment divided by its Contract Period. myHR will calculate and display the ABS for faculty with a 9-month, a 12-month, or a mix of 9- and 12-month Contract Periods. The ABS for faculty with other contract periods will not display, and will be replaced by a message to contact the Effort Reporting Manager.

Find in myHR: Current Salary, Salary History, Employment Info – Employment Info tab – Academic Base Salary Calculations link

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Academic Rank

Summary: *(faculty only)* Combined with the Career Path, provides detail about a faculty appointment at Northwestern. Academic ranks are maintained by the Office of the Provost and typically are indicated by the faculty members Job Title.

Find in myHR: Appointment Overview, Appointment History, Faculty Tenure

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Action Code / Action Reason Code

Summary: The three-letter Action and Action Reason codes record historical details for every change made to a position or job record during its lifecycle at Northwestern. Along with the Effective Date, these fields provide a summary each update made to information in myHR, whether processed manually (by submitting a form) or through a system action (e.g. setting a merit increase). For more information about these codes, see the Action/Reason Code Matrix on the myHR Admin website.

Find in myHR: Position Data, Job Data

Action Date

Summary: Records when a transaction was physically entered into myHR by a Human Resources representative. Note that this is *not* the same as the Effective Date.

Find in myHR: Position Data, Job Data

Annual Benefits Base Rate (ABBR)

Summary: This amount is used to calculate an employee's benefits salary tier. Note that the ABBR will appear only on a job record that is tied to benefits. For employees with multiple job records, review each record to find the ABBR.

Calculation: ABBR is typically set every January 1st, using the employee's salary from the previous September 1st. The ABBR may change mid-year for specific salary or benefits changes.

Find in myHR: Job Data – Benefits Program Participation tab, Employment Info – Employment Info tab

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Annual FTE Salary (Full Time Equivalent Salary)

Summary: The annual salary for a job, expressed as if the employee was working 100% Full Time (or 37.5 hours) in that particular job only. For regular, full-time employees with one job, this will be the same as their Annual Rate.

Calculation: Annual Rate x FTE

Find in myHR: Current Salary, Salary History, Job Data – Compensation tab

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Annual Rate

Summary: The contracted annual salary for an appointment (does not include any additional, supplemental, or overtime pay).

Calculation: For monthly-paid individuals, Compensation Rate x 12 months; for biweekly-paid, Compensation Rate x 1957.5 hours.

Find in myHR: Current Salary, Salary History, Job Data – Compensation tab

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Annual Renewable

Summary: Used typically by Feinberg and Pritzker to identify certain appointments that are reviewed and renewed on an annual basis.

Find in myHR: Appointment Overview, Appointment History, Job Data – Nw Job Data tab

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Appointment End Date

Summary: The end date currently on record for an appointment; the appointment will be automatically terminated after this date if it is not extended. *Note:* Appointments may have an "indefinite" end, reflected by a blank Appointment End Date.

Find in myHR: Appointment Overview, Appointment History, Job Data – Nw Job Data tab

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Appointment Indicator

Summary: The Appointment Indicator is used by certain schools to track classifications of specific faculty or research employees. Refer to your dean's or faculty affairs' office for more information about Appointment Indicators used in your area.

Find in myHR: Appointment Overview, Appointment History, Job Data – Nw Job Data tab

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Appointment Start Date

Summary: The most recent date that an individual began in the appointment, without a break in service.

Calculation: The Appointment Start Date is reset when an individual is hired, rehired, reappointed, transferred, promoted, demoted, or receives a position reclassification.

Find in myHR: Appointment Overview, Appointment History, Job Data – Nw Job Data tab

---

Benefit Program

Summary: The three-letter code indicating the benefit program in which the employee is currently enrolled. Benefit Program is tied to a particular Job Record; for employees with multiple jobs, review this information for each Job Record.

Find in myHR: Job Data – Benefits Program Participation link, Employment Info – Employment Info tab

---

Benefits Service Date

Summary: The date an individual last became a benefits-eligible employee. This field is typically used to determine employee seniority at Northwestern.

Find in myHR: Job Data – Employment Data link – Nw Asgn Dates tab, Employment Info – Employment Info tab

---

Benefits Status

Summary: An individual's eligibility for benefits at Northwestern (does *not* indicate possible enrollment in benefits). May be: "Benefits Eligible", "Non-Benefits Eligible", or "Retiree Benefits."

Calculation: Uses a combination of full-time status, contract period, and position type/category to determine if the person is eligible for benefits.

Find in myHR: Appointment Overview, Appointment History

Budgeted Salary

Summary: The annual salary set up and budgeted for this position during budget preparation for the fiscal year. Usually this is the same as the incumbent's Annual Rate, but may differ if an incumbent's compensation changed mid-year.

Find in myHR: Position Data – Nw Position Data tab

Career Path

Summary: *(faculty only)* Combined with the Academic Rank, provides detail about a faculty appointment at Northwestern. Career paths are maintained by the Office of the Provost

Find in myHR: Appointment Overview, Appointment History, Faculty Tenure

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Check Address Code

Summary: A four-digit code that indicates to which on-campus address a person's payment should be sent. This address is used for any paper payroll checks (if an individual does not have direct deposit, or direct deposit fails) or paper reimbursement checks from Accounts Payable. Note this is *not* the same as the 4-digit Location Code.

Find in myHR: Personal Data – Contact Information tab

Compensation Rate

Summary: The pay rate for an individual, indicated as a monthly amount (for monthly-paid) or an hourly rate (for biweekly-paid).

Find in myHR: Current Salary, Salary History, Job Data – Compensation tab

---

Contract Period

Summary: The length of time (in months) that an individual is contracted to "work" within a single academic/fiscal year. This is typically "12" for year-round staff, research staff, and Chicago faculty. Evanston teaching faculty may have a 9-month Contract Period.

Find in myHR: Appointment Overview, Appointment History, Current Salary, Salary History, Job Data – Nw Job Data tab

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Current Hire Date

Summary: The earliest date of hire or rehire without a break in service from all active appointments; i.e. the last time the individual became active at Northwestern. (This is the same as the Last Start Date.)

Find in myHR: Appointment Overview, Appointment History

Department Title (Business Title)

Summary: The Department Title can be a modification of a position's official University Title. Department Titles must be justified to and approved by HR Compensation and/or the Office of the Provost. If no official Department Title is available, this will display the default University Title.

Find in myHR: Position Data – Description tab ("Title" field), Job Data – Employment Data link

---

Effective Date

Summary: Combined with the Action Code and Action Reason Code, the Effective Date indicates when a certain transaction was applied to a position of job record (e.g. when a salary increase took effect for an individual).

Find in myHR: Position Data, Job Data

Exclude Merit Base Salary

Summary: This field indicates if a particular appointment's salary should be *excluded* from merit planning, i.e. is not eligible for an annual merit increase. If excluded, this field will indicate a reason.

Find in myHR: Current Salary, Salary History, Job Data – Nw Job Data tab

---

First Start Date

Summary: The first time an individual began an HR relationship with Northwestern. (This field is the same as the Original Start Date.)

Calculation: This field is set the first time an individual received a record in myHR, regardless of the type or reason. This date is never changed.

Find in myHR: Job Data – Employment Data link

FTE (Full Time Equivalency)

Summary: The FTE uses either Standard Hours (for biweekly-paid individuals) or Percent Full Time (for monthly-paid individuals) to standardize and compare full-time status across both populations. An FTE of "1" is equivalent to at least 37.5 Standard Hours or 100% Full Time. FTE "0.5" is equal to 18.75 Standard Hours or 50% Full Time.

Find in myHR: Job Data – Job Information tab

Home Department

Summary: The HR department ultimately responsible for an individual. For those with multiple appointments, the Home Department takes the lead in promotion, tenure, salary, and disciplinary decisions. This usually is the department of the individual's Primary Role.

Find in myHR: Appointment Overview, Appointment History

Institutional Base Salary (IBS)

Summary: The total contracted annual salary for an individual, excluding any additional pay or other earnings.

Calculation: The sum of the Annual Rate for all paid appointments.

Find in myHR: Current Salary, Salary History, Employment Info – Employment Info tab – Academic Base Salary Calculations link

---

Last Start Date

Summary: The earliest date of hire or rehire without a break in service from all active appointments; i.e. the last time the individual became active at Northwestern. (This is the same as the Current Hire Date.)

Find in myHR: Job Data – Employment Data link

Location / Location Code

Summary: A four-digit code ("Location Code") that identifies the physical campus location for a department or a position. This is the location used for an employee's Online Directory entry and official university mailings.

Find in myHR: Position Data, Northwestern Job Summary – Empl Location tab

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Merit Base Salary

Summary: An individual's total annual salary that is eligible for a merit increase at the end of the fiscal year.

Calculation: The Institutional Base Salary *minus* any salaries that are marked using the "Exclude Merit Base Salary" field.

Find in myHR: Current Salary, Salary History

Monthly Contracted Rate

Summary: The monthly salary for an appointment, as related to the appointment's Contract Period. For appointments with a Contract Period less than 12 months, this will *not* be the same as the Compensation Rate

Calculation: Annual Salary ÷ Contract Period

Find in myHR: Current Salary, Salary History, Job Data – Nw Job Data tab, Employment Info – Employment Info tab

---

NU Status

Summary: An individual's overall Northwestern status; may be either "Active" (A) or "Terminated" (T). Note this is *not* the same as Payroll Status, which will provide additional details per appointment, including leaves of absence.

Calculation: If all of an individual's appointments are terminated, the NU Status will be "Terminated." If an individual has at least one non-terminated record, their NU Status will be "Active."

Find in myHR: Appointment Overview, Appointment History

Original Start Date

Summary: The first time an individual began an HR relationship with Northwestern. (This field is the same as the First Start Date.)

Calculation: This field is set the first time an individual receives a record in myHR, regardless of the type or reason. This date is never changed.

Find in myHR: Job Data – Employment Data link

Payroll Status

Summary: The status of an individual's appointment; may be "Active" (A), "Deceased" (D), "Leave of absence" (L), "Leave with pay" (P), "Suspended" (S), or "Terminated" (T). Note this is *not* the same as NU Status, which simply designates an individual as Active or Terminated.

Find in myHR: Appointment Overview, Appointment History, Current Salary, Salary History

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Percent Full Time (%FT)

Summary: *(monthly-paid individuals only)* The amount of time in a typical workweek, out of 100%, that a monthly-paid individual is working in a particular position. This will be "0" for biweekly-paid, adjunct, and grad student records.

Find in myHR: Current Salary, Salary History, Position Data – Nw Position Data tab, Job Data – Nw Job Data tab

---

Position End Date

Summary: The end date currently on record for this position; after this date, the position cannot be reused or posted to the Careers website without being reactivated. *Note:* Positions may have (and typically should have) an "indefinite" end, reflected by a blank Position End Date.

Find in myHR: Position Data – Nw Position Data tab, Job Data – Nw Job Data tab

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Primary Function

Summary: An individual's primary grouping at Northwestern (e.g. Faculty, Staff, Student, Affiliate). This field is particularly helpful to identify the main grouping for an individual that has multiple types of appointments.

Criteria: Primary Function is determined by an individual's Primary Role.

Find in myHR: Appointment Overview, Appointment History

Primary Role

Summary: Every regular, paid individual has one and only one Primary Role, which indicates the job and department of primary responsibility, particularly for those with multiple appointments. Note that Primary Role is *not* maintained for Graduate Student, Temporary, or Unpaid individuals.

Find in myHR: Appointment Overview, Appointment History, Job Data – Nw Job Data tab

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Salary Administration Unit (SAU)

Summary: The six-digit HR Department ID for the department that maintains the salary budgeting and merit increase planning for a position. This is the department that is responsible for salary planning and merit entry each year. This may be the same department in which the position resides (but is not necessary).

Find in myHR: Position Data – Nw Position Data tab

Salary Admin Plan

Summary: The Salary Admin Plan, combined with the salary Grade, dictate the type of position salary, pay rate range, and merit pool in which the associated job falls.

Find in myHR: Position Data – Description tab, Job Data – Salary Plan tab

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Scheduled Pay Periods

Summary: The number of paychecks an individual receives in a year; typically, "12" for monthly-paid, "26.1" for biweekly-paid, and "0" for unpaid. This number may be less for individuals that are not appointed for a full year.

Find in myHR: Current Salary, Salary History, Position Data – Nw Position Data tab, Job Data – Nw Job Data tab

---

Standard Hours

Summary: For biweekly-paid individuals, indicates the number of scheduled hours in a typical workweek – typically "37.5" or "40" for full-time. For monthly-paid, this is set to "37.5"; for unpaid appointments, "1."

Find in myHR: Position Data – Description tab, Job Data – Job Information tab, Job Data – Nw Job Data tab

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Tenure Status

Summary: *(faculty only)* Represents the tenure status of the employee. May be: "Attained" (A), "Tenure Eligible" (T), or "Non-tenure Eligible" (N).

Find in myHR: Appointment Overview, Appointment History, Employment Info – Employment Info tab, Faculty Tenure

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Time Status

Summary: Represents the total Northwestern full-time status of an individual. The possible values are: "Full-time", "Part time" (between 50%-99% full-time), "Less than part time" (between 1%-49% full-time), and "None" (0% full-time).

Find in myHR: Appointment Overview, Appointment History

Time Worked

Summary: The number of consecutive years/months an individual has been active at Northwestern.

Calculation: The Time Worked is calculated from the Current Hire Date.

Find in myHR: Appointment Overview, Appointment History

University Title

Summary: The official Northwestern title; this is the title tied to a six-digit Job Code and is required to display in the Online Directory for any employee.

Find in myHR: Position Data – Description tab (next to the "Job Code"), Job Data – Job Information tab (next to the "Job Code")

Section 10

myHR Codes

Note: Codes lists on the following pages are current as of 2/1/2017. For the most up-to-date code lists, and for longer codes lists that are not included in this manual, refer to the myHR Admin website at: www.northwestern.edu/myHR/admin/.

POSITION TYPE AND CATEGORY

POSITION TYPE and POSITION CATEGORY codes specify details about the type of Position:

Position Type		Position Category	
FAC	Faculty	ADF	Administrative Faculty
FAC	Faculty	ADJ	Adjunct
FAC	Faculty	CLA	Clinical Assoc/Faculty Assoc
FAC	Faculty	CNT	Contributed Services
FAC	Faculty	COT	Coterminous
FAC	Faculty	EME	Emeritus
FAC	Faculty	END	Named Professorship
FAC	Faculty	HSC	Health Service Clinician
FAC	Faculty	LIB	Librarian
FAC	Faculty	NMF	NMFF
FAC	Faculty	REG	Regular
FAC	Faculty	RES	Research
FAC	Faculty	UNC	University College
FAC	Faculty	VIS	Visiting
NON	Non-Employee	ABF	American Bar Foundation
NON	Non-Employee	AFF	Affiliate
NON	Non-Employee	CHA	Chaplain Affiliate
NON	Non-Employee	COB	Cobra Dependent
NON	Non-Employee	IDP	Id Purposes, non-paid
NON	Non-Employee	IND	Indep Contractor
NON	Non-Employee	NMF	NMFF Member
NON	Non-Employee	NRO	NROTC staff
NON	Non-Employee	PDC	PostDoctorate
NON	Non-Employee	RET	Retiree
NON	Non-Employee	RPK	Research Park
NON	Non-Employee	TRN	Visiting Ungrd Stud- Training
NON	Non-Employee	TRU	Trustee
NON	Non-Employee	VSC	Visiting Scholar
NON	Non-Employee	VSS	Visiting Student
STF	Staff	EXM	Exempt
STF	Staff	NEX	Non-Exempt
STU	Student	GRA	Graduate Non Work Study
STU	Student	GWK	Graduate Work Study
STU	Student	SUM	Summer Session
STU	Student	UNG	Undergraduate Non Work Study
STU	Student	UWK	Undergraduate Work Study

PAY GROUP

PAY GROUP specifies how and when an individual is paid for a particular job record:

Pay Group	
BIR	Biweekly Regular
BIT	Biweekly temporaries
IND	Independent Contractors
LTD	Long Term Disability
MGW	Monthly Graduate Student Payment
MOF	Monthly Faculty Payment
MON	Monthly Staff Payment
NMF	Monthly NMG Payment
OTH	Other (Unpaid)
TRN	Used for Training for Students & POI

PAYROLL STATUS

The PAYROLL STATUS specifies a person's current status at Northwestern:

Payroll Status	
A	Active
D	Deceased
L	Unpaid Leave of Absence
P	Paid Leave of Absence
S	Suspended
T	Terminated

TENURE STATUS

The TENURE STATUS describes a faculty member's current tenure standing:

Tenure Status	
A	Attained Tenure
D	Denied Tenure
T	Tenure Track
P	Pending Tenure Track
N	Non-tenure Eligible
blank	Non-tenure Eligible

Salary Admin Plans

The Salary Admin Plan dictates the type of position salary, pay rate range, and merit pool in which the associated job falls:

Salary Admin Plans	
ACS	Administrative Faculty
EXC	Executives
EXS	Staff Exempt
FAC	Faculty
ITS	Information Technology
LIB	Librarians
NEX	Staff Non-exempt
NIH	NRSA Postdoctoral Fellows
NWU	Unpaid Positions (e.g. Emeritus/Health Service Clinicians)
REF	Research Faculty
RES	Research Staff
STU	Student

Benefit Programs

The Benefit Program indicates the type of benefits in which an employee is currently enrolled. For questions about benefits programs, contact the HR Benefits division.

Benefit Plans	
046	Union 46 Employees-Eligible
399	Union 399 Employees-Eligible
681	Union 681 Employees-Eligible
ACT	Active Employees Benefit Prog
BAC	BIR Active EEs Benefit Prog
BIW	Biweekly Employees-Eligible
CBN	Cobra/Retiree Benefit Program
MTH	Monthly Employees-Eligible
NBE	Non Benefits Eligible Employee
NBN	Not Benefits Eligible
NFT	NMFF Full-Time Faculty
NON	Non Employees (contractors)
NRS	NRSA Post Docs
QAT	Qatar Employees
RET	Retired Employees
STD	STD Ben Pgm
TER	Terminated Employees
TMP	Temporary Employees

Other Code Lists

All code lists are regularly updated and available for search and download on the myHR Administration website at www.northwestern.edu/myHR/admin.

In addition to the codes listed here, these additional larger lists are available on the website:

- Check Address Codes
- HR Department IDs
- Job Codes
- Location Codes
- Payroll Account Codes