

Special Hire (Blackboard) Access has been renamed to Departmental Special Appointments and will be referenced as such in this document. Reference to the PeopleSoft panel itself, will be Special Hire.

**Remember-** For most users, your Departmental Special Appointments will be under a 2<sup>nd</sup> userid that begins with a capital “S” – you will need to login to PeopleSoft HR with this 2<sup>nd</sup> userid to use the Departmental Special Appointments access. There are a few users who have the access under their main user profile, if they do not have any other type of HR access. You cannot log into ULink with your 2<sup>nd</sup> userid, you will need to go to [www.louisville.edu](http://www.louisville.edu) > “My Accounts” (upper right corner) then click on PeopleSoft HR in the resulting pop-up box. When entering the 2<sup>nd</sup> userid, it must be entered as upper-case S followed by your emplid. Your password should always be entered in lower-case. Passwords are normally a default set by Information Technology, if you desire to have a different password, please contact Becky Letcher, however the password must conform to the password standards set by I.T.’s Enterprise Security group (at least 8 characters and consist of alphabetic characters, at least 1 uppercase alphabetic character, 1 number and 1 special character (< > ; and & are not allowed). It will be your responsibility to remember this password and remember, do NOT share your login and passwords with others.

When and why to use or not use the Departmental Special Appointments Process:

- Instructors need access before they are reappointed in the next semester. These people normally will have an existing EMPLID.
- Instructors have not been hired through the university payroll system yet. These people need to be researched to see if an EMPLID exists for them.  
**NOTE:** These Special Appointments will be given access to Blackboard, but will be unable to post to their class until they are actually in pay status and are listed as the instructor of record.
- Instructors that are not paid through the university payroll system, may fall into one of the following categories:
  - Gratis Faculty, appointments are currently being added to the system, by the Medical School Dean’s office (Toni Corbett). All Gratis appointments must be approved by the Board of Trustees.
  - ROTC, IESL, and other joint programs with Western Kentucky University, etc. The department must request a Sponsored Account for those individuals, via I.T.’s website: <https://louisville.edu/it/forms/acntforms/sponsreq.html>

What information do you need to get started: **If you already have an EMPLID, skip to page 9.**

**MUST have:**

- Always ask if there is an existing EMPLID – if the hire has attended UofL or is a former employee they may know their EMPLID. (If they don’t know it, they should appear in your search/match).
- First name and last name (correct spelling) – It is also very important to have the middle name or at least the middle initial.
- Date of birth.

**Would be good to have:**

- Home address – If they give you a **mailing address** you will should note that, IF you have to create a new EMPLID. Foreign addresses should NOT be entered as a mailing address.

**Getting Started**

**Step 1:** - You must do a complete search match:

To start, click Search for Matching Persons

- Enter the entire last name then hit tab key (*tab*) – system will capitalize the name when you TAB out of the box
- Enter the first letter of the first name then hit (*tab*) key
- Enter the Date of Birth
- Now click on the *Search* Button

On the results page – try to be an “EMPLID Detective” BE SURE TO VIEW ALL or to check other pages for more possibilities.

Are there matches to your hire’s Date of Birth – the first and last name (with or without a DOB)? Look for names similar to your employee’s name. Robert may show as “Bob”, William may show as “Bill”, Rebecca may show as “Becky”, etc.

**Search Results**

Search Type: Person  All Hoc Search

Search Parameter: PSDBL\_SAVE\_TIME HR Auto Run at Save Time

Result Code: PSCS\_TRAD\_MASK CS\_Pers Traditional Result Mask

Search Results Summary

Number of ID's Found: 7

Search Order Number: 50 Name Only

[Return to Search Criteria](#)

EmpID	Rate Type	Name Effective Date	First Name	Middle Name	Last Name	National ID	Date of Birth	Gender	Campus ID	Person Organizational Summary	Relations With Institution
3000937	PRI	03/05/2014	BSA	appHR	Test	****1000		M	BB****	Person Organizational Summary	Relations With Institution
3000835	PRI	02/01/2014	Blackboard	New	Test	****2233	01/01/1980	F	BB****	Person Organizational Summary	Relations With Institution
3000920	PRI	01/01/2014	BSA	testB5	Test	****1000	01/01/1980	F	BB****	Person Organizational Summary	Relations With Institution
3000919	PRI	01/01/2014	BSA	testB4	Test	****1000	01/01/1980	M	BB****	Person Organizational Summary	Relations With Institution
3000916	PRI	01/16/2014	Betty	SBA	Test	****1000	01/01/1978	F	BB****	Person Organizational Summary	Relations With Institution
1812787	PRI	08/05/2011	Reidley	W	Tester		05/02/1981	M		Person Organizational Summary	Relations With Institution
1786736	PRI	02/14/2011	Bethany	N	Tester		01/12/1985	F		Person Organizational Summary	Relations With Institution

If you do not find an existing EMPLID for your hire, then you can create one by following these steps: Click “Search Match / Add a Person” on the top bread-crumb menu – this time you will click “Add Person” button in the “Step 2 – Add New POI” box

**Search Match / Add a Person**

Step 1 - Search Match

[Search for Matching Persons](#)

Step 2 - Add New POI

[Add Person](#)

Once here, **NEVER** take the word NEW out – if you do for some reason, DO NOT retype the word NEW, just start over by clicking on “Search Match / Add a Person” on the top bread-crumbs menu, then click “Add Person” button in the “Step 2 – Add New POI” box

Favorites | Main Menu > UoFL Custom Menu > UL HR General - New > UL Special Hire > Search Match / Add a Person

## Personal Data

Find an Existing Value   Add a New Value

Empl ID: NEW x

Add

Click: “Add” button

Click: “Add Name” button

Favorites | Main Menu > UoFL Custom Menu > UL HR General - New > UL Special Hire > Search Match / Add a Person

Biographical Details | Contact Information | Regional | Organizational Relationships

Person ID: NEW

Name		Find   View All   First   1 of 1   Last	
*Effective Date:	01/16/2014		
*Format Type:	English		
Display Name:		Add Name	
Biographic Information			
Date of Birth:		0 Years	0 Months
Birth Country:	USA	United States	
Birth State:			
Birth Location:		<input type="checkbox"/> Waive Data Protection	
Biographical History		Find   View All   First   1 of 1   Last	
*Effective Date:	01/16/2014		
*Gender:	Unknown		
*Highest Education Level:	A-Not Indicated		
*Marital Status:	Unknown	As of:	
Language Code:			
Alternate ID:			

Name:

- Do not enter Prefix or Suffixes
- Use upper and lower case
- It is important to enter a middle name or at least a middle initial, otherwise the employee will have a userid with the number 0 for their middle name.

**Edit Name**

**English Name Format**

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Display Name: Leroy Test

Formal Name: Leroy Test

Name: Test,Leroy B

Confirm the name > Click “Refresh Name” button and then click “OK” button.

Favorites | Main Menu > UofL Custom Menu > UL HR General - New > UL Special Hire > Search Match / Add a Person

\*Effective Date:

\*Format Type:

Display Name: Leroy Test

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**Biographic Information**

Date of Birth:   0 Years 0 Months

Birth Country:   United States

Birth State:

Birth Location:   Waive Data Protection

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**Biographical History** Find | View All First 1 of 1 Last

\*Effective Date:

\*Gender:

\*Highest Education Level:

\*Marital Status:  As of:

Language Code:

Alternate ID:

Full-Time Student

Only enter the items below that you **100% know are correct**

- Date of Birth
- Gender
- Highest Education Level

Click "Contact Information" tab > "Add Address Detail" link

Person ID: NEW

Address Type	As Of Date	Status	Address	Actions
Home	01/16/2014	A		<a href="#">Add Address Detail</a>

**Address History**

Address Type: Home

*Effective Date:	Address:
03/26/2014	

Country: USA

\*Status: A

[Add Address](#)

OK Cancel Refresh

Click: "Add Address" link

Use the "Look Up" for the County – ONLY enter county if you are **100% certain** the county is correct. Also, you can only enter counties for Kentucky addresses.

Country: United States [Change Country](#)

Address 1: 307 Higher Dr

Address 2: Apt #2

Address 3:

City: Louisville State: KY Kentucky

Postal: 40207

County: JEF Jefferson

OK Cancel

Click: "OK" button, then when you have returned to Address History panel, click the "Refresh" button

Enter **UofL Work** Phone, if you know what that number will be for your person.

*Phone Type	Telephone	Extension	Preferred
Uof L Work	852-5643		<input type="checkbox"/>

Click: "Save" button

Click on the "Organizational Relationships" Tab

Click > "Add Relationship" button

[Favorites](#) > [Main Menu](#) > [UofL Custom Menu](#) > [UL HR General - New](#) > [UL Special Hire](#) > [Search Match / Add a Person](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | **[Organizational Relationships](#)**

**Leroy Test** Person ID: NEW

Choose Org Relationship to Add

**Person of Interest**      UL Person of Interest

Select Checklist Code:      Add Person of Interest Inst.

**Add Relationship**

Save Notify Refresh Add Update/Display Include History Correct History

Click: "Save" button

If you did not enter National ID/SS # or an address, you will get a warning – that is not a problem.

Click: "OK" button

**Add a POI Relationship**

**LeRoy Banks** Person ID: 3000042

Person of Interest Type:      UL Person of Interest

OK Cancel Apply

**Click: OK**

Be sure to write down your new EMPLID.

Click the “Save” button on this page. You now need to enter your new person on the Special Hire panel.

On the bread-crumb menu, click on “UL Special Hire”

Favorites Main Menu > UofL Custom Menu > UL HR General - New > **UL Special Hire** > Search Match / Add a Person

Biographical Details Contact Information Regional **Organizational Relationships**

**Lerooy Test** Person ID: 3000041

Choose Org Relationship to Add

Person of Interest UL Person of Interest

Select Checklist Code: Add Person of Interest Inst.

Add Relationship

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

Since you just created a **NEW** EMPLID for a person, you will not need to check existing job data information and you will go straight to the “UL Special New Hire” panel. Skip to page 12 in this document.



## Entering Hires that are Special Department Appointments (no pay status)

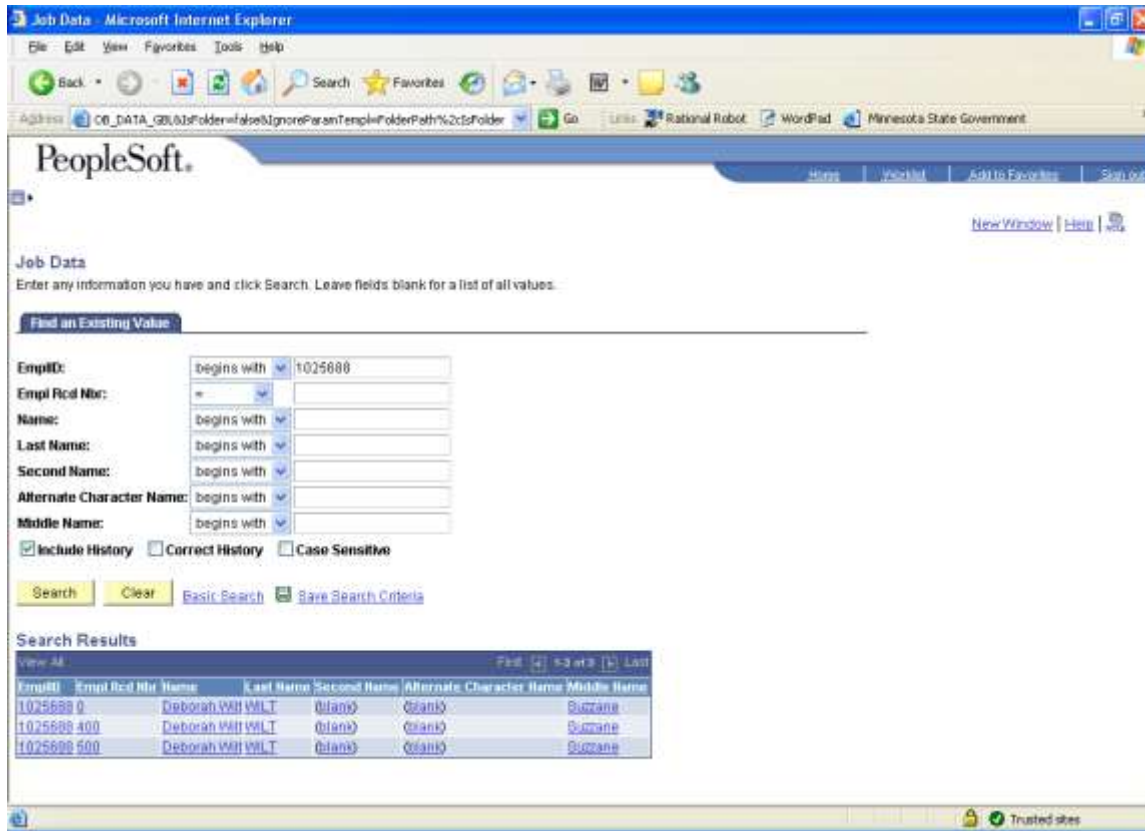
Before you enter anyone for a Special Hire – be sure to check their existing Job Data Record

[How to determine the Employee Status using Workforce Administration](#)

**PATH: Workforce Administration>Job Information>Job Data**

The screenshot shows the 'Job Data' search page in the PeopleSoft system. The page header includes the University of Louisville logo and the text 'UNIVERSITY OF LOUISVILLE'. Below the header, there are four 'USER' labels. The breadcrumb navigation shows 'Workforce Administration > Job Information > Job Data'. The main heading is 'Job Data', followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. Below this is a 'Search Criteria' section with a dropdown arrow. The search criteria include: 'Empl ID:' with a 'begins with' dropdown and a text input field; 'Empl Record:' with an '=' dropdown and a text input field; 'Name:' with a 'begins with' dropdown and a text input field; 'Last Name:' with a 'begins with' dropdown and a text input field; 'Second Last Name:' with a 'begins with' dropdown and a text input field; 'Alternate Character Name:' with a 'begins with' dropdown and a text input field; and 'Middle Name:' with a 'begins with' dropdown and a text input field. At the bottom of the search criteria are three checkboxes: 'Include History' (checked), 'Correct History' (unchecked), and 'Case Sensitive' (unchecked). Below the search criteria are four buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Enter the EMPLID, checkmark – “*Include History*” box then click “*Search*” button. We include this step to see all history for this person to verify the dates of access.



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

**Find an Existing Value**

EmplID: begins with 1025688  
 Empl Rcd Nbr:   
 Name: begins with   
 Last Name: begins with   
 Second Name: begins with   
 Alternate Character Name: begins with   
 Middle Name: begins with

Include History  Correct History  Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Search Results**

EmplID	Empl Rcd Nbr	Name	Last Name	Second Name	Alternate Character Name	Middle Name
1025688 0		Deborah WIL WILT	WILSON	WILSON	WILSON	Suzanne
1025688 400		Deborah WIL WILT	WILSON	WILSON	WILSON	Suzanne
1025688 500		Deborah WIL WILT	WILSON	WILSON	WILSON	Suzanne

If there are multiple Empl Rcd numbers displaying on the search panel, each one designates a different type of record in the system. The various values are as follows:

- Empl Rcds 0, 1, 2, etc indicate that the person has been processed in payroll at some point in time.
- Empl Rcd 200 indicates that the person is being billed for their benefits directly. These records generally do not have security access.
- Empl Rcd 300 indicates the person has a Gratis appointment.
- Empl Rcd 400 indicates that the person has been processed with a “Departmental Special Appointment”.
- Empl Rcd 500 indicates that the person has received a student refund. These records do not control any security access.

Any of these records could have termination dates in the past indicating that the appointment is no longer active, and the security has been removed.

If there is an existing 400 Empl Rcd – bring it up and check the start and termination dates. Be sure not to enter dates that may fall within the dates already shown for this “Departmental Special Appointment”.

Job Data - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: CB\_DATA\_GBL&jsFolder=fals&ignoreParamTempl=FolderPath%2c1Folder

Home | Worklist | Add to Favorites | Sign Out

New Window | Help | Customize Page

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Test Test EMP ID: 1436292 Empl Rcd #: 0

Work Location

HR Status: Inactive Payroll Status: Terminated

Effective Date: 09/02/2004 Sequence: 1 \*Job Indicator: Primary Job

Action / Reassoc: Termination

Last Start Date: 09/02/2004 Termination Date: 09/01/2004

Expected Job End Date

Last Date Worked: 09/01/2004  Override Last Date Worked

Position Number: 00000010 Assoc Professor Position Entry Date: 09/02/2004

Position Management Record

Regulatory Region: USA United States

Company: UL University of Louisville

Business Unit: UOFL1 Standard BU

Department: 2012000102 ASS Biology Department Entry Date: 09/02/2004

Location: BELKNAP Belknap Campus

Establishment ID: 001 University of Louisville-Belkn

Date Created: 09/02/2004

Job Data Employment Data Examine Distribution Benefits Business Distribution

Done Trusted sites

If the employee's Status is **Active**, review the dates to confirm that the person will have an active Job Data record for the entire semester. *Please remember that Special Hire access is needed in order to enter the grades at the end of the semester, **ONLY** if they will not have an active job data at that time.*

If the employee's Status is **Terminated (or anything other than Active)**, use the Special Hire panel. You may also know that the Instructors pay status will be terminated, and you don't want them to lose Blackboard and Outlook access – you should create the Departmental Special Appointment on the Special Hire panel. Continuing Instructors should always be given a 2-year appointment.

Special Hire entries:

You should be logged into PeopleSoft HR.

Navigation = "Main Menu > UofL Custom Menu > UL General – New > UL Special Hire > UL Special New Hire"

If you are using an existing EMPLID - enter your person's EMPLID then click "Search" button.

UL Special New Hire

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

Find an Existing Value **Add a New Value**

Search Criteria

Empl ID: begins with 1025688

Position Number: begins with

Begin Date/: =

End Date: =

Include History

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

Search Results

Empl ID	Position Number	Begin Date/ End Date
1025688	30000010	01/01/1998 02/01/2004
1025688	30000010	07/01/2005 09/01/2005
1025688	30000010	07/11/2007 07/01/2009
1025688	30000050	04/27/2012 05/01/2012
1025688	30000090	06/30/2005 09/01/2005

Be sure you review existing Special Hire start and end dates – do NOT enter new dates that will overlap existing dates.

If your 'emplid only' search comes up blank or when you are ready to enter new begin/end dates for your instructor, click on the "Add a New Value" tab.

Favorites Main Menu > UofL Custom Menu > UL HR General - New > UL Special Hire > UL Special New Hire

### UL Special New Hire

Find an Existing Value Add a New Value

Empl ID:

Position Number:

Begin Date:  31

End Date:  31

Add

Enter the Emplid and position number.

Position numbers for each department were created for these Special Appointments. Your Position Number will always be the same for any instructor you enter for that particular department. It will start with a 3\_\_\_\_\_ and will always be eight digits.

Begin Date should always be current date

End date – cannot be longer than two years – on continuing Part-time Instructors, you should always give them a two-year appointment (ex: if begin date is 04/01/2014, end date would be 03/31/2016).

If you are using the “Departmental Special Appointment” to setup a Temporary Job Data record, just to get Blackboard & Outlook advance access for an incoming employee, before Payroll actually completes the pay status Job Data record. You should set the appointment end date, up to 45 days after their true start date on the “Departmental Special Appointment” (Special Hire) panel. Once Payroll has entered the employee’s actual hire job data record, it will override the Departmental Special Appointment record and show their actual job title in Outlook.

Click “Add” button.

UBM

Empl ID: 3000027      Name: Test,Mega L

Position Number: 30000012      Blackboard Access

Start Date: 03/26/2014

End Date: 03/24/2016

Last Update User ID:

Last Update Date/Time:

Save    Notify    Add    Update/Display    Include History

**STOP** and verify the name next to the emplid and that the dates are correct.

Click: "Save" button.

If you have any questions, you can call or email, Deb Wilt: [deb.wilt@louisville.edu](mailto:deb.wilt@louisville.edu) – 856-5643

If you are unable to reach me, you may also contact, Becky Letcher: [becky.letcher@louisville.edu](mailto:becky.letcher@louisville.edu)  
852-4330.

There is a batch process that creates the actual 400 job data records and it runs after 5:00 PM each day. The new Job Data, Blackboard Access and Outlook accounts should appear the next morning.

## HR University Report - View Department Special Appointment by department:

Access to this report, requires that you have HR University Reports access.

Log into ULINK > Click "Faculty/Staff" tab > Click on "University Reports" link in the University Reports box.

You will have to log in again OR go directly to University Reports login page at

<http://reports.louisville.edu/BOE/BI> (make sure that "Authentication:" box contains the word, LDAP)

When the folder list appears in the "My Documents" box, expand "Human Resources" folder and double-click the "General UBA Reports" folder. In the "Details" box, you should see "Dept Special Appts (BBA) Term Report", double-click this reportname to run the report.

The screenshot displays the University of Louisville HR University Reports interface. At the top, there are navigation tabs for 'Favorites' and 'University Reports'. Below this is the University of Louisville logo and a 'Welcome:' message. The main interface is divided into two panes: 'My Documents' and 'Details'.

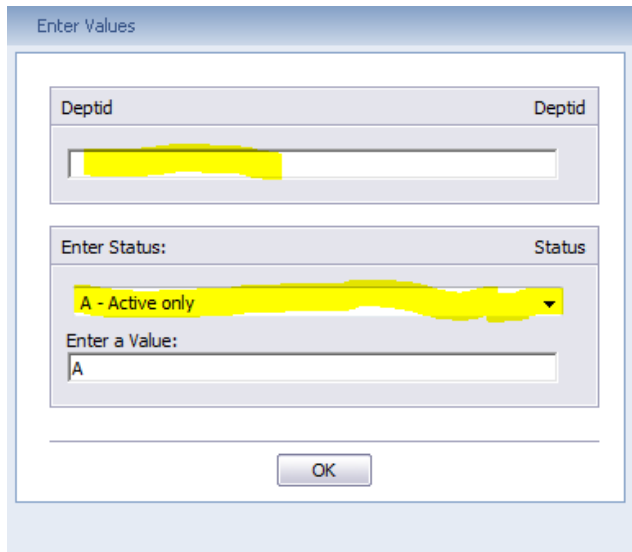
**My Documents Pane:** Shows a folder tree structure. The 'Human Resources' folder is expanded, and the 'UBA' folder is highlighted. Under 'UBA', there are several sub-folders, including 'General UBA Reports', which is also highlighted.

**Details Pane:** Shows a list of reports. The report 'Dept Special Appts (BBA) Term Report' is highlighted in yellow. Other reports in the list include 'Active Position Utilization', 'Criminal Background Check - Dept', 'Criminal Background Check - Speedtype', 'Ethnicity Recanvas Audit Report', 'HR 667 Performance Appraisal Metrics', 'HR-Job Code Listing - Run to Excel', 'PAY-000 Deceased Employees Report Version 4', 'PAY-211 Terminated Employees Report', 'PAY-234 Employment Verification Report', 'PAY-662 Service Date Listing', 'PAY-702 International Employees by Visa Type and EmplID', 'PAY-901 Check Listing for Pay Period Ending', 'Performance Appraisal - Overall Individual Rating', 'SHP-521 Training Completion Report', and 'SHP-522 Training Requirement Report'.

In the “*Enter Values*” box, enter your department id, and select one of the following statuses from the drop-down menu:

A – Active only (to view only appointments)

\* - All (to view all appointments, both active and inactive)



The screenshot shows a dialog box titled "Enter Values". It contains two main input sections. The first section is labeled "Deptid" and has a text input field with a redacted value. The second section is labeled "Enter Status:" and "Status". It features a dropdown menu with "A - Active only" selected and highlighted in yellow. Below the dropdown is a text input field labeled "Enter a Value:" containing the letter "A". At the bottom center of the dialog is an "OK" button.

Click “*OK*” button to run the process and obtain your report.