

Updating the HR Employee Profile - PeopleSoft Financials

When an employee is added to PeopleSoft as a new hire *or* when their employee data changes with an internal job change, transfer, or promotion for example, their HR Employee Profile must be validated with their current organizational data *before* an expense report can be initiated.

To update an employee profile, navigate to [PeopleSoft Financials](#) in the web browser of your choice, and from the main menu onto **\Travel and Expenses \Manage Employee Information \Update Profile**.

Enter the employee's EMPL ID# (7-digits) and click **Search**. All updates are to be made only on the **Organizational Data** tab.

Organizational Data:

The screenshot displays the 'Update Profile' interface for Anthea Vadasz. The 'Organizational Data' tab is selected. The 'Expenses Processing Data' section shows 'Valid for Expenses' as 'No' and a 'Validate' button. The 'Reason for Status' is 'Invalid Business Unit'. The 'HR Information' section includes 'Employee Status' (Active), 'Hire Date' (06/12/2017), '*GL Unit' (NAUBU), and '*Department' (4030010). The 'Supervisor Information' section shows 'ID' (1507702) and 'Name' (Markey, Kristi Diane). The 'Default ChartField Values' table lists fields like *GL Unit, Fund, Program, SubDept, Affiliate, Fund Affil, and Dept. The 'Cash Advance Level' section has 'Business Unit' selected with a value of 5,000.00 USD. The 'Expense Role' section includes a description and an 'Expense Processing Role' dropdown. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Add'.

HR Information:

Department: Enter the employee's Department ID (first 7-digits of their speedchart) that they most commonly expense from. If a profile has multiple pages, the Department ID must be entered on *all pages* of the profile, PRIOR to saving.

**The *Department* field may contain a 5-digit number, this is the employee's HR Dept ID and must be replaced with the 7-digit Department ID as indicated above. You cannot use a grant project ID *or* the Department ID of the grant, it must be a local or state Department ID. Contact the local fiscal oversight designee (LFO) who approved the ESC case and request a local or state Department ID. Reassure them that this update will NOT change the employee's budgeted funding source. **

Default Profile Check Box: This box is typically checked. If a profile has multiple pages, the default must be set to the page where the Employee Status is *Active*.

Click SAVE: After entering the Department ID on all pages and you have selected the active Default Profile, click SAVE.

Validate Button: Click the *Validate* button to complete the process.

Valid for Expenses: Once you have clicked the Validate button, this field will change from No to Yes.

If you receive an error, submit an [Employee Service Center](#) (ESC) case - **General Finance\Financial Administration and Technical Support** request, with inquiry type: *Travel Profile Update* and upload a screen shot of the error.

Profiles of Employees with Student Pages: For student employees or for employees that were once an NAU student, their **last** profile page will be blank in the *Supervisor Information* section and the *Department* field will show SF 1000, see image below.

****SF 1000** is the student reimbursement Department ID for Student and Departmental Account Services (SDAS) and must be replaced with the 7-digit Department ID as indicated on page 1.

Employee Data | **Organizational Data** | **User Defaults** | **Bank Accounts** | **Corporate Card Information**

Rukhshana Karimi

Expenses Processing Data Find | View All First 2 of 2 Last

Valid for Expenses: No Default Profile
 Ignore Authorized Amounts

Reason for Status: Invalid Business Unit

HR Information

Employee Status: Active
Hire Date: 05/05/2022
GL Unit: NAUBU Northern Arizona University
Department: SF1000
Hours Per Period: Use Business Unit Default

Supervisor Information

ID:
Name:
Designated Approver:

Default ChartField Values Personalize | Find First 2 of 2 Last

GL Unit	Fund	Program	SubDept	Affiliate	Fund Affil	Dept
NAUBU						SF1000

Cash Advance Level

Business Unit 5,000.00 USD
 Specific Amount
 None

Verifying Employment Status in PeopleSoft LOUIE

To verify an individual’s employment status with the university, navigate to [PeopleSoft LOUIE](#) in the web browser of your choice, from the menu click the **Manager\Department Dashboard** tile then the **Position Query** tile; if using the Classic Home navigation select **\Self Service \Position Query**.

Select Job Information Enter the employee’s EMPL ID# (7-digits) and click **Submit**.

If you do not know the EMPL ID, click the magnifying glass at the end of the field to search by name, then click **Submit**.

Position Query

Use this page to review positions, position funding and employees.

Funding
PF Department
Fund
Project

Job Information
Position #
HR Department #
Empl ID 6257041 Karimi,Rukhshana Include child departments
Reports To
Position Number

Position Information Provided:

EMPL ID & Employee’s Full Name

Position Number & Job Code

Job Title

HR Department Code & HR Department Name

Position Funding Speedchart Information - Department, Fund, Program, Project, % of Distribution

Reports To Supervisor – Name, Job Title, Position Number

NOTE: If the Reports To Supervisor is *vacant*, a Reports To change request must be submitted by the employee’s department LFO and be fully executed before the HR Employee Profile can be updated.