CSU | **The California State University**
SYSTEMWIDE HUMAN RESOURCES

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Date:	June 5, 2012	**Code:**	**TECHNICAL LETTER** **HR/EHDB 2012-01**
To:	Payroll Managers Human Resources Officers Associate Vice Presidents/Deans of Faculty	**Reference:**	**HR 2011-01**
From:	Evelyn Nazario Assistant Vice Chancellor Human Resources Management		

Subject: <u>HR Standardization: Employment History Database Clean-Up Requirements – Phase 1: Demographic Data</u>

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<u>Overview</u>

Audience:	Human Resources Officers and/or HR Professionals, Payroll Managers and/or Payroll designees, Academic Personnel Managers and/or Academic designees responsible for employment history database integrity in Oracle/PeopleSoft and PIMS.
Action Items:	Campuses must assign designees that will be responsible for coordinating the database clean-up project. Campuses must review and correct inaccurate or invalid data elements and/or values in the Oracle/PeopleSoft and PIMS employment history databases by July 2012.
Affected Employee Groups/Units:	

<u>Summary</u>

In support of HR standardization requirements, demographic-related data elements in the Oracle/PeopleSoft and PIMS HR employment history databases must be reviewed to ensure that they are being utilized for the same purpose and that the values established are being consistently and uniformly applied in the respective system. Individuals responsible for reviewing and correcting employment history information should read the remainder of this letter.

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The HR Standardization Project was re-introduced in coded memo HR 2011-01. The project purpose is to establish systemwide consistency and uniformity in HR databases and related business processes and programs in support of two major HR initiatives: implementation of a single HR database in Oracle/PeopleSoft, known as the Common Human Resources (CHRS) project, and in response to the State Controller's Office (SCO) MyCalPAYS project, formerly known as the 21st Century Project.

An Employment History Database (EHDB) committee was established in April 2011, comprised of campus and Chancellor's Office subject matter experts in the Oracle/PeopleSoft and PIMS (legacy) employment history databases. The committee goal is to accomplish systemwide HR database standardization and data integrity, divided into two major phases: (1) to define, standardize, clean-up and validate associated fields, elements and values for "demographic" data in the Oracle/PeopleSoft and PIMS databases, and (2) to standardize, clean-up and validate transactional data and associated fields, elements and values that comprise the official employment

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roster. The official employment roster provides the historical record of an individual's employment pertinent to appointment, status, salary and other employment related information.

In September 2011, the committee developed and distributed a systemwide survey to determine campus utilization of proposed core demographic-related data elements and values in the Oracle/PeopleSoft HR database. Core fields and values are defined as CSU-designated fields and elements maintained by CMS baseline and the campuses (which may or may not include all Oracle/PeopleSoft-delivered values) in support of CSU policy, collective bargaining, external entity requirements and established guiding principles. The survey results helped the committee assess the data fields tracked by the campuses (e.g., if the fields are tracked differently), and provided an estimate of how much clean-up activity may be required. This information was acknowledged by the CHRS Steering Committee who has given the approval to move forward with this phase of the data cleansing project.

As a result, this Technical Letter implements the requirement to standardize, clean-up and validate demographic-related data in the Oracle/PeopleSoft HR database and to correct and update corresponding elements and values as appropriate, in the PIMS employment history database. Clean-up efforts will be accomplished with the assistance of provided scripts and other tools for the Oracle/PeopleSoft HR database, and for PIMS, we have requested the assistance of the SCO's automated and manual processes. The scope of the validation extends to all active, on-leave and separated records in the respective Oracle/PeopleSoft and PIMS HR databases. The timeline anticipated for clean-up activity is approximately two months, to conclude by no later than August 2012.

For your reference, Attachment A identifies the demographic-related data elements. This document has two tabs: the Attachment A – Section A identifies "core" Oracle/PeopleSoft demographic-related data elements. Attachment A – Section B identifies demographic data elements that may be considered as future core requirements in support of the State Controller's Office MyCalPAYS initiative and/or potential HR policy requirements. This attachment also identifies items that require address by the CHRS Design Team for the data warehouse. This information was previously shared with campus management and staff responsible for employment history database integrity at Human Resources Management's May 3, 2012 "Preview Opportunity: Employment History Database Clean-up Requirements – Phase 1: Demographic Data" teleconference.

As indicated during the teleconference, campuses are requested to assign a designee who will be responsible for communicating, coordinating and facilitating campus project tasks as prescribed by the Chancellor's Office. The campus designate will work with affected departments and staff responsible for validating data in the Oracle/PeopleSoft and PIMS employment history databases at their respective campus. Campus designee contact information should be submitted to our Human Resources Management e-mail repository via HRAdmin@calstate.edu by June 15, 2012. A teleconference will be scheduled with the campus designees during the week of June 18, 2012 to discuss details of the clean-up requirements and to answer any questions that the designee may have. Input provided at the May 3rd teleconference has already proven to be helpful for this purpose. An announcement of the teleconference details will be forthcoming.

Questions regarding this Technical Letter may be directed to Systemwide Human Resources Management (562) 951-4411. This Technical Letter is also available on Human Resources Management's Web page at: http://www.calstate.edu/HRAdm/memos.shtml.

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Attachment

ELEMENT NAME	DEFINITION
DEGREE AND LICENSE INFORMATION	
Degree Country	The country in which the degree was obtained
Degree Date Acquired	Indicates the date the degree was granted.
Degree Graduate Indicator	An indicator whether or not the degree was obtained.
Degree Institution	Indicates the institution of higher learning at which the employee earned their degree.
Degree Major	Description of degree major.
Degree Major Code	A code representing the employees major.
Degree Obtained	An abbreviation of the degree the employee obtained.
Degree School Code	The code for the school granting the degree.
Degree School Name	Name of the school who granted the degree.
Degree State	State of the school who granted the degree.
Degree Terminal Indicator	Denotes the highest degree commonly attainable within a given discipline. For most academic disciplines, the terminal degree is the doctorate.
Education Level	Indicates the level of education or highest certificate reported by the employee or the campus.
License or Certificate Code	Identifies the expiration date of a license, credential or other certification that an employee must possess in order to meet minimum job qualifications and/or qualify for continued employment in a particular class. Also used to identify license requirements when the employee is appointed to or occupies one of the Management Personnel Plan classes.
License or Certificate Country	Indicates country the license or certificate was issued in.
License or Certificate Expiration Date	Identifies the expiration date of a license, credential or other certification that an employee must possess in order to meet minimum job qualifications and/or qualify for continued employment in a particular class. Also used to identify license requirements when the employee is appointed to or occupies one of the Management Personnel Plan classes.
License or Certificate Issue Date	Date on which the required license was issued.
License or Certificate Issued By	Indicates institution issuing license or certificate.
License or Certificate Number	Required license number.
License or Certificate State	Indicates the state license or certificate was issued in.
License or Certificate Verified Indicator	Indicates whether or not proof of required license was received.
EMPLOYEE NAME, ADDRESS, AND CONTACT INFORMATION	
Employee Home Address - City	The city portion of the address at which an employee resides. This may be different from the employee's mailing address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Employee Home Address - State	The state portion of the address at which an employee resides. This may be different from the employee's mailing address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Employee Home Address (Line 1) - Street or P.O. Box	The address at which an employee resides. This may be different from the employee's mailing address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.

ELEMENT NAME	DEFINITION
Employee Home Address (Line 2)	The Line 2 address at which an employee resides if additional space is needed, otherwise blank.
Employee Home Address (Line 3)	The Line 3 address at which an employee resides, if additional space is needed, otherwise blank.
Employee Home Address - Zip Code	The zip code portion of the address at which an employee resides. This may be different from the employee's mailing address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Employee Mailing Address - City	The city portion of address at which an employee would like to receive mailings from the campus, Chancellor's Office and the State Controller's Office (SCO). This is used in conjunction with Employee Mailing Address - Street, State and Zip Code. This may be different from the employee's home address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Employee Mailing Address - State	The state portion of address at which an employee would like to receive mailings from the campus, Chancellor's Office and the SCO. This is used in conjunction with Employee Mailing Address - Street, City and Zip Code. This may be different from the employee's home address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Employee Mailing Address (Line 1) - Street or P.O. Box	The address at which an employee would like to receive mailings from the campus, Chancellor's Office and the SCO. This is used in conjunction with Employee Mailing Address - City, State and Zip Code. This may be different from the employee's home address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Employee Mailing Address (Line 2)	The Line 2 address at which an employee would like to receive mailings from the campus, Chancellor's Office and the SCO if additional space is needed, otherwise, blank.
Employee Mailing Address (Line 3)	The address at which an employee would like to receive mailings from the campus, Chancellor's Office and the SCO if additional space is needed, otherwise blank.
Employee Mailing Address - Zip Code	The zip code portion of address at which an employee would like to receive mailings from the campus, Chancellor's Office and the SCO. This is used in conjunction with Employee Mailing Address - Street, City, State. This may be different from the employee's home address. An employee may elect to have their address withheld from release. Refer to Address Withheld Indicator for additional information.
Email Address - Campus	Email address on campus
Email Address - Preferred Flag	Indicator for the email address through which the employee prefers to be contacted.
Email Address - Type	The type of Email Address.
Emergency Contact - Name	First and last name of the emergency contact.
Emergency Contact - Address Line 1	Street Address or P.O. Box of emergency contacts address.
Emergency Contact - Address Line 2	Second line of emergency contact's address, if any.
Emergency Contact - Address Line 3	Third line of emergency contact's address, if any.
Emergency Contact - Address Type	Type of address for emergency contact.

ELEMENT NAME	DEFINITION
Emergency Contact - City	City of the emergency contact's address.
Emergency Contact - Country	Country of the emergency contact's address.
Emergency Contact - Country Code	Abbreviation for the country of the emergency contact's address.
Emergency Contact - Postal Code	Zip code for the emergency contact's address.
Emergency Contact - Primary Contact	Indicates the primary contact.
Emergency Contact - Relationship to Employee	Relationship of emergency contact to employee.
Emergency Contact - Same Address as Employee	Indicates whether or not the employee's and emergency contact's addresses are the same.
Emergency Contact - Same Phone as Employee	Indicates whether or not the employee's and emergency contact's phone numbers are the same.
Emergency Contact - State	State of the emergency contact's address.
Emergency Contact - Phone	Phone number for emergency contact.
Emergency Contact - Phone Type	Type of phone for emergency contact.
Name - First	This is the employee's legal first name.
Name - Last	This is the employee's legal surname.
Name - Middle	The employees middle name or middle initial.
Name - Preferred	The first name by which the employee would like to be addressed by. This does not replace the requirement to capture the employees legal name. See Name - First.
Name - Prefix	Prefix selected by the employee.
Name - Suffix	This is the employee's legal suffix, if any.
Phone - Campus	Employee's phone number on campus.
Phone - Home	Employee's home phone number.
Phone - Preferred Flag	Indicates preferred phone number.
Phone - Type	Indicates the type of phone number.
	EMPLOYEE PERSONAL INFORMATION
Birth Date	The employee's date of birth.
Date of Death	The date the employee is deceased.
Employee ID	Unique ID automatically assigned by PeopleSoft for each employee per campus. This represents a non confidential ID that can be used for reporting to outside entities for unique identification.
Ethnic Group	A code that identifies the employee's ethnicity.
Marital Status	The employees marital status.
Marital Status Date	Date of marriage.
Military Discharge Date	Date on which the employee was discharged from the U.S. military.
National ID	This is the unique 9-digit number assigned by the Social Security Administration (SSA), or the interim number assigned by the SCO pending assignment of official number by the SSA. Because the social security number (SSN) is the sole employee identifier for tax reporting purposes, it is required to be collected and forwarded to the SCO.
Sex	A code that identifies the employee's gender.

ELEMENT NAME	DEFINITION
Veteran Status	This field is used for affirmative action and Federal Contractor Veterans' Employment reporting requirements. For additional information, refer to Technical Letter HR 2008-12.
	EMPLOYEE CITIZENSHIP AND VISA PERMIT DATA INFORMATION
Citizenship Country	The employee's country of citizenship
Citizenship I-9 Date	Date the I-9 was complete.
Citizenship - I-9 Reverification Date	Date the I-9 was reverified.
Citizenship Status	Status of citizenship.
Eligible to Work in U.S.	Indicates if the employee is eligible to work in the U.S.
Visa/Permit Country	The country granting the visa/work permit.
Visa/Permit Date Issued	Date on which visa/work permit was issued.
Visa/Permit Effective Date	Effective date of the associated vis/work permit data.
Visa/Permit Entry Date	Date the employee entered the country.
Visa/Permit Expiration Date	Date on which visa/work permit expires.
Visa/Permit Issuing Authority	Agency that issued the visa/work permit.
Visa/Permit Number	Visa/work permit number assigned.
Visa/Permit Place Issued	Place where visa/work permit was issued.
Visa/Permit Status	Status of visa/work permit.
Visa/Permit Type	Identifies the type of visa held by a noncitizen employee.

ELEMENT NAME	DEFINITION
FUTURE DEMOGRAPHIC DATA ELEMENTS **(This section provides a list of fields that may be considered as a future core requirement in preparation for the MyCalPAYS initiative and potential HR policy requirements)**	
Disabled Indicator	Indicates whether or not the employee identified him/herself as disabled.
Tax, Additional Amount Federal	The additional amount of money to withhold for federal income tax.
Tax, Additional Amount State	The additional amount of money to withhold for state income tax.
Tax, Allowances - Federal	The number of regular withholding allowances to be applied for computing federal tax.
Tax, Exempt Withholding	Indicates if employee is exempt from federal and state income tax.
Tax, Marital Status Federal	Marital status for federal tax purposes.
Tax, Marital Status State	Marital status for state tax purposes.
Tax, Regular Allowance - State	The number of regular withholding allowances to be applied for computing state tax.
Tax, Special Allowance - State	The number of additional withholding allowances to be applied for computing state tax.
Visa/Permit Duration Time	Number of days, months or years that the employee stayed in the country
Visa Permit Status Date	Date on which the status of visa/work permit occurred.
Visa/Permit Type of Duration	Unit of duration of time in days, months, or years.
Warrant Designee Address - City and State	The address of the person designated to receive the employees final warrant in the case of death.
Warrant Designee Address - Street	The address of the person designated to receive the employees final warrant in the case of death.
Warrant Designee Address - ZIP	The address of the person designated to receive the employees final warrant in the case of death.
Warrant Designee Name	The name of the person designated to receive the employees final warrant in the case of death.
Warrant Designee Relationship	The relationship of the person designated to receive the employees final warrant in the case of death.
"PARKING LOT" ITEMS **(The following identifies field descriptors that require address in the CHRS data warehouse.)**	
Address Withheld Indicator	Indicates whether or not an employee has requested to have his/her mailing/home address withheld. This includes excluded and represented student employees as well but is specific to mailing/home address.
Student Directory Opt Out	Indicates that an R11 Academic Student Employee has opted to have their information withheld from publication in the campus student directory. Furthermore, this serves as an indicator to withhold identifying information such as name from union reports under the Family Educational Rights and Privacy Act (FERPA).
Physician Medical Board Certification	Used to record the Physician's medical board certification. Those appointed on or after September 1, 1988 must possess and maintain one board certification relevant to the assigned duties. Refer to HR 2006-16 and Executive Order 943. Upon conversion to SAP, will be replaced by License or Certification Code in Oracle/PeopleSoft. Analysis required to determine if historical values can be converted to that field.

ELEMENT NAME	DEFINITION
Professional License Type	Identifies the type of a license, credential or other certification that an employee must possess in order to meet minimum job qualifications and/or qualify for continued employment in a particular class. Also used to identify license requirements when the employee is appointed to or occupies one of the Management Personnel Plan classes. Used in conjunction with Professional License Expiration Date. Upon conversion to SAP, will be replaced by License or Certification Code in Oracle/PeopleSoft. Analysis is required to determine if historical values can be converted to that field.
Service Award-Related Fields	Fields that indicate campus-specific service award types and to track related service and award dates/benchmarks.
Unique Identifier	Indicates the campus-assigned ID, which is a separate identifier from the employee ID automatically assigned by the Oracle/PeopleSoft HR system.