Tab 15

Payroll

PeopleSoft Resident Scheduler System
Payroll

Coordinators are responsible for entering house officer schedules in PS-Resident Scheduler, which is the system Payroll uses to issue house officer paychecks and Accounting uses to invoice hospitals. Coordinators are also responsible for entering the data for payroll accurately, and reviewing the data entered when submitting the beginning of the month and end-of-the month required PS Resident Scheduler reports. See the Resident Scheduler information in the Coordinators Manual for information on entering schedules for payroll and running and submitting the required reports.

House Officers are paid twice a month. They receive their first check on the 15th of the month, which includes the first 15 days of the month. If the 15th of the month is a weekend or it is a banking holiday, house officers will be paid on the last working day before the weekend or banking holiday. Their second check for the month is received on the last working day of the month and it includes the remainder of the days of the month. Again, if the last working day of the month is a weekend or a banking holiday, they will receive their check on the last working day before the weekend or banking holiday.

If there is a combo/account code error entered in PS Resident Scheduler, a PER 3 must be submitted to correct the error. If there is a facility number error or leave not entered when the schedule originally entered, corrections must be noted on the End-of-the Month report, a PER 3 is not needed for these corrections.

The GME Office enters payroll deadlines in the GME Calendar in MS Outlook for Coordinators to view. The payroll department also publishes a payroll calendar on their website.

Coordinators MUST be aware of all payroll deadlines and have all house officers assigned before the deadlines.

Coordinators MUST make schedule corrections if not locked, or notify the GME Office and payroll of any house officer that will be placed on LOA/LWOP during a pay period or any length of time during the year. There is an account number for LOA/LWOP and special facility and action codes to be used when scheduling house officers on LOA/LWOP. The Email address to notify payroll and human resources of house officers on LOA/LWOP is: HRMLWOP@lsumc.edu, Yolanda Lundsgaard, GME Office, is copied on this email.

The Payroll department and the GME Office can assist coordinators and house officers with payroll questions.

Revised September 2013
Email Address for House Officers Placed on LOA/LWOP during Academic Year

Notification MUST be sent to the Email addresses below if a House Officer is placed on LOA/LWOP or if the House Officer Completes Training/Resigns/Terminates during the Academic Year or at Year End on June 30.

HRMLWOP@lsuhsc.edu

Include in the Email:

1) Employee Name

2) Dates of LOA/LWOP (if return date is not known state the start date of the LOA/LWOP and state "until further notice" for the return date. Once the return date is know send an email to the email address with the corrected dates of LOA/LWOP – start date to the return date).

Send a copy of the Email to Yolanda Lundsgaard, GME Office

Employee includes Residents and Fellows

If there is any uncertainty or questions about when LWOP status begins or ends, use this mailbox to have your question answered.

Email Address for House Officers Completing Training, Resigning or Terminating during the Academic Year and at Year end on June 30.

LSUHSC-NotificationofEmployeeSeparation@lsuhsc.edu

Include in the Email:

1) Employee Name

2) Date of separation (This date should be the 1st day the resident/fellow should NOT be paid same as effective date on the PER 3)

3) Whether or not the employee is on an International VISA

4) State whether or not there are any special arrangements made with the employee for the period prior to the separation date? (i.e. working from home)

Employee includes Residents and Fellows.

Send a copy of the Email to Yolanda Lundsgaard GME Office

Revised September 2013
Sample PER 3

To pay a House Officer that was not paid
LOUISIANA STATE UNIVERSITY HEALTH SCIENCES CENTER - NEW ORLEANS CAMPUS
PERSONNEL STATUS CHANGE (PER 3 FORM)

Empl ID
Type Empl ID
PCN
Name
Type Last Name
Last
Type First Name
First
MI
Present Title
Type Title: House Officer ??
School/Division
Medical or Dental Dept.
Type Dept Name & Program Name
cob.worked
Dept. Code
Type Code
1. Termination
effective
Reason

2. Retirement
Regular
Disability
Effective
Teacher's
La. State Empl.
Pay Grp.
#N/A
Hourly

Hours of unused leave to be applied to retirement:
Annual
Sick
Pay Type
#N/A

Hours for which pay is due
Annual
Sick
Reg

3. Leave of Absence
effective
Justification
thru
With pay
Without Pay
Ins. Cont.
Discontinued

4. Return from Leave of Absence
effective

5. Transfer to New Dept.
LSU Work Location

6. Promotion and/or Change in Title
to

7. Tenure Recommendation
(For Faculty Ranks)
yr(s).
Beginning
End Date

8. Other Changes or Remarks
House Officer not assigned in Resident Scheduler prior to payroll run for dates
indicated. Pay House Officer for "type dates". Do Not Over Pay

9. Continuation of Appointment:
Last Appointment Effective
thru
This Appointment Effective
thru

10. Change in Source of Funds

11. Additional Compensation:
Total Amount
Indicate Payment Dates and Amounts
Justification

12. SALARY AND DISTRIBUTION
Effective
Type Date
Funds End Date
Type Date
AED
Rate of Pay
from $
to $ Type Hrly Rate
On the Basis of:
From
To

X Hourly
Monthly
Per Period
Hourly
Monthly
Per Period
Fiscal Year
X
X

Percent of full time
%, if change: from % to %
Period of Appt.

LSU Account 
#
LSU Description
Dept. Code 
#
Fund
Program
Class
Project/Grant
Acct
% Dist
Present Amount
Proposed Amount
Type

Type Info
Account to pay from
Same Acct
enter
in PS
Res Scheduler

Original
Signed
Business Manager Must Sign
Date
12/11/13
Approved
Vice Chancellor
Date
Approved
Dean or Director
Date
Approved
Chancellor
Date
Approved
President
Date

Totals 0.00 0.00
Sample PER 3

To Change Source of Funds for House Officer pay
<table>
<thead>
<tr>
<th>Empl.ID</th>
<th>Type Emp ID</th>
<th>PCN</th>
<th>Name</th>
<th>Type Last Name</th>
<th>Type First Name</th>
<th>Present Title</th>
<th>Type Title: House Officer</th>
<th>PS. Pos.</th>
<th>Type PS Pos</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>School/Division</th>
<th>Type Dept Name &amp; Program Name</th>
<th>Dept. Code</th>
<th>Type Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical or Dental Dept.</td>
<td>cob.worked</td>
<td>last day</td>
<td>Hrs. annual leave for which pay is due</td>
</tr>
</tbody>
</table>

1. **Termination** effective 
   Reason 

2. **Retirement** 
   Regular [x] 
   Disability [ ] 
   Effective 
   Hours of unused leave to be applied to retirement: Annual 
   Sick 
   Hours for which pay is due 
   Emp. Cl. [N/A] 
   Pay Type: Hourly 

3. **Leave of Absence** effective thru 
   Justification 
   With pay [x] 
   Without Pay [ ] 
   Ins. Cont. [ ] 
   Discontinued [ ] 
   Reg/Temp [ ] 
   Reg 
   Country [N/A] 
   Visa [N/A] 

4. **Return from Leave of Absence** effective 

5. **Transfer to New Dept.** 
   LSU Work Location 
   PS Location Code 
   PS Dept. Code 
   Phone # 
   New PCN# 
   New PS. Pos# 

6. **Promotion and/or Change in Title** to 
   Effective 

7. **Tenure Recommendation** (For Faculty Ranks) yr(s), Beginning 
   End Date 
   [ ] Tenure Track 
   [ ] Tenure Granted 
   [ ] Probationary 
   [ ] Non-Tenure 

8. **Other Changes or Remarks** 
   Type any information needed to be sure change is source of fund is recorded 
   Correctly 

9. **Continuation of Appointment:** 
   Last Appointment Effective thru 
   This Appointment Effective thru 

10. **Change in Source of Funds** 

11. **Additional Compensation:** Total Amount 
    Indicate Payment Dates and Amounts 
    Justification 

12. **Salary and Distribution** Effective 
    Type Date 
    Funds End Date 
    Type Date 
    AED 
    Rate of Pay 
    from $ 
    to $ 
    Type Hrly Rate 
    On the Basis of: 
    From 
    To 

   [x] Hourly 
   [ ] Monthly 
   [ ] Per Period 
   [ ] Hourly 
   [ ] Monthly 
   [ ] Per Period 
   Fiscal Year 
   [x] 
   [x] 
   Period of Appt. 

<table>
<thead>
<tr>
<th>LSU Account #</th>
<th>LSU Description</th>
<th>Dept. Code #</th>
<th>Fund</th>
<th>Program</th>
<th>Class</th>
<th>Project/Grant</th>
<th>Acct</th>
<th>% Dist</th>
<th>Present Amount Type</th>
<th>Proposed Amount Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type Info</td>
<td>Incorrect Acct Info</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type Info</td>
<td>Correct Account</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Original** 

<table>
<thead>
<tr>
<th>Signed</th>
<th>Business Manager Must Sign</th>
<th>Date</th>
<th>Approved</th>
<th>Vice Chancellor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Initiating Officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Approved** 

<table>
<thead>
<tr>
<th>Date</th>
<th>Approved</th>
<th>Date</th>
<th>Approved</th>
<th>Chancellor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>President</td>
<td></td>
</tr>
</tbody>
</table>
PeopleSoft Resident Scheduler System

Also known as:
PS-RTS;
PeopleSoft Resident Tracking System;
PS-Resident Scheduler; and ResTrack
PS-RESIDENT SCHEDULER SYSTEM

PeopleSoft Resident Scheduler System, (also known as, Resident Tracking System (RTS)), is the application used to schedule house officers for each pay period for payroll. Coordinators enter data used to identify the hospital/site the house officers are assigned to for the pay periods. The information entered is used to issue paychecks for the house officers and accounting uses the data to invoice the various hospitals/sites each month. It is very important that the information entered in Resident Scheduler is accurate. If original entries are not accurate, corrections should be communicated to the GME Office on the monthly reports that are required at the beginning and the end-of-the-month; and/or by submitting a PER 3 to make corrections for account code (combo code) corrections.

The required fields for scheduling House Officers are:

**From and To dates.** House officers should be assigned for the month. House officers can be assigned for the entire year if the coordinator can enter the yearly schedule. The coordinator would then only have to review and update monthly. It is best to assign each month separately because it is easier to enter leave taken if notified after the schedule has been entered.

**Action:** 1 = Active; 2 = Vacation; 3 = Leave of absence; 4 = Educational leave; 5 = Sick leave; 6 = Military leave.

**% Effort:** Should equal 100% - can be split between accounts and dates, but total for all days in the month should be 100%.

**Facility:** A 2 or 3 digit code that identifies the Hospital/site of the rotation for the dates indicated. If a house officer is on Leave of Absence, the facility should be 99 = LOA. If a facility code is needed or a program code should be added to a facility code, contact the GME Office to request a code.

**Work DeptID:** A 2 digit code that identifies the house officer’s training department/program. The coordinator can get this number from the department business manager or the GME Office.

**Combo Code** (may also be called account code): This code identifies the hospital/site the house officer is assigned to for the pay period and the hospital/site accounting should invoice. Coordinators can get this code from the department business manager. If it is a new code, the business manager or coordinator, must send a request to accounting, specifically Mr. Jon Burroughs, to have the code added to resident scheduler. Jon will need to know the effective date of the account, if it is a paying account (should be yes), and if it includes beeper fees, and possibly some other information.

**Comment:** This section is optional. Coordinators can enter whatever remarks or reminders they may want to note for the rotation. Comments do not appear on the required reports.
SCHEDULING

1. At the end of the month, coordinators review House Officer schedules in PS-Resident Scheduler for the next month; (i.e. at the end of December review January schedules). Be Sure House Officers are scheduled for the next Month before that pay period is processed for payroll. Review Lock-out and Payroll run deadlines. Coordinators should confirm all house officers are assigned by using the Un-assigned/Under-assigned option in Scheduler under Inquire.

Scheduling/Viewing Options:

**Use – Schedule by Resident** – to schedule each House Officer individually.

**Use – Schedule by Location** – to schedule a group of house officers to the same account, (combo code), for the same dates.

**Inquire – Schedule By Account Code** to schedule the house officers that are assigned to the hospital/funding account entered for the dates entered. Use to confirm all house officers assigned to a particular account have been scheduled correctly.

**Inquire – Schedule By Resident** – Also used to schedule each house officer individually.

**Inquire – Unassigned/UnderAssigned Res** to view house officers that are unassigned/under assigned for the dates entered. House Officers should not be un- or under-assigned for the month, unless they are completing training, resigning, or terminated before the end of the month. This should be done before and after scheduling house officers for the month.

2. If there are House Officers that are not assigned for the month, they should be scheduled using the coordinator’s preferred option for scheduling.

**Use – Schedule By Resident**

**Use – Schedule By Location** – be sure you don’t select House Officers already assigned for the time period you are entering.

**Inquire – Schedule By Resident**

If you have to make corrections or add leave, do so in the option you are most comfortable using.

**Use – Schedule By Resident** - update dates, account code, facility, work dept ID, % effort, and action if applicable; if adding leave, update dates, add leave dates, add active dates.

**Inquire – Schedule By Resident** – select schedule you need to update

**Inquire – Schedule By Account Code** – if a House Officer is assigned to an account code in error correct the info.

3. After coordinators have scheduled the un-assigned/under assigned House Officers and/or made corrections to assignments, coordinators should check the un-assigned/under assigned list again to be sure schedules entered are correct and that all House Officers are assigned for the month.

4. **LOA/LWOP** House Officers that will be placed on LOA/LWOP during the academic year, must be assigned to the LOA/LWOP account number, facility and action codes for the LOA/LWOP dates. An Email must also be sent the email address HRMLWOP@lsushc.edu and the GME Office copied. When the House Officer returns from LOA/LWOP be sure all fields are corrected to pay correctly.
5. Coordinators must review Lock-out and scheduling deadlines, and be sure House Officers are assigned for the next pay period, especially if changes were made to the schedule.

6. Certification reports are required at the beginning of the month and at the end of the month. See the Certification Reports section in the Coordinators Manual.
CERTIFICATION REPORTS
PS-Resident Scheduler (RTS-Resident Tracking)

Certification Reports will be required twice a month. The first Certification Report will not include the Signature page that is required for the end-of-the-month Certification. It will require the Program Coordinator’s signature.

Schedules must be entered by the end of the current month for the next month (for example, August schedules must be entered by July 31). Coordinators will print the schedule entered for the month, review the entries, if they are correct, sign the report and return it to the GME Office by the requested deadline. If corrections have to be made, and RTS is locked for the dates of the changes, the Coordinator must contact the GME Office to unlock RTS for the corrections to be made, the Coordinator will make the corrections, contact the GME Coordinator, RTS will be locked and the Coordinator must run the report again to review before signing and submitting to the GME Office. If RTS is not locked, Coordinator makes the change, prints the report with the correction made, review, signs and submits to the GME Coordinator by the requested deadline. If the report can not be hand delivered, it must be scanned and emailed and documented in the subject line that it is the certification report, or faxed to the GME Coordinator by the requested deadline.

This process must be completed in a short period of time due to the lock out and payroll schedules. A Calendar is provided with the deadlines.

Coordinators are locked out only for a pay period at a time. Therefore, Coordinators can make changes only for the dates included in the next payroll, usually the 16th-30th or 31st of the month, before the lockout date for that payroll. A calendar is provided with these dates.

END Of The Month Certification Report - Coordinators will continue to print this report by the date it is available (must be after Payroll processes the last payroll for the month), review the data, make corrections, and get the required signatures. In addition to the required signatures, all House Officers must initial next to their name on the report that the Hospital rotation information, and any corrections made by the Coordinator are correct. The report is then submitted to the GME Coordinator by the requested deadline. Remember, if there are Account number changes made to this report a PER 3 MUST be attached to the report when submitted to the GME Coordinator. A Calendar is provided with these dates.

After receiving the End of the Month Certification reports and before the GME Coordinator notifies Accounting that all schedules are approved and the data is correct to begin the invoicing process, the GME Coordinator will send each hospital contact person a report identifying the House Officers assigned for the month, to review and approve. If there are any discrepancies, the Hospital contact person will notify the GME Coordinator and the GME Coordinator will contact the Program Coordinator to resolve the discrepancies. To resolve discrepancies, documentation may be required from the program coordinator to submit to the Hospital to justify the original data is correct. If the information the Hospital contact person provides is correct, and different from the data in Resident Scheduler, the program coordinator will correct the end of the month certification report and initial the change, and the correction will be entered by the GME Coordinator. If the change is an account number change, a PER 3 must be submitted by the program Coordinator with the corrected report. This process will also have to be completed in a short period of time due to invoice processing deadlines.

NOTE: Process is subject to change or additional duties added at anytime.
PS-RTS TIPS

1. Business Managers should provide Coordinators a list of valid Combo/Account Codes that include the description (i.e. Kenner-Pulmonary; MCL-Neurology; Childrens –Neurosurgery, etc.), for each code that will be used during the year to assign House Officers in PeopleSoft Resident Scheduler System (PS-RTS). The list should be updated if new Combo/Account Codes are added during the year.

2. At the end of every month, coordinators must check if the House officers are assigned for the next month by entering PS-Resident Scheduler – Inquire – Unassigned/Under Assigned Res. Enter From and To dates and the Location Code (D-Code), if House Officer names appear, select Detail, next to each house officer’s name and the dates the house officer is not assigned are listed. The coordinator should then assign the House Officers listed. After these assignments are entered, the coordinator should check the Un-assigned/Under Assigned Res option again and again until no house officer names appear. If no House Officer names appear, the House Officers are assigned for that month.

2. If there is a Combo/Account Code change for a House Officer that is scheduled, and payroll has run for the dates of the change (check the calendar of deadlines for the payroll run date), a PER 3 must be submitted with the end-of-month report for the change. If payroll has not run, and the system is locked, the coordinator should contact GME by email and state in the “Subject Line: Combo/Account Code change for these dates”. If the GME Office cannot make the change, a PER 3 must be submitted for the combo/account code change with the end-of-the month report.

3. If there is facility, vacation, sick, educational or other leave additions, deletions, or date changes, DO NOT send an email to GME. Coordinators should make the facility, leave change, addition, correction on the end-of-the month Certification Report that is submitted to the GME Office. If the leave change involves a Combo/Account Code change, follow the instructions in #2 above.

4. When reviewing the Certification Reports, if there are corrections for GME to enter, be sure the change can be identified easily. This can be done by highlighting, and/or using different color ink to put an asterisk, write the change at the bottom of the page or some other way that the GME Office will be able to identify a correction must be entered.

5. Check if there is a Facility Code for the rotation site in Setup-Facility. If there is no code for the hospital/site, contact the GME Office to request a code. Check if the program code is associated with the facility code, if not, contact the GME Office to request to add the program code to the facility.
PeopleSoft
Resident Scheduler
System
PeopleSoft 9.1
PeopleSoft
Resident Scheduler
System
PeopleSoft 9.1
PeopleSoft Resident Scheduler System

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VII. Inquire-Schedule by Account Code
VIII. Inquire-Unassigned/Under Assigned Residents
IX.  Inquire-Leave Taken by Resident
X.   Over Allotted Leave
XI.  Resident Schedule Report
XII. Error Messages
XIII. Warning Messages
XIV. Add Leave to a Schedule Already Entered
After logging into PS Desktop, select the **PeopleSoft 9.1 Launcher** option from the Start menu.

For Production, the PeopleSoft System field should show “Human Capital Management”; In the Database field: Select **PS 9.1 HCM Production (PS9HRPRD)** then Click the Start Button.
To log out of PeopleSoft, click the Sign Out hyperlink on the Right hand side of any Page.

II. Resident Scheduler Menu

Navigation → LSUHSC Processes, Resident Scheduler

Main Menu for Resident Pages- Select “Main Menu”
Select “LSUHSC Processes” (Not everyone will have a list of options, may only have LSUHSC Processes)

Select “Resident Scheduler” (not everyone will have 2 options, may only have Resident Scheduler)
Within the Resident Scheduler menu, there are Four Options:

- **Use** — Allows update access to Schedules, Pager Overrides and Lock Out dates
- **Setup** - Data Entry pages for Setup Tables such as Facility, HO Level.
- **Inquire** — Browse Access to Schedules, Leave Exceptions and Unassigned Residents
- **Report** - Resident Schedule Reporting

III. Schedule By Resident

**Navigation → LSUHSC Processes, Resident Scheduler, Use, Schedule by Resident**
Resident Schedules can be entered or updated by using the Schedule by Resident Page.

- **Enter Employee ID (Emplid) or Name on the Search Page**
  - **Employee ID** – System generated ID assigned to each resident. You must enter leading 0's for this field.
  - **Name** – Enter Last, First (no space after comma) Partial names are allowed
  - **Last Name** – Enter all or part of the Last Name

- You may also search using House Officer Level (1-10) OR Location Code (Full or partial value)
If there is more than one House Officer with the same last name, select the name from the list that appears.
When the Schedule by Resident Page is opened, the most recent schedule is displayed

**Required Fields**
- **From** - Beginning Date of Schedule
- **To** - Schedule End date
- **Action** - Active or one of the Leave Types
- **Facility** - Work Location
- **Work DeptID** - Department within the Facility Work Location
- **Combo Code** - Financial Chartstring used for salary (formerly called Account Code)
- **% Effort** - Percent of an 8 hour day

**Display Only Fields**
- **Job Code / HO Level** – Display only, shows job code at time of schedule.
- **Paying Acct** – Flag for external sites paying resident, value is set by Account Code Setup
- **Chart field Details** – Defines the financials chart string

**Optional Fields**
- **Comment** – Text field for comments regarding the schedule

**Page Options**

**New Schedule** - To enter a new Schedule, click the ‘+’ button. A new page, pre-filled with data from the previous schedule will be displayed.

**Delete Schedule** - To delete a Schedule, click the ‘-’ button. The schedule deleted will be removed when the Save key is pressed.

**Note:** When a schedule is displayed for a locked timeframe, the fields will be grayed. Contact the GME Office for updates to locked schedules. If all fields are grayed except the To: Date, the date may be adjusted back to the last date locked.
New Schedule Entry

Navigation → LSUHSC Processes, Resident Scheduler, Use, Schedule by Resident

When adding a new Schedule, a pre-filled page will be displayed. All fields except the 'To' date will be brought forward from the previous row. The From Date will contain the current date.

![Image of Schedule by Resident page]

Change the fields on the Schedule by Resident Page as needed. All fields except the Comment field are required. If you are unsure of a value, such as the Facility, click on the magnifying glass next to the field, for a list to select from. Once the Account code field is selected, the Chart Field Details will be displayed.

Save - After changes are made, click save to update the database

Options:
- **New Schedule** - To enter a new Schedule, click the '+' button. A new page, pre-filled with data from the previous schedule will be displayed.
- **Delete Schedule** - To delete a Schedule, click the '-' button. The schedule deleted will be removed when the Save key is pressed.
- **Scroll arrows** < -> allow viewing of previous schedules.
- **View All** – By clicking the View All hyperlink, all schedules for the employee will be displayed on one page.
IV. Schedule by Location

Navigation → LSUHSC Processes, Resident Scheduler, Use, Schedule by Location

The Schedule by Location page provides a mechanism to schedule several residents at once.

- Enter the Location Code (Full or Partial) of the residents to Schedule. Click Search

- Start Date - Beginning Date of Schedule
- End Date - Schedule End date
- Account Code - Financial Chartstring used for salary
- Facility - Work Location
- Department - Department within the Facility Work Location

Note: The House Officer Level field is used only to help select the group of residents to schedule.
Select All — Checks the Add Check box for all residents in this Location, Scroll down to view all residents on the page

Step 3: Click the Initialize Now button.
**Step 4:** After initializing, you are transferred to the Processing tab.

- If changes to the schedule are needed before they are saved, the changes can be made prior to clicking the Process Now Button.
- Once the schedules displayed are correct, click Process Now. It is at this time that the residents will actually be scheduled.
- After Clicking the Process Now button, if any records remain on the page, check the Error Message Column on the Right side of the page. Once the errors are corrected, Click Process Now to save.

**Note:** All fields on this page are required.

Once the records are Successfully Saved, the Word ‘Saved’ will briefly appear in the right hand corner of the Page and then the screen will display a blank row.
Step 5: By clicking on the Initializing tab at the top of the page, more resident's schedules can be processed.

- Home > LSUHSC Processes > Resident
  Initializing Processing

Step 6: Using the Hide Process Rows check box, you will be able to shorten the list to ensure that all residents in the Location Code have been scheduled.

Note: When a new session is started and additional records are selected, any unsaved rows from the previous schedule are removed from the processing page.
V. Inquire Menu Options

The Inquire Menu allows browse access to Resident Schedules as well as pages designed to show schedule exceptions.
VI. Inquire – Schedule by Resident

Navigation → LSUHSC Processes, Resident Scheduler, Inquire, Schedule by Resident

A snapshot of all Schedules for one Employee can be viewed by using the Inquire -Schedule by Resident Page.

- Enter Employee ID (Empid) or Name on the Search Page
  - Employee ID – System generated id assigned to each resident. You must enter leading 0's for this field.
  - Name – Enter Last,First (no space after comma) Partial names are allowed
  - Last Name – Enter all or part of the Last Name

- You may also search using House Officer Level (1-10) OR Location Code (Full or partial value)
Once selected, all scheduled data is displayed, sorted by the From date. To drill down into the detail of an individual schedule item, click the details hyperlink.

The Detail tab allows the same features as the data entry Schedule by Resident page. Once updates are made, click the SAVE key.
VII. Inquire – Schedule By Account Code

Navigation → LSUHSC Processes, Resident Scheduler, Inquire, Schedule by Account Code

Resident Schedules can be viewed by using the Inquire -Schedule by Account Code Page.
- Enter the Account Code assigned to the Resident’s Schedule.
- Enter the Date Range, Start and End Dates
- Click OK

For the account code specified on the search page, the schedules assigned to the account code are displayed.

Return to Prompt Button – Click to view schedules assigned to different account code.

Detail Hyperlink - Click to drill down into the detail of an individual schedule item. The Schedule by Resident page is displayed for the time period selected. Schedule changes can be made and saved by clicking the SAVE key.
VIII. Inquire – Unassigned / Under Assigned Residents

A tool available to identify residents that may have been overlooked while scheduling is the Unassigned / Under Assigned Residents page.

- Enter the Date Range, From and Thru Dates
- Enter Location code (Full or Partial), this field is optional
- Click OK

After clicking OK, a list of the residents that have not been scheduled 100% during the specified time period are displayed. To display residents in a specific location code, enter the code and tab out of the field.
The Details button is available to see the specifics of the under-scheduled days. Each Unassigned or Under Assigned day is shown on the Details page.

Return to Prompt Button – Return to Search Screen to enter new date range

Details Page for Days in Date Range that are not 100% percent effort

Note: If all residents are already scheduled in the date range entered OR in the date range/location combination entered, the header information will still appear but no residents will be listed.
IX. Inquire – Leave Taken By Resident

Navigation → LSUHSC Processes, Resident Scheduler, Inquire, Leave Taken By Resident

Scheduled Leave can be viewed by using the Inquire –Leave Taken by Resident Page.

- Enter Employee ID (EmpId) or Name on the Search Page
  - **Employee ID** – System generated id assigned to each resident. You must enter leading 0’s for this field.
  - **Name** – Enter Last,First (no space after comma) Partial names are allowed
  - **Last Name** – Enter all or part of the Last Name

- You may also search using House Officer Level (1-10) OR Location Code (Full or partial value)

The first section of the page shows a summary of each leave type for each of the residents HO levels. The Leave Limit is provided as a reference. The second section provides the detail of the leave schedules.

**Return to Search** – Click to view scheduled leave for a different resident
X. Over Allotted Leave

Navigation → LSUHSC Processes, Resident Scheduler, Inquire, Over Allotted Leave

To identify leave scheduling conflicts, the Over Allotted Leave Page provides exception reporting:

- Enter Location code (Full or Partial)
- To see all residents with Over allotted leave, leave the location field blank
- Click OK

Schedules for Leave that exceeds the max allowable leave days per House Officer level are displayed. To determine which residents to show, the system will include the residents having schedules during the current fiscal year and previous fiscal year.

Detail Hyperlink - To list the specific schedules containing Leave, click the Detail hyperlink. Location Text Box – To search for an over allotted leave in a different location, enter Location code and press Tab. Return to Prompt Button – return to Search screen
The Detail leave page will show the summary of days as well as the daily leave taken.

Return - Click the Return Button at the bottom of the page to return to the List of exceptions by Location.
XI. Resident Schedule Report

Navigation → LSUHSC Processes, Resident Scheduler, Report, Resident Schedule Signature

To run the Schedule Report (The End-of-the Month Report), click, Resident Schedule Signature.

(not everyone will have all these reports – may only have “Resident Schedule Signature” and “Resident Scheduler by AcctCD”)

Step 1: Add a new Run control Record by clicking the Add a New Value hyperlink

Note: The Run Control ID will be saved, next time you run the report, leave the Run Control ID field blank and click Search to select a run control.
Step 2: Add a value in the Run control ID field, Click Add.

Step 3: Complete the fields needed to run the report:
- **Location** – Enter a location code (all or part) to Select Resident Schedules for the Report. Additional Locations can be included on the same report by clicking the 'Add' button in the Location Section.
  - **Note**: Selecting all locations will print schedule for ALL Residents, not just those in your Department.
- **From Date, To Date**: Enter the Date range for Schedules to Report. When printing the Department Signature Form, the From Date and To Date are not used.
- **Department Signature Form** - click the Check Box and enter the Year and Month for the report.
- **Click Run**
Step 4: Select PSNT for the Server Name field, Click OK

Step 5: Click on “OK”

Step 6: Click on the Process Monitor Hyperlink to view the Report’s Run Status.
Step 7: Click the Refresh Button to view the status of the report. Once successful, click the Details Hyperlink to view the report. Note: Run Status must state "Success" and Distribution Status must state "Posted".

Note: Click the "Refresh" Button until the Run Status must state "Success" and Distribution Status must state "Posted". Once these show "Success" & "Posted", click on "Details".

Step 8: Click the View Log/Trace hyperlink to view the report.
Step 9: Click on the Hyperlink named ZZRT011 PDF files to view the report and Department Signature Form.

Step 10: Once the PDF is opened, you can Print the report by using the Printer button on the tool bar. You can also save the report to your desktop by using the File Save As button on the tool bar.

REPORT:
LSU School of Medicine in New Orleans
Resident Fellow Month End Rotation and Funding Certification

I ___________________________________________ resident/fellow program director for the department
doing business as MED EMERGENCY MED RESIDENT, certify that:
All Residents and Fellows working at the facilities listed on the Excel template for the month of June 2012
are accurate and correct. The accrual schedule provided by Res Bank represents the days Residents and Fellows
worked at the assigned facility for the assigned month and include all time taken. This information has been provided
within 3 working days after the last payroll was processed for the assigned month. I further certify that the
instructor assigned the form above to the resident/fellow director for the department and that each listed facility confirms the
information.

__________________________
Program Director

__________________________
Date
Beginning of the Month Report

To run the Schedule Report (The Beginning of the Month Report), click, Resident Schedule Signature.

Step 1: Add a new Run control Record by clicking the Add a New Value hyperlink

Note: The Run Control ID will be saved, next time you run the report, leave the Run Control ID field blank and click Search to select a run control.
Beginning of the Month Report

Step 2: Add a value in the Run control ID field, Click Add.

Step 3: Complete the fields needed to run the report:

- **Location** – Enter a location code (all or part) to Select Resident Schedules for the Report. Additional Locations can be included on the same report by clicking the ‘+’ button in the Location Section.
  
  **Note:** Selecting all locations will print schedule for ALL Residents, not just those in your Department.

- **From Date, To Date**: Enter the Date range for Schedules to Report. When printing the Department Signature Form, the From Date and To Date are not used.

- **DO NOT select the boxes:** “Include Signature Line?” or Include Department Signature Form?

- **DO NOT Enter** “Year Dates” or “Month”

- Click Run
Beginning of the Month Report

**Step 4:** Select PSNT for the Server Name field, Click OK

![Image of software interface showing step 4 details](image)

**Step 5:** Click on “OK”

**Step 6:** Click on the Process Monitor Hyperlink to view the Report’s Run Status.

![Image of software interface showing step 6 details](image)
Beginning of the Month Report

Step 7: Click the Refresh Button to view the status of the report. Once successful, click the Details Hyperlink to view the report.

Note: Click the “Refresh” Button until the Run Status must state “Success” and Distribution Status must state “Posted”.

Step 8: Click the View Log/Trace hyperlink to view the report.
Beginning of the Month Report

Step 9: Click on the Hyperlink named ZZRTD11 PDF files to view the report.

Step 10: Once the PDF is opened, you can Print the report by using the Printer button on the tool bar.
XII. Error Messages  Update to record is not allowed

Combo Cd  [Combo Code] or Acct_Cd [Account Code] inactive between  [start date] and [end date]

The Account code selected is not valid. The account code may have been inactivated by accounting services. Select the Account code by clicking on the magnifying glass next to the Account code field and select a valid account code from the list. If the Account Code is not in the list, please contact Accounting Services or the GME Office.

ACTION [action code] inactive between [start date] and [end date]

The action code selected is not allowed. Click on the magnifying glass next to the Action field for a list of allowable values. If the value you need is not in the list, contact the GME office for assistance.

All fields need data

All fields are required for schedule record.

Cannot assign a paying account code to paygroup: [Paygroup code]

A resident that is assigned to a paygroup other than NBR cannot be assigned to a paying account. Please contact the GME Office or Accounting Services for assistance in assigning the correct account code.

Cannot change schedule earlier than prior fiscal year

GME Office is allowed to make history schedule changes for a maximum of 2 complete fiscal years. Changes are allowed for the current fiscal year and all of the previous fiscal year.

Cannot cross fiscal year

Check the start and end dates to ensure that dates are correct and do not cross a fiscal year.

To create a schedule that crosses into the next fiscal year, create two separate schedules with the first schedule Ending on June 30th and the second schedule beginning on July 1st.

Cannot determine fiscal year

Check the start and end dates to ensure that dates are correct and do not cross a fiscal year.

Cannot find HO Level from jobcode [Jobcode]

The House Officer level table needs to be updated. Please send the error message to ‘PS HR Development’.
Cannot process any schedule on or before [Date]

Resident coordinators should contact the GME Office to arrange for the schedule correction. Schedule changes are not allowed after the schedule is locked by the GME Office or once payroll has been run.

GME Office updates are not allowed once payroll has started. The GME Office should contact Payroll to arrange for schedule corrections.

Change in paygroup between [start date] and [end date]

A schedule that spans a time frame where a resident is in two or more pay groups is not allowed. Please enter two separate schedules for this resident. For assistance, contact the GME office.

Dept [Department code] inactive between [start date] and [end date]

The Department code selected is not allowed. Click on the magnifying glass icon next to the Department field for a list of allowable values. If the Department you need is not in the list, contact the GME Office.

Duplicate Start Date schedule

One or more schedules with the same start date already exist for this resident. Review existing schedules for accuracy.

Employee status not always active or in valid paygroup between [start date] and [end date]

During the schedule period, HR has either terminated or modified the pay group for this resident. Modify the schedule using the appropriate time frame when the resident is active or is in a pay group allowed by Resident Tracking. Please contact HR or the GME Office for assistance.

Emplid [Emplid] > rcd < [Empl_Rcd] > job record does not exist before [Start Date]

Residents must have an active job record for the time period being scheduled. Contact GME or HR for assistance.

Emplid < [Emplid] > Rcd < [Empl_Rcd] > Total %effort ([Total Effort]) is over 100 on [Date]

Adding the schedule will result in scheduling the resident over 100% for the date specified. Review the Percent Effort field and alter the existing schedules to ensure the total percent effort is not over 100%.

End Date cannot be less than Start Date

Check the start and end dates for valid values. End date must be a later date than the start date.
Enter Start Date first

Enter the Schedule start date. Other fields on the page will have list box values displayed based on start date.

Error...Negative %effort [Percent Effort]

Correct the percent effort field. Only positive amounts are allowed.

Error...Cannot find existing Day record to delete [Date]

This is an internal System error. Please report the Emplid and date of schedule to 'PS HR Development'.

Facility [Facility code] inactive between [start date] and [end date]

The Facility code selected is not allowed. Click on the magnifying glass icon next to the Facility field for a list of allowable values. If the Facility you need is not in the list, contact the GME Office.

Fac/Dept [Facility / Department] inactive between [start date] and [end date]

The Facility and Department combination specified is not allowed. Please first select the Facility by clicking on the magnifying glass next to the Facility field. Then click the magnifying glass next to the Department and select the appropriate department from the list. If the department or facility needed is not in the list, please contact the GME Office.

From Date cannot be greater than Thru Date

The starting date of the schedule cannot be greater than the ending date.

Invalid Empl Rcd

Pager Override page error. Enter a valid Empl Record number for this employee.

Jobcode changes between [start date] and [end date]

During the schedule period, the House Office Level (Jobcode) has been changed by HR. Two separate schedules will need to be created. For assistance, contact the GME Office.

Must enter either a Run ID or a pay calendar specification

Enter a valid Pay Run ID to run the Load Time and Labor Data process. Also required to remove resident hours from Time and Labor.
Percent effort cannot have decimal numbers

Decimal values are not allowed. Only zeros are allowed after the decimal point. Example, 40% = 40 or 40.00

The dates and the status are required

To enter a pager override, enter the Start and End dates and Pager Status field.

Total allotment does not match

When entering the number of house officers at each level, the total must match the Allotment Total.

Total % effort [Percent Effort Total] is over 100 on [Date]

Adding the schedule will result in scheduling the resident over 100% for the date specified. Review the existing schedules for the Date specified.
XIII. Warning Messages: Update to record is allowed

EMPLID [EMPLID] schedule [start date] to [end date] will go over the leave limit of [No of days] days

Review the resident’s leave request. Scheduling this leave will result in the resident taking more leave than allowed. Contact the GME office for assistance.

EMPLID [EMPLID] schedule [start date] to [end date] will have jobcode change from [Jobcode] to [NewJobCode]

The page is displaying the resident’s current job code (House Officer Level). When the schedule is saved for the specified time period, the house officer level will be different than the one on the page. If the HO level should be the same as the one displayed, contact HR to review the resident’s record.

Rows of outstanding data from your previous session will be deleted. Do you want to continue?

Before navigating to another page from Schedule by Location page, click the “Process Now” button to save the schedules.
XIV. Add Leave to a schedule already entered:

If the Schedule has been entered and the system is locked or Payroll has run for days that should be leave days and not active days, the change cannot be made in Scheduler but must be noted on the end-of-the month report.

If the schedule has been entered and the system is not locked and Payroll has not run for days that should be leave days and not active days, to enter leave requires the schedule to be broken up into multiple entries, for example: one entry if the first 10 days are active; one entry if the next few days are leave days; and one entry if the remainder of the month is active days.

Change the “From” date, if applicable, or the “To” date, if applicable, to enter the active or leave days.

For example the person listed in the record below has submitted leave for December 11-14, 2010 (Figure1)

- Type over the “To” date with 12/10/2010 (the last active date before leave begins 12/11)
- Keep the Action as “1” Active
- Save the correction.

To add the leave days, a new record/entry must be added.

New Record/Entry – to enter a new record or next entry, click “+” button. A new page, pre-filled with data from the previous schedule will be displayed and the day the record is being added will appear in the “From” field and there will not be anything in the “to” field.
- Enter the leave dates in the "From" field and in the "To" field
- Change the Action to the type of leave (i.e. Vacation, Sick, Education, LOA, etc)
- If the account and facility remain the same, do not change these fields.
- Save the entry

Repeat the steps above to enter the remainder of the month's schedule as Active.

Save the Entry
For this example the schedule for July will appear as

July 1-14, 2012 Active
July 15-20, 2012 Vacation
July 21-31, 2012 Active

Always be sure you have all days for the month scheduled when you change a schedule. It is easy to omit something. Always check the monthly schedules before submitting reports for the beginning of the month and after making changes by using the option "Unassigned/Under Assigned Res". If names appear there are dates the house officer(s) are not assigned. Click on "Details" to see the dates they are not assigned for the month and assign the house officer(s) for these dates.