Database Description

The PersonnelDW database contains quarterly information about employee demographics, classification of work, FTE, and funding source for the community and technical colleges and SBCTC.

This database combines both legacy PMIS records and PeopleSoft HCM records to form a longitudinal dataset spanning back to summer quarter of 2006-07. Legacy records exclude records with an employee status of Sabbatical, Leave, or Unknown. For both legacy and PeopleSoft, hourly workers and student work study records are excluded. Volunteers are excluded. Retirees are also excluded from both data sources.

- Hourly Workers, Student Work study and Volunteers
  - Excluded by: EMPL_CLASS NOT IN ('STU','HRY','VOL')

- Retirees are associated to Business Unit 900; Business Unit 900 is not included in the extract

For PeopleSoft records, all applicable employees who have received a paycheck with a valid active Combo Code/Account Code and a Primary Flag with earn codes 'FTF', 'PTF', 'REG', 'MLC' during the quarter are included in the extract. This is determined by comparing the paycheck PAY_END_DT to the institution’s TERM_BEGIN_DT + 14 days and the institution’s TERM_END_DT + 14 days.

- Based on the PS_PAY_EARNINGS table record with PAY_END_DT between the institution’s TERM_BEGIN_DT + 14 days and TERM_END_DT + 14 days
- SYSADM_HCM.PS_PAY_EARNINGS.OFF_CYCLE must be ‘N’.
- The TERM_BEGIN_DT and TERM_END_DT used is the SYSADM_CS.PS_TERM_TBL entry for ACAD_CAREER = ‘UGRD’ for the college.
- SYSADM_HCM.PS_JOB FTE > 0
- The employee must appear in SYSADM_HCM.PS_CTC_EARNS_DIST with an effective date before the SYSADM_CS.PS_TERM_TBL TERM_END_DT for the institution and an ERNCD of 'FTF', 'PTF', 'REG' or 'MLC', and PRIMARY_FLAG = ‘Y’. (For all term dates in the creation of this database, the Spokane dates are used for SBCTC.)
- The Account Code for the SYSADM_HCM.PS_CTC_EARNS_DIST selected above must be Active status and PROCESS_GROUP LIKE '%PAYROLL%' in the table VALID_COMBO_TBL with an effective date before the TERM_TBL.TERM_END_DT for the institution.
- SYSADM_HCM.PS_PAY_EARNINGS.OFF_CYCLE must be ‘N’.

We pull a base set of employees based on the pay earnings as described above.

With these employees, we make sure they are active employees during the college’s term by using the following criteria:

- Using JOB.HR_STATUS = 'A' and EMPL_STATUS IN 'A' or 'L' and FTE > 0 that is
effective dated between the TERM_BEGIN_DT and TERM_END_DT (this effective date is not adjusted for pay periods, there is no + 14 days added to the criteria)

- PS_JOB Effective Dated Action Date uses the job record EFFDT
- These employees are excluded:
  - JOB.EMPL_STATUS <> ‘A’ or ‘L’
  - JOB.EMPL_CLASS = ‘STU’ or ‘HRY’ or ‘VOL’
  - JOB.FTE = 0

- The employees who are excluded per the above criteria are excluded only if the exclusion criteria are met before the term begin date and no criteria/records for inclusion are subsequently met prior to the term end date. (In other words, if an inclusion event occurs after the exclusion criteria are met, the employee will be included.) Regardless of any other criteria and timing, SYSADM_HCM.PS_JOB FTE must be > 0 for inclusion

- The new PRORATED_FTE field will reflect a prorated FTE amount based on the number of days worked during the term. For example, if a full-time employee left the institution exactly half way through the term, their FTE value would be 1, but their PRORATED_FTE value would be .5. This allows for position related analysis. For legacy records, the PRORATED_FTE value is the same as the FTE value.

- QHC_DS_PAY_EARN_JOB_DW_DTL Field name and definition to support above criteria sections above:

<table>
<thead>
<tr>
<th>Field Label in Queries</th>
<th>Description of Field</th>
<th>Field Type</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empl Class</td>
<td>Employee Class Code</td>
<td>Char3</td>
<td></td>
</tr>
<tr>
<td>Headcount by Company</td>
<td>Aggregate count by EmplClass, Company in Term</td>
<td>SNum13.0</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>Company code</td>
<td>Char3</td>
<td></td>
</tr>
<tr>
<td>Unit</td>
<td>HR Business Unit</td>
<td>Char4</td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>Employee ID</td>
<td>Char11</td>
<td></td>
</tr>
<tr>
<td>Max Pay End Date in Term</td>
<td>Maximum Pay End Date found in Pay Earnings for the Term + 14 for that Employee</td>
<td>Date</td>
<td>PAY_END_DT BETWEEN TERM_BEGIN_DT + 14 AND TERM_END_DT + 14</td>
</tr>
<tr>
<td>Empl Record</td>
<td>Associated Employee Record</td>
<td>Num3.0</td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td>Term Code</td>
<td>Char4</td>
<td></td>
</tr>
<tr>
<td>Institution</td>
<td>Associated Institution</td>
<td>Char5</td>
<td></td>
</tr>
<tr>
<td>Term Begin Date</td>
<td>Term Begin Date for that Institution</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Term Ending Date</td>
<td>Term End Date for that Institution</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Term Begin Date + 14</td>
<td>Term Begin Date + 14 days for that Institution</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Term End Date + 14</td>
<td>Term End Date + 14 days for that Institution</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------------------</td>
<td>-----------</td>
<td></td>
</tr>
<tr>
<td>FTE Dist Amount</td>
<td>Displays the FTE distributed value for Employee/EmplRcd in Term</td>
<td>SNm14.6</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Aggregate query round to 4 SNm7.4</td>
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</tr>
<tr>
<td>Fund</td>
<td>Chart field Fund code associated to the FTE Distributed Amount</td>
<td>Char5</td>
<td></td>
</tr>
</tbody>
</table>

DataLink views used:
- SBMD.EMPLOYEE_BASE
- SBMD.PMIS_EMPLOYEE_JOB_STAGE
- SBMD.PMIS_EMPLOYEE_JOB_STAGE_TBL
- SBMD.PMIS_EMPLOYEE_JOB

PeopleSoft tables and fields used to determine inclusion:
- SYSADM_CS.PS_TERM_TBL
  - TERM_BEGIN_DT
  - TERM_END_DT
  - ACAD_CAREER
  - INSTITUTION
  - STRM
- SYSADM_HCM.PS_PAY_EARNINGS
  - EMPLID
  - EMPL_RCD
  - BUSINESS_UNIT
- SYSADM_HCM.PS_JOB
  - BUSINESS_UNIT
  - EFFDT
  - ACTION
  - HR_STATUS
  - FTE
  - EMPL_CLASS
- SYSADM_HCM.PS_CTC_JOB_DATA
  - CTC_JOB_TERM
- SYSADM_HCM.PS_CTC_EARNS_DIST
  - EMPLID
  - EMPL_RCD
  - EFFDT
  - FDM_COMBO_CD
  - ACCT_CD
- SYSADM_HCM.PS_VALID_COMBO_TBL
- FDM_COMBO_CD
- SETID
- EFFDT
- SYSADM_HCM.PS_JOBCODE_TBL
  - JOBCODE
  - SETID