Financial Operations Meeting

Fall 2022

Northwestern
Agenda

• Short-term appointment processes & workflows
• Review and reminders regarding payment forms
• Faculty lookup in myHR
Contracted Services Form & Visitor’s Expense Report
Job Aids

• Knowledge base job aids are available to for guidance in creating the **Contracted Services Form for U.S. Residents** and the **Visitor’s Expense Report**.

• Coming Soon: There will be examples and demonstration videos that will include instructions for completing the forms.
Exception Requests
Exception Requests

• **Procedure for Requesting a Policy Exception**

• Where to find exception request forms:
  - NUPortal
  - WCAS Finance Page
Faculty Appointment Lookup
Northwestern Job Summary

Choose Workforce Administrator from dropdown menu
Northwestern Job Summary

Choose myHR Administration
Northwestern Job Summary

Choose Appointments & Positions

myHR Administrative Dashboard

Welcome to the myHR Administrative Dashboard!

The myHR Administrative Dashboard is where you can find frequently used myHR Administrative pages in one central location. This is a dynamic dashboard and will be different from one person to the next, based on security access.

If you have any questions on how to navigate the Dashboard or if you would like to suggest a page be added, please contact myHR Help.

While each request will be reviewed, not all pages will be added in order to ensure the myHR Administrative Dashboard remains an asset. For issues with access, please contact myHR Security.
Northwestern Job Summary

Choose Northwestern Job Summary

myHR Administrative Dashboard

Welcome to the myHR Administrative Dashboard!

The myHR Administrative Dashboard is where you can find frequently used myHR Administrative pages in one central location. This is a dynamic dashboard and will be different from one person to the next, based on security access.

If you have any questions on how to navigate the Dashboard or if you would like to suggest a page be added, please contact myHR Help.

While each request will be reviewed, not all pages will be added in order to ensure the myHR Administrative Dashboard remains an asset. For issues with access, please contact myHR Security.
Northwestern Job Summary

Review list of records

<table>
<thead>
<tr>
<th>Empl ID:</th>
<th>Position</th>
<th>Type</th>
<th>Job Code</th>
<th>Description</th>
<th>Effdt</th>
<th>End Date</th>
<th>Dept</th>
<th>Future Dated Rows</th>
</tr>
</thead>
<tbody>
<tr>
<td>1010101</td>
<td>FAC</td>
<td>00040000</td>
<td>100022</td>
<td>Professor</td>
<td>09/01/2022</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1010101</td>
<td>FAC</td>
<td>00040001</td>
<td>100202</td>
<td>Professor</td>
<td>09/01/2021</td>
<td>08/31/2023</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Northwestern Job Summary

Click Nw Job Summ2 to review details
Job Data

Click Job Data, enter employee ID or name
# Job Data

![Job Data Screen](image)

- **Effective Date:** 09/01/2022
- **Effective Sequence:** 1
- **HR Status:** Active
- **Payroll Status:** Active
- **Position Number:** 00040000
- **Position Entry Date:** 07/01/2017
- **Regulatory Region:** USA
- **Company:** NWU
- **Business Unit:** NWUNV
- **Department:** 273501
- **Department Entry Date:** 07/01/2017
- **Location:** 1187
- **Establishment ID:** 001
- **Deptid Group:** 273500
- **Parent Deptid:** 273500
- **Last Start Date:** 07/01/2017
- **Expected Job End Date:** 07/01/2017

- **Empl ID:** 1010101
- **Empl Record:** 0
- **Action:** Position Change
- **Reason:** HRS - Change in Hrs/Percent
- **Job Indicator:** Primary Job
- **Current:** False

- **Position Management Record:**
  - Date Created: 08/25/2022
  - Northwestern University
  - Chemistry; Judd A. and Marjorie Weinberg College of Arts and Sciences
## Job Data

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date:</td>
<td>09/01/2022</td>
</tr>
<tr>
<td>Action/Reason:</td>
<td>HRS - Change in Hrs/Percent</td>
</tr>
<tr>
<td>Position Type:</td>
<td>Faculty</td>
</tr>
<tr>
<td>Position Category:</td>
<td>Regular</td>
</tr>
<tr>
<td>Appointment End Date:</td>
<td>08/31/2024</td>
</tr>
<tr>
<td>Sched Pay Periods:</td>
<td>12.0</td>
</tr>
<tr>
<td>Percent Full Time:</td>
<td>100.00</td>
</tr>
<tr>
<td>Annual FTE Salary:</td>
<td>75,000</td>
</tr>
<tr>
<td>Appointment Indicator</td>
<td></td>
</tr>
<tr>
<td>Appointment Start Date:</td>
<td>07/01/2017</td>
</tr>
<tr>
<td>Exclusion Merit Base Sal:</td>
<td></td>
</tr>
<tr>
<td>Standard Hours:</td>
<td>37.50</td>
</tr>
<tr>
<td>Position End Date:</td>
<td></td>
</tr>
<tr>
<td>Contract Period (Mths):</td>
<td>9</td>
</tr>
<tr>
<td>Monthly Cont Rte:</td>
<td>8333.33</td>
</tr>
<tr>
<td>WorkGroup:</td>
<td></td>
</tr>
<tr>
<td>Annual Renewable</td>
<td></td>
</tr>
<tr>
<td>Schedule Cd:</td>
<td></td>
</tr>
<tr>
<td>Effective Sequence:</td>
<td>1</td>
</tr>
<tr>
<td>Career Path:</td>
<td>Tenure Track</td>
</tr>
<tr>
<td>Academic Rank:</td>
<td>Professor</td>
</tr>
<tr>
<td>Update Career Path:</td>
<td></td>
</tr>
<tr>
<td>Primary Role:</td>
<td></td>
</tr>
<tr>
<td>Acad Appt Type:</td>
<td>Primary</td>
</tr>
<tr>
<td>Job Indefinite End:</td>
<td></td>
</tr>
</tbody>
</table>
Thank you!