Job Aid: Pediatrics Institute Benefits Lookup

Overview:
The Pediatrics Institute Benefits Lookup is designed to allow users to review the prior 12 months of labor earnings and actual cost of benefits deductions for physicians who have a job record with the Pediatric Institute as the HR Company. This dashboard is designed to assist in the preparation of sponsored research budgets for proposal submission and for cost management on existing awards and projects.

Navigating to the Dashboard:
1. Click here to login to Emory Business Intelligence
2. Click on the Dashboards menu and locate the FMS – Sponsored folder
3. Locate the Pediatrics Institute Benefits Lookup dashboard (dashboards are listed in alphabetical order)
Prompting the Dashboard

Overview

The Pediatrics Institute Benefits Lookup has one prompt, Employee. The prompt is limited to physicians having at least one job record where the Pediatrics Institute is the HR Company. The Employee prompt is a concatenation ofEMPLID and Name.

Selecting Prompts

- Click on the drop down menu for the Employee prompt

- Click on the words More/Search which opens a dialog box that allows you to search for prompt values.
- From the drop down menu next to Name, select Contains
- Uncheck the box next to Match Case
• **Enter** the name, or portion of the name, of the physician(s) you would like to select
• **Click on** the **Search** button

![Select Values window with a search for Mooney.

• **Double click** on the name(s) of the physician(s) you’d like to select to add them to the **Selected** list
• **Click** the **OK** button to populate the prompt

![Select Values window with Mooney James John selected.

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After making your prompt selection, **click on the Apply button** to execute the report based on your selection.

*Note: To verify that report has been executed, look for your prompt selections in the Prompts Selected area beneath the prompt.*

**PROMPTS SELECTED**
Employee: 0424947- Mooney, James John

*Note: Users are able to select more than one Employee.*

**PROMPTS SELECTED**
Employee: 0420302- Dureau, Katherine P; 0420426- Shah, Pareen; 0424947- Mooney, James John
Understanding the Report

Overview
This dashboard will provide a pivot table displaying earnings and actual employer paid benefits costs by employee, by month for the prior 12 months. The dashboard provides two views, a summary view showing total earnings and total employer paid benefits by month; and a benefits detail view which shows the breakdown of employer paid benefits by month, by benefit type.

Report Content
- Summary View
  - Columns Visible by Default
    - **Employee Id & Name**: The concatenation of an individual’s employee Id (EMPLID) and their name as found in PeopleSoft HR (eg: XXXXXXX – Doe, Jane)
    - **Accounting Period Desc**: The concatenation of the accounting period number and the name of the corresponding month (eg: PD 01 – September)
    - **Fiscal Year**: The fiscal year to which the earnings and benefits amounts displayed belong
    - **Earnings Amount**: The amount of salary posting to the ledger for the employee in a given accounting period. This amount includes employee paid benefits amounts.
    - **Employer Paid Benefits Amount**: The cost incurred by Emory University and/or the Pediatrics Institute for the employee’s benefits in a given accounting period.
  - Columns Excluded by Default
    - **HR Department Id & Desc**: The concatenation of the Department Id and Description for the employee’s home department as recorded in PeopleSoft HR
    - **Charged Department**: The concatenation of the Department Id and Description for the department to which an employee’s labor costs posted
    - **SpeedType**: The 10-digit entry key corresponding to the chartfields to which an employee’s labor costs are charged
    - **SpeedType Desc**: The description given to the SpeedType
    - **Employer Paid Benefits Type**: The description of the type of benefit for which Emory University has incurred a cost (eg: 403b Basic Match, Dental Plan, etc.)
    - **Project**: The ID and Description assigned to the project to which an employee’s labor costs are charged
    - **Activity Id**: The ID assigned to denote the project year or project activity to which an employee’s labor costs are charged

- Benefits Detail View
  - Columns Visible by Default
    - **Employee Id & Name**: The concatenation of an individual’s employee Id (EMPLID) and their name as found in PeopleSoft HR (eg: XXXXXXX – Doe, Jane)
    - **Employer Paid Benefits Type**: The description of the type of benefit for which Emory University and/or the Pediatrics Institute has incurred a cost (eg: 403b Basic Match, Dental Plan, etc.)
    - **Accounting Period Desc**: The concatenation of the accounting period number and the name of the corresponding month (eg: PD 01 – September)
    - **Fiscal Year**: The fiscal year to which the earnings and benefits amounts displayed belong
- **Employer Paid Benefits Amount:** The cost incurred by Emory University for the employee’s benefits in a given accounting period.
  - **Columns Excluded by Default**
    - **Earnings Amount:** The amount of salary posting to the ledger for the employee in a given accounting period. This amount includes employee paid benefits amounts.
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    - **SpeedType:** The 10-digit entry key corresponding to the chartfields to which an employee’s labor costs are charged
    - **SpeedType Desc:** The description given to the SpeedType
    - **Project:** The ID and Description assigned to the project to which an employee’s labor costs are charged
    - **Activity Id:** The ID assigned to denote the project year or project activity to which an employee’s labor costs are charged
Dashboard Screen Shots

Summary View:

Note: Employee Id & Name has been obscured due to labor data security requirements

Benefits Detail View:

Note: Employee Id & Name has been obscured due to labor data security requirements

Dashboard Security

- Managed labor security has been applied to this dashboard. In order to view results for an employee, users must have labor data access to the HR Operating Unit or the HR Department of the employee they wish to view.
  
  o Click here for the Labor Data Access Request Job Aid