

Procedure 3501 PR.22

Non-Employees: Directory Listing and Access Privileges

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1 – Non-Employee Privileges

Overview

In order to complete business tasks for the University, a consultant or other non-employee associated with your organization may have a legitimate need for access to one of the following:

- University ID card, for building access or other identification purposes
- e-mail account
- Meeting Maker
- remote access dial-in
- Oracle administrative and financial systems
- library privileges.

In addition, in some cases it is appropriate for a non-employee to be listed in the University directory.

To receive any of the above access privileges or to be listed in the University directory, the individual must have a record in the Human Resources database.

Non-Employee Categories

Depending on the specific circumstances, it may be appropriate to provide one or more of the above privileges to the following types of non-employees:

- consultant
- temporary employee hired via an employment agency
- hospital affiliate
- unpaid visiting or research fellow

- unpaid postdoctoral fellow
- Corporation member
- other non-employee associated with Yale.

Note: Procedures for retirees and their spouses are not included in this document. Contact the Benefits Office for information.

If you are uncertain whether it is appropriate for a specific non-employee to obtain access privileges or directory listing, contact your transaction support center or Faculty Affairs office for assistance.

Spouse ID Cards

A spouse of a faculty or staff employee may obtain a University affiliate ID card if the employee HR database record includes the spouse as a Contact. No additional HR data entry is required. Refer to the [ID Center](#) web site for more information regarding spouse ID cards.

2 – Create HR Database Record

Purpose

In order for a non-employee to receive any of the University privileges described above, the individual must have an active record in the Human Resources database, with the **Type** field set at **Employee**.

Data from the HR database is used to determine eligibility for a specific privilege, and to set up the privilege.

How Data is Organized in the Database

When you create a record for a non-employee in the Human Resources database, you are actually creating three records. The database organizes information about the individual into the following kinds of records:

- **People:** personal information about the individual
- **Address:** individual's address and phone number
- **Assignment:** information about the individual's relationship with the University (e.g., consultant, associate)

The arrangement of data entry fields is based upon this organization.

On the screen, you see these records in **forms** that are grouped as follows:

From this form...	Access these forms...
People	<ul style="list-style-type: none">• Address• Assignment

Although the forms you look at on the screen contain a large number of regions and fields that serve many purposes, when you create a Human Resources record for a non-employee you will only enter data in the forms, regions and fields listed in this section.

Prevent Duplication of Records

Each individual has only one **People** record in the Human Resources database, but an individual may have more than one **Address** or **Assignment** record.

Do **not** create duplicate **People** records.

If more than one **People** record is created for an individual, serious problems can result, including:

- incomplete and/or outdated information associated with each record
- tax problems

- reimbursement errors
- reporting errors

If an error message tells you that the name or Social Security number you have entered already exists in the database, do **not** continue with data entry.

- Instead, re-check your information. If your responsibility allows you to view the existing database record, determine if you are dealing with the same person. If you cannot view the record, and need assistance in determining if the individual already has a record in the database, contact Human Resources Transaction Processing, 2-3801.

If the individual already has a database record, because of prior or current employment, study, or other affiliation with Yale, proceed as follows:

If the individual already has a database record...	Then...
with no active assignment record (e.g., a student, former student, former employee with no current Yale assignment)	<ul style="list-style-type: none"> • if your responsibility allows you to access and update the record: <ul style="list-style-type: none"> • verify the existing personal data, including home address; update as needed. • if the Type displayed is Ex-employee, follow rehire procedure to update the field to Employee. • create a new assignment record as described below. <p>if you cannot access the employee's record or do not have access to the rehire procedure to update Type to Employee, contact Human Resources Transaction Processing, 2-3801</p>
with a current assignment from another department	<ul style="list-style-type: none"> • do not make any changes in the existing personal data (this should be done by the employee's primary department). • contact the employee's primary department to determine if a secondary assignment should be created by the primary department., e.g., for directory listing of the additional title, and/or for reporting purposes.

Effective Date

All information is tied to an **effective date**. You must set the correct effective date for every record you create and every update you make to a record.

When you create a new non-employee record, use an appropriate effective date.

Correction vs. Update

When you override or change data, the Human Resources database asks you to choose between two options: **Correction** or **Update**.

- If you are creating a new record or simply correcting a data entry error, there is no need to retain generic default data (e.g., Organization: Yale University) or erroneous data. In such cases you may override existing data. Choose the **Correction** option. **Correction** deletes the previous data and replaces it with the new data you are entering.
- For many types of data, when you enter a change you should retain a history of the previous information. For example, when an individual changes his/her name it is important that the prior name record is retained. Choose the **Update** option. **Update** retains the previous data record and adds a new record for the new data you are entering.

People: Personal Data About the Employee

People information is divided into several sections, or **regions**. Only a few of the regions are needed to create a non-employee record. Select the regions shown below, and enter the corresponding personal data about the individual as follows.

- Use mixed case for all names, addresses and other descriptive information.

Region	Field	Data to enter
People - top of form	Name:	refer to University guidelines for data entry of names (see Standards for Data Entry)
	Last	as provided by the individual
	First	as provided by the individual (but no nicknames)
	Title	Mr, Ms , etc. (recommended)
	Suffix	Jr, II , etc. (no periods)
	Middle	name or initial (recommended)
	Male or Female	must be selected
	Type	Employee (this value is required by the system)
	Social Security No.	9 digits; include hyphens
Personal Information	Birth Date	dd-mmm-yyyy (e.g., 01-APR-1969)
Additional Personal Details flexfield	Print Person in Directory	Normally, non-employees are not listed in the University directory. To have such individuals' names printed in the directory, enter Y (Yes) . If your organization does not wish to have the non-employee listed in the University directory, leave this field blank.

Address: Individual's Home Address and Phone Number

1. Enter the individual's home address, including zip code. For address **Type**, enter **Home**.
 - Follow University guidelines for address format (see [Standards for Data Entry](#)).
 - Entering the zip code will automatically populate the city, state and county.
2. Enter the telephone number (optional); include hyphen.
 - Include area code if not 203; format nnn-xxx-nnnn.

Assignment: Data About the Relationship to Yale

Assignment information is divided into several regions. Only a few of the regions are needed for non-employees. Select the regions shown below, and enter the corresponding data about the individual's relationship to Yale, as follows:

Region	Field	Data to enter
Assignment - top of form	Organization	If your department has more than one organization, select the appropriate organization for the individual.
	Group	This field is connected to a group of fields called the People Group Flexfield . Enter the following flexfield data: Bargaining Unit: NON Tenure: No Benefits Grandfathered: No Staff Pension: No Fringe Code: P After you enter data in the flexfield, the information is summarized in the Group field.
	Job	Choose one of the following: ASSOC: hospital affiliate, temporary agency employee, other non-employee associated with Yale CON: consultant FEL: visiting fellow, research fellow, other unpaid fellow PDF: postdoctoral fellow, if not paid via Yale <ul style="list-style-type: none"> • For PDFs paid via Yale, use the Faculty Data Collection Form and Faculty Appointment procedure.
Position	For ASSOC job category, choose one of the following: Associate: any Associate non-employee other than Hospital Resident Hospital Resident For CON job category, choose: Consultant For FEL job category, choose one of the following: Institute Fellow (Yale-New Haven Teachers Institute) Museum Fellow Research Fellow Research Fellow in Law Residential College Associate Fellow Visiting Fellow <ul style="list-style-type: none"> • If the appropriate position is not listed, contact Human Resources Information Systems, 2-9415. For PDF job category (unpaid), choose one of the following: Postdoctoral Fellow Postgraduate Fellow Predoctoral Fellow	

	Payroll	Unpaid
	Location	Campus
	Status	Active Assignment
Standard conditions	Working Hours	Enter the numeral 0 . This is a required value for non-employees.
	Frequency	Week
Statutory Information	Government Reporting Entity	Yale University
Salary Information	Salary Basis	Monthly
Additional Assignment Details flexfield	Term Start Date	Enter if available; use DD-MON-YYYY format.
	Term End Date	Enter if available; use DD-MON-YYYY format.

3 – Print a Data Report

Individual History Report

When all required data has been entered to create the new database record, a department administrator with appropriate responsibility may run and print an Individual History Report that summarizes the data.

Note: Currently, the Individual History Report can only be run by users who are able to view salaries.

Run the report as follows:

1. In the HR menu, select Individual History Report.
2. Enter the desired reporting criteria and detail sections.
3. Run the report.

Print the report(s), review for accuracy and file in your department files.

4 – Obtain Non-Employee Privilege(s)

Directory Listing

If the non-employee individual has an active assignment record in the Human Resources database as of 01-SEP, and the **Print Person in Directory** field contains a **Y (Yes)** value, the individual will be listed in the University directory for the academic year beginning that September. No other action is required.

ID Card

Once an **active** assignment record exists for the non-employee in the Human Resources database, the individual may go to the ID Center to obtain an ID card:

- Central/Science area: 264 Church Street; phone 432-0165, e-mail id.center@yale.edu
- Medical area: 333 Cedar Street, IE41; phone 785-4286

Net ID and E-Mail

Once the assignment record has been created in the HR database, User Accounts generates a net ID. The net ID becomes available the day after the HR record is created.

The individual must obtain a PIN to activate and use the net ID.

To obtain the PIN and set up e-mail, Meeting Maker or other user accounts, do one of the following. Note that authorized charging instructions must be submitted for e-mail and Meeting Maker accounts.

- **In-person request:**

The non-employee may go to User Accounts, 221 Whitney Avenue, 1st floor.

- **On-line request:**

A business manager or distributed support provider (DSP) may submit a request using online forms from the User Accounts [Email and Network Services Registration Forms](#) page.

In order to submit an on-line request, your name must appear on the User Accounts business manager or DSP list (see the User Accounts web site for details).

Contact user.accounts@yale.edu for more information or assistance.

Oracle Applications

Submit requests for access to Oracle financial and human resources applications via [Xtrain](#) for central campus users. For Medical School users, the department business manager handles access requests. Refer to Procedure [1601 PR.1](#) for detailed procedures.

Library Privileges

Individuals who hold valid Yale ID cards, other than casual employees, may obtain library privileges from the Library Privileges Office at Sterling Library.

For more information, contact the Library Privileges Office, 432-1853.

5 – Modify or Cancel Privilege When No Longer Necessary

Request Change or Cancellation

Determine appropriate action as follows:

If...	Then...
the individual no longer needs access to a business application	<ul style="list-style-type: none">• submit a request for deletion of access via the designated training and access coordinator for your department.
the individual needs access to additional business application(s)	<ul style="list-style-type: none">• submit a request for access via Xtrain (central campus) or department business manager (Medical School).
the individual's relationship with the University is ending	<ul style="list-style-type: none">• if the individual has access to a University business application, submit a request for deletion of access via your training and access coordinator.• notify User Accounts at user.accounts@yale.edu that the individual's net ID and e-mail/Meeting Maker accounts should be cancelled.• if the individual has a University ID card, collect the card and return to the ID Center.

Request Termination of Database Record

If the individual's relationship with your organization is ending, notify your transaction support center or Faculty Affairs office that the pertinent Human Resources database assignment should be terminated.

The official version of this information will only be maintained in an on-line web format. Any and all printed copies of this material are dated as of the print date. Please make certain to review the material on-line prior to placing reliance on a dated printed version.