9.2 Hiring a New Employee

Purpose: Use this document for entering a new hire into the system.

Audience: Human Resources Specialist.

You must have at least one of these local college managed security roles:

- ZC HR Employee Maintenance
- ZZ HR Employee Maintenance
- ZZ SS Workforce Administrator

ZD HCM SOGI - View SOGI role is required for users to view Pronouns and SOGI on the Personal Data page.
Access to Add/Update Personal Data Biographical fields are given though the other roles listed above.

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

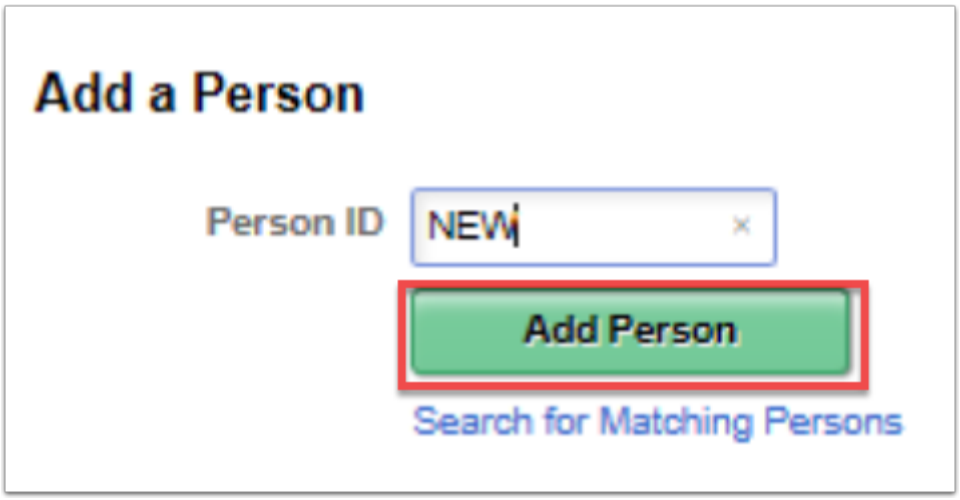
IMPORTANT: Before you begin this process, be sure to perform the Search Match process to verify if the person has an existing Employee ID. Refer to the **Run a Search Match** QRG.

Hiring a New Employee

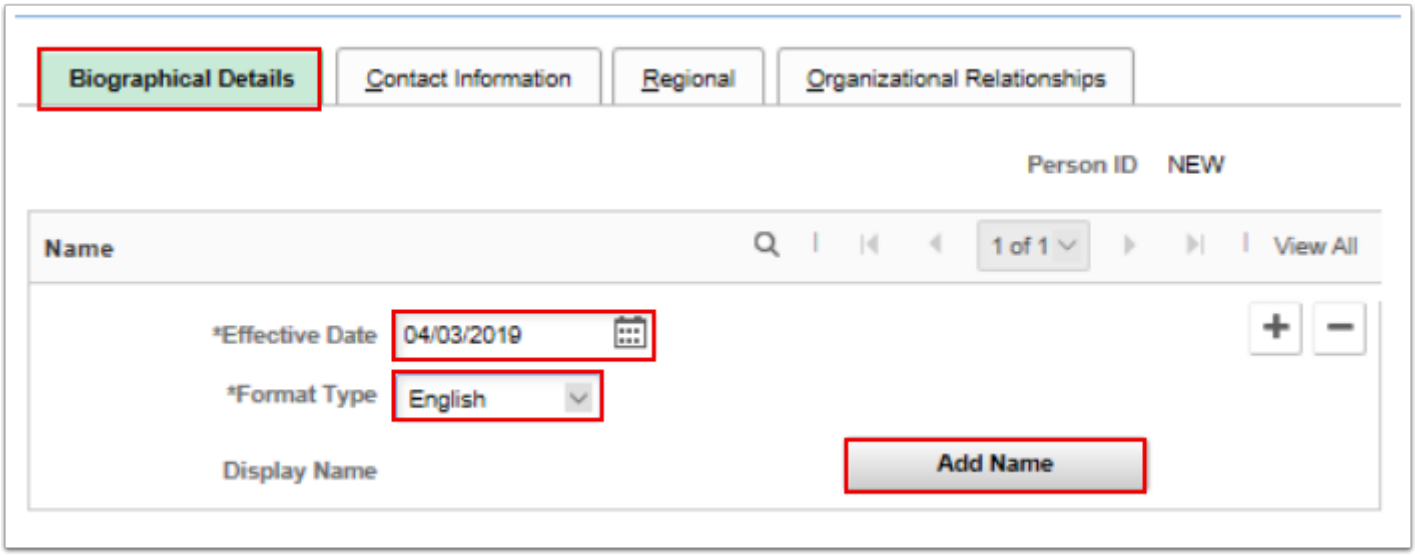
Add a New Employee (adding Bio Demo information)

Navigation: NavBar > Navigator > Workforce Administration > Personal Information > Add a Person

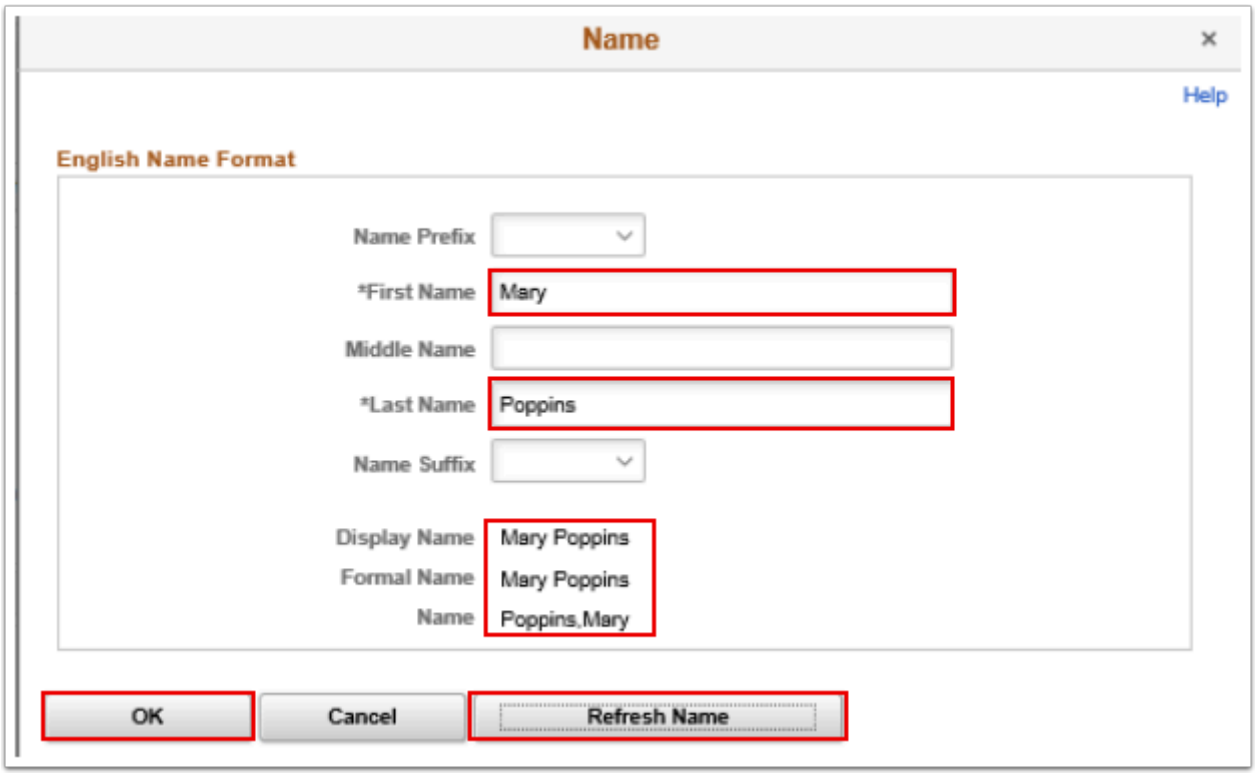
1. The Add a Person page displays.
2. The **Person ID** value will default to **NEW**. Leave as is if the person **does not** have an existing EMPL ID based on your Search/Match results.
3. If the person does have an existing **EMPL ID** found in the **Search Match** results, follow steps for adding a job instance.
4. Select **Add Person**.



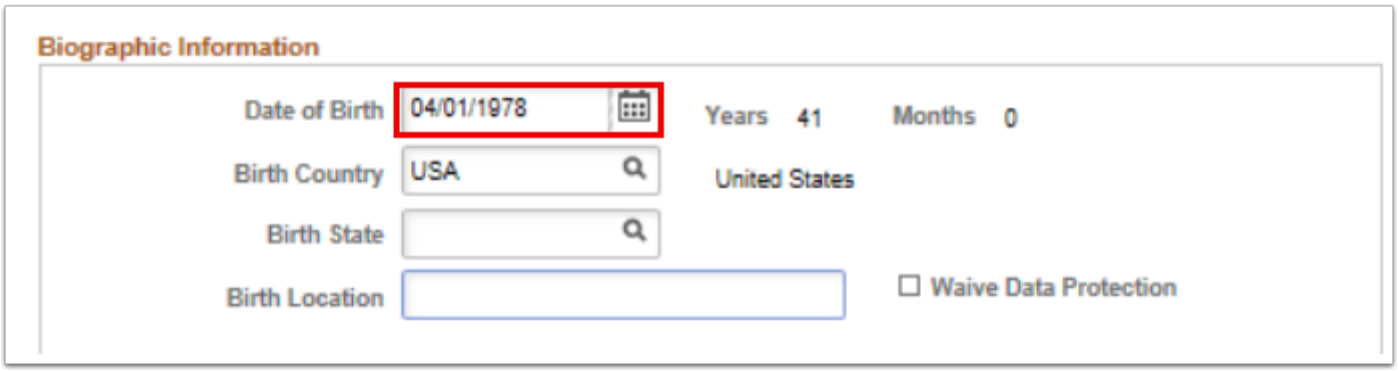
5. The Modify a Person page displays.
6. On the Biographical Details tab, the **Effective Date** will default to **Today's Date;** change if applicable. (This is the date the person will now exist in ctcLink, or if there is a Job or Institute assigned to the person here).
7. Select the **Format Type** from the drop-down menu and select **English**.
8. Select the **Add Name** button.



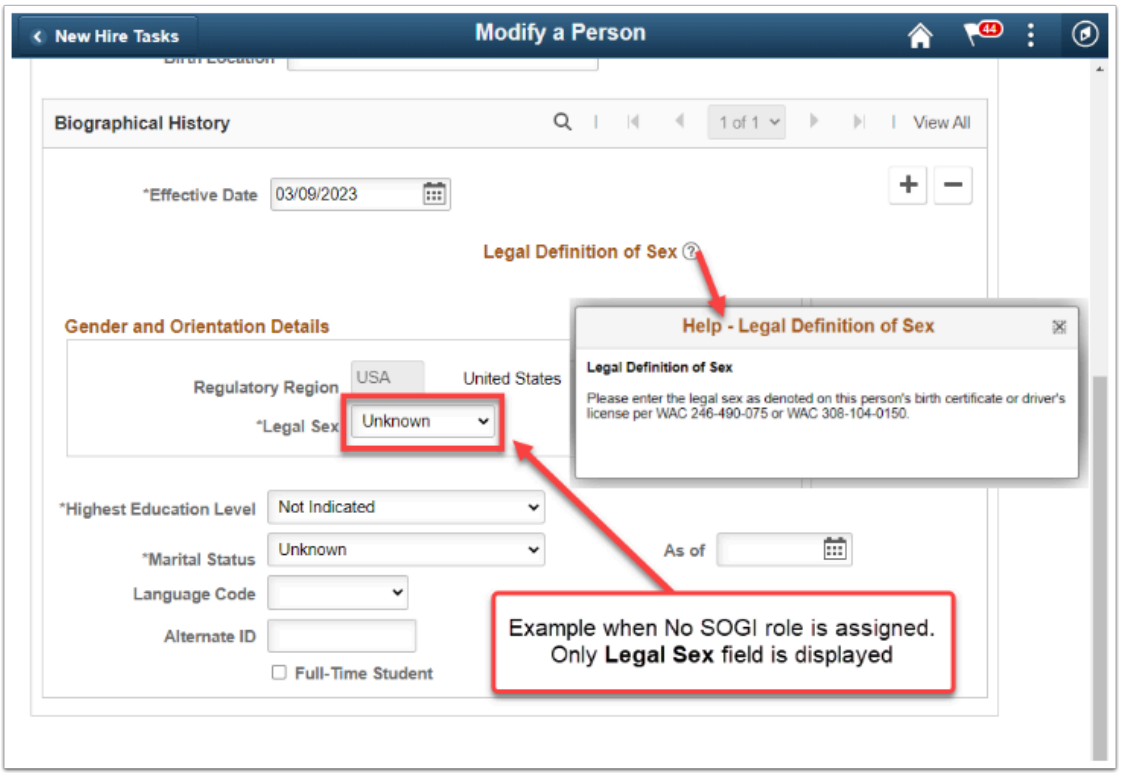
9. The Name pagelet displays.
10. Select the **First Name** field and enter appropriate values.
11. Enter appropriate value in the **Last Name** field.
12. Select the **Refresh Name** button.
13. Select **OK**.



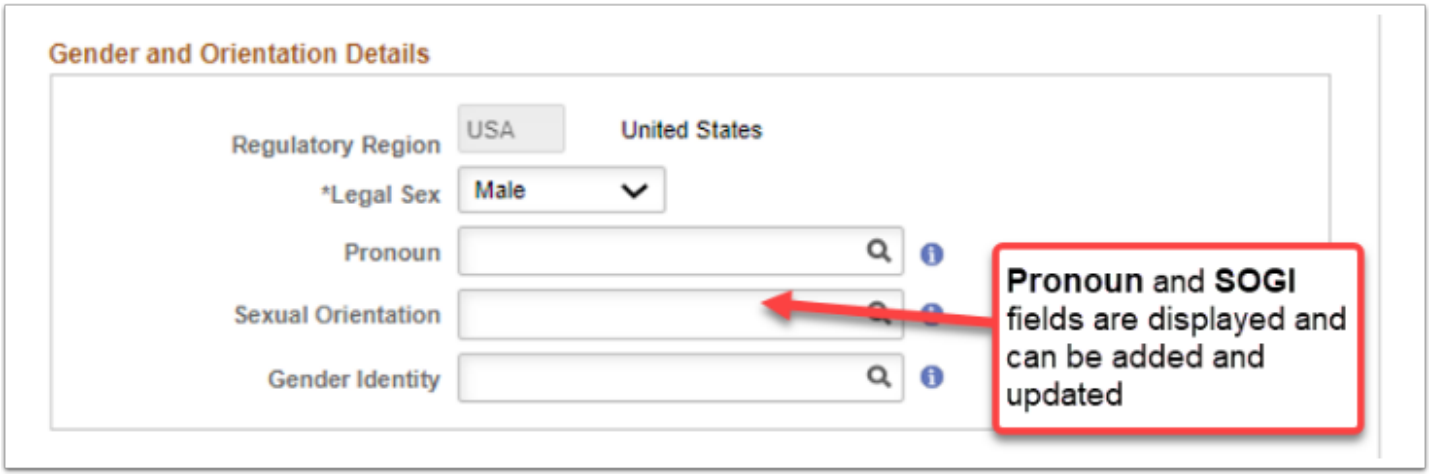
14. The Biographical Details tab displays with name.
15. In the **Biographic Information** section, select the **Date of Birth** field and enter the appropriate information.
16. **NOTE**: Leave the **Birth State** and **Birth Location** fields blank.
17. **Birth Country** auto populates to USA.



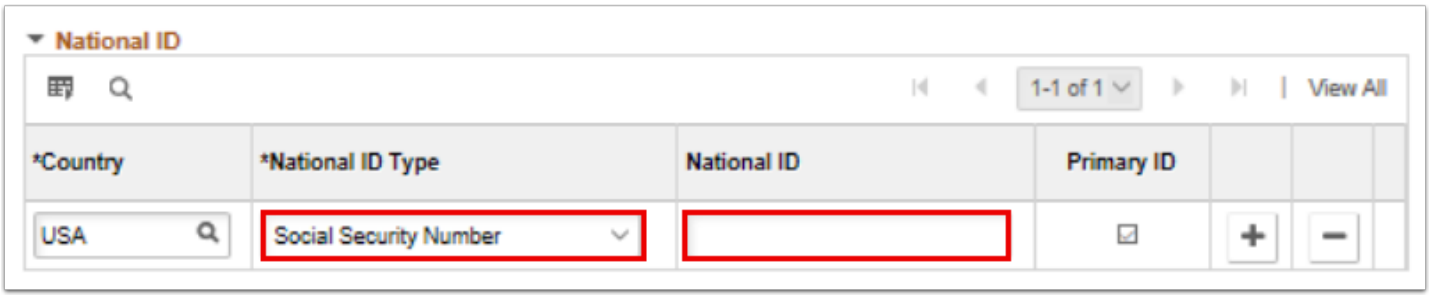
18. In the **Biographical History**, **Gender and Orientation Details** subsection, change the default value of the **Legal Sex** field from the default *Unknown* to the employee's Legal Sex. (To review **Legal Definition of Sex**, select the **?** icon to view a pop up window).
NOTE: If a user has the **ZD HCM SOGI** role and one of the other *Add/Update* roles listed at the top of the QRG, they may see a different layout on this page which displays the **Pronoun** and **SOGI** fields.



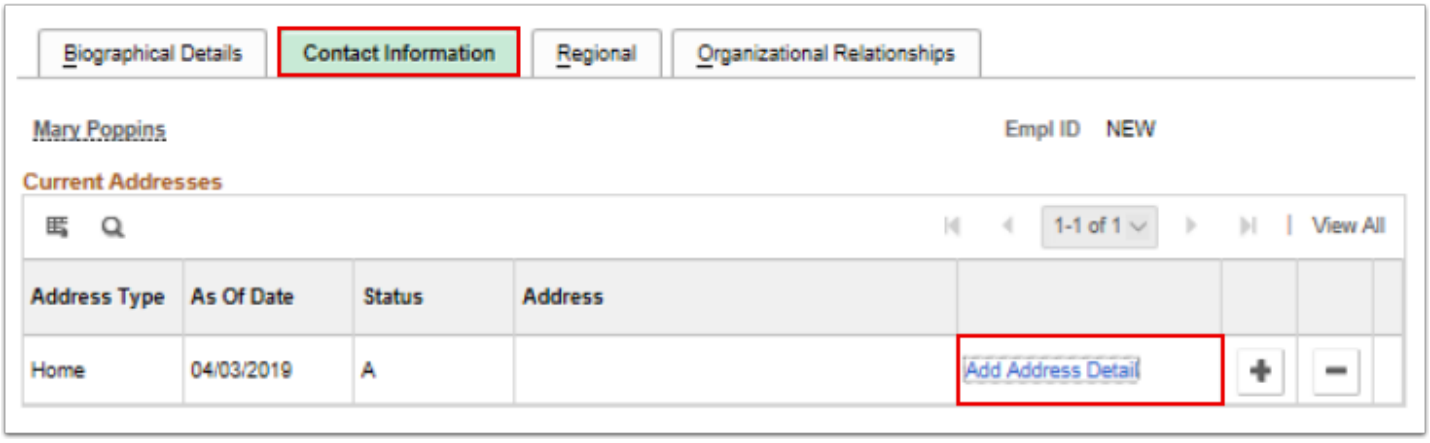
NOTE: If a user has the **ZD HCM SOGI** role and one of roles listed at the top of the QRG to *Add/ Update*, then they will see a different layout on this page which displays the Pronoun and SOGI fields, as seen below.



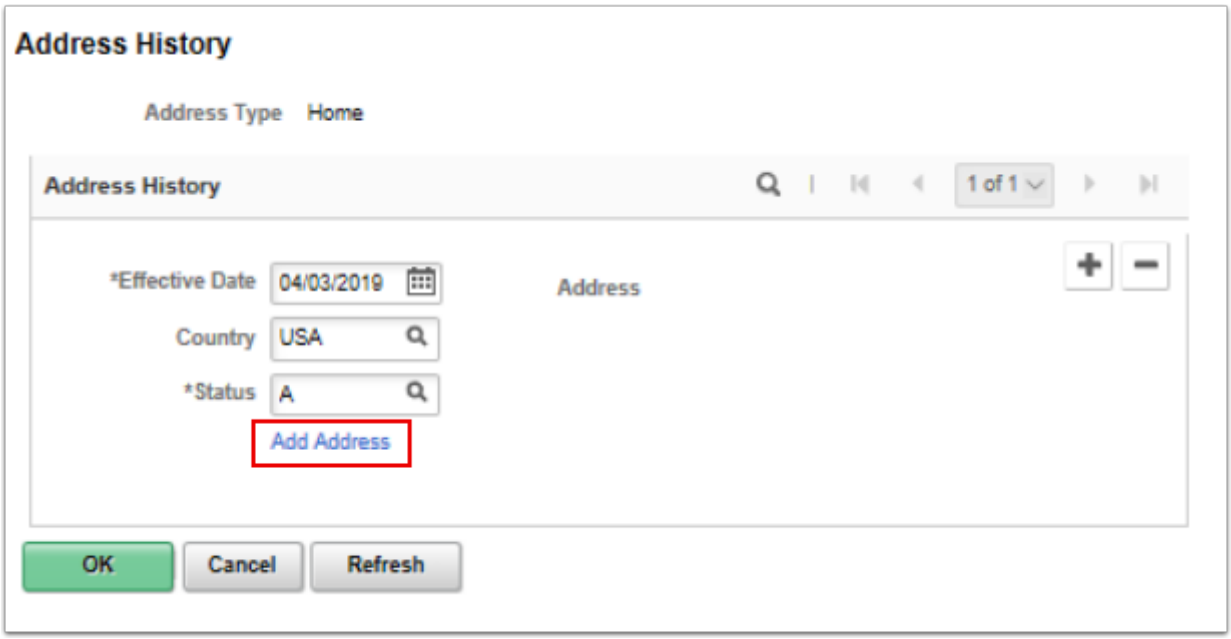
19. In the **National ID** section, select Social Security Number for the the **National ID Type.**
20. Enter the Social Security number into the **National ID** field.



21. Select the **Contact Information** tab.
22. In the Current Addresses section, select the **Add Address Detail** link.

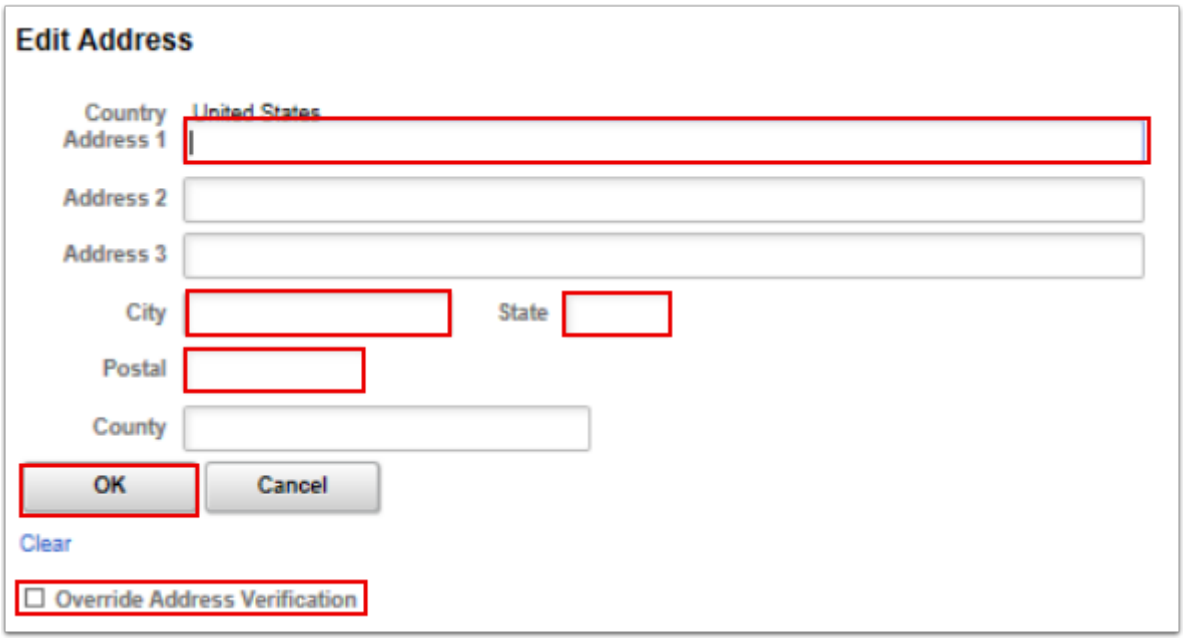


23. The Address History page displays.
24. Select the **Add Address** link.

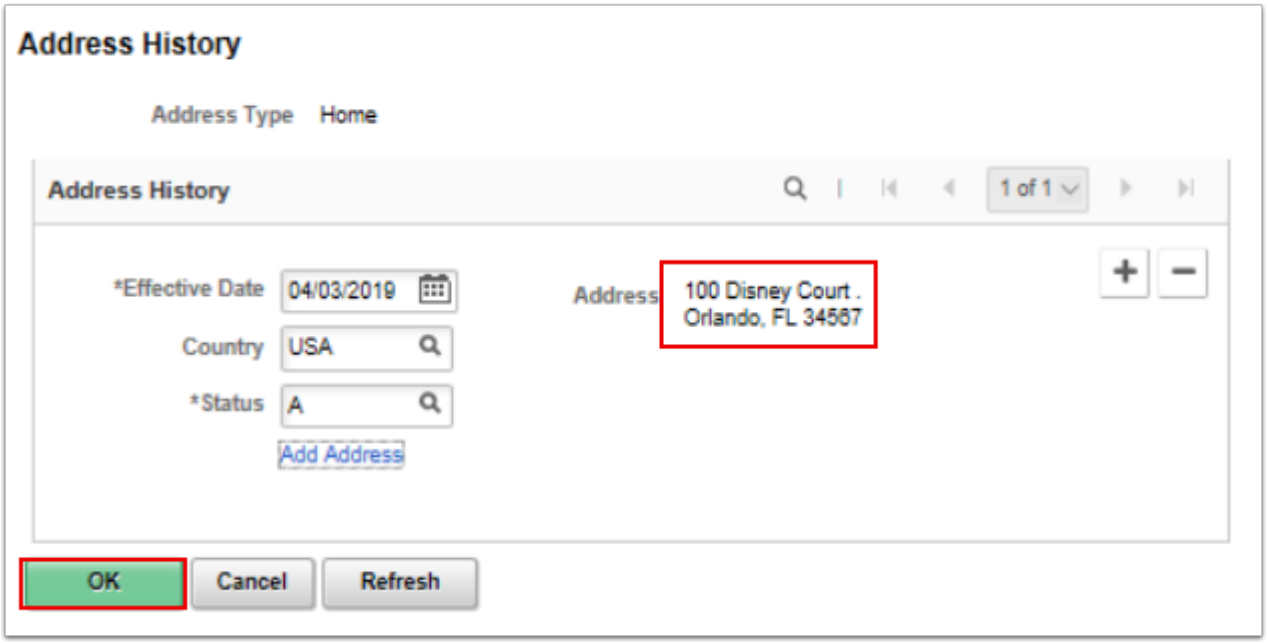


25. The Edit Address page displays.
26. Enter the **Street Address** on **Address Line 1** (if there is a PO Box, you can enter it on Address Line 2).

27. Enter the **City**.
28. Enter the **State**.
29. Enter the **Postal (Zip) code**.
30. The County should auto-populate based on your address.
31. If the system does not recognize the address it will list potential alternatives. Select the **Override Address Verification** box to bypass.
32. Select the **OK** button.

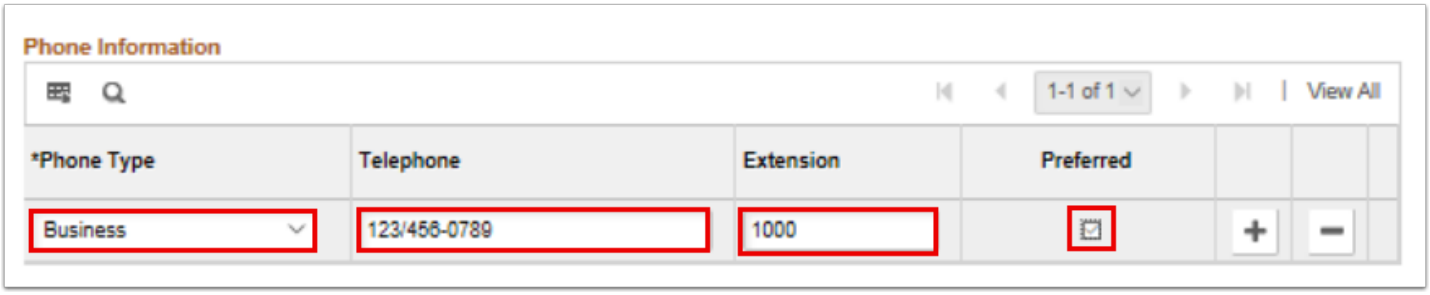


33. The Address History page displays with updated information.
34. Select the **OK** button.



35. The Contact Information tab displays.
36. Complete the **Phone Information** section:

a. Select the **Phone Type** from the drop-down menu.
b. Enter the **Telephone** number.
c. Enter an **Extension** (optional).
d. Select the **Preferred** check box.



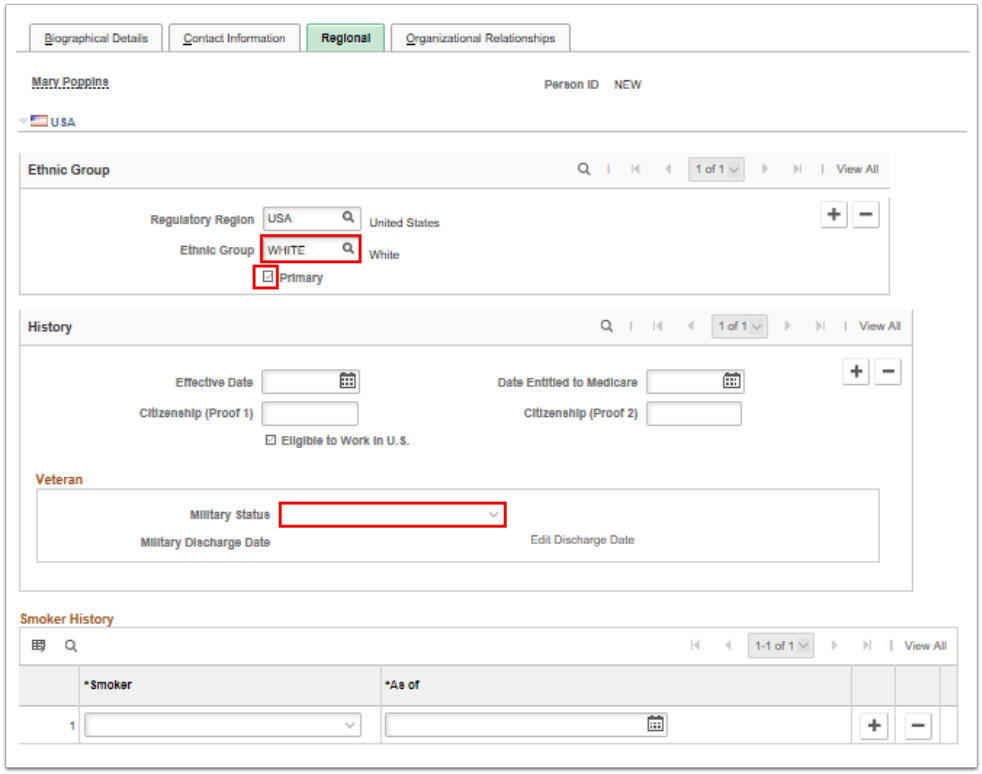
37. In the **Email Address** section, enter the details regarding the email account.
    a. Select the **Email Type** from the drop-down menu.
    b. Enter the **Email Address**.
    c. Select the **Preferred** check box.

IMPORTANT:
In order for new employees to receive email notifications through ctcLink (a vital part of the absence management process, etc.) their Primary Email Address needs to be set up in the **User Profile** area of PeopleSoft. ***You will not have access to this area***.

- However, you must add this Primary email address in the biographical area in addition to any other email addresses you may include. It does not need to be checked as Preferred but should be entered as **Campus**. Contact your Local Security Administrators at your college for this address.
- This is important as the **Primary** email address (e.g. Bsanders@sbctc.edu) drives **Workflow** and is located in the **User Profile** (security) area.
- **Local Security Administrators** may or may not have the ability to update the **User Profile** in PeopleSoft, however they will be able to tell you what the Primary email address will be.

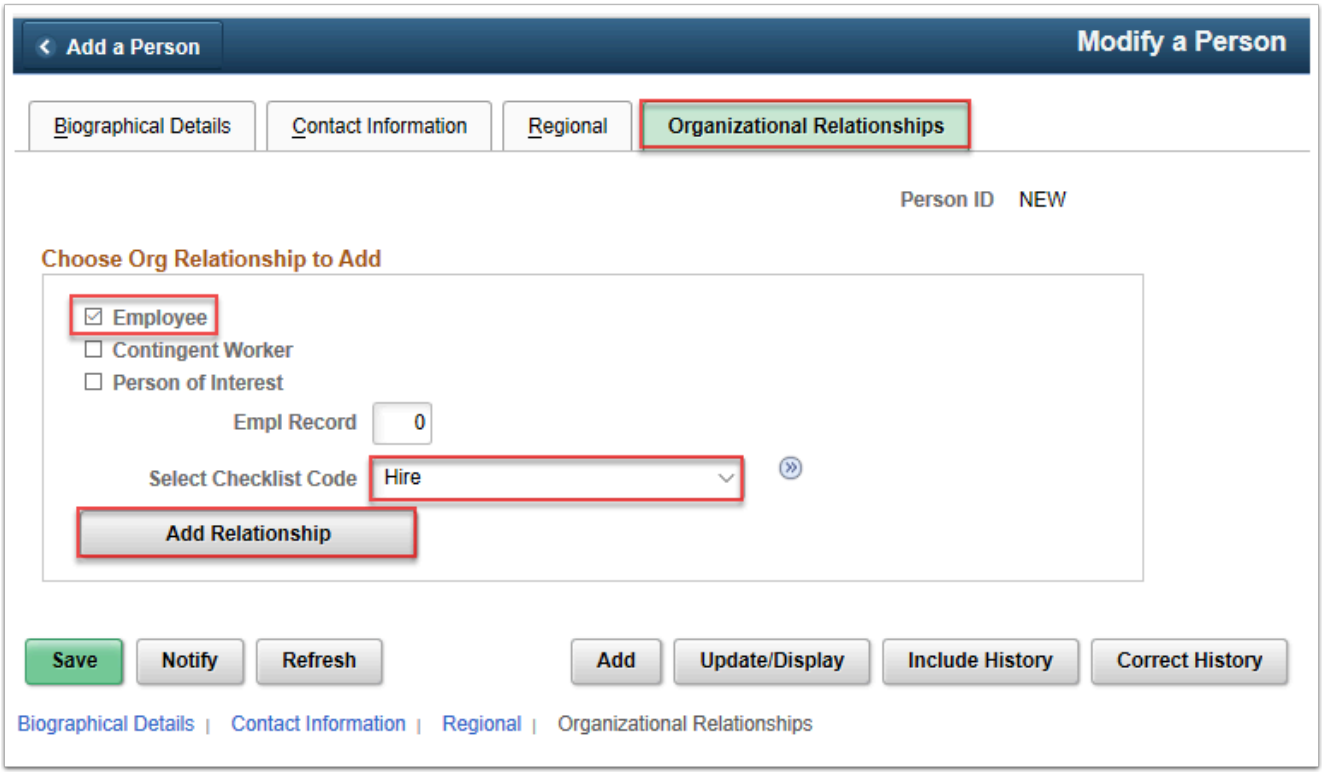
- Since the **User Profile** is automatically generated each night and is updated based on who was hired earlier that day, best practice is to add the employee record in HCM on the same day as the **Primary email address** is entered in the **User Profile** area.
- If it is not entered on the same day, and your Local Security Administrator does not have access to this area, they will have to log a Service Ticket and the State Board (SBCTC) ERP Support staff will update the User Profile. If they do have access, they an update the User Profile for you after the fact.
- To efficiently set up the primary email address both in the **User Profile** and in the **Biographical** areas, your college should develop and communicate an internal business process that will ensure that this setup is not missed when you on-board an employee.

38. Select the **Regional** tab.
39. The Regional page displays.
40. Select an **Ethnic Group** from the lookup icon.
41. Select the **Primary** checkbox.
42. In the **Veterans** section, select a **Military Status** from the drop-down menu.
43. If you select a **discharge related option**, the system will require the **Military Discharge Date**.
44. The option selected in the **Smoker History** gets displayed on the Additional Information page in Employee Self Service (ESS > Personal Details > Additional Information).

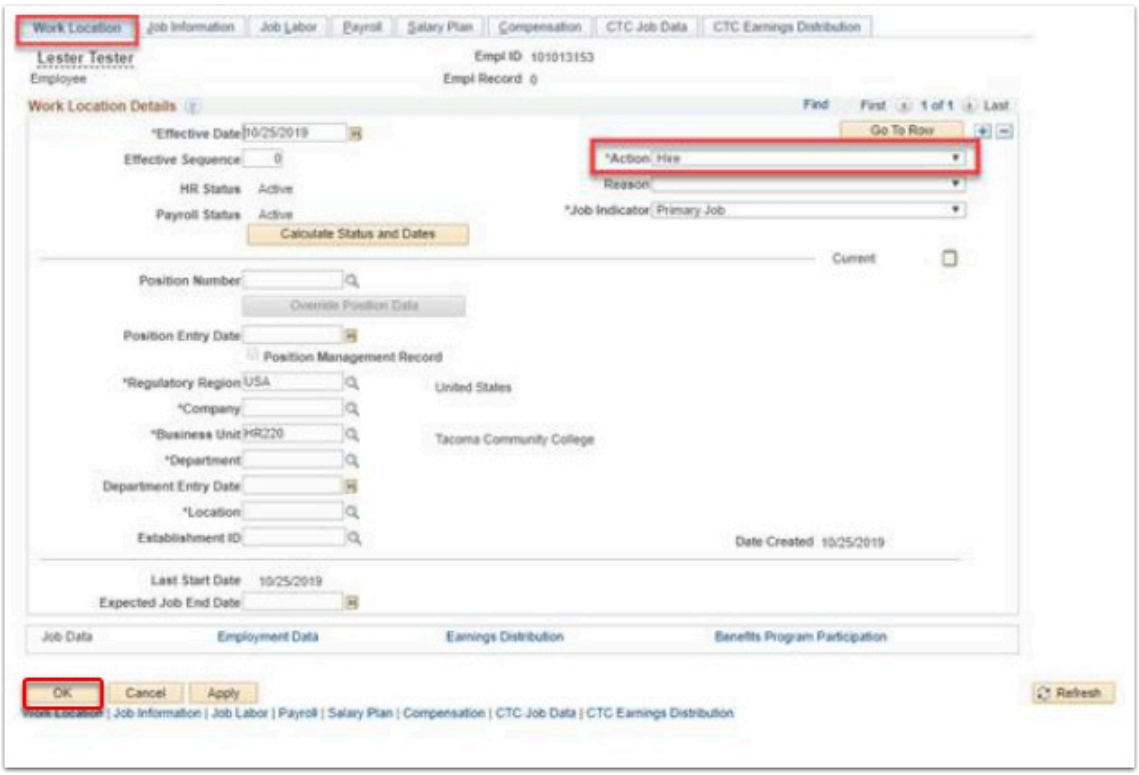


45. Select the **Organizational Relationships** tab.
46. The Organizational Relationships page displays.

47. Select the **Employee** checkbox.
48. Select **Hire** from the **Select Checklist Code** drop-down menu (*Optional*).
49. Select the **Add Relationship** button.



50. The Job Data page displays.
51. On the **Work Location** tab, in the **Work Location Details** section, notice the **Hire** is populated in the **Action** field.
52. Select **OK**.



53. You have successfully Added a New Employee to Biographical Details.

IMPORTANT: If employee information has been entered and saved before adding job data, you may search using the **Add Employment Instance** page. (Navigation: NavBar > Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance).

Adding a Job Instance (creating job data)

You must have at least one of these local college managed security roles:

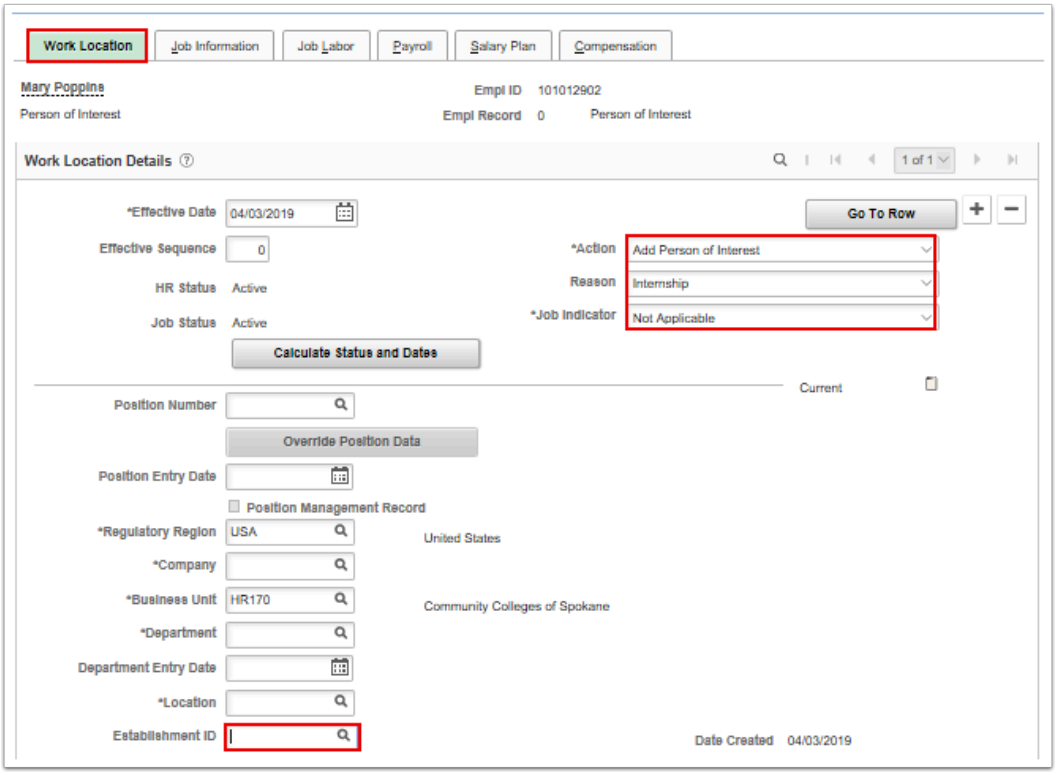
- ZC HR Employee Maintenance
- ZD HR Central Config VW
- ZD HR Admin View Job Data
- ZD Benefits Employee Data Inq
- ZD HR Employee Maintenance VW
- ZD HR Limited Person Job Info
- ZZ HR Employee Maintenance

- ZZ SS Workforce Administrator
- ZZ FWL HCM Pay Process

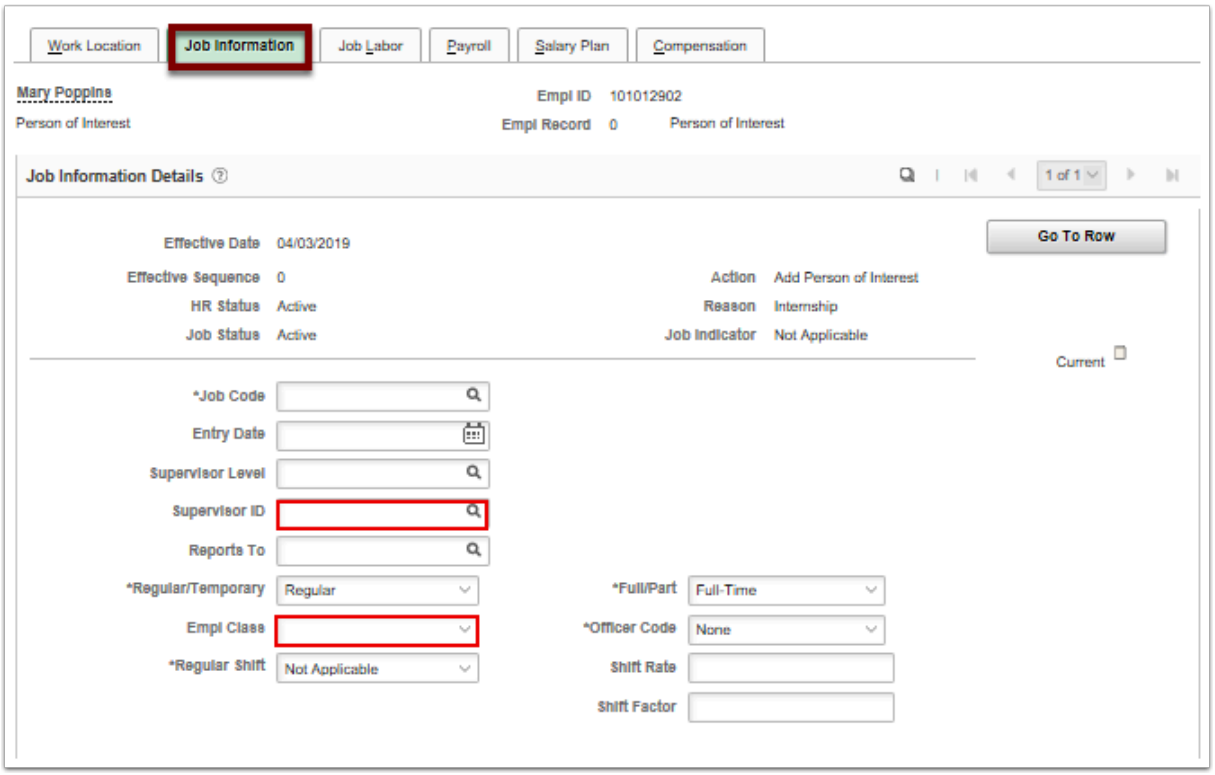
If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Workforce Administration > Job Information > Job Data

1. The Job Data search page displays.
2. Enter applicable **Search Criteria**.
3. Select the **Search** button.
4. The Job Data page displays.
5. In the Work Location tab, the **Effective Date** will default to today's date, change if needed.
6. **Effective Sequence** - set to 1.
7. Select **Add Person of Interest** from the **Action** drop-down menu.
8. Select **Reason** code from drop-down menu.
9. Enter **Not Applicable** under **Job Indicator** look icon.
10. Select or enter the **Establishment ID**.

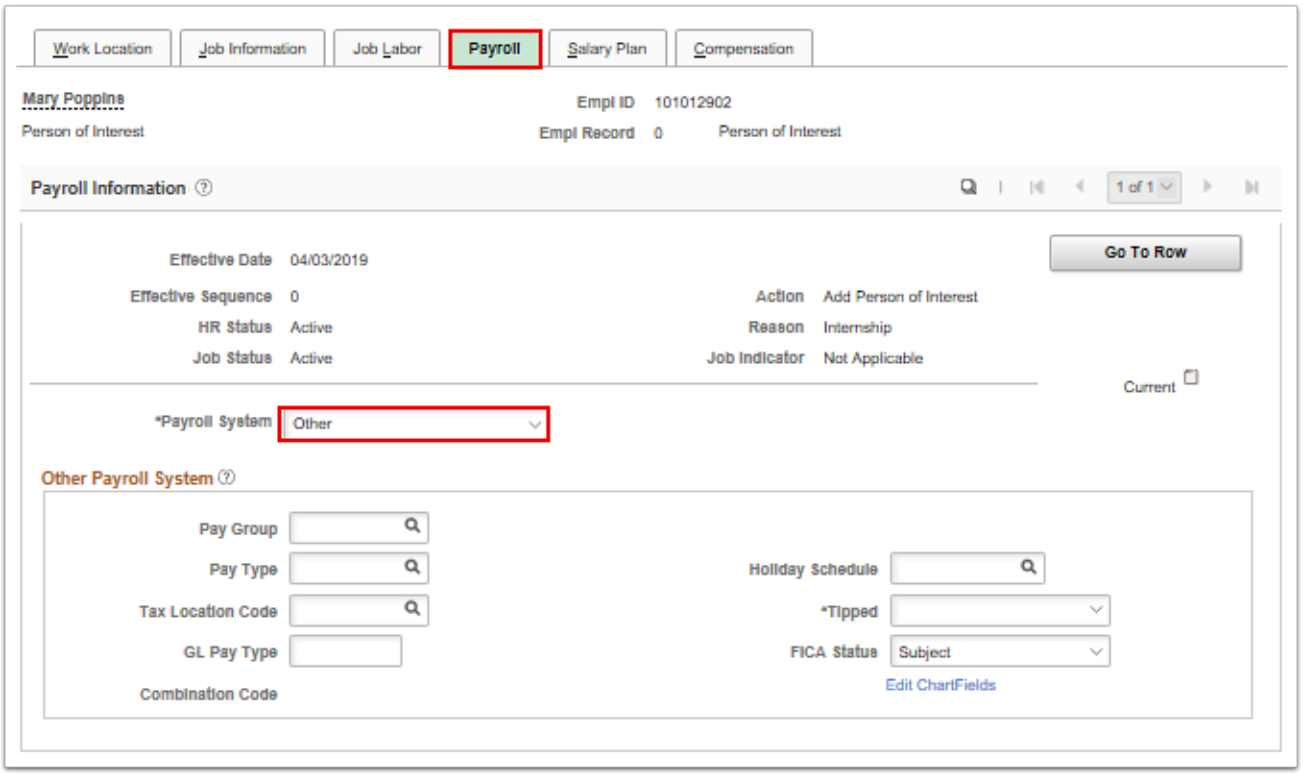


11. Select the **Job Information** tab.
12. The Job Information page displays.
13. Select the **Supervisor ID** lookup icon to select the supervisor for the new hire.
14. Select the **Empl Class** drop-down menu and select the appropriate classification for the person of interest.

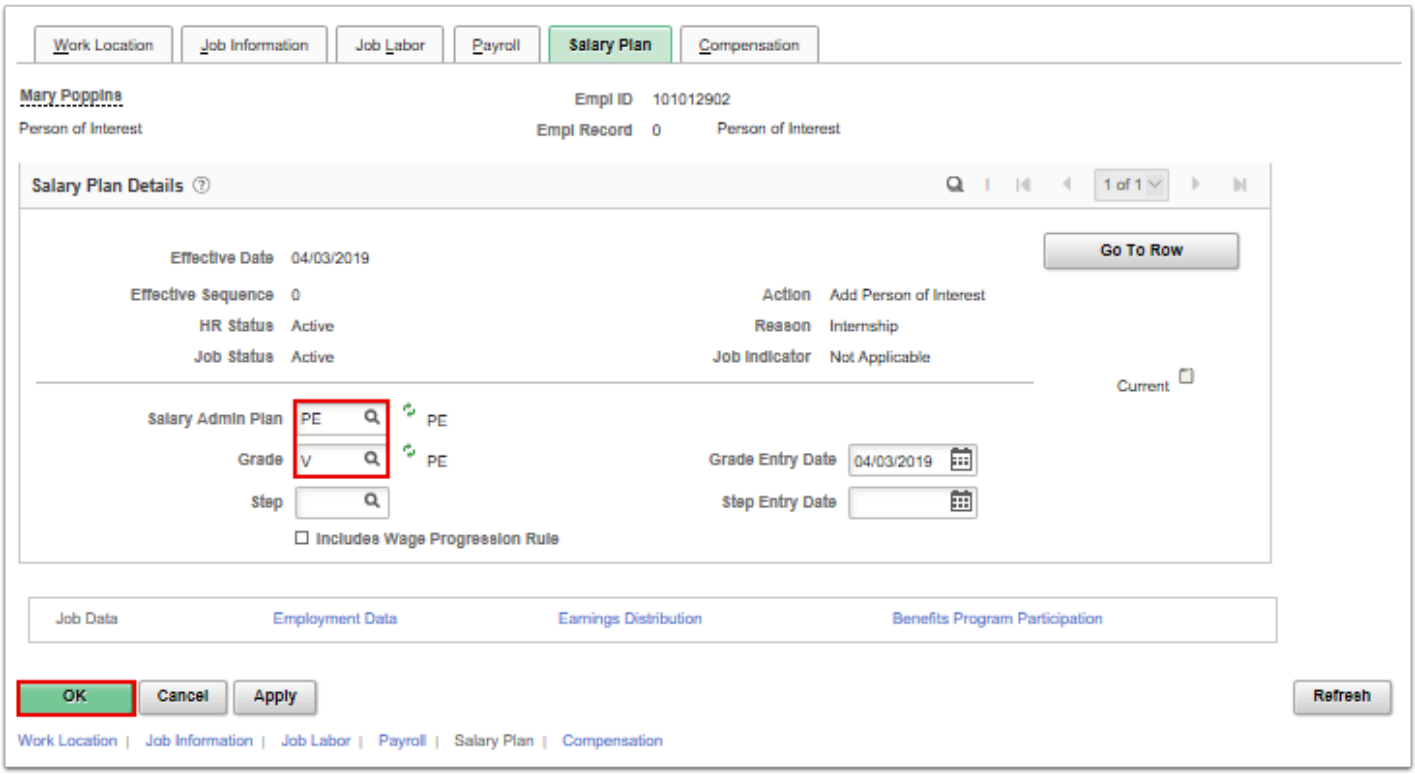


15. Select the **Payroll** tab.
16. The Payroll tab displays.
17. Change the default of **Payroll for North America** to **Other** for Payroll system.

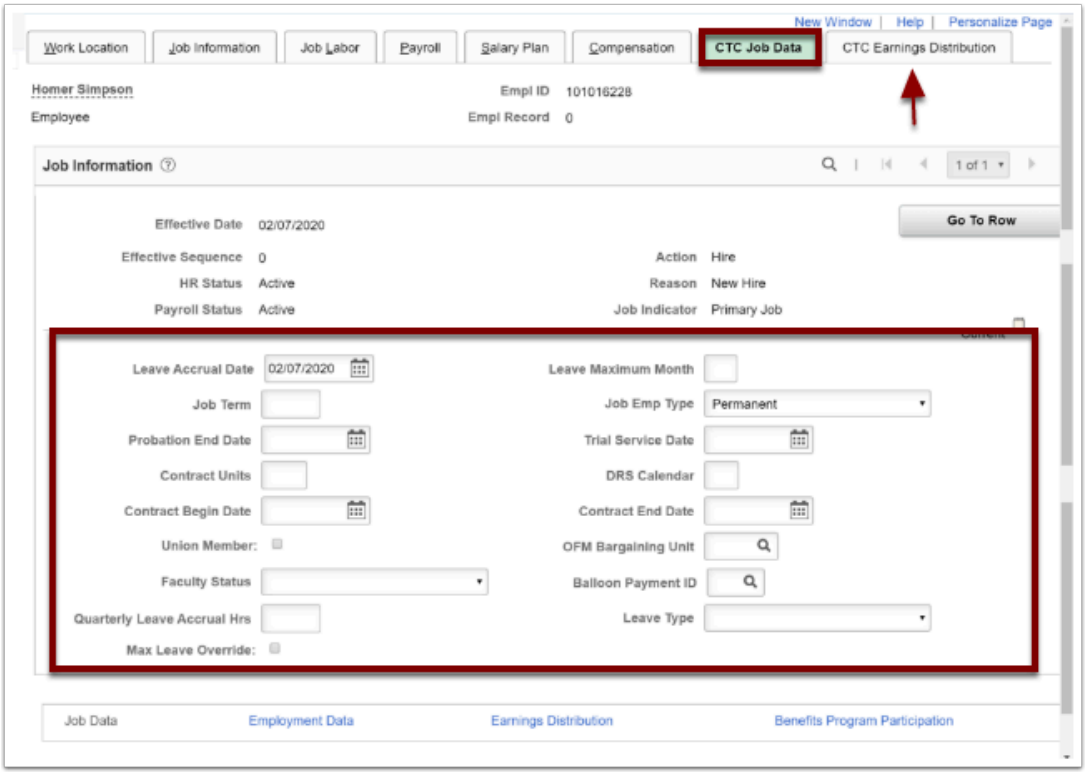
> **IMPORTANT**: For Volunteer/Person of Interest (POI) type employees, you MUST select the Payroll System of **Other** from the drop-down selection. This will cause the pay group field to be blank and prevent the employee data from pushing to Payroll.



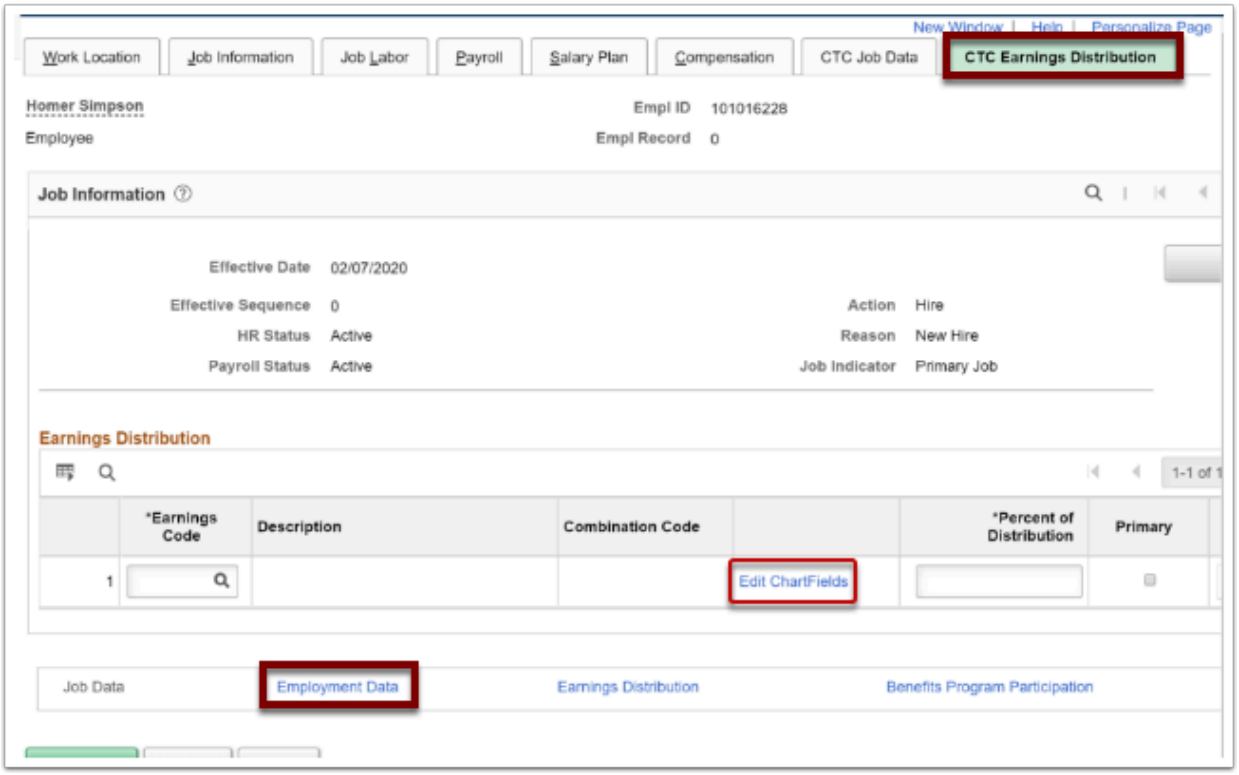
18. Select the **Salary Plan** tab.
19. The Salary Plan page displays.
20. The **Salary Admin Plan** defaults to **PE**.
21. The (**Salary) Grade** defaults to **V**.
22. Select the **OK** button.
23. The Work Location tab displays.



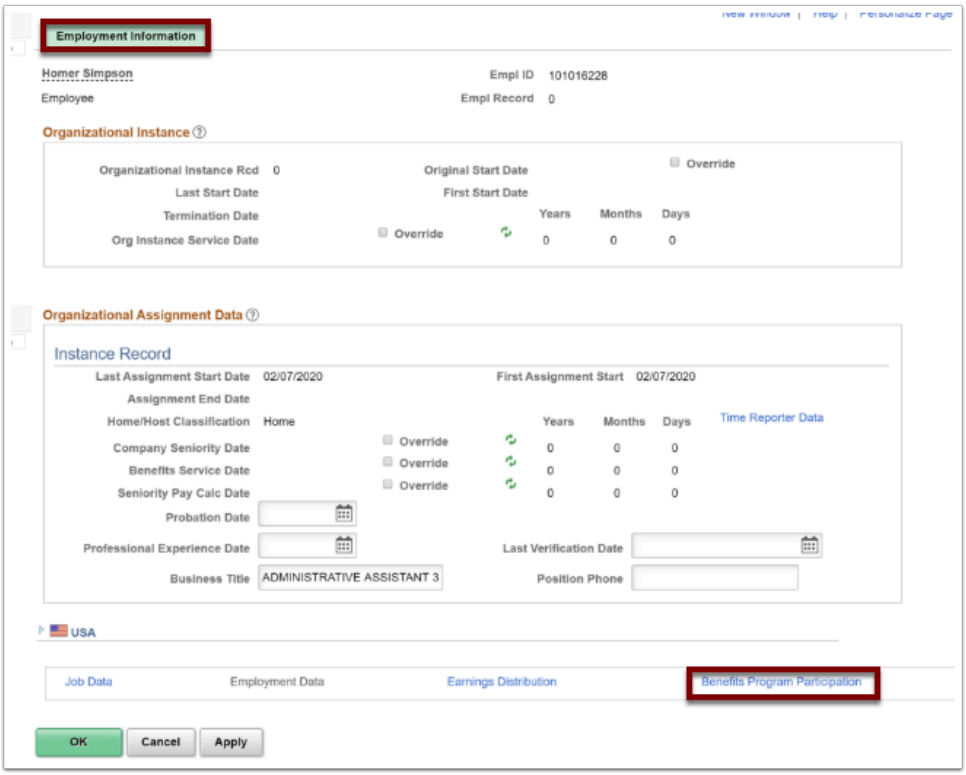
24. Select the **CTC Job Data** tab.
25. The CTC Job Data page displays.
26. **Leave Accrual Date** defaults to today's date. Change if necessary.
27. Enter valid values for pertinent information in the **Job Information** section.
28. Select the **CTC Earnings Distribution** tab.



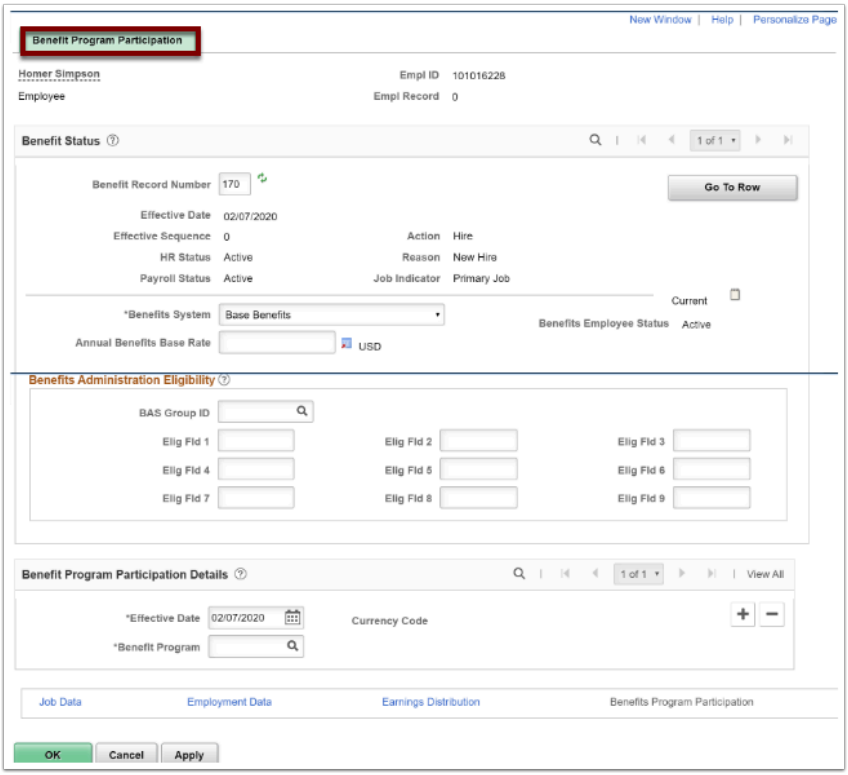
29. The CTC Earnings Distribution page displays.
30. Enter the appropriate **Earnings Code**.
31. Select the **Edit Chartfields** link to select a **Combination Code**.
32. Enter the **Percent of Distribution** assigned to the selected Combination Code.
    - **Warning:** If you are assigning multiple Earnings Codes and/or Combination Codes, the system will require you to indicate which is the primary record.
33. Select the **Employment Data** link at the bottom of the screen.



34. The Employment Information page displays.
35. Verify the defaulted values.
36. Select the **Benefits Program Participation** link at the bottom of the screen.



37. The Benefits Program Participation page displays.
38. Select the desired benefit program.
39. Select **OK**.



40. You have successfully Added a Job Instance.

Assigning Work Schedules

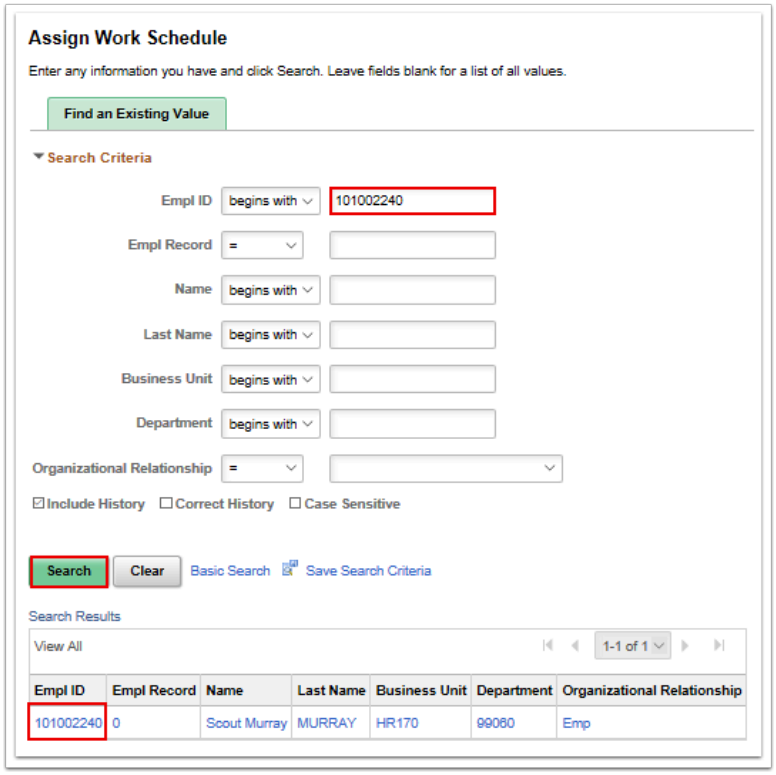
You must have at least one of these local college managed security roles:

- ZC Admin Enroll Time Reporters
- ZD TL Admin View Enrollment
- ZZ HCM Manager

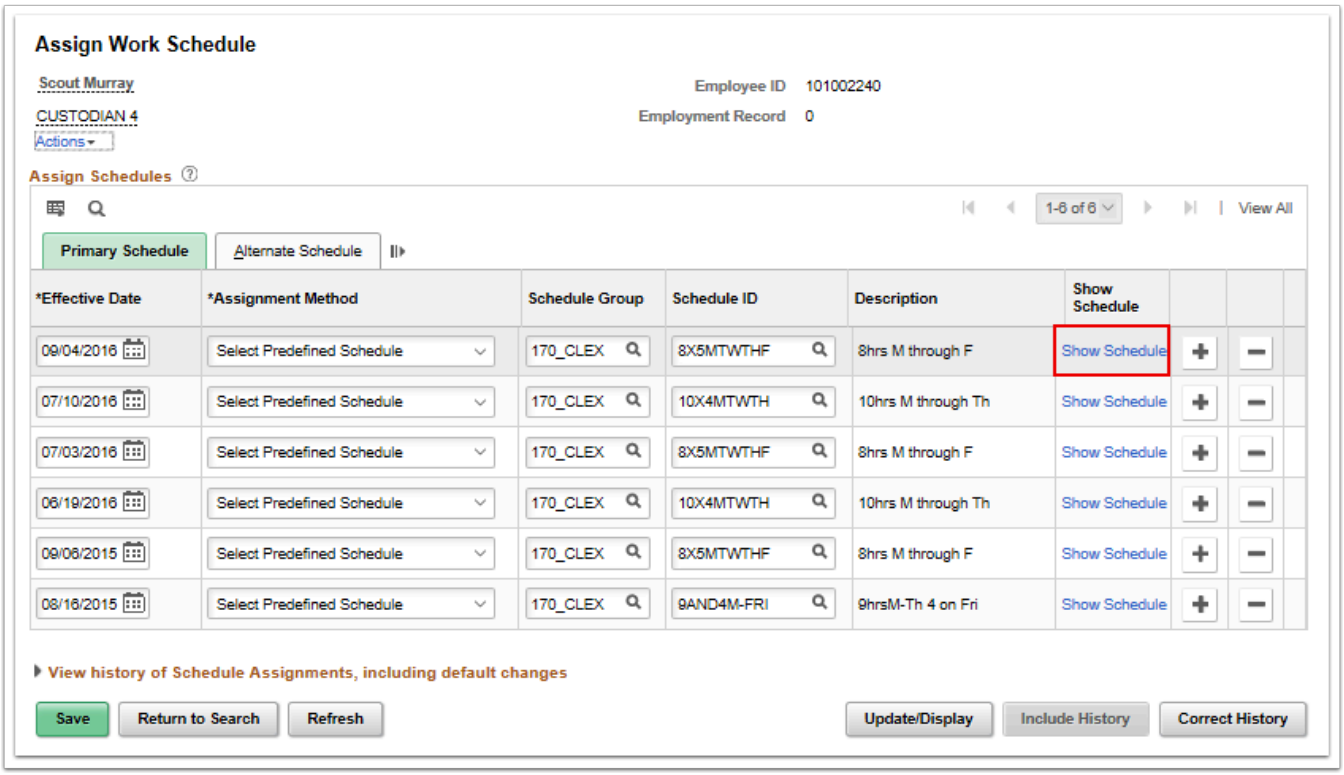
If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Time and Labor > Enroll Time Reporters > Assign Work Schedule

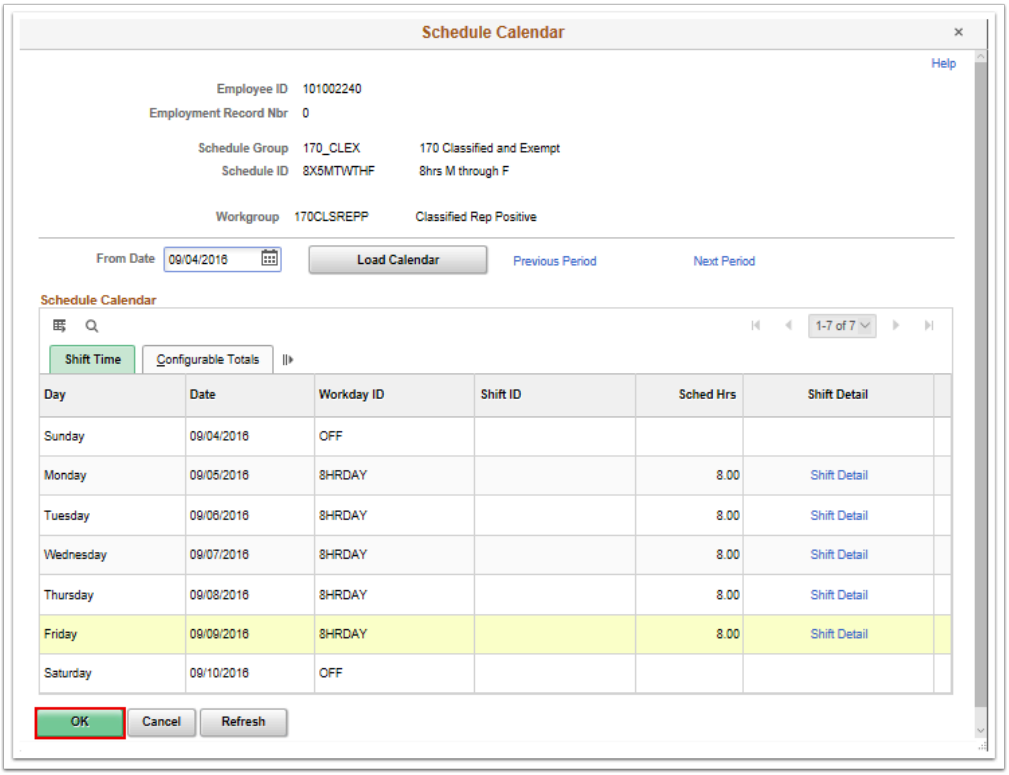
1. The Assign Work Schedule search page displays.
2. Enter the **Empl ID**.
3. Select the **Search** button.
4. The Search Results display.
5. Select the **Empl ID** link from the Search Results.



6. The Assign Work Schedule page displays.
7. Select the **Show Schedule** ink to view current schedule for the employee.

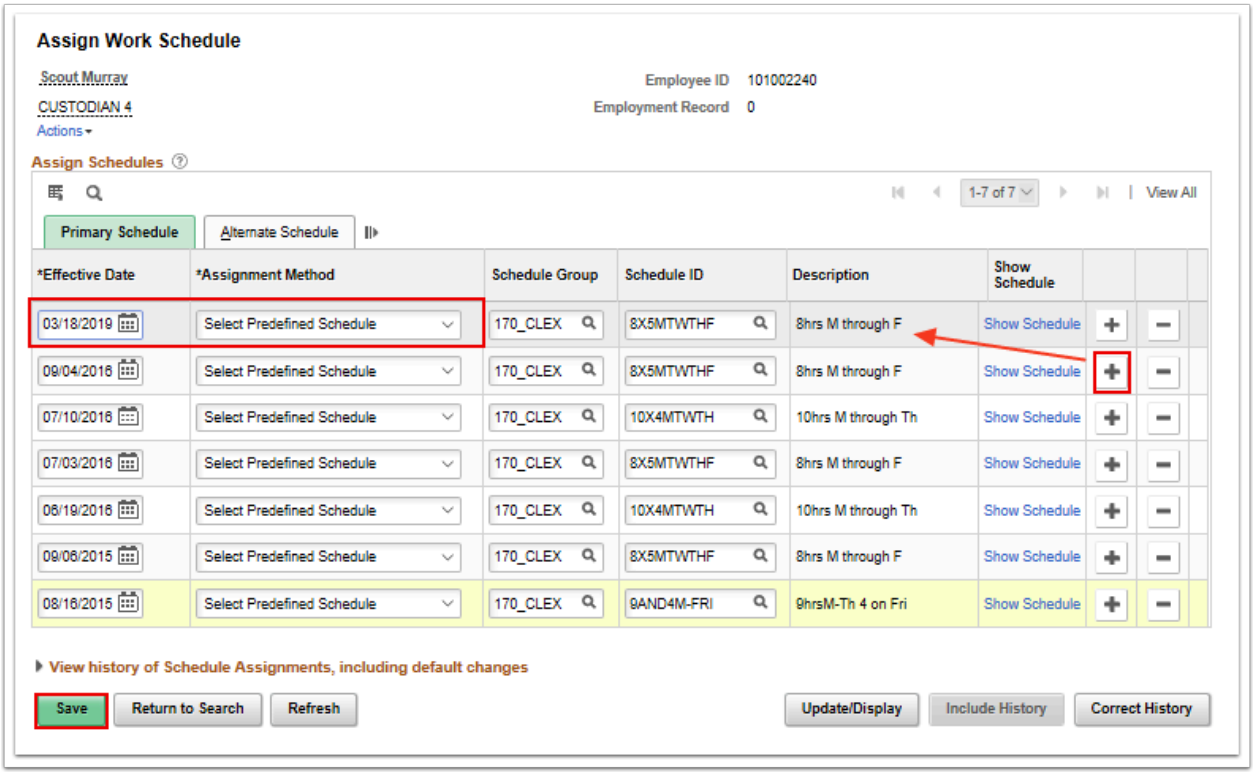


8. The **Schedule Calendar** pagelet displays.
9. View the employee's schedule.
10. Select the **OK** button when finished.



11. The Assign Work Schedule page displays.
12. To change the schedule, select the **Add a Row (+)** button to add an additional row.

13. Enter the **Effective Date**. **NOTE: Effective dates should be the FIRST WORK DAY of the week.**
14. Select the **Assignment Method**.



15. The process to review and assign a work schedule is now complete.
16. You have successfully Assigned a Work Schedule.
17. End of procedure to Hire a New Employee.