

9.2 Add a New Employee and Job Instance for a Volunteer (for volunteers that submit time for Volunteer L&I)

Purpose: Use this document to add a new employee and job instance for a volunteer that will submit time for Volunteer L&I ER in ctcLink.

Audience: Workforce Administrators/HR Staff.

 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

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

Add a New Employee and Job Instance for a Volunteer

Add a Person

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.
3. Select the **Add Person** button.

Add a Person

Person ID

Add Person

[Search for Matching Persons](#)

Biographical Details

4. The Add a Person page displays.
5. The **Effective Date** will default to Today's Date, change if applicable. (This is the date the person will now exist in ctcLink, there is no Job data or Institute assigned to the person here).
6. Select the **Format Type** drop-down menu and select **English**.
7. Select the **Add Name** button.

Add a Person **Modify a Person**

Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Person ID **NEW**

Name | | | 1 of 1 |

*Effective Date

*Format Type

Display Name

8. The Name pagelet displays.
9. Enter the **First Name**.
10. Enter the **Last Name**.
11. Select the **Refresh Name** button.
12. Select the **OK** button.

Person ID - NEW

Name

Help

English Name Format

Name Prefix: Dr

*First Name: James

Middle Name: I

*Last Name: Sweetness

Name Suffix:


Display Name: James Sweetness

Formal Name: Dr James Sweetness

Name: Sweetness, James I

OK Cancel Refresh Name

13. The Biographical Details tab displays.
14. From the Biographic Information section, select the **Date of Birth** field, and enter the appropriate information.

 **Because these volunteer hours will be processed through Time & Labor/Payroll, users will require system access to enter time worked.**

Please complete biographical detail and contact information tabs of Add/Modify Person screen as you would for any other regular employee. This includes adding social security number, birth date (to avoid creation of duplicate employee ID's in the system), business/college email address.

Biographic Information

Date of Birth: 07/04/1991

Birth Country: USA

Birth State:

Birth Location:

Years: 28 Months: 0

United States

☐ Waive Data Protection

15. From the **National ID** section, enter the social security number into the **National ID** field.

The screenshot shows a form section titled "National ID". It contains a table with the following columns: *Country, *National ID Type, National ID, Primary ID, and two empty columns. The *Country field is set to "USA". The *National ID Type field is set to "Social Security Number". The National ID field is highlighted with a red box and contains the text "XXX-XX-XXXX". The Primary ID field is empty. There are also buttons for adding and removing items.

The screenshot shows a form with several tabs: "Biographical Details", "Contact Information", "Regional", and "Organizational Relationships". The "Biographical Details" tab is highlighted with a red box. The form contains the following fields: Name, *Effective Date (07/30/2020), *Format Type (English), Display Name, Add Name button, Date of Birth, Birth Country (USA), Birth State, Birth Location, Waive Data Protection checkbox, Biographical History, *Effective Date (07/30/2020), *Sex (Unknown), Legal Definition of Sex, *Highest Education Level (Not Indicated), *Marital Status (Unknown), As of, Language Code, Alternate ID, Full-Time Student checkbox, and National ID section with *Country (USA), *National ID Type (Social Security Number), National ID field, Primary ID field, and buttons for Save, Notify, Refresh, Add, Update/Display, Include History, and Correct History.

Contact Information

16. Select the **Contact Information** tab.
17. The Contact Information page displays.
18. Select the **Add Address Detail** link.

Biographical Details **Contact Information** Regional Organizational Relationships

James Sweetness Empl ID NEW

Current Addresses

1-1 of 1 View All

Address Type	As Of Date	Status	Address			
Home	07/30/2019	A		Add Address Detail	+	-

19. The **Address History** page displays.
20. Select the **Add Address** link.

Address History

Address Type Home

Address History 1 of 1

*Effective Date 07/30/2019

Country USA

*Status A

[Add Address](#)

OK Cancel Refresh

21. The Edit Address pagelet displays.
22. Enter the **Street Address** on **Address Line 1** (if there is a P.O. Box you can enter it on Address Line 2).
23. Enter the **City**.
24. Select a **State** from the lookup icon.
25. Enter the **Postal** (Zip) Code.
26. Enter the **County** (optional).
27. Select the **OK** button.
28. The Address History page displays.
29. This time the address you entered will display on the page.

30. Select the **OK** button.

Address History

Address Type Home

Address History

*Effective Date 07/30/2019

Country USA

*Status A

Add Address

Address 1956 Ambassador Way - Spokane, WA 99224-4012 Spokane

OK Cancel Refresh

31. The Contact Information tab displays.

32. In the **Phone Information** enter the details regarding the phone contact.

- Select the **Phone Type** from the drop-down menu.
- Enter the **Telephone** Number.
- Enter an **Extension** (Optional).
- Select the **Preferred** check box.

Phone Information

*Phone Type	Telephone	Extension	Preferred		
Mobile	777/321-6987		<input checked="" type="checkbox"/>	+	-

33. In the **Email Addresses** section, enter the details regarding the email account.

- Select the **Email Type** from the drop-down menu.
- Enter the **Email Address**.
- Select the **Preferred** check box.

Biographical Details **Contact Information** Regional Organizational Relationships

James Sweetiepi Empl ID NEW

Current Addresses

Address Type	As Of Date	Status	Address			
Home	07/30/2019	A	1956 Ambassador Way Spokane, WA 99224-4012 Spokane	Edit/View Address Detail	+	-

Phone Information

*Phone Type	Telephone	Extension	Preferred			
Mobile	777/321-6987		<input type="checkbox"/>	+	-	

Email Addresses

*Email Type	*Email Address	Preferred			
Home	sweetiepi@hotmail.com	<input type="checkbox"/>	+	-	

Instant Message IDs

*IM Protocol	*IM Domain	*Network ID	Preferred			
			<input type="checkbox"/>	+	-	

Save Notify Refresh Add Update/Display Include History Correct History

Regional

34. Select the **Regional** tab.
35. The Regional page displays.
36. Select an **Ethnic Group** from the lookup icon.
37. Select the **Primary** checkbox.
38. In the **Veterans** section: select a **Military Status** from the drop-down menu.
39. If you select a discharge related option, the system will require the **Military Discharge Date**.
40. The **Smoker History** section is optional. The fields do not feed into any other tables.

Biographical Details | **Regional** | Contact Information | Organizational Relationships

James Sweetness Person ID NEW

USA

Ethnic Group 1 of 1 View All

Regulatory Region USA United States

Ethnic Group **BLACK** Black/African American

☒ Primary

History 1 of 1 View All

Effective Date Date Entitled to Medicare

Citizenship (Proof 1) Citizenship (Proof 2)

☐ Eligible to Work in U.S.

Veteran

Military Status **Active Reserve**

Military Discharge Date Edit Discharge Date

Smoker History 1-1 of 1 View All

	*Smoker	*As of
1	No	

Organizational Relationships

41. Select the **Organizational Relationships** tab.
42. The Organizational Relationships page displays.
43. Select the **Employee** option. **Note:** For this particular process need, Employee is the option to select for Volunteers.
44. Select the **Select Checklist Code** list; select **HIRE**.
45. Select the **Add Relationship** button.

Biographical Details | Contact Information | Regional | **Organizational Relationships**

James Sweetness Person ID NEW

Choose Org Relationship to Add

☒ Employee
☐ Contingent Worker
☐ Person of Interest

Empl Record 0

Select Checklist Code Hire

Add Relationship

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

46. An External Search Match Results pagelet displays.
47. Listed are the **Integrated Search Results** to verify that the person being added does not already exist in the system.
48. Select the **Return** button.

External Search Match Results

Integrated Search Results

WARNING: Potential duplicates were found - this person may already exist in the database or in an external system.
Refer to the list below for possible matches to the person you are adding.
After you select the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

Match Criteria

Search Results Summary

Search Results

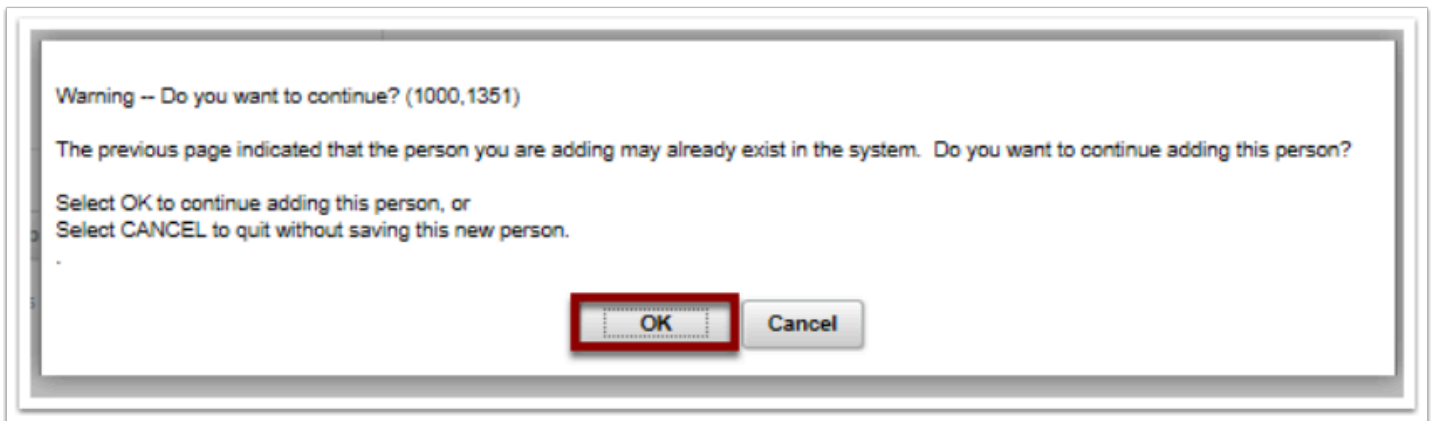
Personalize Find View All First 1-6 of 6 Last

Results	Results2	Additional Information	EMPLID	Name Type	Name Effective Date	First Name	Last Name	National ID
Import				PRJ		CanvasCourse	Test	XXXXXXXXXX
Import				PRJ		Canvas	Test	XXXXXXXXXX
Import				PRJ		Turra	Diesel	XXXXXXXXXX
Import				PRJ		Vin	Diesel	XXXXXXXXXX
Import				PRJ		Canvas Course	Test	XXXXXXXXXX
Import				PRJ		Cybil	Carter	XXXXXXXXXX

Return

49. A warning message displays asking if you are sure you want to continue.

50. Select the **OK** button.



51. The Job Data page displays for use in the next section: **Adding a Job Instance**.

52. On the **Work Location tab** enter **Company, Department, Location**.

A screenshot of a software interface for adding a new employee and job instance. The 'Work Location' tab is selected and highlighted with a red box. The interface shows a form for 'James Sweetness' (Empl ID 101034534). The 'Work Location Details' section contains various fields: 'Effective Date' (04/02/2021), 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), 'Action' (Hire), 'Reason' (dropdown), 'Job Indicator' (Primary Job), 'Position Number' (searchable), 'Position Entry Date' (04/02/2021), 'Regulatory Region' (USA), 'Company' (searchable, highlighted with a red box), 'Business Unit' (HR890), 'Department' (searchable, highlighted with a red box), 'Location' (searchable, highlighted with a red box), 'Establishment ID' (searchable), 'Last Start Date' (04/02/2021), and 'Expected Job End Date' (04/02/2021). At the bottom, there are buttons for 'OK', 'Cancel', and 'Apply'. The 'Work Location' tab is also highlighted with a red box.

53. Select the **Job Information** tab.

54. The Job Information page displays.

55. Select the **Job Code** (Description Volunteer).

56. Select the **Empl Class** drop-down menu and select the appropriate classification (**Volunteer**).

Regular/Temporary:

Work Location **Job Information** Job Labor Payroll Salary Plan Compensation CTC Job Data CTC Earnings Distribution

James Sweetness
Employee

Empl ID 101034534
Empl Record 0

Job Information Details 1 of 1

Effective Date 04/02/2021
Effective Sequence 0
HR Status Active
Payroll Status Active

Action Hire
Reason
Job Indicator Primary Job

Go To Row

Current

*Job Code
Entry Date
Supervisor Level
Supervisor ID
Reports To
*Regular/Temporary Regular
*Empl Class
*Regular Shift Not Applicable

*Full/Part Full-Time
*Officer Code None
Shift Rate
Shift Factor

Standard Hours 40.00
FTE 0.000000

Work Period W Weekly

Contract Number
Contract Type

Next Contract Number

USA

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply Refresh

Payroll

57. Select the Payroll tab.
58. Payroll tab within job data screen must show volunteers enrolled in **"Payroll for North America"** and **Absence System "Other"** as shown in the following example.
59. **College Volunteer Pay** group **"Vxx"**
60. **Tax Location code: WAST00**

Work Location Job Information Job Labor **Payroll** Salary Plan Compensation CTC Job Data CTC Earnings Distribution

James Sweetness Employee Empl ID 101034534 Empl Record 0

Payroll Information 1 of 1

Effective Date 04/02/2021 Effective Sequence 0 HR Status Active Payroll Status Active Action Hire Reason Job Indicator Primary Job Current

*Payroll System Payroll for North America Absence System Other

Payroll for North America

Pay Group Employee Type Tax Location Code GL Pay Type Combination Code Holiday Schedule *Tipped FICA Status Subject Edit ChartFields

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply Refresh

Work Location Job Information Job Labor Payroll Salary Plan Compensation CTC Job Data CTC Earnings Distribution

Note: FirstLink Colleges with already active volunteers in ctcLink will need to terminate current volunteer records and rehire them by adding additional job instance. This step is crucial, as volunteers must show Payroll for North America as the payroll system under Payroll Tab in Job Data. (Making edits to this screen through correct history does not allow users to override this field.)

Salary Plan (if applicable)

61. **If applicable (optional):** Select the **Salary Plan** tab (this is a setup value and a college will need this setup to use it in these screens).
62. The Salary Plan page displays.
63. The **Salary Admin Plan** defaults to **PE**.
64. The **(Salary) Grade** defaults to **V**.

CTC Earnings Distribution

65. Select the **CTC Earnings Distribution** tab.
66. **Earnings code: VOL.**
67. Chartfield configuration assigned to this pay group must reflect **account code** of **5010050** (Labor and Industries) as shown in example below:

Benefit Program Participation

68. **Select the Benefits Program Participation** page.
69. **Benefit Record Number** on this screen must display **Company Number**.
70. Volunteers must be enrolled in Base Benefits with **SB0** benefit program on Benefits Participation Screen as shown below.

Benefit Program Participation

Employee: _____ Empl ID: _____ Empl Record: 0

Benefit Status

Benefit Record Number: **890** Go To Row

Effective Date: 01/06/2020

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Hire

Reason: _____

Job Indicator: Primary Job

*Benefits System: **Base Benefits** Current

Annual Benefits Base Rate: _____ USD

Benefits Employee Status: Active

Benefits Administration Eligibility

BAS Group ID: _____

Elig Fld 1: _____ Elig Fld 2: _____ Elig Fld 3: _____

Elig Fld 4: _____ Elig Fld 5: _____ Elig Fld 6: _____

Elig Fld 7: _____ Elig Fld 8: _____ Elig Fld 9: _____

Benefit Program Participation Details

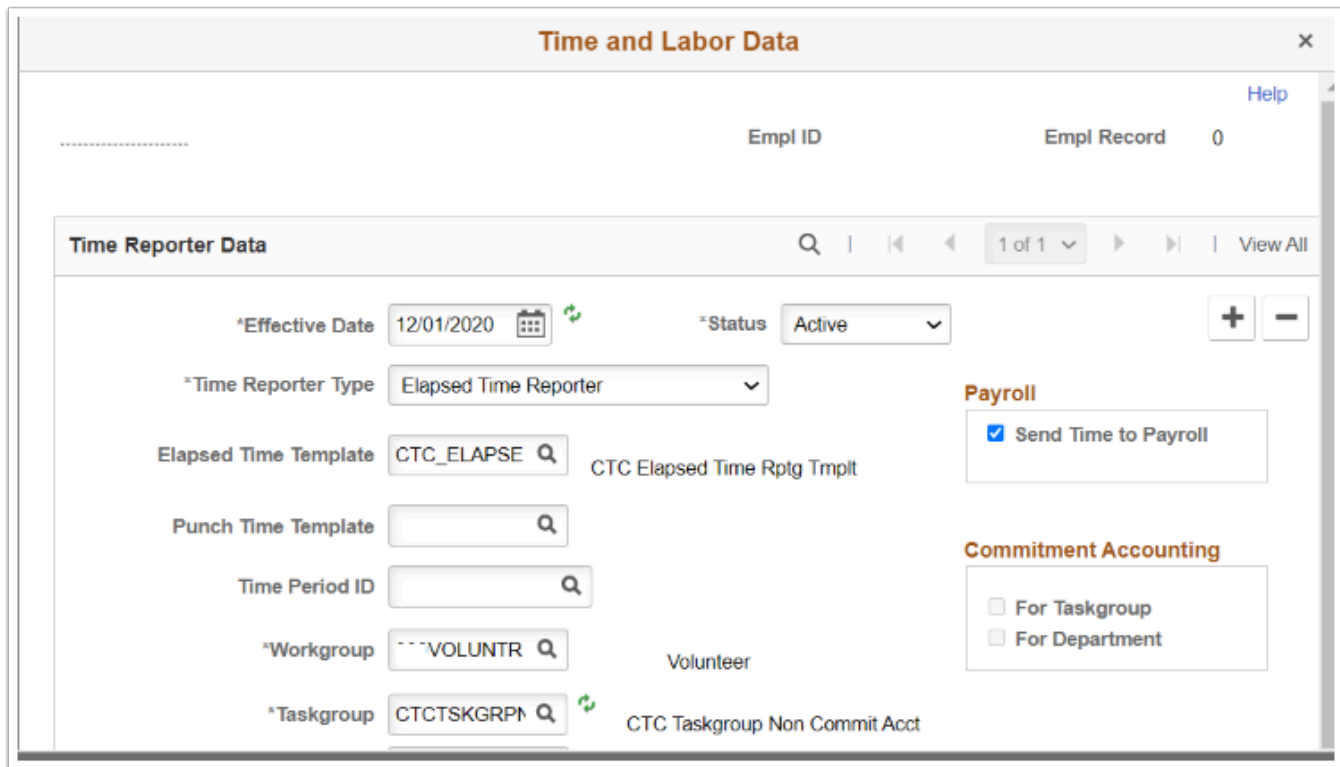
*Effective Date: 01/06/2020 Currency Code: USD

*Benefit Program: **890** 403b/457 retire/tax offer cont

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Employment Data/Time Reporter

71. Select the **Employment Data** link and then select the **Time Reporter data** link.
72. The Time and Labor Data pagelet displays.
73. Elapsed Time Template: **CTC_ELAPSE**.
74. Workgroup: **College specific Volunteer group**.
75. Task group: **CTCTSKGRPN**.



Time and Labor Data

Empl ID: Empl Record: 0

Time Reporter Data

*Effective Date: 12/01/2020 *Status: Active

*Time Reporter Type: Elapsed Time Reporter

Elapsed Time Template: CTC_ELAPSE CTC Elapsed Time Rptg Tmplt

Punch Time Template:

Time Period ID:

*Workgroup: VOLUNTR Volunteer

*Taskgroup: CTCTSKGRPM CTC Taskgroup Non Commit Acct

Payroll

☒ Send Time to Payroll

Commitment Accounting

☐ For Taskgroup

☐ For Department

76. Select **OK**.
77. Select **Apply**.
78. **Compensation Rate** is **zero** as it is a volunteer.
79. Select **OK**.
80. **Record is created**.

Entering General Deduction for Volunteer L&I ER

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

- ZC Payroll Data Maintenance
- ZZ SS Payroll
- ZZ Payroll Data Maintenance
- ZZ Payroll Processing

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 > Payroll for North America, Employee Pay data USA > Deductions, Create General Deductions

1. The Deductions, Create General Deductions search page displays.
2. Enter **Search Criteria**.

3. Select the **Search** button.
4. The Deductions, Create General Deductions page displays.
5. For MedAid deduction processing, **Deduction Code 000201** must be added to employee's pay data(Volunteer L&I ER).
6. Process complete.