

## 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

NEW

Add Person

[Search for Matching Persons](#)

## Biographical Details

- The Add a Person page displays.
- 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).
- Select the **Format Type** drop-down menu and select **English**.
- Select the **Add Name** button.

The screenshot shows the 'Add a Person' page with the 'Biographical Details' tab selected. The 'Name' pagelet is displayed, showing the following fields and controls:

- Person ID:** NEW
- \*Effective Date:** 07/30/2019 (with a calendar icon)
- \*Format Type:** English (with a dropdown arrow)
- Display Name:** (empty field)
- Buttons:** +, -, and Add Name (highlighted)

- The Name pagelet displays.
- Enter the **First Name**.
- Enter the **Last Name**.
- Select the **Refresh Name** button.
- Select the **OK** button.

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.**

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

The screenshot shows a table with the following columns: \*Country, \*National ID Type, National ID, Primary ID, and two empty columns. The \*Country field contains 'USA'. The \*National ID Type field is a dropdown menu with 'Social Security Number' selected. The National ID field contains 'XXX-XX-XXXX' and is highlighted with a red border. The Primary ID field has a checkbox and '+' and '-' buttons. The table has a search bar and navigation controls at the top.

The screenshot shows the 'Biographical Details' tab selected. The 'Biographical Information' section includes fields for Date of Birth, Birth Country (USA), Birth State, and Birth Location. The 'Biographical History' section includes fields for Effective Date, Sex, Highest Education Level, Marital Status, and Language Code. The 'National ID' section at the bottom is a table with columns for \*Country, \*National ID Type, National ID, and Primary ID. The \*Country field contains 'USA' and the \*National ID Type field is a dropdown menu with 'Social Security Number' selected. The National ID field is empty. The Primary ID field has a checkbox and '+' and '-' buttons. The table has a search bar and navigation controls at the top.

## 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**

Address Type	As Of Date	Status	Address			
Home	07/30/2019	A		<a href="#">Add Address Detail</a>	+	-

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 1 of 1

\*Effective Date 07/30/2019

Country USA

\*Status A

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

Add Address

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**

1-1 of 1 View All

*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 Sweetness 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	<a href="#">Edit/View Address Detail</a>	+ -

**Phone Information**

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

**Email Addresses**

*Email Type	*Email Address	Preferred		
Home	sweetiepie@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.

The screenshot displays a user profile for James Sweetness (Person ID: NEW) with the 'Regional' tab selected. The 'Ethnic Group' section includes a search bar and a list of results: 'Regulatory Region: USA United States' and 'Ethnic Group: BLACK Black/African American'. The 'BLACK' entry is highlighted, and a 'Primary' checkbox is checked. Below this, the 'History' section contains fields for 'Effective Date', 'Date Entitled to Medicare', 'Citizenship (Proof 1)', and 'Citizenship (Proof 2)', along with an 'Eligible to Work in U.S.' checkbox. The 'Veteran' section features a 'Military Status' dropdown menu set to 'Active Reserve' and 'Military Discharge Date' and 'Edit Discharge Date' fields. At the bottom, the 'Smoker History' section shows a table with one row: '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

Select Checklist Code

[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** x

[Help](#)

**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](#)

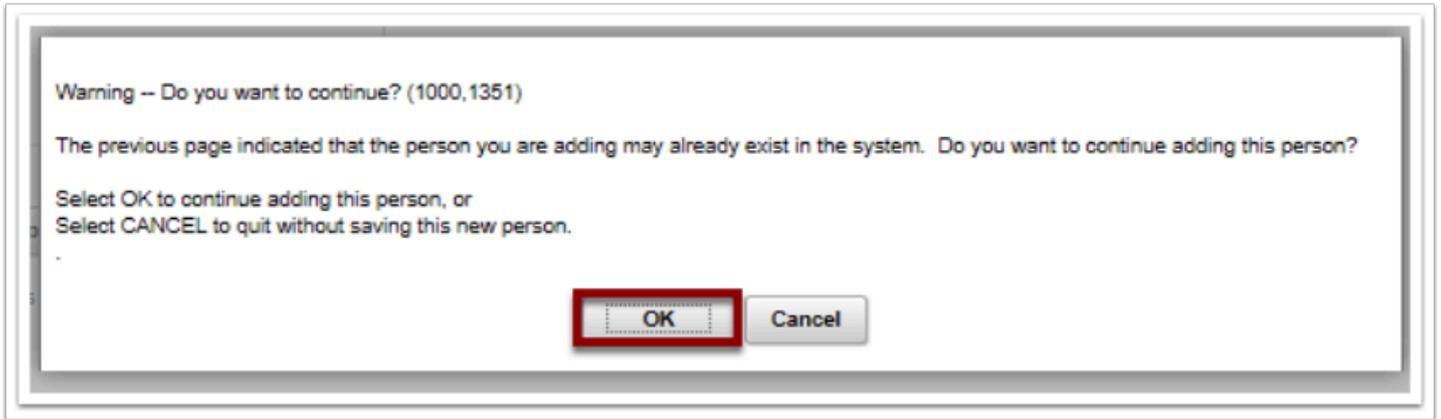
[Search Results Summary](#)

**Search Results** Personalize | Find | View All |  | First | Last

Results	Results2	Additional Information	EMPLID	Name Type	Name Effective Date	First Name	Last Name	National ID
<input type="button" value="Import"/>				PRI		CanvasCourse	Test	XXXXXXXXXX
<input type="button" value="Import"/>				PRI		Canvas	Test	XXXXXXXXXX
<input type="button" value="Import"/>				PRI		Turra	Diesel	XXXXXXXXXX
<input type="button" value="Import"/>				PRI		Vin	Diesel	XXXXXXXXXX
<input type="button" value="Import"/>				PRI		Canvas Course	Test	XXXXXXXXXX
<input type="button" value="Import"/>				PRI		Cybil	Carter	XXXXXXXXXX

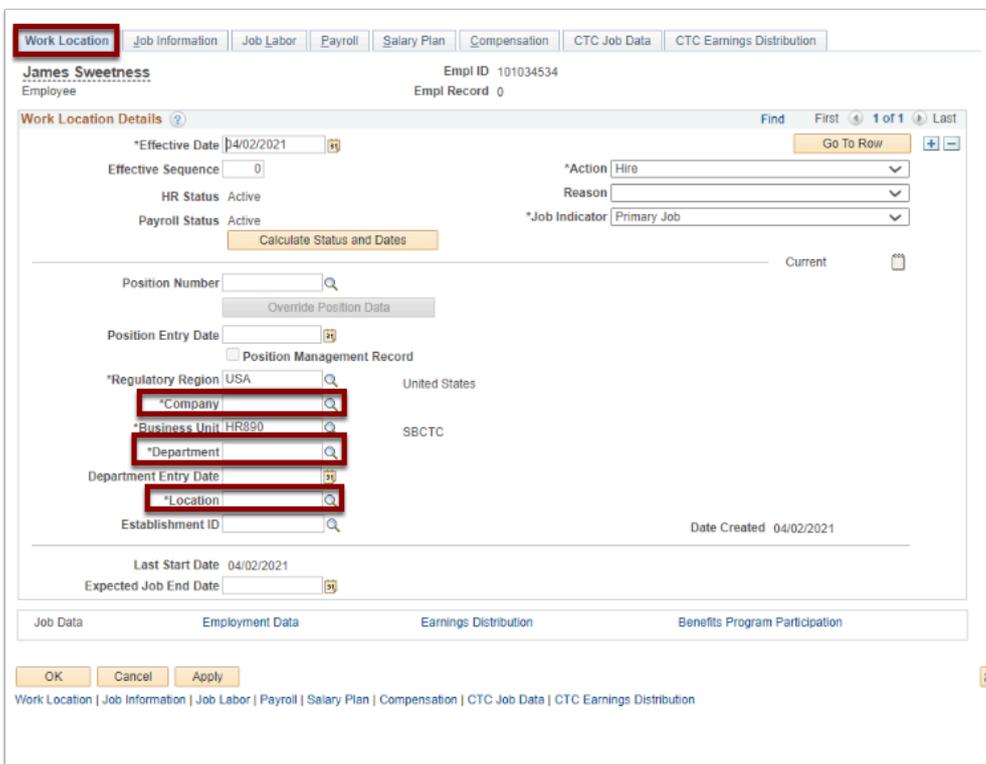
49. A warning message displays asking if you are sure you want to continue.

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**.



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 Go To Row

Effective Sequence 0 Action Hire Reason

HR Status Active Job Indicator Primary Job

Payroll Status Active Current

\*Job Code

Entry Date

Supervisor Level

Supervisor ID

Reports To

\*Regular/Temporary Regular

\*FullPart Full-Time

Empl Class

\*Officer Code None

Regular Shift Not Applicable

Shift Rate

Shift Factor

Standard Hours 40.00 Work Period W Weekly

FTE 0.000000

Contract Number   Next Contract Number

Contract Type

USA

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply Refresh

## Payroll

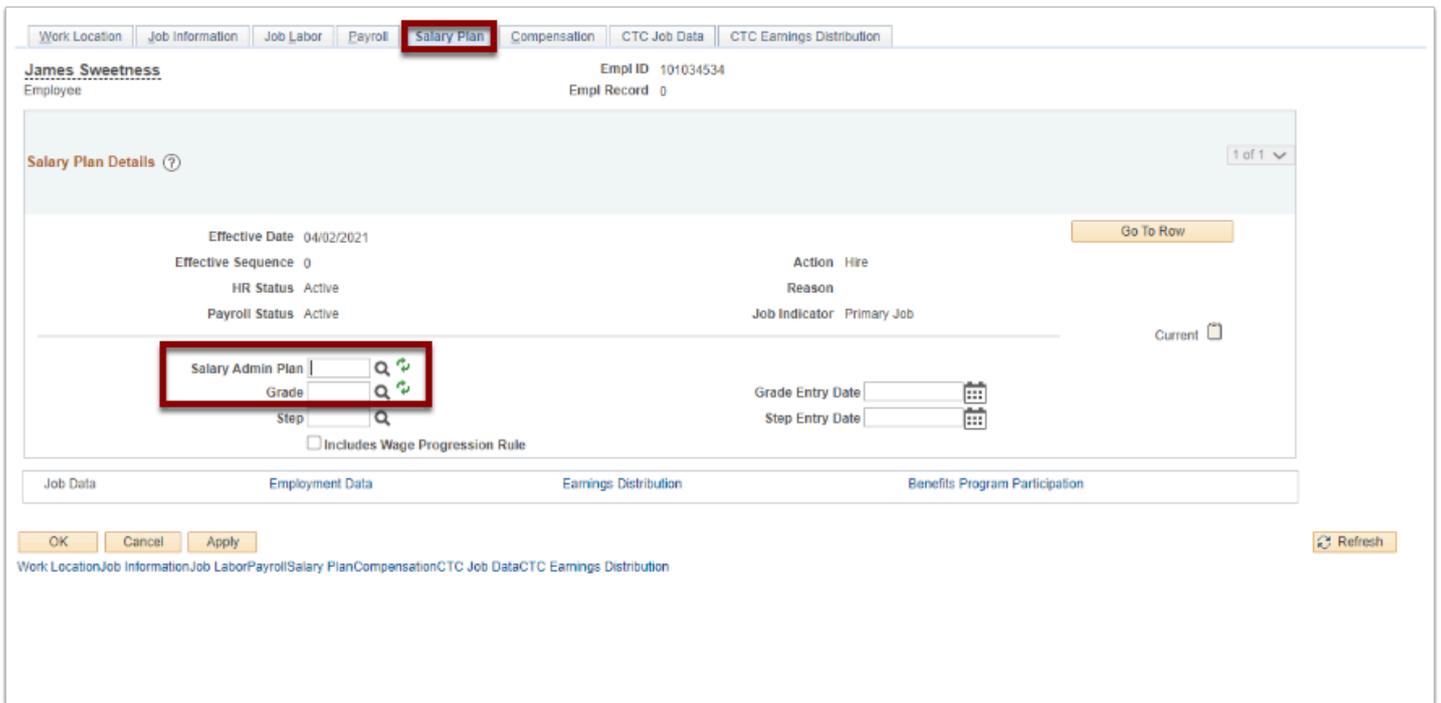
57. Select the Payroll tab.
58. Payroll tab within job data screen must show volunteers enrolled in **“Payroll for North America”** and **Absence System “Other”** as shown in the following example.
59. **College Volunteer Pay** group **“Vxx”**
60. **Tax Location code: WAST00**

The screenshot shows the 'Payroll' tab for an employee named James Sweetness. The 'Payroll System' dropdown menu is highlighted with a red box and is set to 'Payroll for North America'. Other visible fields include 'Effective Date' (04/02/2021), 'HR Status' (Active), and 'Payroll Status' (Active). Below the main form, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons, along with a 'Refresh' button.

**!** **Note:** FirstLink Colleges with already active volunteers in ctLink 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.)

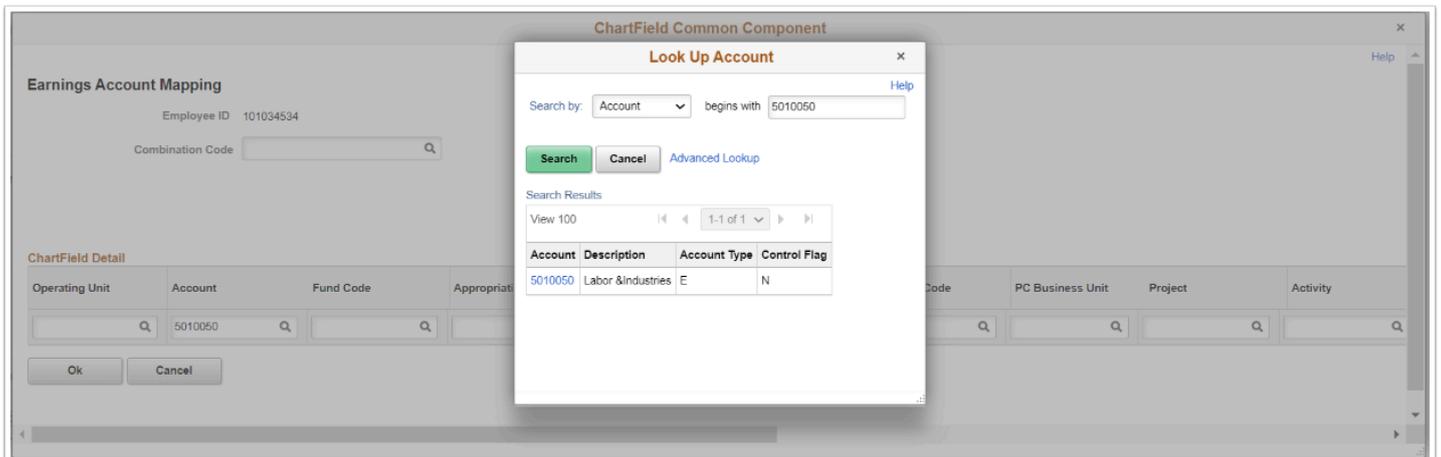
## Salary Plan (if applicable)

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.

The screenshot displays the 'Benefit Program Participation' interface. At the top, there's a header with 'Benefit Program Participation' in a red box. Below it, the 'Employee' section shows 'Empl ID' and 'Empl Record 0'. The 'Benefit Status' section includes a search bar, 'Benefit Record Number' (S90), 'Effective Date' (01/00/2020), 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), 'Action Hire', 'Reason', 'Job Indicator', 'Primary Job', 'Current' status, and 'Benefits System' (Base Benefits). The 'Annual Benefits Base Rate' is set to USD. The 'Benefits Administration Eligibility' section contains a 'BAS Group ID' search field and nine 'Elig Fld' (1-9) input fields. The 'Benefit Program Participation Details' section shows 'Effective Date' (01/00/2020), 'Currency Code' (USD), and 'Benefit Program' (S90). At the bottom, a navigation bar includes links for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation' (highlighted in a yellow box).

## 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**.

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.