9.2 Add a New Employee Person Record and Job Instance

Purpose: Use this document as a reference for how to add a person/employee and a job instance in ctcLink.

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 QRG titled: Performing a Search Match

Add a New Employee Person Record and Job Instance

Adding a New Employee

> ⚠️ **NOTE: As part of the hiring process, all employees need to be enrolled in a pre-defined Work Schedule. Review the following QRG for steps:**
>
> • 9.2 Assigning Work Schedules (classic pages)
> • 9.2 MSS - Assign Work Schedule (Fluid) (using Fluid tiles)
> • 9.2 Assigning Work Schedule by Workgroup

Navigation: Menu > Workforce Administration > Personal Information > Add a Person

1. The **Add a Person** search 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.
   - If the person does have an existing Empl ID, found in the Search Match Results follow steps for **Adding a New Employee Instance.**

3. Select the **Add Person** button.
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 or Institute assigned to the person here).
6. Select the **Format Type** drop-down menu and select **English.**
7. Select the **Add Name** button.
8. The **Name** pagelet displays.
9. Enter the appropriate information into the **First Name** field.
10. Enter the appropriate information into the **Last Name** field.
11. Select the **Refresh Name** button, then select **OK**.
12. The **Biographical Details** page displays.
13. Select the **Date of Birth** field and enter the appropriate information.
14. ***NOTE: Leave the Birth State and Birth Location fields blank. Birth Country auto-populates to USA.**
15. In the **Biographical History** section, **Gender and Orientation Details** subsection, change the default value of the **Legal Sex** field from the default *Unknown* to the employee's Legal Sex.

Biographical History

Q | |◁ ◁ 1 of 1 ∨ ▷ ▷| | View All

*Effective Date 03/09/2023 📅 + −

Legal Definition of Sex ⑦

Gender and Orientation Details

Regulatory Region USA United States

*Legal Sex Unknown ∨

Help - Legal Definition of Sex ✕

Legal Definition of Sex

Please enter the legal sex as denoted on this person's birth certificate or driver's license per WAC 246-490-075 or WAC 308-104-0150.

*Highest Education Level Not Indicated ∨

*Marital Status Unknown ∨ As of 📅

Language Code ∨

Alternate ID

☐ Full-Time Student

Example when No SOGI role is assigned. Only **Legal Sex** field is displayed

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ℹ **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.

Gender and Orientation Details

Regulatory Region USA United States

*Legal Sex Male ∨

Pronoun 🔍 ℹ

Sexual Orientation 🔍 ℹ

Gender Identity 🔍 ℹ

Pronoun and **SOGI** fields are displayed and can be added and updated

16. Select the **National ID** field, and enter the social security number into the blank field.
17. Select the **Contact Information** tab at the top.
17. The **Contact Information** page displays.
18. Select the **Add Address Detail** link.
19. The **Address History** pagelet displays.
20. Select the **Add Address** link.

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 **OK**.

> ⚠️ **Warning:** If the system does not recognize the address it will list potential alternatives. Select the **Override Address Verification** box to bypass.

28. The system will direct you back to the **Address History** page. This time the address you entered will display on the page.
29. Select **OK.**
30. The system will redirect you to the **Contact Information** tab.
31. 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.
32. In the **Email Address** 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.

> ❗ **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 Olympia ERP staff will update the **User Profile.** If they do have access, they can 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.

33. Select the **Regional** tab.
34. The Regional page displays.
35. Select an **Ethnic Group** from the lookup icon.
36. Select the **Primary** checkbox.

💡 **Tip:** Use the fields in the History section to track your I-9 information.

37. In the **Veterans** section:
    - Select a **Military Status** from the drop-down menu.
    - If you select a discharge related option, the system will require the **Military Discharge Date**.
38. Select the **Organizational Relationships** tab.

💡 **NOTE:** the Smoker History section is optional. The fields do not feed into any other tables.

39. The Organizational Relationships page displays.
40. Select the **Employee** option.
41. Select the **Select Checklist Code** list; select **HIRE**.
42. Select **Add Relationship.**

43. The **Job Data** page will display.
44. You have successfully Added a New Employee to Biographical Details.

Adding a Job Instance

> ⓘ 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.**

> ⚠️ **IMPORTANT:** If employee information has been entered and saved before adding job data, you may search using the **Add Employment Instance Page.** Navigation: Main Menu → Workforce Administration → Personal Information → Organizational Relationships → New Employment Instance

Navigation: Menu > Workforce Administration > Job Information > Job Data

1. The Job Data search page displays.
2. On the **Find an Existing Value** tab, enter **EMPL ID**.
3. Select **Search**.
4. The Job Data page displays and defaults to the **Work Location** tab.
5. Select **New Hire** from the **Reason** drop-down menu.
6. Alternately, if this person is a **Re-hire** versus a first time hire, you should select this from the Action field drop-down menu.
7. Enter or select the desired position by selecting the **Position Number** lookup icon.
8. Select or enter the **Establishment ID.**

9. Select the **Job Information** tab.
10. The Job Information page displays.
11. Select the **Supervisor ID** lookup icon to select the supervisor for the new hire.
12. Select the **Empl Class** drop-down menu and select the appropriate classification for the new hire.
13. Select the **Job Labor** tab.
14. The Job Labor page displays.
15. Enter the **Union Code** on the **Job Labor** page, if applicable.

> 💡 **NOTE:** The Union Code will auto populate if it is included in the Position.

16. Select the **Payroll** tab.
17. The Payroll page displays.
18. The **Payroll System** field defaults to **Payroll for North America**.

> ❗ **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 pay data from pushing to Payroll.

19. Select the **Absence System** drop-down menu and select **Absence Management**.
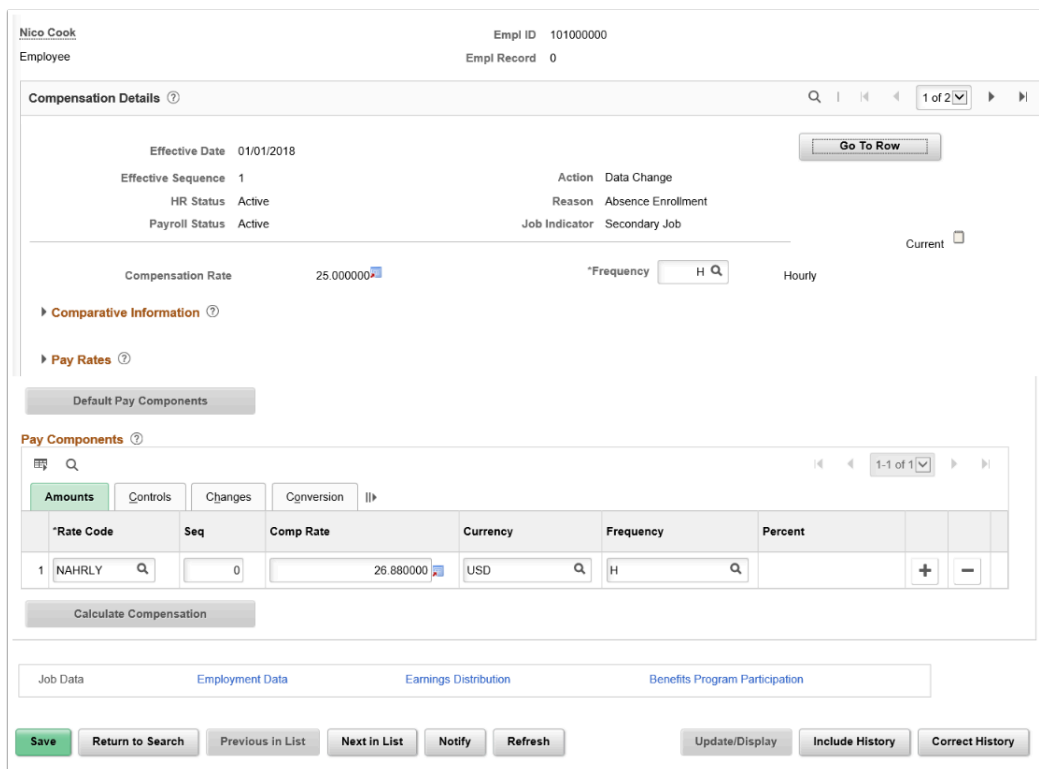
20. Select the **Pay Group** lookup icon and select the pay group for the position.
21. Select the **Salary Plan** tab.
22. The Salary Plan page displays.
23. Enter the **Salary Step**.

> 💡 **NOTE**: For those that are to receive automatic step pay increases, you must enter the **Salary Admin Plan, Grade and Step.**

24. Select the **Compensation** tab.
25. The Compensation page displays.
26. Use the **Compensation** page to specify the compensation rate for the employee.
27. Select the **Default Pay Components** button to execute rate code defaults. Rate code defaults specify previously defined values.

OR:

28. In the **Rate Code** field, select the **NAANNL** Comp Rate Code from the look up icon (Use the **HRLY Comp Rate Code** for Hourly Employees).
29. Enter the Comp Rate amount in the **Comp Rate** field.
30. Select the **Calculate Compensation** button to calculate the employee's compensation.

31. Select the **CTC Job Data** tab.
32. The CTC Job Data page displays.
33. Enter the **Leave Accrual Date**.
34. Enter **DRS Calendar**. (This is dependent on Employee Type. Refer to the DRS website for applicable calendar options).

a. Contract Begin Date and Contract End Date Fields will also be dependent upon this information. See QRG, **Using DRS Calendars** Import DRS Calendar Questions on Hire or Program Change.

35. Enter the **Faculty Status** (Optional).
36. Select the **CTC Earnings Distribution** tab.
37. Enter the appropriate **Earnings Code.**
38. Select the **Edit Chartfields** link, to select a Combination Code .
39. The Edit Chartfields pagelet displays.
40. Enter the **Percent of Distribution** assigned to the selected Combination Code.
41. Select **Save**.

> ⚠ Warning: If you are assigning multiple Earnings Codes and/or Combination Codes the system will require you indicate which is the primary record

42. Select the **Employment Data** link at the bottom of the page.
43. The Employment Information page displays.
44. Verify the defaulted values.
45. Select the **Time Reporter Data** link.
46. The Time and Labor Data pagelet displays.
47. Enter the **Effective Date.**
48. Select the **Time Reporter Type** (Elapsed or Punch).
49. Enter the **Elapsed OR Punch Time Template** (should coincide with the Time Reporter Type you selected).
50. Select the appropriate **Workgroup** from the menu options.
51. Select the appropriate **Taskgroup** from the menu options.
52. Select **OK.**

> ⓘ **BE ADVISED**: The data included in the **Organizational Instance** and **Organizational Assignment** Data sections of the Employment Information page, will auto-populate once the entire Job Data record is saved.

> 💡 **NOTE:** If you have the security access to add a Benefit Program, you will see the **Benefits Program Participation** link at the bottom of the Job Data page. The Benefits Program should be set up during the Add a New Employee and Job Instance process. I**f you don't have security access for this action, the Benefits Specialist should be notified to take this action.** Your college should determine a repeatable business process to ensure that this part of the new employee setup is not missed.

53. You will be re-directed to the **Organizational Assignment Data Page**.
54. Select the **Benefits Program Participation** link towards the bottom of the screen.
55. Enter your college code in the **Benefit Record Number** field.
56. Select the **Benefit Program** lookup icon.
57. Select the desired benefit program.
58. Select the **Save** button.

> 💡 **NOTE:** To enroll new employees in benefits such as Saving and Spending Account Plans, Supplemental Life and AD&D, see the individual QRGs that specifically address these processes.

> ⓘ NOTE: As part of our updated system design post DG4 Go-Live, it is important to add a Work Schedule for exceptional time reporters, otherwise payable time will not be generated for them. Follow the steps from the QRG 9.2 Assigning Work Schedules.

59. Select the **Job Data** link to return to the **Job Data** page.
60. You have successfully Added a Job Instance!

Set Up Employee for DRS Reporting

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

Navigation: Menu > Benefits > CTC Customs > Retirement Fields

1. The Retirement Fields search page displays.
2. Enter **Empl ID**.
3. Select the **Search** button.
4. The Retirement Fields page displays.
5. Enter **Effective Date**.
6. Enter the **DRS Option** (or select from drop-down menu).
7. Choose **DRS Option Date**.
8. Enter **Ret Deduction Indicator** (or select from drop-down menu).
9. **Choose Retirement Plan Effective Date**. *NOTE**: Current Retirement Plan** will populate automatically.
10. Select **Save**.

You have successfully set up the DRS Calendar for this employee.

You have now completed the process for Adding a New Employee and a Job Instance.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the external link to **Add a New Employee Person Record and Job Instance**. This link will open in a new tab/window.