9.2 Adding a New Employee and a Job Instance w/Volunteer

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

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 Run a Search Match.

Add a New Employee and Job Instance with Volunteer

Add a Person

Navigation: Menu > 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.
    - If the person does have an existing Empl ID, found in the Search Match Results follow steps for Add a New Employee Person Record and Job Instance. http://ctclinkreferencecenter.ctclink.us/m/79718/l/928122-9-2-add-a-new-employee-person-record-and-job-instance

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

Biographical Details

4. The **Modify a Person** page displays.
5. From 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, 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 **First Name**.
10. Enter the **Last Name**.
11. Select the **Refresh Name** button.
12. 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.
15. ***Note:** Leave the Birth State and Birth Location fields blank. Birth Country auto-populates to USA.
16. From the **National ID** section, enter the social security number into the **National ID** field.
17. Review the **Biographical Details** tab for accuracy.

Contact Information

18. Select the **Contact Information** tab.
19. Select the **Add Address Detail** link.
20. The **Address History** page displays.
21. Select the **Add Address** link.
22. The **Edit Address** page displays.
23. Enter the **Street Address** on **Address Line 1** (if there is a P.O. Box you can enter it on Address Line 2).
24. Enter the **City**.
25. Select a **State** from the lookup icon.
26. Enter the **Postal** (Zip) Code.
27. Enter the **County** (optional).
28. Select the **OK** button.
29. **Warning:** If the system does not recognize the address it will list potential alternatives. Select the **Override Address Verification** box to bypass.
30. The **Address History** page displays.
31. This time the address you entered will display on the page.
32. Select the **OK** button.
33. The **Contact Information** tab displays.
34. In the **Phone Information** enter the details regarding the phone contact.
35. Select the **Phone Type** from the drop-down menu.
36. Enter the **Telephone** Number.

37. Enter an **Extension** (Optional).
38. Select the **Preferred** check box.
39. In the **Email Addresses** section, enter the details regarding the email account.
40. Select the **Email Type** from the drop-down menu.
41. Enter the **Email Address**.
42. 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 onboard an employee.

43. Review the **Contact Information** tab for accuracy.

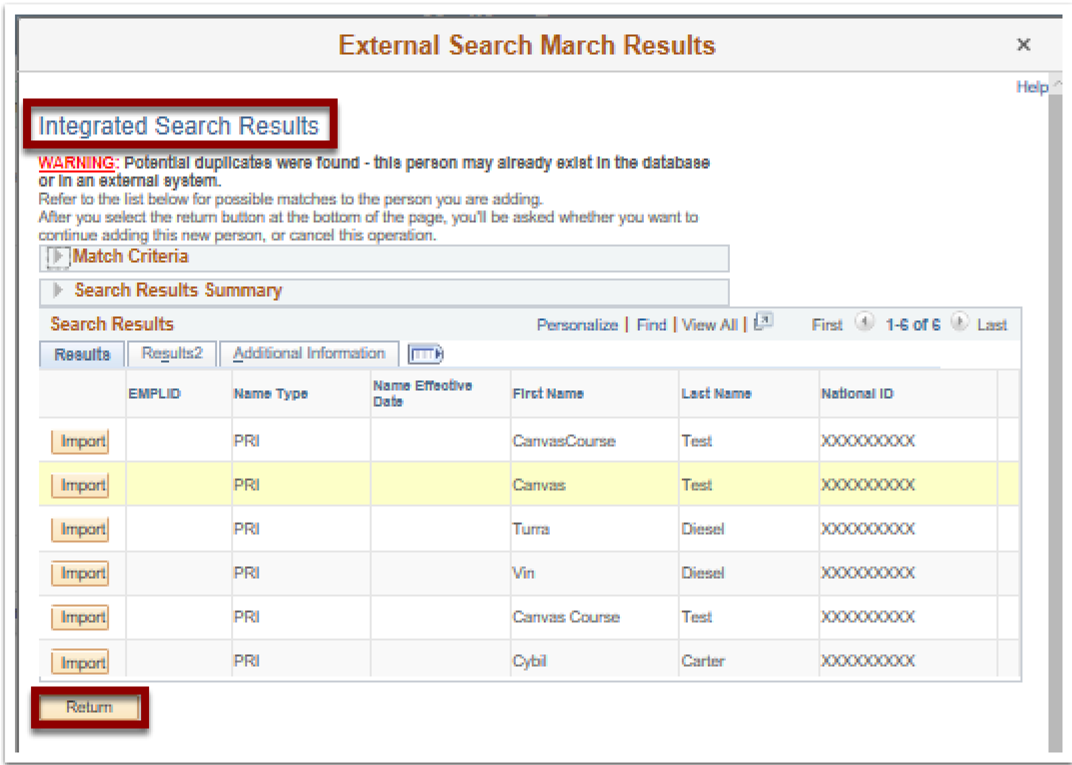
Regional

44. Select the **Regional** tab.
45. Select an **Ethnic Group** from the lookup icon.
46. Select the **Primary** checkbox.
47. Use the fields in the History section to track your I-9 information.

48. In the **Veterans** section: select a **Military Status** from the drop-down menu.
49. If you select a discharge related option, the system will require the **Military Discharge Date**.
50. The **Smoker History** section is optional. The fields do not feed into any other tables.

Organizational Relationships

51. Select the **Organizational Relationships** tab.
52. Select the **Employee** option. **Note**: Employee is the proper option to select for Volunteers.
53. Select the **Select Checklist Code** list; select **HIRE**.
54. Select **Add Relationship.**
55. An **External Search Match Results** pagelet displays.
56. Listed are the **Integrated Search Results** to verify that the person being added does not already exist in the system.
57. Select the **Return** button.



58. A warning message displays asking if you are sure you want to continue.
59. Select the **OK** button.
60. The **Job Data** page displays for use in the next section: Adding a Job Instance.
61. The process to add a person is now complete.

Add 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.**

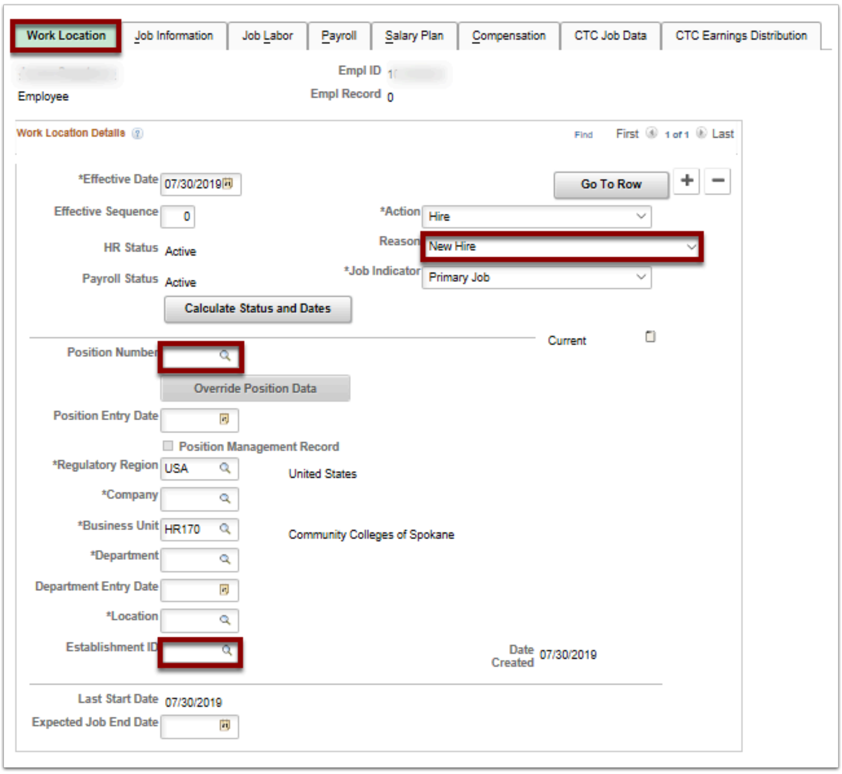
Navigation: Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance

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

1. The **Job Data** search page displays.
2. Enter the applicable search criteria.
3. Select the **Search** button.

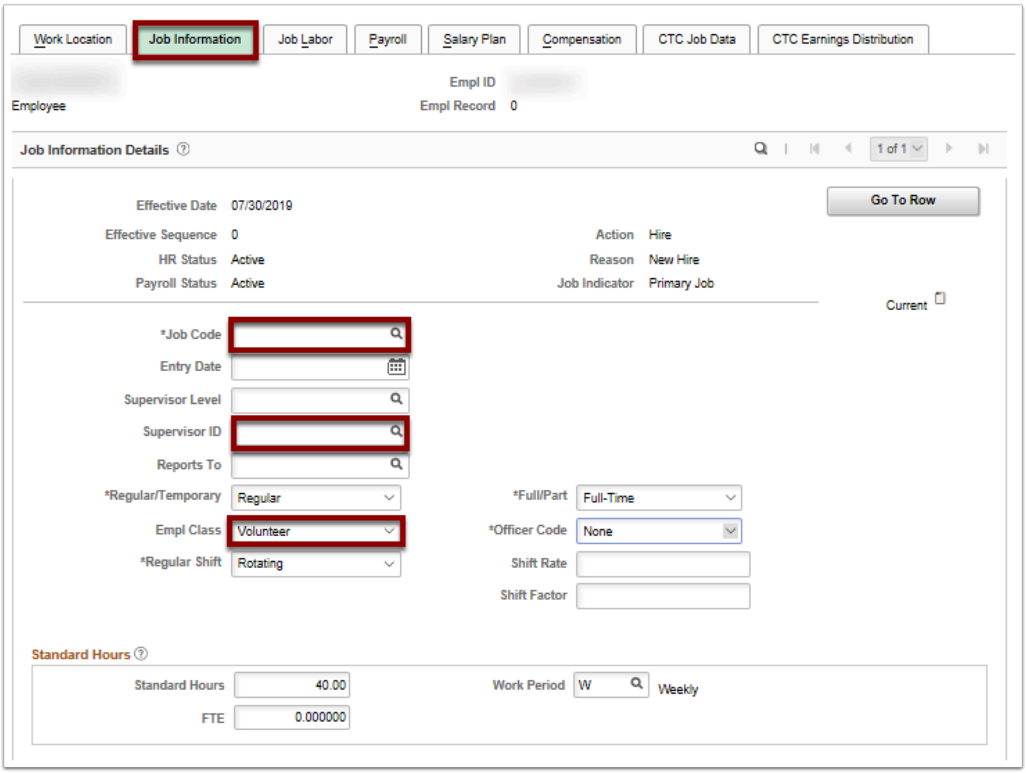
Work Location

4. The **Job Data** page displays.
5. In the **Work Location** tab, Select **New Hire** from the **Reason** drop-down menu.
6. **Note**: Select **New Hire** in the Reason field for **Volunteers**.
7. Alternately, if this person is a **Re-hire** versus a first time hire, you should select this from the **Action** field drop-down menu.
8. Enter or select the desired position by selecting the **Position Number** lookup icon, if applicable.
9. Select or enter the **Establishment ID**, if applicable.



Job Information

10. Select the **Job Information** tab.
11. Select **Volunteer/Intern** in the Job Code field. (If you are updating an existing Volunteer select the Action, "Change of Pay System". This will allow you to make changes to the Payroll System and Absence System.)
12. Select the **Supervisor ID** lookup icon to select the supervisor for the new hire.
13. Select the **Empl Class** drop-down menu and select the appropriate classification for the new hire. **Note:** Select "**Volunteer**" for volunteer jobs.



Job Labor

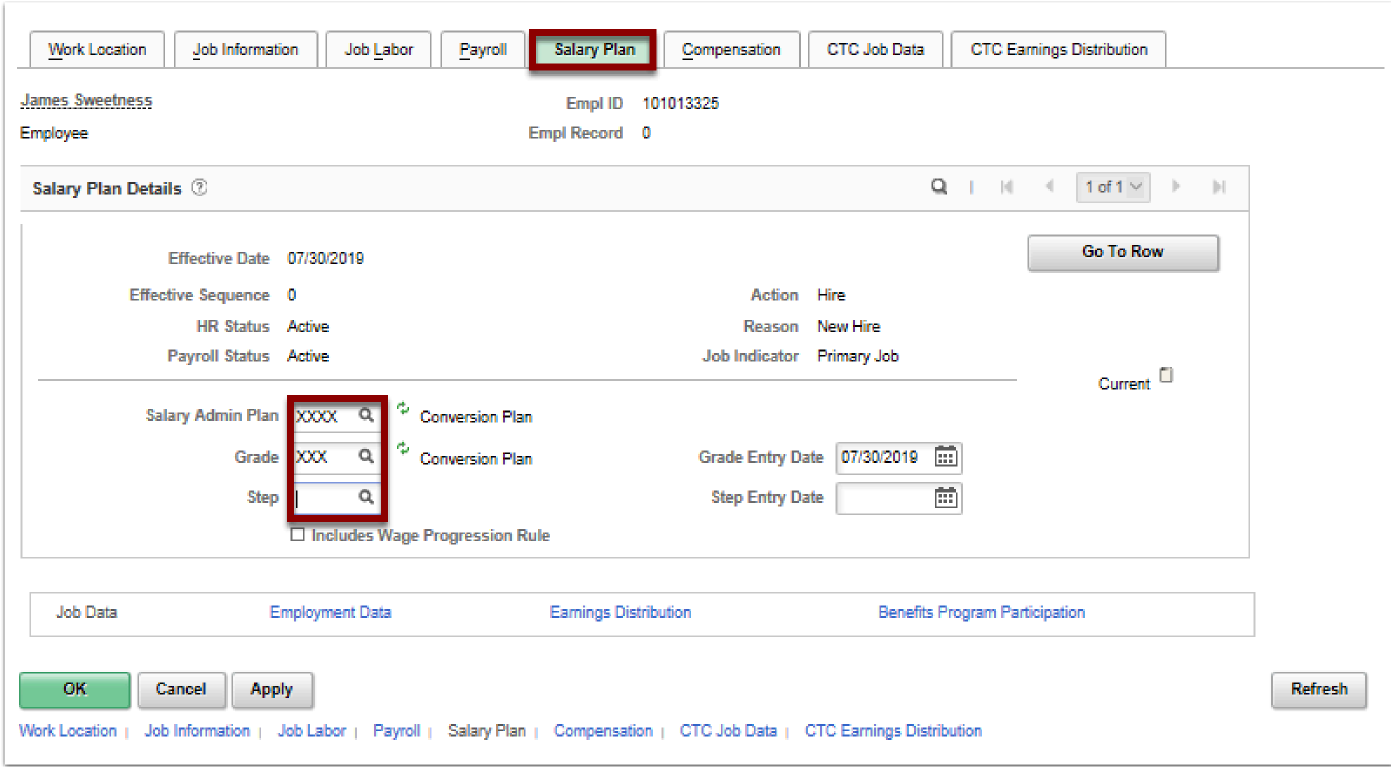
14. Select the **Job Labor** tab.
15. Enter the **Union Code** on the **Job Labor** page, if applicable.
16. **NOTE:** The Union Code will auto populate from the **Job Code Table**.

Payroll

17. Select the **Payroll** tab.
18. The **Payroll System** field defaults to **Payroll for North America**.
19. **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.
20. Select the **Pay Group** lookup icon and select the pay group for the position, if applicable.
21. **Note:** Select V## for Volunteer.

Salary Plan

22. Select the **Salary Plan** tab.
23. **Note:** The Salary Admin Plan and Grade should display XXX for Volunteer positions.
24. Enter the **Salary Step**.
25. **NOTE**: For those that are to receive automatic step pay increases, you must enter the **Salary Admin Plan, Grade and Step.**

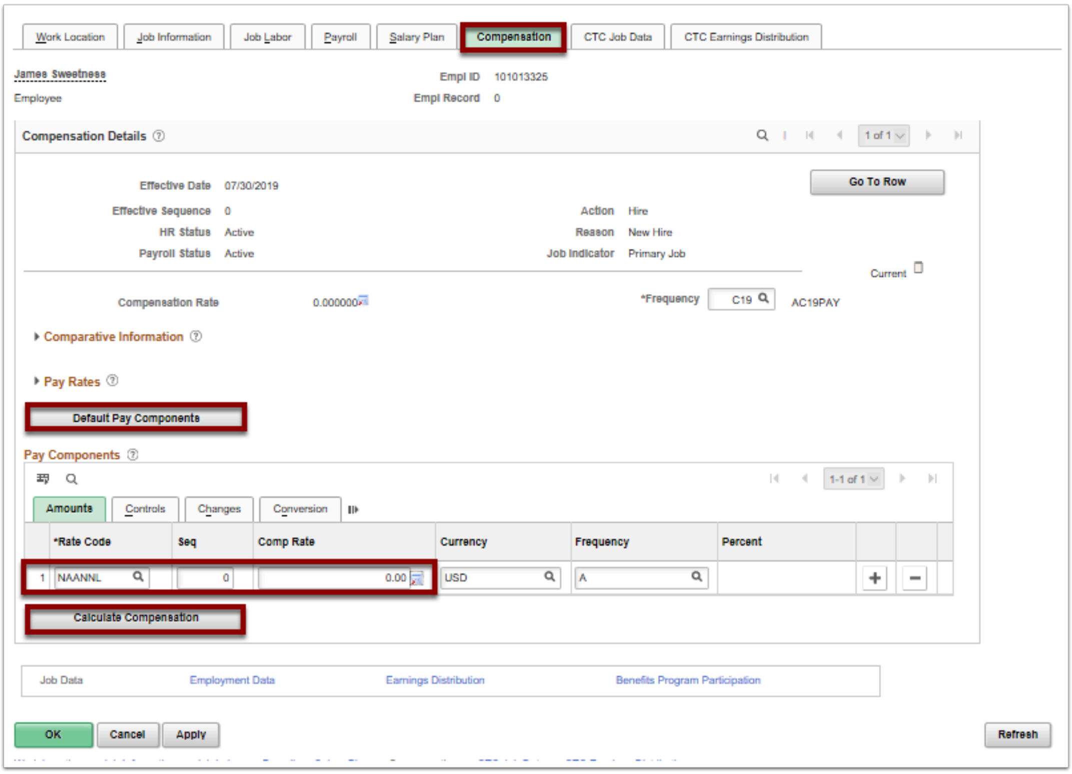


Compensation

26. Select the **Compensation** tab. 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.
28. **Note:** Volunteers will default to 0.00.

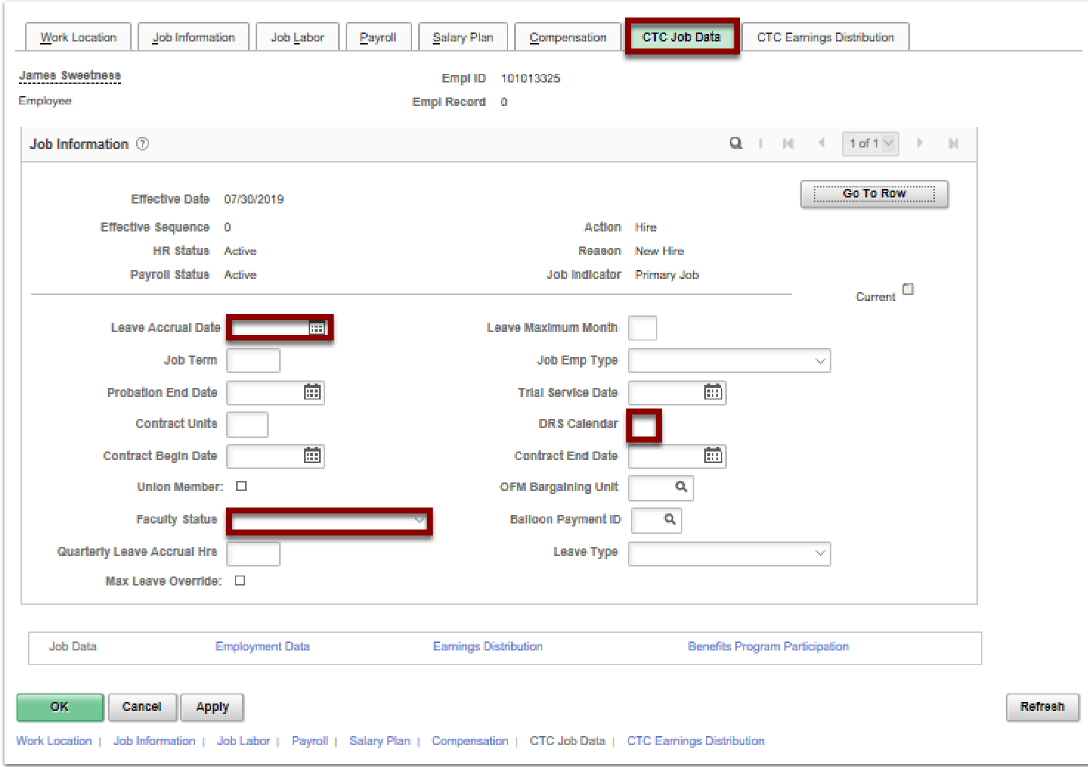
OR:

29. 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).
30. Enter the Comp Rate amount in the **Comp Rate** field.
31. Select the **Calculate Compensation** button to calculate the employee's compensation.
32. **Note:** Volunteers would have a "0.00" compensation rate.



CTC Job Data

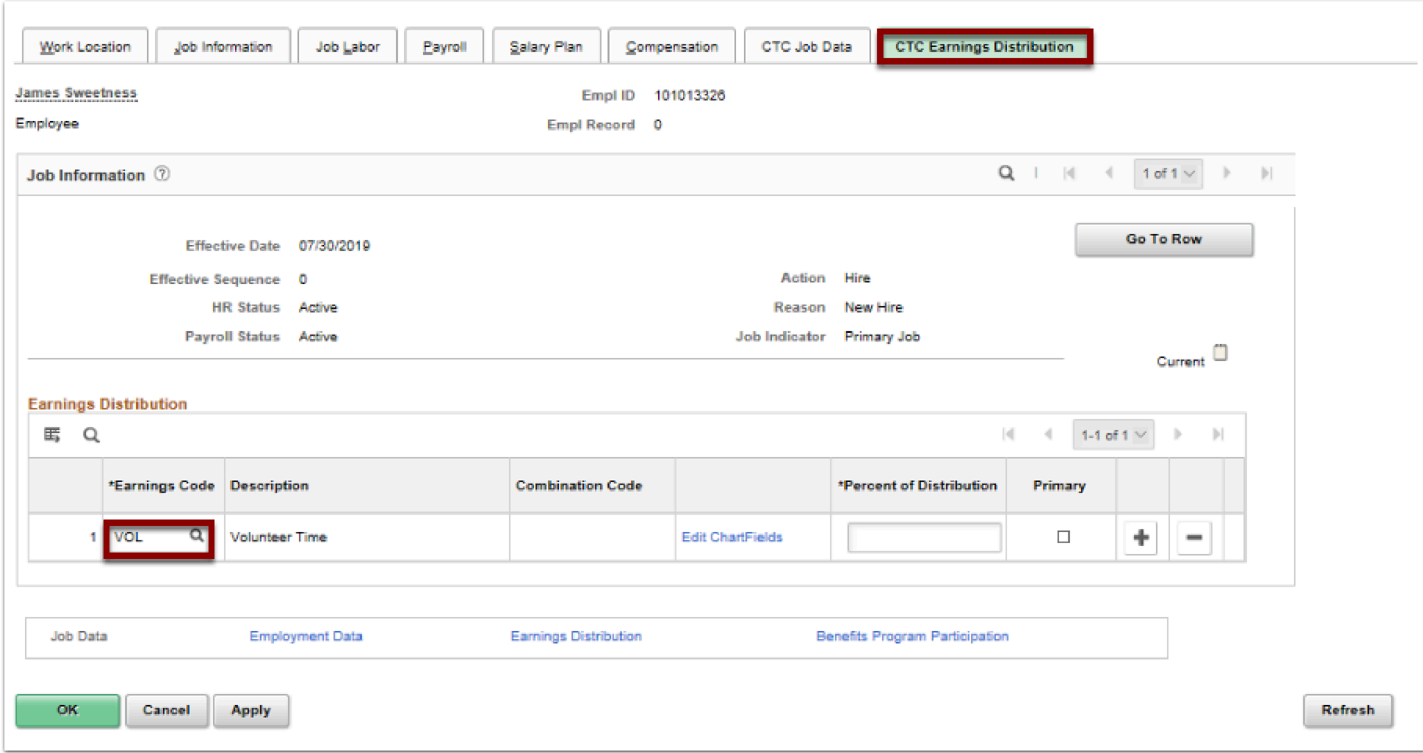
33. Select the **CTC Job Data** tab.
34. Enter the **Leave Accrual Date**.
35. Enter **DRS Calendar**. (This is dependent on Employee Type. Refer to the DRS website for applicable calendar options).
    - Contract Begin Date and Contract End Date Fields will also be dependent upon this information. See QRG, **Using DRS Calendars**: Import DRS Calendar Questions on Hire or Program Change.
36. Select the **Faculty Status** (Optional).



CTC Earnings Distribution

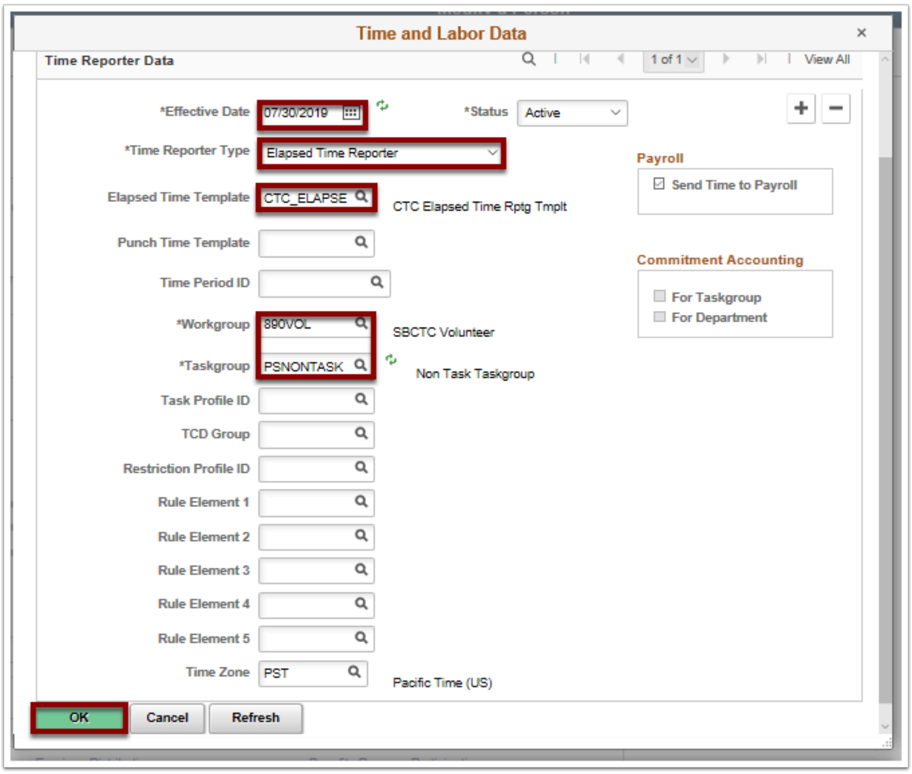
37. Select the **CTC Earnings Distribution** tab.
38. Enter the appropriate **Earnings Code.**
39. **Note**: Earnings code is "VOL" for Volunteers.
40. Select the **Edit Chartfields** link, to select a Combination Code .
41. Enter the **Percent of Distribution** assigned to the selected Combination Code.
42. Select the **Apply** button.

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



Verify Data

43. Select the **Employment Data** link at the bottom of the page.
44. **Note**: Business Title should be "VOLUNTEER/INTERN" for Volunteers.
45. Verify the defaulted values.
46. Select the **Time Reporter Data** link.
47. The **Time and Labor Data** pagelet displays.
48. Enter the **Effective Date.**
49. Select the **Time Reporter Type** (Elapsed or Punch).
50. Enter the **Elapsed OR Punch Time Template** (should coincide with the Time Reporter Type you selected).
51. Select the appropriate **Workgroup** from the menu options. **Note**: **Select "###VOLUNTR" Workgroup for Volunteers.**
52. Select the appropriate **Taskgroup** from the menu options.
53. Select the **OK** button.



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.

For instructions on how to update this information see QRG for **Updating Employment Data**.

54. The **Employment Information** page displays.

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. **If 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.

55. Select the **Benefits Program Participation** link (Lower right hand side of screen), if applicable.

Benefits Program Participation

56. The **Benefit Program Participation** page displays.
57. Enter your college code in the **Benefit Record Number** field.
58. Select the **Benefit Program** lookup icon.
59. Select the desired benefit program.
60. Select the **Apply** 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.

61. Select the **Job Data** link to return to the **Job Data** page.
62. The process to Add a Job Instance with a Volunteer is now complete.

Set Up Employee for DRS Reporting

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

- ZC Benefits Enrollments
- ZD Benefits Enrollment Inquiry

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

Navigation: Menu > Benefits > CTC Customs > Retirement Fields

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

End of procedures.

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 **Adding a New Employee and a Job Instance w/Volunteer**. This link will open in a new tab/window.