9.2 Adding a Person

Purpose: Use this document as a reference for creating a person record in ctcLink.

Audience: HR Administrators/Specialists responsible for maintaining personal information.

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.

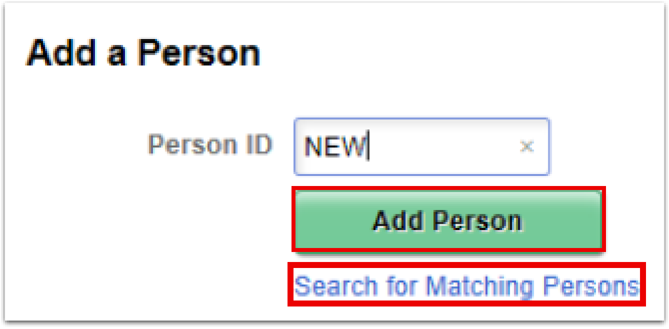
IMPORTANT: Before you begin this process, be sure to perform the Search Match process to verify if the person has an existing Employee ID.

Refer to the QRG titled Performing a Search Match.

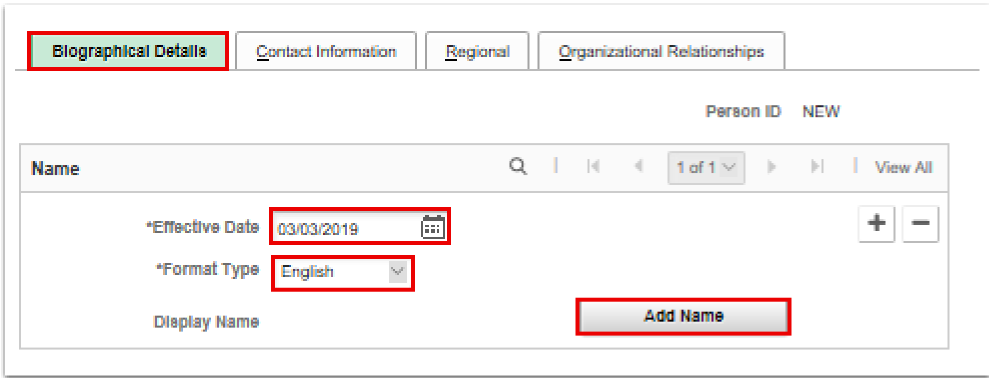
Adding a Person

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

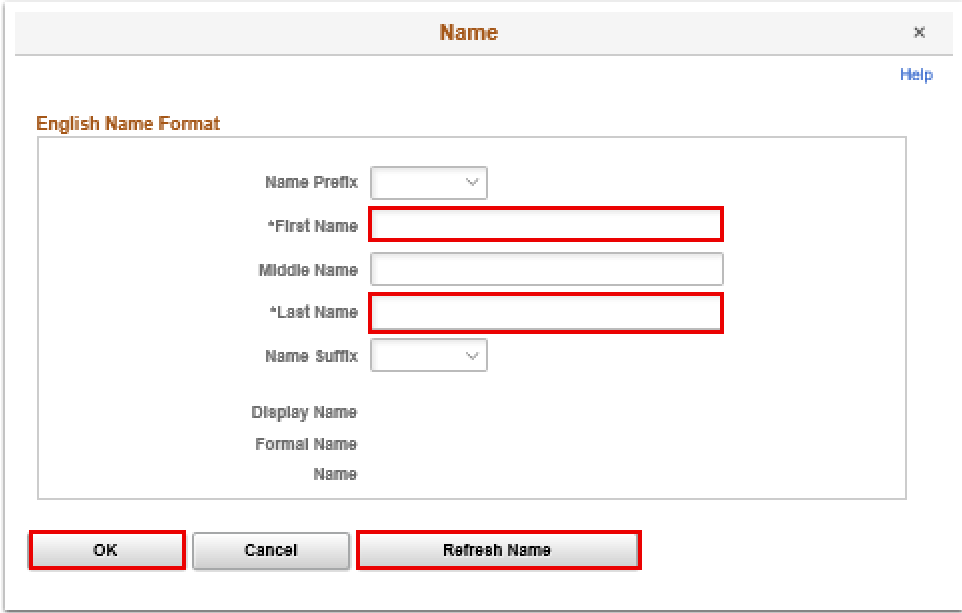
1. The **Add a Person** page displays**.**
2. Before selecting the **Add Person** button, confirm there are no existing Empl ID for the person being added. Select the **Search for Matching Person** link and verify there is no matching results.
3. If the person does have an existing Empl ID, found in the Search/Match Results, follow steps to Add a New Employment Instance.
4. The **Person ID** value will default to **NEW**; leave as is.
5. Select the **Add Person** button.



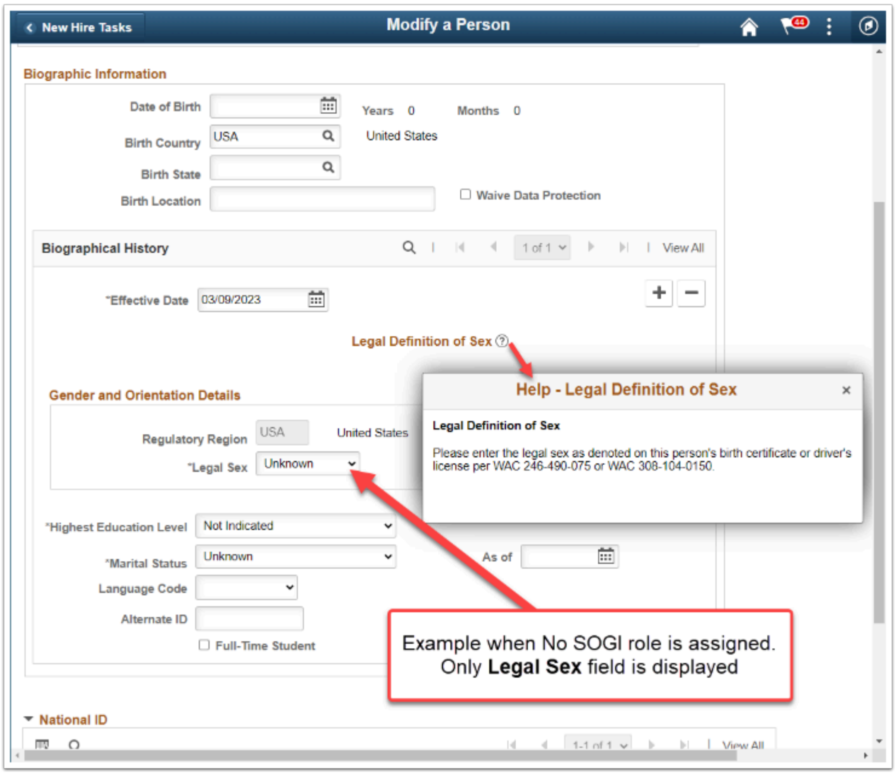
6. The **Modify a Person** page displays.
7. On the **Biographical Details** tab, notice the **Effective Date** will default to today's date, change if applicable. (This is the date the person will now exist in ctcLink; there is no Job or Institute assigned to the person here).
8. Select the **Format Type** from the drop-down menu and select **English.**
9. Select the **Add Name** button.



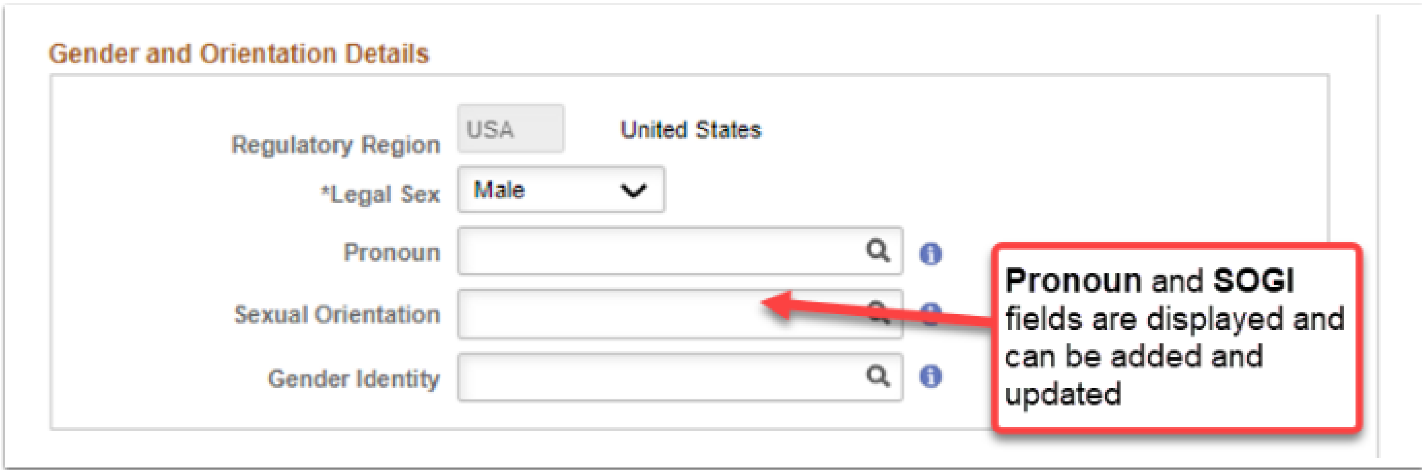
10. The **Name** pagelet displays.
11. Enter the **First Name.**
12. Enter the **Last Name**.
13. Select the **Refresh Name** button. The name will display below the Name Suffix field.
14. Select the **OK** button.



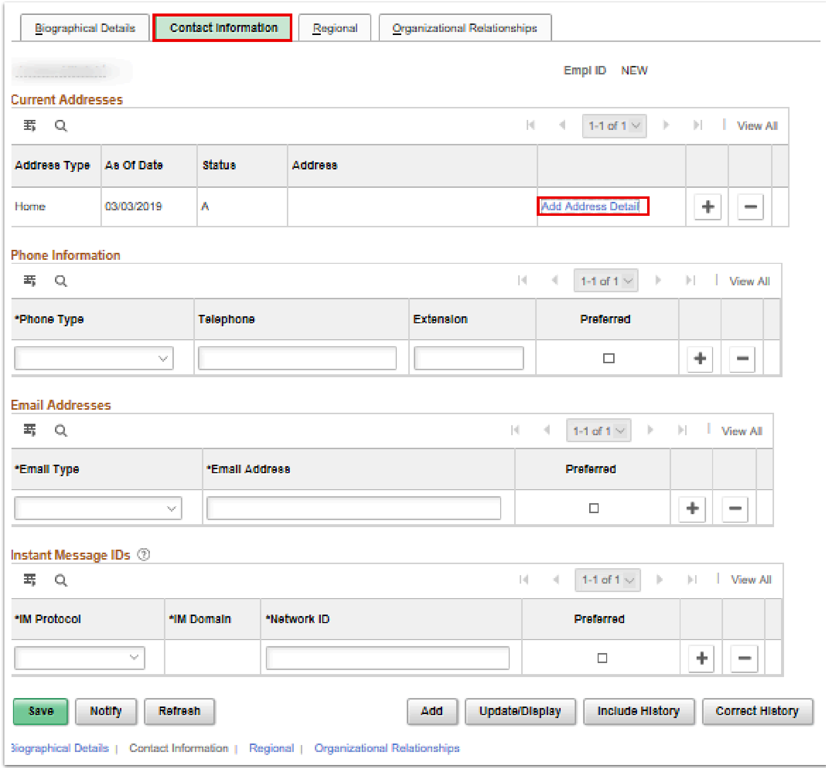
15. The **Biographical Details** tab displays from the Modify a Person page.
16. Enter the **Date of Birth**.
17. The **Birth Country** will default to USA on the user profile preferences of the employee doing the data entry. If needed, it can be changed to another country.
18. **Birth State** and **Birth Location** are not required but can be entered if desired.
19. 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.
    (To review **Legal Definition of Sex**, select the **?** icon to view a pop up window).
20. **Highest Education Level** defaults to A-Not Indicated. If known, the real value can be selected from the drop-down menu. This is information only and does not drive anything. More education data can be stored in profile management.
21. **Marital Status** defaults to 'Unknown'. If known it should be selected from the drop-down menu. This field does not drive taxes. That data is stored in PY.
22. **Language Code** is the employees preferred language. This is information only and only one value can be selected. More information about languages can be stored in profile management.
23. The 'Country' field under National ID subsection defaults to USA. If needed it can be changed if the employee is not a US citizen.
24. The **National ID Type** value defaults to social security number for USA.
25. Enter the **National ID** value. There has to be at least one primary National ID.



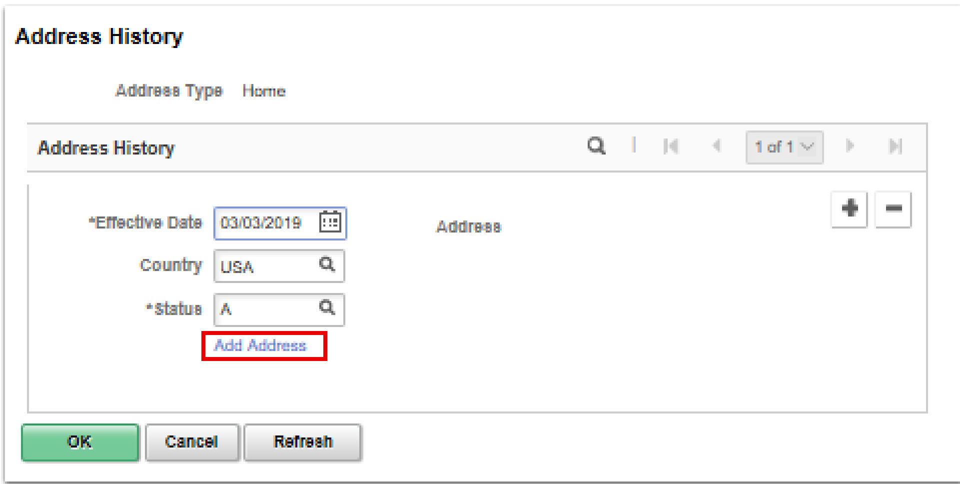
NOTE: If a user has the **ZD HCM SOGI** role and one of roles listed at the top of the QRG to *Add/ Update*, then they will see a different layout on this page which displays the Pronoun and SOGI fields, as seen below.



26. Select the **Contact Information** tab.
27. The **Contact Information** tab displays.
28. Select the **Add Address Detail** link.

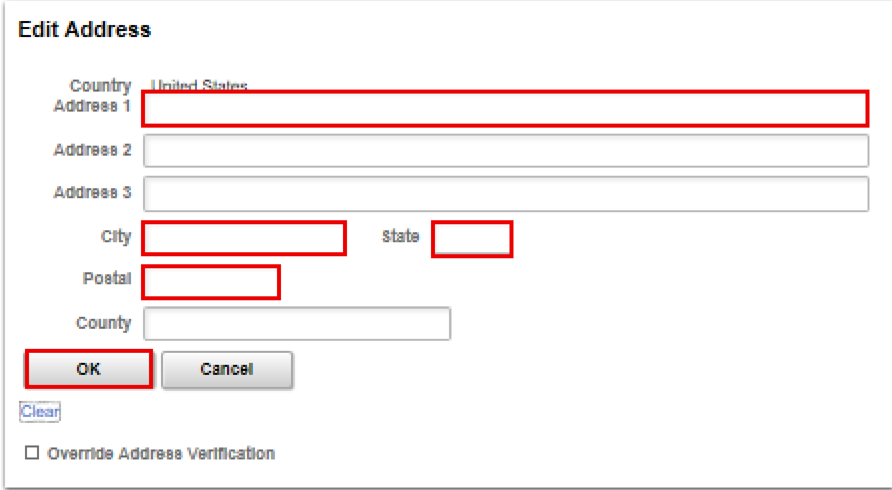


29. The **Address History** pagelet will appear.
30. Select the **Add Address** link.

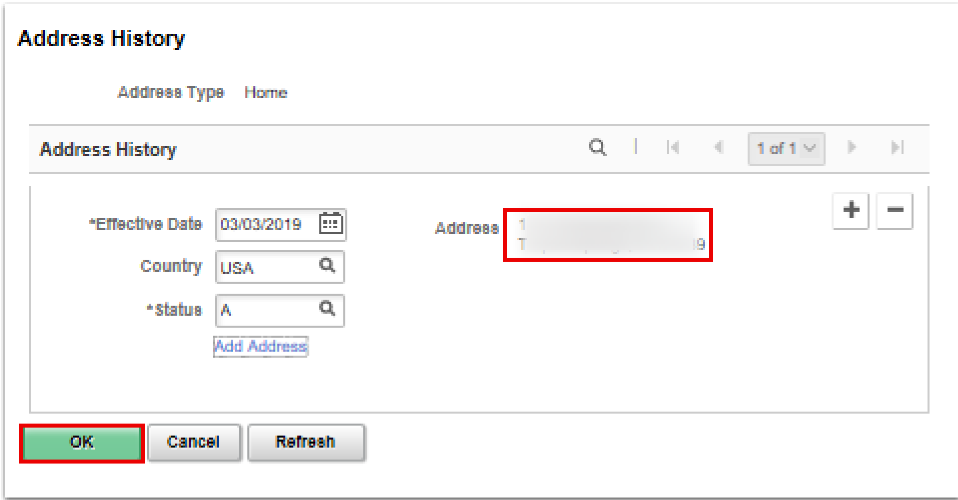


31. The **Edit Address** page displays.
32. Enter the **Street Address** in the **Address 1** field.
33. If there is a P.O. Box you can enter it in Address 2 field.
34. Enter the **City**.
35. Enter the **State**.
36. Once you enter the State the 'Address Validation' functionality (third party tool) will fill in the rest of the fields if that is a valid address. If not, it will show you valid addresses based on what you have entered.
37. Enter the **Postal** (Zip) code.
38. Enter the **County** (optional).

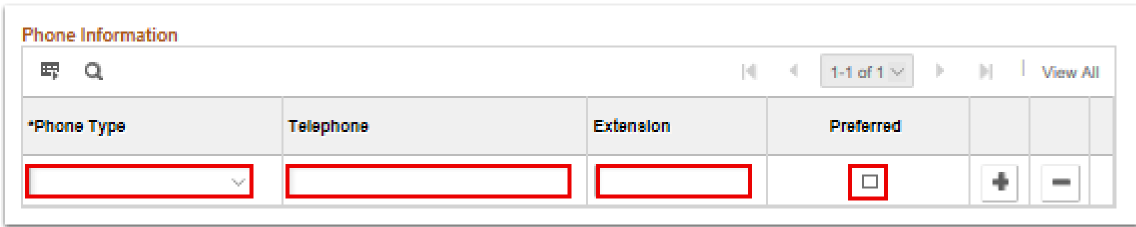
39. Select the **OK** button.



40. The **Address History** page displays.
41. This time the address you entered will display on the page.
42. Select the **OK** button.



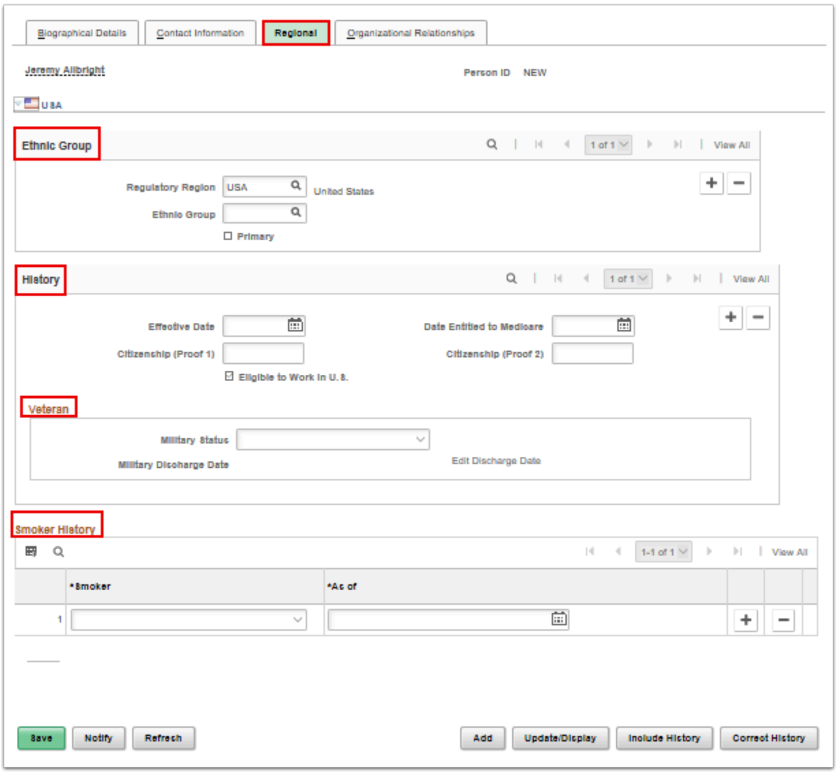
43. The **Contract Information** tab displays.
44. In the **Phone Information** enter the details regarding the phone contact.
45. Select the **Phone Type** from the drop-down menu.
46. Enter the **Telephone** Number.
47. Enter an **Extension** (Optional).
48. Select the **Preferred** checkbox.



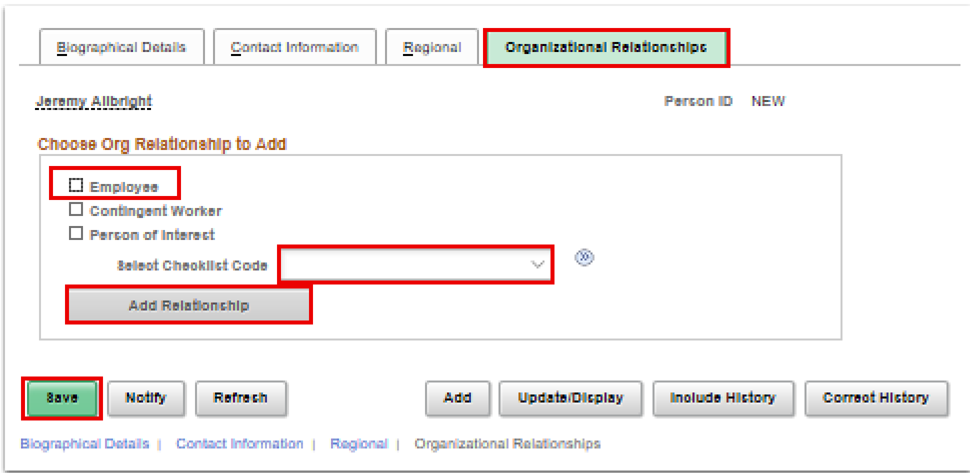
49. In the **Email Address** section, enter the details regarding the email account.
50. Select the **Email Type** from the drop-down menu.
51. Enter the **Email Address**.
52. If the campus (work) email address is known at the time of hire it is important to enter it here during the hire process. There is a custom process that runs at night that will create a user profile for the employee. If the email is entered during the hire it will be included on the user profile which drives workflow.
53. If it is not included during the hire process, HR will need to come back to Personal Data when it is known and update the record. The security admin will also need to update the user profile with the email address.
54. Select the **Preferred** checkbox if applicable.

55. Select the **Regional** tab.
56. The **Regional** tab displays.
57. Select an **Ethnic Group** from the lookup icon.
58. Select the **Primary** checkbox if applicable.
59. Use the fields in the **History** section to track your I-9 information.
60. In the **Veterans** section:
    1. Select a **Military Status** from the drop-down menu.
    2. If you select a discharge related option, the system will require the **Military Discharge Date**.

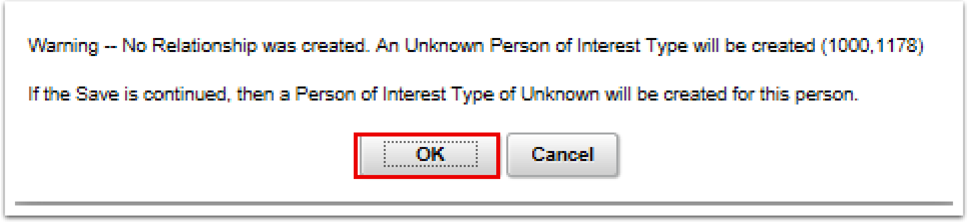
61. The option selected in the **Smoker History** gets displayed on the Additional Information page of Employee Self Service (ESS > Personal Details > Additional Information).



62. Select the **Organizational Relationships** tab.
63. The **Organizational Relationships** page displays.
64. There are three options on this page when hiring a person. For the most part you will always choose 'Employee'. SBCTC does **not** use 'Contigent Worker'. 'Person of Interest' is only used for Volunteers that need access to PSFT.
65. Select the **Employee** option.
66. Select the **Add Relationship** button. The system will check the personal data and make sure it meets any checks and balances the system has. The system checks the person you are entering against both HCM and CS to see if they already exist based on key fields. (Name, SSN, Birthdate etc.)
67. Select the **OK** button.
68. Select the **Save** button.



69. A Message box will appear.
70. Select the **OK** button.



71. The **Organizational Relationships** tab displays.
72. The system will save the record and generate a Person ID (Empl ID).
73. The process to add a person is now complete.
74. End of procedure.