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HCM
Template-Based Hire
Process Overview Session

Version 1.4

08/14/2013

Format and Topics

Part I – Process Overview:

- Background Information
- New Hire Templates & Primary Differences
- Transaction Requirements
- Process Roles & Workflows

Part II – HCM Template-Based Hire Submission:

- Basic System Navigation
- Step-by-Step Instructions for Preparers
- Step-by-Step Instructions for Approvers
- Live demonstration (Preparer and Approver Roles)
- Additional Resources
- Questions & Answers

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Part I - Overview

- Background Information
- New Hire Templates & Differences
- Requirements
- Roles & Workflows

What is HCM?

HCM stands for Human Capital Management. It also refers to a software application that is part of the Rutgers Integrated Administrative System (RIAS), which is a suite of software applications that work together to manage administrative data and processes for the University.

The HCM application is a customized version of Oracle's PeopleSoft product. It supports human resource, payroll, time entry, time approval, and commitment accounting activities.

HCM Unit in UHR

The HCM Unit in University Human Resources (UHR) implements department-initiated employee transactions and university-wide mass salary changes using the RIAS HCM application. The Unit's goal is to ensure all employee data changes are accurate and compliant with state and federal regulations, university policy, and bargaining unit contracts. The area works closely with departmental HCM Preparers and Approvers, as well as with other areas of UHR, the Office of Academic Labor Relations (ALR), Payroll Services, and RIAS.

Note: This presentation focuses on HCM Template-Based Hire (TBH) transactions. Information about commitment accounting activities that happen after a TBH is completed is not included.

What is a Hire Transaction?

When an individual is hired to work at Rutgers, information about the person and the job must be entered into HCM to support that person's employment. This is called a Hire transaction.

Types of Hires

1. New Hire - First time an employee works for Rutgers.
2. Hire - Employee who already works at Rutgers takes an additional assignment at the University.
3. Rehire - Former employee returns after a break in service.

Note: Department Preparers enter all three types into HCM system using the Template-Based Hire process.

What is a Template-Base Hire?

Template-Based Hire (TBH) in the HCM system is an electronic process that allows department Preparers to enter and submit data into HCM to hire a new employee (New Hire) or add another assignment to an existing employee's record in the system.

Information about the employee and the job are entered into a template that has been customized for a particular type of position.

The data entered into the template is routed to, reviewed, and approved by the department HR Approver and, once approved, submitted to the HCM Unit, Academic Labor Relations (ALR), or directly to the HCM database for processing.

New Hire Templates

The following templates are currently available in HCM:

Template Name	Description
CLASS1_FACULTY	Faculty & Post Doc Associates
CLASS1_GRADE_STEP	Staff – Grade Step
CLASS1_REGULAR	Regular Staff Employees
CLASS2_TRADES	Tradesmen
CLASS3_TEMP	Temporary Assignments
CLASS4_HOURLY	Casual/Seasonal
CLASS4_SUM NONEX	Summer Temp 10-Month Nonexempt
CLASS5_STUDENT	Student Hourly
CLASS6_TAGA	Teaching/Graduate Assistants
CLASS7_PTL	Part Time Lecturer
CLASS8_ADDLAPPT	Additional Coadjutant Job
CLASS8_COAD	Coadjutant, Faculty, Research
CLASS9_FELLOWS	Fellows (Stipends)

Note: Be sure to select the template that matches the job.

Primary Differences

Templates take into account standards associated with particular Employee Classes and subcategories, including:

1. Standard Hours - Maximum full-time hours per week differ based on the job (e.g., 15-hours for Class 6 TA/GA vs. 40 hours for certain Class 1 Range & Step Staff, etc.).
2. Job Codes - The list of available Job Codes is specific to the template associated with a particular position type.
3. Required Fields - Some fields are required on all templates, while others are required based on the type of job being filled (e.g., "Expected Job End Date" is required for some positions and not others).

Note: System options, messages and defaulted values are customized to factor in variations in all of the above.

HCM Template-Based Hire Requirements

In order to submit a TBH, Preparers should have:

1. A signed copy of the Offer Letter that contains the appropriate information.
2. Visa/Citizenship information available if the employee is not a US Citizen.
3. Social Security Number.
4. The employee's name exactly as it appears on Social Security Card or Visa document.
5. The date of birth, home address, telephone number, and email address for the employee.
6. Department/Organization Number for where the employee will work.

HCM Template-Based Hire Requirements
(continued)

7. Performed a Global Search in HCM to determine if the person is already in the system.

Note: If the Global Search reveals the employee is already in the system, then a different type of transaction (e.g., Transfer, Reappointment, etc.) may be required. If you are unsure how to proceed, please contact your HCM Specialist for guidance.

Hire vs. Other Transactions

Preparers can use the following to help decide whether to enter a hire, reappointment, or transfer in HCM:

<u>Hire transactions:</u>

- Employee is new (not in HCM at all)
- Employee is "**Terminated**" in HCM
- Employee is "**Active**" in HCM, but this is a new additional assignment or additional dates overlap the current appointment dates

<u>Note:</u> If the employee has more than one job, the other appointment(s) must be compatible with the primary job. See the Multiple Assignment Matrix on the HCM Blog: http://hcmblog.rutgers.edu/

Hire vs. Other Transactions
(continued)

Reappointment transactions:

- Employee's "**HR Status**" is listed as "**Active**" or "**Work Break**"
- Position expired or is about to expire
- Position has a fixed start and end date
- Reappointment job class matches the job class of the previous appointment
- You have an official Reappointment Letter

Hire vs. Other Transactions
(continued)

Transfer transactions:

Employee is "**Active**" in HCM and a major change is happening during an appointment, such as:

- Moving from one department to another
- Changing from Academic Year to Calendar Year
- Changing from one job code to a different job code in the same department

Offer Letter Requirements

Offer letters must be on the department's letterhead and should contain:

- Appointment Start Date
- Appointment End Date (if applicable)
- Job Code
- Job Title
- Compensation Amount
- Hiring Authority's Signature
- Short Description of Job Duties
- Employee's Signature

Note: Letter requirements vary by the type of job appointment and the work to be performed.

Offer Letter Requirements
(continued)

If applicable, letters should also contain:

- Academic or Calendar Year designation
- Term (Fall, Spring, etc.)
- Legal information (e.g., union details)
- Pay begin and end dates, if they are different from appointment start and end dates (applies primarily to non-credit, continuing education courses or workshops)

Offer Letter Requirements
(continued)

If hiring a Class 6 Academic Year (AY) Teaching Assistant (TA) as a Class 5 Student during the summer, a special memo from the hiring authority must be attached to the Class 5 TBH. The memo must contain:

- Employee's Name
- Employee's ID Number
- Employee's Class 6 Job Title
- Description of Class 5 Job Duties
- Name of Employee's Supervisor During Summer
- Start and End Dates of Class 5 Appointment
- Hourly Rate

Visa/Citizenship Information

If the employee is not a US Citizen, Preparers will need the following information to complete a TBH:

- Country of Residence
- Visa/Permit Type
- Date of Entry into Country
- Visa Permit Status
- Status Date
- Status Expiration Date

Note: Preparers are required to enter and update Visa/Citizenship information in the HCM and Guardian I-9 systems. For additional information, please see the following documents:

TBH Visa/Citizenship - HCM TBH Visa/Citizenship Doc

Guardian I-9 - UHR Training Documents

HCM & I-9 Connection

The HCM TBH process and the Guardian I-9 process are closely related. Each uses a different system, but both are associated with the hiring of employees and require actions along similar timelines.

Citizenship and Visa information entered in the Guardian I-9 system supports federal requirements and helps the University remain compliant with federal regulations regarding an employee's eligibility to work in the United States.

Visa/Citizenship data entered into HCM helps Payroll Services determine taxability and helps UHR identify employees who are not pension eligible.

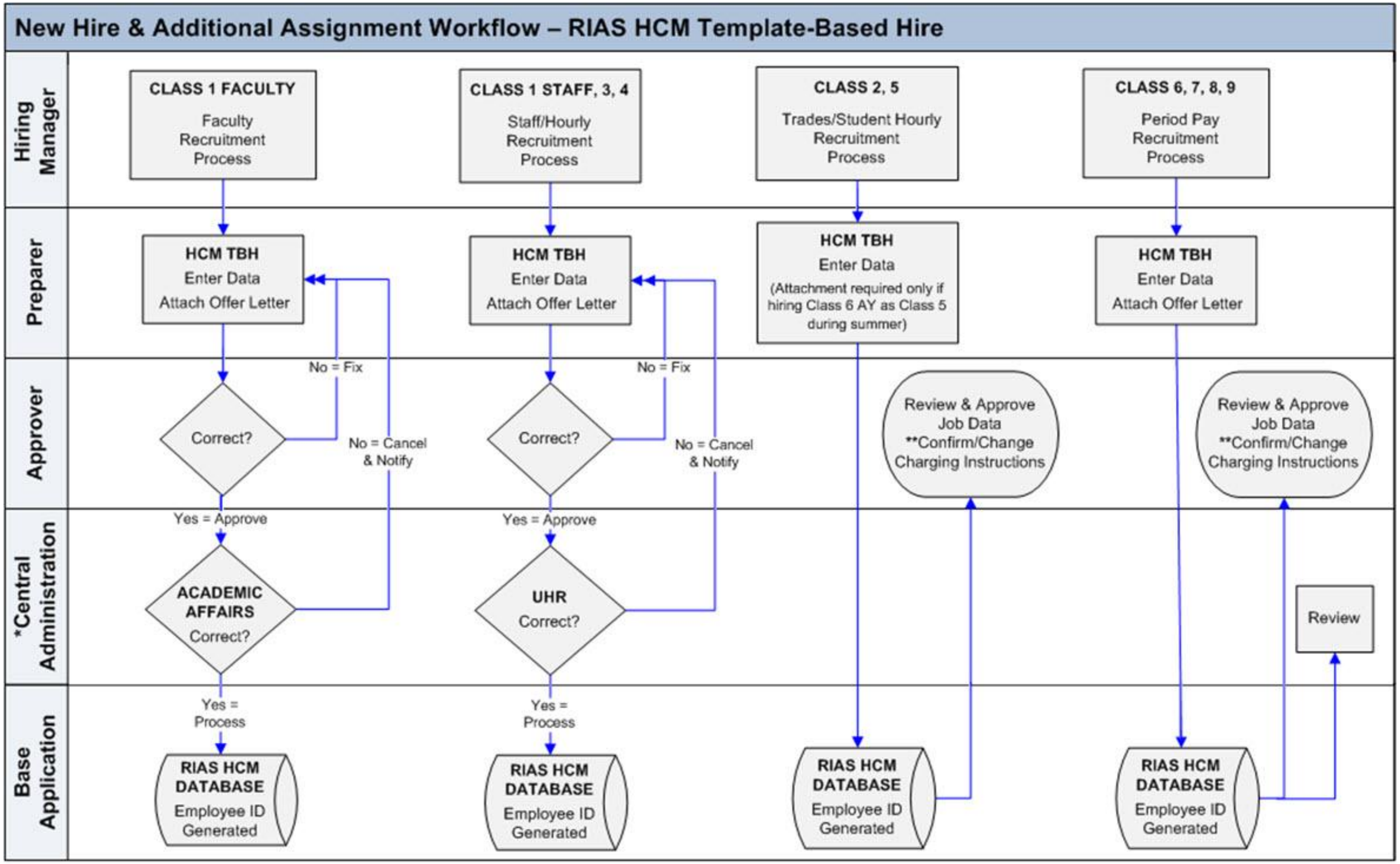
Roles in HCM TBH Process

Department HR Preparers and Approvers work closely together to submit and approve TBH transactions. They also work with the HCM Specialists in UHR and Academic Labor Relations area to finalize the approved transactions

If you encounter problems before, during, or after a TBH is submitted and this presentation does not answer your questions, please contact the HCM Specialist assigned to your department for assistance. If you are not sure who to contact, see the Department HCM Specialist Assignment document on the HCM Blog for names and contact information:

http://hcmblog.rutgers.edu/

TBH Flowchart

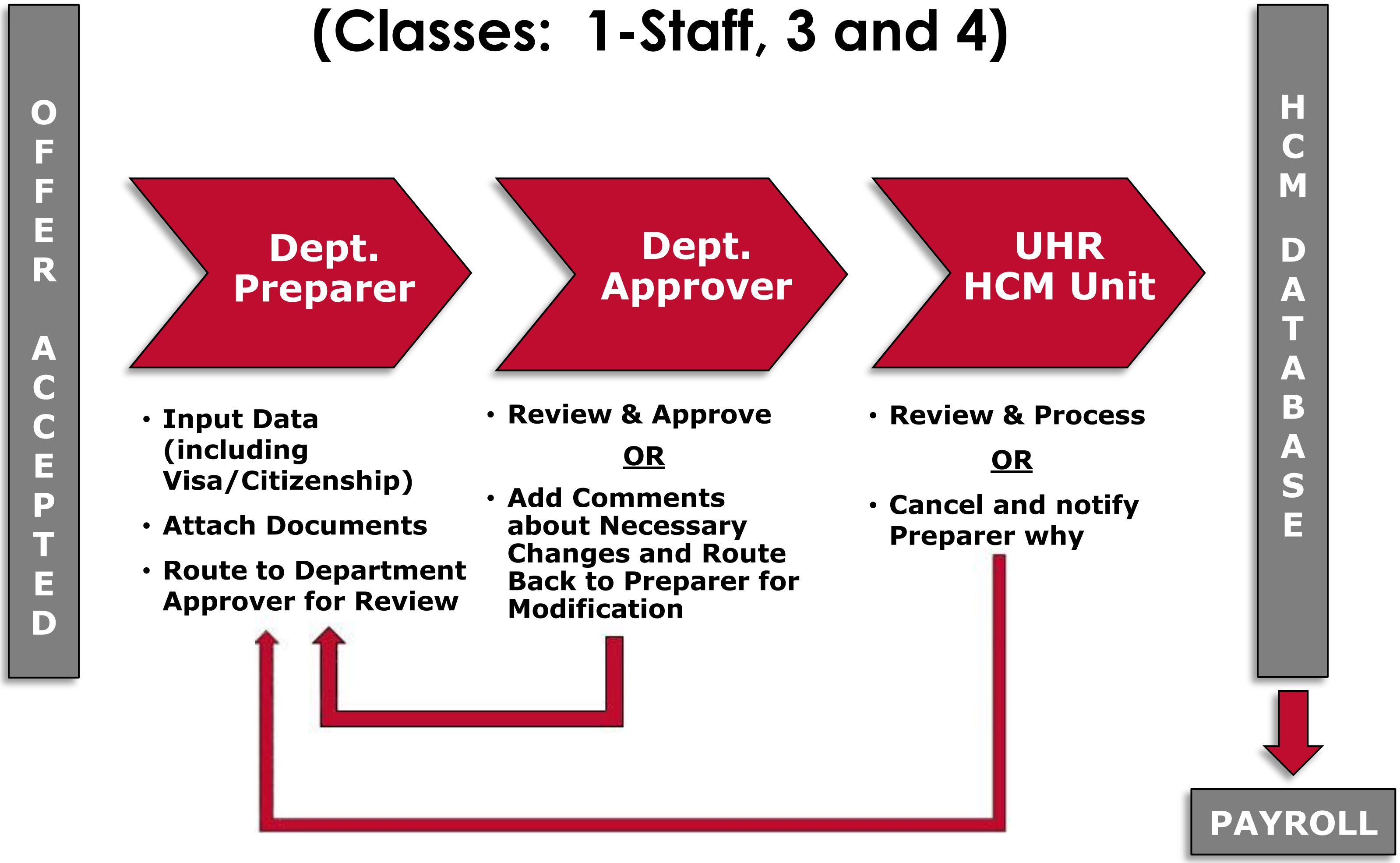


*__Central Administration:__ Class 1 Faculty positions are processed by Academic Affair; Class 1, 3, and 4 Staff positions are processed by University Human Resources (UHR).

**__Confirm/Change Charging Instructions:__ Please see the RIAS Commitment Accounting User Guide for instructions on how to review and change these.

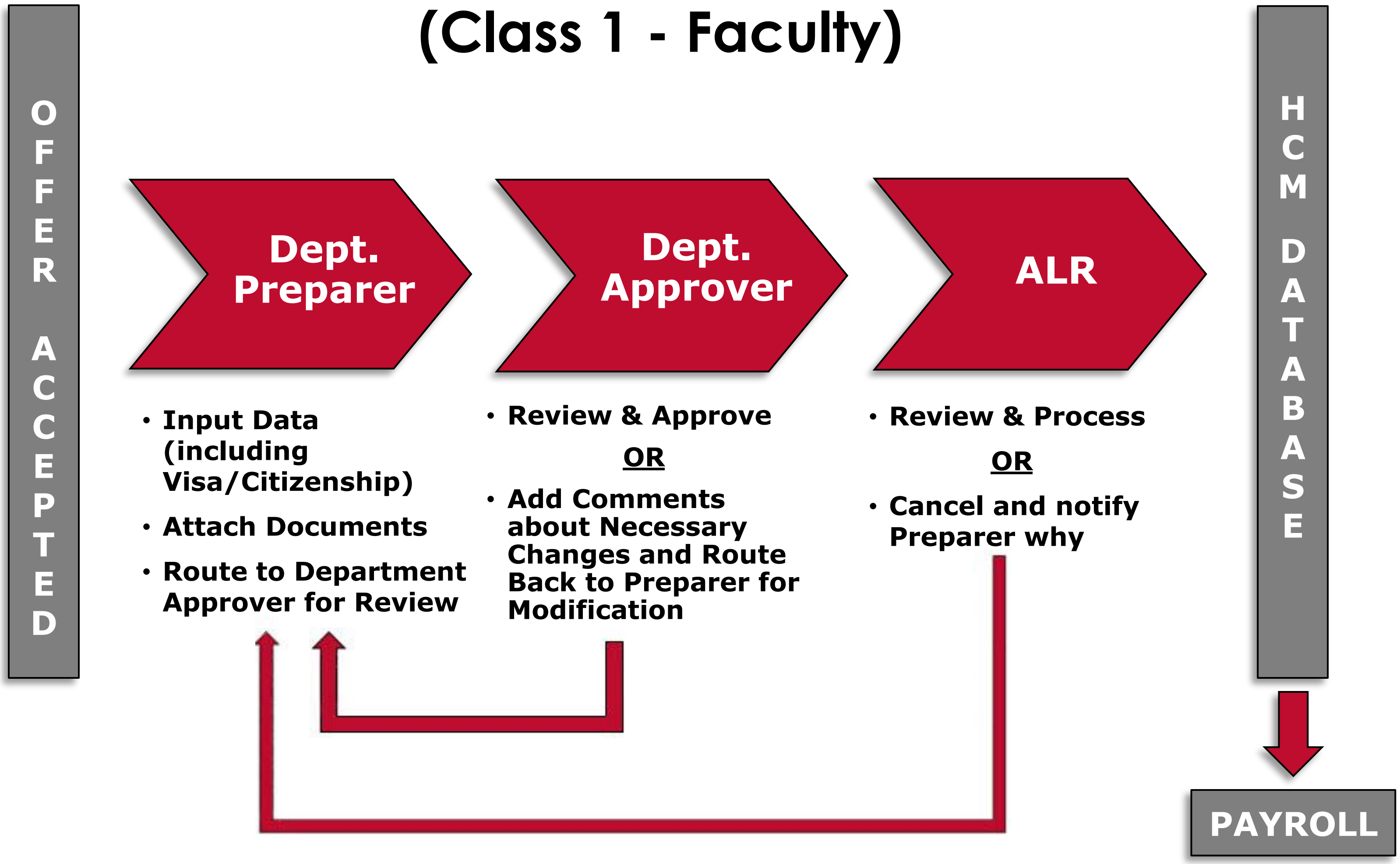
__NOTE:__ If you submit a TBH for someone who already exists in the HCM Database, the system automatically routes the TBH to UHR for review and processing.

HCM TBH Transaction Process - to UHR (Classes: 1-Staff, 3 and 4)



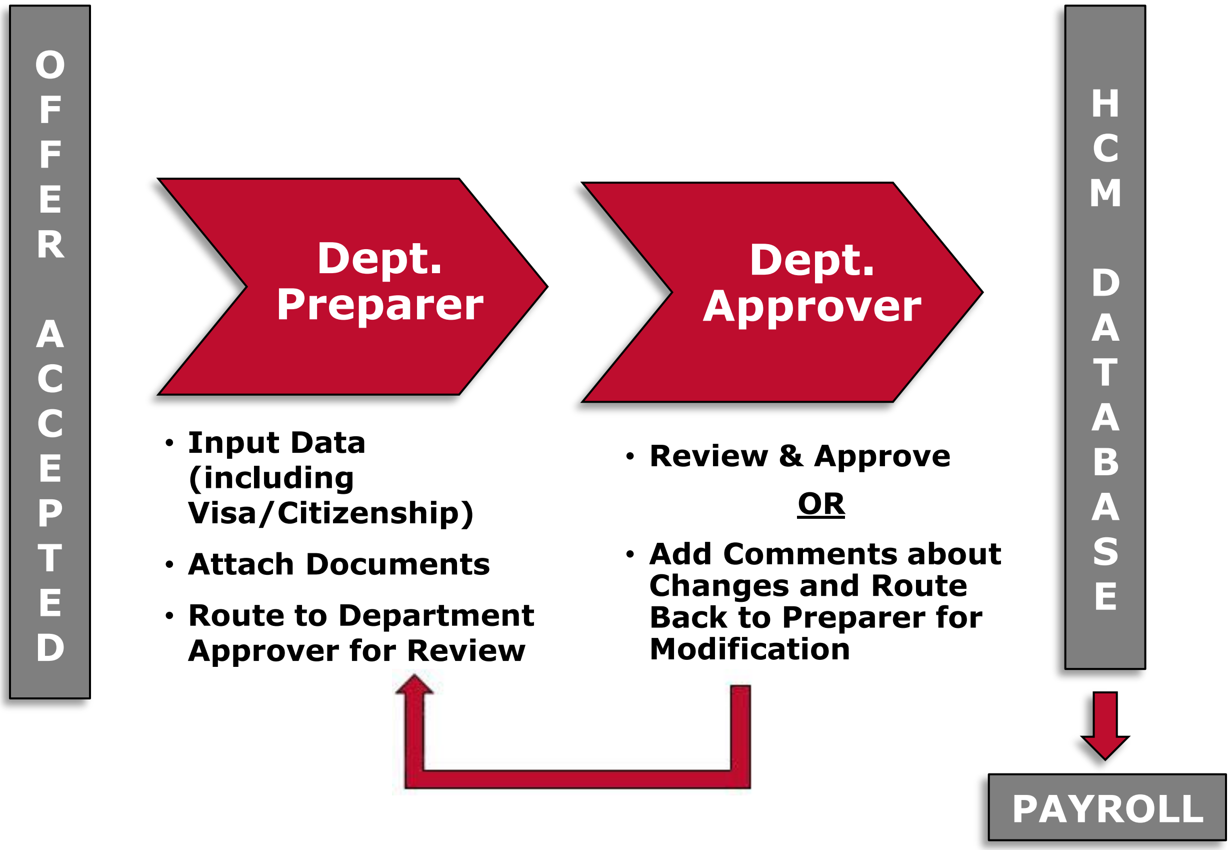
Note: If UHR needs to cancel the transaction, then the Preparer must re-enter it.

HCM TBH Transaction Process – to ALR (Class 1 - Faculty)



Note: If ALR needs to cancel the transaction, then the Preparer must re-enter it.

HCM TBH Transaction Process – HCM Database (Classes: 2, 5, 6, 7, 8, and 9)



<u>Note:</u> If the employee has a valid SSN and this is the first time working at Rutgers, the approved data goes directly to the database. If not, then the transaction gets automatically routed to UHR for processing.

Processing Timelines

The timelines for submission and processing of HCM transactions are driven by the HCM Unit's normal and high volume periods. For specific deadlines, check the "**HCM Job Action Schedule**" on the HCM Blog:

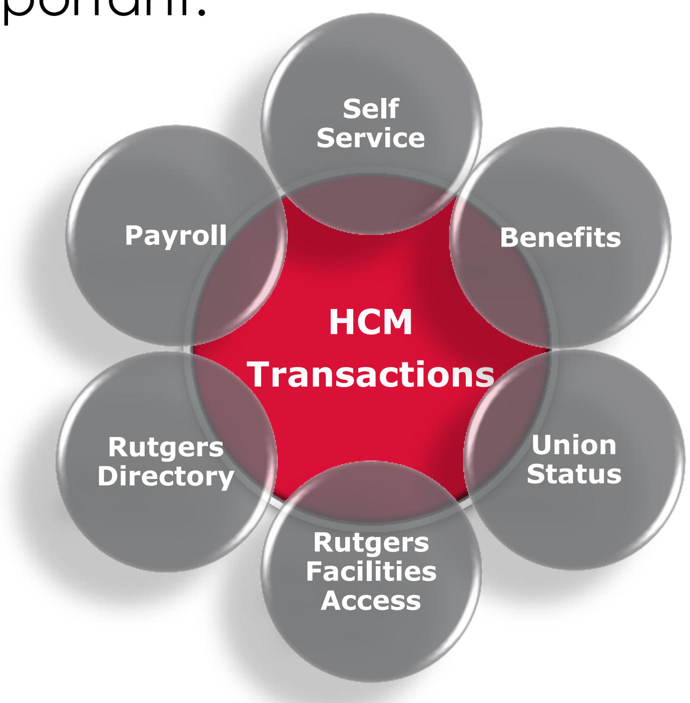
http://hcmblog.rutgers.edu/

The schedule includes specific "**No Earlier Than**" and "**No Later Than**" dates that HCM transactions can be submitted. Preparers and Approvers need to adhere to cutoff dates to ensure timely processing of transactions.

Note: Submission dates occasionally change due to holidays, mass salary implementations, etc. Schedule changes are communicated via the HCM Blog.

HCM Data and Other Systems

Data entered into HCM feeds other University systems that impact many areas of an employee's work life. Therefore, accurate and timely submission of transactions is extremely important.



Part II – HCM TBH Submission

- Basic System Navigation
- Instructions for Preparers
- Instructions for Approvers
- Live Demonstration
- Additional Resources
- Questions & Answers

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Basic System Navigation

RIAS Login

Users must log into RIAS to access the HCM application. To log in, click on the "**RIAS Login**" link on the RIAS website, enter your NetID and password, and then click on the "**LOGIN**" button.

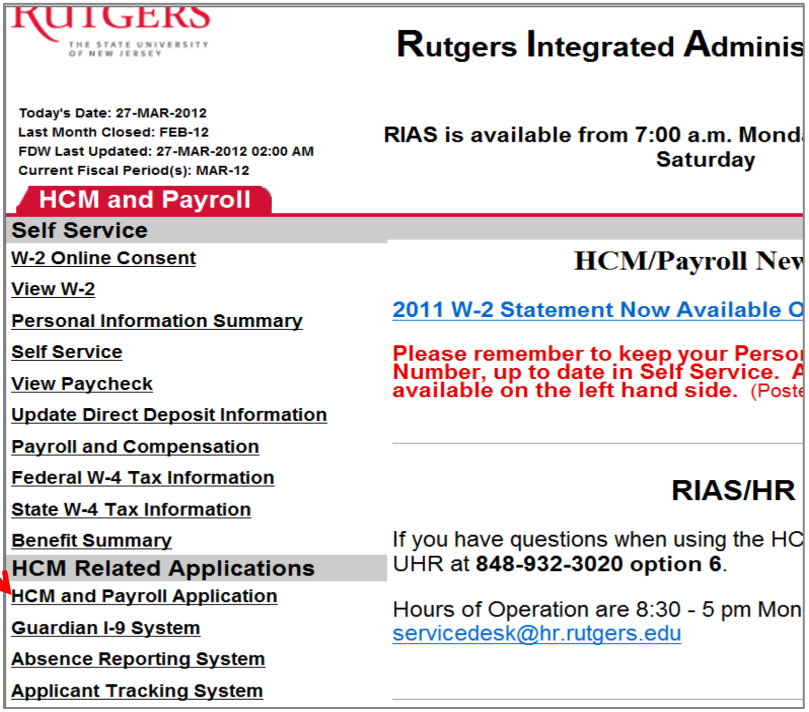
Website: http://rias.rutgers.edu/

Link to RIAS Login

HCM Application Link

Approved users access the HCM system by clicking on the "**<u>HCM and Payroll Application</u>**" link from the RIAS Gateway screen under the "**HCM Related Applications**" heading.

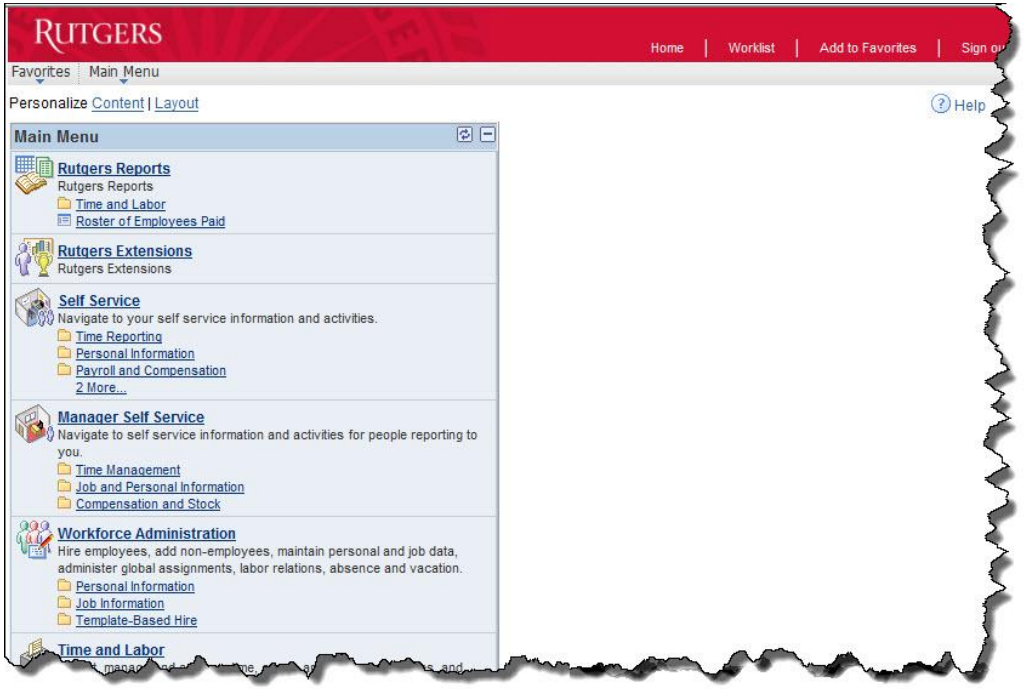
Link to HCM System



Navigation Basics

Home Screen

After you click on the "**HCM and Payroll**" link, the system brings you to the Home Screen. What you see on this screen depends on your role and the type of access you have.



Navigation Basics
(continued)

Universal Header Bar

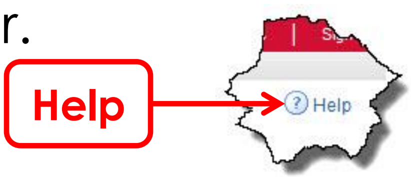
PeopleSoft's Universal Header Bar is located at the top of the application page. It contains links that remain static as you navigate through other pages.

Navigation Methods

PeopleSoft provides users with several different ways to navigate through the system. Methods can be mixed and mingled. The way you choose to navigate is a matter of personal preference. Methods include:

- Drop-down menus
- Favorites
- Breadcrumbs
- Groups/Folders (a.k.a. Menu Pagelets)

Several methods are explained on the following screens. For more detailed information, click on the "**Help**" button in the Universal Header Bar.

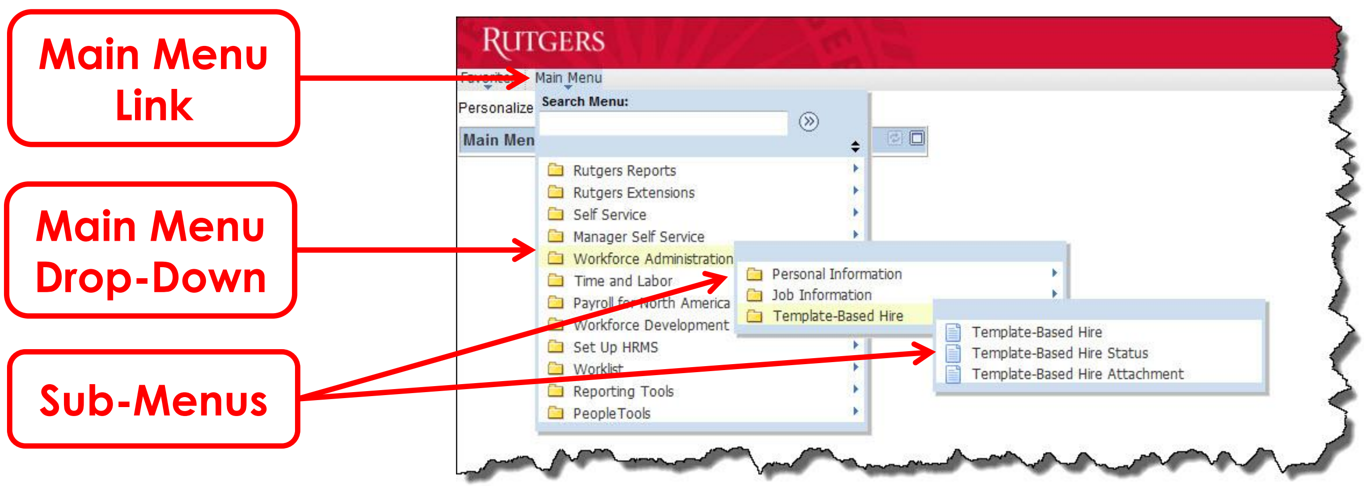


Navigation Methods

(continued)

<u>Drop-Down Menu Navigation:</u>

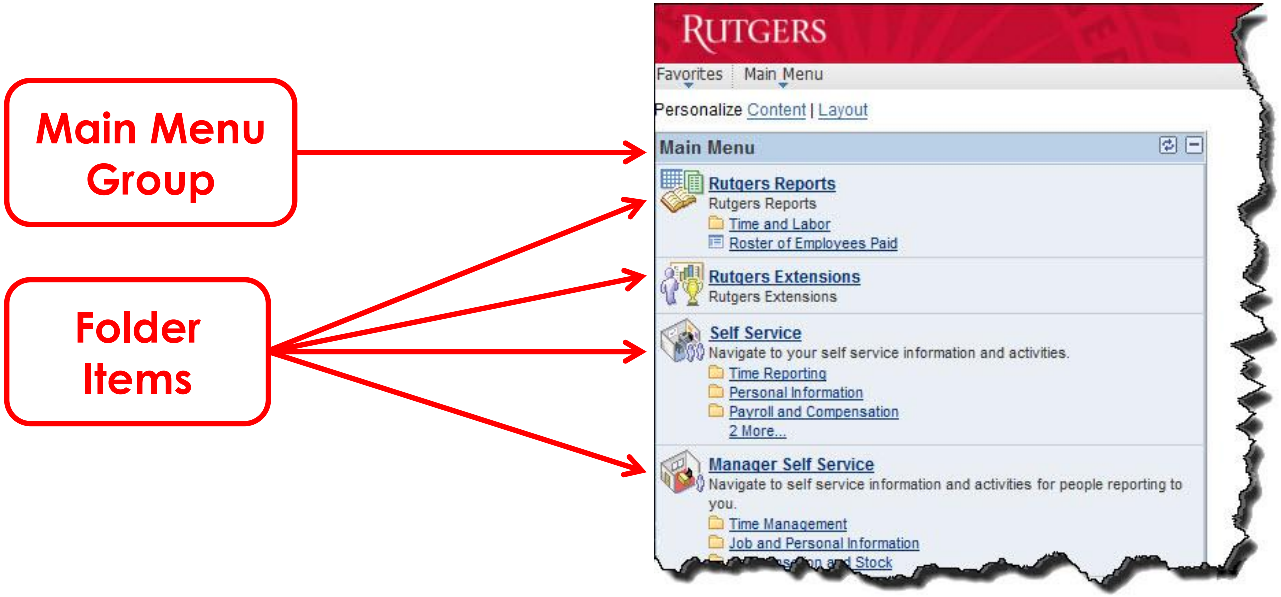
Click on the "**Main Menu**" link in the top left-hand side of the screen to activate a drop-down menu. Then, hold your cursor over the words in the drop-down to display cascading sub-menus below and to the right of the previous drop-down menu.



Navigation Methods
(continued)

Groups/Folders:

You can also click on a folder in the "**Main Menu**" group near the center of the screen to access any of the folder items displayed in the window.

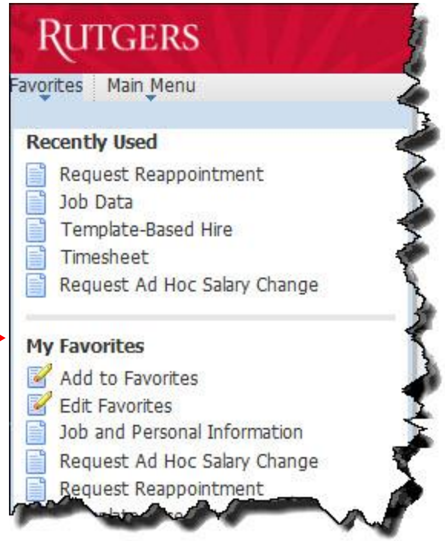


Navigation Methods
(continued)

Favorites:

You can also use the "**Favorites**" feature to access frequently used items. To add an item to "**My Favorites**" drop-down list, go to the item (e.g., "**Template-Based Hire**") and then click on the "**Add to Favorites**" link in the top right of the screen.

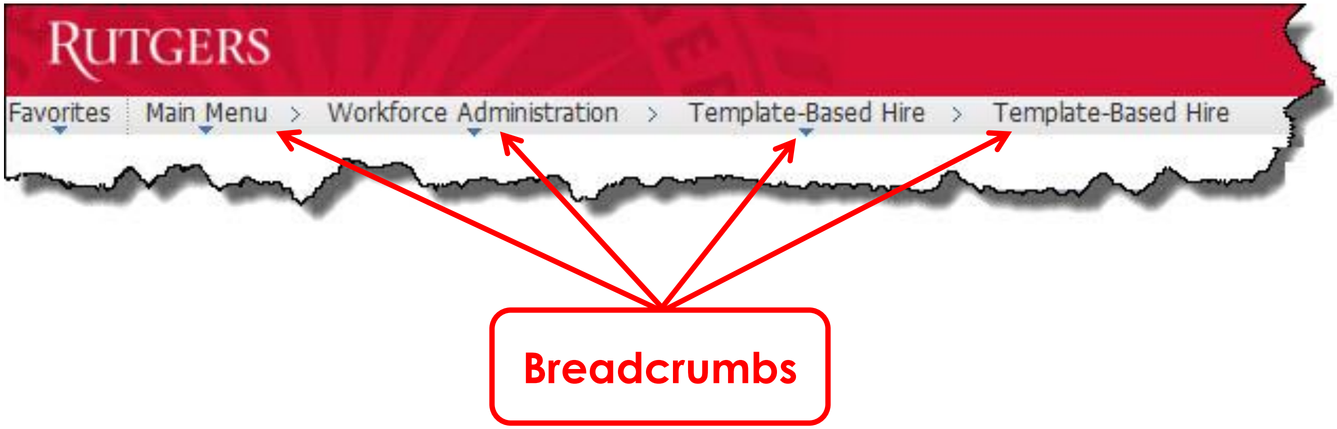
Favorites Drop-Down Menu List



Navigation Methods
(continued)

Breadcrumbs:

As you move from the Main Menu to other areas, visual links appear at the top of the screen. These links are called Breadcrumbs. Breadcrumbs display the path taken to get to a screen. You can click on any of these to move to a particular point on the path.



System Icons

The following icons are available to assist Preparers with entering information:

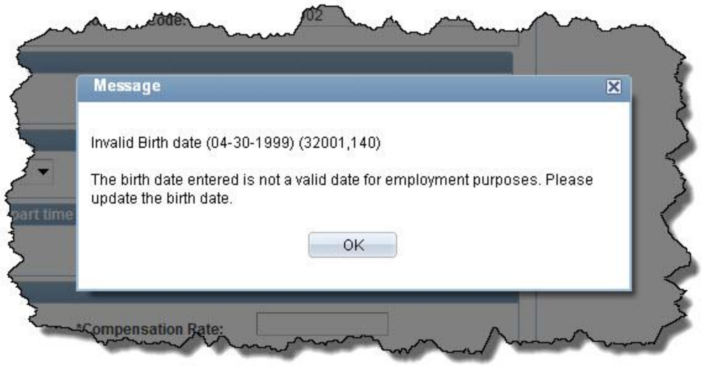
Icon	Action
	Choose a date from the calendar.
	Look up or search for a value.
	Select a value from a drop-down list.

When one of these icons appears next to a data entry field, users can click on them to open a drop-down list, look up a value, etc.

Warning/Information Messages

The system displays messages to help users enter data so it meets certain requirements. Please be sure to read the content of the messages presented.

In the following example, the Preparer received this message because the system is coded to prevent hiring of employees under age 14.

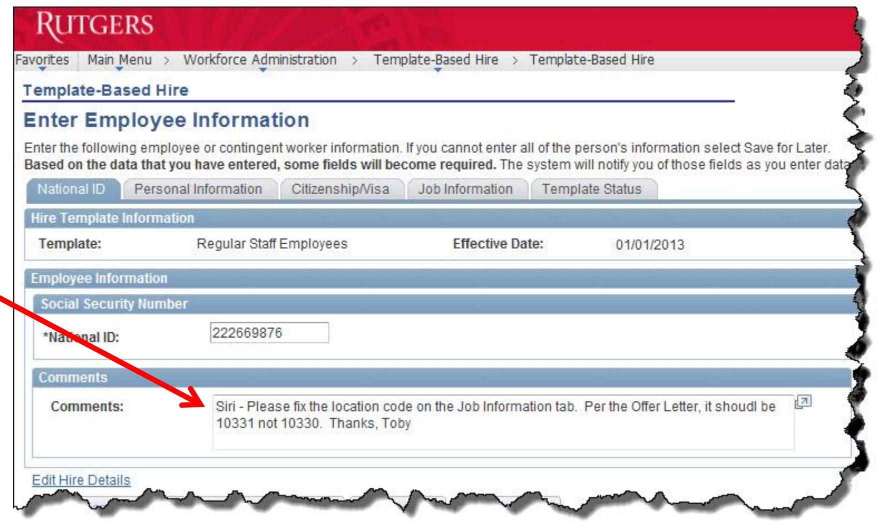


<u>Note:</u> In some cases you will not be able to move to the next step until you enter missing information or correct errors.

Comments Fields

Preparers and Approvers should enter notes for each other directly into the "**Comments**" field at the bottom of the "**Employee Information**" screen. The comments entered remain visible no matter what tab is active.

Example of a Note Entered by an Approver to a Preparer about Required Changes.



<u>Note:</u> If comments were entered by someone else, be careful to position your cursor <u>after</u> any existing text to avoid overwriting them.

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Instructions for Preparers

(Initial Submission)

Workforce Administration

To submit a TBH transaction, Preparers log into HCM and navigate to Workforce Administration using one of the navigation methods described earlier.

From the Workforce Administration menu, navigate to the "**Template-Based Hire**" group and click on the "**Template-Based Hire**" link.

Steps to Enter a TBH

Entering a Template-Based Hire transaction is a multiple step process. The steps are:

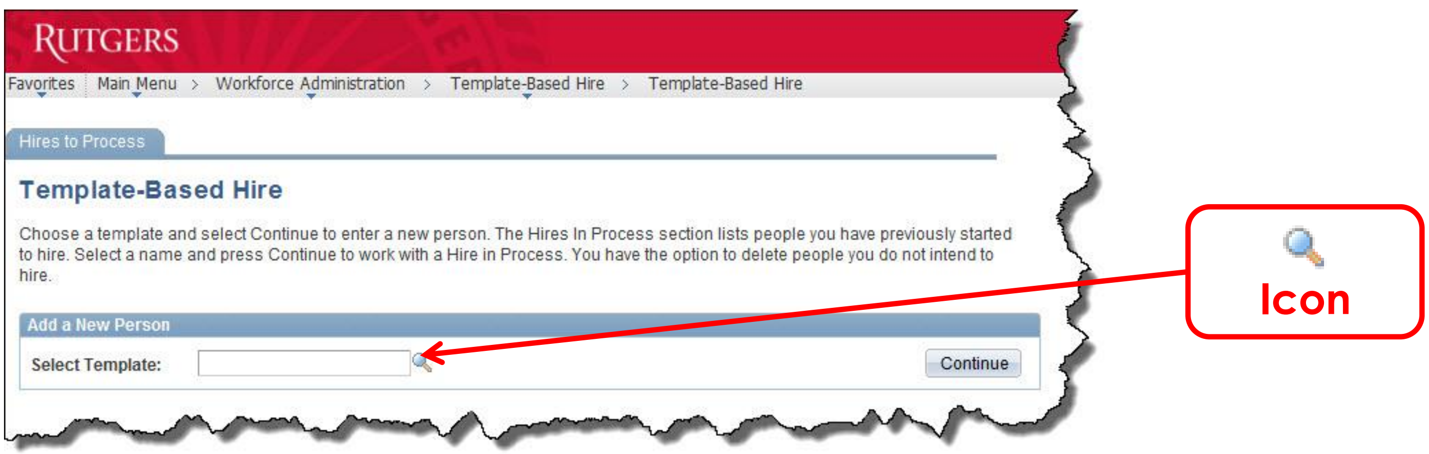
1. Select Template
2. Enter Job Effective Date
3. Enter Data into Data Fields on the Template (e.g., National ID, Personal Information, etc.)
4. Attach Required Documents (e.g., Offer Letter)
5. Submit to Department Approver for Review and Approval
6. Modify TBH, if necessary, and Resubmit

Each step is described in more detail on the following slides.

Template Selection

The Offer Letter should indicate the type of position being filled. Preparers select the appropriate template from the list on the "**Hires to Process**" screen based on the information contained in the letter.

1. Click on the " " icon next to the "**Select Template**" field to open the list of available templates.

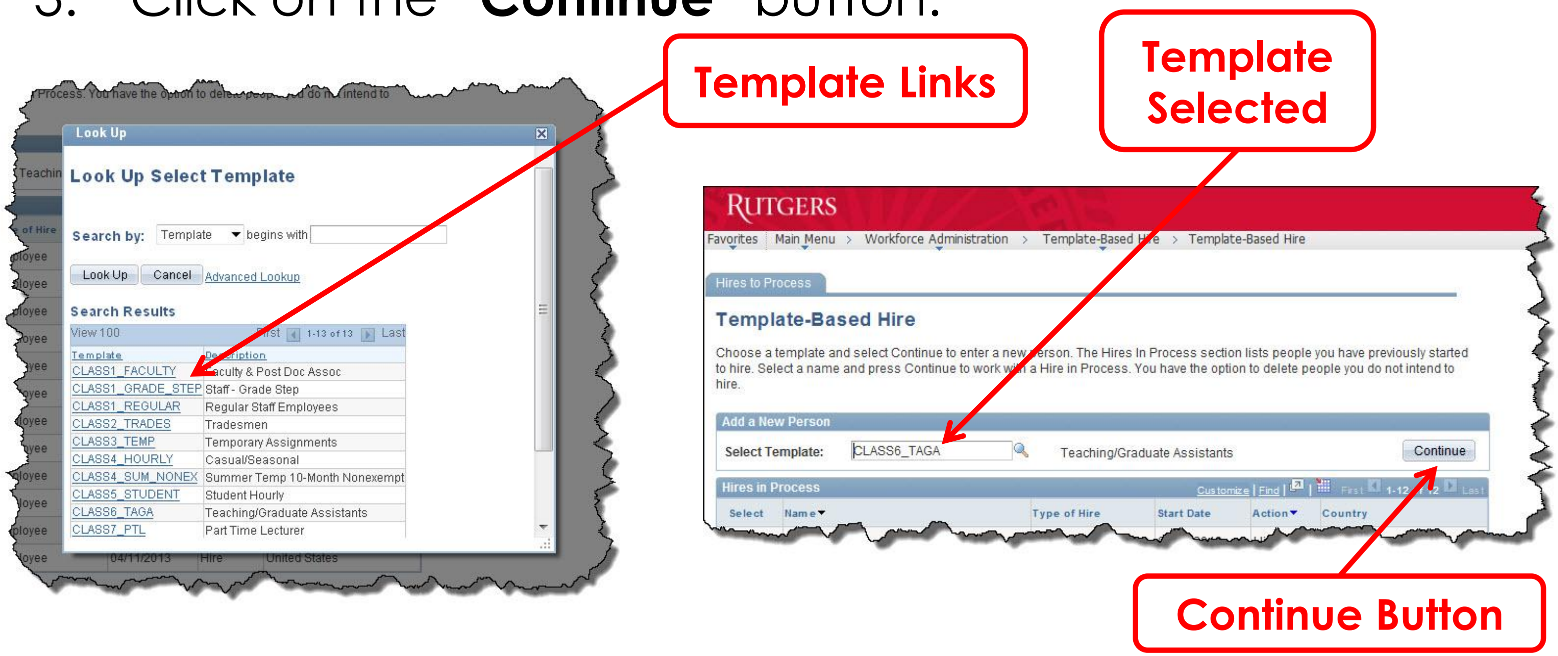


Template Selection

(continued)

2. Locate the appropriate template on the list and click on the link in the "**Template**" column to select the one you need. It will display in the "**Select Template**" field.

3. Click on the "**Continue**" button.



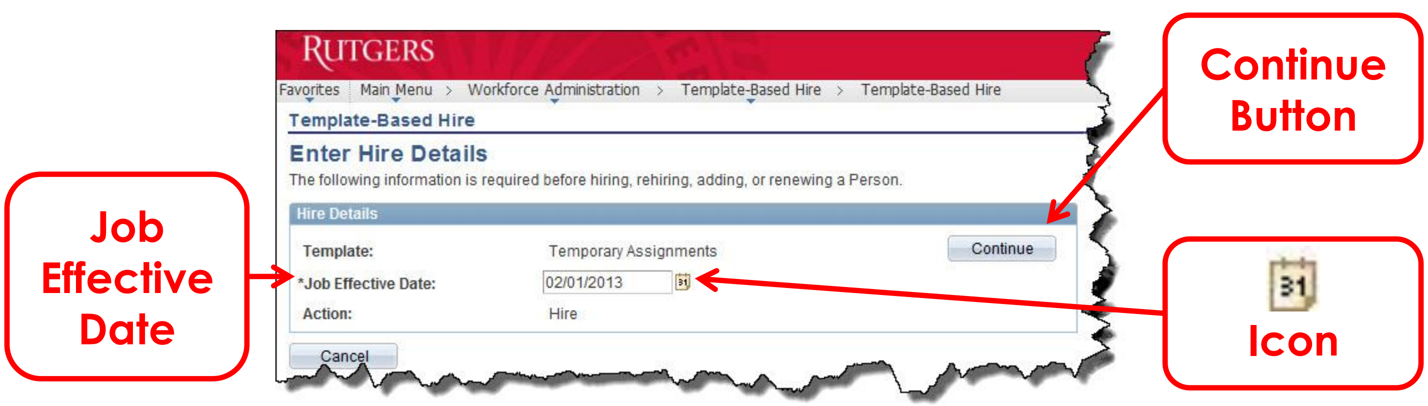
Enter Effective Date

Locate the date the job goes into effect in the Offer Letter. It is usually a date in the future, but it can be today's date or a date in the past.

1. Type the date into the "**Job Effective Date**" field using MM/DD/YYYY format or click on the " " icon and select a date from the calendar.

   Note: The system defaults to today's date.

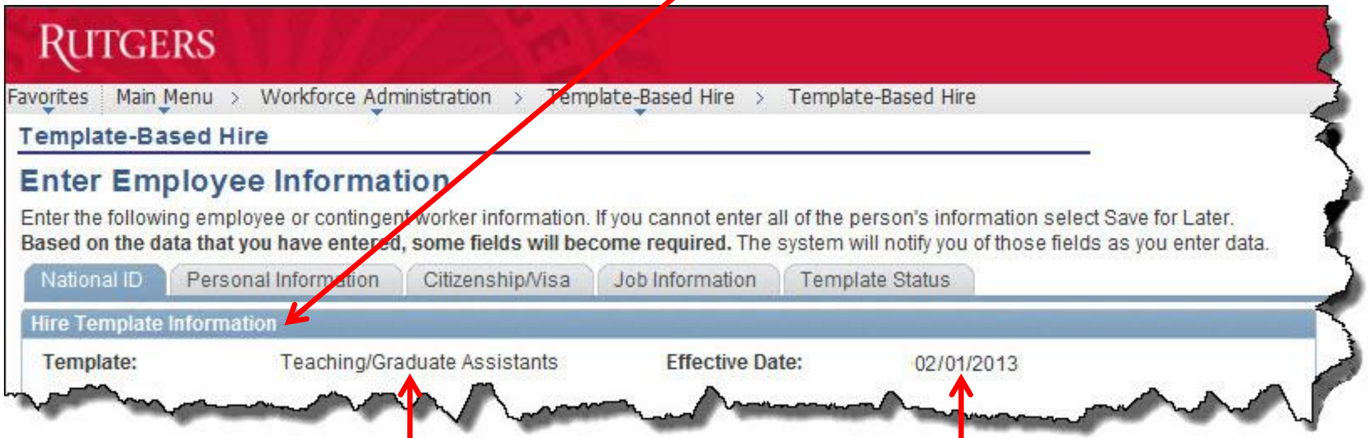
2. Click on the "**Continue**" button.



Enter Employee Information

The "**Enter Employee Information**" screen appears next. The template you selected and the effective date you entered displays in the "**Hire Template Information**" area of the screen under the tabs.

Hire Template Information

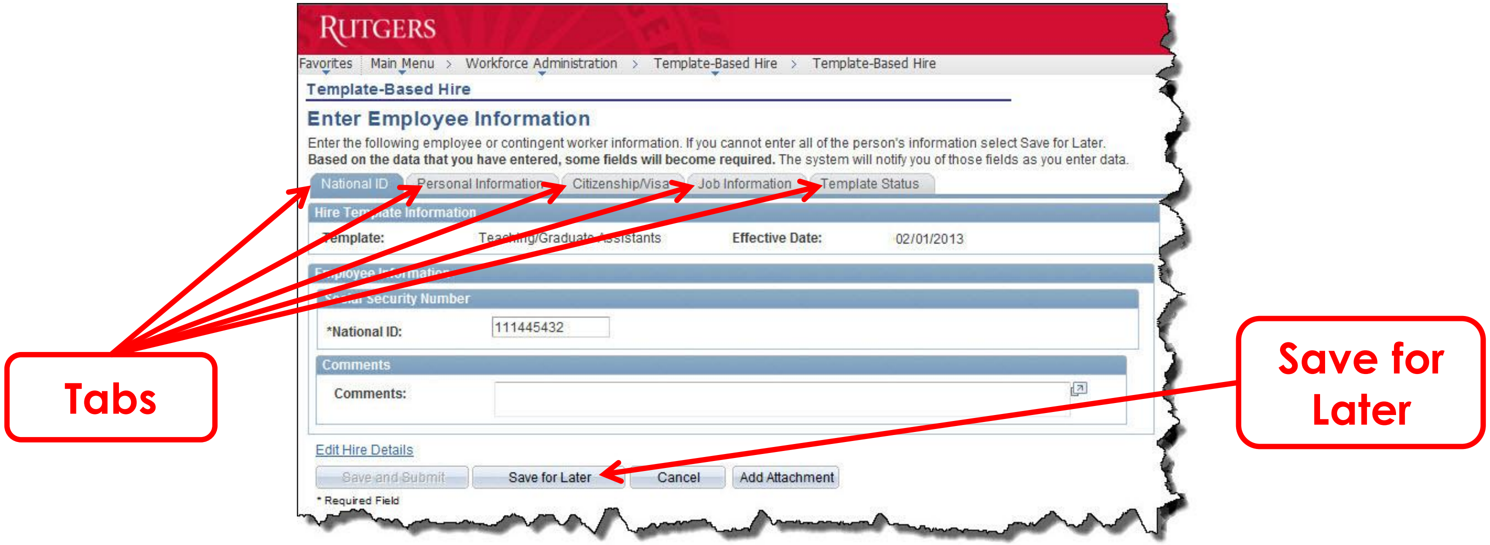


Template Selected

Effective Date Entered

Enter Employee Information
(continued)

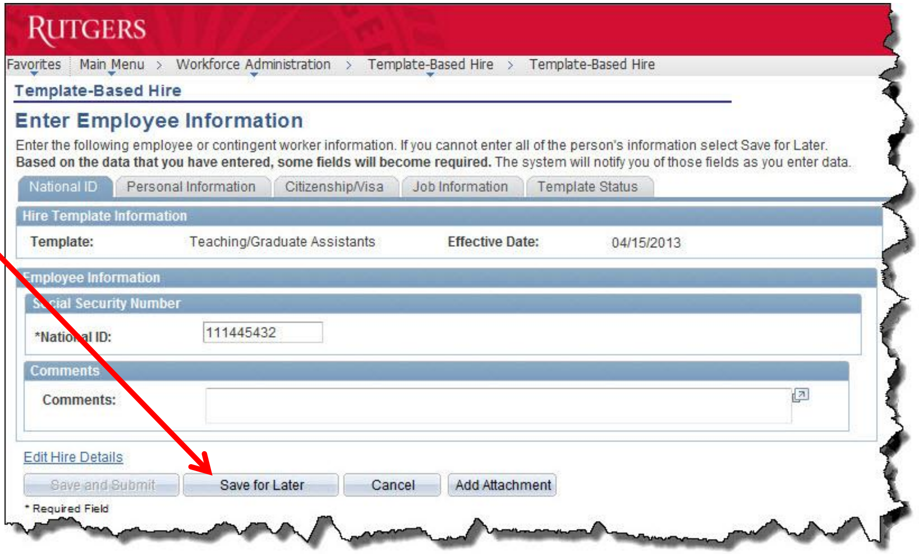
Tabs appear at the top of the screen. Work in order from the left tab to the right, working from top to bottom on each tab, and enter the required information into each tab. If you do not have all of the information needed to complete the TBH, click on the "**Save for Later**" button and return to it when you do.



Using “Save for Later”

If you do not have all of the required information or need to stop working on a TBH for any reason, you can use the “**Save for Later**” feature to capture the data you already entered. Click on the “**Save for Later**” button that appears at the bottom of each tab of the “**Employee Information**” screens.

Save for Later Button



Returning to Complete a Saved TBH

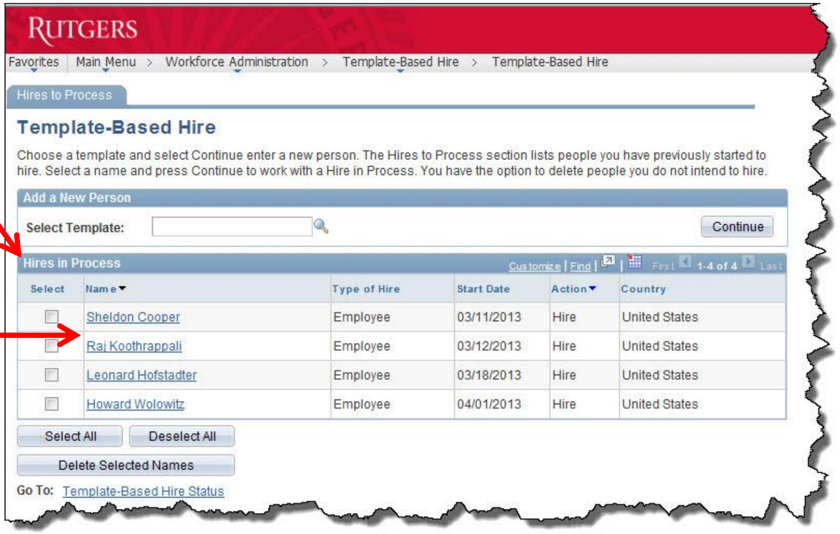
To return to a saved TBH to complete it, navigate to:

Workforce Administration > Template-Based Hire > Template-Based Hire

1. Locate the employee's name in the "**Hires in Process**" area of the screen.
2. Click on the link in the "**Name**" column.

Hires in Process Area

Links in Name Column



Returning to Complete a Saved TBH
(continued)

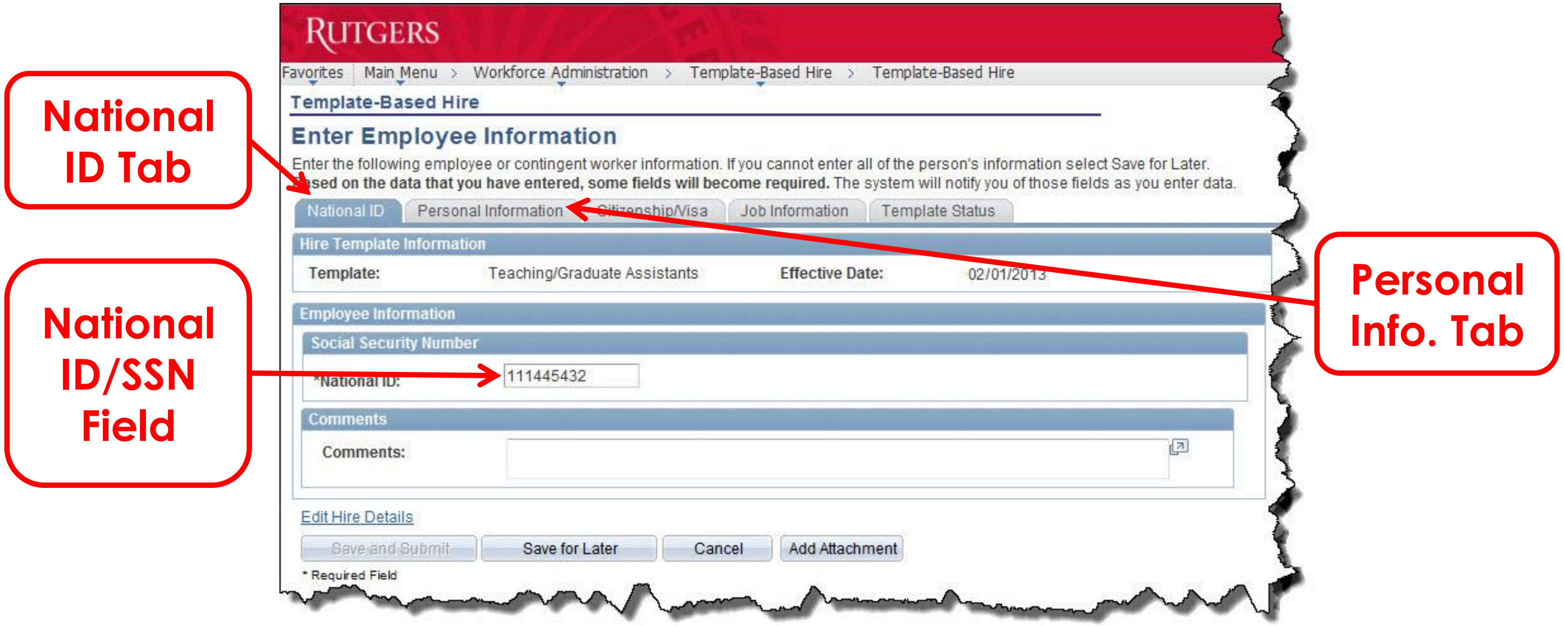
4. On the "**Enter Hire Details**" screen, click on the "**Continue**" button.

5. Once in the TBH for the employee you selected, enter the rest of the data and then submit the TBH to the department's Approver for review and approval as usual.

Enter National ID (SSN)

1. Type the employee's Social Security Number (SSN) into the "**National ID**" field on the "**National ID**" tab.

2. Click on the "**Personal Information**" tab.



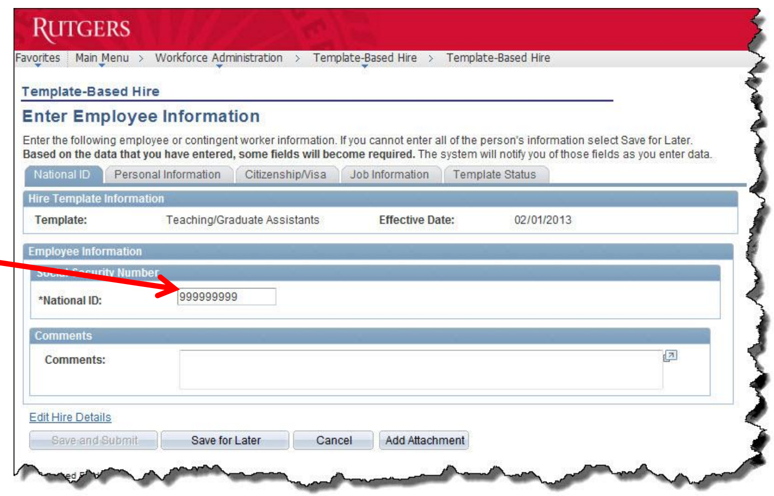
Note: See the next slide for additional information about Social Security Numbers.

Enter National ID (SSN)

(continued)

For tax purposes, every employee must have a Social Security Number in order to work at Rutgers. If the employee is <u>not</u> a US Citizen and does not have a SSN, then enter all 9's into the "**National ID**" field.

National ID Field – All 9's Entered for Non US Citizen without a SSN



<u>Note:</u> The employee must apply for a SSN before hire and show the Social Security Administrations confirmation receipt to the Preparer. Hire requests cannot be submitted without a SSN or a confirmation receipt.

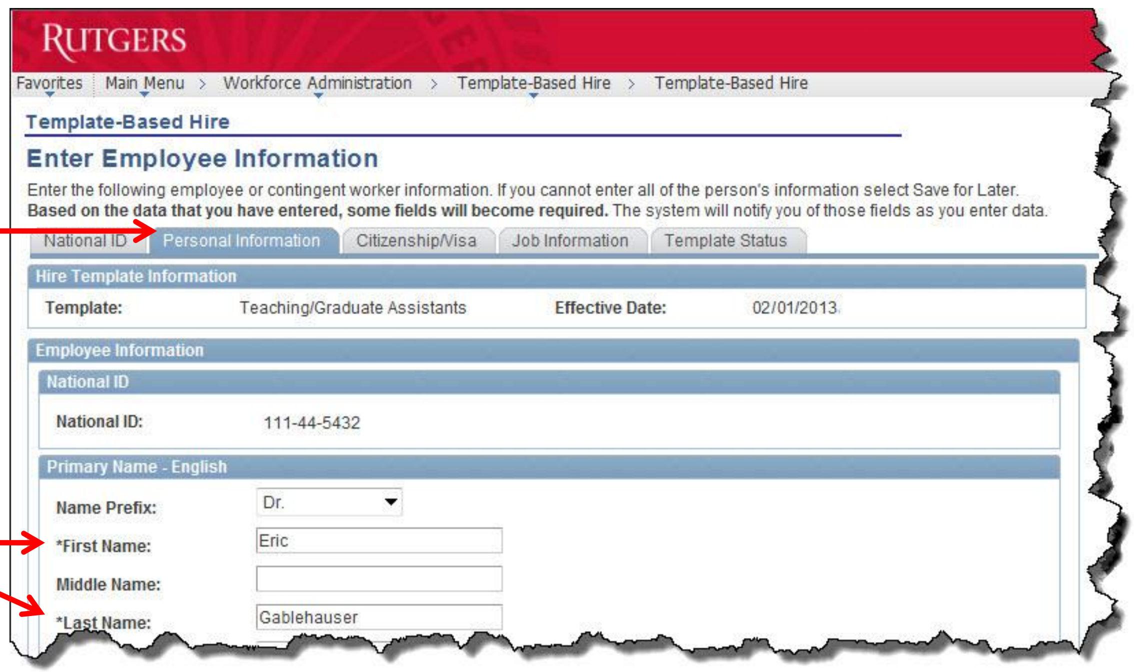
Enter Personal Information

Enter data on the "**Personal Information**" tab.

1. Type or select data to populate the fields. Fields marked with an asterisk (*****) are required and must be completed in order to move to the next tab.

Personal Information Tab

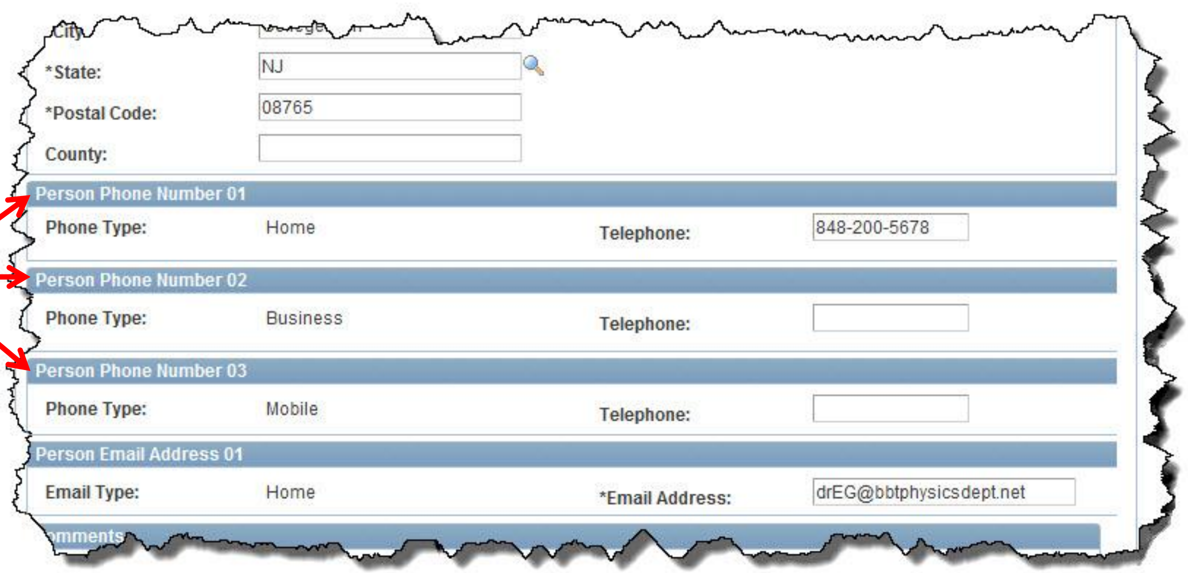
Required Fields



Enter Personal Information
(continued)

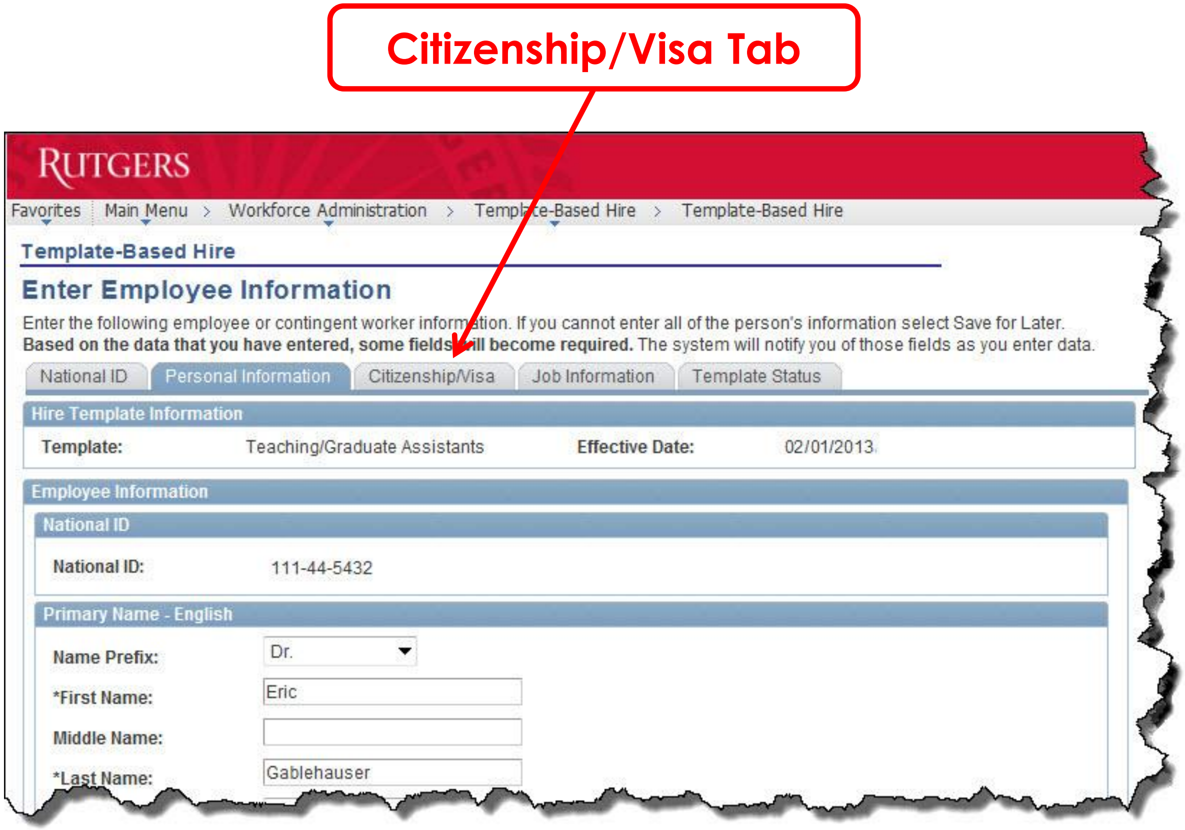
2. Enter at least one phone number into one of the three "**Person Phone Number**" fields, even though none of the fields are marked with an asterisk.

Person Phone Number Fields



Enter Personal Information
(continued)

3. When finished, click on the "**Citizenship/Visa**" tab.

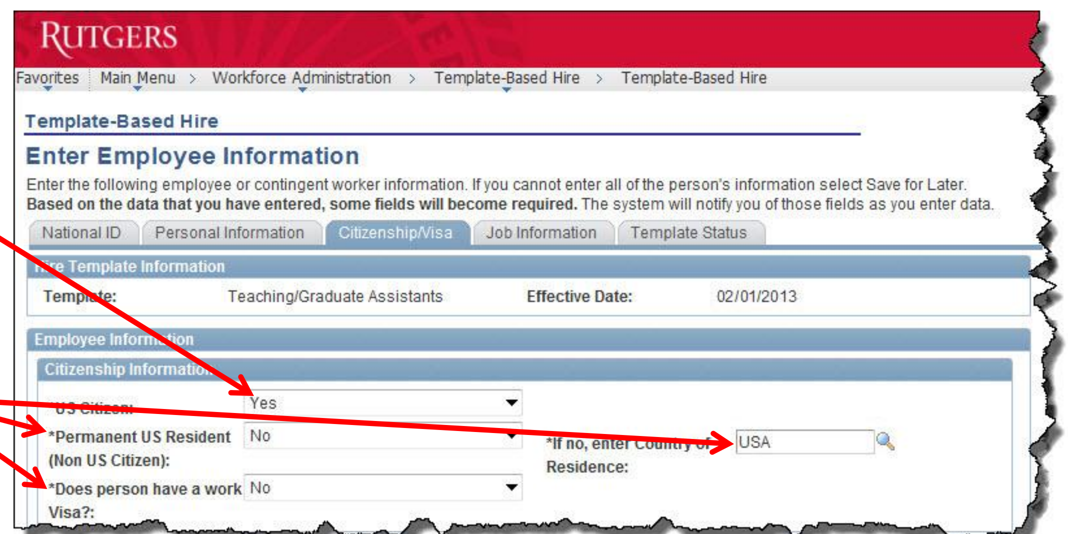


Enter Citizenship/Visa Information

1. Click on the "▼" icon next to the "**US Citizen**" field in the "**Citizenship Information**" section.
2. Is employee a US Citizen?
   A. If so, select "**Yes**" from the list. The system will populate the remaining Citizenship Information fields (e.g., Country of Residence) automatically.

US Citizen = Yes

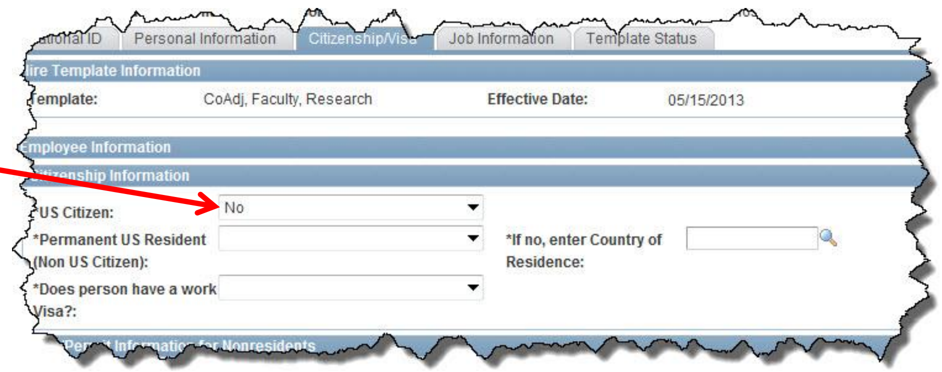
System Populated Fields



Enter Citizenship/Visa Information
(continued)

B. If not, select “**No**” from the list.

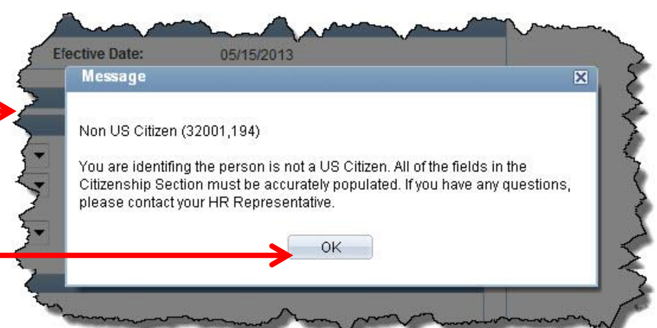
US Citizen = No



The “**Non US Citizen**” message will appear. Click on the “**OK**” button.

Non US Citizen Message

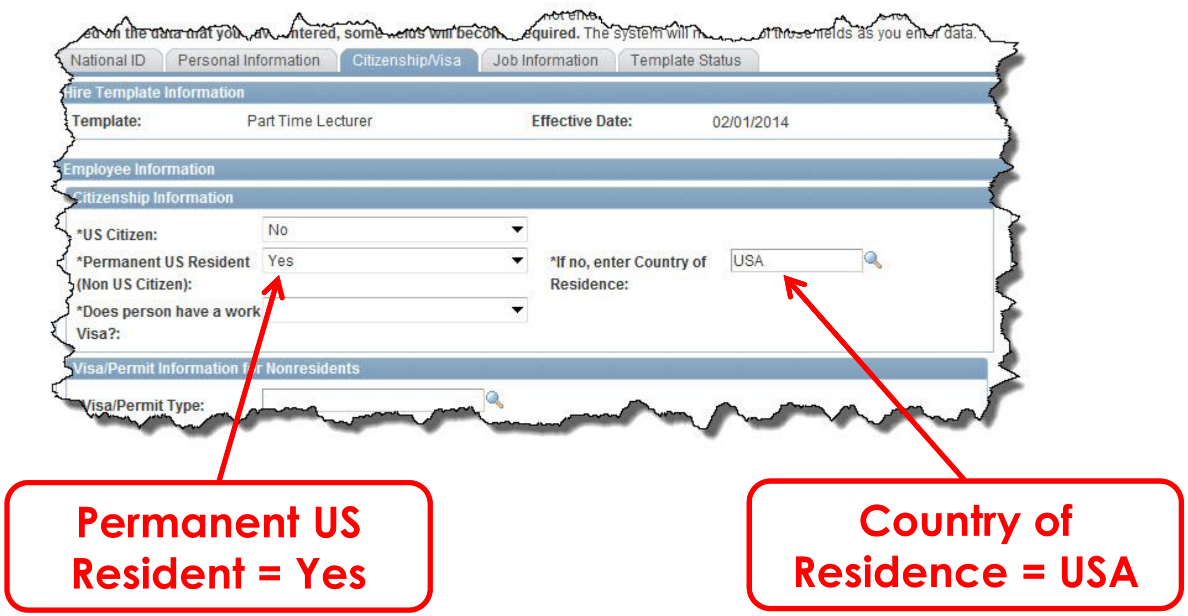
OK Button



Enter Citizenship/Visa Information

(continued)

C. If the employee is <u>not</u> a US citizen, but <u>is</u> a permanent resident of the US, select "**Yes**" from the "**Permanent US Resident**" drop-down list. The "**Country of Residence**" field will default to "**USA**" automatically.



Enter Citizenship/Visa Information

(continued)

D. Select "**No**" from the drop-down list next to the "**Does person have a work Visa?**" field.

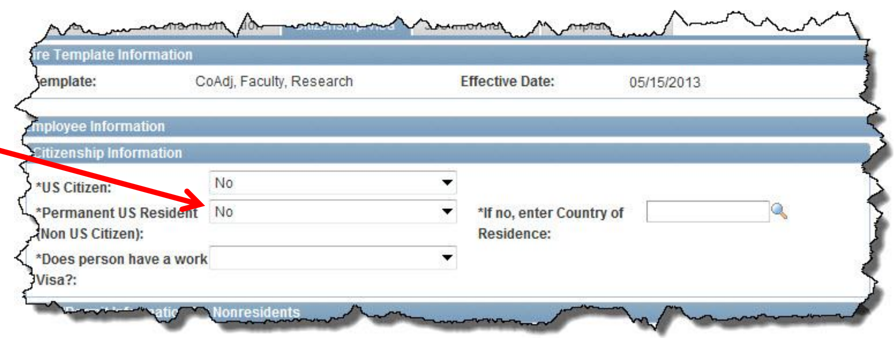
Does person have a work VISA? = No

Enter Citizenship/Visa Information

(continued)

E. If the employee is not a US citizen and is not a permanent resident of the US, select "**No**" from the "**Permanent US Resident**" list.

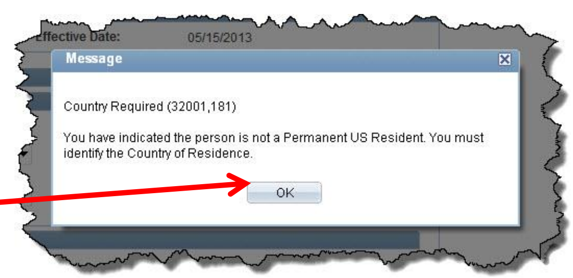
Permanent US Resident = No



F. The "**Country Required**" message will appear. Click on the "**OK**" button to dismiss it.

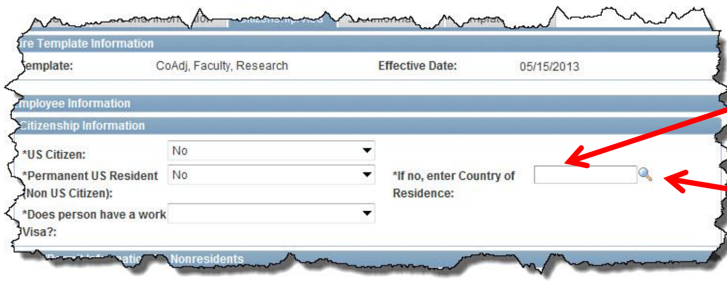
Country Required Message

OK Button



Enter Citizenship/Visa Information
(continued)

G. Click on the “🔍” icon next to the “**Country of Residence**” field.

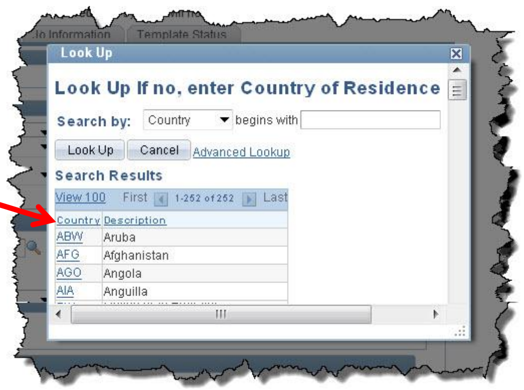


Country of Residence Field

Icon

H. Scroll through the list in the “**Look Up**” window and click on a link in the “**Country**” column to select it.

Look Up Window - Country Column and Links



Enter Citizenship/Visa Information
(continued)

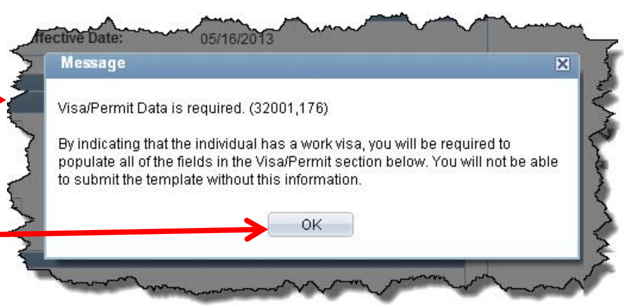
I. If the person has a work visa or permit, select "**Yes**" from the drop-down list in the "**Does person have a work Visa?**" field.

Does person have a work Visa? = Yes

J. The "**Visa/Permit Data is required**" message will appear. Click on the "**OK**" button to dismiss it.

Visa/Permit Data Required Message

OK Button



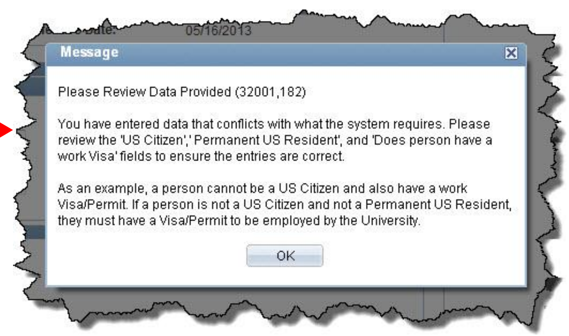
Enter Citizenship/Visa Information
(continued)

K. If the person does not have a work visa or permit, select "**No**" from the drop-down list in the "**Does person have a work Visa?**" field.

Does person have a work Visa? = No

L. The "**Please Review Data Provided**" message will appear.

Please Review Data Provided Message



Enter Citizenship/Visa Information

(continued)

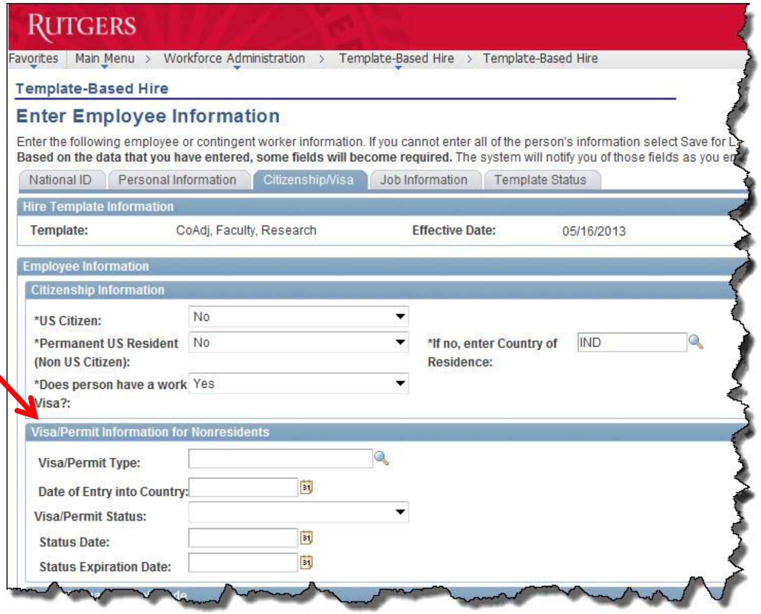
M. Click on the "**OK**" button to dismiss the message and review your entries to make sure they are accurate.

<u>Note:</u> If the person is not a US Citizen or Permanent US Resident and does not have a work visa or permit, then he/she cannot work at Rutgers. You cannot proceed with the TBH and will need to contact the hiring authority to inform them of this.

Enter Citizenship/Visa Information
(continued)

N. If the person has a work visa or permit and you selected "**Yes**" in the "**Does person have a work Visa?**" field (see step 2 I for details), then you must complete <u>all</u> fields in the "**Visa/Permit Information for Nonresidents**" section.

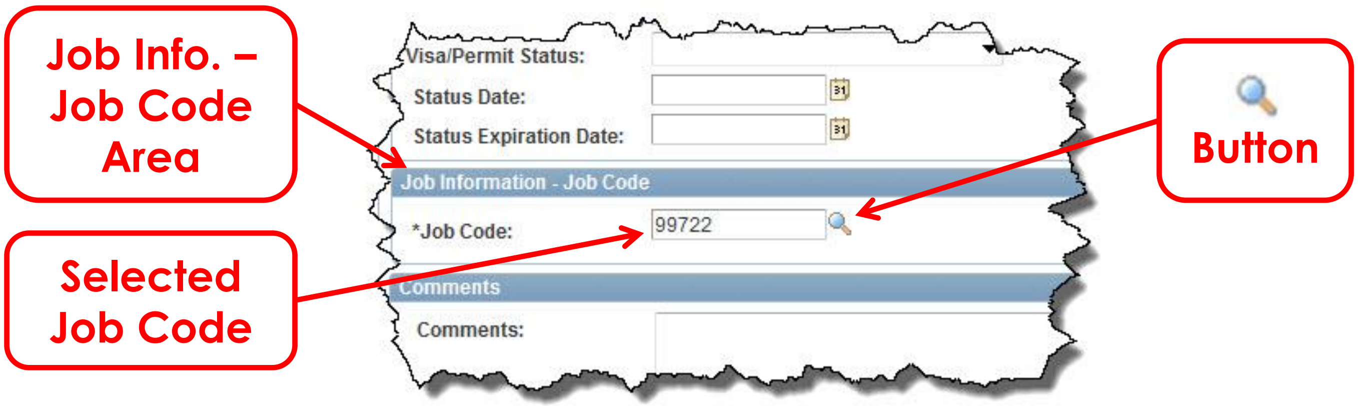
Visa/Permit Information for Nonresidents Sections



Enter Citizenship/Visa Information

(continued)

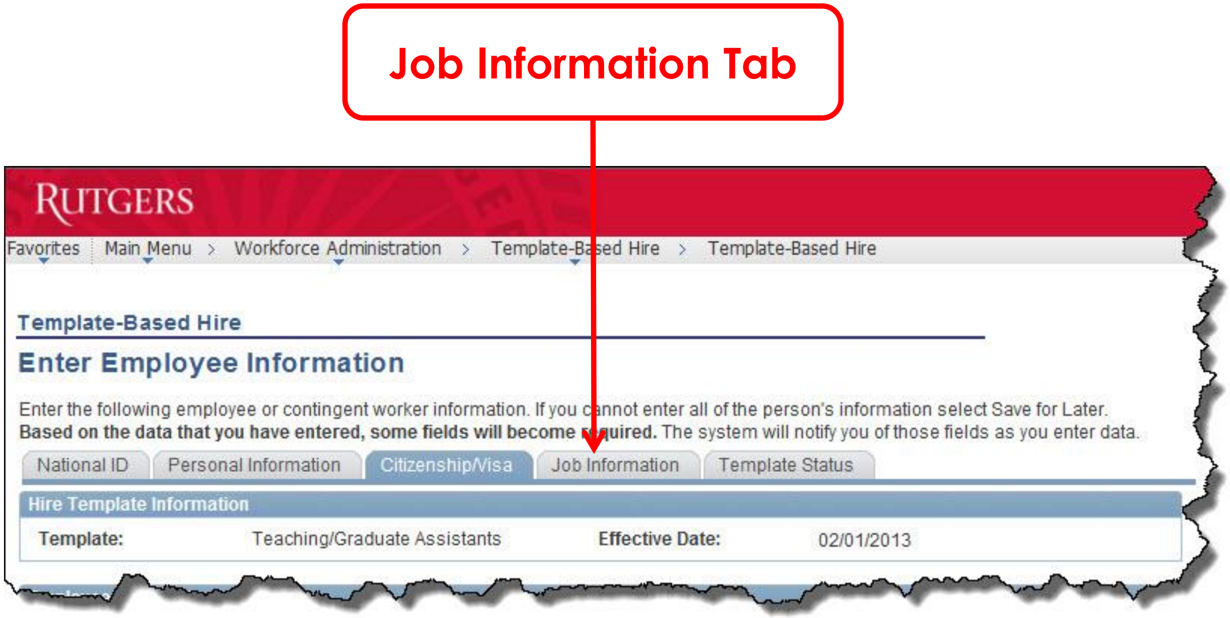
3. When finished entering data in the Citizenship/Visa information areas, click on the “ ” in the “**Job Information – Job Code**” area to access the list of available job codes.
4. Click on the code that matches the one specified in the Offer Letter to select it.



__Note:__ **The list of available Job Codes differs based on the template selected.**

Enter Citizenship/Visa Information
(continued)

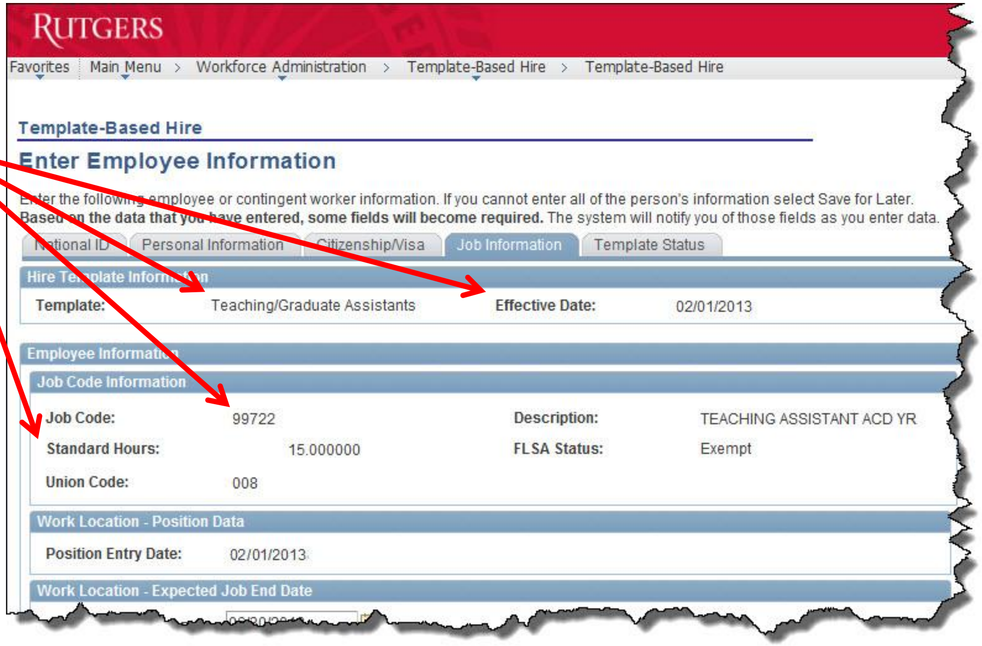
5. Click on the "**Job Information**" tab to proceed to the next section.



Enter Job Information

1. Enter data. Some fields (e.g., Description, FLSA Status, Union Code, etc.) are populated by the system based on the template used and the Job Code selected on the previous screen.

Examples of Auto-Populated Fields



<u>Note:</u> See next slide for important information about Standard Hours.

Enter Job Information

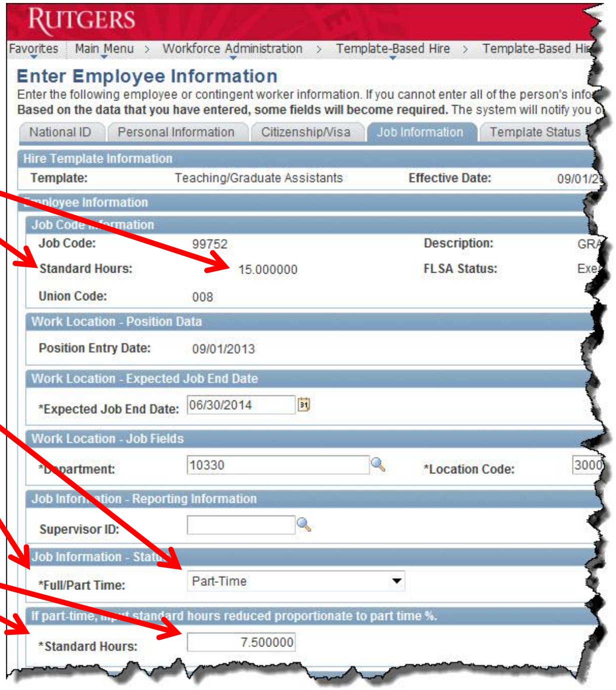
(continued)

The full-time standard hours for the position always display at the top of the screen. If the employee will be part-time, select "**Part-Time**" from the "***Full/Part Time**" field, then enter the reduced hours into the "***Standard Hours**" field.

Default Standard Hours for Full-Time Position

***Full/Part Time Field with Part-Time Selected**

***Standard Hours Field with Number of Hours Employee will Work Entered**

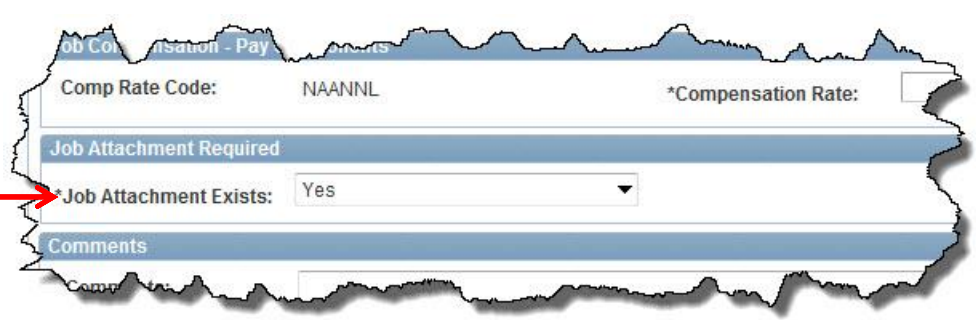


Enter Job Information
(continued)

2. If you do not have a copy of the Offer Letter, click on the "▼" next to the "**Job Attachment Exists**" field and select "**No**" from the list. Then, click on the "**Save for Later**" button.

   If you have the Offer Letter, select "**Yes**" and click on the "**Add Attachment**" button.

Job Attachment Exists Field



Save for Later Button

Add Attachment Button

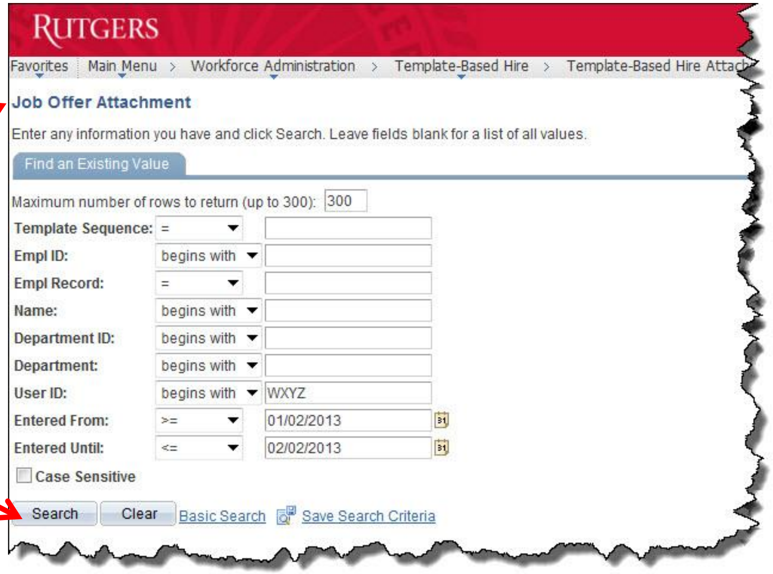
Attach Offer Letter

After you click on the "**Add Attachment**" button, a "**Job Offer Attachment**" window will open in front of the TBH "**Employee Information**" screen.

1. Click on the "**Search**" button to see the hires you entered recently.

Job Offer Attachment Window

Search Button

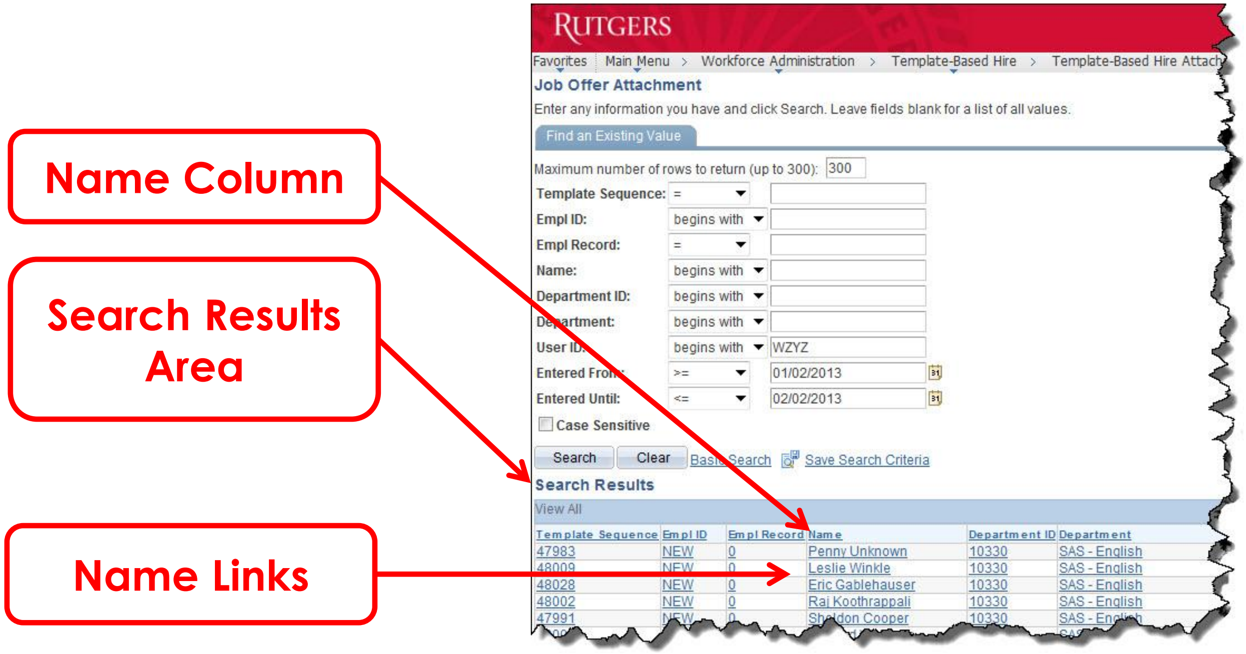


<u>Note:</u> The dates in the "Entered From" and "Entered Until" default to the past month. You can change the dates if necessary.

Attach Offer Letter

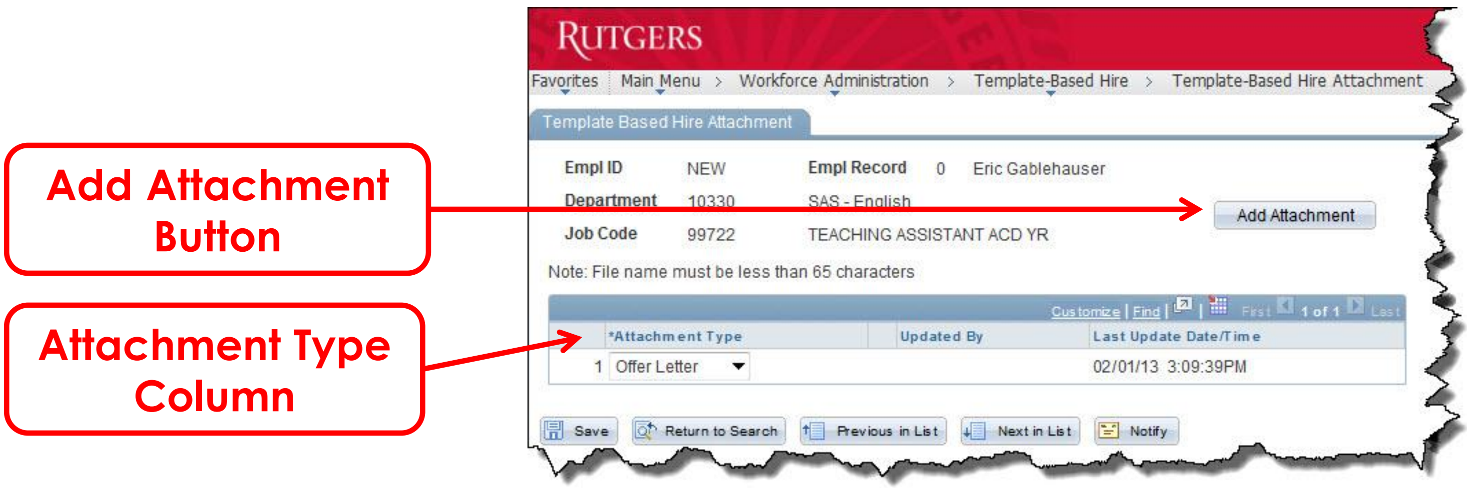
(continued)

2. The TBH transactions you entered within the date range specified will display in the "**Search Results**" area. Locate the employee in results area and click on the link in the "**Name**" column.



Attach Offer Letter
(continued)

3. On the “**Template-Base Hire Attachment**” screen, click on the “ ” in the “**Attachment Type**” column and select “**Offer Letter**” if it does not appear.
4. Then, click on the “**Add Attachment**” button.



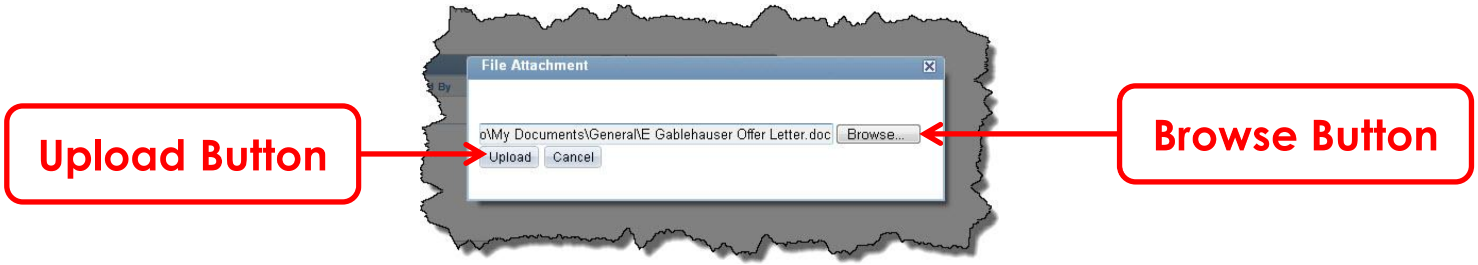
<u>Note:</u> “Offer Letter” must appear in the “Attachment Type” field. You will not be able to submit the request if it does not.

Attach Offer Letter

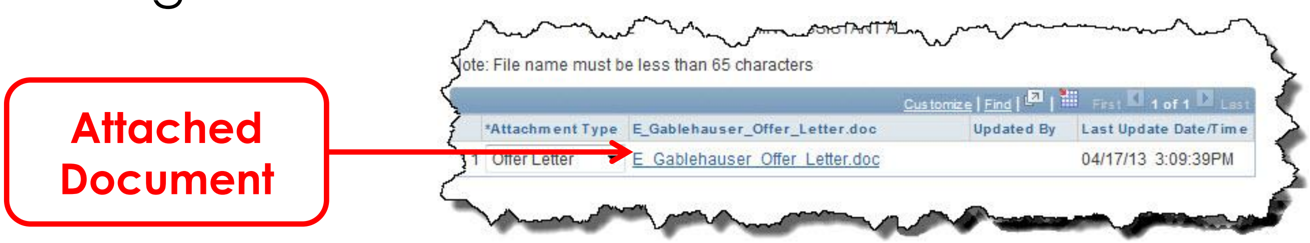
(continued)

5. Click on the "**Browse**" button on the "File Attachment" window, locate the Offer Letter on your computer and click on the file name to select it.

6. Then, click on the "**Upload**" button.



7. Confirm the correct document was uploaded by looking at the name of the file on the screen.

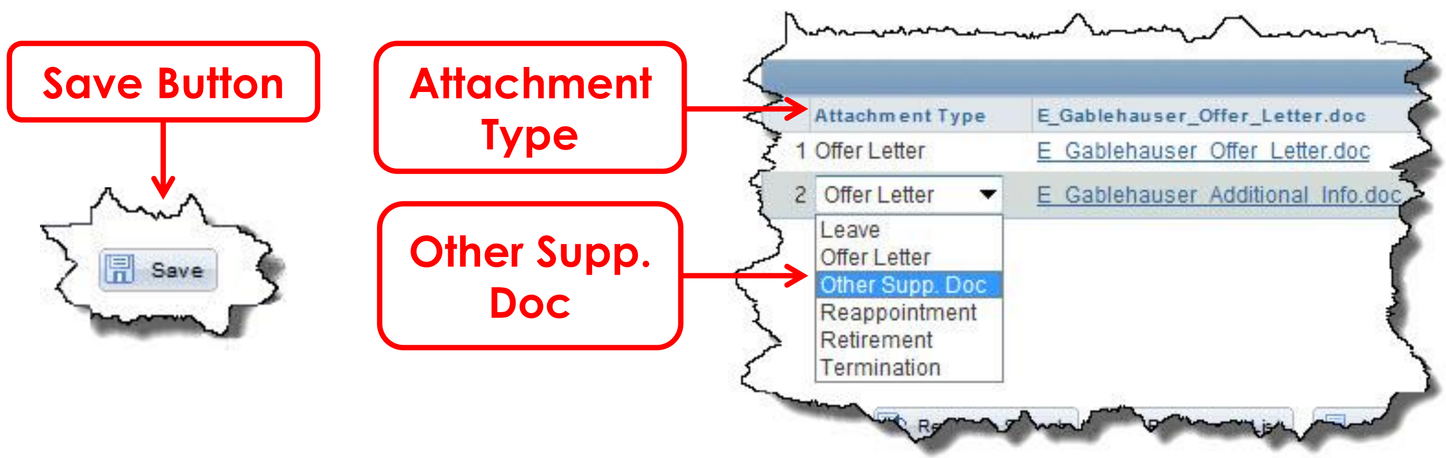


Attach Offer Letter

(continued)

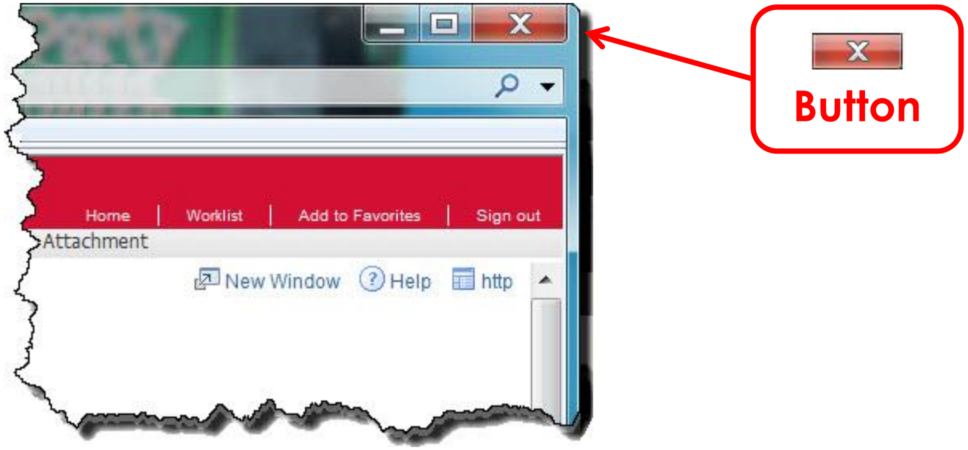
8. Click on the "**Save**" button.

   If you have additional documents to upload, click on the "**Add Attachment**" button again, and repeat steps 5 through 7. Select "**Other Supp. Doc**" from the "**Attachment Type**" drop-down list, then click on "**Save**" again. Repeat as many times as needed.



Attach Offer Letter
(continued)

9. Click on the "" button in the top right corner of the "**Template Based Hire Attachment**" window to close it. After it is closed you will see the "**Job Information**" tab of the Template-Based Hire "**Employee Information**" screen.



<u>Note:</u> Make sure you only close the attachment window. Do not close the Template-Based Hire screen with the "Employee Information" tabs.

Attachment File Names

When creating file names, please keep in mind other people need to access the attachment so the name should reflect the type of document it is and what it is for. The following file name guidelines should be followed:

1. It should be a PDF so other people cannot change it.

   Note: The file extension must be lower case (pdf not PDF) due to a known problem with upper case extensions.

2. The file name should be shorter than 40 characters.
3. The employee's last name should be included.
4. Including the effective date is helpful.
5. If revised, the name should reflect it (e.g., include "rev" at the end).

Attachment File Names
(continued)

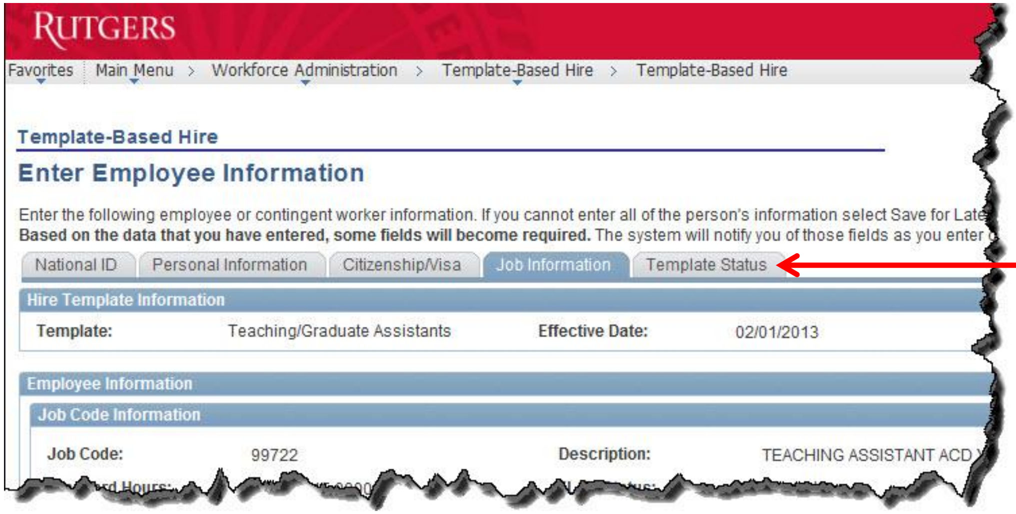
The following are examples of well-named Offer Letters:

- Sheldon Cooper_Offer Ltr_05 02 13.pdf
- LeonardHofstadter_offer_050213.pdf
- H_Wolowitz_offer_revised 5 2 13.pdf
- Koothrappali R_offer ltr 5 2 13_rev.pdf
- Revised Leslie Winkle Offer 5 2 13.pdf
- Offer Letter_A Fowler_May 2 13.pdf
- B Rostenkowski offer May 2 2013.pdf
- Cooper_S offr ltr 050213 rev2.pdf

Change Template Status

You are ready to complete the last step in the process to submit the TBH for review by the department Approver.

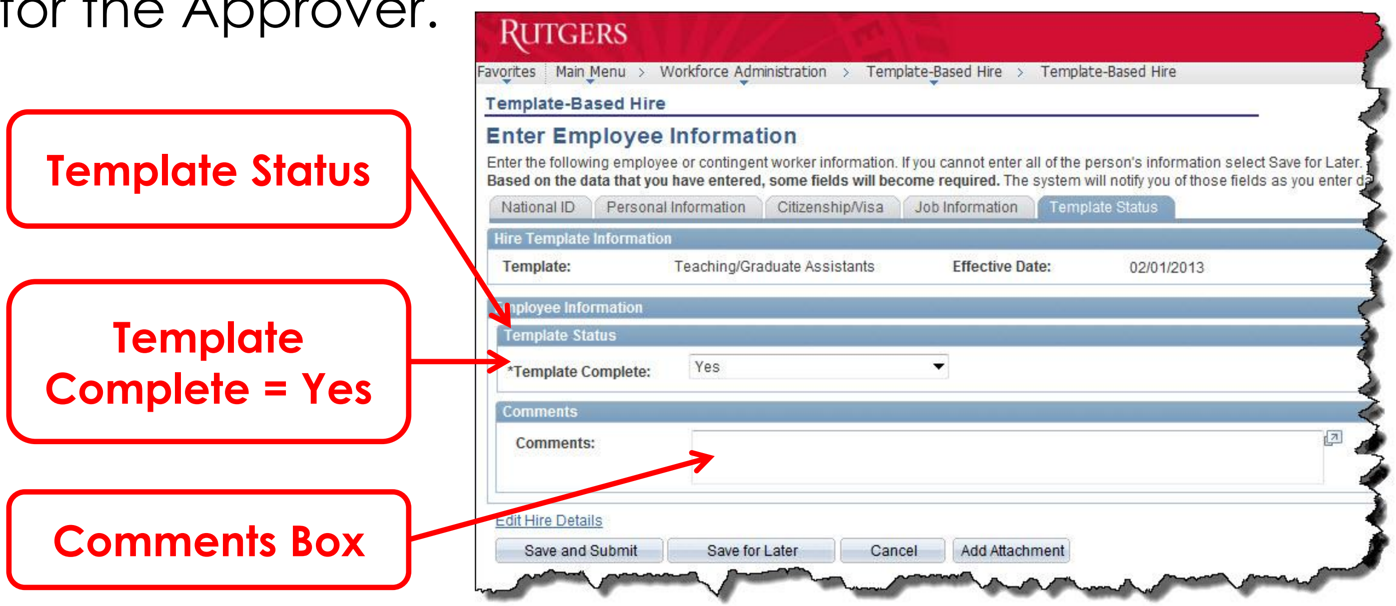
1. Click on the “**Template Status**” tab.



Template Status Tab
(continued)

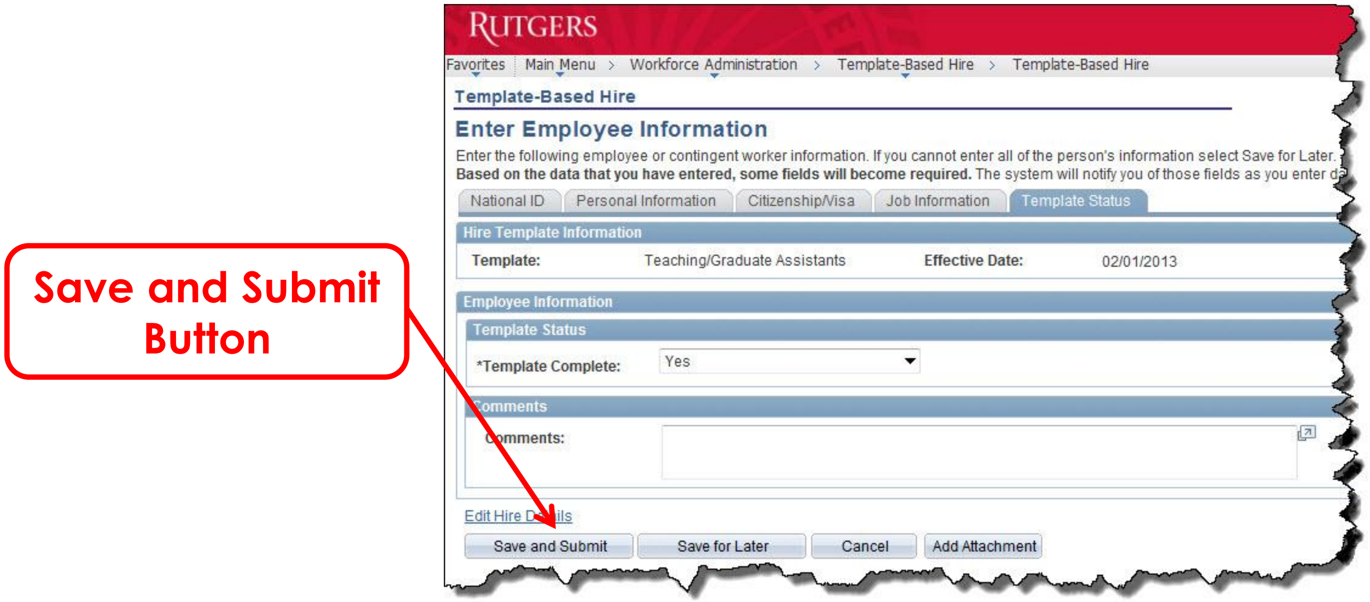
2. Click on the “ ” in the “**Template Complete**” field in the “**Template Status**” area and select “**Yes**” from the list. This activates the “Save and Submit” button.

3. If needed, click in “**Comments**” box and type notes for the Approver.



Template Status Tab
(continued)

4. Click on the "**Save and Submit**" button to send the transaction to the Approver for review.



Note: **Once you click on "Save and Submit" you cannot make changes unless the Approver routes the TBH back to you for corrections. Therefore, you may want to compare your entries to the information in the Offer Letter before you click on the "Save and Submit" button.**

Confirmation Screen

After you submit the transaction for review, you will see a "**Submit Confirmation**" screen indicating the TBH was sent to the Approver for review. At this point your work for this TBH is complete unless the Approver sends the TBH back to you for changes. Click on the "**OK**" button to exit the transaction and return to the TBH "**Hires to Process**" screen.

From here you can process other hires, move to another transaction, or sign out of the system.

Email and Routing to Department Approver

The system generates an email and sends it to the Approver. You, the Preparer, are copied on the message. At this point the transaction is ready for the Department Approver. The Approver must review and approve the TBH to route it to the HCM Unit, ALR, or the database for actual processing.

To: Approver
Cc: Preparer

To: Toby Approver
Cc: Siri Preparer
Subject: Eric Gablehauser has been submitted for HIR into your department (10330).

Hi Toby,

Eric Gablehauser has been submitted for hire (Action: HIR) into your department.

SeqNum: 48001
Status: PEND
Action: HIR

Click on the link below to review the request. If the link doesn't work for you, you can copy and paste the URL into your browser.

https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/RU_CUSTOM_MENU.RU_HR_TBH_DEPT_APV.GBL?Page=RU_TBH_PEND_LIST&Action=U

If you are in the application, you can navigate to the page using the following navigation:

Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

Thank you,
University Human Resources

RUTGERS
THE STATE UNIVERSITY OF NEW JERSEY

Instructions for Approvers and Preparers

(Review, Correction and Approval)

Review and Approval Email

After the Preparer submits the TBH, the system sends an email to the Approver. The Preparer is copied on the message. To access the transaction, the Department Approver clicks on the link in the email or navigates to the HCM "**Department Hire Approval**" screen using the path provided.

To: Approver

Cc: Preparer

Link

Navigation = Workforce Administration > Template-Based Hire > Department Hire Approval

To: Toby Approver
Cc: Siri Preparer
Subject: Eric Gablehauser has been submitted for HIR into your department (10330).

Hi Toby,

Eric Gablehauser has been submitted for hire (Action: HIR) into your department.

SeqNum: 48001
Status: PEND
Action: HIR

Click on the link below to review the request. If the link doesn't work for you, you can copy and paste the URL into your browser.

https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/RU_CUSTOM_MENU.RU_HR_TBH_DEPT_APV.GBL?Page=RU_TBH_PEND_LIST&Action=U

If you are in the application, you can navigate to the page using the following navigation:

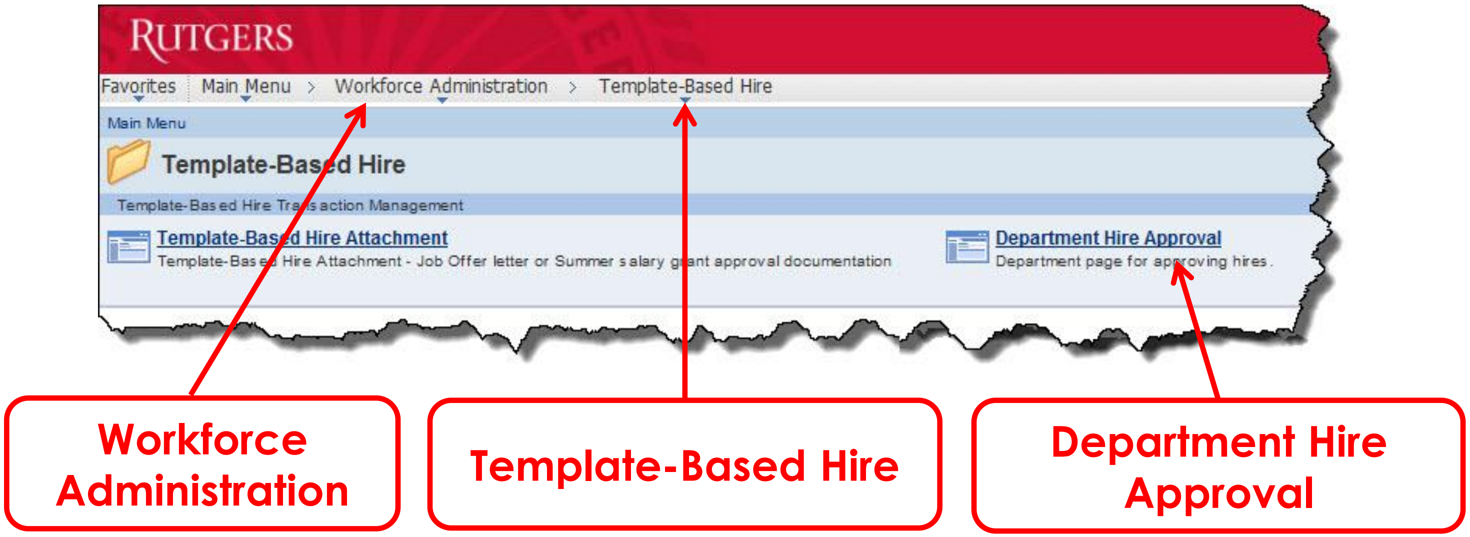
Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

Thank you,
University Human Resources

Workforce Administration Navigation

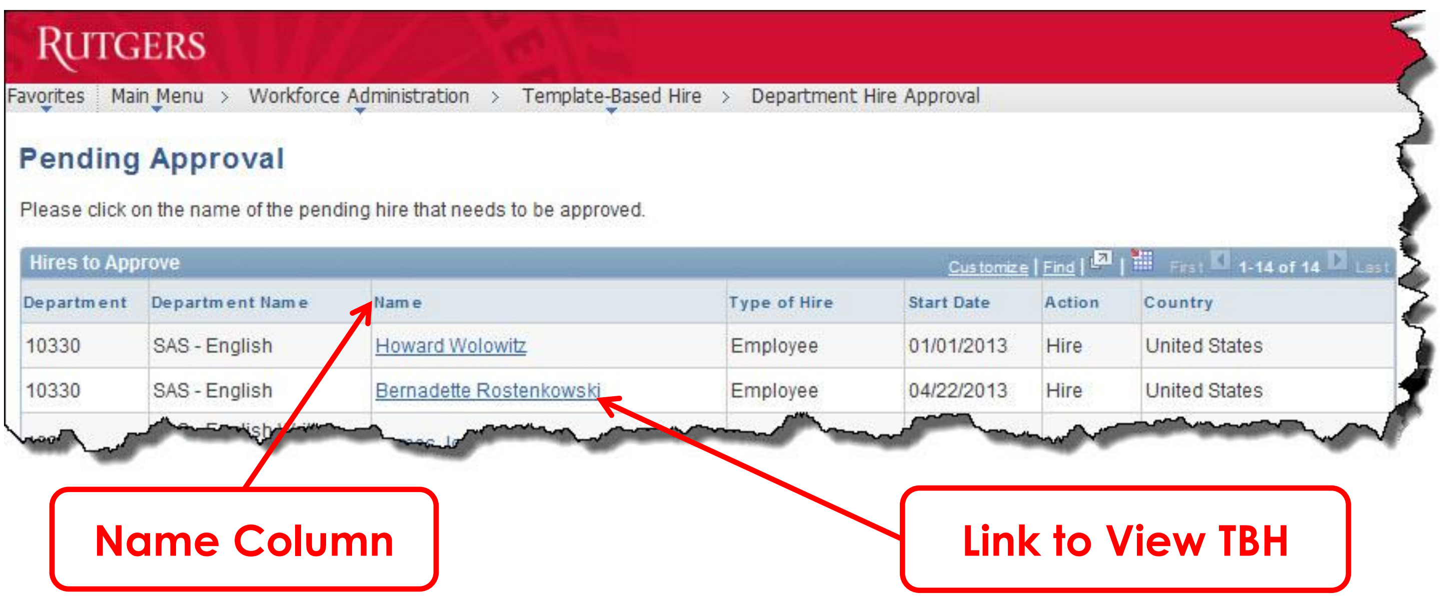
If the link in the email does not work, you can log into HCM and navigate to "**Workforce Administration**" using one of the navigation methods described earlier.

From the Workforce Administration menu, navigate to the "**Template-Based Hire**" and click on "**Department Hire Approval**".



Workforce Administration Navigation
(continued)

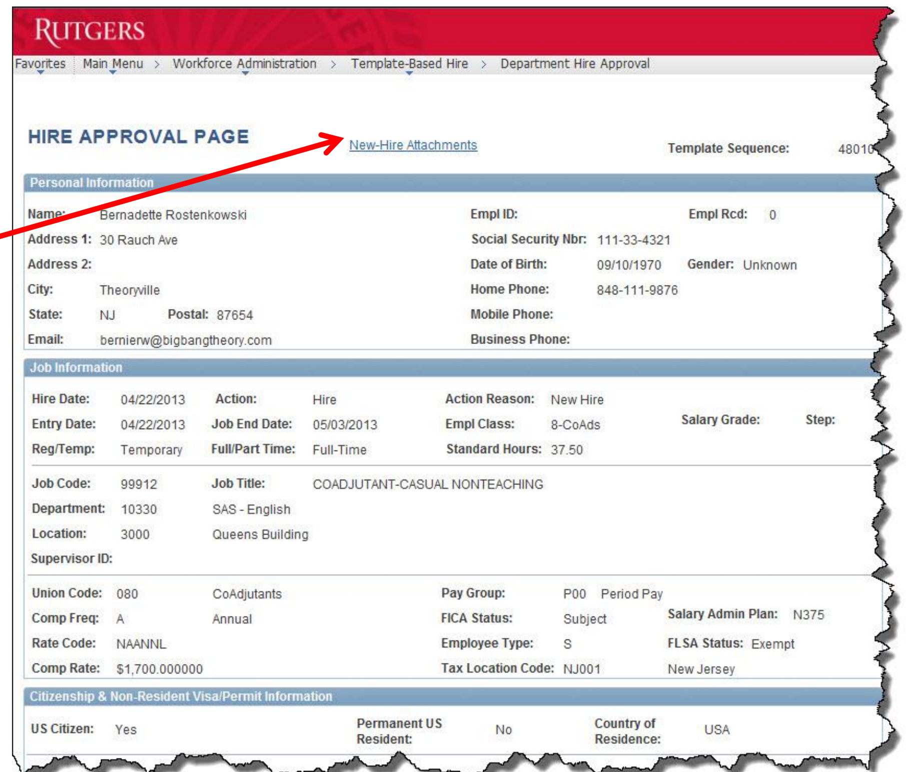
The "**Pending Approval**" screen displays a list of hire transactions that you need to review and approve. Locate the one you want to view in the list, then click on the link in the "**Name**" column to open it.



Dept. Approver - Review and Approval

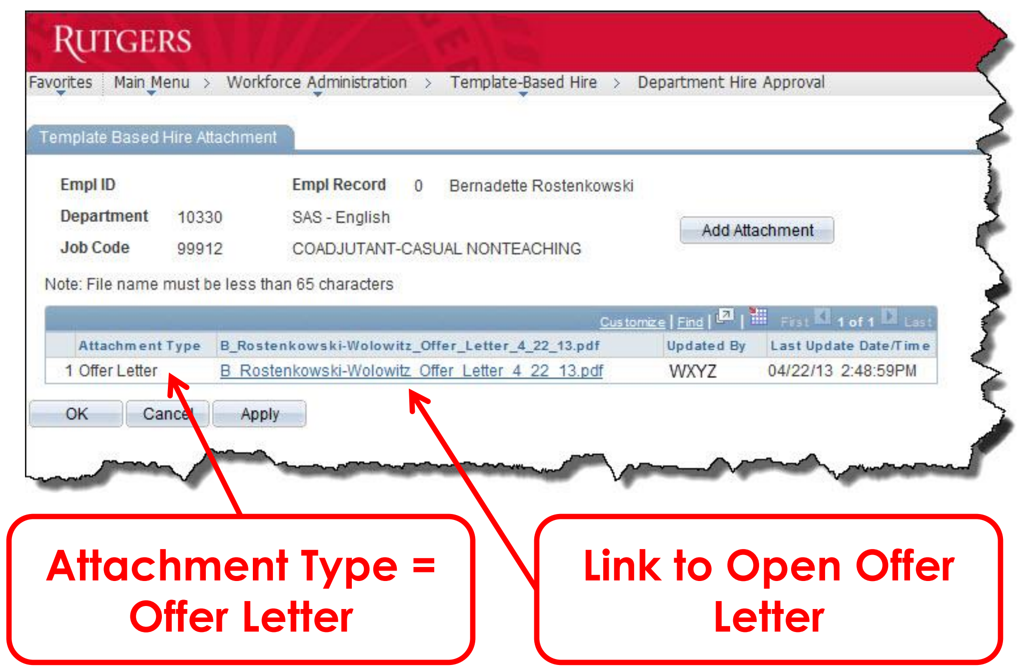
1. Click on the "**New Hire Attachments**" link on the "**Hire Approval Page**" to open the Offer Letter and any other attached documents.

New Hire Attachments Link



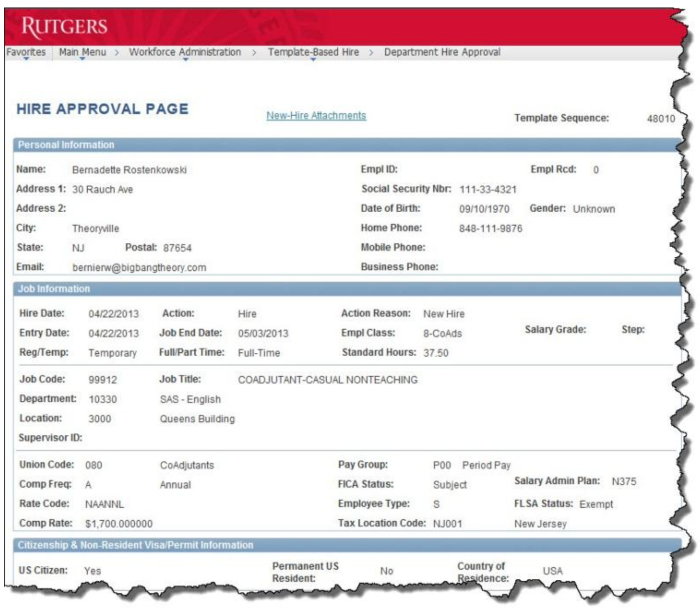
Dept. Approver - Review and Approval
(continued)

2. Click on the link to the right of "**Offer Letter**" in the "**Attachment Type**" area. The document will open in a new window. Repeat this step as many times as need to open other attachments.



Dept. Approver - Review and Approval
(continued)

3. Compare the information in the Offer Letter to the data the Preparer that appears on the "**Hire Approval Page**".


RUTGERS
Favorites | Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

HIRE APPROVAL PAGE — New-Hire Attachments — Template Sequence: 48010

Personal Information

Name: Bernadette Rostenkowski
Address 1: 30 Rauch Ave
Address 2:
City: Theoryville
State: NJ Postal: 87654
Email: bernierw@bigbangtheory.com
Empl ID:
Empl Rcd: 0
Social Security Nbr: 111-33-4321
Date of Birth: 09/10/1970 Gender: Unknown
Home Phone: 848-111-9876
Mobile Phone:
Business Phone:

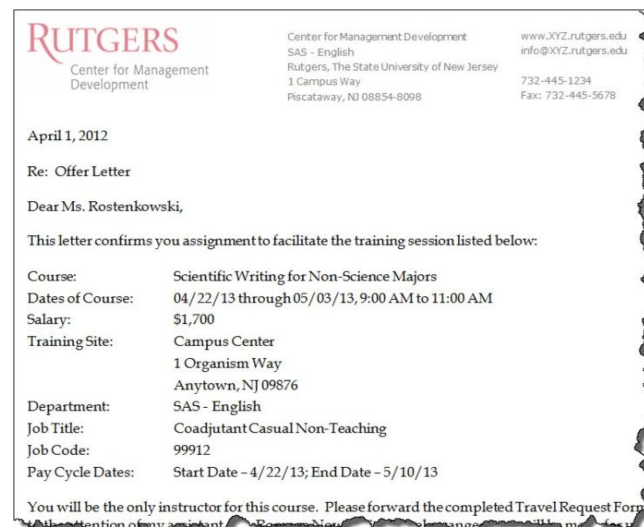
Job Information

Hire Date: 04/22/2013 Action: Hire Action Reason: New Hire
Entry Date: 04/22/2013 Job End Date: 05/03/2013 Empl Class: 8-CoAds Salary Grade: Step:
Reg/Temp: Temporary Full/Part Time: Full-Time Standard Hours: 37.50
Job Code: 99912 Job Title: COADJUTANT-CASUAL NONTEACHING
Department: 10330 SAS - English
Location: 3000 Queens Building
Supervisor ID:
Union Code: 080 CoAdjutants Pay Group: P00 Period Pay
Comp Freq: A Annual FICA Status: Subject Salary Admin Plan: N375
Rate Code: NAANNL Employee Type: S FLSA Status: Exempt
Comp Rate: $1,700.000000 Tax Location Code: NJ001 New Jersey

Citizenship & Non-Resident Visa/Permit Information

US Citizen: Yes Permanent US Resident: No Country of Residence: USA

Hire Approval Page


RUTGERS
Center for Management Development

Center for Management Development
SAS - English
Rutgers, The State University of New Jersey
1 Campus Way
Piscataway, NJ 08854-8098

www.XYZ.rutgers.edu
info@XYZ.rutgers.edu
732-445-1234
Fax: 732-445-5678

April 1, 2012

Re: Offer Letter

Dear Ms. Rostenkowski,

This letter confirms you assignment to facilitate the training session listed below:

Course: Scientific Writing for Non-Science Majors
Dates of Course: 04/22/13 through 05/03/13, 9:00 AM to 11:00 AM
Salary: $1,700
Training Site: Campus Center
1 Organism Way
Anytown, NJ 09876
Department: SAS - English
Job Title: Coadjutant Casual Non-Teaching
Job Code: 99912
Pay Cycle Dates: Start Date – 4/22/13; End Date – 5/10/13

You will be the only instructor for this course. Please forward the completed Travel Request Form

Opened Offer Letter

Dept. Approver - Review and Approval
(continued)

4. If the data is correct, click on the "**Approve**" button, to route the TBH to the next step for processing. (See Part I for details about workflows.)

   If any of the data is incorrect, you are required to type a note to the Preparer into the "**Comments**" box. When done, click on the "**Return to Dept Preparer**" button to send the TBH back to the Preparer for correction.

Dept. Approver - Review and Approval

(continued)

5. If you Approved the TBH, you will see the "**Hire Approved Confirmation**" screen.

If you returned the TBH to the Preparer, you will see the "**Hire Not Approved Confirmation**" screen.

6. Click on the "**OK**" button.

Not Approved Email

If you, the Approver, send the transaction back for changes, the system generates and sends an email to the Preparer indicating the hire was not approved. The comments you entered on the "**Hire Approval Page**" automatically appear in the body of the email.

"Hire – Not Approved"

Comments entered by the Approver in HCM display in the email.

From: noreply@rias.rutgers.edu [mailto:noreply@rias.rutgers.edu]
Sent: Wednesday, April 03, 2013 3:58 PM
To: Siri Preparer
Subject: Hire - Not Approved

Dear Siri Preparer,

The following hire transaction was not approved. Please review the comments, make necessary changes and re-submit for approval.

Name: Eric Gablehauser
Hire Date: 02/01/2013
Job Title: TEACHING ASSISTANT ACD YR
Department: 10330
Department Name: SAS - English

Comments:
Please change the salary to match the amount shown in the offer letter. Thanks, Toby.

https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).HR_TBH_JOB.GBL?Page=HR_TBH_LIST&Action=U

Thank You,
Toby Approver

Changes After Approver Review

If the Approver reviews the TBH, finds errors and does not approve the transaction, the system routes it back to the Preparer for corrections. The Preparer will receive an email indicating the hire was not approved. The email contains comments from the Approver and a link to access the transaction.

Hire Not Approved

Comments entered into TBH by the Approver display in the body of the email.

Link to TBH

From: noreply@rias.rutgers.edu [mailto:noreply@rias.rutgers.edu]
Sent: Wednesday, April 03, 2013 3:58 PM
To: Siri Preparer
Subject: Hire - Not Approved

Dear Siri Preparer,

The following hire transaction was not approved. Please review the comments, make necessary changes and re-submit for approval.

Name: Eric Gablehauser
Hire Date: 02/01/2013
Job Title: TEACHING ASSISTANT ACD YR
Department: 10330
Department Name: SAS - English

Comments:
Please change the salary to match the amount shown in the offer letter. Thanks, Toby.

https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).HR_TBH_JOB.GBL?Page=HR_TBH_LIST&Action=U

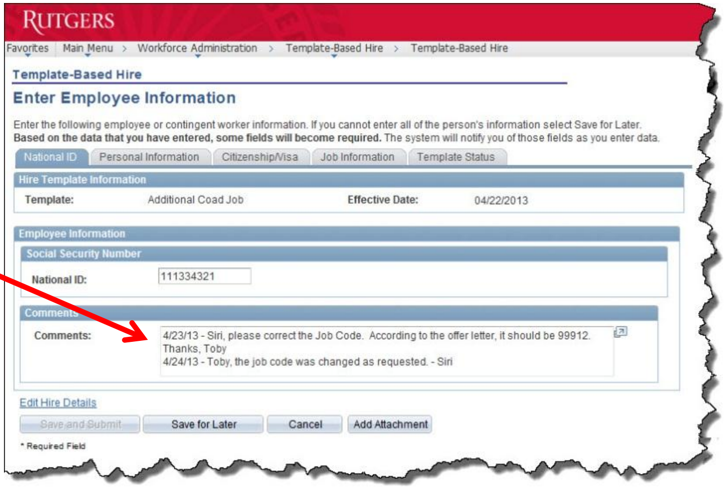
Thank You,
Toby Approver

Changes After Approver Review
(continued)

You (the Preparer) can access the TBH to make changes from the link in the email or from the "**Hires in Process**" screen. (See Instructions for Preparer section for details.)

1. Open the TBH and make the required changes.
2. When done, type a note for the Approver into the "**Comments**" box indicating the changes were made.

Comments entered Approver and Preparer about changes.



Changes After Approver Review

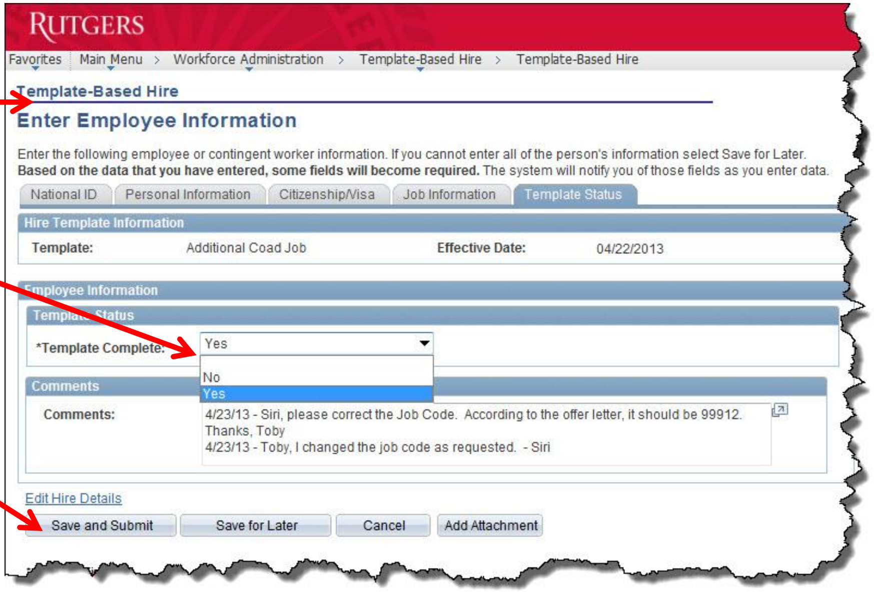
(continued)

3. Click on the "**Template Status**" tab. You must reset the "**Template Complete**" status. To do this, click on the blank area in the drop-down list. This activates the "**Save and Submit**" button so you can send the TBH back to the Approver for review.

Template Status Tab

Blank Area

Active Save and Submit Button



Changes After Approver Review
(continued)

The system generates and sends another email message to the Department Approver indicating the TBH is ready for review. The Approver and Preparer repeat the review and correction process until the hire transaction is correct and approved.

Approver Submission

After the Department Approver approves the TBH, the system routes the request to the database, the UHR HCM unit or ALR for processing.

All TBH requests are now submitted for processing by the Department Approver (not the Preparer). Employees cannot be activated in the HCM/Payroll system or subsidiary systems without the Department Approver's approval.

Processed Transaction

Once the TBH is approved, the system generates and sends the request to the database, the UHR HCM unit or ALR for processing. After it is processed, the system sends a final email to the Approver indicating the **"Job…has been processed"** or the "**Job and Contract…has been processed**". This signifies the end of the Template-Based Hire process.

Job and Contract Processed

To: Tory Approver
Cc: HCM Manager; Siri Preparer
Subject: Job and Contract for Bernadette Rostenkowski, 00047618-0 has been processed

Dear Tory Approver

The job and contract for Bernadette Rostenkowski, 00047618-0 has been processed. The Contract starts on 2013-04-22 and ends on 2013-05-03. Please proceed to the Department Budget table to setup the assignment level charging instructions, if applicable.

If you wish to view job information again, you can access the job and contract summary screen through this link:

https://ptest1-riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).JOB_DATA.GBL?Page=RU_CURR_JOB_SUMM&Action=C&EMPLID=00047618&EMPL_RCD=0

Thank you,
University Human Resources

FYI

Automated Contract Creation

A process called the "PeopleSoft Contract" starts and stops pay for Period Pay positions (Classes 6, 7, 8, and 9). PeopleSoft contracts are automatically created by the system after the hire is processed by HCM or sent directly to the database. The contact is automatically generated from the data that was entered into the TBH transaction by the Preparer.

Checking TBH Status

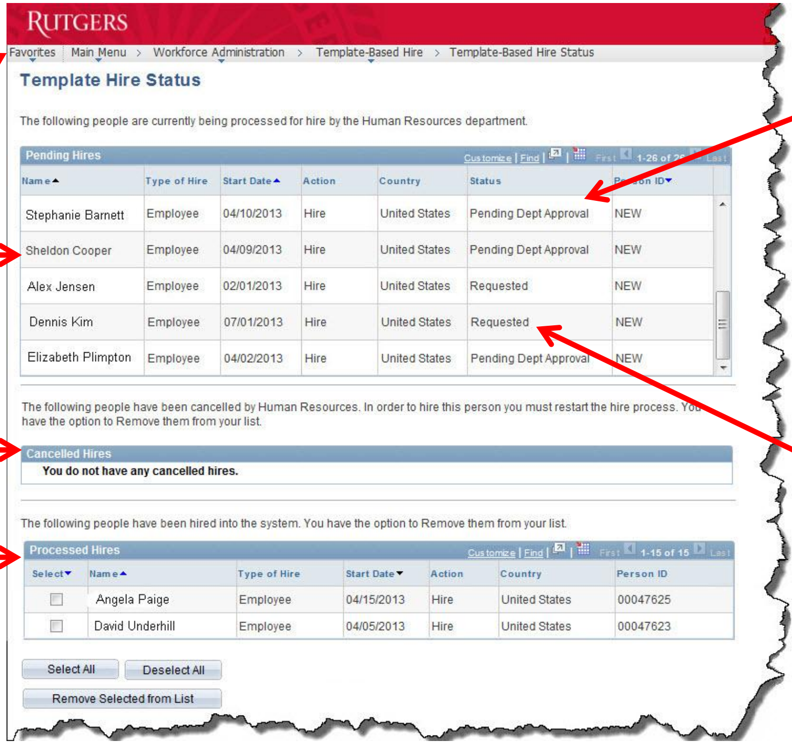
Preparers, you can check the status of hire transaction you submitted by navigating to the "**Template Hire Status**" screen. It displays pending, cancelled and processed TBHs.

Navigation

Pending Hires

Cancelled Hires

Processed Hires



Dept Approver has to approve

"Requested" or "Action Required" (not shown) means HCM or ALR has to process

Updating National ID (SSN)

For Existing Employees Already Active in HCM/Payroll System

When an employee who applied for an SSN receives one, you must fax an enlarged, readable copy of the card to your HCM Specialist and include the following information in the fax cover sheet:

- Preparer's Name
- Preparer's Contact Information
- Employee's Name (as it appears in HCM)
- Employee's ID Number (as it appears in HCM)
- Purpose of Fax (e.g., "Please update the Social Security Number for employee …")

In addition, you should call or email your HCM Specialist so they can be on the lookout for the fax. Your HCM Specialist updates the SSN in HCM.

Live

Demonstration

Demonstration

The instructor will now walk through the process of creating and submitting a Template-Based Hire in the HCM system.

Demo

Please Note: The link above is for UHR use only. It does not access the production HCM environment. Please do not attempt to log into the system via this link.

Additional Resources

Additional Assistance

HCM Unit:

- Hotline: 848-932-3888
- Fax: 732-932-0046
- E-mail: hcm_action_status@hr.rutgers.edu
- UHR HCM Unit Website: http://uhr.rutgers.edu/uhr-units-offices/human-capital-management-hcm
- HCM Blog: http://hcmblog.rutgers.edu/

  See the "Instructional Materials for HCM Users" heading for additional training materials, including sample role-specific TBH instruction documents (e.g., "Class 9 Fellows Template-Based Hire Instructions for HR Preparers").

Additional Assistance
(continued)

Office of Academic Labor Relations:

- Phone: 848-932-7174
- Website: http://academiclaborrelations.rutgers.edu

Payroll Services:

- Phone: 848-445-3007
- Website: http://payroll.rutgers.edu/

Questions & Answers

Thank you for your participation.