

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

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:

Hire transactions:

- 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

Note: 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.

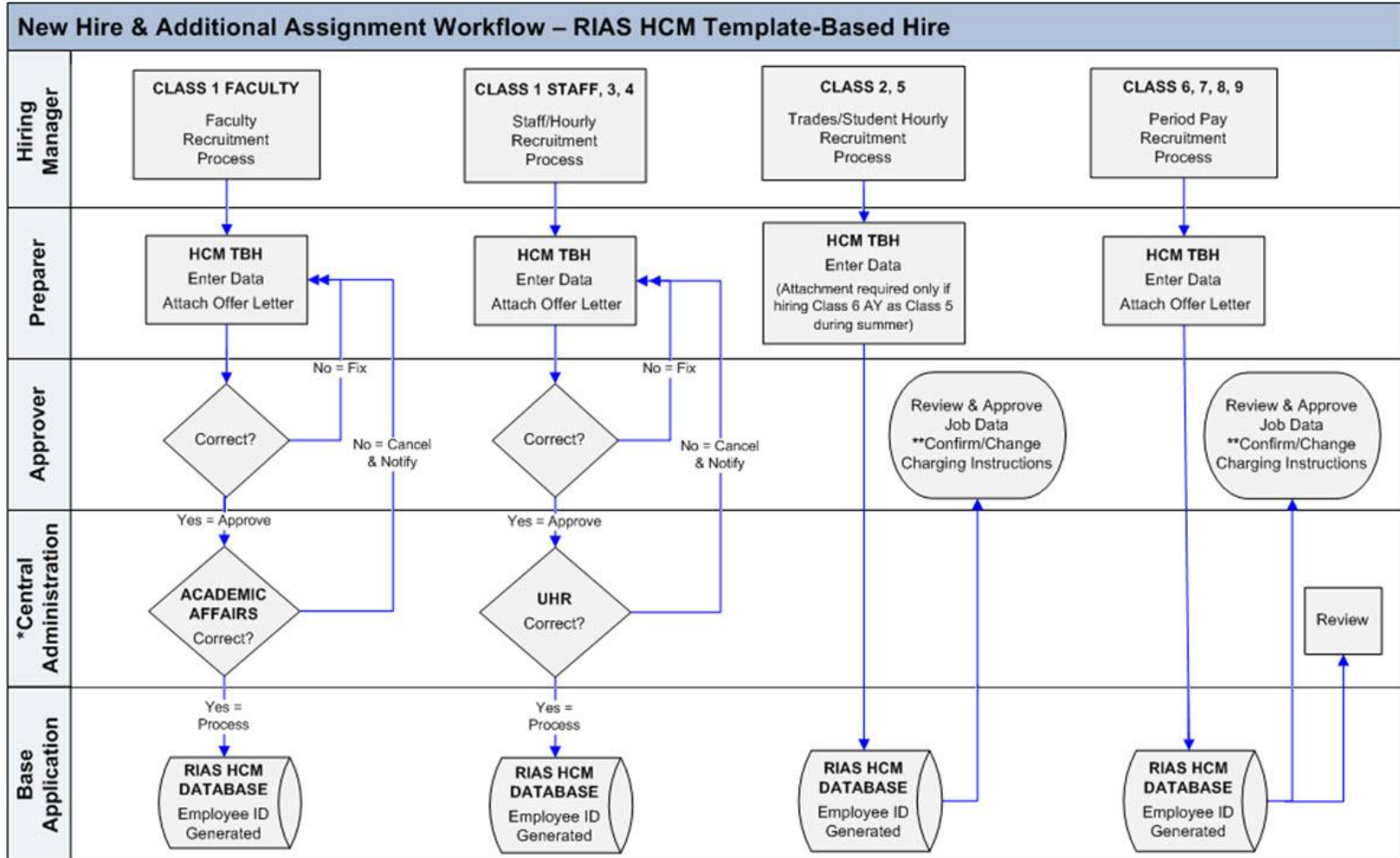
Visa/Citizenship data entered into HCM helps Payroll Services determine taxability and helps UHR identify employees who are not pension eligible.

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/>

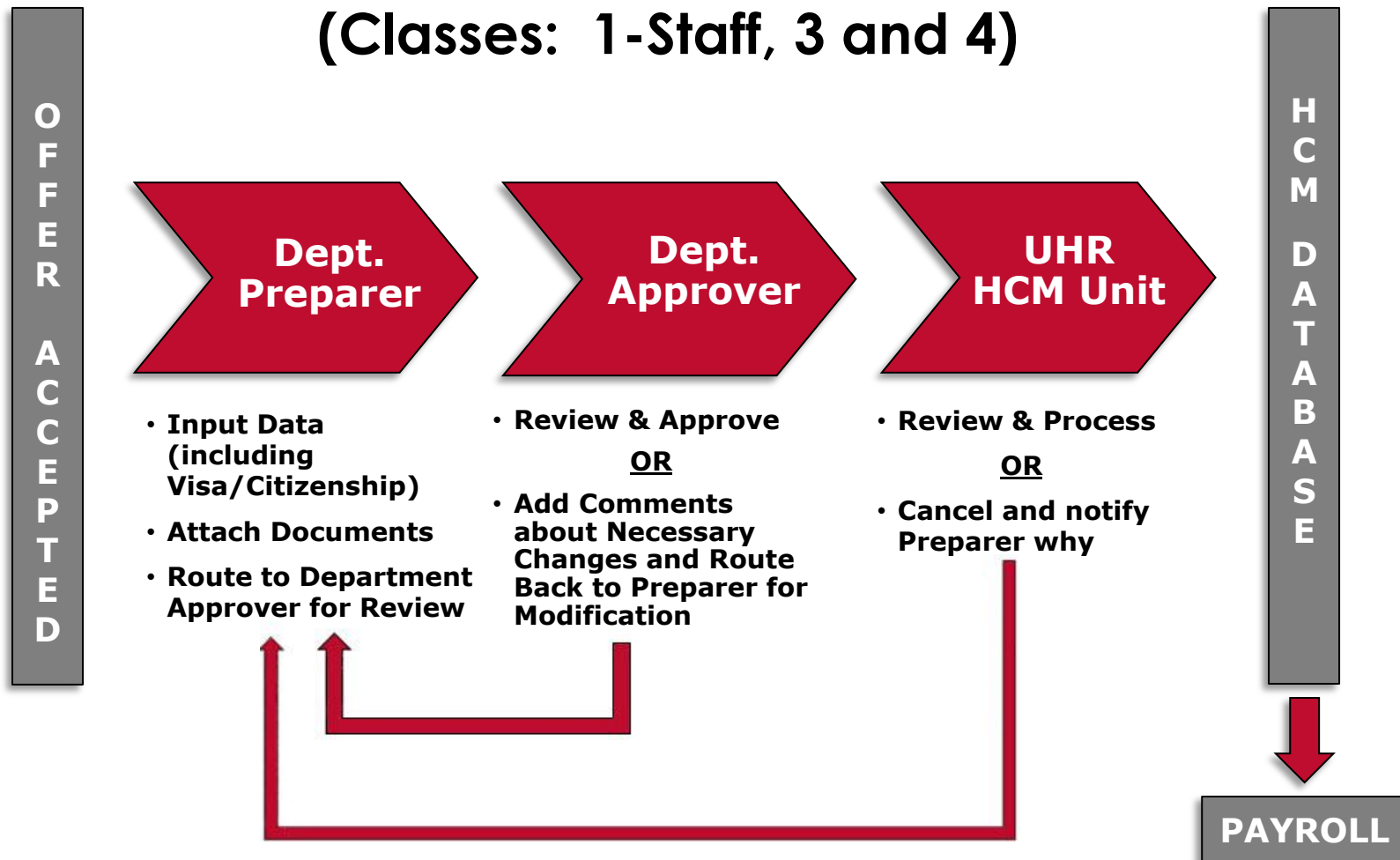


***Central Administration:** Class 1 Faculty positions are processed by Academic Affair; Class 1, 3, and 4 Staff positions are processed by University Human Resources (UHR).

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

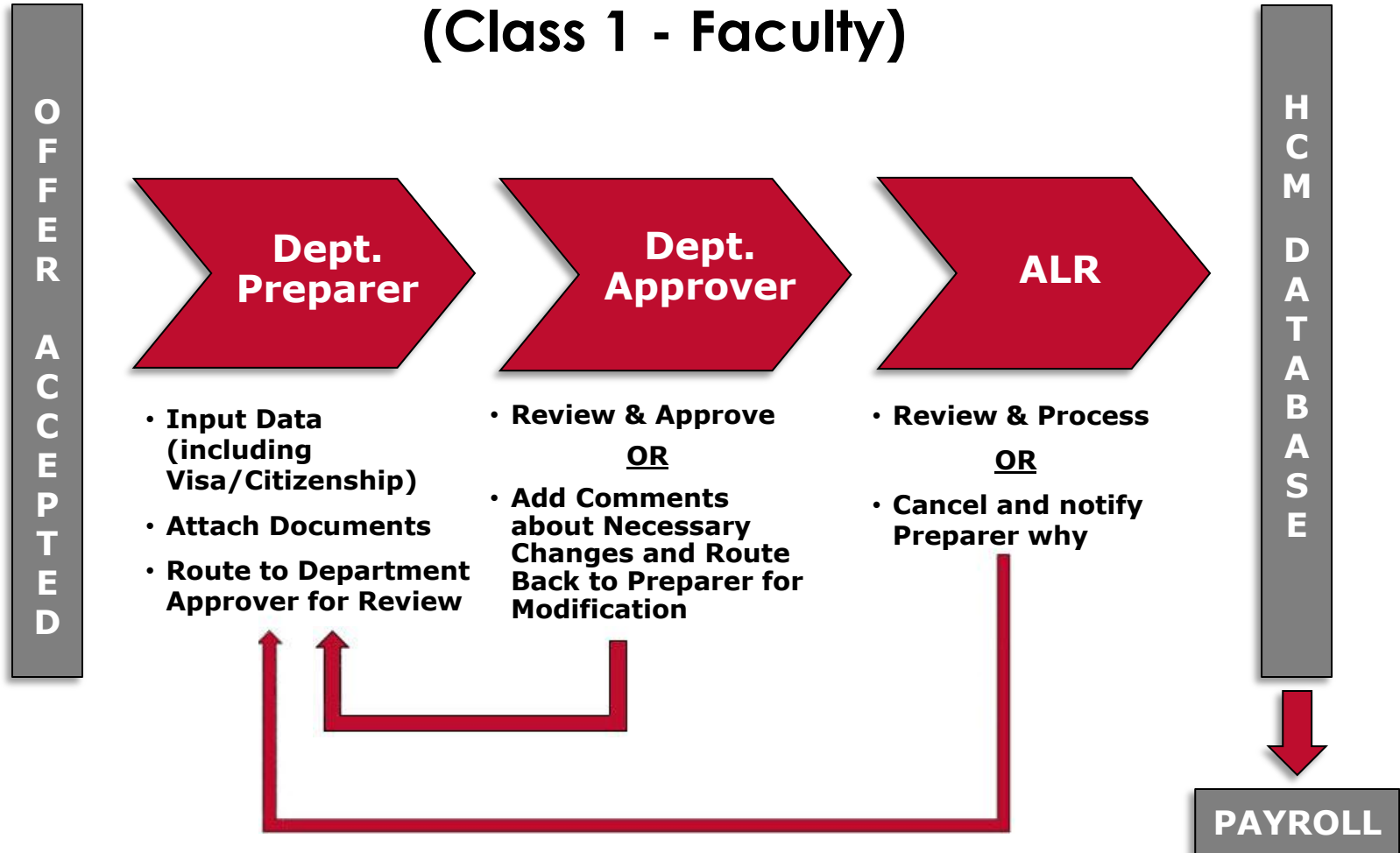
NOTE: If you submit a TBH for someone who already exists in the HCM Database, the system automatically routes the TBH to UHR for review and processing.

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



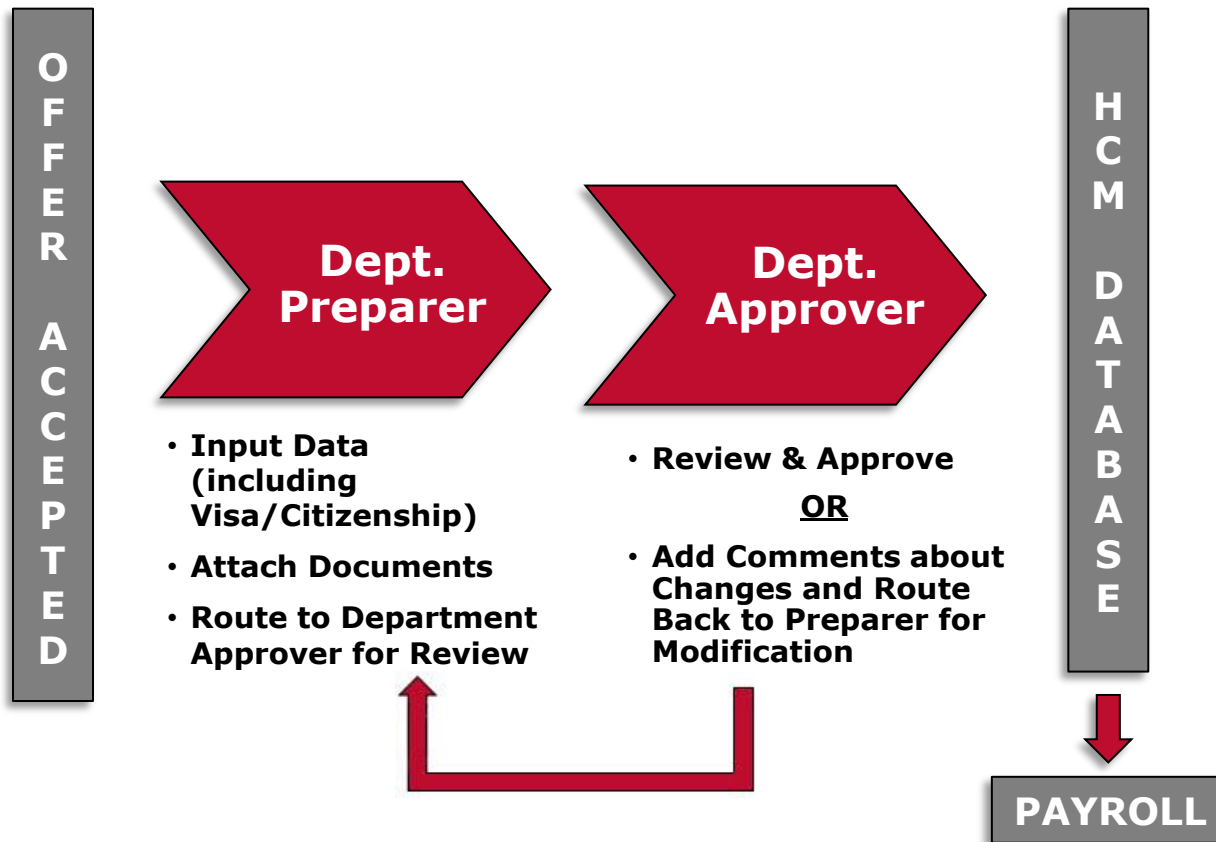
Note: If UHR needs to cancel the transaction, then the Preparer must re-enter it.

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)



Note: 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:

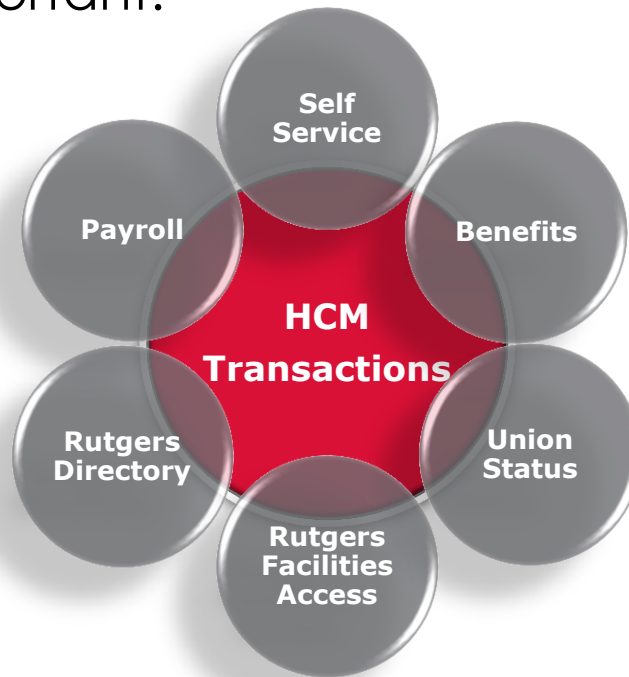
<http://hcmblog.rutgers.edu/>

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



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 “**HCM and Payroll Application**” link from the RIAS Gateway screen under the “**HCM Related Applications**” heading.

Rutgers Integrated Administration

Today's Date: 27-MAR-2012
Last Month Closed: FEB-12
FDW Last Updated: 27-MAR-2012 02:00 AM
Current Fiscal Period(s): MAR-12

RIAS is available from 7:00 a.m. Monday to 5:00 p.m. Saturday

HCM and Payroll

Self Service

- [W-2 Online Consent](#)
- [View W-2](#)
- [Personal Information Summary](#)
- [Self Service](#)
- [View Paycheck](#)
- [Update Direct Deposit Information](#)
- [Payroll and Compensation](#)
- [Federal W-4 Tax Information](#)
- [State W-4 Tax Information](#)
- [Benefit Summary](#)
- HCM Related Applications**
- [HCM and Payroll Application](#)
- [Guardian I-9 System](#)
- [Absence Reporting System](#)
- [Applicant Tracking System](#)

HCM/Payroll New

[2011 W-2 Statement Now Available Online](#)

Please remember to keep your Personal Identification Number, up to date in Self Service. A new PIN is available on the left hand side. (Posted 3/27/12)

RIAS/HR

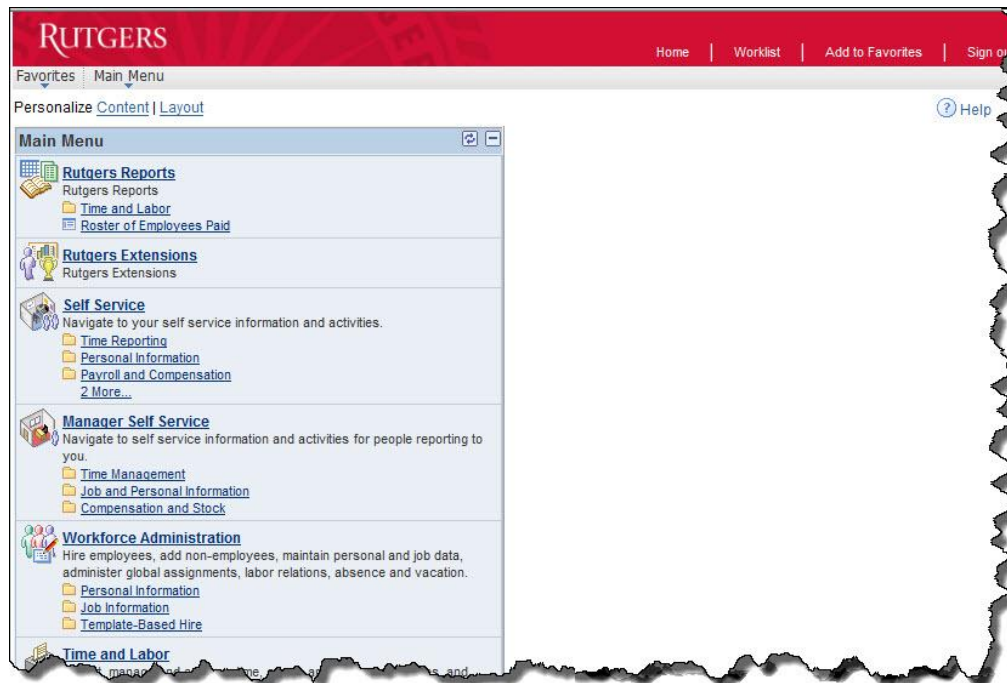
If you have questions when using the HCM System, please call HR at 848-932-3020 option 6.

Hours of Operation are 8:30 - 5 pm Monday through Friday
servicedesk@hr.rutgers.edu

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.



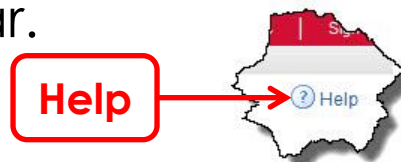
Universal Header Bar

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.

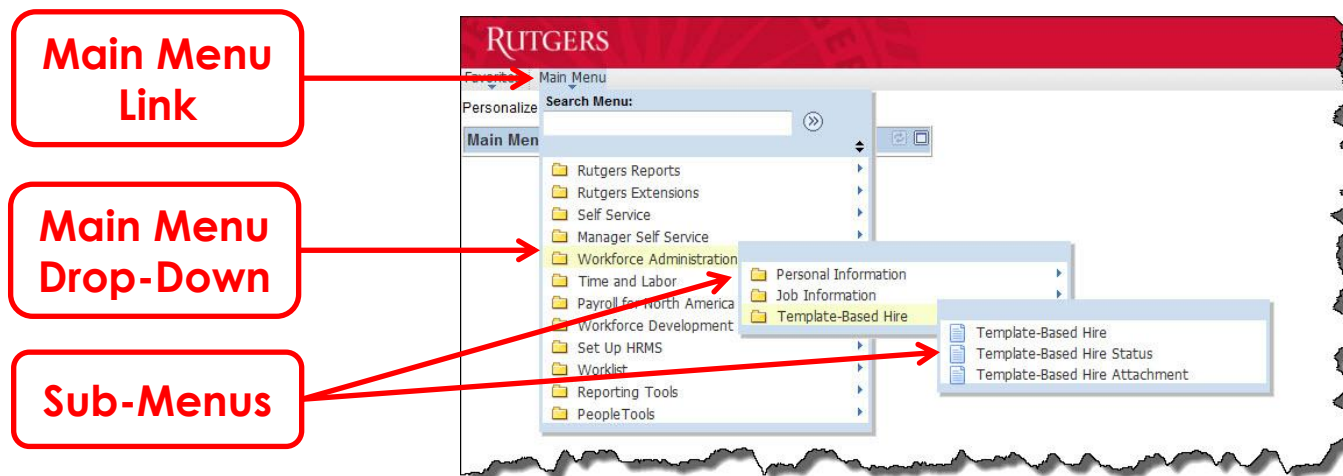


Navigation Methods

(continued)

Drop-Down Menu Navigation:

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.

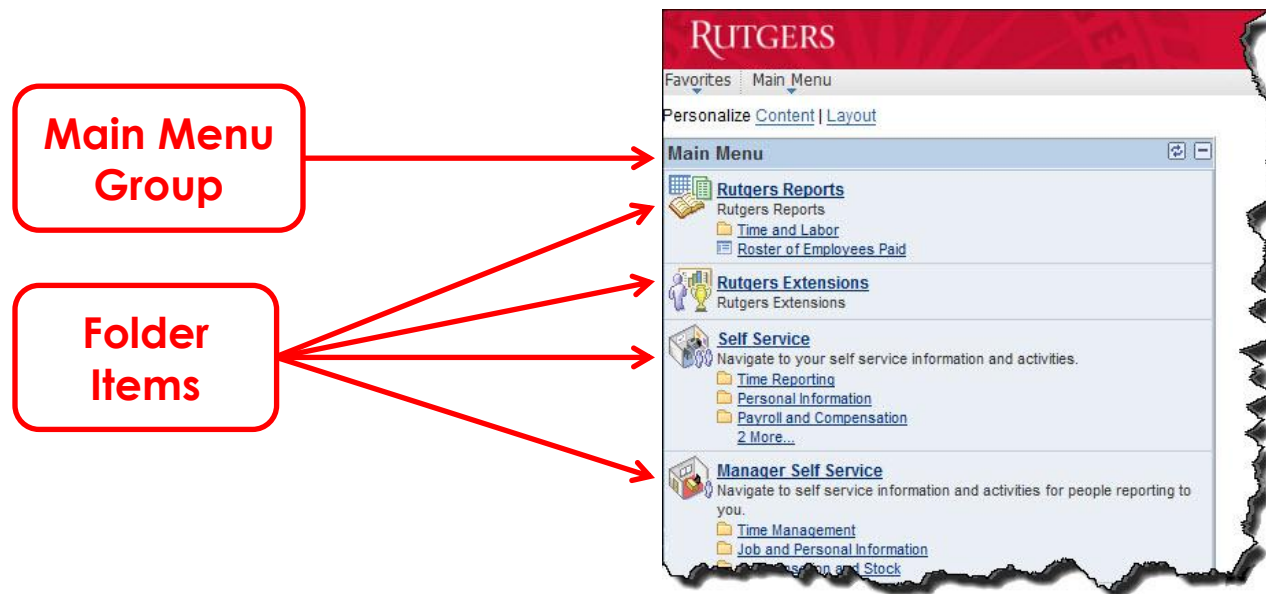


Navigation Methods

(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.



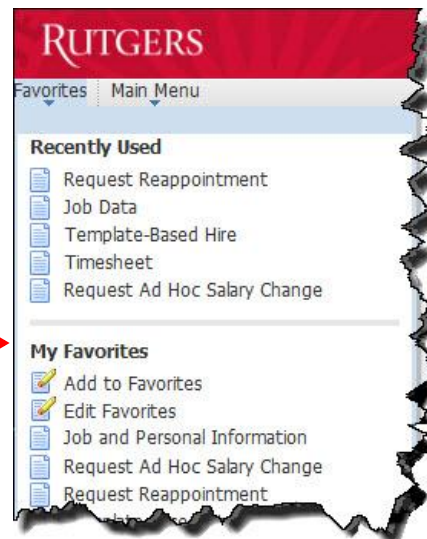
Navigation Methods

(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

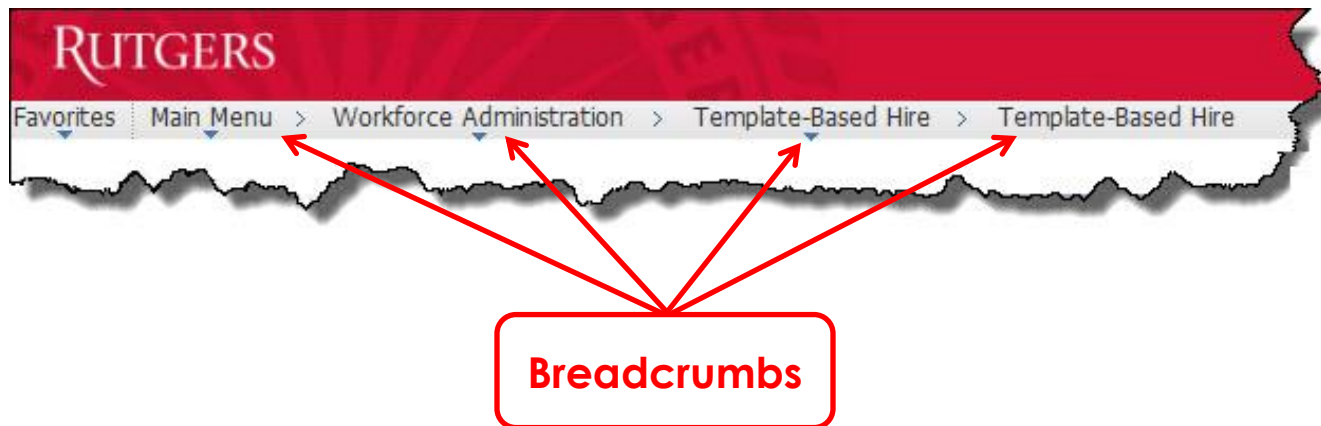


Navigation Methods

(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:

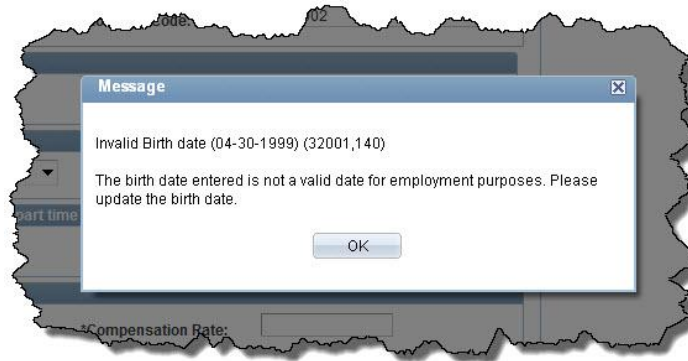
Icon	Action
	Choose a date from the calendar.
	Look up or search for a value.
	Select a value from a drop-down list.

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.



Note: 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.

The screenshot shows the 'Enter Employee Information' screen in the Rutgers Workforce Administration system. The breadcrumb trail is 'Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire'. The page title is 'Template-Based Hire'. Below the title is a sub-header 'Enter Employee Information' and a note: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' There are five tabs: 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'National ID' tab is active. Below the tabs are sections for 'Hire Template Information' (Template: Regular Staff Employees, Effective Date: 01/01/2013), 'Employee Information' (Social Security Number), and 'Comments'. The 'Comments' section has a text area with the following text: 'Siri - Please fix the location code on the Job Information tab. Per the Offer Letter, it should be 10331 not 10330. Thanks, Toby'. A red arrow points from the text box in the callout to the 'Comments' text area. At the bottom left of the form is a link 'Edit Hire Details'.

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

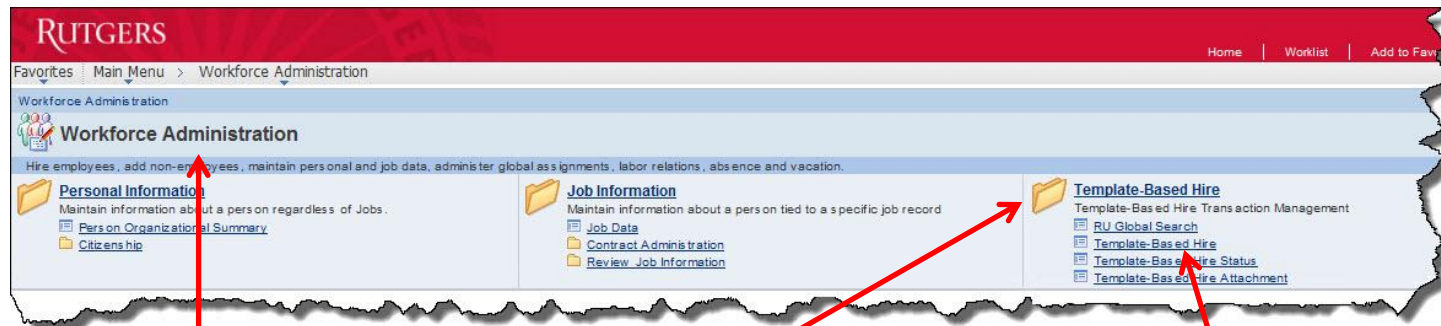


Instructions for Preparers (Initial Submission)

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.



**Workforce
Administration**

**Template-Based Hire
Group**

**Template-Based Hire
Link**

Steps to Enter a TBH

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

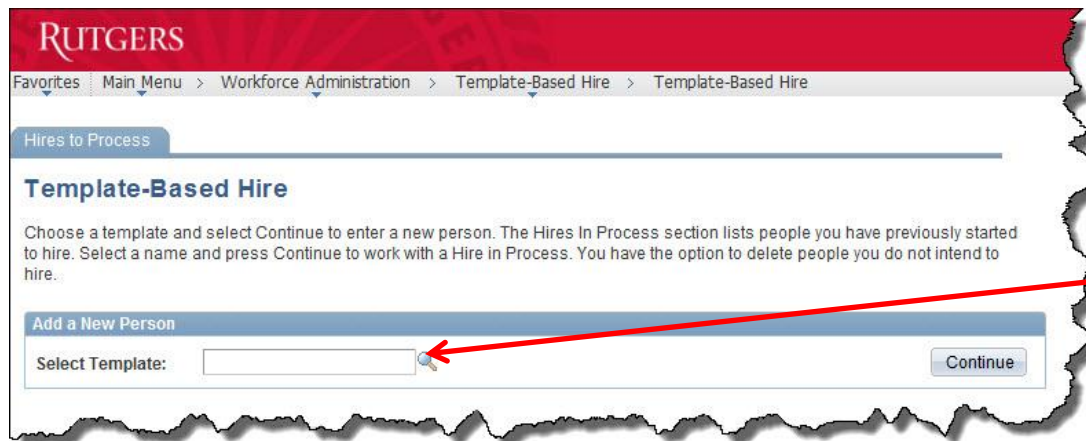
1. Select Template
2. Enter Job Effective Date
3. Enter Data into Data Fields on the Template (e.g., National ID, Personal Information, etc.)
4. Attach Required Documents (e.g., Offer Letter)
5. Submit to Department Approver for Review and Approval
6. Modify TBH, if necessary, and Resubmit

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.



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Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Hires to Process

Template-Based Hire

Choose a template and select Continue to enter a new person. The Hires In Process section lists people you have previously started to hire. Select a name and press Continue to work with a Hire in Process. You have the option to delete people you do not intend to hire.

Add a New Person

Select Template: 

Continue



Icon

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.

Template Links

Template Selected

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.

The screenshot shows the 'Enter Hire Details' form in the Rutgers HR system. The form is titled 'Template-Based Hire' and 'Enter Hire Details'. It contains the following fields:

- Template: Temporary Assignments
- *Job Effective Date: 02/01/2013
- Action: Hire

There are two buttons: 'Continue' and 'Cancel'. The form is annotated with red boxes and arrows:

- A red box labeled 'Job Effective Date' points to the date field.
- A red box labeled 'Continue Button' points to the 'Continue' button.
- A red box labeled 'Icon' points to the calendar icon next to the date field.

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.

The screenshot shows the 'Enter Employee Information' screen in the Rutgers Workforce Administration system. The page has a red header with the Rutgers logo. Below the header is a breadcrumb trail: 'Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire'. The main title is 'Enter Employee Information'. Below the title is a paragraph of instructions: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' There are five tabs: 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'Hire Template Information' section is highlighted with a blue bar. Below this bar, the 'Template:' field shows 'Teaching/Graduate Assistants' and the 'Effective Date:' field shows '02/01/2013'. Three red callout boxes with arrows point to these fields: 'Hire Template Information' points to the blue bar, 'Template Selected' points to the 'Teaching/Graduate Assistants' text, and 'Effective Date Entered' points to the '02/01/2013' text.

Hire Template Information

Enter Employee Information

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.

National ID | Personal Information | Citizenship/Visa | Job Information | Template Status

Hire Template Information

Template: Teaching/Graduate Assistants Effective Date: 02/01/2013

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.

The screenshot shows the 'Enter Employee Information' form in the Rutgers system. The form has a red header with the Rutgers logo and a breadcrumb trail: 'Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire'. The main title is 'Template-Based Hire' followed by 'Enter Employee Information'. Below the title is a instruction: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' The form is divided into five tabs: 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'National ID' tab is currently selected. Below the tabs are several sections: 'Hire Template Information' with fields for 'Template' (Teaching/Graduate Assistants) and 'Effective Date' (02/01/2013); 'Employee Information' with a 'National Security Number' field; and 'Comments' with a text area. At the bottom, there is an 'Edit Hire Details' link and four buttons: 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A red box labeled 'Tabs' has four arrows pointing to the five tabs. A red box labeled 'Save for Later' has an arrow pointing to the 'Save for Later' button.

Tabs

Save for Later

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

The screenshot shows the Rutgers 'Enter Employee Information' form. The form has a red header with the Rutgers logo. Below the header is a navigation bar with links: Favorites, Main Menu, Workforce Administration, Template-Based Hire, and Template-Based Hire. The main title is 'Template-Based Hire' and the subtitle is 'Enter Employee Information'. A message states: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' There are five tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The 'National ID' tab is selected. The form contains fields for 'Hire Template Information' (Template: Teaching/Graduate Assistants, Effective Date: 04/15/2013), 'Employee Information' (Social Security Number, *National ID: 111445432), and 'Comments' (Comments:). At the bottom, there are four buttons: 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A red arrow points from the 'Save for Later Button' text to the '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

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Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Hires to Process

Template-Based Hire

Choose a template and select Continue enter a new person. The Hires to Process section lists people you have previously started to hire. Select a name and press Continue to work with a Hire in Process. You have the option to delete people you do not intend to hire.

Add a New Person

Select Template:

Select	Name	Type of Hire	Start Date	Action	Country
<input type="checkbox"/>	Sheldon Cooper	Employee	03/11/2013	Hire	United States
<input type="checkbox"/>	Raj Koothrappali	Employee	03/12/2013	Hire	United States
<input type="checkbox"/>	Leonard Hofstadter	Employee	03/18/2013	Hire	United States
<input type="checkbox"/>	Howard Wolowitz	Employee	04/01/2013	Hire	United States

Select All Deselect All

Delete Selected Names

Go To: [Template-Based Hire Status](#)

Returning to Complete a Saved TBH

(continued)

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

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Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Template-Based Hire

Enter Hire Details

Name: Raj Koothrappali

The following information is required before hiring, rehiring, adding, or renewing a Person.

Hire Details

Template: Part Time Lecturer

*Job Effective Date: 02/01/2013

Action: Hire

Continue

Cancel

* Required Field

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.

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form has several tabs: 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'National ID' tab is selected, and the 'National ID' field is highlighted with a red box and an arrow pointing to it from a label 'National ID/SSN Field'. The 'Personal Information' tab is also highlighted with a red box and an arrow pointing to it from a label 'Personal Info. Tab'. The 'National ID' field contains the value '111445432'. The form also includes fields for 'Social Security Number', 'Comments', and 'Effective Date' (02/01/2013). At the bottom, there are buttons for 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A legend indicates that an asterisk (*) denotes a required field.

National ID Tab

National ID/SSN Field

Personal Info. 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 not 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**

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form has tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'National ID' tab is selected. Under 'Hire Template Information', the 'Template' is 'Teaching/Graduate Assistants' and the 'Effective Date' is '02/01/2013'. Under 'Employee Information', the 'Social Security Number' field is empty, and the '*National ID' field contains '999999999'. A red arrow points from the text box on the left to this field. Below the 'Employee Information' section is a 'Comments' field. At the bottom, there are buttons for 'Edit Hire Details', 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'.

Note: 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

RUTGERS

Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Template-Based Hire

Enter Employee Information

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.

National ID | **Personal Information** | Citizenship/Visa | Job Information | Template Status

Hire Template Information

Template: Teaching/Graduate Assistants Effective Date: 02/01/2013

Employee Information

National ID

National ID: 111-44-5432

Primary Name - English

Name Prefix: Dr. ▼

*First Name: Eric

Middle Name:

*Last Name: Gablehauser

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.

The screenshot shows a web form with a torn paper border. At the top, there are fields for *State (NJ), *Postal Code (08765), and County. Below these are three sections for phone numbers, each with a blue header bar: 'Person Phone Number 01', 'Person Phone Number 02', and 'Person Phone Number 03'. Each section contains a 'Phone Type' dropdown and a 'Telephone' input field. In the first section, the phone type is 'Home' and the number is '848-200-5678'. In the second, the type is 'Business' and the field is empty. In the third, the type is 'Mobile' and the field is empty. Below the phone sections is a section for email with a blue header 'Person Email Address 01', an 'Email Type' dropdown set to 'Home', and an '*Email Address' field containing 'drEG@bbtphysicsdept.net'. At the bottom is a 'Comments' field. A red rounded rectangle on the left contains the text 'Person Phone Number Fields' in red, with three red arrows pointing to the three phone number sections.

Person Phone Number Fields

*State: NJ

*Postal Code: 08765

County:

Person Phone Number 01

Phone Type: Home Telephone: 848-200-5678

Person Phone Number 02

Phone Type: Business Telephone:

Person Phone Number 03

Phone Type: Mobile Telephone:

Person Email Address 01

Email Type: Home *Email Address: drEG@bbtphysicsdept.net

Comments

Enter Personal Information (continued)

- When finished, click on the “**Citizenship/Visa**” tab.

Citizenship/Visa Tab

The screenshot shows the 'Enter Employee Information' page in the Rutgers HR system. The 'Citizenship/Visa' tab is highlighted with a red box and an arrow. The page includes a breadcrumb trail: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. Below the breadcrumb, the 'Enter Employee Information' section contains a warning: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' The tabs are: National ID, Personal Information, Citizenship/Visa (selected), Job Information, and Template Status. The 'Hire Template Information' section shows 'Template: Teaching/Graduate Assistants' and 'Effective Date: 02/01/2013'. The 'Employee Information' section includes 'National ID' (111-44-5432) and 'Primary Name - English' (Name Prefix: Dr., *First Name: Eric, Middle Name: , *Last Name: Gablehauser).

RUTGERS

Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Template-Based Hire

Enter Employee Information

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.

National ID | Personal Information | **Citizenship/Visa** | Job Information | Template Status

Hire Template Information

Template: Teaching/Graduate Assistants Effective Date: 02/01/2013

Employee Information

National ID

National ID: 111-44-5432

Primary Name - English

Name Prefix: Dr. ▼

*First Name: Eric

Middle Name:

*Last Name: Gablehauser

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.

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is titled 'Template-Based Hire' and 'Enter Employee Information'. It includes tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'Citizenship/Visa' tab is active. The form contains fields for 'Template', 'Effective Date', 'US Citizen', 'Permanent US Resident (Non US Citizen)', 'Does person have a work Visa?', and 'Country of Residence'. The 'US Citizen' field is set to 'Yes', and the 'Country of Residence' field is populated with 'USA'. Red annotations highlight the 'US Citizen = Yes' field and the 'System Populated Fields' (Country of Residence, Permanent US Resident, and Does person have a work Visa?).

US Citizen = Yes

System Populated Fields

US Citizen Yes

***Permanent US Resident (Non US Citizen):** No

***Does person have a work Visa?:** No

***If no, enter Country of Residence:** USA

Enter Citizenship/Visa Information (continued)

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

US Citizen = No

Enter Template Information

Template: CoAdj, Faculty, Research Effective Date: 05/15/2013

Employee Information

Citizenship Information

US Citizen: No

*Permanent US Resident (Non US Citizen):

*Does person have a work Visa?:

*If no, enter Country of Residence:

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



Enter Citizenship/Visa Information (continued)

- C. If the employee is not a US citizen, but is 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.

On the data that you have entered, some fields will be required. The system will notify you of those fields as you enter data.

National ID Personal Information **Citizenship/Visa** Job Information Template Status

Hire Template Information

Template: Part Time Lecturer Effective Date: 02/01/2014

Employee Information

Citizenship Information

*US Citizen: No

*Permanent US Resident (Non US Citizen): Yes

*Does person have a work Visa?:

*If no, enter Country of Residence: USA

Visa/Permit Information for Nonresidents

Visa/Permit Type:

**Permanent US
Resident = Yes**

**Country of
Residence = USA**

Enter Citizenship/Visa Information (continued)

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

On the data that you enter, some words will become required. The system will use those words as you enter data.

National ID Personal Information **Citizenship/Visa** Job Information Template Status

Hire Template Information

Template: Part Time Lecturer Effective Date: 02/01/2014

Employee Information

Citizenship Information

*US Citizen: No

*Permanent US Resident: Yes

(Non US Citizen):

*If no, enter Country of Residence: USA

*Does person have a work Visa?: No

Visa/Permit Information for Nonresidents


Visa/Permit Type:

**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



Enter Template Information

Template: CoAdj. Faculty, Research Effective Date: 05/15/2013

Employee Information

Citizenship Information

*US Citizen: No

*Permanent US Resident (Non US Citizen): No

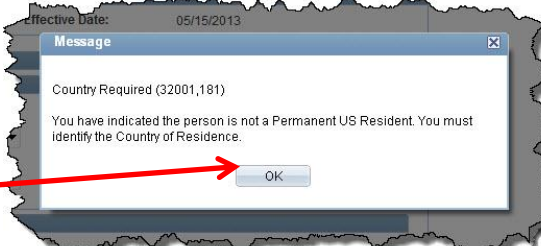
*Does person have a work Visa?:

*If no, enter Country of Residence:

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

Country Required Message

OK Button



Effective Date: 05/15/2013

Message

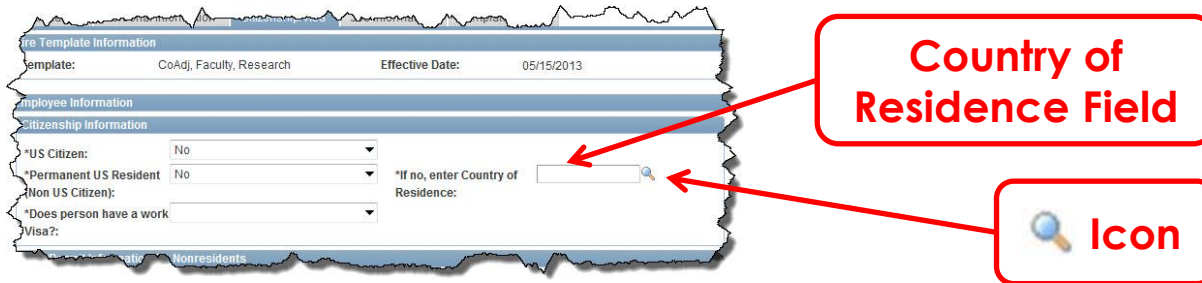
Country Required (32001,181)

You have indicated the person is not a Permanent US Resident. You must identify the Country of Residence.

OK

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.

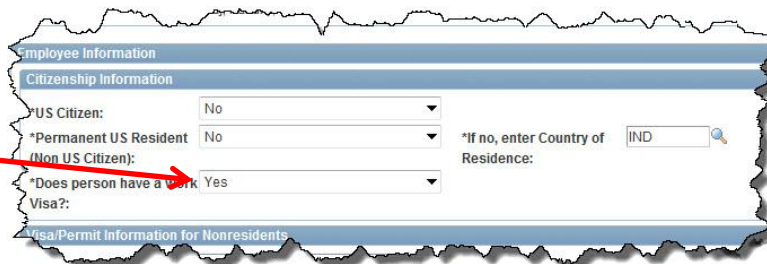


Look Up Window - Country Column and Links

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



The screenshot shows a form titled "Employee Information" with a sub-section "Citizenship Information". It contains the following fields:

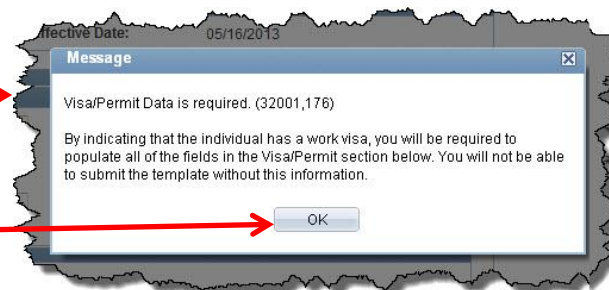
- *US Citizen: No
- *Permanent US Resident (Non US Citizen): No
- *Does person have a work Visa?: Yes
- *If no, enter Country of Residence: IND

A red arrow points from the text box "Does person have a work Visa? = Yes" to the "Does person have a work Visa?" field.

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

Visa/Permit Data
Required Message

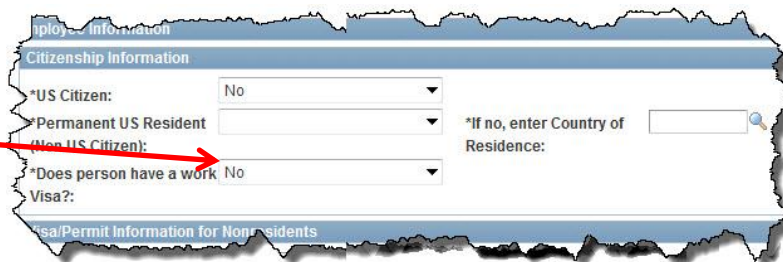
OK Button



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.

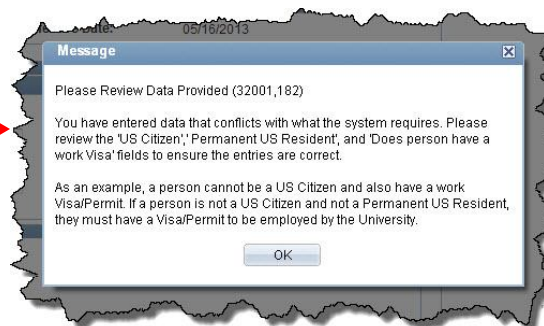
Does person
have a work
Visa? = No



The screenshot shows a web form titled 'Citizenship Information'. It contains several dropdown menus: '*US Citizen:' (set to 'No'), '*Permanent US Resident (Non-US Citizen):', and '*Does person have a work Visa:'. A red arrow points from a text box to the 'Does person have a work Visa:' dropdown menu. To the right, there is a field for '*If no, enter Country of Residence:'.

- L. The “**Please Review Data Provided**” message will appear.

Please Review
Data Provided
Message

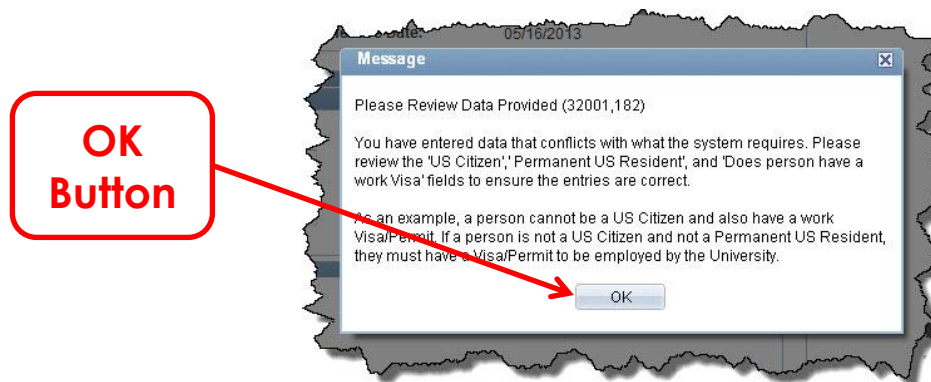


Enter Citizenship/Visa Information

(continued)

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

Note: 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 all fields in the “**Visa/Permit Information for Nonresidents**” section.

Visa/Permit
Information
for
Nonresidents
Sections

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The 'Citizenship/Visa' tab is selected. The 'Hire Template Information' section shows 'Template: CoAdj, Faculty, Research' and 'Effective Date: 05/16/2013'. The 'Employee Information' section includes 'Citizenship Information' with fields for '*US Citizen:', '*Permanent US Resident (Non US Citizen):', and '*Does person have a work Visa?:' (set to 'Yes'). The '*If no, enter Country of Residence:' field is set to 'IND'. The 'Visa/Permit Information for Nonresidents' section is highlighted with a red arrow from the text box on the left. It contains fields for 'Visa/Permit Type:', 'Date of Entry into Country:', 'Visa/Permit Status:', 'Status Date:', and 'Status Expiration Date:'.

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.

The screenshot shows a web form titled "Job Information - Job Code" with a torn paper effect. It contains fields for "Visa/Permit Status:", "Status Date:", and "Status Expiration Date:". Below these is the "Job Information - Job Code" section, which includes a field for "*Job Code:" with the value "99722" and a magnifying glass icon. A "Comments" section is at the bottom. Three red callout boxes with arrows point to specific elements: "Job Info. - Job Code Area" points to the top section, "Selected Job Code" points to the "99722" value, and "Button" points to the magnifying glass icon.

Job Info. – Job Code Area

Selected Job Code

Button

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.

Job Information Tab

The screenshot shows the Rutgers HR system interface. At the top is a red header with the Rutgers logo. Below it is a breadcrumb trail: Favorites > Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The main content area is titled 'Template-Based Hire' and 'Enter Employee Information'. A message states: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' Below this message are five tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The 'Job Information' tab is highlighted with a red arrow pointing to it from the 'Job Information Tab' label above. Below the tabs is a section titled 'Hire Template Information' with a table showing 'Template: Teaching/Graduate Assistants' and 'Effective Date: 02/01/2013'.

Hire Template Information	
Template:	Teaching/Graduate Assistants
Effective Date:	02/01/2013

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**

The screenshot displays the 'Enter Employee Information' form in the Rutgers Workforce Administration system. The form is titled 'Template-Based Hire' and includes a breadcrumb trail: 'Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire'. Below the title, there is a sub-header 'Enter Employee Information' and a note: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' The form is divided into several sections: 'Hire Template Information', 'Employee Information', 'Job Code Information', 'Work Location - Position Data', and 'Work Location - Expected Job End Date'. The 'Job Code Information' section is highlighted with a red box and contains the following data: Job Code: 99722, Description: TEACHING ASSISTANT ACD YR, Standard Hours: 15.000000, FLSA Status: Exempt, and Union Code: 008. The 'Hire Template Information' section shows 'Template: Teaching/Graduate Assistants' and 'Effective Date: 02/01/2013'. The 'Work Location - Position Data' section shows 'Position Entry Date: 02/01/2013'. The 'Work Location - Expected Job End Date' section is empty. Red arrows point from the text 'Examples of Auto-Populated Fields' to the 'Job Code Information' section, the 'Effective Date' field, and the 'Position Entry Date' field.

Job Code Information			
Job Code:	99722	Description:	TEACHING ASSISTANT ACD YR
Standard Hours:	15.000000	FLSA Status:	Exempt
Union Code:	008		

Hire Template Information	
Template:	Teaching/Graduate Assistants
Effective Date:	02/01/2013

Work Location - Position Data	
Position Entry Date:	02/01/2013

Work Location - Expected Job End Date	

Note: 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.

The screenshot shows the 'Enter Employee Information' form in the Rutgers Workforce Administration system. The form is divided into several sections: 'Hire Template Information', 'Employee Information', 'Work Location - Position Data', 'Work Location - Expected Job End Date', 'Work Location - Job Fields', 'Job Information - Reporting Information', and 'Job Information - Status'. Red callout boxes with arrows point to specific fields: 'Default Standard Hours for Full-Time Position' points to the 'Standard Hours' field in the 'Employee Information' section, which shows '15.000000'; '*Full/Part Time Field with Part-Time Selected' points to the '*Full/Part Time' dropdown menu in the 'Job Information - Status' section, which is set to 'Part-Time'; and '*Standard Hours Field with Number of Hours Employee will Work Entered' points to the '*Standard Hours' field in the 'Job Information - Status' section, which shows '7.500000'. The form also includes fields for 'Job Code', 'Union Code', 'Position Entry Date', 'Expected Job End Date', 'Department', 'Location Code', and 'Supervisor ID'.

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)

- 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.

The image shows two screenshots of a web form with red callout boxes and arrows pointing to specific fields and buttons.

Top Screenshot: This is a form titled "Job Attachment Required". It contains the following fields:

- Comp Rate Code: NAANNL
- *Compensation Rate: (empty text box)
- *Job Attachment Exists: A dropdown menu currently showing "Yes".
- Comments: (empty text area)

A red callout box labeled "Job Attachment Exists Field" has an arrow pointing to the "Job Attachment Exists" dropdown menu.

Bottom Screenshot: This is a form titled "Details". It contains the following buttons:

- Save for Later
- Cancel
- Add Attachment

Two red callout boxes have arrows pointing to these buttons:

- A box labeled "Save for Later Button" points to the "Save for Later" button.
- A box labeled "Add Attachment Button" points to the "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.

The screenshot shows the 'Job Offer Attachment' window. A red rounded rectangle with the text 'Job Offer Attachment Window' has an arrow pointing to the window title. Another red rounded rectangle with the text 'Search Button' has an arrow pointing to the 'Search' button at the bottom of the form.

Job Offer Attachment Window

Search Button

Job Offer Attachment

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Maximum number of rows to return (up to 300):

Template Sequence: =

Empl ID: begins with

Empl Record: =

Name: begins with

Department ID: begins with

Department: begins with

User ID: begins with

Entered From: >=

Entered Until: <=

☐ Case Sensitive

[Basic Search](#)

Note: 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)

- 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.

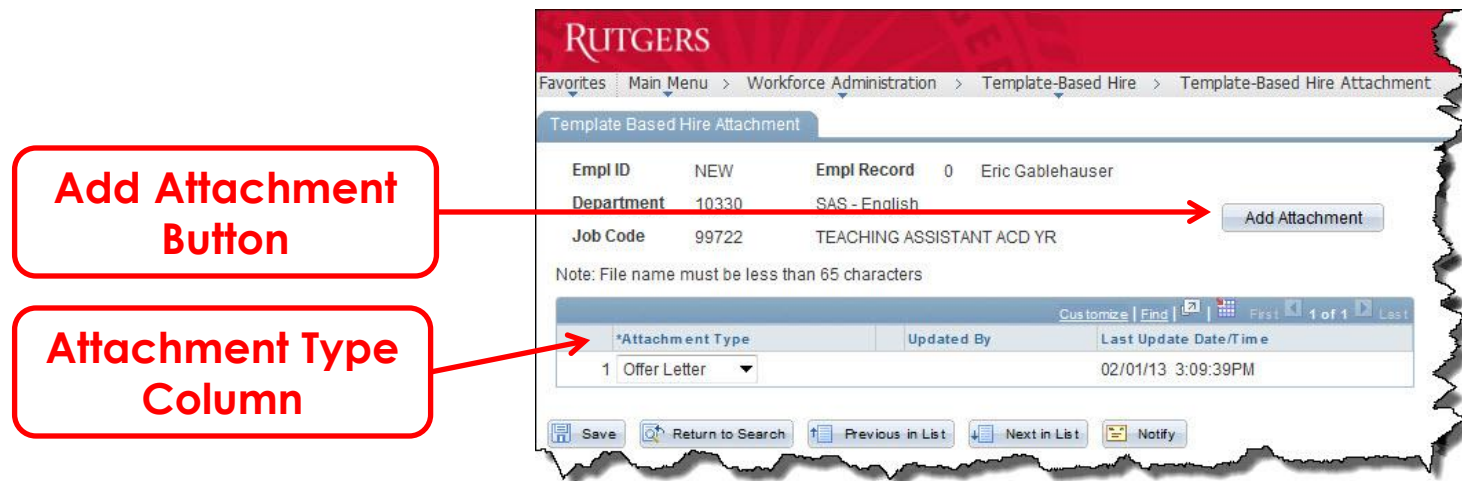
The screenshot shows the Rutgers Job Offer Attachment search interface. On the left, three red-bordered boxes with red text provide annotations: 'Name Column' points to the 'Name' column header in the search results table; 'Search Results Area' points to the entire table area; and 'Name Links' points to the underlined names in the 'Name' column. The search results table has columns: Template Sequence, Empl ID, Empl Record, Name, Department ID, and Department. The first three rows of data are visible.

Template Sequence	Empl ID	Empl Record	Name	Department ID	Department
47983	NEW	0	Penny Unknown	10330	SAS - English
48009	NEW	0	Leslie Winkle	10330	SAS - English
48028	NEW	0	Eric Gablehauser	10330	SAS - English

Attach Offer Letter

(continued)

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



The screenshot shows the 'Template-Based Hire Attachment' screen. It includes fields for Employee ID (NEW), Department (10330), Job Code (99722), and a list of attachment types. A red box labeled 'Add Attachment Button' points to the 'Add Attachment' button. Another red box labeled 'Attachment Type Column' points to the 'Attachment Type' dropdown menu which is currently set to 'Offer Letter'.

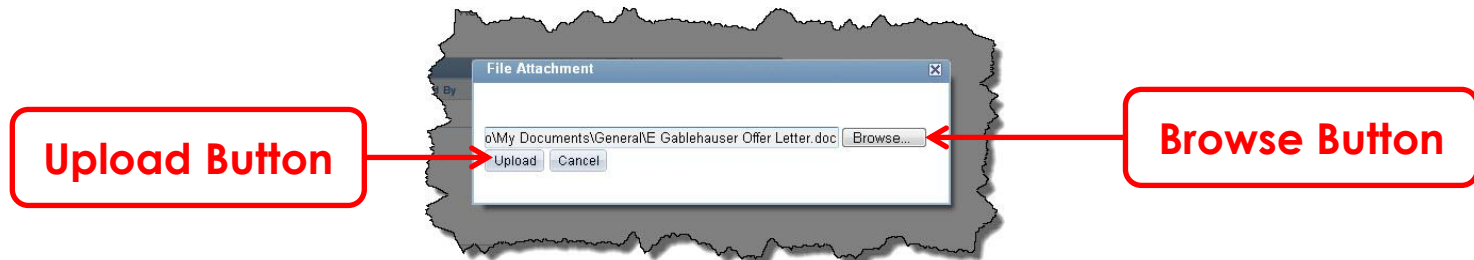
*Attachment Type	Updated By	Last Update Date/Time
1 Offer Letter ▼		02/01/13 3:09:39PM

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

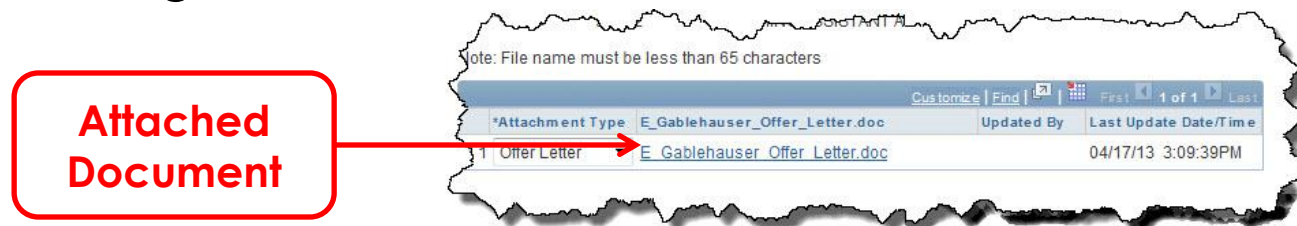
Attach Offer Letter

(continued)

- 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.
- Then, click on the “**Upload**” button.



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

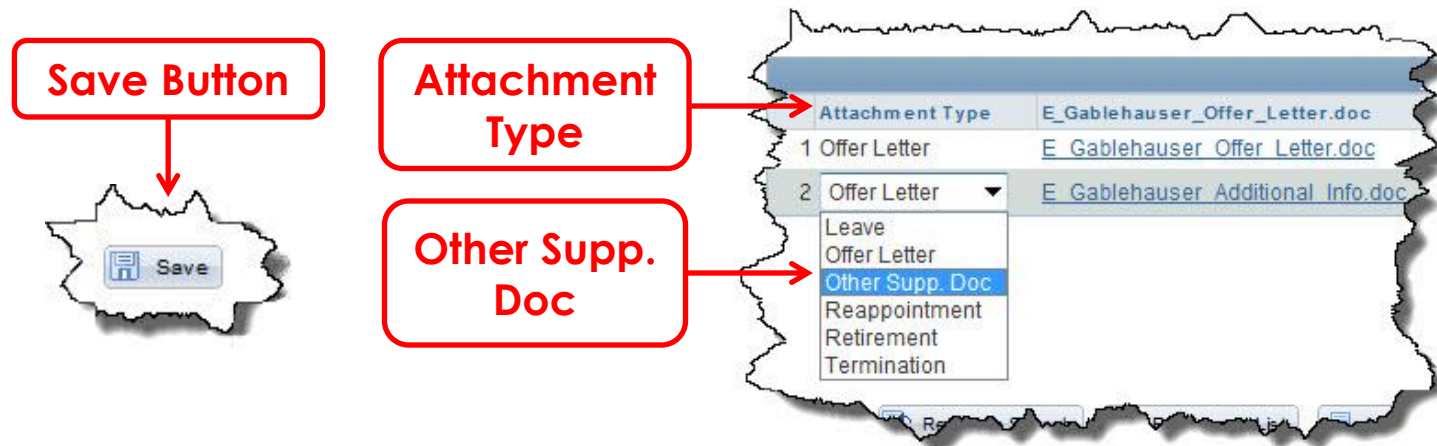


Attach Offer Letter

(continued)


8. Click on the “**Save**” button.

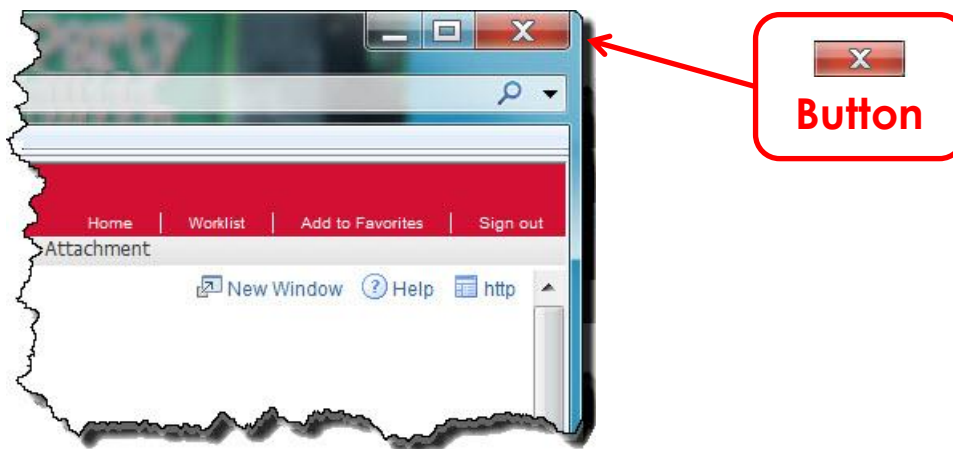
If you have additional documents to upload, click on the “**Add Attachment**” button again, and repeat steps 5 through 7. Select “**Other Supp. Doc**” from the “**Attachment Type**” drop-down list, then click on “**Save**” again. Repeat as many times as needed.



Attach Offer Letter

(continued)

- 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.



Note: 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)

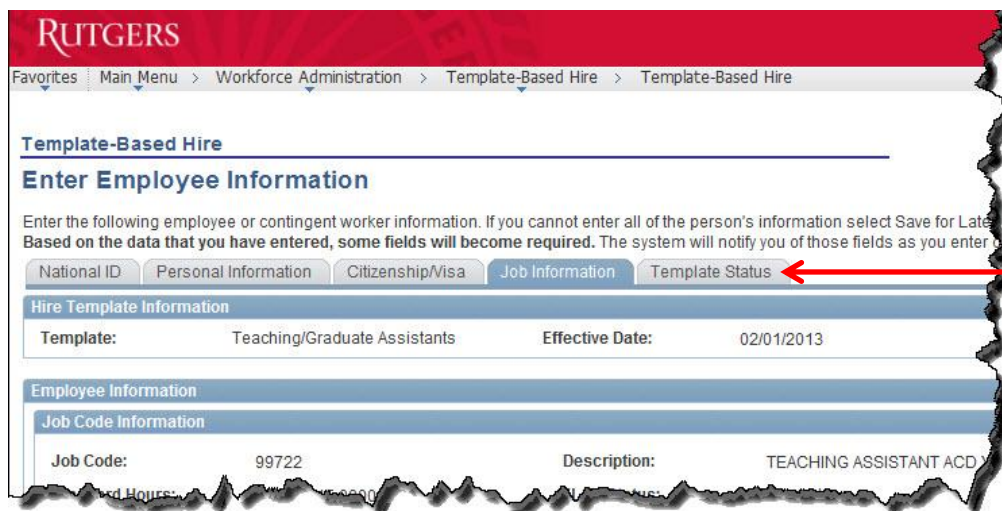
The following are examples of well-named Offer Letters:

- 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.



The screenshot shows the Rutgers HR system interface. At the top is the Rutgers logo. Below it is a breadcrumb trail: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The main heading is 'Template-Based Hire' followed by 'Enter Employee Information'. A sub-heading reads: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter.' Below this are five tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The 'Template Status' tab is highlighted with a red arrow pointing to it from a red box on the right. Below the tabs are three sections: 'Hire Template Information' with fields for 'Template:' (Teaching/Graduate Assistants) and 'Effective Date:' (02/01/2013); 'Employee Information' with a sub-section 'Job Code Information' containing 'Job Code:' (99722) and 'Description:' (TEACHING ASSISTANT ACD); and a partially visible 'Work Hours' section at the bottom.

**Template Status
Tab**

Template Status Tab (continued)

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

The screenshot shows the 'Template-Based Hire' form in the Rutgers HR system. The form is titled 'Enter Employee Information' and includes tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'Template Status' tab is active, showing fields for 'Template' (Teaching/Graduate Assistants), 'Effective Date' (02/01/2013), and '*Template Complete' (Yes). Below these fields is a 'Comments' section with a text area. Red callout boxes with arrows point to the 'Template Status' tab, the '*Template Complete' dropdown menu, and the 'Comments' text area.

Template Status

Template Complete = Yes

Comments Box

Template Status Tab (continued)

- Click on the **“Save and Submit”** button to send the transaction to the Approver for review.

The screenshot shows the Rutgers HR system interface for the 'Template-Based Hire' process. The 'Template Status' tab is active. The form includes sections for 'Hire Template Information' (Template: Teaching/Graduate Assistants, Effective Date: 02/01/2013), 'Employee Information' (Template Status: Yes), and a 'Comments' section. At the bottom, there are buttons for 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A red callout box with the text 'Save and Submit Button' points to the 'Save and Submit' button.

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:

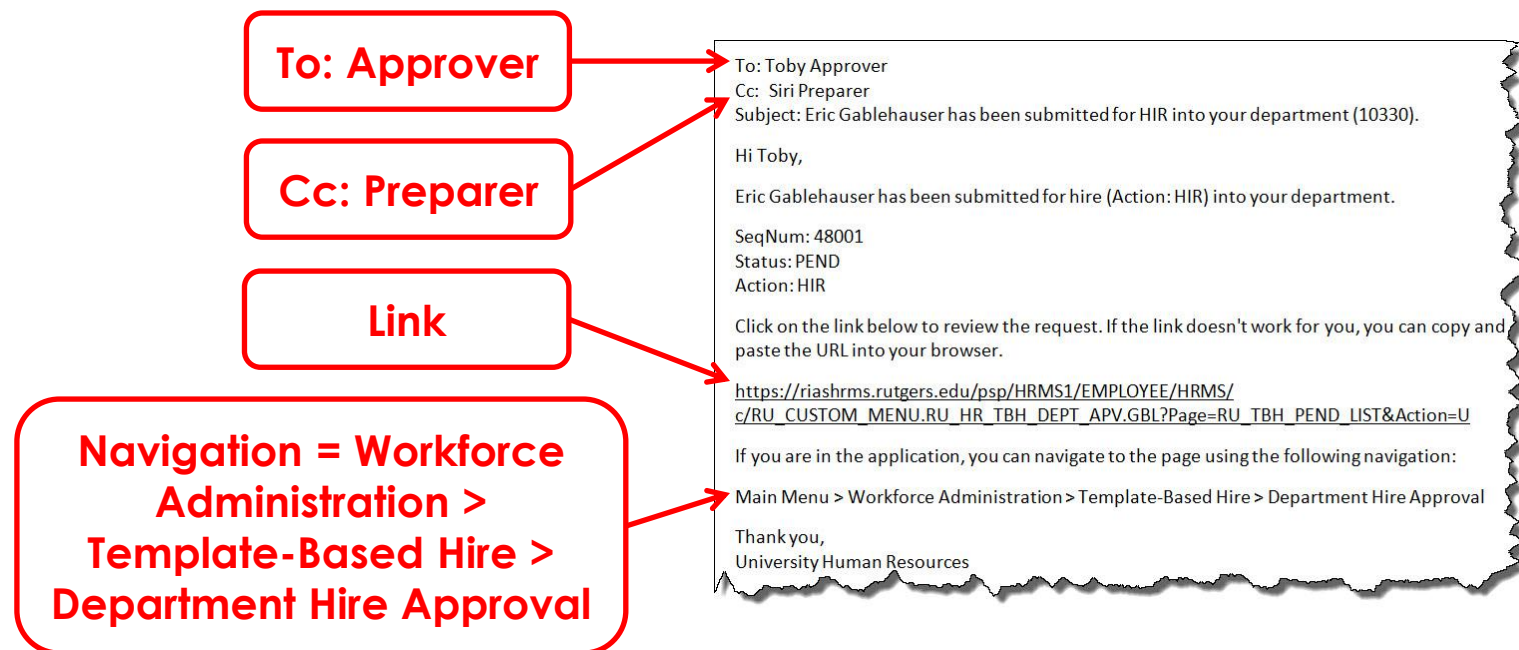
Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

Thank you,
University Human Resources

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.



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.

Pending Approval

Please click on the name of the pending hire that needs to be approved.

Department	Department Name	Name	Type of Hire	Start Date	Action	Country
10330	SAS - English	Howard Wolowitz	Employee	01/01/2013	Hire	United States
10330	SAS - English	Bernadette Rostenkowski	Employee	04/22/2013	Hire	United States

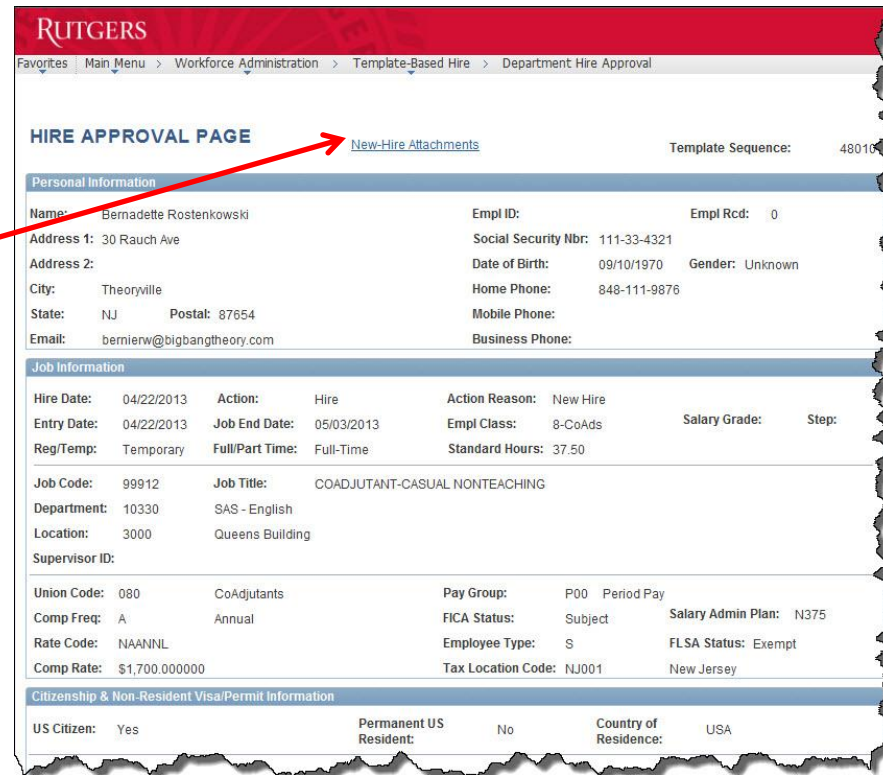
Name Column

Link to View TBH

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



The screenshot shows the 'HIRE APPROVAL PAGE' for a new hire. A red arrow points from the 'New Hire Attachments Link' text to the 'New Hire Attachments' link on the page. The page displays personal information, job information, and citizenship details for a new hire named Bernadette Rostenkowski.

HIRE APPROVAL PAGE			
New Hire Attachments			Template Sequence: 48010
Personal Information			
Name:	Bernadette Rostenkowski	Empl ID:	Empl Rcd: 0
Address 1:	30 Rauch Ave	Social Security Nbr:	111-33-4321
Address 2:		Date of Birth:	09/10/1970 Gender: Unknown
City:	Theoryville	Home Phone:	848-111-9876
State:	NJ Postal: 87654	Mobile Phone:	
Email:	bernierw@bigbangtheory.com	Business Phone:	
Job Information			
Hire Date:	04/22/2013	Action:	Hire
Entry Date:	04/22/2013	Job End Date:	05/03/2013
Reg/Temp:	Temporary	Full/Part Time:	Full-Time
Job Code:	99912	Job Title:	COADJUTANT-CASUAL NONTEACHING
Department:	10330		SAS - English
Location:	3000		Queens Building
Supervisor ID:			
Union Code:	080	CoAdjutants:	Annual
Comp Freq:	A	Pay Group:	P00 Period Pay
Rate Code:	NAANNL	FICA Status:	Subject
Comp Rate:	\$1,700.000000	Employee Type:	S
		Salary Admin Plan:	N375
		FLSA Status:	Exempt
		Tax Location Code:	NJ001 New Jersey
Citizenship & Non-Resident Visa/Permit Information			
US Citizen:	Yes	Permanent US Resident:	No
		Country of Residence:	USA

Dept. Approver - Review and Approval (continued)

- 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.

RUTGERS

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

Template Based Hire Attachment

Empl ID: 10330 Empl Record: 0 Bernadette Rostenkowski
Department: 10330 SAS - English
Job Code: 99912 COADJUTANT-CASUAL NONTEACHING

Add Attachment

Note: File name must be less than 65 characters

Attachment Type	B_Rostenkowski-Wolowitz_Offer_Letter_4_22_13.pdf	Updated By	Last Update Date/Time
1 Offer Letter	B_Rostenkowski-Wolowitz_Offer_Letter_4_22_13.pdf	WXYZ	04/22/13 2:48:59PM

OK Cancel Apply

**Attachment Type =
Offer Letter**

**Link to Open Offer
Letter**

Dept. Approver - Review and Approval (continued)

- 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	Empl ID: 111-33-4321	Empl Rcd: 0
Address 1: 30 Rauch Ave	Social Security Nbr: 09/10/1970	Gender: Unknown
Address 2:	Home Phone: 848-111-9876	
City: Theoryville	Mobile Phone:	
State: NJ Postal: 07654	Business Phone:	
Email: berniew@bigbangtheory.com		

Job Information

Hire Date: 04/22/2013	Action: Hire	Action Reason: New Hire	Salary Grade: Step:
Entry Date: 04/22/2013	Job End Date: 05/03/2013	Empl Class: 8-CoAds	
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	Salary Admin Plan: N375
Comp Freq: A	Annual	FICA Status: Subject	Employee Type: S	FLSA Status: Exempt
Rate Code: NAAHNL		Tax Location Code: NJ001	New Jersey	
Comp Rate: \$1,700.000000				

Citizenship & Non-Resident Visa/Permit Information

US Citizen: Yes	Permanent US Resident: No	Country of Residence: USA
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Hire Approval Page

Opened Offer Letter

RUTGERS
Center for Management Development
www.XYZ.rutgers.edu
info@XYZ.rutgers.edu

Center for Management Development
SAS - English
Rutgers, The State University of New Jersey
1 Campus Way
Piscataway, NJ 08854-8098
732-445-1234
Fax: 732-445-5678

April 1, 2012

Re: Offer Letter

Dear Ms. Rostenkowski,

This letter confirms your 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 to the attention of my assistant, Rosemary New, at the address above.

Dept. Approver - Review and Approval (continued)

- 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.

The screenshot shows a form titled "Citizenship & Non-Resident Visa/Permit Information". It includes fields for "Comp Rate" (\$5,000.000000), "Tax Location Code", "US Citizen" (Yes), "Permanent US Resident" (No), "Visa/Permit Type", "Date of Entry into Country", "Visa/Permit Status", and "Status Date". A "Comments" box contains the text: "Siri, please chane the salary to match the amount shown in the offer letter. Thanks, Toby". At the bottom are two buttons: "Approve" and "Return to Dept Preparer".

Annotations with red arrows point to the following elements:

- Comments Box**: Points to the "Comments" text area.
- Approve Button**: Points to the "Approve" button.
- Return to Dept Preparer Button**: Points to the "Return to Dept Preparer" button.

Dept. Approver - Review and Approval (continued)

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



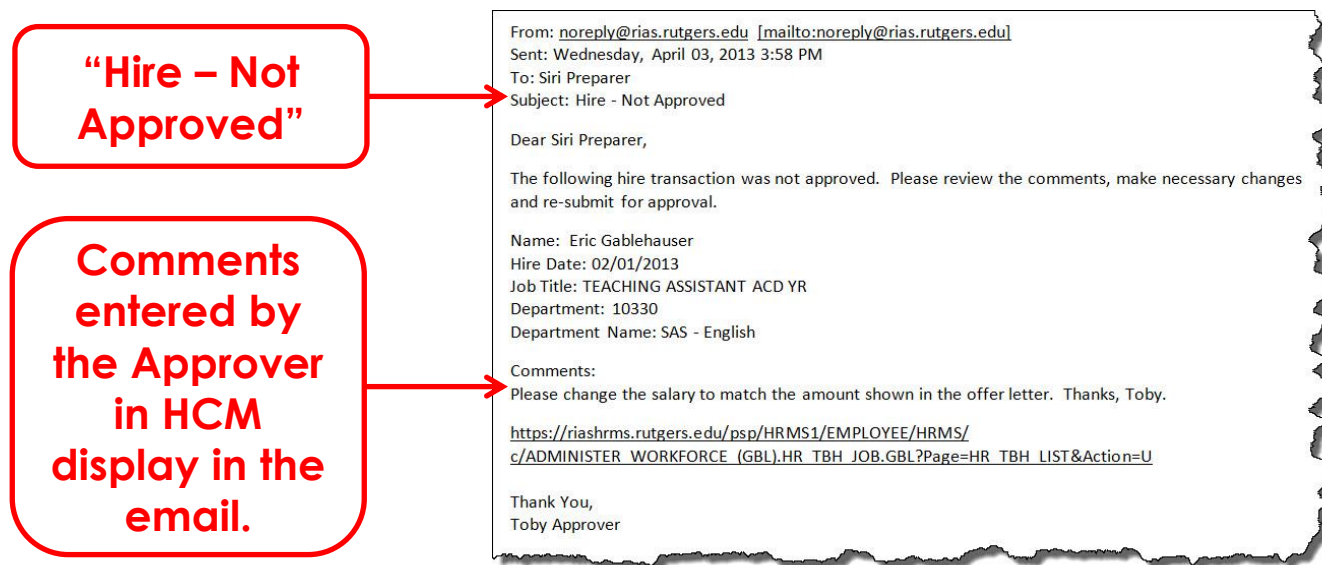
If you returned the TBH to the Preparer, you will see the “**Hire Not Approved Confirmation**” screen.



6. Click on the “**OK**” button.

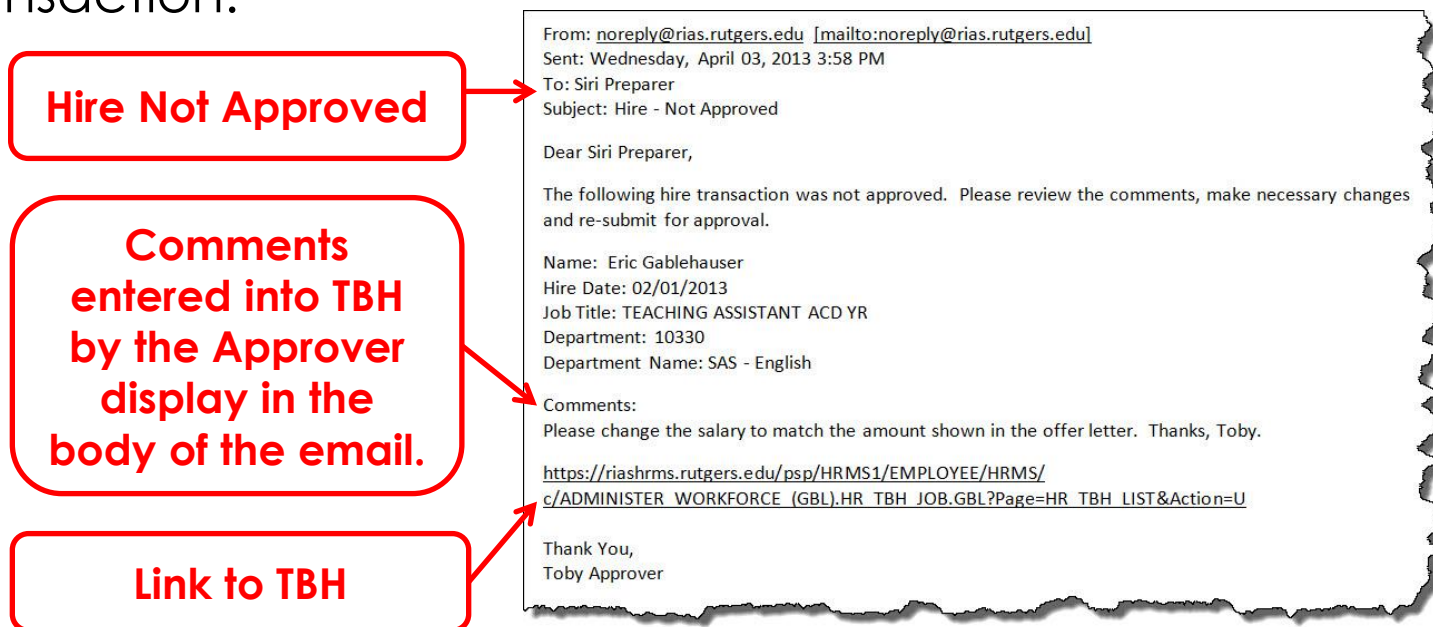
Not Approved Email

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.



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.



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.**

The screenshot shows the Rutgers HR system interface for a Template-Based Hire. The page title is 'Template-Based Hire' and the sub-header is 'Enter Employee Information'. Below this, there are tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'Hire Template Information' section shows 'Template: Additional Coad Job' and 'Effective Date: 04/22/2013'. The 'Employee Information' section shows 'Social Security Number' and 'National ID: 111334321'. The 'Comments' section has a text area with the following content: '4/23/13 - Siri, please correct the Job Code. According to the offer letter, it should be 99912. Thanks, Toby' and '4/24/13 - Toby, the job code was changed as requested. - Siri'. At the bottom, there are buttons for 'Edit Hire Details', 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A note at the bottom left indicates '* Required Field'.

Changes After Approver Review (continued)

- 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.

The screenshot shows the 'Template-Based Hire' form in the Rutgers Workforce Administration system. The form is titled 'Enter Employee Information' and includes tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'Template Status' tab is active, showing a 'Template Complete' dropdown menu with options 'Yes', 'No', and 'Yes'. A red arrow points from the 'Template Status Tab' label to the 'Template Status' tab. Another red arrow points from the 'Blank Area' label to the blank area in the dropdown menu. A third red arrow points from the 'Active Save and Submit Button' label to the 'Save and Submit' button at the bottom of the form. The form also includes a 'Comments' section with a text area containing the text: '4/23/13 - Siri, please correct the Job Code. According to the offer letter, it should be 99912. Thanks, Toby 4/23/13 - Toby, I changed the job code as requested. - Siri'. The 'Save and Submit' button is highlighted in blue.

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](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 contract 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.

The screenshot shows the 'Template Hire Status' screen with the following sections and annotations:

- Navigation:** An arrow points to the breadcrumb trail: `Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire Status`.
- Pending Hires:** An arrow points to the 'Pending Hires' section header.
- Cancelled Hires:** An arrow points to the 'Cancelled Hires' section header.
- Processed Hires:** An arrow points to the 'Processed Hires' section header.
- Dept Approver has to approve:** An arrow points to the 'Status' column in the Pending Hires table, specifically to the value 'Pending Dept Approval'.
- “Requested” or “Action Required” (not shown) means HCM or ALR has to process:** An arrow points to the 'Status' column in the Pending Hires table, specifically to the value 'Requested'.

Name	Type of Hire	Start Date	Action	Country	Status	Person ID
Stephanie Barnett	Employee	04/10/2013	Hire	United States	Pending Dept Approval	NEW
Sheldon Cooper	Employee	04/09/2013	Hire	United States	Pending Dept Approval	NEW
Alex Jensen	Employee	02/01/2013	Hire	United States	Requested	NEW
Dennis Kim	Employee	07/01/2013	Hire	United States	Requested	NEW
Elizabeth Plimpton	Employee	04/02/2013	Hire	United States	Pending Dept Approval	NEW

Name	Type of Hire	Start Date	Action	Country	Status	Person ID
You do not have any cancelled hires.						

Select	Name	Type of Hire	Start Date	Action	Country	Person ID
<input type="checkbox"/>	Angela Paige	Employee	04/15/2013	Hire	United States	00047625
<input type="checkbox"/>	David Underhill	Employee	04/05/2013	Hire	United States	00047623

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.