

Template-Based Hires (TBH) – Training Guide

Visit the Human Resources Website for more information and training materials.

Template-Based Hires

Template-Based Hire, or TBH, is a function within People@Columbia (PAC) where new hire and rehire transactions are initiated electronically in the departments and schools through PAC Templates. A document attachment feature allows for the attachment of necessary documents and the electronic workflow allows for a paperless approval process.

The TBH transaction also includes the initial Salary Distribution and Additional Compensation payments known at the time of hire.

Access to TBH is targeted to employees at Columbia University who initiate and/or approve hiring transactions. The Human Resources Processing Center (HRPC) completes the hire/rehire transactions and creates the PAC record.

Overview

The PAC Template-Based Hires course is a web-based training course that provides you with information on how to complete employee and position data on page 1 of a hire/rehire template and how to complete the salary distribution (labor accounting) portion on page 2 of a hire/rehire template.

This course consists of the following activities.

- PAC Template-Based Hires Page 1 Web-Based Training Module – ***this training guide***
- PAC Template-Based Hires and Labor Accounting Web-Based Training Module. This module also has an associated knowledge assessment that must be successfully passed with a score of 90% or greater to gain access to the functionality. The training guide on how to complete page 2 is “Template-Based Hires and Labor Accounting”.

You can take the knowledge assessment 3 times. The highest grade is recorded. The Knowledge Assessment is available at the end of completing the modules.

Access

As a new user, there are several steps required to obtain access to TBH and the Labor Accounting system.

- 1) If you haven't already done so, complete the PAC Security Application to request your PAC role(s). Once the application has been approved, you will receive notifications on how to access and complete the training in the Enterprise Learning Management (ELM) System.
- 2) Complete the required training course(s) for the roles and submit the Knowledge Assessment at the end of the course.
- 3) You will receive an e-mail from PAC Security once your access is established.

Table of Contents

Template-Based Hires	1
Overview	1
Access	1
Introduction to Template-Based Hires	4
The Benefit of Online Hire Transactions	4
Getting Started Using TBH	5
Access Template-Based Hire Function	5
The TBH Templates	6
Faculty Appointments Key Points	7
Hiring Types not using TBH Templates	8
Template-Based Hire Transactions Workflow	9
Using the Payroll Calendar	11
TBH Roles and Actions	12
Prepare to Enter a TBH Transaction	15
Obtain the Position Number	20
Check Your Understanding: Getting Started Using TBH	21
Submit a New Hire in TBH - The Initiator Role	23
The TBH TalentLink Integration Process	24
Select a Template	25
Enter Employee Information	27
Social Security Number	29
Primary Name	30
Phone Numbers	35
Gender, Birth Date and Marital Status	36
Citizenship and Visa Status	37
Ethnicity / Race	38
Education Data	38
Tenure Data	42
Position Information	43
Complete University Title	45
Interdisciplinary Departments	46
Compensation Information - Salary Information Section	47
Compensation Information - Job Compensation Section	48
Compensation Information - Zero Salary and Zero Stipend Appointments	50
I-9 Validation	52
Affirmative Action	54
Attach Documents	55
Clinical Data Fields - For CUIMC Clinical Appointments	57
Appointment	60
Reciprocal Appointments - Cornell	60
Hospital Affiliation	61
Comment Section and Review Entry	63
Complete Financial Accounting Information on Page 2	64
Print the Template	64
Submit the Transaction	65
Initiator Notifications	65
Initiator Status Page	67
Additional Main Page Actions	68

Review a Hire Entry - The Approver Role _____	74
Approver Levels and Workflow _____	75
Access the Hire Transaction _____	75
Review the Hire Transaction Information _____	78
Access Electronic Documents _____	78
Confirm Template Data _____	79
Add a Comment (optional) _____	80
Review the Financial Accounting Information on Page 2 _____	80
1st Level Approver Actions _____	81
Approver Worklist Status Page _____	85
Subsequent Approver Reviews _____	85
Subsequent Approver Review Steps _____	87
Subsequent Level Approver Actions _____	87
Subsequent Level Approver Actions Diagram _____	89
Subsequent Level Approver Notifications _____	90
HRPC Review _____	91
Confirm the Employee is in PAC - Initiators _____	92
View Employee Personal Information _____	93
View Employee in a Personnel Action Report _____	95
Check Your Understanding: Review a Hire Entry - The Approver Role _____	96
The Rehire Template _____	99
What is a Rehire _____	99
The Initiator Role _____	100
Access the Rehire Template _____	100
Enter the Employee ID and Job Effective Date _____	102
Validate the Social Security Number and Employee ID for a Rehire _____	103
Confirm Update and Enter Employee Information _____	104
Additional Rehire Template Sections and Information _____	106
Attach Documents Add a Comment and Review Template _____	106
Complete the Financial Accounting Information _____	107
Submit the Template to an Approver _____	107
Review a Rehire Template - The Approver Role _____	107
Check Your Understanding: The Rehire Template _____	108
Course References _____	109

Introduction to Template-Based Hires

This is the Introduction to Template-Based Hires lesson of the Template-Based Hires Page 1 course. Upon completion of this lesson, you will be able to:

- Define Template-Based Hires
- Recall the benefits to using online hiring templates
- Describe the components and users of PAC

Estimated Time to Complete Lesson: 5 minutes

The Benefit of Online Hire Transactions

Using TBH provides multiple benefits.

Securely Enter Hire and Rehire Transactions:

- Allows departments to directly enter hire transactions into PAC
- Allows entry of the distribution of regular earnings which reduces dollars allocated to suspense
- Allows entry of additional compensation payments known at the time of hire

Electronic Document Attachment:

- Electronic document attachment eliminates the need for the routing and storage of confidential identifying paperwork
- This feature allows you to browse files on a computer or shared drive and "upload" them to the template

Electronic Workflow:

- The electronic workflow routes transactions based on pre-authorized security roles
- Several roles exist to support the distributed hire/rehire workflow:
 - 1) Initiators
 - 2) Approvers (1st, 2nd, and 3rd level)
 - 3) Foreign Funding Approvers
 - 4) Reviewer Role (for large central departments only)
 - 5) HRPC

University Goals and Strategy:

Online hire transactions allows the University to achieve much greater value and utilization from the PAC system and to provide accurate and secure employee information.

Getting Started Using TBH

This is the *Getting Started* lesson of the *Template-Based Hires Page 1* course. Upon completion of this lesson, you will be able to:

- Log on to and Sign Out of PAC/TBH
- Recall the TBH Templates and when a Paper Hire Form is Used
- Recall the Template-Based Hire Transaction Workflows and the required approval levels
- Using the Payroll Calendar, understand the relationship between the Initiated Date, Approved Date and Template-Based Hire Transactions
- Gather and Prepare Entry Data

Estimated Time to Complete Lesson: 15 minutes

Access Template-Based Hire Function

1. Navigate to the [myColumbia portal](#).
2. Log in with your UNI and Password
3. Click on the "HR Manager Resources" tab
4. Under the PAC Access section:
 - Click the "Go to PAC" link
5. The "Hire/Rehire Employee" page is located within the "Job and Personal Information" folder within the "Manager Self Service" folder

Access the *PAC Basics for Transactors* course for information on navigating PAC.

Sign Out of PAC/Template-Based Hire

Select the "Sign Out" option from within the three-dot menu icon located in the upper right-hand corner to log out of the system.

The TBH Templates

There is a specific template for each of the following types of employees you are hiring or rehiring.

- Academic Hire - Morningside
- Academic Hire - CUIMC
- Academic Rehire - Morningside
- Academic Rehire - CUIMC
- Administrative Hire - for CUIMC and Morningside
- Administrative Rehire - for CUIMC and Morningside

Academic hires include:

- Officers of Instruction
- Officers of Research
- Officers of the Libraries
- Student Officers

Administrative hires include:

- Officers of Administration (full-time and part-time)
- Support Staff employees (includes Casual Employees)

Faculty Appointments Key Points

Officers of Instruction:

1. All full-time faculty appointments must end on 6/30 unless the Affirmative Action clearance or visa expiration date prevents appointment to that date.
2. On the Morningside campus all part-time faculty appointments should run 9/1-5/31, 9/1-12/31, 1/1-5/31, or 6/1-8/31, depending on the department/school tradition unless the visa expiration date prevents such an appointment or unless the department/school offers classes for shorter periods of time.
3. Appointment end dates should not be extended beyond 6/30 simply because the visa expiration date is later. End dates are governed by the period of appointment, not driven by the visa expiration date if it is later than the appointment end date.
4. CUIMC - All part-time faculty appointments at CUIMC must end on 6/30 unless visa expiration date prevents appointment to that date or unless the person is only teaching for a specific period of time (9/1-12/31 or 1/1-5/31).

Officers of Research:

1. All appointments as officers of research cannot be longer than one year at a time unless the Affirmative Action clearance, the visa expiration date, or the grant funding prevents appointment for a full year. Ideally the appointment should end 6/30 but appointments are subject to availability of funding and should never extend beyond the date when current funding ends.
2. Postdoctoral appointments must not be put on a 6/30 cycle unless they start 7/1. The date the appointment started must be preserved to ensure that the individual does not hold an appointment for more than three years (or four or five years if extensions are granted by the Provost). The period of appointment as a Staff Associate counts in the three-year appointment period.
3. Other types of research appointments may be put on the 6/30 cycle if Affirmative Action clearance, funding, and the visa expiration date permit.

Hiring Types not using TBH Templates

There are certain employment instances where TBH is not used:

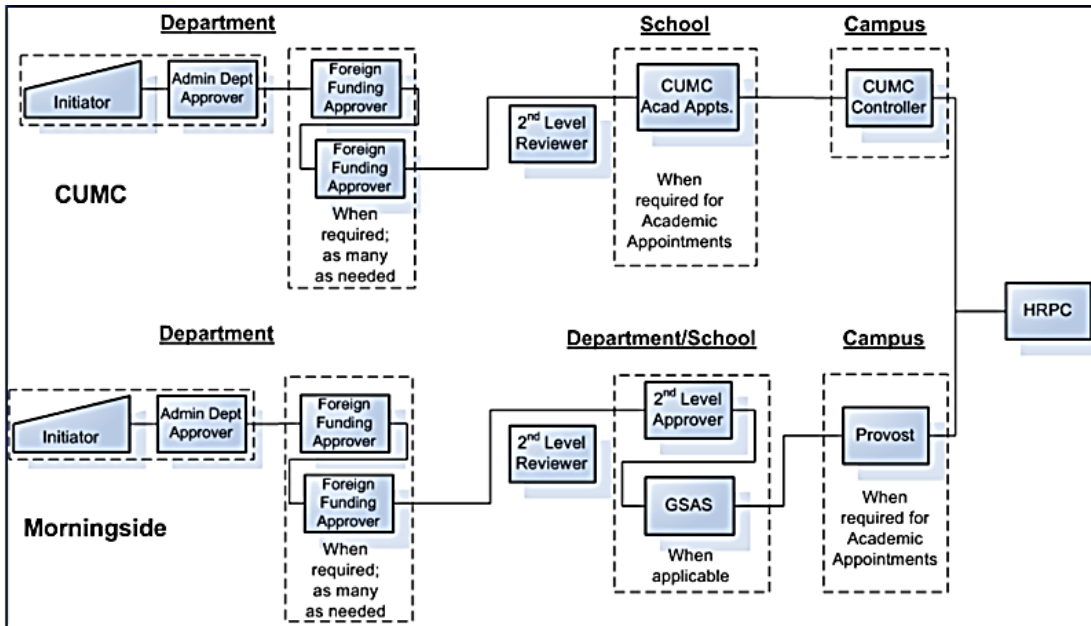
- Students who are Teaching Assistants (TAs), Departmental Research Assistants (DRAs) or Graduate Research Assistants (GRAs) who receive a stipend and have a Bursar/Financial Aid record in the Student Information Services (SIS) system. These students receive a PAC identity via the SIS feed which does not allow the TBH entry to be completed
- Students who are active in the Work Study system. These students receive a PAC identity via the Work Study feed which does not allow the TBH entry to be completed.
- Retirees who are active in the system and have a PAC identity which does not allow the TBH entry to be completed
- Personnel awaiting a Social Security Number (SSN)
- People being hired with multiple jobs/appointments or those being hired into an additional job
- Academic personnel with stipends (postdoctoral research fellows and postdoctoral clinical fellows)
- Academic personnel who are reappointed on rosters (as applicable when rosters are used)
- Academic personnel going on leave immediately upon hire

For these types of hires, submit a paper New Hire Personnel Action Form (PAF) for Administrative hires or a paper Nomination Form for Academic hires both accessible in the Forms Catalog.

Template-Based Hire Transactions Workflow

Each template has a specific workflow. A workflow is the routing of transactions based on rules. Workflow is used in PAC to route transactions for approval and processing. Within each workflow, there are multiple levels of approvers and transactions will "stop" at each level for review and approval as needed.

Below is a representation of the Hire Rehire workflow. This is the path a TBH transaction follows when submitted.



The Initiator gathers and enters information into the transaction pages. The transaction then moves to the approver(s) who review and approve the transaction. The Human Resources Processing Center (HRPC) is the final stop along the workflow and completes the hire process and adds the person into PAC. There are several levels of approvers in the Hire Rehire workflow. The number of approvers required to review and approve a transaction is determined by the type of hire and the funding department(s).

Earnings charged outside the admin department will be approved by the foreign funders. 2nd Level Approvers provide the next level of review. Academic transactions are approved by the Office of Faculty Affairs at CUMC or by the school or department at Morningside.

The Graduate School of Arts and Sciences approves all student officer appointments for the Arts and Sciences. Administrative transactions are approved by the Payroll Office at CUMC or by the school or department at Morningside. 3rd Level Approvers provide the final level of review. Academic transactions are approved by the Payroll Office at CUMC or by the Provost's Office at Morningside. There is no 3rd level approval required for administrative transactions.

Only the Initiator or 1st Approver in the admin department can make changes to a template. If any subsequent approver needs to make changes, he/she must recycle the transaction so the admin department 1st level approver can make the requested changes.

Workflow Roles and Access

Your role and approval level in the workflow is defined by the following factors:

1. Your PAC role, e.g. Manager Self-Service, TBH Initiator or Accounting Approver. Your role defines the pages you can access
2. Your Approval Authority, (e.g. Add Comp, Accounting, or TBH level 1, level 2, level 3). This authority defines the transactions you have permission to approve and at what point in the transaction
3. Your Departmental Access. The departments to which you have PAC access defines the employees for which you can initiate or approve transactions.
4. Required Training Completion. Each role/approval authority requires completion of the application training courses and satisfactorily passing the associated knowledge assessment(s) before access is granted

Obtaining Approver Access

Departments determine who the approvers are, at which level they can approve and for which type of transactions. As an approver, these factors determine the role and approval access request to make as well as the required training courses and knowledge assessments that must be completed. An individual may have both initiator and approver roles.

Additional information specific to the approver role can be found in the course, "The Approver Role".

Using the Payroll Calendar

Now that we reviewed workflow, let's review the relationship between the Initiated Date, Approved Date and Template-Based Hire Transactions.

The initiated date is system generated when the transaction is created. The transaction then goes to the 1st level home department for approval and then to any 1st level foreign department approvers if indicated by the combo codes entered (this is on page 2 of the template). Next, the transaction goes to the 2nd level approval, if needed, and then on the 3rd level, for final approval.

As per the CUMC or Morningside Payroll Calendar, if final approval of the template occurs in advance of the *PAF, Nomination Forms & TBH Date* listed for the pay period, the template will be routed to the HRPC for completion of the manage hire process and entry into PAC. The employee will receive a pay check as of the Check Date listed along with any retroactive pay due. The employee will also be assigned an employee ID and will be able to enroll in the Columbia University Benefits (as eligible).

If the template receives final approval after the *PAF, Nomination Forms & TBH Date* for a payroll, the template will be routed to the HRPC for completion of the manage hire process and entry into PAC, however, the employee will not receive pay until the following pay period.

Note the date for hire/rehire transactions to receive final approval, and thus received by HRPC, to ensure entry into PAC effective for that pay period.

Type of Payroll	Pay Run ID	Period Covered	PAF, Nomination Form & TBH HRPC Mail Closing Date	FFE Entry Period	Labor Accounting Add Comp		View on Web Date	Check Date
					Dept. Admin.	Final Approve		
Weekly	WKL-14-024	06/02/14 - 06/08/14	Mon 06/02/2014	06/04/14 - 06/09/14			06/11/14	06/13/2014
Biweekly	BWK-14-025	06/02/14 - 06/15/14	Mon 06/09/2014	06/11/14 - 06/16/14			06/18/14	06/20/2014
Weekly	BWK-14-025	06/09/14 - 06/15/14	Mon 06/09/2014	06/11/14 - 06/16/14			06/18/14	06/20/2014
Semi-Monthly	SMP-14-012	06/16/14 - 06/30/14	Mon 06/16/2014		Mon 06/16/2014	Fri 06/20/2014	06/25/14	06/30/2014
Stipend / Retiree	STR-14-007	07/01/14 - 07/31/14	Mon 06/16/2014				06/25/14	07/01/2014
Weekly	WKL-14-026	06/16/14 - 06/22/14	Mon 06/16/2014	06/18/14 - 06/23/14			06/25/14	06/27/2014

TBH Roles and Actions

As demonstrated in the workflow diagram, each role in the workflow process has a specific set of actions and steps that allow the user to enter, review and approve information and submit the transaction through the process.



The Initiator Role

An initiator is a user who enters a new hire or rehire transaction into PAC using the hire templates. An employee can only have one admin department although they may have multiple positions. Only the administrative (admin) department for the employee (the department that administers the employee's position), can initiate the hire/rehire. Some employees have a position department (where the position resides) that is different from the admin department. More on this in the next lesson.

An Initiator can save an incomplete transaction and return to update it prior to submitting it to the 1st Level Approver. This "Save for Later" feature allows an Initiator to begin a hire transaction while waiting for additional information.

An Initiator performs the following tasks when creating a hire or rehire transaction:

- Enters (or confirms/edits integrated data) all biographical (such as date of birth and gender), position and salary data
- Scans and attaches all relevant documents into the template
- Reviews and confirms all information entered
- Submits the transaction for approval to a 1st Level Approver

Initiators do not deny transactions. They can cancel a transaction and begin again. This is the equivalent to ripping up a sheet of paper and writing on a new sheet of paper.

Note: The "Save for Later" feature allows you to begin a transaction and complete it at a later time. This should be balanced, however, with the number of transactions that you have in draft status at one time. Only you have access to your draft queue and if you are out of the office, the transactions cannot be acted upon. A good practice is to gather all information prior to initiating the transaction and complete them upon entry.

The Approver Role

The approver role allows a user to approve transactions in PAC. There are several levels of approvers within each of the four labor accounting transactions: Hire/Rehire, Salary Distributions, Additional Compensation Payments and Cost Transfers. The number of approvers required to review and approve a transaction is determined by the type of transaction, the campus where the employee is located and if there are any foreign funders for the transaction.

Each approval level is a touch point in the electronic workflow where the approver reviews the transaction data, validates the information and then indicates their approval, denial, or if a change is needed.

Approvers provide a review of the transaction data and complete the approval by:

- Verifying that the hire is in line with the policies and procedures of the University
- Reviewing the data entered by the Administrative Department (and approved by prior approvers) to ensure it is complete and accurate
- Updating the form as needed. Note: Only 1st level approvers (and Initiators) in the administrative (home) department can make changes to a template. All subsequent approvers and reviewers can only add a comment to the template
- Confirming the required documents are attached

Approvers can take one of five actions on a transaction:

- **Approve** the transaction. This sends it forward in the workflow process to the next level approver or the HRPC
- **Deny** the transaction. This will void the transaction and make it inactive. The transaction is removed from the workflow and is no longer accessible. Transaction will need to be initiated again if denied in error
- **Recycle** the template back for correction or additional information. Note: 1st level approvers recycle a template to the Initiator, all subsequent approvers recycle a template back to the 1st level approver
- **Save** the transaction. Clicking the "Save" button saves any changes you make to a transaction. This feature allows you to change data and save those changes without leaving the page. Note: Only 1st level approvers (or Initiator) in the administrative (home) department can make changes to a template. All subsequent approvers and reviewers can only add a comment to the template
- **Quit Without Saving.** Clicking this button removes any data changes you made (1st level approvers (or Initiator) in the administrative (home) department) or comments added to the form (subsequent approvers) *since it was last saved*. Any information entered/documents attached or comments added, *from the last time it was saved*, will not be saved in the system. This action does not remove the transaction from the workflow; it simply brings you back to the form as it was when it was last saved

Note: Only the Initiator and 1st level approver in the employee's admin department can make changes to a hire/rehire template or a labor accounting transaction. If any subsequent approver needs to make changes, he/she must recycle the transaction so the admin department 1st level approver (or initiator) can make the requested change.

Approval Levels

Multiple approval levels allow for additional data review and validation of information for completeness and accuracy.

- 1st level approvers in the home (admin) department provide the 1st level of review and approval
- 1st level approvers in foreign departments provide the next level of review and approval (if earnings are charged outside the admin department)
- 2nd level approvers (school/department level) provide the next level of review and approval. (The Graduate School of Arts and Sciences approves all student officer appointments (Morningside only))
- 3rd level approvers (campus level) provide the final level of review and approval

Note:

All hire transactions should have at least two different individuals approve the transaction. Therefore, you may act upon a transaction as a level 1 **or** level 2 approver but **not both**

HRPC and the Manage Hire Process

HRPC is the Human Resources Processing Center and an HRPC team member can add an employee's personal, job and tax record into the PAC system. They are the final step to adding a new hire is to perform the manage hire process. All of the entries into the system up to this point have been done in an electronic template (form). This information is saved on staging tables within the system. The employee is not actually added to the PAC system until HRPC completes the Manage Hire Process.

HRPC performs the following actions on a hire transaction:

- **Reviews** the transaction data for completeness
- **Completes** the transaction by: adding the personal and job record to PAC and creating the tax set-up for the employee
- **Recycles** the transaction. This action returns the transaction to the 1st level approver if updates are needed
- **Deny** the transaction. This action denies a transaction and makes it inactive. Note: it is rare that HRPC will deny a transaction and will consult with a level 3 approver prior to denial

An employee is added to the PAC system once you are able to access their information in MSS (if you hold the Manager Self-Service role). You will also know via the Status Page which we will review later in the course.

Prepare to Enter a TBH Transaction

Before you begin entering the employee information into the template, or review the information in the draft template created by the TalentLink TBH integration for administrative hires and rehires, it is beneficial to complete the following steps as you will have all pertinent data readily available and you will not need to stop the entry process.

1. **Gather the required documents** from which you will enter the person's information
2. **Scan the documents** into a secured shared drive or encrypted local drive
3. **Determine if the hire was a previous employee at the University.** If so, obtain the Employee ID. For Rehires, you will use the Rehire template
4. **Obtain the position number** for the hire

Additional Points to Note:

- Follow your current process to perform these steps. The information gathered from these steps determines which template is chosen and the data that is entered into the template
- It is important to select the correct template at the initial selection because once data is saved into a template, it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template

Gather Required Documents

A first step to entering hire information into the electronic template is to gather the employee documentation that contains the information that you will enter into the data fields.

Attaching documents electronically eliminates the need to send paper documents between offices. You can attach as many documents as needed to an employee's template-based hire form.

Each hire type may require slightly different information and documentation to approve a transaction. Below are examples of some of these items. For a complete list of items, the categories they are placed and the order in which they are attached, reference the *Attaching Documents* Job Aid located on the HR Website.

- Curriculum vitae (CV) for Faculty, Officers of Research, Officers of the Libraries. Not needed for Student Officers
- Signed Offer Letter (not needed for Student Officers)
- Chairman's Letter - CUMC Academic only
- W4 Form
- IT 2104 or 2104.1 or 2104.E
- NYS 195(1) Form
- Invention Agreement - Academic (as needed)
- Financial/Accounting Information (note - this information is not attached to the template in a document but necessary to complete page 2 of the entry)

Required Documents

Group all applicable documents into the appropriate categories and scan and attach them to the template.

The “[Attaching Documents in Template-Based Hire \(TBH\) Job Aid](#)” provides a list of required documents per hire type.

For instructions on how to download documents from TalentLink for administrative hires to attach to the template, refer to the “[How to Obtain and Attach Hiring Documents to a TBH or PAF](#)”. Once the pdf of documents from TalentLink is created and saved, it can be attached to the TBH. All other hiring documents not within TalentLink, such as the NYS 195, tax forms, etc. are still required attachments.

Scan Documents

To be able to attach documents to a template, they must first be scanned into a secure shared drive or encrypted local drive.

1. Locate the scanner for your department or school
2. Locate the secure shared drive or encrypted local drive where scanned documents are kept for your department or school
3. Group paper documents into category types. Every document is placed into a category within the document attachment feature. All documents in one category are scanned together and saved as one file. Doing this allows you to attach one file to one category. The one file may contain several documents
4. Scan the documents into a secured shared drive or encrypted local drive
5. Clearly label the document group for easy identification. Example: R.Jones_Academic Appointments Hiring Documents

Notes:

- For Morningside Academic Hires/Rehires, follow the attachment guidelines listed on the previous page
- For CUMC academic hires/rehires and administrative hires/rehires, Follow your department/school/campus current format on the order and groupings to attach documents
- Attach files in '.pdf' format. PDF documents are more stable and take up less electronic storage space
- If you receive a document via e-mail and save it to a secure drive, you can attach the document without scanning it first - since it is already saved electronically
- Documents with foreign wording can be scanned and saved as PDF file. This will preserve the formatting and ensure that words will not be converted to symbols
- Documents should not be e-mailed as they contain sensitive employee information

Reference the [Attaching Documents Job Aid](#) located on the HR Website for a full list of documents.

What to do with Original Documents once Scanned

Original documents and scanned copies should be kept in the department for 3 - 4 months after confirming the person is hired into the PAC system. Please note all attached TBH documents are retained in PAC indefinitely and copies of any submitted document can be obtained through a request to the HRPC.

Determine if Employee is a Rehire - Select the Correct Template

Determining if an employee is a rehire is an important step in the process as the initial template selection is specific to a hire or rehire as well as the campus (for Academic Hires). Data that is saved into one template cannot be transferred into another template. You would need to begin the transaction again, entering the data in the correct template.

If the Employee is a Rehire

If the employee is a rehire, obtain the Employee ID as you will need to enter it into the rehire template. Entering the Employee ID pulls some of the existing personal and job data into the template, thus eliminating the need to re-enter all data. You will need to validate the information that appears to confirm that it is still accurate per the source documents you obtained.

How to determine if the Employee is a Rehire and Obtain the Employee ID

There are several ways to determine if a person was previously employed at Columbia University and confirm a match for the Social Security Number as well as obtain the Employee ID.

- 1) Review the hiring paperwork that lists prior employers, to determine if worked at Columbia University.
 - If the person was in your department you can locate the Employee ID using Manager Self Service (MSS). This feature is only available for employees in your department(s) as you cannot see information for employees outside of your department(s). This feature also requires you have access to MSS. If you do not, you can ask the person in your department who does have access to perform the search
 - If the person was not in your department, contact the department where the person worked prior to locate the Employee ID in MSS
- 2) There is also a Social Security Number (SSN) check built into the templates that will search the database for a match. Be sure to enter a valid 9 digit number. If not, an error message will appear saying that this is not a valid SSN and to check it and try again.

Within the new hire templates:

- Enter the Social Security Number for the rehire into the Social Security Number field and then tab out of the field or click "save for later". This will search the database and return to you one of the following results.
- If there is a match and this SSN is currently in use by a Columbia University employee, an error message will appear saying this SSN is already in use for an employee and will provide the Employee ID. If you receive this message, check that you entered the correct SSN, or take note of the EMPL ID to be used in the rehire template
- If there is not a match for the person with this SSN and the person was not previously employed at the University, again, check that the number is correct and if the person is a rehire, continue entry into the new hire template

Within the rehire templates:

- Enter the Social Security Number on the rehire template and the search will additionally check the SSN against the EMPL ID. If they do not match for the person, you will receive an error message asking you to check the SSN and EMPL ID

If you are experiencing difficulty determining if the person was previously employed at the University or obtaining the Employee ID, contact the HR Service Center.

Obtain the Position Number

The position number indicates the job you are filling. A position number indicates various attributes of the job including: full-time/part-time, grade, department, etc. You must enter the position number in the template, and this in turn determines the routing of the template for approval. **Note:** If needed, routing of a template can be changed and we will discuss this later in the course.

Obtain a Position Number for an Existing Position

If this is an existing position, the position number was already created and can be located on the Active Position report. Access the HR Data Reports suite of reports, from the HR Manager Resources link in myColumbia and Run the "Active Position" report for your department from the HR Data Reports suite of reports. This report lists all active positions and their associated position numbers in your department. The MSS or Management Reporter role is required to run the HR Data Reports. If you do not have one of these roles, you can obtain this data from the person in your department who has this access and can provide the report to you.

Note: The Job Description in TalentLink or the Requisition section of the job listing in Recruitment of Academic Personnel System (RAPS) should also include the position number.

Obtain a Position Number for a New Position

Administrative Positions

If this is a new position, the position number should be requested through TalentLink (the University's administrative recruitment system) when creating a job description. Central Human Resources will create the position number and add it to the job description in TalentLink.

If you initiated the job description, you will receive a notification that the job description has been approved, which means a position number has been added to the job description. Once you receive the approval notification, go to your job description to review the position number.

Note: For most cases, new position numbers must be created in TalentLink. If a position number needs to be created outside of TalentLink, contact your Client Manager.

Reference the *How to Create a New Job Description Without a Position Number* job aid on the [HR Website](#) for more information on creating position numbers in TalentLink.

See the TBH TalentLink Integration Process section for information on how hire/rehire templates are created for administrative hires.

Academic Positions

Contact the Provost Office (Morningside) or Faculty Affairs (CUIMC) to obtain the position number.

Check Your Understanding: Getting Started Using TBH

Let's review the topics covered. Fill in the Blanks/Short Answer/Post Lesson Activity:

1. _____ is a function within People@Columbia (PAC) where new hire and rehire transactions are initiated electronically in the departments and schools through PAC Templates. A document attachment feature allows for the attachment of necessary documents and the electronic workflow allows for a paperless approval process.
2. Each template has a specific _____ which is the routing of transactions based on rules and is used in PAC to obtain approvals and route transactions.
3. Your role and approval level in the workflow is defined by the following factors:
 - i. Your _____ role, e.g. Manager Self-Service, TBH Initiator or Accounting Level 1 Approver. Your role defines the pages you can access
 - ii. Your _____ Authority, (e.g. Add Comp, Accounting, or TBH level 1, level 2, level 3). This authority defines the transactions you have permission to approve and at what point in the transaction
 - iii. Your _____ Access. The departments to which you have PAC access defines the employees for which you can initiate or approve transactions
 - iv. Required _____ Completion. Each role/approval authority requires completion of the applicable training courses and satisfactorily passing the associated knowledge assessment(s) before access is granted
4. What department finalizes the hire process and adds the employee into PAC? _____.
5. Only the _____ or _____ can make changes to a hire/rehire template or a labor accounting transaction. If any subsequent approver needs to make changes, he/she must recycle the transaction back here to make the requested change.
6. If a department is missing an approval level within the workflow, can the template be completed electronically? ____
7. Where can you locate the final approval date needed for a template to be completed for a pay period? _____.
8. What four things can you do to help facilitate a template-based hire entry? _____.

Answers to these questions can be found in the following section.

Post Course Activity:

Discuss the following with your supervisor/manager:

1. What is/are your role(s) in processing hire and rehire transactions?
2. Who are the 1st, 2nd and 3rd level approvers for your Department/School?

Answer Key: Getting Started Using TBH

Below are the answers to the Check Your Understanding: Getting Started Using TBH questions:

1. **Template-Based Hire** is a function within People@Columbia (PAC) where new hire and rehire transactions are initiated electronically in the departments and schools through PAC Templates. A document attachment feature allows for the attachment of necessary documents and the electronic workflow allows for a paperless approval process.
2. Each template has a specific **workflow** which is the routing of transactions based on rules and is used in PAC to obtain approvals and route transactions.
3. Your role and approval level in the workflow is defined by the following factors:
 - i. Your **PAC** role, e.g. Manager Self-Service, TBH Initiator or Accounting Level 1 Approver. Your role defines the pages you can access
 - ii. Your **Approval** Authority, (e.g. Add Comp, Accounting, or TBH level 1, level 2, level 3). This authority defines the transactions you have permission to approve and at what point in the transaction
 - iii. Your **Departmental** Access. The departments to which you have PAC access defines the employees for which you can initiate or approve transactions
 - iv. Required **Training** Completion. Each role/approval authority requires completion of the applicable training courses and satisfactorily passing the associated knowledge assessment(s) before access is granted
4. What department finalizes the hire process and adds the employee into PAC? **The Human Resources Processing Center (HRPC).**
5. Only the **1st level approver(s) or Initiator(s) in the Admin Department** can make changes to a hire/rehire template or a labor accounting transaction. If any subsequent approver needs to make changes, he/she must recycle the transaction back here to make the requested change.
6. If a department is missing an approval level within the workflow, can the template be completed electronically? **No, there must be a complete workflow to electronically process TBH transactions.**
7. Where can you locate the final approval date needed for a template to be completed for a pay period? **The Payroll Calendar.**
8. What four things can you do to help facilitate a template-based hire entry?
 1. **Gather the required documents** from which you will enter the person's information
 2. **Scan the documents** into a secured shared drive or encrypted local drive
 3. **Determine if the hire was a previous employee at the University.** If so, obtain the Employee ID. For Rehires, you will use the Rehire template
 4. **Obtain the position number** for the hire

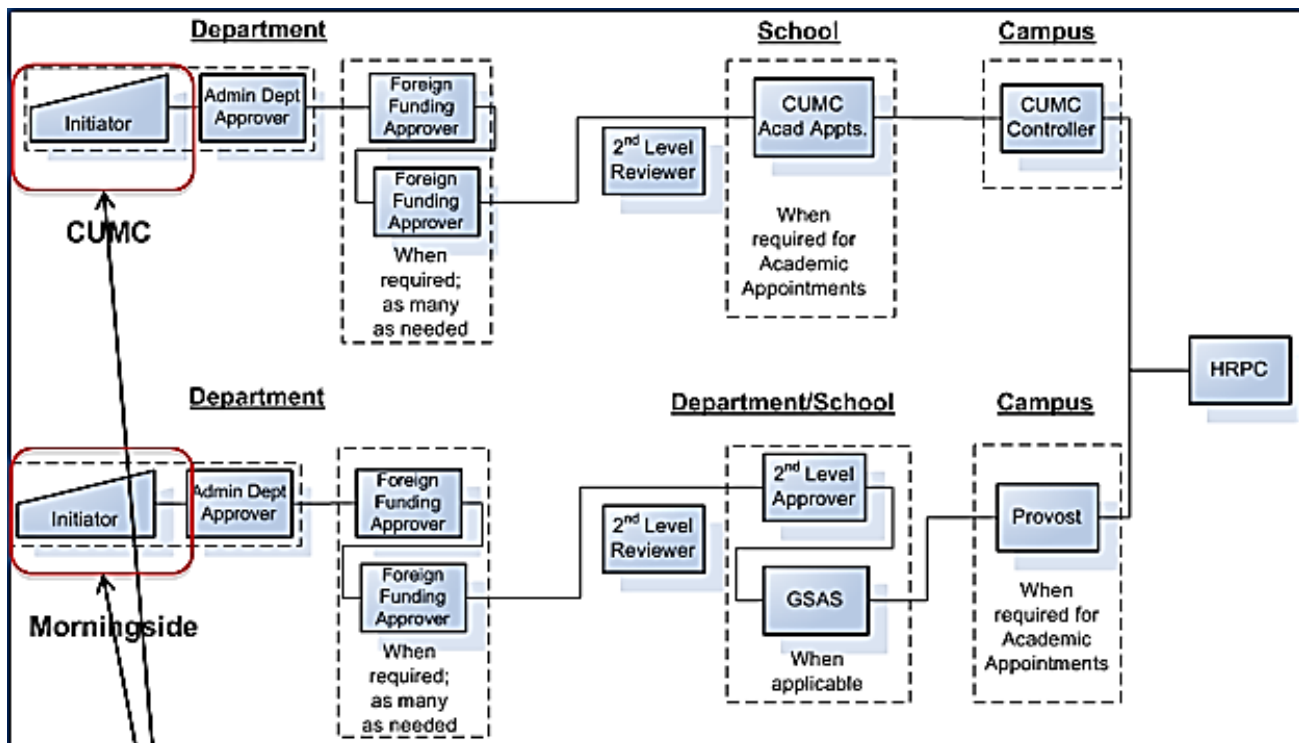
Submit a New Hire in TBH - The Initiator Role

This is the *Enter a New Hire into Template-Based Hire* lesson of the *Template-Based Hires Page 1* course. Upon completion of this lesson, you will be able to:

- Submit a new hire into Template-Based Hire
- Attach and access documents for a hire transaction

Note: This lesson contains a group of topics, "Clinical Data Fields - for CUIMC Clinical Appointments" which teach how to complete fields specific to CUIMC Clinical Hires. If you do not process CUIMC Clinical Hires, please skip this group of topics.

Estimated Time to Complete Lesson: 50 minutes (not including the CUIMC Clinical topics / 70 minutes (including the CUIMC Clinical topics)



We are here in the workflow. The Initiator:

- gathers and enters information into the transaction pages
- attaches the required documents to the transaction
- reviews the entry before submitting it into the workflow.

The TBH TalentLink Integration Process

The integration between TalentLink and TBH creates draft hire/rehire templates for administrative hires (officers of administration and support staff) and placing those drafts in PAC. Therefore, you select the draft template rather than creating a new one.

On a nightly basis, TalentLink will send data from TalentLink to PAC for each external applicant whose application status has been changed to “Hired/Initiate Onboarding” that day. The integration process will combine the data the applicant entered into the New Hire Form, and the position and salary data from TalentLink, and create a draft hire/rehire template accessible from the “Hire/Rehire Employee” page in PAC.

When an applicant’s status in TalentLink is changed to “Hired/Initiate Onboarding”, a process will run overnight to create a draft template in PAC. The draft template can then be accessed and completed by any of the initiators in the hiring department. For example, if the status is changed on Thursday, the TBH draft is available on Friday.

Please Note: if you create a TBH transaction directly in PAC, and then the new hire’s status in TalentLink is changed to “Hired/Initiate Onboarding”, you will have a duplicate transaction in PAC. Please coordinate with the TalentLink users in your school/department to ensure you do not have duplicate transactions. After completing the TBH and submitting the transaction into workflow, if you still have another draft TBH in your queue for the same person, you can delete it.

Tips and Key Points

- The draft TBH will appear in all initiator queues for the hiring department, similar to the way all approval transactions appear in the Worklist. The first person to access the template and save it will be the only one who then sees it on their page and can submit it.
- Deleting a TalentLink-created template removes it from all initiators’ queues and cannot be retrieved. If this happens, a new template will need to be created by the initiator. (Note the exclusion for duplicate transactions above).
- This process is for external hires and rehires only. Internal hires (transfers) are not processed via TBH.
- As an HR User responsible for managing the TalentLink application, once you change the status for an external administrative hire to “Hired/Initiate Onboarding”, it is helpful to check in PAC the following day to see that the draft template appears. Note that documents do not import from TalentLink into PAC and there are also additional documents not in TalentLink required. Please coordinate with the initiator(s) in your department to confirm the draft is there and that all documents are gathered for hire/rehire.

Where Can I Access Training Materials?

Please review the [PAC TBH TalentLink Integration Web-Based Training Module](#) video, available on the TalentLink page of the CUHR Website.

Where Do I Go If I Have Questions?

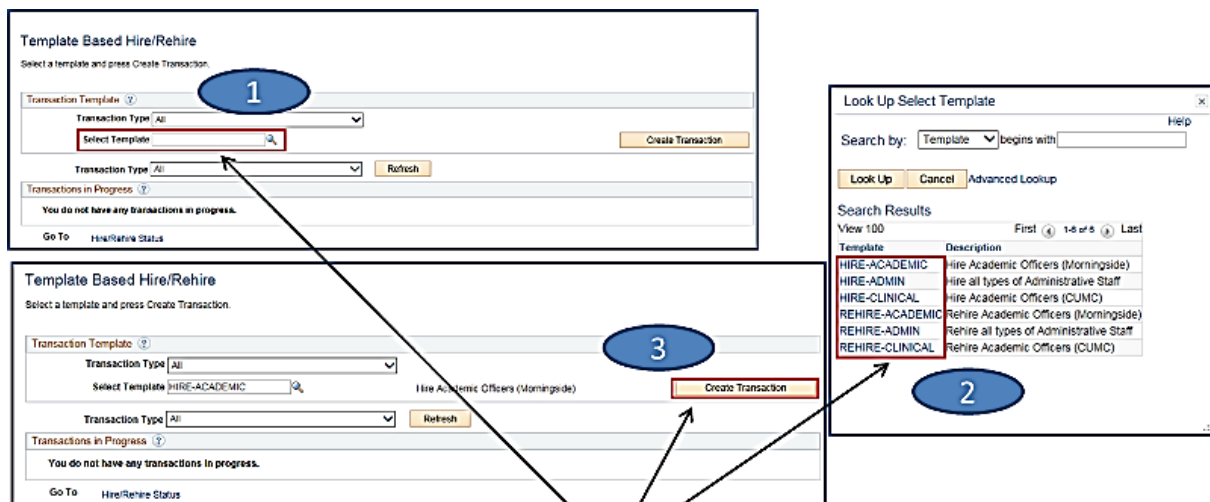
If you have any questions, please contact [the HR Service Center](#).

Select a Template

For hires when the template is not automatically created by the TalentLink integration process, select a template and begin entry. From the Template Based Hire/Rehire page, click the look up glass next to Select Template. From there you can select the correct template needed for the hire.

Notes:

- Remember, it is important to select the correct template at the initial selection because once data is saved into a template it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template
- The CUIMC Academic Hire and Rehire templates are used to hire or rehire ALL academic personnel at the Columbia University Irving Medical Center. These templates are used for both clinical and non-clinical positions, except those who are reappointed by the roster process. For clinical positions, complete the clinical data fields on the form. For academic appointments with no clinical role, the clinical data fields are left blank
- The Morningside Academic Hire and Rehire templates are used to hire or rehire all academic personnel on the Morningside, Lamont Doherty Earth Observatory (LDEO), Nevis and Manhattanville campuses
- The Administrative Hire and Rehire templates are used to hire or rehire all administrative positions regardless of campus



The image shows two screenshots of the HR system interface. The top screenshot shows the 'Template Based Hire/Rehire' form with a 'Select Template' field and a magnifying glass icon. A blue circle with the number '1' is placed over the magnifying glass icon. The bottom screenshot shows the same form with the 'HIRE-ACADEMIC' template selected in the 'Select Template' field. A blue circle with the number '3' is placed over the 'Create Transaction' button. To the right, a 'Look Up Select Template' dialog box is shown with a search results table. The 'HIRE-ACADEMIC' template is highlighted in red in the table. A blue circle with the number '2' is placed over the highlighted row in the table. Arrows point from the magnifying glass icon in the top screenshot to the dialog box, and from the dialog box to the 'Create Transaction' button in the bottom screenshot.

To Access and Select a Hire Template:

- From within the Transaction Template section, click on the look up button next to the Select Template field
- Select the needed template from the search results list
- Click "Create Transaction"

Enter the Hire Details

When you select a template, the first screen that appears displays defaulted information specific to the chosen template as well as the Job Effective Date (the Hire Date) for the person. This date defaults to today's date and **must be changed to the employee's date of hire/start of the appointment (if it isn't today's date)**.

The Job Effective Date is the only item that requires entry on the screen. Once the Job Effective Date is entered, click the "Next" button. An asterisk (*) indicates the field is required entry.

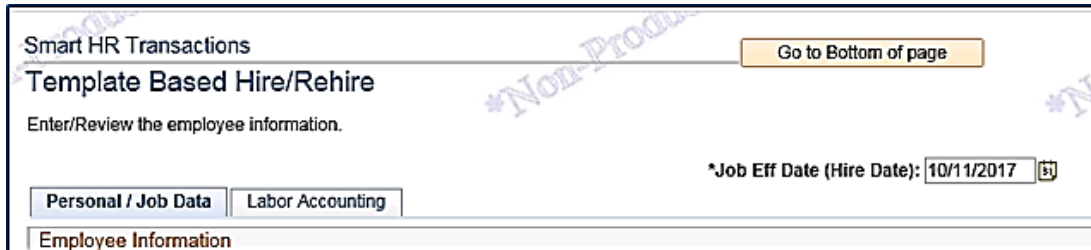
All of the remaining fields on the screen default based upon the template selected and cannot be changed. If you selected the incorrect template, click "Cancel" and begin again.

- **Template** = Description of the template chosen. In this example, it's the Administrative template
- **Organizational Relationship** = the relationship of the person to the University
- **Country** = United States is a system default which simply indicates the country where the majority of employees work. If the person is working abroad and not in the US, information about their home, mailing and office addresses can be changed in the template on the next screen
- **Category Code** = the type of position the employee is hired into
- **Employee ID** = "NEW" as this is a new hire who does not yet have an Employee ID
- **Action** = the type of action taken in this transaction, e.g. Hire
- **Reason Code** = the reason you are entering this transaction, e.g. New Hire

Note: The Job Effective Date/Hire Date entered on this page appears on the top right of page 1 of the template. The date can be edited from either location, if needed.

Enter Employee Information

You are now in the template, or electronic form. This is where you key in the hire data for the employee. Fields noted with an '*' are required information and must be entered. To enter employee data into the template, scroll through the form entering information into each data field. Note the action options at the top and bottom of the page. Let's review these options before we review the data field entry.

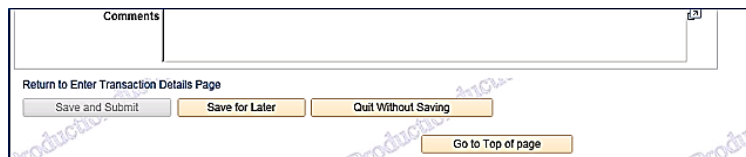


The "Go to Bottom of Page" Button

Clicking this button brings you to the bottom of the page where you can take the following actions on the template.

The "Labor Accounting" Tab

Clicking this tab saves the information entered and moves you to page 2 of the template where you enter the employee's Salary Distribution and Additional Compensation Payments known at the time of hire. Refer to the *Template Based Hires and Labor Accounting* course for training on how to complete this page of the template.



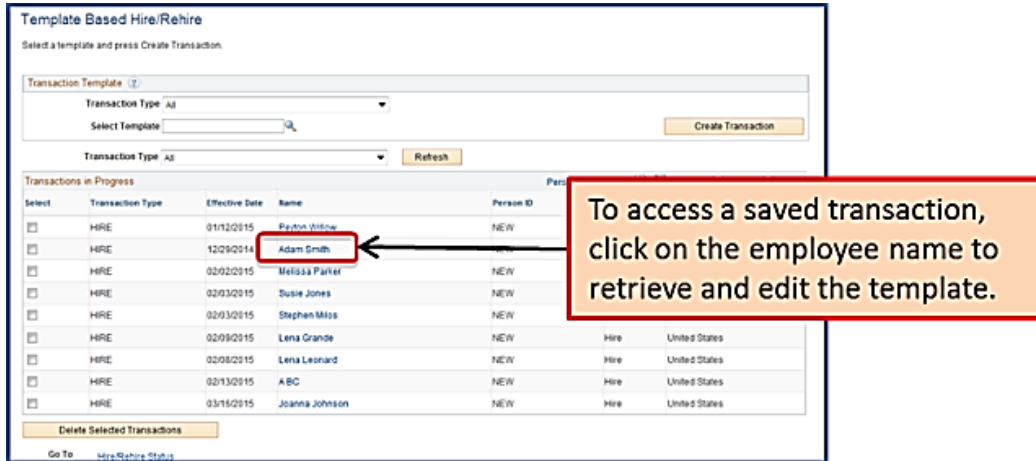
The "Return to Transaction Details Page" Link

Clicking this link returns you to the prior page of the template. From this page, you will return to the "Enter Hire Details" page of the template.

Information entered in the template should remain when moving between pages. However, it is good practice to click save periodically including before you change pages.

The "Save for Later" Button

You can save an incomplete transaction and return to update it prior to submitting it to a 1st level approver. Click this button and you will receive the prompt to confirm this action. Click "OK" and the transaction is saved and can be accessed, by the initiator only, on the "Transactions in Progress" section of the main page. **Note:** the PAC system logs you out of the application after a thirty-minute period of inactivity. You can save the information entered and complete it at a later time by clicking "Save for Later".



Template Based Hire/Rehire
Select a template and press Create Transaction

Transaction Template [?]
Transaction Type: AJ
Select Template [?]
Create Transaction

Transaction Type: AJ Refresh

Select	Transaction Type	Effective Date	Name	Person ID
<input type="checkbox"/>	HIRE	01/12/2015	Rayton Wilton	NEW
<input type="checkbox"/>	HIRE	12/09/2014	Adam Smith	NEW
<input type="checkbox"/>	HIRE	02/02/2015	Melissa Parker	NEW
<input type="checkbox"/>	HIRE	02/03/2015	Susie Jones	NEW
<input type="checkbox"/>	HIRE	02/03/2015	Stephen Mios	NEW
<input type="checkbox"/>	HIRE	02/09/2015	Lena Grande	NEW Hire United States
<input type="checkbox"/>	HIRE	02/08/2015	Lena Leonard	NEW Hire United States
<input type="checkbox"/>	HIRE	02/13/2015	A BC	NEW Hire United States
<input type="checkbox"/>	HIRE	03/15/2015	Joanna Johnson	NEW Hire United States

Delete Selected Transactions
Go To Hire/Rehire Status

To access a saved transaction, click on the employee name to retrieve and edit the template.

The "Quit Without Saving" Button

Clicking this button removes any data changes you made to the form *since it was last saved*. Any information you entered, *from the last time it was saved*, will not be saved in the system and any documents you attached will be removed. This action does not remove the transaction from the workflow; it simply brings you back to the form as it was when it was last saved.

If you already saved the form this action does not remove the transaction from your draft hires to process queue; it simply resets the form back to the way it was when you first accessed it. The form remains in your "Transactions in Progress" queue.

The "Go to Top of Page" Button

Clicking this button brings you to the top of the page where you can click the "Labor Accounting" tab to move to page 2 of the template.

If you have not saved the form, the data entries and documents will be erased.

Social Security Number

The first entry field is the employee's Social Security Number (SSN). Ensure that this is the correct number for the person whom you are hiring by confirming that the number that you have entered corresponds exactly to what the employee entered on both of their tax forms.

Social Security No.
*Social Security No. <input type="text"/>

The system performs a check, once you press the 'Enter' key or tab out of the data field or click the "Save for Later" button, that matches the number entered against existing SSNs in PAC.

- If there is not a match for the person with this SSN and a valid 9-digit SSN was entered, continue on with the entry process as no one currently in PAC has this Social Security number.
- If there is a match, a pop-up box will appear letting you know that this SSN already exists in the system. This could mean either of the following: that the SSN belongs to an active employee and thus you are unable to enter the hire into the template, or that the SSN belongs to a terminated person and the rehire template should be used. In either case confirm that you have been given the correct SSN by requesting the employee's Social Security card.

SSN Search and System Check

Results returned based on the SSN check.

1. If you entered an invalid 9-digit number, an error message will appear saying that this is not a valid SSN and to check it and try again. A Tax ID number is not a valid SSN.
2. If there is a match and this SSN is currently in use by a Columbia University employee, an error message will appear saying that this SSN is already in use for an employee and will provide the Employee ID. If you receive this message, review what type of transaction should be taking place:
 - check that you entered the correct SSN or that the person has changed their name, or
 - if this is for a multiple job or additional academic appointments, you cannot use TBH but must submit a paper Nomination Form for the transaction, or
 - If the person is a rehire, take note of the Employee ID and use the Rehire template to enter the transaction.

Message		
National ID	is already used for employee	(1000,688)
A National ID cannot be used within the same country for two different individuals. The National ID you entered is already in use by another employee, dependent, or applicant.		
<input type="button" value="OK"/>		

Primary Name

In the Primary Name section is where you enter the employee's legal name as it appears on their tax forms and other legal documents.

Data Fields:

Name Prefix - click the drop down arrow and select a name prefix. This is a required field. When selecting a prefix for Academic/Clinical hires, follow these rules:

- Use **Professor** - for faculty in a professorial position at the Morningside campus or CUMC faculty without a medical or doctoral degree if their title contains the word "Professor"
- Use **Doctor** - for all CUMC faculty with appropriate degrees (medical degree, dental degree or doctoral degree) and for all officers of research and all officers of the libraries holding doctoral degrees
- Use **Mr. /Ms.** - for those without doctoral degrees or without a professional title.

First Name - enter the first name (required)

Middle Name - this is optional (required for academic personnel)

Last Name - enter the last name (required)

Name Suffix - this is optional (required for academic personnel)

The image shows a screenshot of the 'Primary Name - English' form. The form contains the following fields: '*Name Prefix' (a dropdown menu), '*First Name' (a text input), 'Middle Name' (a text input), '*Last Name' (a text input), and 'Name Suffix' (a dropdown menu). Two callouts are present: one pointing to the '*Name Prefix' dropdown menu, which lists: Dean, Dr., Father, Honorable, Miss, Mr., Mrs., Ms., Professor, Reverend, Sister; and another pointing to the 'Name Suffix' dropdown menu, which lists: Junior, Senior, The Fourth, The Second, The Third.

Home and Mailing Addresses

Enter the Permanent and Mailing (if applicable) addresses for the employee.

Home Address (Perm)

The *permanent* home address of the employee. For people on a visa, faculty teaching on-line courses who do not live in the New York metropolitan area as well as visiting faculty and officers of research, Home Address should reflect the actual address of the person (either in the United States or in a foreign country).

Enter the employee's home/permanent address (required). The Home Address must match the address on the tax forms. Year-end tax forms will be sent to the home address on file.

Data Fields:

- **Address Type** - defaults to 'Home'
- **Country** - defaults to USA but can be changed as needed. Once you select a country from this field, the 'State' field contains states/provinces/areas specific to that selected country
- **Address Line 1** - enter the street address (required)
- **Address Line 2** - enter the apartment/suite number (if applicable)
- **Address Line 3** - enter if needed
- **City** - enter the city (required)
- **State** - enter the state (required)
- **Postal Code** - enter a postal code (zip code for US addresses). A postal code is required if the country selected uses postal codes

Mailing Address (Curr)

The *local* home address of employees, students, visiting faculty or visiting officers of research. Enter the employee's mailing address **only** if the mailing address is different from the home/permanent address (otherwise leave blank). For people on a visa, Mailing Address should reflect where they currently live locally in the US.

Data Fields:

- **Address Type** - defaults to 'Mailing'
- **Country** - defaults to USA but can be changed as needed
- **Address Line 1** - enter the street address (required, if needed)
- **Address Line 2** - enter the apartment/suite number (if applicable)
- **Address Line 3** - enter if needed
- **City** - enter the city (required, if needed)
- **State** - enter the state (required, if needed)
- **Postal Code** - enter a postal code (zip code for US addresses), if needed. A postal code is required if the country selected uses postal codes

Home Address (Perm)	
*Address Type <input type="text" value="Home"/>	*Country <input type="text" value="USA"/>
*Address Line 1 <input type="text"/>	
Address Line 2 <input type="text"/>	
Address Line 3 <input type="text"/>	
*City <input type="text"/>	State <input type="text"/>
Postal Code <input type="text"/>	
Mailing Address (Curr)	
Address Type <input type="text" value="Mailing"/>	*Country <input type="text" value="USA"/>
Address Line 1 <input type="text"/>	
Address Line 2 <input type="text"/>	
Address Line 3 <input type="text"/>	
City <input type="text"/>	State <input type="text"/>
Postal Code <input type="text"/>	

Office and Check Addresses

Enter the Office and Check Addresses for the employee (required).

Office Address

The *work* location is where the employee receives Columbia mail/the employee's official CU work address (required). For Morningside campus addresses, enter the Room and Building and Mail Code only. If the employee is not in a campus building, enter the Firm Name (if applicable), Street, City, State, Zip /Postal Code (and Country if outside the United States).

For faculty teaching on-line courses, the Office Address should be their CU address with "ONL" after the Room and Building (e.g., 303 Lewisohn - ONL).

Data Fields:

- **Address Type** - defaults to 'CU Office' and cannot be changed.
- **Country** - defaults to USA but can be changed as needed.
- **Addr Line 1 (Rm & Bldg)** - enter the Building Address. Enter the complete name of the building and do not use abbreviations. Refer to the *Columbia University Building Names Job Aid* located on the HR Website.
- **Address Line 2** - do not need to enter if the above is a campus address (for Morningside addresses). For CUMC addresses, use the street address. See example below.
- **Addr Line 3 (Mail Code)** - enter the Mail Code *numbers only* here (for Morningside addresses), e.g. 8705. For CUMC addresses, leave blank.
- **City** - do not enter if Columbia address (for Morningside addresses). For CUMC addresses, enter the City.
- **State** - do not enter if Columbia address (for Morningside addresses). For CUMC addresses, enter the State.
- **Postal Code** - do not enter if Columbia address (for Morningside addresses). For CUMC addresses, enter the Postal Code.

Check Address

The *delivery* location for the employee's check, usually the address and Mail Code (if applicable) of the person in the department handling Human Resources. This is a required field.

Data Fields:

- **Check Sequence Code** – You must enter the appropriate *Check Sequence Code* for the employee's department. If you do not know the check sequence code for your department, refer to the *Check Sequence Code Listing Job Aid* located on the HR Website
- **Address Lines 1-3** - defaults once the Check Sequence Code is selected
- For more information on the use of Check Addresses at Columbia University, visit the HR Website.

Morningside Office and Check Address Example

Office Address	
*Address Type <input type="text" value="CU Office"/>	*Country <input type="text" value="USA"/>
*Addr Line 1 (Rm & Bldg) <input type="text" value="612 Kent Hall"/>	
Address Line 2 <input type="text"/>	
Addr Line 3 (Mail Code) <input type="text" value="3928"/>	
City <input type="text"/>	State <input type="text"/>
Postal Code <input type="text"/>	
Check Address	
*Check Sequence Code <input type="text" value="34501"/>	
Address Line 1 <input type="text" value="Mid East-Asian Lan-Cult c/o J. Re"/>	
Address Line 2 <input type="text" value="Kent Hall"/>	
Address Line 3 <input type="text" value="MC 3928"/>	Number <input type="text" value="34501"/>

CUIMC Office and Check Address Example

Office Address	
*Address Type <input type="text" value="CU Office"/>	*Country <input type="text" value="USA"/>
*Addr Line 1 (Rm & Bldg) <input type="text" value="MHB 7GN-432"/>	
Address Line 2 <input type="text" value="177 Fort Washington Avenue"/>	
Addr Line 3 (Mail Code) <input type="text"/>	
City <input type="text" value="New York"/>	State <input type="text" value="NY"/>
Postal Code <input type="text" value="10032"/>	
Check Address	
*Check Sequence Code <input type="text" value="52701"/>	
Address Line 1 <input type="text" value="Medicine c/o M. Marte-Miraz"/>	
Address Line 2 <input type="text" value="P&S Box 030, Medicine"/>	
Address Line 3 <input type="text" value="Medical Center"/>	Number <input type="text" value="52701"/>

Phone Numbers

Enter the 10-digit number for a phone number which is the area code plus the number, e.g. 2125551234. You do not need to enter hyphens, parentheses or the prefix of (1). The system will place this entry into the proper format, e.g. 212/555-1234 once the form is saved. The phone type defaults for each category.

Note: Phone number data fields are not *system* required as you can see they do not have the "*". However, please be sure to enter either a home or mobile phone number along with the office phone number.

Home Phone Number Data Field:

- **Telephone** - enter the 10-digit number

Mobile Phone Number Data Field:

- **Telephone** - enter the 10-digit number (optional). If the mobile number is entered, the employee will be automatically linked to the Public Safety Text Alerts

Office Phone Number Data Field:

Telephone - enter the 10-digit number (required). This number will display in the directory once the record is added to PAC by HRPC. Use the employee's actual telephone number and not the main office number. Note: for International telephone numbers, enter the number and it will appear as entered and will not reformat.

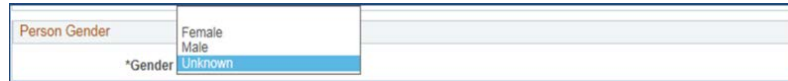
Note: an employee can update their emergency contact and phone information using Employee Self-Service. Managers can also update an employee's phone information using Manager Self-Service.

Home/Preferred Phone	
Phone Type <input type="text" value="Home"/>	Telephone <input type="text"/>
Mobile Phone	
Phone Type <input type="text" value="Mobile"/>	Telephone <input type="text"/>
CU Office Phone	
Phone Type <input type="text" value="CU Office"/>	Telephone <input type="text"/>

Gender, Birth Date and Marital Status

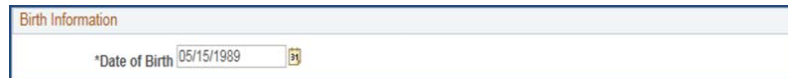
Person Gender Data Field:

- **Gender** - click the drop down arrow and select the employee's gender. Select 'Male' or 'Female'. If 'Unknown' is selected, a pop-up message appears when navigating to page 2 prompting you that 'Unknown' was selected as the gender. For Benefits purposes, the data feed requires that either 'male' or 'female' be selected.



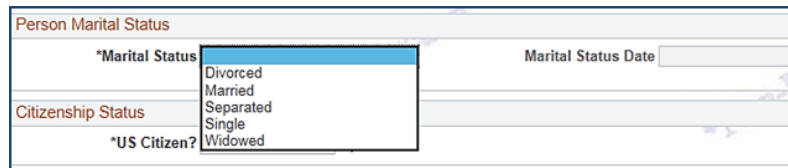
Birth Information Data Field:

- **Date of Birth** - enter the employee's date of birth. Click on the calendar icon to the right of the field to select the date or enter the date using this format MM/DD/YYYY. An error message will appear if the date of birth entered yields ages below 14 or above 100. Please confirm that the date of birth is entered correctly. Be especially careful when referring to documents from countries outside of the United States since the month and day are reversed. The format in US documents is MM/DD/YYYY. In documents from other countries the format may be DD/MM/YYYY.



Person Marital Status Data Fields:


- **Marital Status** - click the drop down arrow and select the employee's marital status. This is a required field.
- **Marital Status Date** - this field is only required when the marital status = married. To enter the date, click on the calendar icon to the right of the field to select the date or enter the date using this format MM/DD/YYYY. A future date cannot be entered. A PAF will need to be submitted once the marriage has occurred to update the information.



Citizenship and Visa Status

Citizenship Status Data Field:

- **US Citizen** - click the drop down arrow and select the employee's US Citizenship Status. Select 'Y' if the individual is a US citizen; 'N' if the person is not a US citizen (is on a visa or is a Permanent Resident). This is a required field.

Citizenship Status	
*US Citizen?	<input type="text"/> 
<div style="text-align: right; color: blue; font-weight: bold;">*Note</div>	
Visa	
Visa Type <input type="text"/> 	Perm Res Reg No. <input type="text"/>
Expiration Date <input type="text"/> 	

Visa

If the Citizenship Status is "Y", the Visa fields are greyed out and are not enterable or editable.

If the Citizenship Status is "N", the Visa Type and Expiration Date fields are required except for Permanent Residents for whom no Expiration Date should be entered. Enter information specific to the employee's visa status (in all templates). Note: An error message will generate if the information is not entered in the Academic Hire/Rehire templates.

Data Fields:

- **Visa Type** - click the magnifying glass next to this field and from the list that appears, select the type of visa the employee holds.
- **Expiration Date** - enter the expiration date of the visa. Click on the calendar icon to select the date or enter the date using this format MM/DD/YYYY. Do not enter an expiration date for Permanent Residents.
- **Perm Res Reg No.** - enter the 'A' number for Permanent Residents in the following format: A#999-999-999.

Note: Visa Type and Expiration Date must be the same as listed in the supporting documents. In general the visa must have been obtained by Columbia University. If another entity has obtained the visa, please be sure to attach documentation that shows that the person is also eligible to work at Columbia University and use the expiration date tied to the period when the person can work at Columbia rather than the expiration of the visa belonging to the other institution.

Ethnicity / Race

- **Ethnicity/Race** – select all options as indicated by the employee in the new hire paperwork. If the employee did not specify, select the "Not Disclosed" option. Race/Ethnicity Form must be used to obtain this information.

The "Not Disclosed" option is currently visible in the Academic templates and will be applied to the Administrative and Clinical templates. Employees can also update this information through Employee Self-Service.

Ethnicity/Race	
<input type="checkbox"/> Hispanic or Latino	<input type="checkbox"/> American Indian/Alaska Native
<input type="checkbox"/> Asian	<input type="checkbox"/> Black or African American
<input type="checkbox"/> Native Hawaiian/Pacific Islander	<input type="checkbox"/> White
<input type="checkbox"/> Not Disclosed	

Education Data

In these sections, select the highest education level achieved and enter the details for completed degrees. Please ensure that the school information is accurate and complete.

Highest Education Level

Click the drop down arrow and select the highest education level the employee has *achieved*. **Note:** this field defaults to "Not Indicated" and must be changed. It is a required field and is the record of the highest degree earned and not one that is in progress. For example, if an employee currently holds a Master's degree and is in process of obtaining a Doctorate, the highest level completed is the Master's degree. Once the employee completes the doctoral program, the record can be updated by submitting a PAF with the appropriate documentation.

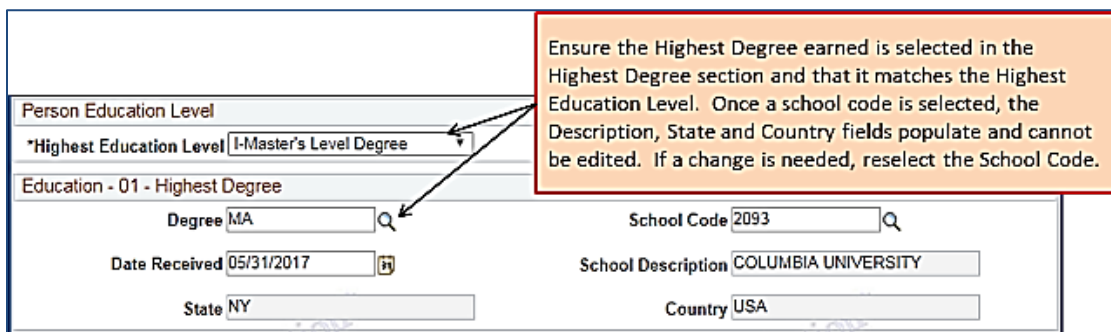
Education - Highest Degree

The highest degree earned by the employee. This is a required field. *The highest degree must match the highest education level.* Ensure the highest degree earned is selected.

- If the employee's highest degree is "High School Graduate", select "HS Graduate or Equivalent" in the Degree field. If the date of graduation is known, enter the exact date. If the exact date is unknown, enter a 6/30 date that is 18 years greater than their date of birth.

Data Fields:

- **Degree** – click the magnifying glass next to this field and from the list that appears, select the degree earned by the employee
- **Date Received - Required.** Click the calendar icon to the right of the field to select the date or enter the date using this format MM/DD/YYYY. If month and day are unknown, default to either 2/28, 5/31, or 10/31 if the degree was earned at Columbia; or to 6/30 or 12/31 if the degree was earned at another institution. The actual date (MM/DD/YYYY) must be provided for people who have received their doctorates within the past two years; no default dates may be used in such cases. If the month and year are listed on the curriculum vitae, add the last day of the month to complete MM/DD/YYYY
- **School Code** - enter the school code, if known, or click the magnifying glass next to this field and search for and select the school where the employee earned the degree specified. Important - If a school does not appear in the list, enter the code "2000" for a US University and "1000" for a Foreign University and enter the degree earned, the full name of the institution, its location (US state or country), and the complete date (MM/DD/YYYY) the degree was earned in the "Comments" field.
 - Select the *University* code for any degree earned from a school within that University. For example, use Columbia University and not Columbia College
 - For *High Schools* that do not appear in the list, enter the code "3000" for Other High School"
- **School Description** - this field displays the name of the school which defaults per the School Code selected.
- **State** - this field displays the State location of the school which defaults per the School Code selected.
- **Country** - this field displays the Country location of the school which defaults per the School Code selected.



The screenshot shows a form titled "Education - 01 - Highest Degree". It includes fields for "Degree" (set to MA), "Date Received" (05/31/2017), "State" (NY), "School Code" (2093), "School Description" (COLUMBIA UNIVERSITY), and "Country" (USA). An orange callout box with a red border contains the following text: "Ensure the Highest Degree earned is selected in the Highest Degree section and that it matches the Highest Education Level. Once a school code is selected, the Description, State and Country fields populate and cannot be edited. If a change is needed, reselect the School Code." Arrows point from the callout box to the "Degree" and "School Code" fields.

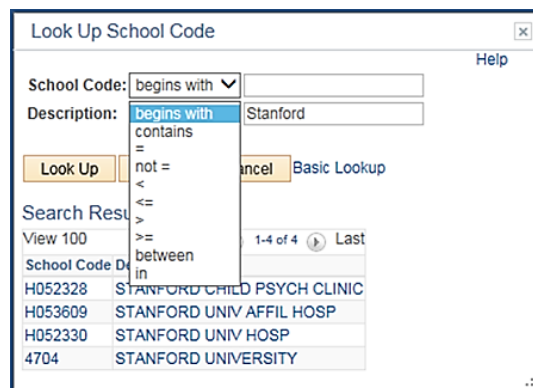
Locating a School Code

You may not know the school code and may find it easier to locate the school using the search engine. To find a school by name, follow these steps:

1. Click the magnifying glass next to the School Code field
2. Ensure the lookup option is on "Advanced Lookup". It will be on the Advanced Lookup feature if you see the link below the description field read "Basic Lookup"
3. Click the drop down arrow next to the "Description" field and select the word "contains" from the list. This will allow for a more direct search
4. Enter any part of the school name in the "Description" field. It is best to use a more specific name in the school name. Do not use a general word such as "University"
5. Click "Lookup"
6. Locate the school from the list that appears and click on either the School Code or Description link for the school. The information will populate into the School Code and Description fields

Notes:

- A "%" is used as a wildcard symbol when searching in PAC. For example, typing, "flor%" returns results with school names that include both "Florida" and "Florence"
- If there are multiple entries for a school, always use the most generic one (e.g., Columbia University, not Columbia University School of Business.)
- There is a project underway to clean the list of schools. Morningside departments should contact Academic Appointments for assistance and CUMC departments should contact CUMC Faculty Affairs for assistance if unsure which version of the school name should be used.
- School Codes that begin with an "H" indicate hospitals. Do not select a hospital for the institution from which a degree was received.



School Code	Description
H052328	STANFORD CHILD PSYCH CLINIC
H053609	STANFORD UNIV AFFIL HOSP
H052330	STANFORD UNIV HOSP
4704	STANFORD UNIVERSITY

Education Data Continued

Education - Accomplishment Fields

Continue entering additional degrees the employee earned in these fields.

- In the Academic New Hire template, you can enter additional degrees for a total of five degrees.
- In the Clinical New Hire template, you can enter a total of two degrees.
- In the Administrative New Hire template, you can enter a total of four degrees.

Note for clinical appointments. When an individual has both a Doctor of Medicine and a PhD, the highest education level should reflect what is closest to being practiced. For example, if the individual is teaching, the PhD is listed as the highest education level and as the highest degree. If the individual is in clinical practice, the MD is listed as the highest education level and the highest degree.

Person Education Level	
*Highest Education Level: <input type="text" value="J-Doctorate"/>	
Education - 01 - Highest Degree	
Degree: <input type="text" value="PHD"/>	School Code: <input type="text" value="2093"/>
Date Received: <input type="text" value="05/31/2018"/>	School Description: <input type="text" value="COLUMBIA UNIVERSITY"/>
State: <input type="text" value="NY"/>	Country: <input type="text" value="USA"/>
Education - 02 - Accomplishment	
Degree: <input type="text"/>	School Code: <input type="text"/>
Date Received: <input type="text"/>	School Description: <input type="text"/>
State: <input type="text"/>	Country: <input type="text"/>
Education - 03 - Accomplishment	
Degree: <input type="text"/>	School Code: <input type="text"/>
Date Received: <input type="text"/>	School Description: <input type="text"/>
State: <input type="text"/>	Country: <input type="text"/>
Education - 04 - Accomplishment	
Degree: <input type="text"/>	School Code: <input type="text"/>
Date Received: <input type="text"/>	School Description: <input type="text"/>
State: <input type="text"/>	Country: <input type="text"/>
Education - 05 - Accomplishment	
Degree: <input type="text"/>	School Code: <input type="text"/>
Date Received: <input type="text"/>	School Description: <input type="text"/>
State: <input type="text"/>	Country: <input type="text"/>

Tenure Data


Click the drop down arrow to the right of the field and select the employee's tenure status (required). Administrative hires (including support staff, casuals and work study) should always be tenure status 6. As this is a required field, see below for both academic and administrative hire selections. Please ensure Tenure is correctly selected.

Tenure Status Data Field Options:

- **Tenure Status = 1. Tenured** - is used for faculty who have tenure
- **Tenure Status = 2. Tenure of Title** - is used for faculty who have tenure of title
- **Tenure Status = 3. Non-Tenured But on Track** - is used for full-time faculty who are on tenure track
- **Tenure Status = 4. Other Non-Tenured** - is used for full-time faculty not on tenure track and all part-time faculty
- **Tenure Status = 5. None** - is used for Officers of Research and Student Officers
- **Tenure Status = 6. Not Applicable** - is used for Officers of Administration and Support Staff, Casual employees and Work Study

Tenure Effective Date Field:

- **Tenure Eff Date (Req'd for Tenure Status 1 or Tenure Status 2 only)** - is required for faculty who have tenure status equal to "1 - Tenured" or "2 - Tenure of Title". Enter the date the tenure was effective using this format MM/DD/YYYY

Tenure Data	
*Tenure Status	Tenure Eff Date (Req'd <input type="text"/>  for 1 or 2 Only)
Complete University Title	
CU Business Title	

1. Tenured
2. Tenure of Title
3. Non-Tenured But on Track
4. Other Non Tenured
5. None
Not Applicable

Position Information

The employee's position number is a required field. All other fields in this section default based upon the position number entered.

Position Information Data Fields:

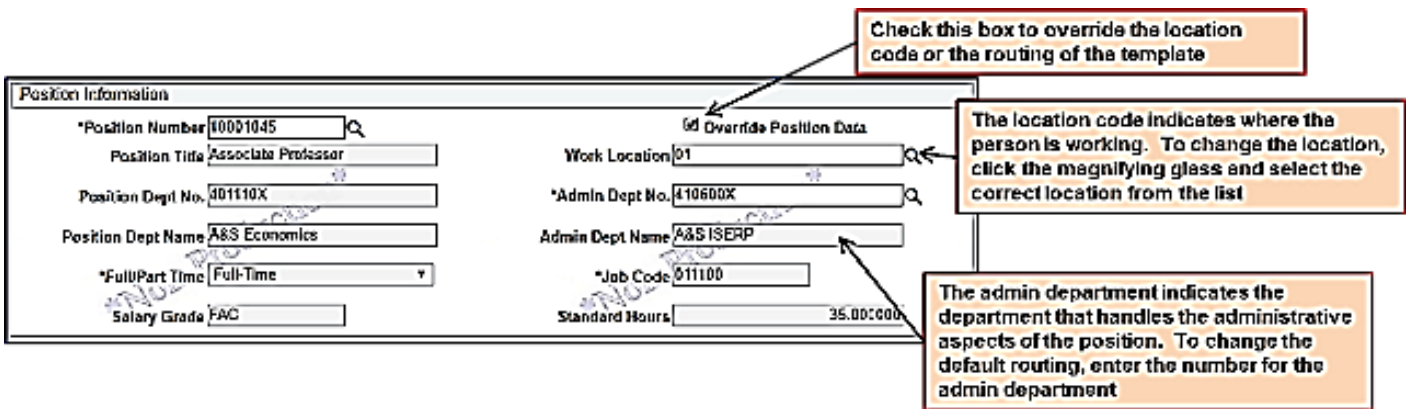
- **Position Number** - enter the position number
- **Position Title** - this defaults based on the position number entered and cannot be changed
- **Position Department Number (Position Dept No.)** - the department number for the position. This defaults based on the position number entered and cannot be changed
- **Position Department Name (Position Dept Name)** - the department name for the position. This defaults based on the position number entered and cannot be changed
- **Full/Part Time** - the full-time or part-time status associated with the position. This defaults based on the position number entered and cannot be changed
- **Salary Grade** - the salary grade for the position. This defaults based on the position number entered and cannot be changed
- **Work Location** - a code that indicates where the employee is working. It defaults based on the position number entered and can be changed if needed (Override Position Data box must be checked)
- **Admin Department Number (Admin Dept No.)** - the administrative department number for the employee based on the position number entered. The template will route in the workflow to this department. This field can be changed to identify an administrative department different from the position department if needed (Override Position Data box must be checked)
- **Admin Department Name (Admin Dept Name)** - the administrative department name of the administrative department number. This defaults based on the admin department number selected.
- **Job Code** - the job code for the position number entered and cannot be changed. This defaults based on the position number entered and cannot be changed
- **Standard Hours** - the number of hours defaults based on the position number entered and cannot be changed

Position Information	
*Position Number <input type="text" value="10001045"/>	<input type="checkbox"/> Override Position Data
Position Title <input type="text" value="Associate Professor"/>	Work Location <input type="text" value="01"/>
Position Dept No. <input type="text" value="401110X"/>	*Admin Dept No. <input type="text" value="401110X"/>
Position Dept Name <input type="text" value="A&S Economics"/>	Admin Dept Name <input type="text" value="A&S Economics"/>
*Full/Part Time <input type="text" value="Full-Time"/>	*Job Code <input type="text" value="011100"/>
Salary Grade <input type="text" value="FAC"/>	Standard Hours <input type="text" value="35.000000"/>

Override Position Data (Override Administrative Department / Work Location Data)

Check this box when you need to designate that the position is administered by a department different from the position department or that the employee is working in a location different from the one that defaulted with the position number entry.

- The administrative department is where the approval will be routed.
 - For example, a faculty member holds an appointment in Economics but ISERP is the administrative department or a faculty member is trained in the discipline of Medicine and the position is in a Medicine sub-department but Surgery is the administrative department. The hiring paperwork should reflect if a position should be administered by another department.



The screenshot shows a 'Position Information' form with the following fields and callouts:

- Position Information** (Form Title)
- *Position Number: 10021045
- Position Title: Associate Professor
- Position Dept No.: 401110X
- Position Dept Name: A&S Economics
- *Full/Part Time: Full-Time
- Salary Grade: FAC
- Override Position Data** (Callout: Check this box to override the location code or the routing of the template)
- Work Location: 01 (Callout: The location code indicates where the person is working. To change the location, click the magnifying glass and select the correct location from the list)
- *Admin Dept No.: 410600X (Callout: The admin department indicates the department that handles the administrative aspects of the position. To change the default routing, enter the number for the admin department)
- Admin Dept Name: A&S ISERP
- *Job Code: 011100
- Standard Hours: 35.001000

Notes:

- The workflow engine routes the template based on the Admin Department indicated. If the template needs to be routed for approval to a different department, check the "Override Position Data" box and enter the department number where the template should route.
- If you check the "Override Position Data" box, be sure to enter the department number. Otherwise, the transaction will route to the approvers in the defaulted position department and not to the administrative department where you would like it to go.

Complete University Title

The Complete University Title field is a free form field which is a mandatory entry for faculty, officers of research, and officers of the libraries. No Complete University Title should be entered for student officers.

The position title and the position department should be combined to create the complete title (adhering to any exceptions).

Reference the *Enter a Complete University Title Guide* on the in the HR Website for complete instructions and examples including modified and unmodified titles for faculty, named professors, officers of research, officers of the libraries, and multiple appointments (via paper process).

The Complete University Title should not have any abbreviations or symbols (e.g. "&"). Academic personnel with one or more distinct titles (e.g., academic and administrative) should have these titles separated by a "semicolon" (e.g., Professor of History; Chair, Department of History).

Enter the Complete University Title that incorporates the academic/clinical officer's Position Description and Department/School

Complete University Title	
Complete University Title	Assistant Professor of Economics
Position Information	
*Position Number 10001045 <input type="text"/>	<input type="checkbox"/> Override Position Data
Position Title Associate Professor <input type="text"/>	Work Location 01 <input type="text"/>
Position Dept No. 401110X <input type="text"/>	*Admin Dept No. 401110X <input type="text"/>
Position Dept Name A&S Economics <input type="text"/>	Admin Dept Name A&S Economics <input type="text"/>
*Full/Part Time Full-Time <input type="text"/>	*Job Code 011100 <input type="text"/>
Salary Grade FAC <input type="text"/>	Standard Hours 35.000000 <input type="text"/>

Position Department Number and Name default from the Position Number entered

Note: For administrative positions, the generic description (e.g. Administrative Assistant, Billing Supervisor, Finance Manager) is acceptable and does not require editing.

Interdisciplinary Departments

In the Interdisciplinary Departments section, enter the department, if applicable.


Officers of instruction in a professorial rank who fulfill significant functions in more than one department or in a department, an institute, or a center may hold interdisciplinary appointments.

There is one (1) section for an Interdisciplinary Department entry on the Morningside Academic Template and there are two (2) sections for Interdisciplinary Department entries on the CUMC Academic Template.

Interdisciplinary Department Data Fields

- **Effective Date** - the effective date *defaults to the date of hire* once a department number is entered
- **Department No.** - enter the department number of the Interdisciplinary Department
- **Department Name** - this field defaults based upon the department number selected

Note: If an individual holds an Interdisciplinary Appointment, be sure to attach the Memorandum of Agreement as one of the documents in the transaction.

Interdisciplinary Department - 01	
Effective Date <input type="text"/>	Department No. <input type="text"/> 
Department Name <input type="text"/>	

Compensation Information - Salary Information Section

There are two sections where compensation information is entered. Completion of these sections is dependent upon the type of hire and the campus.

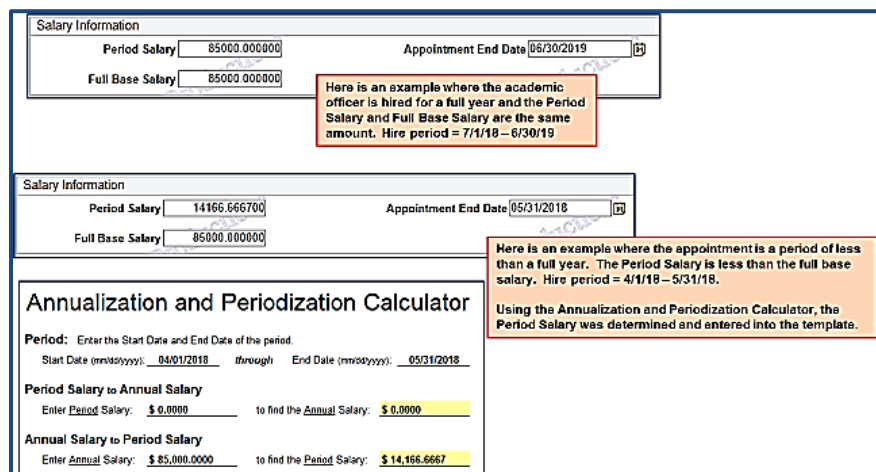
Salary Information Section

The first section is the Salary Information Section. Complete this section for academic/clinical hires whose appointment has an end date. This section is not completed for administrative hires. For admin hires, leave this section blank and continue to the next section.

Salary Information Data Fields:

- **Period Salary** - enter the salary amount here for the period of the appointment. If the period of the appointment is equal to a full year, this number will equal the full base salary and the annual salary. If the period of the appointment is less than a full year, calculate this number outside of the template and then enter that number in this field. Use the [Annualization and Periodization Calculator](#) to assist you with this calculation. This cannot deal with appointments of less than a month.
- **Full Base Salary** - enter the full salary amount the employee would earn if they were employed for a full year.
 - **Compensation Rate (Annual Salary)** – see next section.
- **Appointment End Date** - enter the date the appointment ends. This is a required field when a Period/Contract Salary is entered. An appointment end date cannot be longer than one year and cannot be later than the visa expiration date. Note: Tenured faculty should not have an appointment end date unless their visa expires within the current year.

All three data fields must be entered



The image shows two screenshots of the HR system interface. The top screenshot shows the 'Salary Information' form with 'Period Salary' and 'Full Base Salary' both set to 85000.000000 and 'Appointment End Date' set to 06/30/2019. A callout box explains that in this example, the period salary and full base salary are the same because the hire period is a full year (7/1/18 - 6/30/19). The bottom screenshot shows the 'Annualization and Periodization Calculator' form. It shows a period from 04/01/2018 to 05/31/2018. The calculator shows that for a period salary of \$0.0000, the annual salary is \$0.0000, and for an annual salary of \$85,000.0000, the period salary is \$14,166.6667. A callout box explains that in this example, the appointment is for less than a full year, so the period salary is less than the full base salary.

Compensation Information - Job Compensation Section

The second section is the Job Compensation Section. In this section, enter information specific to the employee's earnings. This is where the employee's pay is entered. This information feeds to Payroll and is used to calculate an employee's regular earnings.

Job Compensation - Pay Components Data Fields:

Salary Type - click the drop down arrow to the right of this field and select the type of salary an employee receives. Salary types include:

NAANNL = Annual Salaried Employees.

- For administrative hires, this choice is used for Officers of Administration and most Support Staff
- For Morningside academic hires, this choice is used only for tenured faculty and officers of the libraries who do not have limited clearance
- For CUMC academic hires, this choice is used only for tenured faculty

CNTRCT = Contract Employees.

- For Morningside academic hires, this choice is used only for faculty with a tenure status of 3 or 4; officers of research; student officers; and officers of the libraries with limited appointments
- For CUMC academic hires, this choice is used for faculty with a tenure status of 3 or 4; officers of research; and student officers

LGHRLY = *For HRPC Use Only*

NAHRLY = Hourly Salaried Employees (Administrative Positions Only).

- For administrative hires, this choice can be used for Casual employees, Union employees or Non-Union Support Staff

Compensation Rate (Annual/Hourly Rate) - enter the dollar amount of the compensation (the employee/academic officer's regular earnings) in this field. Enter two decimal places. Do not enter the "\$" or commas. Paychecks are generated using this number. If the salary is unknown, leave this section blank and an Approver will enter it. If this is a "zero salary appointment", leave this field blank. See next section for more information.

Compensation Frequency - this field defaults from the comp rate code selected and is used by the system to calculate pay. "A" for "Annual" defaults when either NAANNL or CNTRCT is selected. "H" for "Hourly" defaults when NAHRLY is selected.

1

2

3

Job Compensation - Pay Components

*Salary Type Compensation Rate
(Annual or Hourly Rt)

Compensation A
Frequency

Job Compensation - Pay Components

*Salary Type Compensation Rate
(Annual or Hourly Rt)

Compensation A
Frequency

Job Compensation - Pay Components

*Salary Type Compensation Rate
(Annual or Hourly Rt)

Compensation H
Frequency

Here are three examples of Annual/Hourly Rate entries. Note how the Compensation Frequency field defaults per the Rate selected.

- 1) A contract employee with regular earnings = \$72,275.00
- 2) An annual salaried employee with regular earnings = \$48,000.00
- 3) An hourly paid employee with regular earnings = \$22.50 per hour

Remember: Paychecks are generated using the Compensation Rate (Annual/Hourly Rate).

Compensation Information - Zero Salary and Zero Stipend Appointments

A **Zero Salary Appointment** is an academic appointment for Officers of Instruction and Officers of Research who work part-time at the University and are not receiving a base salary.

Postdoctoral Research Fellows and Postdoctoral Clinical Fellows not receiving a stipend are also entered in TBH. If the person does not yet have a Social Security Number, it needs to be submitted via a paper Nomination Form.

How does the system know that this is a Zero Salary Appointment or Zero Stipend Postdoctoral Fellow Appointment?

- Select "CNTRCT" for the Comp Rate Code and do not enter a salary in the Compensation Rate field
- In the Comments box, enter a note stating that this appointment is "zero salary" or "zero stipend"

Zero Salary/Zero Stipend Appointments and Workflow

- At CUIMC, the 3rd Level Approver provides the financial review for appointments and does not review \$0 salary/\$0 stipend appointments. A \$0 salary/\$0 stipend appointment transaction moves directly to HRPC after the 2nd level review and approval. The template will route directly from the Office of Faculty Affairs to the HRPC

Zero Salary Appointment Example

Position Information

*Position Number: 10003717
 Position Title: Instructor in Clin
 Position Dept No.: 756400X
 Position Dept Name: NSC Neuroscience
 *Full/Part Time: Part-Time
 *Job Code: 013100
 Salary Grade: FAC
 Work Location: 02
 *Admin Dept No.: 756400X
 Admin Dept Name: NSC Neuroscience
 Standard Hours: 5.000000

Salary Information

Period Salary: 0
 Full Base Salary: 0
 Appointment End Date: 05/30/2019
 *Salary Type: CNTRCT
 Compensation Rate: (Annual or Hourly R):
 Compensation A Frequency:

Salary Distribution - 1a

Combination Code: 1000013006
 Description: 54410-JR006608-70073-R82604
 Combo Code Department: 7564403 NSC Bruno Lab
 Combo Code Amount:
 Funding End Date: 05/31/2019
 Percent of Distribution: 100.000000

Callout Box 1: Here is an example of a \$0 Salary Appointment entry - page 1 of the hire template.
 1) Enter the position
 2) Enter "0" in the Period and Full Base Salary Fields (note the "0" does not show) and enter the Appointment End Date
 3) Select "CNTRCT" as the Comp Rate Code and enter a "0" in the Compensation Rate Field (note the "0" does not show)

Callout Box 2: Here is an example of the Salary Distribution entry for a \$0 Salary Appointment - page 2 of the hire template.
 1) Enter the "Combination Code" for the funding (even though there are no actual dollars allocated)
 2) Enter the Funding End Date
 3) Enter "100" in the Percent of Distribution field

Zero Stipend Appointment Example

Position Information

*Position Number Override Position Data

Position Title Work Location

Position Dept No. *Admin Dept No.

Position Dept Name **1** Admin Dept Name

*Full/Part Time

*Job Code

Salary Grade Standard Hours

Here is an example of a \$0 Stipend Appointment entry - page 1 of the hire template.

- 1) Enter the "Fellow" position
- 2) Enter "0" in the Period and Full Base Salary Fields (note the "0" does not show) and enter the Appointment End Date
- 3) Select "CNTRCT" as the Comp Rate Code and enter a "0" in the Compensation Rate Field (note the "0" does not show)

Salary Information

Period Salary **2** Appointment End Date

Full Base Salary

Job Compensation - Pay Components

*Salary Type **3** Compensation Rate

Compensation A Frequency

Here is an example of the Salary Distribution entry for a \$0 Stipend Appointment - page 2 of the hire template.

- 1) Enter the "Combination Code" for the funding (even though there are no actual dollars allocated)
- 2) Enter the Funding End Date
- 3) Enter "100" in the Percent of Distribution field

Salary Distribution - 1a

Combination Code Funding End Date

Description

Combo Code Department

Combo Code Amount Percent of Distribution

I-9 Validation

In the **Validation of I-9** section, check the "**Completion of I-9 Validation**" box if the employee completed *Section 2* of their I-9. On or before the first day of employment, employees should complete Section 1 of the Form I-9 online and electronically sign the form. Once Section 1 is completed, the list of acceptable documents for Section 2 are presented. The employee is to bring the required documents to an I-9 Center at the University **within 3 business days of the start date** or by the first day of their class for faculty on the Morningside campus in order to complete Section 2 of the I-9 in person. In the Comments area, note the date that Section 2 was completed: "I-9 completed MM/DD/YYYY"

What is the I-9 form, and Why do Employees Need to Complete One?

An I-9 Form is the Employment Eligibility Verification Form required by the Department of Homeland Security (DHS) to verify an employee's identity and eligibility to work. All employees receiving salary must complete this form and provide valid original identifications. Employees are not eligible for pay until they have completed the I-9. For more information, visit the U.S. Citizenship and Naturalization Services website, a branch of DHS.

How Do I Know if the Employee Completed the I-9?

For departments that have Form I-9s completed in a central location (Kent, CUMC HR, Studebaker, etc.) this field will be completed by a 1st or 2nd level approver who verifies I-9 in I-9 Management. If there is a completed I-9 in I-9 Management, then:

- 1st level approvers - check the "**Completion of I-9 Validation**" box
- 2nd level approvers - enter the date and a comment in the Comments box (as they cannot update the form)

For departments that are also I-9 centers, the Initiator or 1st level approver may check the "**Completion of I-9 Validation**" box upon verification by either verifying I-9 in I-9 Management or viewing the employee receipt of completion. **NOTE:** The University does not keep copies of the employee's I-9 receipt nor should it be an attached document for the hire.

Validation of I-9
<input checked="" type="checkbox"/> Completion of I-9 Validation

CU I-9 Service Centers

Morningside Campus:

- 210 Kent Hall
- 4th Floor Studebaker, 615 West 131st Street

Lamont-Doherty Earth Observatory: 205 Administration

Medical Center:

- **CUMC Human Resources** — Black Building, Room 101
- **Medicine** — PH 8 West Room 862
- **Mailman School of Public Health** — 600 W. 168th, 7th Floor
- **Pediatrics** — PH 17th floor – room 201
- **Surgery** — 21 Audubon Avenue, 2nd floor, Suite 209
- **Psychiatry** — 1051 Riverside Drive, Unit 5
- **OB/GYN** — PH 16021
- **College of Dental Medicine** — P&S 7th Floor

Affirmative Action

In the Affirmative Action section enter the following information, as applicable.

- **AA Clearance** - click the drop down arrow and select one of the following: Full Clearance or Limited Clearance
- **Effective Date** - enter the effective date of the clearance. This should be on or before the employee's hire date
- **Expiration Date** - if the Affirmative Action Clearance is Limited, you will need to enter the Expiration Date of that clearance. Full Clearance does not have an expiration date and thus does not require a date be entered

Is This Section Completed for all Employees?

This section is required for all administrative positions (all grades) and for all full-time faculty, officers of research, officers of the libraries and certain postdoctoral appointments. Part-time academic personnel do not need clearance so the section for them should be left blank.

Visit the [Equal Opportunity and Affirmative Action website](#) for more information.

How Do I Know if the Affirmative Action Clearance Process Completed?

- For administrative hires, the clearance type and effective date is listed in Jobs at Columbia (JAC)
- For academic hires, the clearance type and effective date is listed in the Recruitment of Academic Personnel System (RAPS)

Affirmative Action	
AA Clearance	Full Clearance <input type="button" value="v"/>
Effective Date	07/01/2014 <input type="button" value="x"/> <input type="button" value="B1"/>
Expiration Date	<input type="text"/> <input type="button" value="B1"/>

Attach Documents

Attaching documents electronically eliminates the need to send paper documents between offices. You can attach as many documents as needed to an employee's template-based hire form. In this step, you will attach the documents that you scanned to your department secured drive. Refer to the *Getting Started* lesson for information on grouping and scanning documents. Remember, original documents and scanned copies should be kept in the department for 3 - 4 months after confirming the person is hired into the PAC system. All attached TBH documents are retained in PAC indefinitely and copies of any submitted document can be obtained through a request to the HRPC.

Be sure to attach all documents. HRPC will recycle the transaction back if any documents are missing. Also ensure that the NYS 195 Form is completed correctly and is properly signed and dated.

Steps:

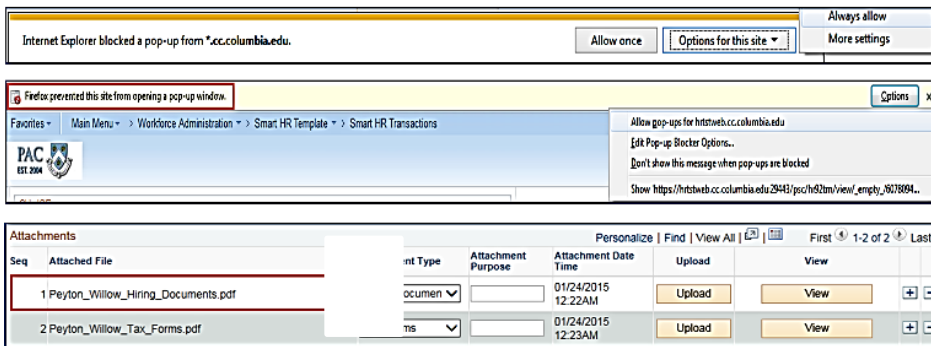
Attaching documents to a template is similar to attaching a document to an e-mail. You attach documents to the transaction by accessing the documents you have scanned into your computer's encrypted local hard drive or the department's secure share drive. You then can navigate to the saved documents and attach them to the form. To attach documents, follow these steps:

1. In the attachments section of the hire template, indicate the attachment type by selecting the category from the drop down list under attachment type
2. Click the "Upload" button
3. Click "Browse" and navigate to the folder where the scanned document(s) are saved
4. Select the document or package of documents to attach. The name of the attached file is shown in the attached file window. E.g. R_Jones_Hiring Documents
5. Click the "Upload" button
6. Click the "View" button to see the attached documents (to confirm the correct documents are attached)
7. Click the "+" button to add another row to attach additional documents
8. If needed, click the "-" button to delete attached documents

Notes:

- Allow pop-ups from the Columbia site by making *ais.columbia.edu a trusted site on your computer. This allows the PAC system to communicate with your computer and you can see the attachments
- Do not save documents with a very long title as this may "push out" the "+" and "-" buttons and thus not be able to add more documents
- Refer to the *Attaching Documents* job aid in the Course Catalog (<http://hr.columbia.edu/course-catalog/search>) on the HR Website for a listing of document categories and the order in which they must be attached
- *Remember:* Original documents and scanned copies should be kept in the department for 3 - 4 months after confirming the person is hired into the PAC system. All attached TBH documents are retained in PAC indefinitely and copies of any submitted document can be obtained through a request to the HRPC

Morningside Academic Hires Categories - there are two categories used for hiring academic personnel on the Morningside Campus. They are the *Academic Hiring Documents (AHD)* and *Academic Appointment Supporting Documents (AASD)*. For guidance on the documents to include in each category and the order in which they must be attached, please access the "Attaching Documents in Template Based Hire (TBH) Job Aid" on the HR Website.



The screenshot shows a web browser interface. At the top, an Internet Explorer message states: "Internet Explorer blocked a pop-up from *.cc.columbia.edu." with buttons for "Allow once", "Options for this site", "Always allow", and "More settings". Below this, a Firefox message says: "Firefox prevented this site from opening a pop-up window." with an "Options" button. The browser's address bar shows a URL from htstweb.cc.columbia.edu. Below the browser, there is a table titled "Attachments" with the following data:

Seq	Attached File	Document Type	Attachment Purpose	Attachment Date Time	Upload	View
1	Peyton_Willow_Hiring_Documents.pdf	Document		01/24/2015 12:22AM	Upload	View
2	Peyton_Willow_Tax_Forms.pdf	Document		01/24/2015 12:23AM	Upload	View

To view documents you attached, allow pop-ups from this site. Perform this step before beginning entry.
Above example is the Internet Explorer message and below is the Mozilla Firefox message.

Clinical Data Fields - For CUIMC Clinical Appointments

This module applies to individuals who have a clinical appointment. If the individual has a clinical appointment, the data fields that capture clinical data must be completed.

Remember, the CUIMC Academic Hire and Rehire templates are used to hire or rehire **ALL** academic personnel at the Columbia University Irving Medical Center. These templates are used for both clinical and non-clinical positions. For clinical positions, complete the clinical data fields on the form. For academic appointments with no clinical role, the clinical data fields are left blank.

The following lessons review the clinical data fields and how they are completed.

- For CUIMC Academic hires, if the hire is in a non-clinical position, you can enter information regarding any research fellowships they completed
- If you process Administrative Hires or Morningside Academic Hires, skip this module and continue with the "Comment Section and Review Entry" module

Postdoctoral Data

There are two Postdoctoral Data sections where you can enter information.

- **Training Type.** Select the type of postdoctoral training the individual completed. The choices are: postdoctoral clinical fellow, postdoctoral research fellow or postdoctoral residency fellow
- **Start Date.** Enter the start date of the postdoctoral training
- **End Date.** Enter the end date of the postdoctoral training
- **School Code.** Select the code of the school where the individual completed the postdoctoral training
- **School Description.** This field information defaults based upon the school code selected
- **Program Code.** Select the code indicating the type of postdoctoral program the individual completed
- **Program Description.** This field information defaults based upon the program code selected

Tip: School codes that begin with an "H" are hospitals and school codes that begin with an "I" are institutes.

Postdoctoral - 01	
Training Type	PD-RSDCY
*Start Date	07/01/1996
*End Date	06/30/2002
School Code	H249136
School Description	MA GEN HOSP
Program Code	PD-0330
Program Description	MEDICINE, GENEI
Postdoctoral - 02	
Training Type	PD-CLIN
*Start Date	07/01/1999
*End Date	06/30/2002
School Code	2562
School Description	NEW YORK UNIVE
Program Code	PD-0212
Program Description	Gastroenterology

Participation Data

In this section, click the drop down arrow to the right of the field and select the option that indicates the practice plan membership the individual holds. Choices include:

- **CFPO.** Columbia Faculty Practice Organization
- **IPA.** Individual Practice Agreement
- **None**

Participation	
Practice Plan Participation	<input type="text" value="CFPO"/>

Voting Privileges

Enter the effective date and voting department in this section if the individual has faculty council voting privileges.

- **Faculty Council Voting Privileges.** Check the box to indicate the individual has voting privileges
- **Effective Date.** Enter the effective date of the voting privileges
- **Voting Department.** Enter the department number where the individual has voting privileges

Note: Voting privileges for the individual are in the department specified in the Memorandum of Agreement (MOA).

Voting Privileges	
<input checked="" type="checkbox"/> Faculty Council Voting Privil.	
Effective Date <input type="text" value="07/01/2014"/>	Voting Department <input type="text" value="7518101"/>

Appointment

In this section, enter the Non-Renewal effective date of the appointment for an individual whose appointment will not be renewed, otherwise, leave blank. If this applies, the individual will also receive a letter of non-renewal. ***This field is completed specifically for those who are in a one year appointment.***

- **Non Renewal Eff Dt.** Enter the effective date of the appointment

Appointment	
Non Renewal Eff Dt	<input type="text"/> 

Reciprocal Appointments - Cornell

The Home Institution is a required field and must be entered for individuals who have reciprocal appointments with Cornell **and also** for those who do not. Enter into this field as follows:

- For employees who do not have reciprocal appointments, select "Columbia" as the Home Institution. Do not leave the field blank
- For employees who do have a reciprocal appointment with Cornell, select either "Columbia" or "Cornell" as the Home Institution to indicate the home institution. *If Cornell is the home institution, be sure to select "Cornell" from the list*

Reciprocal Appointments - Cornell	
*Home Institution	<input type="text" value="Columbia"/> 

Hospital Affiliation

There are up to three Hospital Affiliation sections where you can enter information about where our faculty member is practicing.

- **Appointment Type.** Click the drop down arrow to the right of the field and select the type of appointment the individual holds. Choices include: Hospital Affiliate, Medical Service Agreement (MSA) or Reciprocal. *If the individual holds a reciprocal appointment with Cornell, "Reciprocal" will be selected here.*
- **Affiliated Hospital.** Select the hospital where the individual holds the affiliation.
- **Hospital Hire Date.** Enter the hire date of the hospital appointment.
- **Hospital Appointment End Dt.** Enter the end date of the hospital appointment.
- **Service Code.** Select the service code that indicates the type of service performed for the appointment.
- **Description.** This field defaults based upon the service code selected.
- **Hospital Title.** Select the hospital title code that indicates the title the person holds at the hospital.
- **Description.** This field information defaults based upon the hospital title code selected.
- **Position Effective Dt.** Enter the hire date of the position.
- **Admitting Privileges.** Check this box if the person has admitting privileges at the hospital.
- **Visiting Fellow Rotator.** Check this box if the person is a visiting fellow rotator at the hospital.
- **Cornell Univ Title.** Select the Cornell University title, if applicable. *Access the [Cornell University Titles Job Aid](#) on the HR Website for more information.*
- **Description.** This field information defaults based upon the Cornell University title code selected.

Hospital Affiliation - 01	
Appointment Type	Hospital Affiliate
*Affiliated Hospital	008
Hospital Hire Date	07/01/2014
Service Code	042
Hospital Title	507
Position Effective Dt	07/01/2014
<input type="checkbox"/> Admitting Privileges	<input type="checkbox"/> Visiting Fellow Rotator
Cornell Univ Title	
Description	New York Presbyterian
Hospital Appt End Dt	06/30/2015
Description	Medicine - Cardiology
Description	Assistant Attending
Hospital Affiliation - 02	
Appointment Type	Hospital Affiliate
*Affiliated Hospital	033
Position Effective Dt	
<input type="checkbox"/> Admitting Privileges	<input type="checkbox"/> Visiting Fellow Rotator
Cornell Univ Title	
Description	Stamford Hospital

In this example, the physician practices at both Presbyterian and Stamford Hospitals. For the Stamford information, enter the Hospital Affiliate and the Affiliated Hospital. The remaining fields do not need to be completed.

Reciprocal Appointments - Cornell

*Home Institution Columbia

Hospital Affiliation - 01

Appointment Type Reciprocal

*Affiliated Hospital 008 Description New York Presbyterian

Hospital Hire Date

Service Code

Hospital Title

Position Effective Dt

Admitting Privileges Visiting Fellow Rotator

Cornell Univ Title 028 Description Adj Clinical Asst Professor

For those whose Home Institution is Columbia and they hold a reciprocal appointment at Cornell, select:

- "Columbia" from the Home Institution drop down list
- "Reciprocal" from the Appointment Type drop down list
- "NYP" from the Affiliated Hospital search list and
- "The Cornell Univ Title" from the Cornell Univ Title search list - E.g. "Adj Clinical Asst Professor"

Reciprocal Appointments - Cornell

*Home Institution Cornell

Hospital Affiliation - 01

Appointment Type Reciprocal

Affiliated Hospital 008 Description New York Presbyterian

Hospital Hire Date

Service Code

Hospital Title

Position Effective Dt

Admitting Privileges Visiting Fellow Rotator

Cornell Univ Title 008 Description Assistant Clinical Professor

For those whose Home Institution is Cornell and they hold a reciprocal appointment at Columbia, select:

- "Cornell" from the Home Institution drop down list
- "Reciprocal" from the Appointment Type drop down list
- "NYP" from the Affiliated Hospital search list and
- "The Cornell Univ Title" from the Cornell Univ Title search list - E.g. "Assistant Clinical Professor"

Comment Section and Review Entry

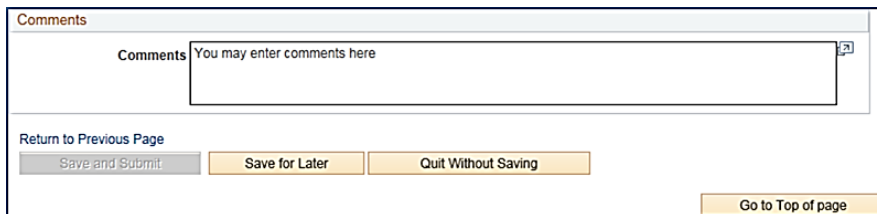
Comment Section

If you would like to add a comment to the transaction that will be viewable to all roles (Initiator, Approver and HRPC), you can do so by entering text in the Comments field at the end of page 1 of the form. The comment is visible when the form is opened and viewed. The comment will not display in the approver worklist page. Comments are viewable to all roles in the transaction workflow unless they are deleted. Once HRPC adds the employee to PAC, the comments are removed from the transaction and are no longer viewable or retrievable.

Review Entry

An important step in the hire transaction entry process is to review and confirm the information entered before moving to page 2 and submitting the transaction to an approver. To review entered data:

- scroll through page 1 of the template and confirm all entered information
- confirm that all required documents are attached to the template



Comments

Comments You may enter comments here

Return to Previous Page

Save and Submit Save for Later Quit Without Saving

Go to Top of page

Complete Financial Accounting Information on Page 2

Now that you reviewed and confirmed that the information on page 1 is correct, you are ready to move to page 2 of the template where the Financial/Accounting information is entered.

- Click the "**Labor Accounting**" tab. Edits will run to check that all required fields were completed. Review any error messages that appear and make any corrections, as needed
- Enter the Salary Distribution - required for template submission
- Enter any Additional Compensation payments known at the time of hire - not required for template submission
- If an additional compensation is added please note in Comments section, "Add Comp included"

Note:

Training on how to complete page 2 of the Hire/Rehire templates is located on the HR Website.

Print the Template

A Print button is located on the bottom of each page of a template. To print the template, click the Print button and a new tab appears in the browser containing a "pdf" document of the printed version. Using the browser's print command, you can print the template which is displayed in three pages.

Note that on the printed document the Social Security Number appears as XXX-XX-2345, with the first 5 numbers masked and the last 4 displayed. It is very important to make sure that the Social Security number entered on the template matches the Social Security Number on the tax forms. Also make sure that the Social Security Number on all tax forms match.

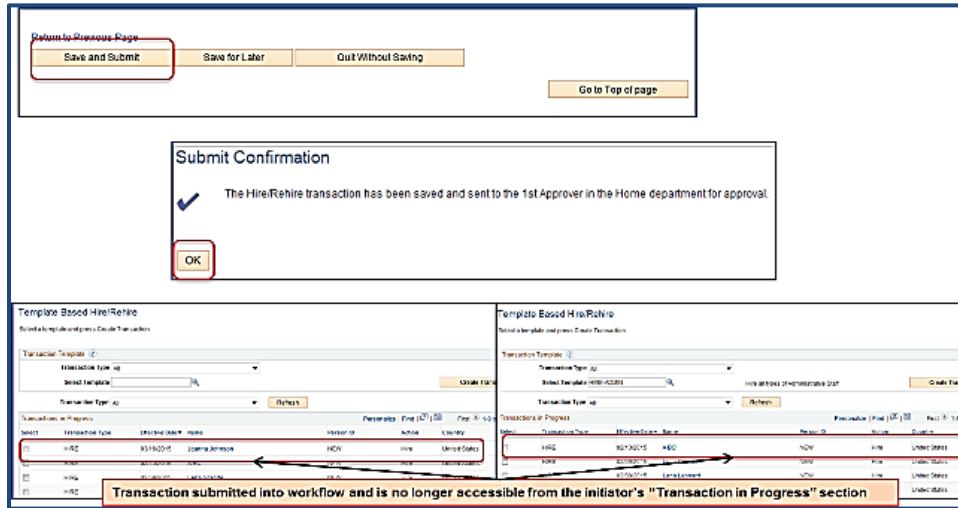
When the Print button is pressed, the template also saves any new entries made since the last time 'Save for Later' was pressed.

Submit the Transaction

Now that the template is complete, you are ready to submit the form into the workflow for approval.

To do this, click on the **"Save and Submit"** button, then click **"OK"** to the Submit Confirmation message and the transaction will electronically move into the Approvers worklist and will be removed from the "Draft Hires to Process" section of your main page.

Once you submit the transaction into workflow, you cannot retrieve it unless the 1st level approver recycles it back to you.



Initiator Notifications

As an Initiator you will receive an e-mail notification when a transaction that you created has the following action made to it:

- **Recycled** to you (by your 1st level approver)
- **Final Approval** was received by the final approver and the transaction was sent to HRPC
- **Denied** (by any approver in your workflow or HRPC)

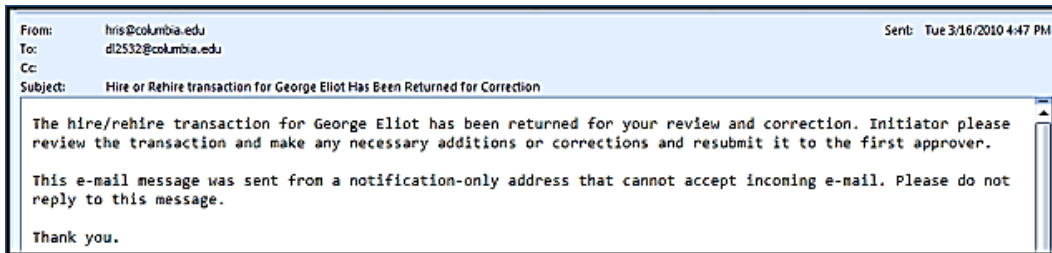
Where are the transactions now?

- **Recycled** - the transaction is in your Draft Hires to Process section for access and updating
- **Final Approval** - the transaction is in the HRPC work list
- **Denied** - the transaction is no longer accessible or retrievable

See the following sections for sample e-mail notifications and status screen prints

Initiator Notification - Recycled Transaction

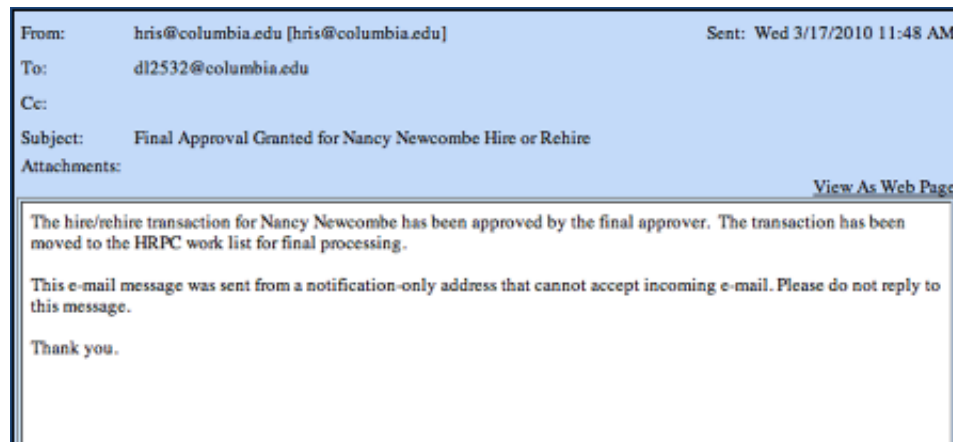
See below for a sample e-mail notification for a recycled transaction for employee "George Eliot".



Initiator Notification - Final Approval and Denied

See below for sample e-mail notifications of a transaction receiving final approval and sent to HRPC and one for a denied transaction.

Transaction received final approval and was sent to HRPC worklist notification



Transaction was denied by either an approver or by HRPC notification

Note: if this transaction was denied by HRPC the e-mail will be identical except that the end of the 1st sentence would say denied "by HRPC."



Initiator Status Page

On the Hire/Rehire Status page, you can see a snapshot of statuses for transactions you submitted. The statuses include:

- Pending approval means that the transaction is in workflow and pending approval by an approver
- Requested means that the transaction is pending approval by the HRPC
- Cancelled means that the transaction was denied by an approver or the HRPC
- Processed means that the transaction was processed by the HRPC

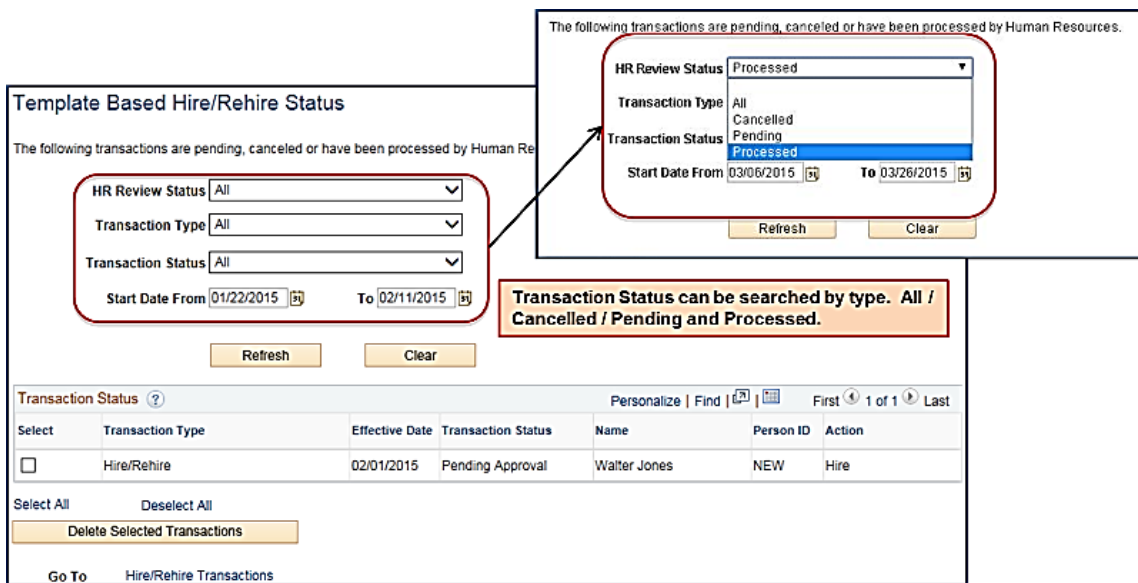
Notes:

- You cannot access transactions from the status page. It is a snapshot of submitted transactions
- This is an Initiator status page. You can see transactions here that you submitted as an Initiator. If another Initiator submitted the transaction, you will not see it on this page
- If you are also an Approver, you can see statuses of transactions in the Worklist Status Page and also the location of transactions in the Workflow Status Page. See the Approver Lesson for more information on these pages

Access the Initiator Status Page

Access the Hire/Rehire Status page by clicking the link within the Job and Personal Information folder within the Manager Self Service folder.

Sample View of a Template-Based Hire Status Page



The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status: (dropdown)

Transaction Type: (dropdown)

Transaction Status: (dropdown)

Start Date From: To:

Refresh Clear

Transaction Status can be searched by type. All / Cancelled / Pending and Processed.

Refresh Clear

Select	Transaction Type	Effective Date	Transaction Status	Name	Person ID	Action
<input type="checkbox"/>	Hire/Rehire	02/01/2015	Pending Approval	Walter Jones	NEW	Hire

Select All Deselect All

Delete Selected Transactions

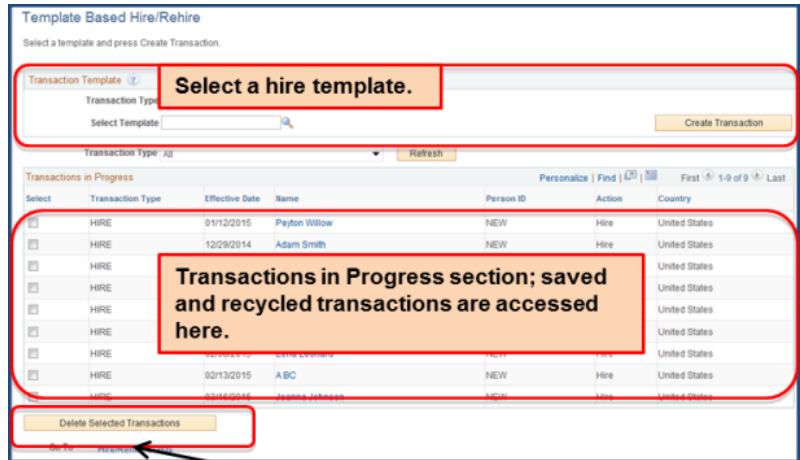
Go To Hire/Rehire Transactions

Additional Main Page Actions

In addition to selecting a template to initiate a hire or accessing saved and recycled transactions, there are additional buttons and actions available to you on the main Template-Based Hire page that you can use to manage transactions. Below is a visual and explanation of these options.

The "Delete Select Names" Button:

Clicking on this button will delete any transactions that were checked. Doing this will delete the transaction(s) and remove them from the Transactions in Progress section. This feature is useful if it is decided that the employee will not be hired and you need to remove the saved entry. You can begin re-entry of the transaction, if needed, in a new template.



To delete a transaction. Click the box on the line of the transaction then press the "Delete Selected Transactions" button. This deletes the selected transaction(s) and will remove your entry entirely and cannot be accessed again.

Check Your Understanding: Enter a New Hire - The Initiator Role

Fill in the Blanks/True or False/Yes or No/Short Answer/Post Lesson Activity:

1. It is important to select the correct template at the initial selection because once data is saved into a template it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template. TRUE or FALSE
2. Morningside/LDEO /Nevis/Manhattanville only. The Morningside Academic Hire and Rehire templates are used to hire or rehire all academic personnel on the Morningside, Lamont Doherty Earth Observatory (LDEO), Nevis and Manhattanville campuses. TRUE or FALSE
3. The Administrative Hire and Rehire templates are used to hire or rehire all administrative positions regardless of campus. TRUE or FALSE
4. CUMC only. The CUMC Academic Hire and Rehire templates are used to hire or rehire ALL academic personnel at the Columbia University Medical Center. These templates are used for both clinical and non-clinical positions. TRUE or FALSE
5. CUMC only. For CUMC academic and clinical positions, are all clinical data fields on the form completed? YES or NO
6. If you are hiring an employee for multiple jobs or a 2nd job, you can use the electronic hire or rehire templates? YES or NO
7. If you are entering a new hire and the Social Security Number is currently in use by a Columbia University employee, can the electronic *hire* template be used? YES or NO
8. Is a Mailing Address required for all hire entries? YES or NO

9. What is a Check Address and Check Sequence Code? _____.

10. Must the entry of the highest education degree earned by the employee match the highest education level? YES or NO

11. The Administrative (or Admin or Home) Department for an employee is _____.

12. The Complete University Title field is a free form field which is an optional entry for all positions? TRUE or FALSE

13. The _____ Rate field is where the employee's pay is entered. This information feeds to _____ and is used to calculate an employee's regular earnings.

14. Employees must complete *Section 2* of their I-9 Form within 3 business days of their start date? TRUE or FALSE

15. If you save a transaction to complete it at a later time, where is it saved and how do you access it? _____.

16. Can you access transactions from the Template-Based Hire Status page? YES or NO

17. What are three types of initiator notifications received from the system and where are the transactions? _____.

Post Course Activity:

Discuss the following with your supervisor/manager:

1. What employee types are hired in your department?
2. Are there any hiring specifics that I will encounter frequently? E.g. tenure types for different types of academic appointments, dates used for partial year, partial semester or summer session academic hires.
3. If possible, review examples of prior hires

Answer Key: Enter a New Hire - The Initiator Role

Below are the answers to the Check Your Understanding: Enter a New Hire in TBH - The Initiator Role questions:

1. It is important to select the correct template at the initial selection because once data is saved into a template it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template. **TRUE** or FALSE
2. Morningside/LDEO/Nevis/Manhattanville only. The Morningside Academic Hire and Rehire templates are used to hire or rehire all academic personnel on the Morningside and Lamont Doherty Earth Observatory (LDEO) /Nevis/Manhattanville campuses. **TRUE** or FALSE
3. The Administrative Hire and Rehire templates are used to hire or rehire all administrative positions regardless of campus. **TRUE** or FALSE
4. CUMC only. The CUMC Academic Hire and Rehire templates are used to hire or rehire ALL academic personnel at the Columbia University Medical Center. These templates are used for both clinical and non-clinical positions. **TRUE** or FALSE
5. CUMC only. For CUMC academic and clinical positions, are all clinical data fields on the form completed? YES or **NO**. **The clinical data fields apply to individuals who have a clinical appointment. If the individual has a clinical appointment, the data fields that capture clinical data must be completed. For academic appointments with no clinical role, the clinical data fields are left blank. If the hire is in a non-clinical position, you can enter information regarding any research fellowships they completed.**
6. If you are hiring an employee for a multiple job or a 2nd job, can the electronic hire or rehire templates be used? YES or **NO**. **To hire someone into a multiple job/ appointment or 2nd job, submit a paper PAF, or Nomination Form (for additional academic appointments or academic administrative appointments) for the transaction.**

7. If you are entering a new hire and the Social Security Number is currently in use by a Columbia University employee, can the electronic *hire* template be used? YES or NO. **If there is a match and the SSN is currently in use by a Columbia University employee, an error message will appear saying that this SSN is already in use for an employee and will provide the Employee ID. If you receive this message, review what type of transaction should be taking place:** check that you entered the correct SSN, or if this is for a multiple job or appointment or a 2nd job, submit a paper PAF, or Nomination Form (for additional academic appointments or academic administrative appointments) for the transaction, or, if the person is a rehire, take note of the Employee ID and use the Rehire template to enter the transaction.

8. Is a Mailing Address required for all hire entries? YES or NO. **A mailing address is the *local* home address of employees, students, visiting faculty/researchers or non-resident aliens. Enter the employee's mailing address only if the current address is different from the home/permanent address (otherwise leave blank). For people on a visa, who have filed for tax treaty status, Mailing Address should reflect where they currently live locally in the US.**

9. What is a Check Address and Check Sequence Code? **A Check Address is the *delivery* location for the employee's check, usually the location of the Departmental Administrator. A Check Sequence Code indicates the employee's department/location of the check address. The codes are based on the pre-7/2012 department numbers. If you do not know the prior department number and address location, refer to the *Check Sequence Code Listing Job Aid*) on the HR Website**

10. Must the entry of the highest education degree earned by the employee match the highest education level? YES or NO. **Yes, they must match. Additional degrees entered need to be in chronological order.**

11. The Administrative (or Admin or Home) Department for an employee is **The administrative department for the employee defaults based on the position number entered. The template will route in the workflow path for this department. This field can be changed to identify an administrative department different from the position department if needed**

12. The Complete University Title field is a free form field which is an optional entry for all positions? TRUE or FALSE. **The Complete University Title field is a free form field which is an optional entry for administrative positions and a mandatory entry for faculty, officers of research, and officers of the libraries. It should not be used for student officers.**

13. The **Compensation** Rate field is where the employee's pay is entered. This information feeds to **Payroll** and is used to calculate an employee's regular earnings.

14. Employees must complete *Section 2* of their I-9 Form within 3 business days of their start date? **TRUE** or **FALSE**. **An I-9 Form is the Employment Eligibility Verification Form required by the Department of Homeland Security (DHS) to verify an employee's identity and eligibility to work. All employees receiving salary must complete this form and provide valid original identifications. Employees are not eligible for pay until they have completed the I-9. For more information, visit the U.S. Citizenship and Naturalization Services website, a branch of DHS.**
15. If you save a transaction to complete it at a later time, where is it saved and how do you access it? **On the "Draft Hires to Process" section of the main page.**
16. Can you access transactions from the Template-Based Hire Status page? YES or **NO**. **You cannot access transactions from the status page. It is a snapshot of submitted transactions.**
17. What are three types of initiator notifications received from the system and where are the transactions? **As an Initiator you will receive an e-mail notification when a transaction that you created has the following action made to it:**
- **Recycled to you (by your 1st level approver) - the transaction is in your Draft Hires to Process section for access and updating**
 - **Final Approval was given by the final approver and the transaction was sent to HRPC. The transaction is in the HRPC work list**
 - **Denied (by any approver in your workflow or HRPC) - the transaction is no longer accessible or retrievable**

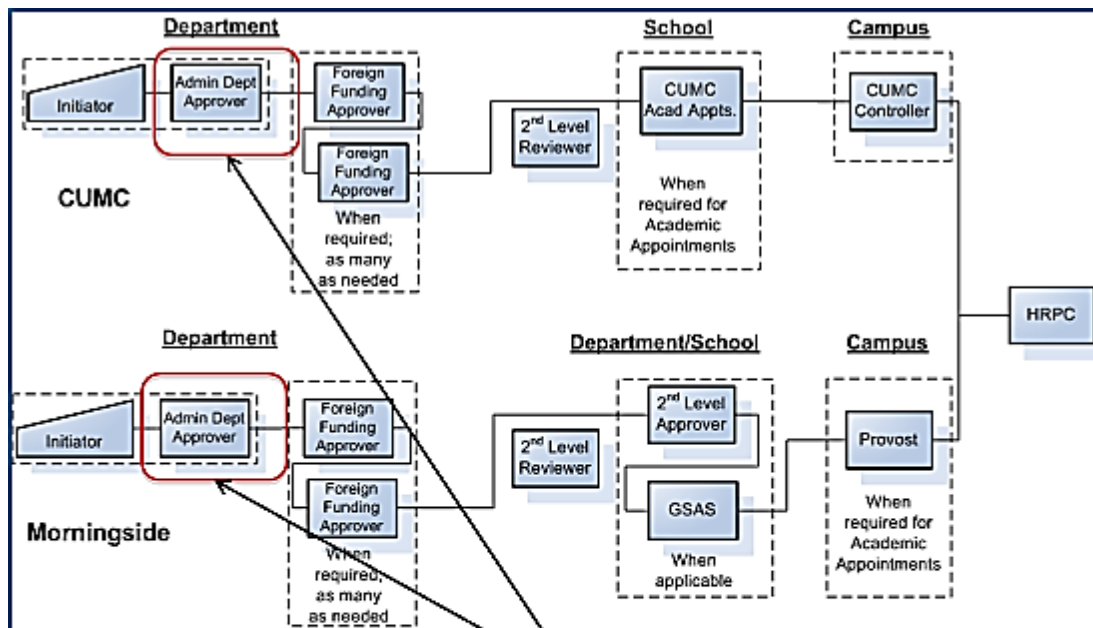
Review a Hire Entry - The Approver Role

This is the *Review a Hire Entry - The Approver Role* lesson of the *Template-Based Hires Page 1* course. Upon completion of this lesson, you will be able to:

- Access, review and perform the approver actions for a hire transaction

Note: If you are not an approver, you may continue the course by reviewing the topics, "1st Level Approver Actions" and "Subsequent Level Approver Actions" to see what actions an approver can take on a transaction and how a transaction can be recycled back to you. After viewing those topics, please continue the course beginning with the "HRPC Review" topic which is in this lesson.

Estimated Time to Complete Lesson: 20 minutes



We are here in the workflow. The 1st level approver in the Admin (home) department:

- verifies the hire is in line with the policies and procedures of the University
- reviews the data entered by the initiator to ensure it is complete and accurate
- confirms the required documents are attached
- updates or recycles the form to the Initiator for updating any needed or missing information
- approves or denies the transaction

Approver Levels and Workflow

Now that the hire template was submitted into the workflow, it is ready for review and approval. The first stop in the workflow is at the 1st level approver in the Admin (or Home Department).

Do you recall what a workflow is and the roles, approval levels and actions an approver can make on a transaction?

A workflow is the routing of transactions based on rules. Workflow is used in PAC to obtain approvals and route transactions. Access the *TBH Workflow* and *TBH Roles and Actions* lessons for reference on the specific roles, approval levels and approver actions.

Access the Hire Transaction

Let's practice reviewing transaction data and approving Initiator entries. The process begins by accessing transactions in your worklist.

What is a Worklist?

The Worklist is a shared PAC page that displays all transactions pending your approval. All approvers in a department can see transactions for the approval level held and per the department access. For example, a level 1 TBH approver will see all Template-Based Hire transactions pending level 1 approval. A level 2 TBH approver will see all Template-Based Hire transactions pending level 2 approval. When a transaction is routed in the workflow, it is put into the worklist.

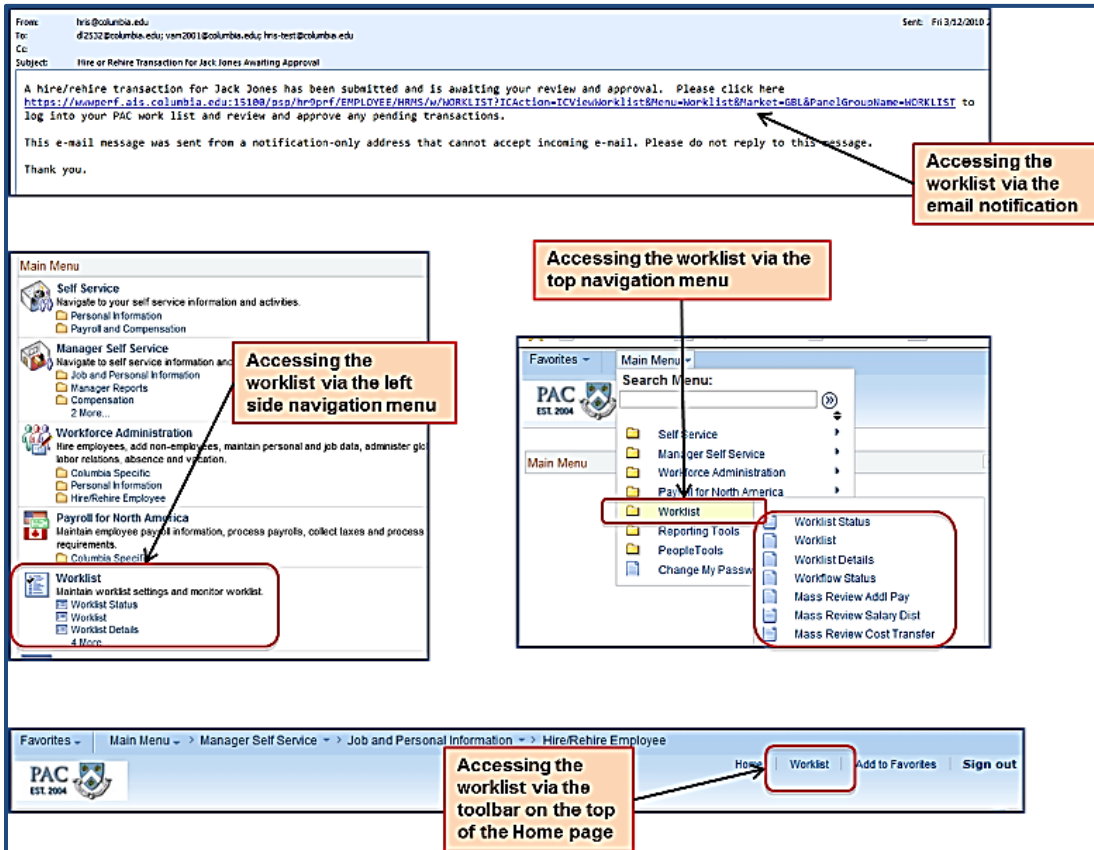
Access the hire transaction ready for your review

- You will receive an e-mail notification from PAC once there is a transaction ready for review. This notification is part of the electronic workflow and is determined by the administrative department of the position being hired. Click the link in the email to access the worklist
- Once you log in to the PAC application, you can also access your worklist by clicking on "Worklist" from the main menu (either from the left side menu or the horizontal menu) or by clicking on "Worklist" from the toolbar
- Select the employee transaction you want to review by clicking on the link for that employee
- The "Hire Details" information appears for the hire transaction

Note: If there are several 1st Level Approvers in your department, the hire transaction will appear on all 1st Level Approver's worklists, for that department. If an approver opens a transaction and just looks at the data without making any updates, and then closes the form, the transaction will remain in all 1st Level Approver worklists. If an approver opens a transaction and makes an update to the form, saves the changes, but does not approve or recycle the transaction and then closes the form, it will remain in all 1st Level Approver worklists. If two 1st Level approvers happen to open the same transaction from the worklist at the same time, the approver who accessed it first will be able to continue working. The other approver will receive a system message that they are unable to process the transaction if they try to "save" or "save and submit." Also, once a transaction has been approved, it will be removed from all worklists for that level.

e-mail notification to the 1st Level Approver that there is a transaction ready for review

When you receive the e-mail notification that there is a transaction awaiting approval, you can simply click on the link in the e-mail and you will be brought directly to log in to your worklist. To access your worklist from within the application, click the Worklist link from either the top or side menu or from the toolbar.



The image shows an email notification and three application interface views. The email at the top contains a link to the worklist and a callout box: "Accessing the worklist via the email notification". Below the email are three screenshots of the application interface. The first screenshot shows the left navigation menu with a callout: "Accessing the worklist via the left side navigation menu". The second screenshot shows the top navigation menu with a callout: "Accessing the worklist via the top navigation menu". The third screenshot shows the top toolbar with a callout: "Accessing the worklist via the toolbar on the top of the Home page".

Select the Transaction

From your worklist, select the hire transaction that you would like to review. Click on the employee's name. The Hire Details for the transaction displays. Use the worklist columns to help prioritize your work. They can assist you in selecting transactions that must be completed based on closing payroll dates.

You should check your worklist regularly to manage work items.

Worklist
Worklist for ca_d12532: Denise Luciano

[Default View](#) Worklist Filters ▼ [Feed](#) ▼

Worklist Items	Date From	Work Item	Type of Trans	Effective Date	Link	Name	FT/PT	Job Code	Department
Luciano,Denise	12/16/2014	Level 3 Approver	Add Pay Approval	11/01/2014	192844_GerardLauren_10182874_0_2014-12-18_0	Gerard,Lauren	FT	314110	TRAIN02
Luciano,Denise	02/17/2015	Level 3 Approver	Add Pay Approval	01/01/2015	192970_ChoateCatherine_10183856_0_2014-11-29_0	Choate,Catherine	FT	011100	TRAIN01
Luciano,Denise	02/17/2015	Level 3 Approver	Add Pay Approval	01/16/2015	192954_GerardLauren_10183874_0_2014-12-19_0	Gerard,Lauren	FT	314110	TRAIN02
Luciano,Denise	02/17/2015	Level 3 Approver	Add Pay Approval	12/01/2014	192854_StevensonShawna_10183885_0_2014-12-19_1	Stevenson,Shawna	FT	012100	TRAIN02
PAC Training id	12/17/2014	Level 1 Approver	Add Pay Home Dept Approval	12/01/2014	192948_StevensonShawna_10183885_0_2014-12-17_0	Stevenson,Shawna	FT	012100	TRAIN02
PAC Training id	12/18/2014	Level 1 Approver	Add Pay Home Dept Approval	12/01/2014	192951_StevensonShawna_10183885_0_2014-12-18_0	Stevenson,Shawna	FT	012100	TRAIN02
PAC Training id	12/22/2014	Level 1 Approver	Add Pay Home Dept Approval	12/01/2014	192857_ThorwoodNathaniel_10183898_0_2014-12-22_0	Thorwood,Nathaniel	FT	012100	TRAIN02
PAC Training Id	03/18/2015	Level 1 Approver	Add Pay Home Dept Approval	02/01/2015	192979_CookeMichael_10183861_0_2015-03-18_0	Cooke,Michael	FT	210400	TRAIN01
PAC Training Id	03/18/2015	Level 1 Approver	Add Pay Home Dept Approval	03/01/2015	192930_CookeMichael_10183861_0_2015-03-18_1	Cooke,Michael	FT	210400	TRAIN01
PAC Training Id	03/19/2015	Level 1 Approver	Add Pay Home Dept Approval	02/01/2015	192981_SullivanSteven_10183864_0_2015-03-19_0	Sullivan,Steven	FT	317101	TRAIN01
Denise Luciano	03/17/2015	Level 2 Approver	Hire/Rehire Approval	02/09/2015	192958_13040_SmithJohn	Smith,John	FT	010100	521200X
PAC Training ID	02/01/2015	Level 1 Approver	Hire/Rehire Home Dept Approval	02/01/2015	192958_13043_JonesWalter	Jones,Walter	FT	010100	501000X
Luciano,Denise	03/16/2015	Level 1 Approver	Hire/Rehire Home Dept Approval	3/18/2015	192979_13043_GrantGina	Grant,Gina	FT	317101	752110X
Denise Luciano	03/16/2015	Level 1 Approver	Hire/Rehire Home Dept Approval	3/18/2015	192992_13070_JohnsonJoanna	Johnson,Joanna	FT	314101	5160112
PAC Training ID	02/16/2015	Level 1 Approver	Add Pay Home Dept Approval	2/16/2014	192934_StevensonShawna_10183885_0	Stevenson,Shawna	FT	012100	TRAIN02
PAC Training ID	10/01/2015	Level 1 Approver	Add Pay Home Dept Approval	10/01/2015					TRAIN02
PAC Training ID	10/01/2015	Level 1 Approver	Add Pay Home Dept Approval	10/01/2015					TRAIN01

Template Based Hire/Rehire

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

Name Walter Jones


Template Hire Academic Officers (CUMC)

Organizational Relationship Employee

Country United States

Category Code Academic/Clinical Positions

***Employee ID**

***Job Eff Date (Hire Date)** 

Action Hire

To access the transaction, click on the "Employee Name" link

Filtering and Sorting the Worklist

Review *The PAC Worklist* web-based training module for more information on how to filter and sort the worklist.

Review the Hire Transaction Information

The first screen that appears is the Hire Details page. Here you are confirming that the employee's name, hire date and position type data are correct. If the information is correct, click on the **Continue** button to review the rest of the employee data. If the information is incorrect, you would also click on the **Continue** button as the options to recycle or deny the transaction are on the following pages of the template.

You may not be aware of the exact hire date as you do not have the paper documents in front of you. The electronic documents are accessed on the next page where you can confirm the hire date.

Let's go to the next page and access the supporting documents.

Access Electronic Documents

All data is reviewed for completeness and errors. To validate the information, compare the template data to the source data. Recall that the required source documents were scanned and attached to the hire transaction. Here is how to access and view the documents.

Scroll down to the end of the transaction to the Attachments section and click on the "View" button for each attachment. The documents will appear in a separate browser window. You can toggle between the two windows, adjust the size of each browser window to see both the template and the documents on one screen or if you have two monitors, you can display the documents on one monitor while the transaction information is visible on the other monitor.

Attachments							Personalize	Find	View All	First	1-2 of 2	Last
Seq	Attached File	Attachment Type	Attachment Purpose	Attachment Date Time	Upload	View						
1	Peyton_Willow_Hiring_Documents.pdf	Hiring Documen		02/01/2015 5:22PM	Upload	View						
2	Peyton_Willow_Tax_Forms.pdf	Tax Forms		02/01/2015 5:23PM	Upload	View						

Click the View button next to each attachment item and the documents will appear in a separate browser window

Note regarding viewing documents. Remember to allow pop ups from the Columbia site by making *ais.columbia.edu a trusted site on your computer. This allows the PAC system to communicate with your computer and you can see the attachments. Refer to the *Attaching Documents* Job Aid on the HR Website for information.

Confirm Template Data

Now that the documents are viewable, scroll through the template to review and confirm each field of information and that all required documents are attached. If documents are missing or you have additional documents to attach, you may attach them to the transaction or recycle the transaction to the Initiator to attach. Ensure that the documents are clear and clearly readable. Reference the *Attach Documents* lesson for steps on how to attach documents.

Compare the entered template data to the attached documents to ensure accuracy and completeness.

Each template field of information can be confirmed with one of the attached documents. For example, home addresses and Social Security Numbers appear on the tax forms; school and education information appears on resumes or CVs, salary and additional compensation information appears on offer letters, etc.

Note regarding **I-9 data** - verify that an I-9 has been completed.

- If this box is checked that means the Initiator verified that the Form I-9 was completed
- If the box is not checked, verify that the Form I-9 was completed in I-9 Management, if you have access to I-9 Management
- If the Form I-9 was completed, check off the “check-box” next to “Completion of I-9 Validation”
- Remember to add the date that Section 2 was completed on the Comments section as "I-9 completed MM/DD/YYYY"

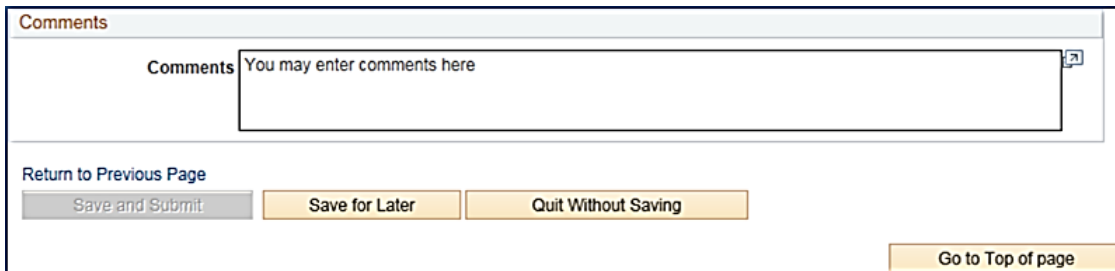
Validation of I-9
<input checked="" type="checkbox"/> Completion of I-9 Validation

Remember that only the Initiator or 1st level approver in the home department can update a template. Therefore, if a role other than the Initiator or 1st level approver in the home department confirms the Form I-9 was completed, they will enter a comment as they cannot update the form by checking off the “check-box” next to “Completion of I-9 Validation”.

Add a Comment (optional)

Read through any entered comments and if you would like to add a comment you can do so by entering text in the Comments field at the end of page 1 of the form. The comment is visible to all roles in the transaction workflow (Initiator, Approver and HRPC), when the form is opened and viewed, unless they are deleted.

The comment will not display in the approver worklist page. Once HRPC adds the employee to PAC, the comments are removed from the transaction and are no longer viewable or retrievable.



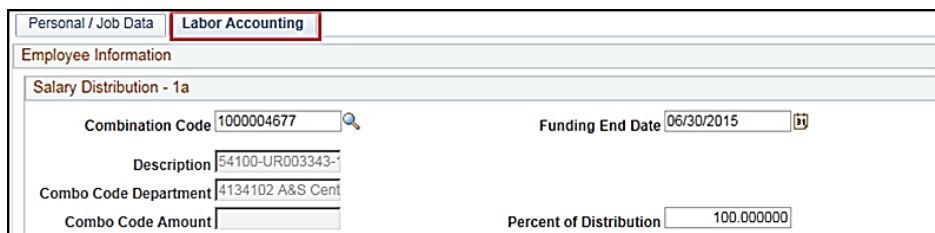
Review the Financial Accounting Information on Page 2

Now that you reviewed and confirmed the information on page 1, you are ready to move to page 2 of the template where the Financial/Accounting information is entered.

- Click the "**Labor Accounting**" tab. Edits will run to check that all required fields were completed, if you happened to make any changes to the data. Review any error messages that appear and make any corrections, as needed
- Confirm the Salary Distribution
- Confirm any Additional Compensation payments known at the time of hire - if applicable

Note:

Training on how to complete page 2 of the Hire/Rehire templates is located in the Course Catalog of the HR Website.



1st Level Approver Actions

At this point you reviewed and validated the information entered into the form and are ready to indicate the approver action. You have 5 options available: **Approve, Deny, Recycle, Save and Quit Without Saving.**



Approve the Transaction – submit to the next level approver

Once you confirm that the information is correct, you are ready to approve the transaction and submit the form to the next level approver for review. To do this, click on the **Approve** button at the bottom of page 2 of the transaction, then click “**OK**”. The transaction will electronically move into the next level Approver(s) worklist and will be removed from your worklist. Recall that this distribution process and access is determined by the established workflow.

- If a foreign department(s) is charged a portion of the salary distribution or additional compensation payment(s), the template will route to the 1st level approver in the foreign department for each foreign department indicated for review and approval
- If no foreign departments are indicated in the salary distribution or additional compensation sections, the template will route to the 2nd level reviewer role, *if established for the department*, and to the 2nd level approver in the home department at the same time

Deny a Transaction

If you determine that this hire transaction should not go through, you can deny the transaction, which will stop the transaction and make it inactive. To do this, click on the Deny button. The transaction will disappear from all worklists and cannot be retrieved.

Recycle a Transaction back to the Initiator

If you determine that there is information in the form that requires a change, you can make this change yourself or you can send it back to the Initiator to make the correction. To do this, click on the Recycle button. The transaction will disappear from your worklist and will be routed to the Initiator in your department who created and submitted the transaction. When a transaction is recycled, the Initiator receives an e-mail notification that the transaction was recycled. This notification does not include the reason for the recycle. Be sure to enter a comment to explain what is needed.

The Save Button

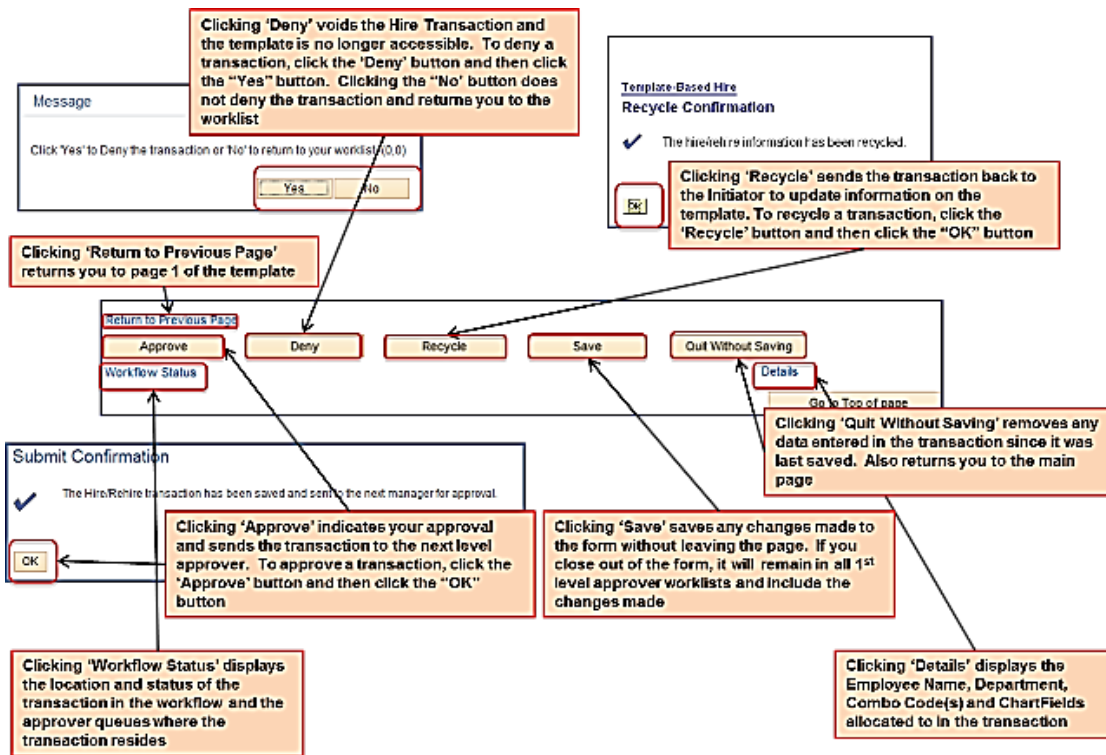
Clicking on this button will save any changes you made to the form without leaving the page. If you close out of the form, it will remain in all 1st Level Approver worklists and include the changes made.

The Quit Without Saving Button

Clicking this button removes any data changes you made to the form *since it was last saved*. Any information you entered, *from the last time it was saved*, will not be saved in the system and any documents you attached will be removed. This action does not remove the transaction from the workflow; it simply brings you back to the form as it was when it was last saved.

1st Level Approver Actions Diagram

The Approve, Deny, Recycle, Save, Quit Without Saving, Return to Previous Page, Workflow Status and Details buttons and links are located at the bottom of page two (2) of the template. Below is a visual and a description of these options.



1st Level Approver Notifications

As a 1st Level Approver, you will receive an e-mail notification when the following actions occur on transactions within your workflow.

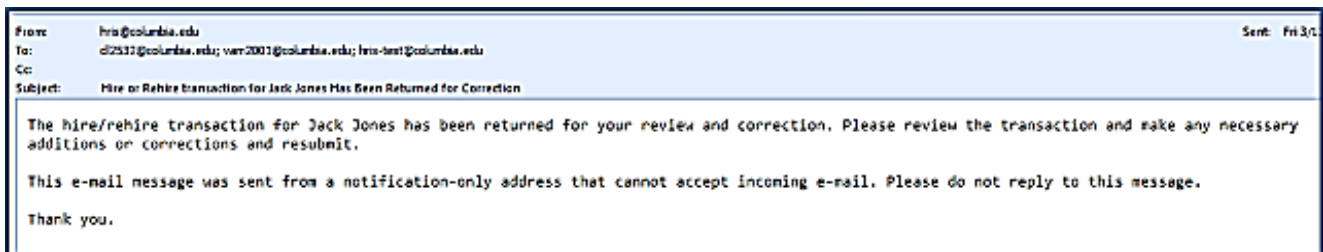
- **Recycled** to you (by any subsequent approver or HRPC)
- **Submitted** (by any Initiator in your workflow)
- **Final Approval** was received by the final approver and the transaction was sent to HRPC
- **Denied** (by any approver in your workflow or HRPC)

Where are the transactions now?

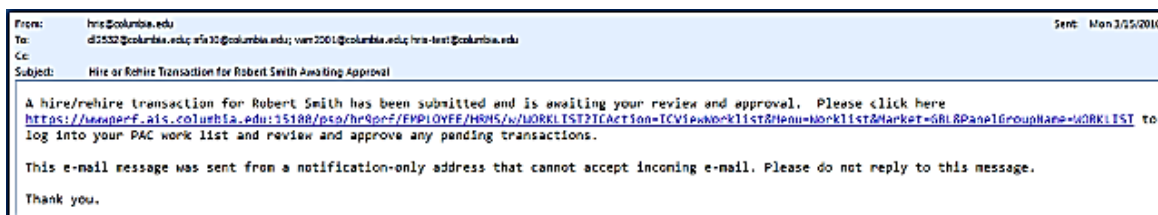
- **Recycled** - the transaction is in your worklist for access and updating
- **Submitted** - the transaction is in your worklist
- **Final Approval** - the transaction is in the HRPC worklist
- **Denied** - the transaction is no longer accessible or retrievable

1st Approver Notifications - Samples

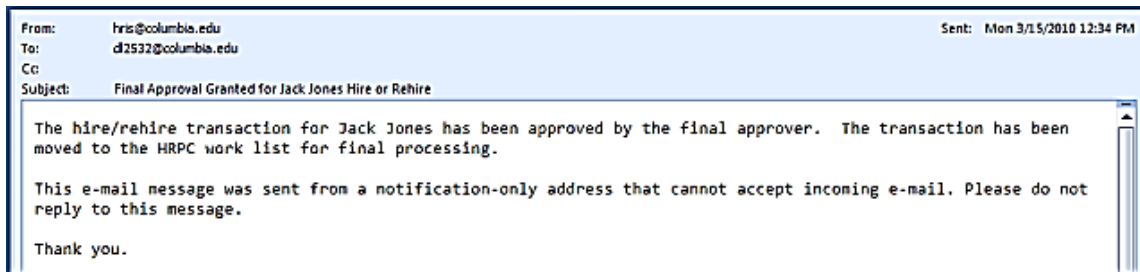
Sample e-mail notification for a transaction recycled to a 1st Level Approver



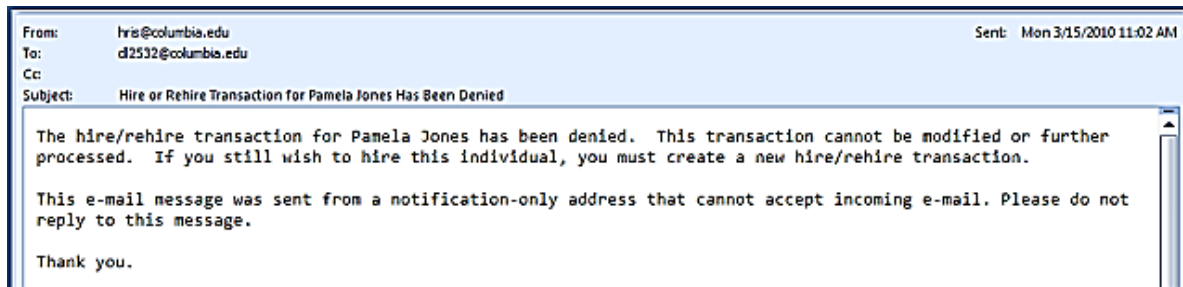
Sample e-mail notification for a transaction ready for 1st Level Approver review



Sample e-mail notification for a transaction that received final approval and was sent to the HRPC



Sample e-mail notification for a transaction that was denied by either an approver or by the HRPC. *Note: if this transaction was denied by HRPC the e-mail will be identical except that the end of the 1st sentence would say denied "by HRPC."*



Approver Worklist Status Page

In the Worklist folder, there is a page where you can see a snapshot of statuses for transactions in that Worklist. There are three sections on this page which show you the following:

- **Pending Transactions** displays transactions that are pending approval by an approver or pending processing by the HRPC
- **Cancelled Transactions** displays transactions that were denied by an approver or the HRPC
- **Processed Transactions** displays transactions that were processed by the HRPC

Notes:

- You cannot access transactions from the status page. It is a snapshot of submitted transactions
- This is an approver status page. Transactions that appear on this page will be based on the department access. Any approver who has access to a particular department (or set of departments) will see those template transactions in their Worklist Status Page
- In the Pending Transactions section, the Status field will display either a "Pending Approval" or "Requested" status for TBH transactions. "Pending Approval" means that the transaction is in workflow and pending approval by one of the approvers in that workflow. "Requested" means that the transaction received its final approval and is with the HRPC for final review and processing
- As an approver you can also see the location of transactions in the Workflow Status Page. See the Approver Lesson for more information on these pages

Access the Worklist Status Page

Access the Worklist Status page by clicking the Worklist link within the three dot menu icon.

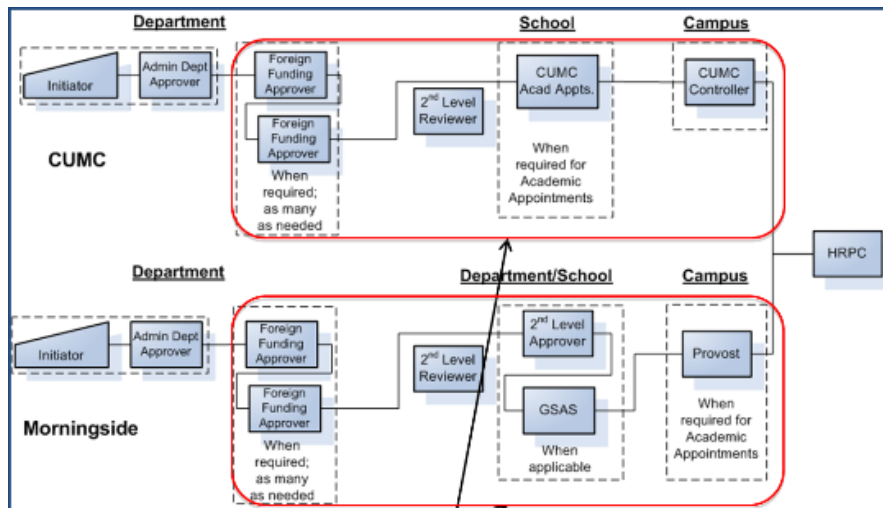
Subsequent Approver Reviews

The hire transaction was submitted into the workflow and approved by the 1st level approver in the home department. It is now ready for the next levels of review and validation. The next approval role to review the transaction depends upon the type of hire and if foreign departments are charged for the salary or additional compensation. Remember, each approval level is a touch point in the electronic workflow.

In the next steps of the process, the subsequent level approvers provide further review and confirmation of the transaction information entered by the initiator and the 1st level approver and check the transaction for completeness and errors.

Let's recap the approval roles at Columbia University

Approver Role	Workflow Location	Additional Information
1st level approver (administrative department)	The 1st level of approval in the workflow – in the employee’s administrative (home) department	The only role other than the Initiator that can update the template
Foreign funding approver(s)	1st level approvers not in the employee’s administrative department	Only review if providing funding for regular earnings or additional compensation payments
2nd level approver	School/department level at Morningside/LDEO. Campus level at CUMC.	This is the final approval level for administrative hires
Graduate School of Arts and Sciences (GSAS)	Reviews student officer appointments for the Arts & Sciences	Morningside Only
3rd level approver	Campus level	This is the final level of approval for academic hires



We are here in the workflow. The subsequent approvers:

- verify the hire is in line with the policies and procedures of the University
- review the data entered and approved to ensure it is complete and accurate
- check the transaction for completeness and errors
- recycle the form to the 1st level approver in the home department for updating ,if needed
- approve or deny the transaction

Subsequent Approver Review Steps

The steps to access and review a hire transaction are the same for all level approvers. Refer to the *Review a Hire Entry - The Approver Role* Lesson for detailed information. Below is a brief step by step of the review process.

1. Access the hire transaction from the worklist - pending transactions are located in your worklist and ready for your review. A separate e-mail notification is not sent to 2nd or 3rd level approvers. A good practice is to access your worklist periodically to assess your work and pending transactions
2. Review the hire transaction information - the steps to access documents and review a hire transaction are the same for all approvers. Refer to the *Review the Hire Information, Access Electronic Documents and Confirm Template Data* topics for detailed information. Remember that only 1st level approvers in the home department can make changes to a template. Subsequent approvers can add a comment and recycle the form for correcting
3. Review the documentation for completeness - confirm that all required documents are attached
4. Add a comment - this is optional for approvals but necessary for recycles to explain the reason for returning the form
5. Review the Financial Accounting Information on Page 2 of the Template - confirm the Salary Distribution and any Additional Compensation payments - if applicable
6. Submit the form through the workflow - see the next section for subsequent approver actions

Subsequent Level Approver Actions

At this point you reviewed and validated the information entered into the form and are ready to indicate the approver action. You have 5 options available: **Approve, Deny, Recycle, Save and Quit Without Saving.**



Approve the Transaction – submit to the next Level Approver or HRPC

Once you confirm that the information is correct, you are ready to approve the transaction and submit the form to the next Level Approver, or HRPC if this is the final approval, for review. To do this, click on the **Approve** button at the bottom of page 2 of the transaction, then click “OK”. The transaction will electronically move into the next level Approver(s), or HRPC, worklist and will be removed from your worklist. Recall that this distribution process and access is determined by the established workflow.

Deny the Transaction

If you determine that this hire transaction should not go through, you can deny the transaction, which will stop the transaction and make it inactive. To do this, click on the Deny button. The transaction will disappear from all worklists and cannot be retrieved.

Recycle the Transaction back to the 1st Level Approver

If you determine that there is information in the form that requires a change, you can send it back to the 1st Level Approver to make this correction. To do this, click on the Recycle button. The transaction will disappear from your worklist and will be routed to all 1st Level Approvers in the appropriate department. When a transaction is recycled, the appropriate 1st Level Approvers receive an e-mail notification that the transaction was recycled. This notification does not include the reason for the recycle. Be sure to enter a comment to explain what is needed.

The Save Button

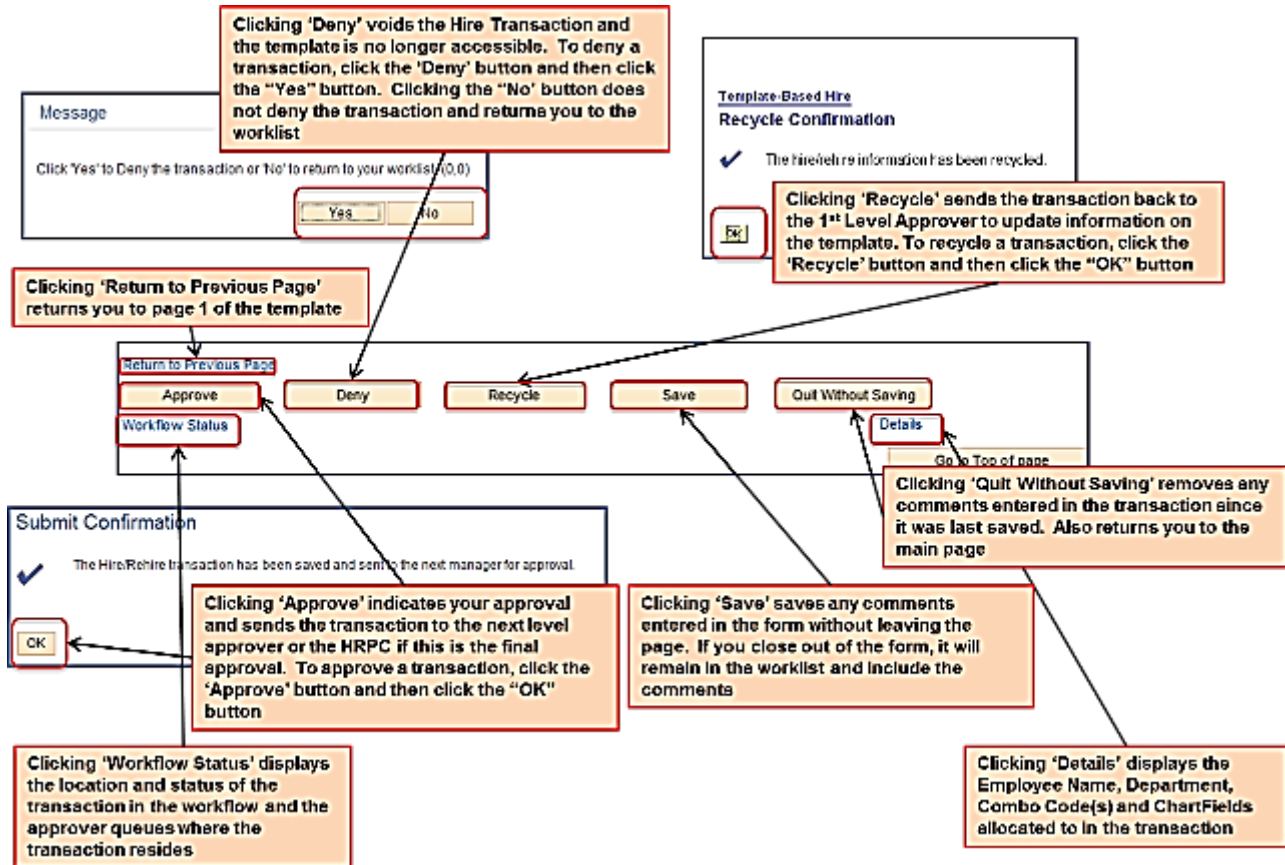
Clicking this button saves any comments you added to the form without leaving the page. If you close out of the form, it will remain in the worklists and include the comment.

The Quit Without Saving Button

Clicking this button removes any comments you added to the form *since it was last saved*. This action does not remove the transaction from the workflow; it simply brings you back to the form as it was when it was last saved.

Subsequent Level Approver Actions Diagram

The Approve, Deny, Recycle, Save, Quit Without Saving and Previous buttons are located at both the top and bottom of page 2 of the template. Below is a visual and a description of these options for approvers subsequent to the Level 1 Approver in the home department.



Subsequent Level Approver Notifications

As a subsequent approver to the 1st Level Approver, you will receive an e-mail notification when a transaction that you approved or initiated has the following action made to it.

- **Denied** - by any approver or HRPC after you created or approved a transaction in your workflow. For example, if you approve a transaction as a 2nd level approver, you will receive the denial notification e-mail if the transaction is denied by a 3rd level approver or HRPC

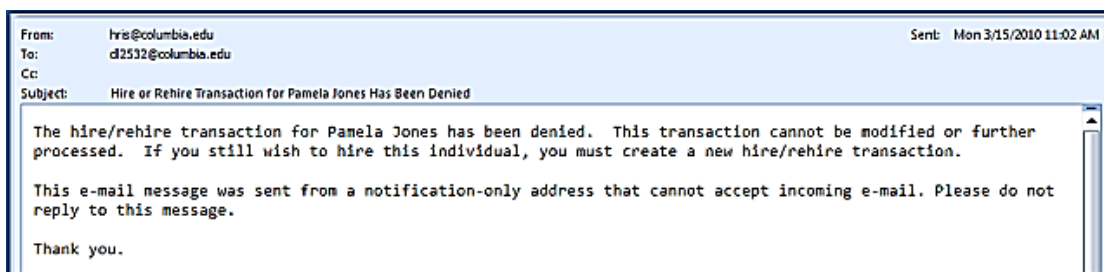
Where are the transactions now?

- **Denied** - the transaction is no longer accessible or retrievable

Note on recycled transactions - If you or a higher level approver recycle a transaction, you will not receive an e-mail stating that it was recycled. The transaction is in the 1st level approver worklist for access and updating and the 1st level approver will receive an e-mail notification.

Sample e-mail notification for a transaction that was denied by either a higher level approver or by the HRPC.

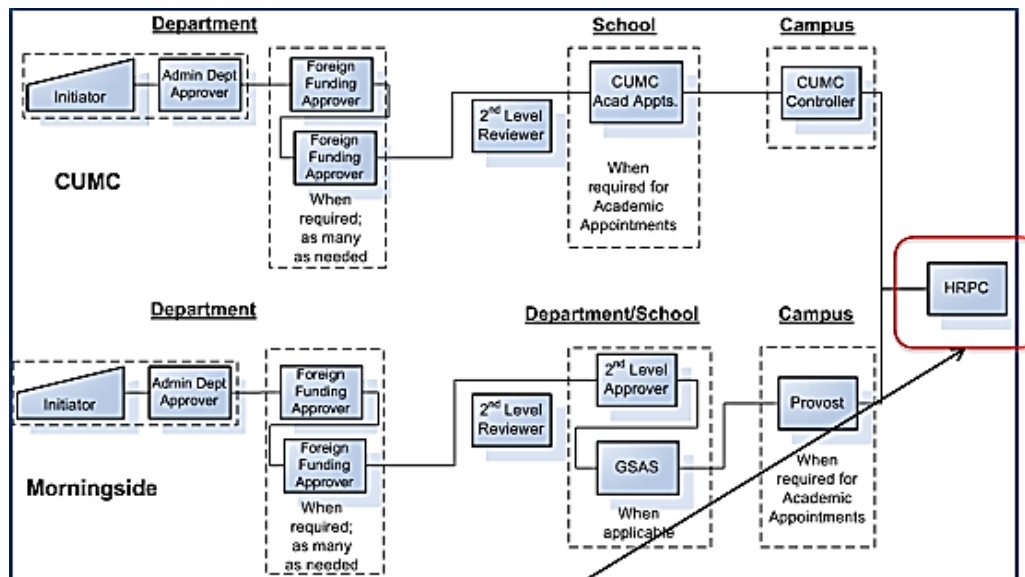
Note: if this transaction was denied by HRPC the e-mail will be identical except that the end of the 1st sentence would say denied "by HRPC." You would only receive this e-mail if you created or approved the transaction and it was then denied by a subsequent approver or HRPC.



HRPC Review

Now that the template has received all approvals, the transaction is in the HRPC worklist for the final review. If the transaction is complete, the employee is added to the PAC system. For additional information on HRPC actions, reference the *HRPC and the Manage Hire Process* topic.

Once an employee is added to the PAC system, you are able to access their information in MSS (Manager Self-Service). You will also see that the employee appears on the Processed Transaction section of the Worklist Status Page. Initiators will see this on the Hire/Rehire Status Page.



We are here in the workflow. The HRPC:

- Reviews the transaction data and performs the final hire entry
- Completes the transaction by: adding the personal and job record to PAC and creating the tax set-up for the employee
- Recycles the transaction. This action returns the transaction to the 1st level approver if updates are needed
- Deny the transaction. This action denies a transaction and makes it inactive. Note: it is rare that HRPC will deny a transaction and will consult with a level 3 approver

Confirm the Employee is in PAC - Initiators

The transaction was sent to the HRPC team who performs the steps to complete the hire process and add the employee's personal, job and tax data into the PAC system. As an Initiator you will know that an employee is added to the PAC system once their name appears on the Processed section of the Template-Based Hire/Rehire Status Page. Once an employee is added to PAC, an Employee ID is assigned and is viewable in the Person ID column. See the "Initiator Status Page" lesson for a visual of the page.

Confirm the Employee is in PAC - Approvers

The transaction was sent to the HRPC team who performs the steps to complete the hire process and add the employee's personal, job and tax data into the PAC system. As an Approver you will know that an employee is added to the PAC system once their name appears on the Processed Transactions section of the Worklist Status Page. Once an employee is added to PAC, an Employee ID is assigned and is viewable in the Person ID column of the Processed Transaction section of the page. See the "Approver Worklist Status Page" lesson for a visual of the page.

Employee Information in Manager Self-Service

Once employees are added to PAC you can view their personal and job information in MSS if you have Manager Self-Service access. There are several features from which you can locate employee data. To access MSS, first log in to PAC and from the main menu navigate to Manager Self-Service.

View Employee Personal Information

One way to view employee data in Manager Self-Service is through the *View Employee Personal Info* link. To access this, first open the Job and Personal Information folder within the Manager Self-Service folder, then click on the *View Employee Personal Info* link to retrieve the information.

The Employee Information page displays addresses, phone numbers, emergency contacts, job summary and other information.

Here is how to access the Employee Personal Information Page in MSS:

1. Open the **Job and Personal Information** link within the Manager Self Service folder from the menu
2. Click the **View Employee Personal Info** link (the employee list as of today's date appears)
3. Change the **date** (if needed). The date defaults to today's date and you can change it to an earlier date if you want to see data from a prior time period for viewing non-active faculty and staff.** If the date was changed, click the **Refresh Employees** button; the Employee List will refresh, displaying the active employees as of that date
4. Click the **Select** button next to the employee's name (the employee information appears)

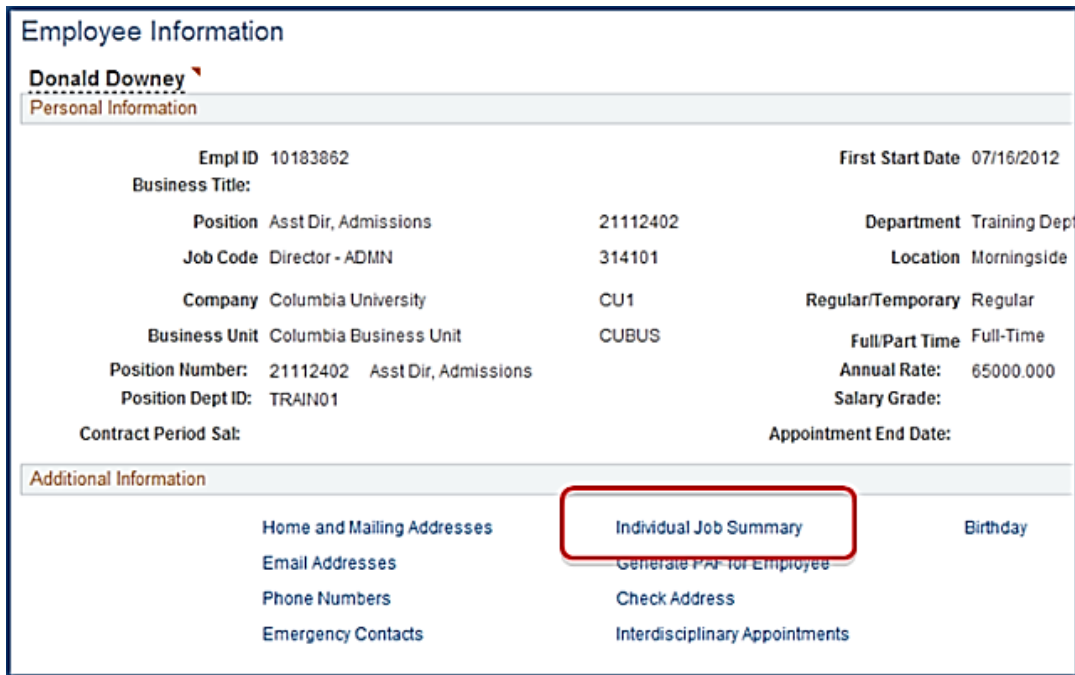
View the Individual Job Summary

Another point of access to view employee data in MSS is through the Individual Job Summary page. This page is a link within the Employee Personal Information but can also be accessed directly. To do this, first click on the Job and Personal Information Page within the Manager Self-Service menu, then click on the Individual Job Summary link to retrieve the information.

The Individual Job Summary page displays a summary overview of history on a specific position. On this page you will see changes to position data, action reasons, effective and status dates, department and job codes and budgeting information.

Here is how to access the Individual Job Summary Page within the Employee Record:

1. Click the **Individual Job Summary** link from the bottom of the Employee Information page



Employee Information

Donald Downey ▾
Personal Information

Empl ID 10183862	First Start Date 07/16/2012
Business Title:	
Position Asst Dir, Admissions 21112402	Department Training Dept
Job Code Director - ADMN 314101	Location Morningside
Company Columbia University CU1	Regular/Temporary Regular
Business Unit Columbia Business Unit CUBUS	Full/Part Time Full-Time
Position Number: 21112402 Asst Dir, Admissions	Annual Rate: 65000.000
Position Dept ID: TRAIN01	Salary Grade:
Contract Period Sal:	Appointment End Date:

Additional Information

Home and Mailing Addresses	Individual Job Summary	Birthday
Email Addresses	Generate PAR for Employee	
Phone Numbers	Check Address	
Emergency Contacts	Interdisciplinary Appointments	

Here is how to access the Individual Job Summary Page from the Menu:

1. Open the **Job and Personal Information** folder within the Manager Self Service folder from the menu
2. Click the **Individual Job Summary** link
3. Enter Employee data values into any of the available **search fields**
4. Click the **Search** button

View Employee in a Personnel Action Report

Another point of access to view transaction effective dates for employees in MSS is through the Personnel Action Report. This report lists employees in your department who had a transaction action date in the current month.

Note: In the first week of every month, only the preceding month's data is available. To do this, first navigate to the Manager Self-Service Reports link within the Manager Self-Service menu, then click on the Generate a Personnel Action Report link to generate the report.

The Personnel Action Report displays the Employee's Name, ID, Status, Department, Position, Annual Rate, Action Reason Codes, Action and Effective Dates.

Here is how to access the Personnel Action Report within MSS:

1. Open the **Manager Reports** folder within the MSS folder
2. Click the **Manager SS Reports** link
3. Click the **Generate a Personnel Action Report** link

Check Your Understanding: Review a Hire Entry - The Approver Role

Let's review the topics covered. Fill in the Blanks/True or False/Yes or No/Short Answer/Post Lesson Activity:

1. Approvers access transactions to review via the _____.
2. How does an approver review a Template-Based Hire Transaction? List the steps
_____.
3. How do you access the attached documents?
_____.
4. If an approver has already approved a transaction, why does it require another level of review?
_____.
5. Does a hire transaction always go to foreign funding approvers? YES or NO and WHY
6. Can you access transactions from the Worklist Status page? YES or NO
7. What are the four types of 1st level approver notifications received from the system and where are the transactions? _____.
8. Subsequent approvers receive the same system e-mail notifications as a 1st level approver? TRUE or FALSE
9. List the approver actions that can be made on the transaction once you have reviewed and validated the template data.
10. Once _____ adds an employee to the PAC system, you will be able to access their information in _____. You will also see that the employee appears on the _____ section of the _____ Page

Post Course Activity:

Discuss the following with your team/supervisor/manager:

1. What are some examples of recycling a hire transaction?
2. Where do I locate the financial/accounting information for an employee?
3. How do I find the combo codes used by our department to charge an employee's earnings?
4. If possible, review examples of prior hires

Answer Key: Review a Hire Entry - The Approver Role

Below are the answers to the *Check Your Understanding: Review a Hire Entry - The Approver Role* questions:

1. Approvers access transactions to review via the **Worklist**. 1st Level Approvers receive e-mail notifications that there is a transaction ready for review. Subsequent level approvers do not receive this e-mail. E-mail notification is not sent to 2nd or 3rd level approvers. A good practice is to access your worklist periodically to assess your work and pending transactions.
2. How does an approver review a Template-Based Hire Transaction? List the steps: **1 - Access the electronic documents, 2 - Confirm all documents are attached, 3 - Review the transaction information** - Compare the template data to the source data, 4 - Add a comment - this is optional for approvals but necessary for recycles to explain the reason for returning the form, **5 - Review the Financial Accounting Information** on Page 2 of the Template - confirm the Salary Distribution and any Additional Compensation payments - if applicable, **6 - Indicate your approval action and submit the form through the workflow** - Remember that only 1st level approvers in the home department can make changes to a template. Subsequent approvers can add a comment and recycle the form for correcting.
3. How do you access the attached documents? **Scroll down to the end of transaction to the Attachments section and click on the "View" button for each attachment.** The documents will appear in a separate browser window. You can toggle between the two windows, adjust the size of each browser window to see both the template and the documents on one screen or if you have two monitors, you can display the documents on one monitor while the transaction information is visible on the other monitor.
4. If an approver has already approved a transaction, why does it require another level of review? **All hire transactions must have at least two different individuals approve the transaction.**
5. Does a hire transaction always go to foreign funding approvers? YES or **NO** and WHY. TBH Transactions only route to foreign funding approvers if earnings are charged outside of the admin (home) department.
6. Can you access transactions from the Worklist Status page? YES or **NO**. You cannot access transactions from the status page. It is a snapshot of submitted transactions.

7. What are four types of 1st level approver notifications received from the system and where are the transactions. **As a 1st level approver you will receive an e-mail notification when** the following actions occur on transactions within your workflow: **1 - Recycled** to you (by a 1st level foreign funding approver, 2nd or 3rd level approver in your workflow or HRPC and sent back to you for updating) - the transaction is in your worklist for access and updating **2 - Submitted** (by any Initiator in your workflow) - the transaction is in your worklist **3 - Final Approval** was received by the final approver and the transaction was sent to HRPC - the transaction is in the HRPC worklist **4 - Denied** (by any approver in your workflow or HRPC) - the transaction is no longer accessible or retrievable.

8. Subsequent approvers receive the same system e-mail notifications as a 1st level approver? TRUE or **FALSE**. As a subsequent approver to the 1st Level Approver, you will receive an e-mail notification when a transaction has been **Denied** by any approver or HRPC after you created or approved a transaction in your workflow.

9. List the approver actions that can be made on the transaction once you have reviewed and validated the template data. **You have 5 options available:** **1 - Approve.** The transaction will electronically move into the next level Approver(s) worklist and will be removed from your worklist. Recall that this distribution process and access is determined by the established workflow **2 - Deny.** The transaction is inactivated and it will disappear from all worklists and cannot be re-accessed **3 - Recycle.** The information in the form requires a change and you send it back in the workflow for correction. A 1st level approver recycles to the Initiator and subsequent level approvers recycle to the 1st level approver in the home department. Be sure to enter a comment to explain what is needed **4 - Save.** Saves any changes a 1st Level Approver in the home department made to the form without leaving the page. Subsequent level approvers can only add a comment **5 - Quit Without Saving.** This removes any data changes you made to the form *since it was last saved*. Any information you entered, *from the last time it was saved*, will not be saved in the system and any documents you attached will be removed. This action does not remove the transaction from the workflow; it simply brings you back to the form as it was when it was last saved. Subsequent level approvers can only add a comment.

10. Once **HRPC** adds an employee to the PAC system, you will be able to access their information in **MSS**. You will also see that the employee appears on the **Processed Transactions** section of the **Worklist Status** page.

Remember that as an approver you are verifying that the hire is in line with the policies and procedures of the University and ensuring the transaction is complete and accurate.

The Rehire Template

This is *The Rehire Template* lesson of the *Template-Based Hires Page 1* course. Upon completion of this lesson, you will be able to:

- Enter a rehire into Template-Based Hire
- Recognize defaulted data
- Determine which data fields require update or entry

Estimated Time to Complete Lesson: 10 minutes

Note: Refer to the "Enter a New Hire - The Initiator Role" and "Review a Hire Entry - The Approver Role" lessons for most of the practice entry exercises as the field entry is similar.

What is a Rehire

Use the rehire template to rehire someone who was previously employed by the University and who is returning to work at the University. However,

For Morningside, Lamont Doherty Earth Observatory, Nevis and Manhattanville campuses:

- The rehire template should not be used for academic personnel (i.e., faculty, officers of research, officers of the libraries and student officers) who have been terminated within the two past years.
- Faculty and officers of research who have retired from the University cannot be rehired as special lecturers or special research scholars/scientists using the rehire template. A paper nomination form using the codes REH/MJB must be used to rehire them.

For CUIMC:

- the rehire template is not used for academic personnel who are reappointed on rosters

When adding a rehire into the system, some of the rehire's personal and job information which still exists in PAC will be loaded into the template. This information is pulled into the template by simply entering the person's Employee ID (EMPLID) that was established when they previously worked at the University. When processing a rehire transaction, you should confirm the uploaded data, updating any new information and also entering data where there are blank fields (as needed).

Refer to the "Getting Started" lesson for information on how to obtain an employee ID.

The Initiator Role

The preparation, required information, data entry and document attachment process you follow to enter a rehire into the template is the same process used as when you are entering a new hire. It is important to select the rehire template at the initial selection because once data is saved into a template, it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template.

The rehire template has an additional data field where the Employee ID is entered. This entry is what pulls the existing information into the template.

Question: Do you recall how to determine if the person you are hiring is a rehire? Once you determine that the person is a rehire, note the prior Employee ID.

Refer to the *Enter a New Hire in TBH - The Initiator Role* lesson for detailed information on access and field entry. The following pages will provide the steps followed and highlight any differences regarding a rehire entry.

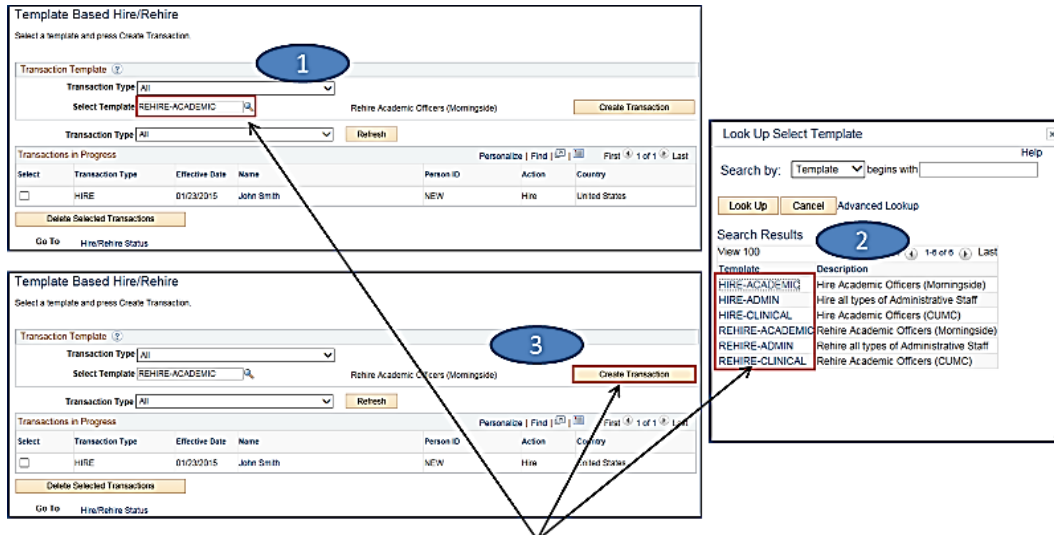
Access the Rehire Template

Now that you gathered the employee's information, you are ready to select a template and begin entry.

First, select a rehire template and create the transaction. Or, if the draft template was created by the TBH TalentLink integration process, select the draft template from the Hire/Rehire Employee page.

Notes:

- Remember, it is important to select the correct template at the initial selection because once data is saved into a template it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template
- The CUMC Academic Hire and Rehire templates are used to hire or rehire ALL academic personnel at the Columbia University Medical Center, except those who are reappointed by the roster process. These templates are used for both clinical and non-clinical positions. For clinical positions, complete the clinical data fields on the form. For academic appointments with no clinical role, the clinical data fields are left blank
- The Morningside Academic Hire and Rehire templates are used to hire or rehire all academic personnel on the Morningside, Lamont Doherty Earth Observatory (LDEO), Nevis and Manhattanville campuses, except those who are reappointed by roster, and who have been terminated for less than two years
- The Administrative Hire and Rehire templates are used to hire or rehire all administrative positions regardless of campus



The screenshot shows the 'Template Based Hire/Rehire' interface. In the top section, the 'Transaction Template' dropdown is set to 'All'. The 'Select Template' field contains 'REHIRE-ACADEMIC'. A red box highlights this field, and a blue circle with the number '1' is placed over the search icon. Below this, the 'Transactions in Progress' table shows a single entry for 'HIRE' with effective date '01/23/2015' and name 'John Smith'. A 'Look Up Select Template' dialog box is open on the right, showing search results for 'REHIRE-ACADEMIC'. A red box highlights the search results, and a blue circle with the number '2' is placed over the search results. A third blue circle with the number '3' is placed over the 'Create Transaction' button in the main interface.

To Access and Select a Rehire Template:

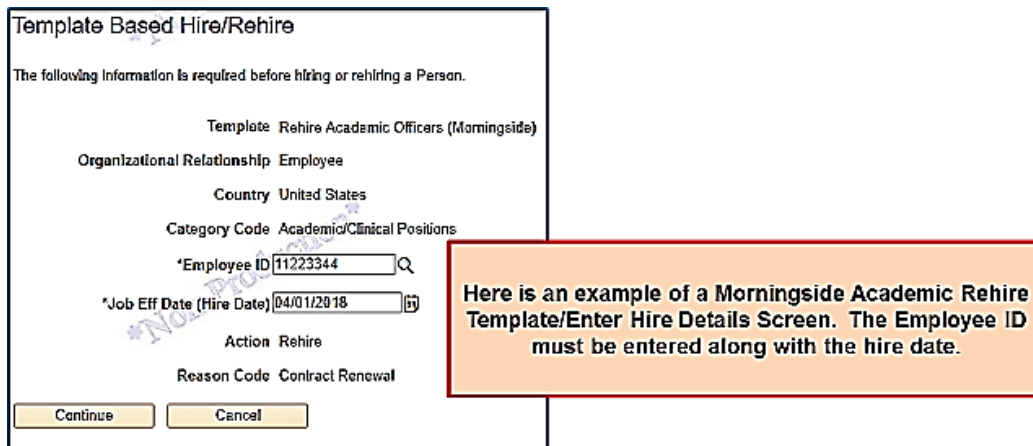
1. From within the Transaction Template section, click on the look up button next to the Select Template field
2. Select the needed template from the search results list
3. Click "Create Transaction"

Enter the Employee ID and Job Effective Date

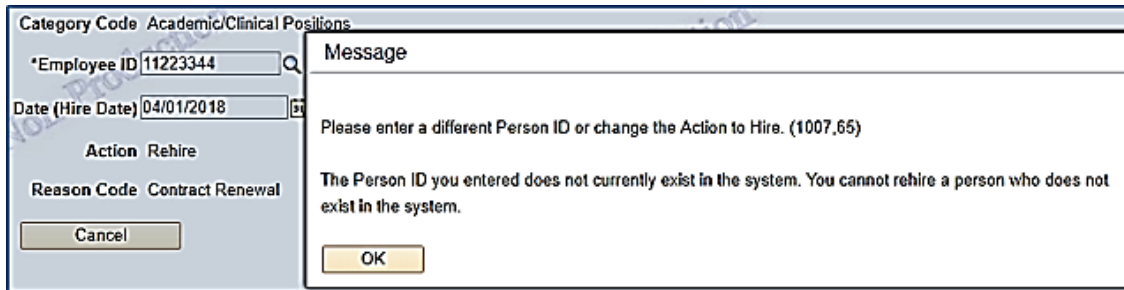
When using the Rehire Template, the Employee ID (EMPLID) and Job Effective Date must be entered.

The **Employee ID (EmplID)** entry pulls the personal and job information that exists in PAC for the person and places it into the data fields on the template. For a review of how to determine if the employee is a rehire and to obtain the Employee ID, go to the *Prepare to Enter a TBH Transaction* topic in the *Getting Started Using TBH* lesson.

Note that on the Academic Rehire template only, the Action and Reason Codes default to *Rehire/Contract Renewal*.



If you enter an Employee ID for a person who does not exist in the system, an error message appears to change the action to a hire. First, check the number to ensure it was entered correctly.



Recall from the *Enter a New Hire in TBH - The Initiator Role* lesson, that the hire date (**Job Effective Date**) is required on the first screen once a template is selected. This date defaults to today's date and must be changed to the employee's date of rehire/start of the appointment (if it isn't today's date). For a review of the definitions of the defaulted field data on this screen, go to the *Enter the Hire Details* topic in the *Enter a New Hire in TBH - The Initiator Role* lesson.

Validate the Social Security Number and Employee ID for a Rehire

You are now at the Enter Employee Information screen. Before confirming and entering data into the template, the system will perform a check to determine that the SSN and Employee ID match.

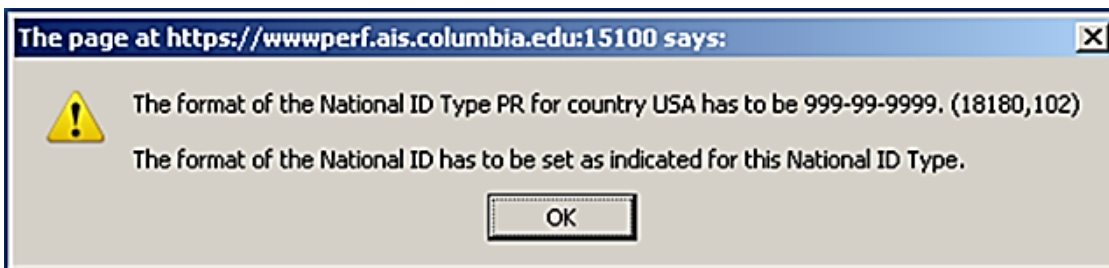
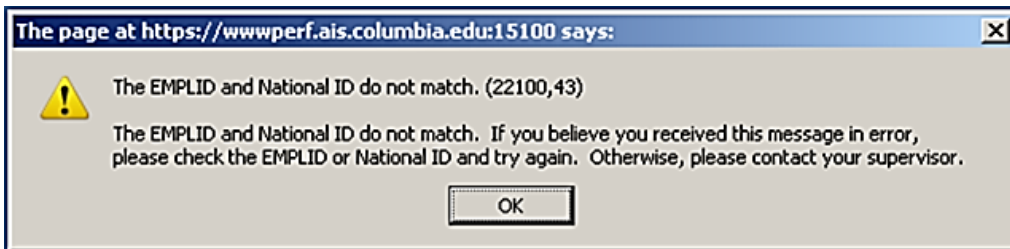
If the person was previously hired under a 'dummy' Social Security Number, the Rehire Template cannot be used. Please print a PAF, update the Social Security Number and update the rest of the information.

Let's take a closer look at the search performed in the system on the SSN and EMPLID.

When you enter a SSN and EMPLID into the rehire template and click 'Next', the system will perform a search to match the EMPLID against the database. The following results are returned.

1. If the EMPLID and SSN match, proceed with the transaction
2. If the EMPLID and SSN do not match, you will receive an error message asking you to check the SSN and EMPLID and try again
3. If the EMPLID entered is not a valid 8 digit number or if the SSN entered is not a valid 9 digit number, you will receive an error message saying the number is not valid and to please check it and try again
4. If the EMPLID only exists in the PSYCHE database (a retired legacy system that contains data for employees terminated prior to 2002 and whose information is not in PAC), an error message will appear saying that this EMPLID only exists on PSYCHE and that HRPC needs to process the hire. To complete the hire transaction, please submit it via a PAF

Error Message Examples



Confirm Update and Enter Employee Information

Now that the system validated the SSN against the Employee ID, you are ready to complete the template fields. As with the Hire template, fields noted with an '*' are required information and must be entered. By entering the Employee ID into the template, the person's prior PAC data was pulled into the fields. Processing a rehire requires confirming the data that pre-populated as well as updating or entering any new information.

Using the supporting documents for source information, perform the following on page 1 of the template:

1. **Confirm the information that defaulted into the data fields** on the form is correct. If it is incorrect, the field is open allowing for changes. For example, an employee's home address appears. Confirm that this address is correct. If it is, no edits are necessary. If it is not, simply enter the correct address in the field
2. **Enter information that is new or changed** on the form. Not all data defaults into the fields. Where the fields are blank or needs to be revised, enter the data

For rehires, you are confirming that the information in the system is still correct and if not, updating it with current information obtained from the source documents.

All data that is pulled into the template can be changed **except** for the EMPLID, Previous Position Data, Previous Education Data, Previous Salary Information.

The Education Section

Depending on the template, there are a set number of degree sections to enter into and also that display from the Hire template. If the person has earned an additional degree or degrees since last working at Columbia, be sure to enter them into the Education section. If the new degree results in a new Highest Education Level, be sure to also update that field.

For Academic Rehire Templates

Five degrees can be displayed from existing education data in the system. These degrees are uneditable. If this information is incorrect, do not use the template. Submit a PAF with the new appointment, correcting information on the PAF. Previous degrees should be added/corrected in the "Comments" section. There is space to add three new/additional degrees.

For Clinical Rehire Templates

Four degrees can be displayed from existing education data in the system. These degrees are uneditable. There is space to add two new/additional degrees.

For Administrative Rehire Templates

Four degrees can be displayed from existing education data in the system. These degrees are uneditable. There is space to add four new/additional degrees.

Refer to the *Enter Employee Information* topics for a description on the hire details fields.

Additional Rehire Template Sections and Information

Previous Position Data

In the Previous Position Data section, the *position data* for the person's last primary job defaults into the fields and cannot be changed.

Previous Salary Information

In the Previous Salary Information section, *Period Salary, Full Base Salary, Appointment Start and End Dates and Action/Reason* for the termination for the person's last primary job defaults into the fields and cannot be changed.

Previous Compensation

In the Previous Compensation section, *Salary Type and Compensation Rate* for the person's last primary job defaults into the fields and cannot be changed.

Attach Documents Add a Comment and Review Template

Attach Documents

Attaching documents electronically eliminates the need to send paper documents between offices. You can attach as many documents as needed to a template-based rehire form. Remember, only an Initiator or 1st level approver in the home department can attach documents to a template.

Refer to the *Attach Documents* topic and the *Attaching Documents* Job Aid for information on how to prepare, scan and attach documents.

Add a Comment

If you would like to add a comment to the transaction that will be visible to the approvers, you can do so by entering text in the **Comments** field at the end of the form. Your approver will see this when the form is opened and viewed. Note - the comment does not display in the approver worklist page.

Review Information

An important step in the template entry process is to review and confirm the information entered before moving to page 2 and submitting the transaction to an approver. To review pre-populated and entered data, scroll through page 1 of the template and confirm the information in the data fields and that all required documents are attached.

Complete the Financial Accounting Information

Now that you reviewed and confirmed that the information on page 1 is correct, you are ready to move to page 2 of the template.

- Click the "**Labor Accounting**" tab. Edits will run to check that all required fields were completed. Review any error messages that appear and make any corrections, as needed
- Enter the Salary Distribution - required for template submission
- Enter any Additional Compensation payments known at the time of hire - not required for template submission
- If an additional compensation is added please note in Comments section, "Add Comp included"

Training on how to complete page 2 of the Hire/Rehire templates is located in the Course Catalog of the HR Website.

Submit the Template to an Approver

Now that you completed page 2 of the template, you are ready to submit the form to an approver. To do this, click on the "**Save and Submit**" button, then click "**OK**" and the transaction will electronically move into the Approvers worklist and will be removed from the "Draft Hires to Process" section of your main page.

Refer to the *Enter Employee Information* lesson for detailed information on submitting transactions and additional transaction options.

Review a Rehire Template - The Approver Role

The next steps to processing a rehire is for each approver to review the information that was submitted by the Initiator and check for completeness and errors. Upon review of the template, it can be approved and submitted through the workflow up to receipt by the HRPC Team for review and entry into the PAC system. Or, if needed, it can be denied or recycled back into workflow for correction.

The review process and action steps approvers perform for a rehire transaction are the same as performed for a new hire transaction. Refer to the *Review a Hire Entry - The Approver Role* for detailed information on how to complete approver reviews.

Check Your Understanding: The Rehire Template

Let's review the topics covered. Fill in the Blanks/True or False/Yes or No/Short Answer/Post Lesson Activity:

1. What is the definition of a Rehire? _____.
2. The Rehire Template is used for all Academic personnel. TRUE or FALSE
3. What must be entered into the Rehire Template to pull the personal and job information that exists in PAC for the person and place it into the data fields on the template? _____
4. What two fields, once entered, initiates a system search to confirm that they match for the employee in the database? _____ and _____.
5. Do all data fields pre-populate with defaulted information in the Rehire Template? YES or NO
6. The Financial Accounting information on page 2 of the template does not need to be completed for rehires. TRUE or FALSE
7. The review process and action steps approvers perform for a rehire transaction are the same as performed for a new hire transaction. TRUE or FALSE

Post Course Activity:

Discuss the following with your team/supervisor/manager:

1. Approximately how many employees do we process in our department who are rehires?
2. If possible, review examples of prior rehires

Answer Key: The Rehire Template - Below are the answers to the *Check Your Understanding: The Rehire Template* questions:

1. What is the definition of a Rehire? A rehire is someone who was previously employed by the University and is returning to work at the University. As the person was previously employed here, he or she is considered a rehire versus a new hire.
2. The Rehire Template is used for all Academic personnel. TRUE or **FALSE**. For the Morningside template - The rehire template is not used for academic personnel who are reappointed on rosters or who were terminated within the past two years. For the CUMC Clinical template - The rehire template is not used for academic personnel who are reappointed via the roster process.
3. What must be entered into the Rehire Template to pull the personal and job information that exists in PAC for the person and place it into the data fields on the template? The **Employee ID (EmplID)** of the rehire.
4. What two fields, once entered, initiates a system search to confirm that they match for the employee in the database? **Social Security Number** and **Employee ID (EmplID)**.
5. Do all data fields pre-populate with defaulted information in the Rehire Template? YES or **NO**. All fields are not automatically pre-populated with prior information. Processing a rehire requires confirming the data that pre-populated as well as updating or entering any new information.
6. The Financial Accounting information on page 2 of the template does not need to be completed for rehires. TRUE or **FALSE**. A Salary Distribution is required for all employees. Once you review and confirm that the information on page 1 is correct, you are ready to move to page 2 of the template where the salary distribution is entered (required for template submission) along with any additional compensation payments known at the time of hire (not required for template submission).
7. The review process and action steps approvers perform for a rehire transaction are the same as performed for a new hire transaction. **TRUE** or FALSE

Course References

You can access the Lesson, Job Aids, Policies, and Procedures that were referenced throughout this course on the HR Website.