### 8.9 HRMS Step by Step Guide Hire Classified Staff - Workforce Administration Module

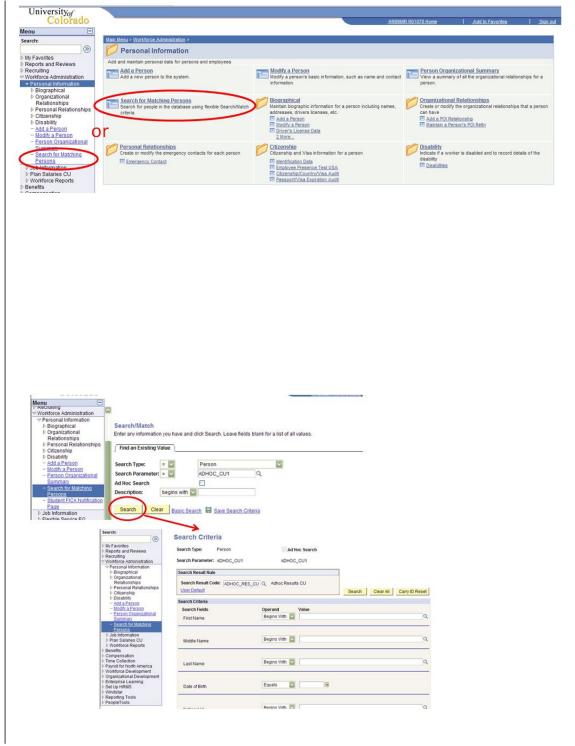
**Overview:** This guide provides instruction for hiring a new classified staff member.

Note: The screen shots used in this guide may not be representative of your access.

- 1. Navigate to Search for Matching Persons
- Workforce Administration
- Personal Information
- To begin, verify that the Person does not already exist in HRMS
- Click on Add a Person, and then <u>Search for Matching</u> <u>Persons</u> (or click on <u>Search for Matching</u> <u>Persons</u> in the menu/ navigation bar)

### 2. Search Criteria page displays

- Keep your search as broad as possible (ex: search by Last Name only and pick from the resulting list)
- Name fields must be an exact name match, and are case sensitive. Correct ex: Sharon (not Shari), Johnson (not johnson)
- Note: If using SSN, enter numbers only without dashes. Using the National ID



(SSN) may not provide any data for existing POIs who are not a Security Access POI

- Click Search
- 3. When person does not already exist in HRMS, begin the Add a Person process

### **Navigation:**

- Workforce Administration
- Personal Information
- Add a Person

*Note:* When person already exists in HRMS, refer to either the *Add Employment Instance, or Transfer/Rehire* stepby-step guide. (Navigation is: Workforce Administration / Job Information / Add Employment Instance or Transfer/Rehire)

### 4. Add Person page displays

Click
 <u>Add the Person</u>

### Search Criteria

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dd Person			
Person ID:	NEW	Search for Matching Persons	
	Add the Person		

New Window | Customize Page |

# 5. Biographical Details page displays

- Effective date defaults to current date; date you are entering data. Leave as is or change to hire date or other appropriate date. This date cannot be future-dated. (Generally, this date is the date of hire; however, the official date of hire will be recorded in Job Data.)
- Click Add Name

# 6. Edit Name page displays

### Enter name information as it appears on SS card

 Click OK to return to Biographical Details page

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Biographical Details | Contact Information | Regional | Dept Information/Verifications | Organizational Relationships

Edit Name

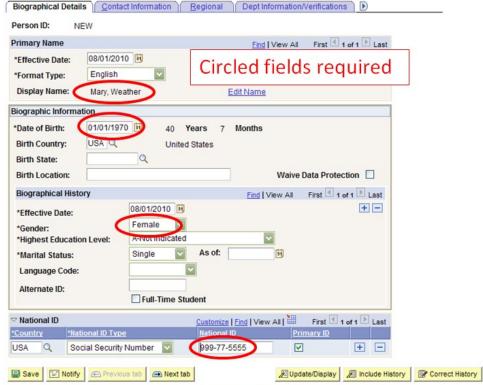
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OK Cancel			

# 7. Biographical Details page re-displays

- Enter Date of Birth
- Enter Gender
- Enter SSN/National ID – numbers only, without dashes
- Other info on this page is optional; enter if known

Contact Information

Click



Biographical Details | Contact Information | Regional | Dept Information/Verifications | Organizational Relationships

- 8. Contact Information page displays
- Click Add Address Detail. The Home address is the employee's permanent address.
   Ex: Colorado, France, India, etc.

# 9. Address History page displays

- Change Country, if applicable
- Click

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### Address Type: Home



# 10. Edit Address page displays Edit Address • Enter address Address 1: 72 North Pine • Address 2: Address 2:

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County:				

11. Contact Information page re-displays

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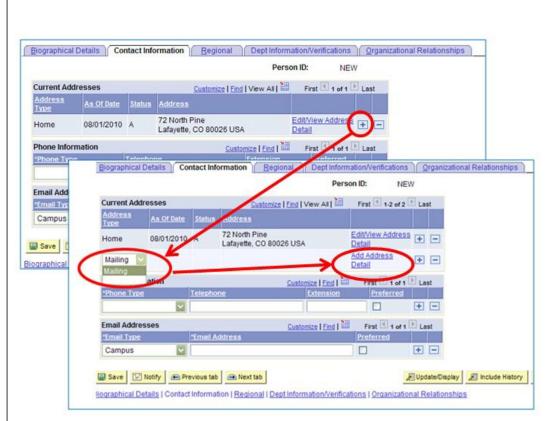
- If Mailing address is different than Home address, click + by
   EditView Address Detail
   to
   add a record.
- Select "Mailing" from the dropdown menu and then

Add Address Detail

- Select the appropriate Phone Type and enter telephone #
- Click on to add additional phone numbers; Indicate the Preferred telephone contact by selecting the appropriate checkbox
- Select the appropriate Email Type and enter the email address

Click on to add additional email addresses; Indicate the Preferred email contact by selecting the appropriate checkbox

Click



#### Biographical Details Contact Information Regional Dept Information/Verifications Organizational Relationships Person ID NEW First 1 of 1 🕨 Last Current Addresses Customize | Find | View All | Address Type As Of Date Status Address Edit/View Address + -72 North Pine Home 08/01/2010 A Lafayette, CO 80026 USA Detail Phone Information Customize | Find | 🛗 First 🗹 1 of 1 🕑 Last Campus 1 303/333-9999 **~** + -Email Addresses Customize | Find | First 1 of 1 🕨 Last \*Email Type \*Email Address Campus mary.weather@cusys.edu **~** + -🗐 Save 🔄 Notify 🚗 Previous tab 🔿 Next tab Dpdate/Display Dinclude History

Biographical Details | Contact Information | Regional | Dept Information/Verifications | Organizational Relationships

# 12. Regional page displays

- Ethnic Group is required. Primary box will be checked automatically for first choice.
- If applicable, enter additional ethnic groups by inserting a row

- Click Military Status dropdown menu and choose status if known, or "Not Indicated" if unknown. This field must be populated in order to anchor the effective date on this page.
- Click

Dept Information/Verifications

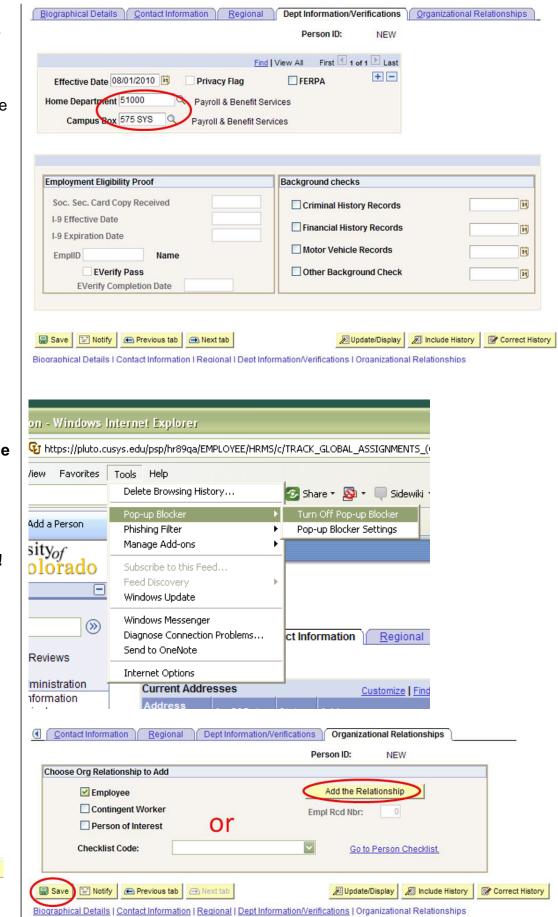
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Biographical Details | Contact Information | Regional | Dept Information/Verifications | Organizational Relationships

### 13. Dept Information/ Verifications page displays

 Home Department and Campus Box are required.

- Click
  - Organizational Relationships
- 14. Organizational Relationships page displays
  - Note: Before saving record, be sure Pop-up blockers are off!!! See below.
  - Go to Internet 'Tools'
  - Select 'Pop-up Blocker'
  - Select 'Turn Off Pop-up Blocker
  - Check Employee box
  - Click Save or Add the Relationship



# 15. Work Location page displays

- Enter date of hire
- *Hire* Action defaults

### Enter Reason: Notes for classified staff hires:

- UCB: enter hire reason (do not select PRB [probation]) – see additional instructions on bottom of page 10
- UCD, UCCS, SYS: may select PRB (probation)
- Enter position number\*
- Job Notes may be added by clicking icon

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Note: \* If the hire date is prior to the effective date of the position **or** if the position has not been approved, you will not be able to save the hire. A position in Proposed status will have to be approved before proceeding. Once the position has been approved, navigate to Add Employment Instance to complete the hire. (Workforce Administration / Job Information / Add Employment Instance). Refer to the Add Employment Instance step-by-step guide for more information.

# 16. Notepad page displays

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- Add a New Note
- Enter note/comments
- Click on <u>Job Data</u> <u>Page</u> link to return to page
- Click on Job Information

Job Data	Notenad			
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### 17. Job Information page displays

- Reports To defaults from position data
- Employee Class will default from Job Code upon saving
- Percent of Time and Standard Hours default from position data and can be updated. A change to either one updates the other
- Click
   Payroll

# 18. Payroll page displays

- All fields default
- Tax Location Code & FICA Status default from job code and location code.
   Update if needed, but system will set the final FICA Status
- Click Compensation

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# 19. Compensation page displays

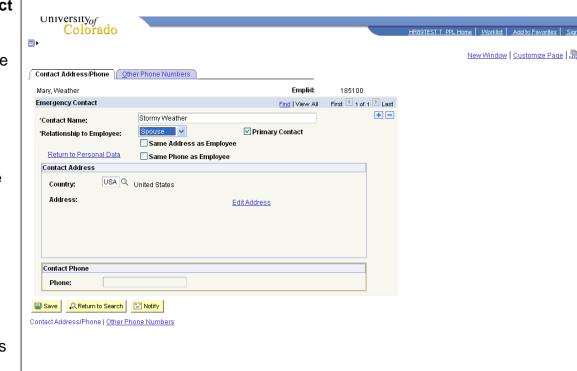
 Frequency: Verify that M (monthly) has defaulted University<sub>of</sub> Colorado

- In Pay Components section:
   a) Enter monthly
  - Rate Code of BASEM b) Enter monthly Comp Rate
- Click
   Calculate Compensation
- Click
   Employment Information
- 20. Employment Information page displays
  - Enter Appointment End Date, if applicable. (Generally not used for classified)
  - Review data
  - Click Save or OK \*
  - For new hires, system automatically transfers to Emergency Contact page

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Note: \* If the hire date is prior to the effective date of the position **or** if the position has not been approved, you will not be able to save the hire. A position in Proposed status will have to be approved before proceeding. Once the position has been approved, navigate to Add Employment Instance to complete the hire. (Workforce Administration / Job Information / Add Employment Instance). Refer to the Add Employment Instance step-by-step guide for more information.

- 21. Emergency Contact page displays
  - Enter Contact Name & Relationship to Employee
  - Identify Primary Contact by clicking
  - If contact has same address and phone number as employee, check those boxes
  - If contact has other address, click
     Edit Address
  - Notice that multiple emergency contacts can be designated by inserting rows
  - Additional phone numbers can be entered on Other Phone Numbers page
  - Review data
  - Click Save



**Note for UCB classified hires:** When a new *classified* employee is hired, a specific hire Reason (other than PRB - Probation) is entered on the Hire row. A second job row is required to place the new employee on Probation. <u>After saving the emergency contact information</u>, return to the new employee's Job Data / Work Location page to insert/enter the 2<sup>nd</sup> row with effective sequence 1 and select the Action of Probation / Reason of Probation. **This is the required procedure for UCB campus classified staff hires.** 

### Hire Classified Staff complete