

# 8.9 HRMS Step by Step Guide

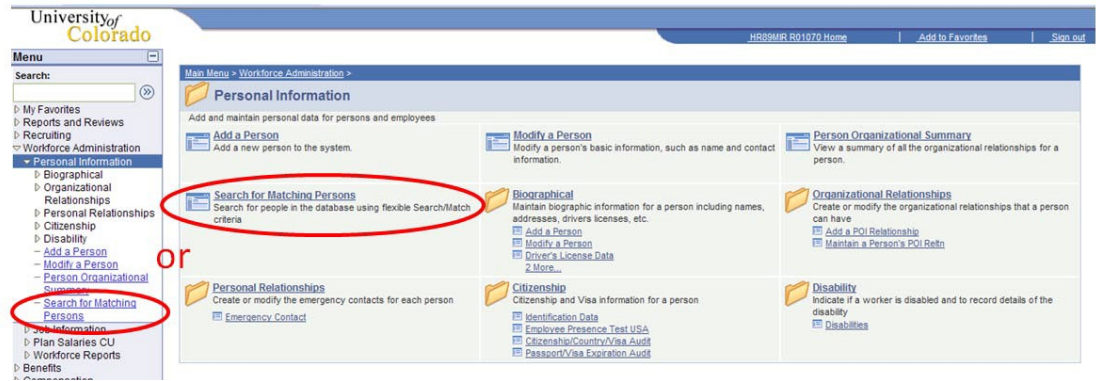
## Hire Classified Staff - Workforce Administration Module

**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.

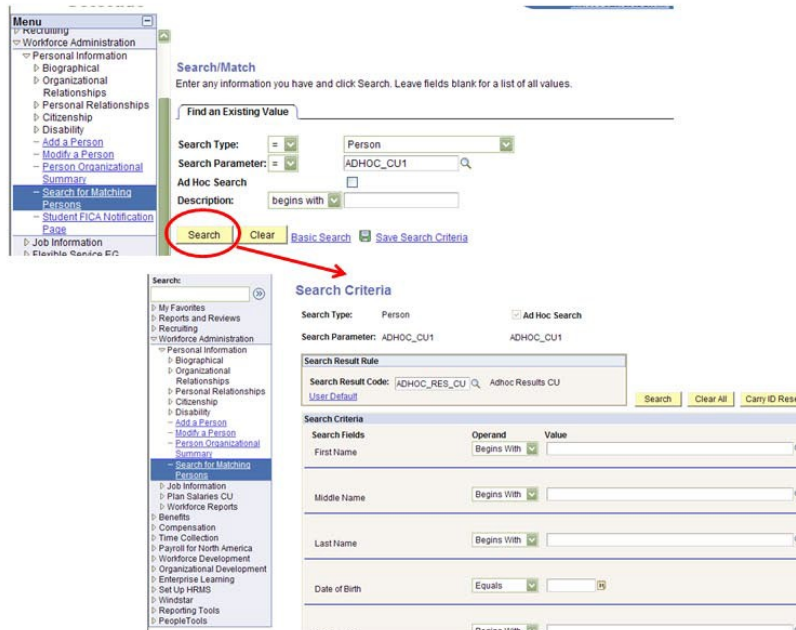
### 1. Navigate to Search for Matching Persons

- Workforce Administration
- Personal Information
  - Search for Matching Persons
- To begin, verify that the Person does not already exist in HRMS
- Click on Add a Person, and then [Search for Matching Persons](#) (or click on [Search for Matching Persons](#) 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 

### 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* step-by-step guide. (Navigation is: Workforce Administration / Job Information / Add Employment Instance or Transfer/Rehire)

#### Search Criteria

Search Type: Person  Ad Hoc Search

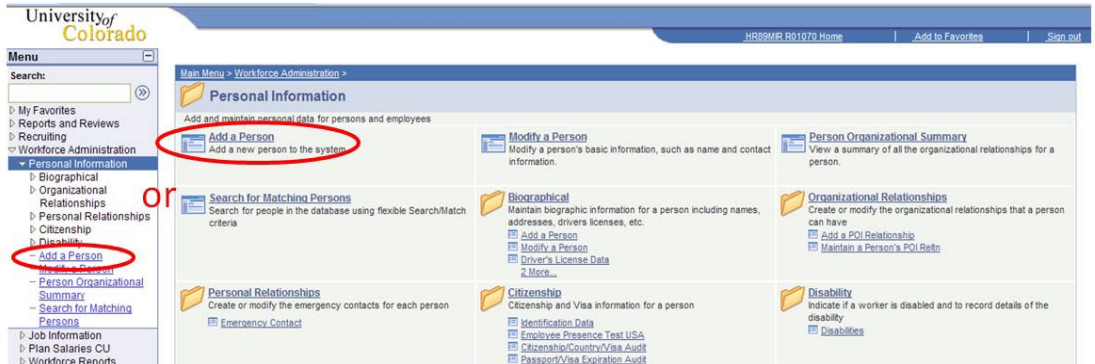
Search Parameter: ADHOC\_CU1 ADHOC\_CU1

Search Result Rule

Search Result Code: ADHOC\_RES [User Default](#) [Clear All](#) [Carry ID Reset](#)

Microsoft Internet Explorer  
 Search Criteria did not return any results (18160,43)  
 Enter new or additional Search Criteria  
 OK

Search Fields	Operand	Value
First Name	Begins With	Michael
Middle Name	Begins With	
Last Name	Begins With	Buble



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HR89MR R01070 Home | Add to Favorites | Sign out

Menu

Search:

- My Favorites
- Reports and Reviews
- Recruiting
- Workforce Administration
  - Add a Person** (circled in red)
  - Personal Information
    - Biographical
    - Organizational Relationships
    - Personal Relationships
    - Citizenship
    - Disability
    - Add a Person** (circled in red)
    - Person Organizational Summary
    - Search for Matching Persons
  - Job Information
  - Plan Salaries CU
  - Workforce Reports

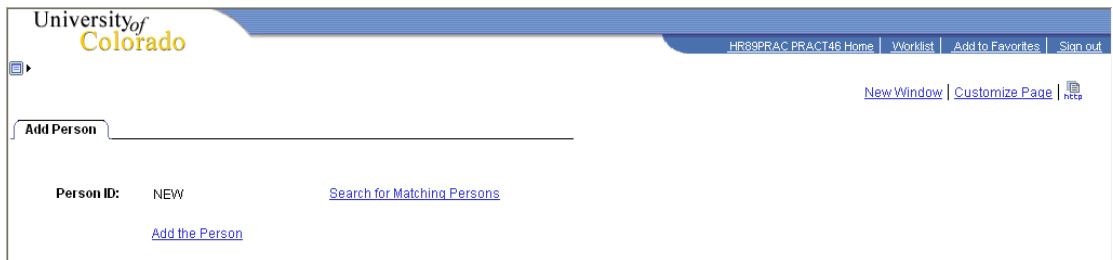
Main Menu > Workforce Administration >

**Personal Information**  
 Add and maintain personal data for persons and employees

- Add a Person**  
Add a new person to the system
- Modify a Person  
Modify a person's basic information, such as name and contact information.
- Person Organizational Summary  
View a summary of all the organizational relationships for a person.
- Biographical  
Maintain biographic information for a person including names, addresses, drivers licenses, etc.  
  - Add a Person
  - Modify a Person
  - Driver's License Data
  - 2 More...
- Organizational Relationships  
Create or modify the organizational relationships that a person can have  
  - Add a POI Relationship
  - Maintain a Person's POI Reln
- Personal Relationships  
Search for people in the database using flexible Search/Match criteria
- Personal Relationships  
Create or modify the emergency contacts for each person  
  - Emergency Contact
- Citizenship  
Citizenship and Visa information for a person  
  - Identification Data
  - Employee Presence Test USA
  - Citizenship/Country/Visa Audit
  - Passport/Visa Expiration Audit
- Disability  
Indicate if a worker is disabled and to record details of the disability  
  - Disabilities


### 4. Add Person page displays

- Click [Add the Person](#)



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HR89PRAC PRACT46 Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) | 

**Add Person**

Person ID: NEW [Search for Matching Persons](#)

[Add the Person](#)

## 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](#)

Biographical Details | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [New Window](#) | [Customize Page](#) | [Help](#)

Person ID: NEW

**Primary Name** Find | View All First 1 of 1 Last

\*Effective Date: 08/01/2010

\*Format Type: English

Display Name: [Add Name](#)

**Biographic Information**

\*Date of Birth:  0 Years 0 Months

Birth Country: USA  United States

Birth State:

Birth Location:  Waive Data Protection

**Biographical History** Find | View All First 1 of 1 Last

\*Effective Date: 08/01/2010

\*Gender: Unknown

\*Highest Education Level: A-Not Indicated

\*Marital Status: Single  As of:

Language Code:

Alternate ID:

Full-Time Student

**National ID** Customize | Find | View All First 1 of 1 Last

Country	National ID Type	National ID	Primary ID
USA <input type="button" value="v"/>	Social Security Number <input type="button" value="v"/>	<input type="text"/>	<input checked="" type="checkbox"/>

Biographical Details | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

## 6. Edit Name page displays

- Enter name information as it appears on SS card
- Click  to return to Biographical Details page

**Edit Name**

**English Name Format**

Prefix:

First Name:  Middle Name:

Last Name:

Suffix:

Display Name:

Formal Name:

Name:

## 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

- Click [Contact Information](#)

Biographical Details [Contact Information](#) [Regional](#) [Dept Information/Verifications](#)

Person ID: NEW

**Primary Name** [Find](#) | [View All](#) First 1 of 1 Last

\*Effective Date: 08/01/2010

\*Format Type: English

Display Name: **Mary, Weather** [Edit Name](#)

**Biographic Information**

\*Date of Birth: **01/01/1970** 40 Years 7 Months

Birth Country: USA United States

Birth State:

Birth Location:  Waive Data Protection

**Biographical History** [Find](#) | [View All](#) First 1 of 1 Last

\*Effective Date: 08/01/2010

\*Gender: **Female**

\*Highest Education Level: A-Not Indicated

\*Marital Status: Single As of:

Language Code:

Alternate ID:   Full-Time Student

**National ID** [Customize](#) | [Find](#) | [View All](#) First 1 of 1 Last

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number	<b>999-77-5555</b>	<input checked="" type="checkbox"/>

[Save](#) [Notify](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[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.

Biographical Details [Contact Information](#) [Regional](#) [Dept Information/Verifications](#) [Organizational Relationships](#)

Person ID: NEW

**Current Addresses** [Customize](#) | [Find](#) | [View All](#) First 1 of 1 Last

Address Type	As Of Date	Status	Address
Home	08/01/2010		

[Add Address Detail](#)

**Phone Information** [Customize](#) | [Find](#) | [View All](#) First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred
	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

**Email Addresses** [Customize](#) | [Find](#) | [View All](#) First 1 of 1 Last

*Email Type	*Email Address	Preferred
Campus	<input type="text"/>	<input type="checkbox"/>

[Save](#) [Notify](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

## 9. Address History page displays

- Change Country, if applicable
- Click [Add Address](#)

**Address History**

Address Type: Home

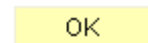
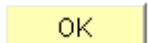
**Address History** [Find](#) First 1 of 1 Last

*Effective Date	Country	*Status	Address:
08/01/2010	USA	A	

[Add Address](#)

[OK](#) [Cancel](#)

## 10. Edit Address page displays

- Enter address
- Click  and then  again


## 11. Contact Information page re-displays

- If Mailing address is different than Home address, click + by  to add a record.


- Select "Mailing" from the dropdown menu and then



- 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 

## Edit Address


Country: United States

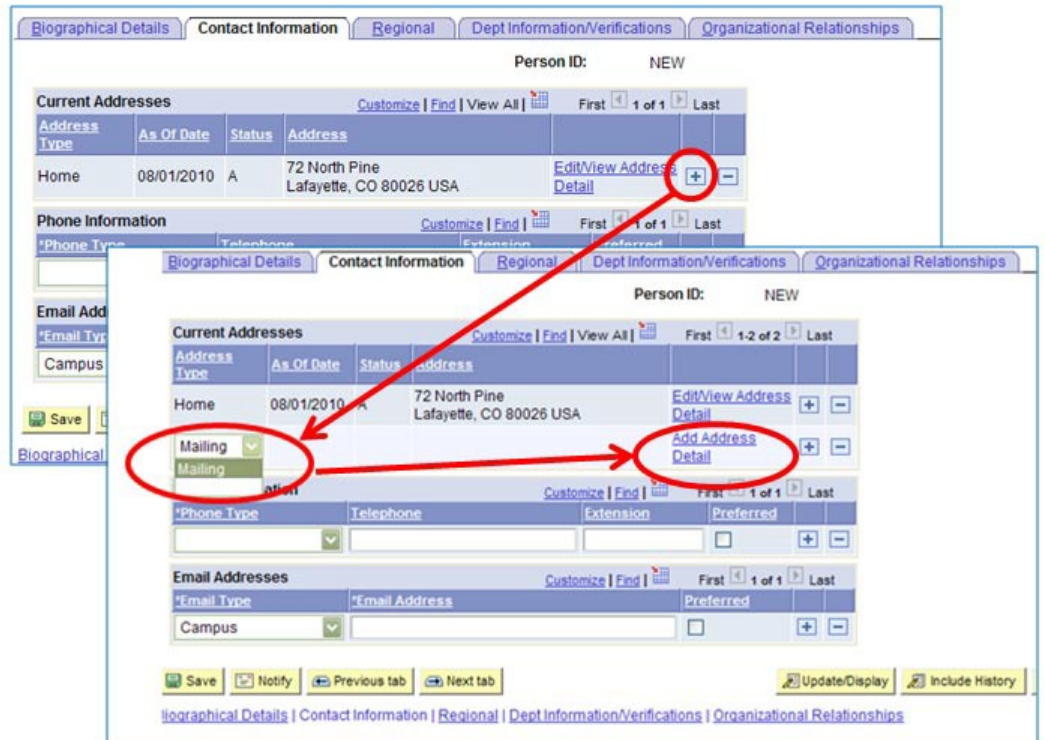
Address 1:

Address 2:



City:  State:   Colorado Postal:

County:



Person ID: NEW

Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	08/01/2010	A	72 North Pine Lafayette, CO 80026 USA	 

Phone Information

\*Phone Type:

Telephone:

Extension:

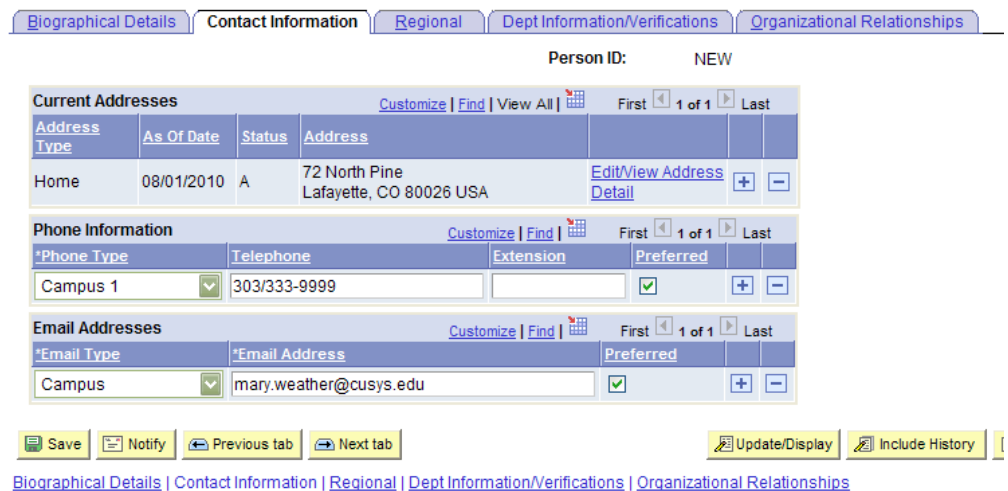
Preferred:

Email Addresses



\*Email Type:

\*Email Address:

Preferred:



Person ID: NEW

Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	08/01/2010	A	72 North Pine Lafayette, CO 80026 USA	 

Phone Information

\*Phone Type:

Telephone:

Extension:

Preferred:


Email Addresses

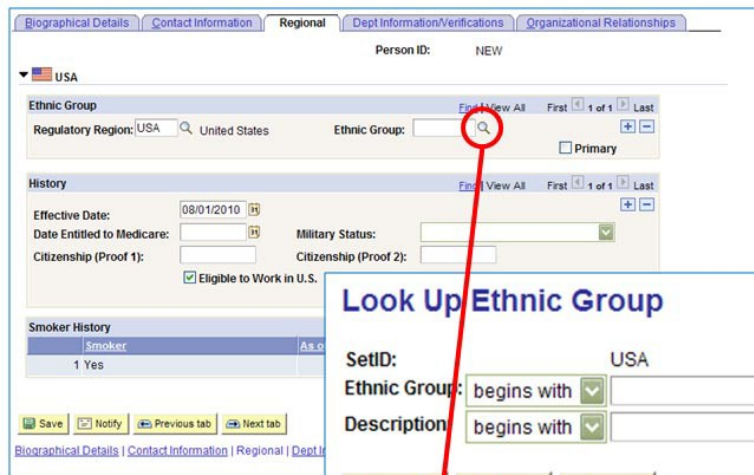
\*Email Type:

\*Email Address:

Preferred:

## 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 




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


Person ID: NEW


USA

Ethnic Group Find | View All First 1 of 1 Last

Regulatory Region: USA United States Ethnic Group:    Primary

History Find | View All First 1 of 1 Last

Effective Date: 08/01/2010  

Date Entitled to Medicare:  





Military Status:

Citizenship (Proof 1):  Citizenship (Proof 2):

Eligible to Work in U.S.

Smoker History

Smoker	As of
1 Yes	

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

### Look Up Ethnic Group

SetID: USA

Ethnic Group: begins with

Description: begins with

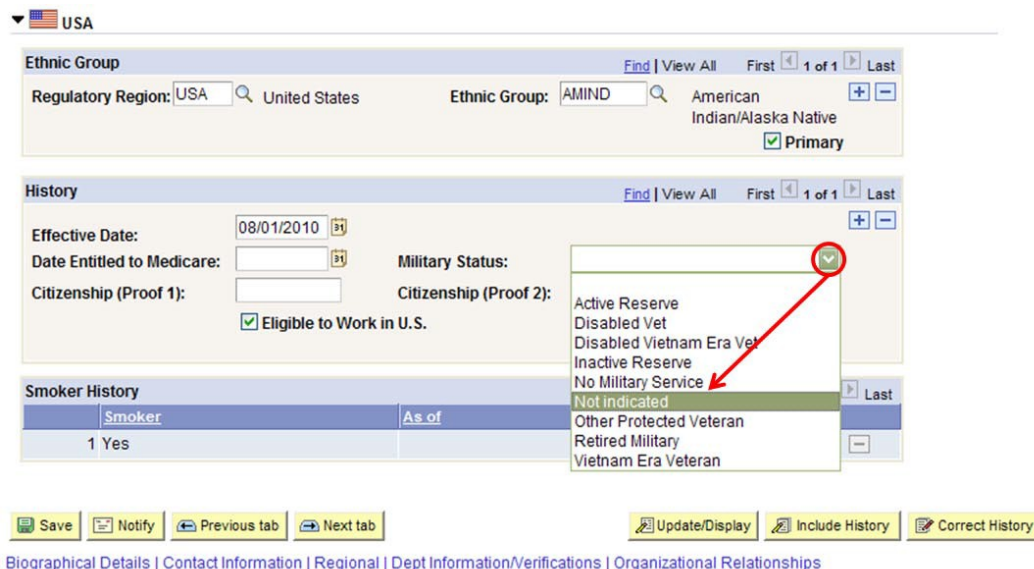
   [Basic Lookup](#)

### Search Results

View All First 1-7 of 7 Last

Ethnic Group	Description	Short Description
<a href="#">AFRAM</a>	<a href="#">African American</a>	<a href="#">Afr Amer</a>
<a href="#">AMIND</a>	<a href="#">American Indian/Alaska Native</a>	<a href="#">Am. Ind</a>
<a href="#">ASIAN</a>	<a href="#">Asian</a>	<a href="#">Asian</a>
<a href="#">CAUCASIA</a>	<a href="#">Caucasian</a>	<a href="#">Caucasian</a>
<a href="#">HISPA</a>	<a href="#">Hispanic/Latino</a>	<a href="#">Hispanic</a>
<a href="#">NSPEC</a>	<a href="#">Chose not to Disclose</a>	<a href="#">No Dsclosed</a>
<a href="#">PACIF</a>	<a href="#">Native Hawaiian/Other Pacific Islander</a>	<a href="#">Hawaii/Pac</a>

- 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





USA


Ethnic Group Find | View All First 1 of 1 Last

Regulatory Region: USA United States Ethnic Group: AMIND American Indian/Alaska Native  Primary

History Find | View All First 1 of 1 Last

Effective Date: 08/01/2010  

Date Entitled to Medicare:  

Military Status:  





Citizenship (Proof 1):  Citizenship (Proof 2):




Eligible to Work in U.S.

Smoker History

Smoker	As of
1 Yes	

Active Reserve  
Disabled Vet  
Disabled Vietnam Era Vet  
Inactive Reserve  
No Military Service  
**Not Indicated**  
Other Protected Veteran  
Retired Military  
Vietnam Era Veteran

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

### 13. Dept Information/ Verifications page displays

- Home Department and Campus Box are required.

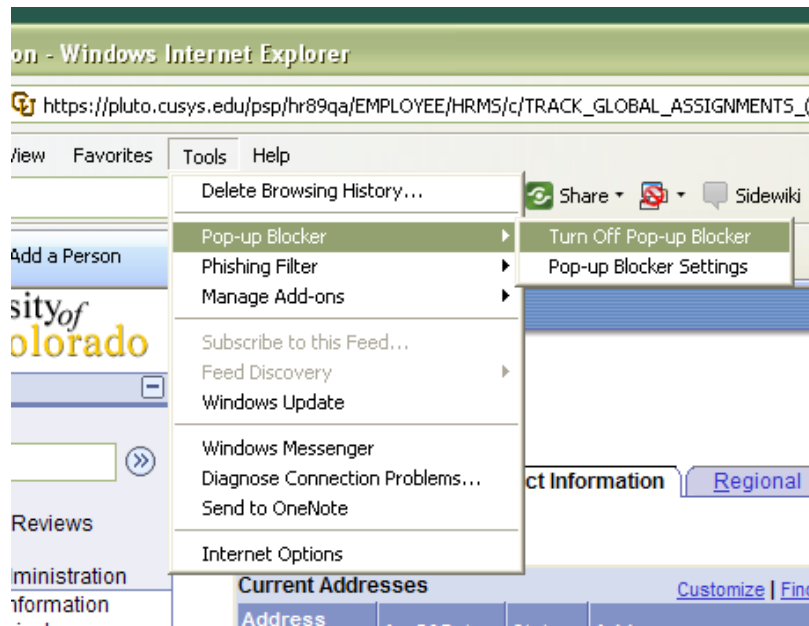
- Click

[Organizational Relationships](#)


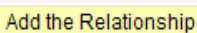
### 14. Organizational Relationships page displays

- 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  or 

## 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

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

- Click 
- Enter note/comments
- Click on [Job Data Page](#) link to return to page
- Click on 





## 17. Job Information page displays

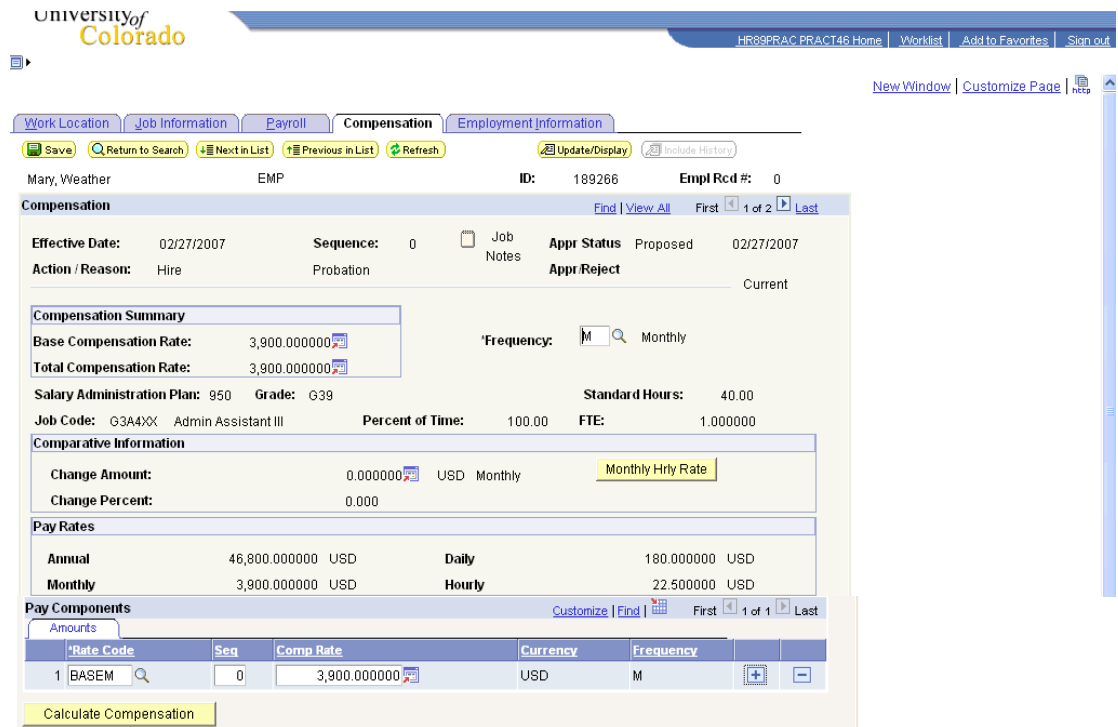
- Reports To defaults from position data
- Employee Class will default from Job Code upon saving
- Percent of Time and Standard Hours default from position data and can be updated. A change to either one updates the other
- Click [Payroll](#)

## 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](#)

## 19. Compensation page displays

- Frequency: Verify that M (monthly) has defaulted
- In Pay Components section:
  - Enter monthly Rate Code of BASEM
  - Enter monthly Comp Rate
- Click 
- Click 



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HR89PRAC PRACT46 Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | Help

Work Location | Job Information | Payroll | **Compensation** | Employment Information

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Mary, Weather EMP ID: 189266 Empl Rcd #: 0

Compensation Find | View All First 1 of 2 Last

Effective Date: 02/27/2007 Sequence: 0 Job Notes Appr Status: Proposed 02/27/2007  
 Action / Reason: Hire Probation Appr/Reject: Current

**Compensation Summary**

Base Compensation Rate: 3,900.000000 USD  
 Total Compensation Rate: 3,900.000000 USD  
 Frequency: M Monthly

Salary Administration Plan: 950 Grade: G39 Standard Hours: 40.00  
 Job Code: G3A4XX Admin Assistant III Percent of Time: 100.00 FTE: 1.000000

**Comparative Information**

Change Amount: 0.000000 USD Monthly Monthly Hrly Rate  
 Change Percent: 0.000

**Pay Rates**

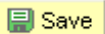
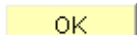
Rate	Amount	Currency	Frequency	Amount	Currency
Annual	46,800.000000	USD	Daily	180.000000	USD
Monthly	3,900.000000	USD	Hourly	22.500000	USD

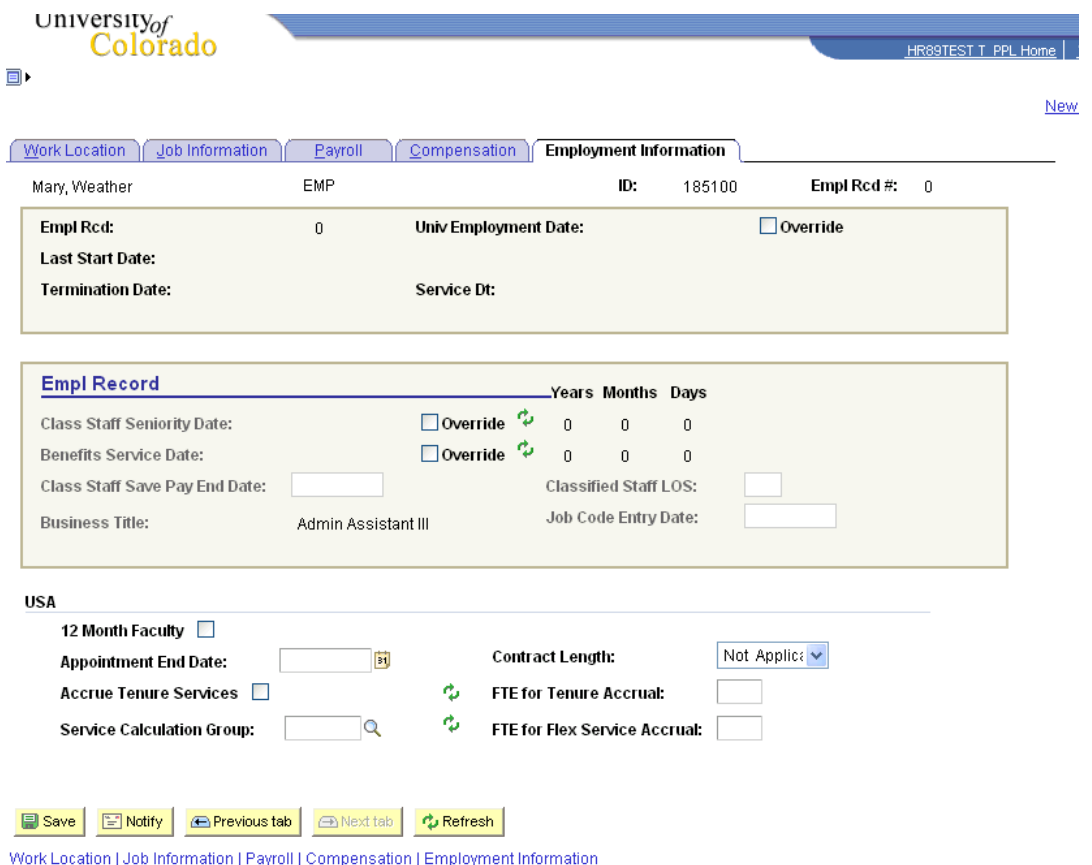
**Pay Components** Customize | Find First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency
1 BASEM	0	3,900.000000	USD	M

Calculate Compensation

## 20. Employment Information page displays

- Enter Appointment End Date, if applicable. (Generally not used for classified)
- Review data
- Click  or  \*
- For new hires, system automatically transfers to Emergency Contact page



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HR89TEST T PPL Home

New

Work Location | Job Information | Payroll | Compensation | **Employment Information**

Mary, Weather EMP ID: 185100 Empl Rcd #: 0

Empl Rcd: 0 Univ Employment Date:  Override  
 Last Start Date:  
 Termination Date: Service Dt:

**Empl Record**

	Years	Months	Days
Class Staff Seniority Date: <input type="checkbox"/> Override	0	0	0
Benefits Service Date: <input type="checkbox"/> Override	0	0	0

Class Staff Save Pay End Date:  Classified Staff LOS:   
 Business Title: Admin Assistant III Job Code Entry Date:

USA

12 Month Faculty

Appointment End Date:  Contract Length: Not Applic.



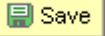
Accrue Tenure Services  FTE for Tenure Accrual:   
 Service Calculation Group:  FTE for Flex Service Accrual:

Save | Notify | Previous tab | Next tab | Refresh

Work Location | Job Information | Payroll | Compensation | Employment Information


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 

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HR98TEST.T PPL Home | Worklist | Add to Favorites | Sign

[New Window](#) | [Customize Page](#) | 

Contact Address/Phone | [Other Phone Numbers](#)

Mary, Weather Emplid: 185100

Emergency Contact [Find](#) | [View All](#) First 1 of 1 Last

\*Contact Name: Stormy Weather  


\*Relationship to Employee: Spouse  Primary Contact

Same Address as Employee

Same Phone as Employee

[Return to Personal Data](#)



Contact Address

Country: USA  United States

Address: [Edit Address](#)

Contact Phone

Phone:

 [Return to Search](#) 

[Contact Address/Phone](#) | [Other Phone Numbers](#)

**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. After saving the emergency contact information, 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