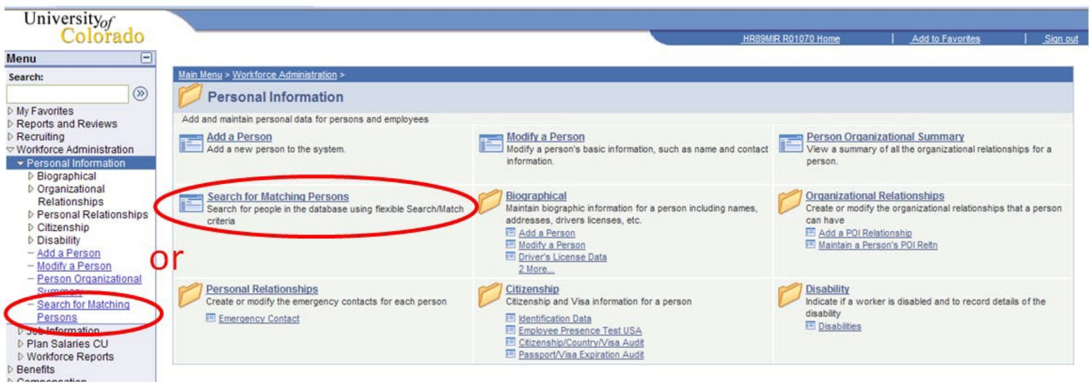
8.9 HRMS Step by Step Guide
Hire Classified Staff - Workforce Administration Module

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.*

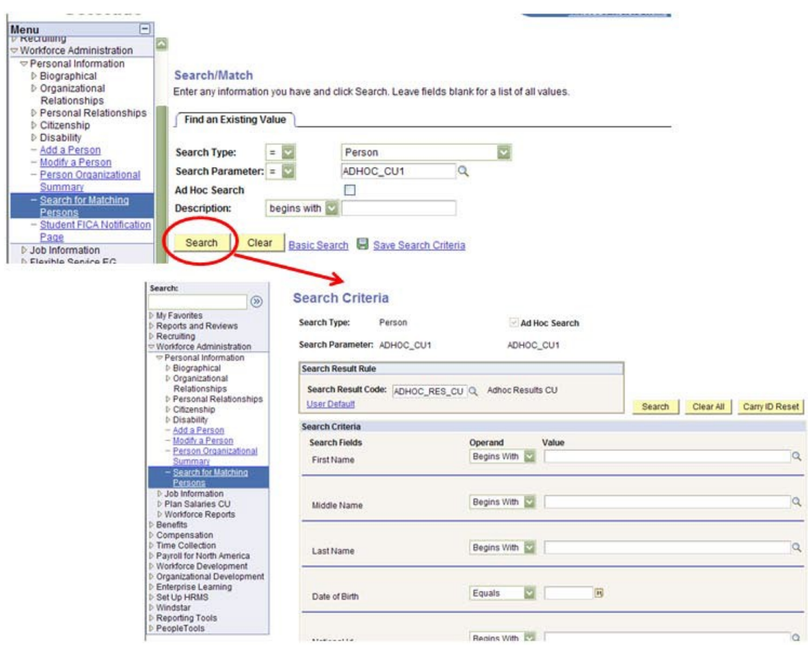
1. Navigate to Search for Matching Persons

- Workforce Administration
- Personal Information
- To begin, verify that the Person does not already exist in HRMS
- Click on Add a Person, and then **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

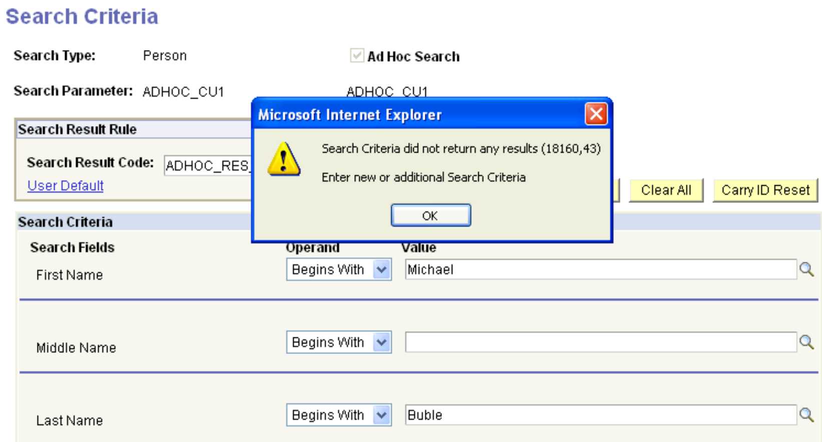
- Click Search

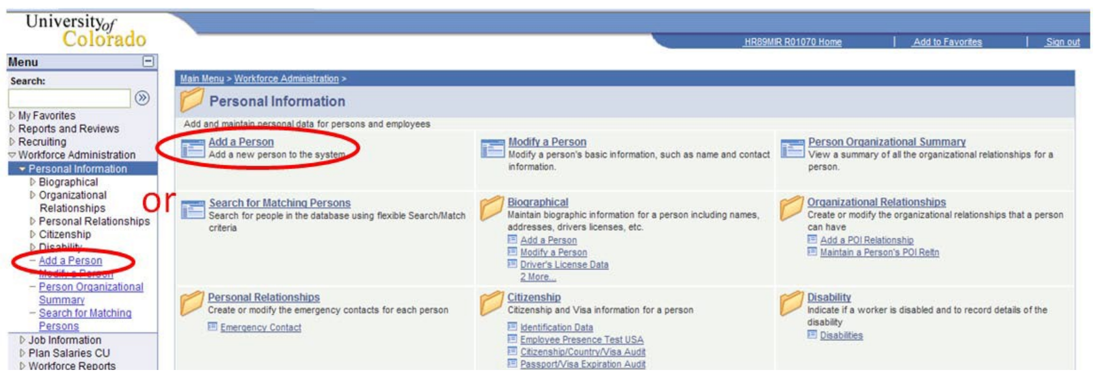
3. When person does not already exist in HRMS, begin the Add a Person process

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



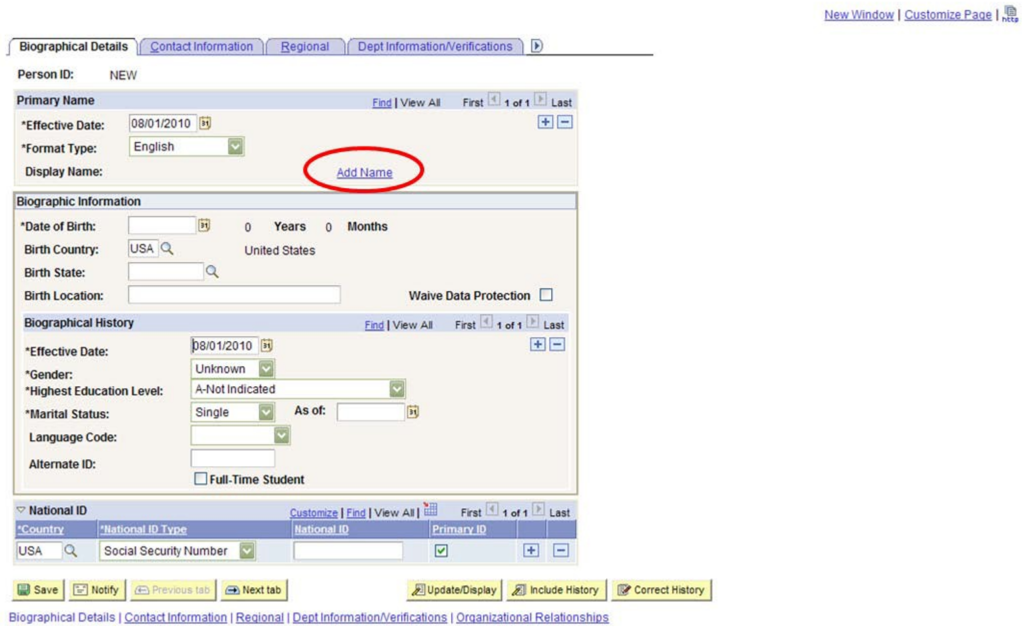


4. Add Person page displays

- Click Add the Person

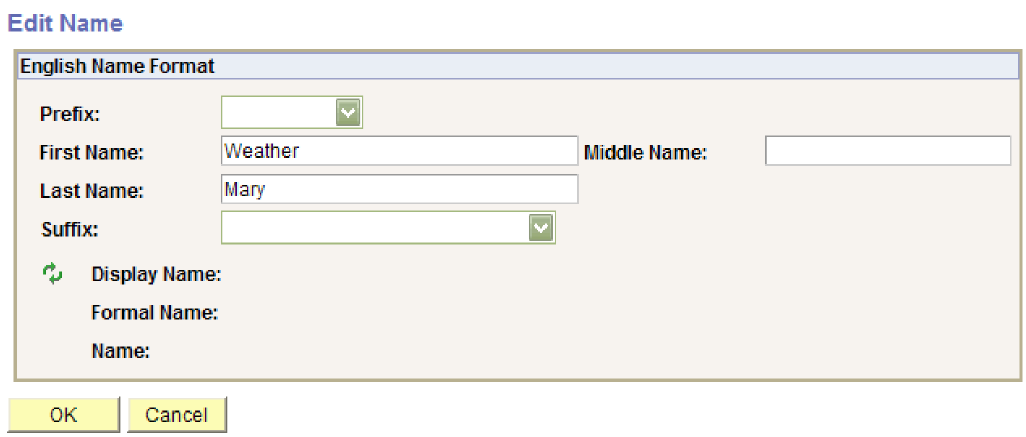
5. Biographical Details page displays

- 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



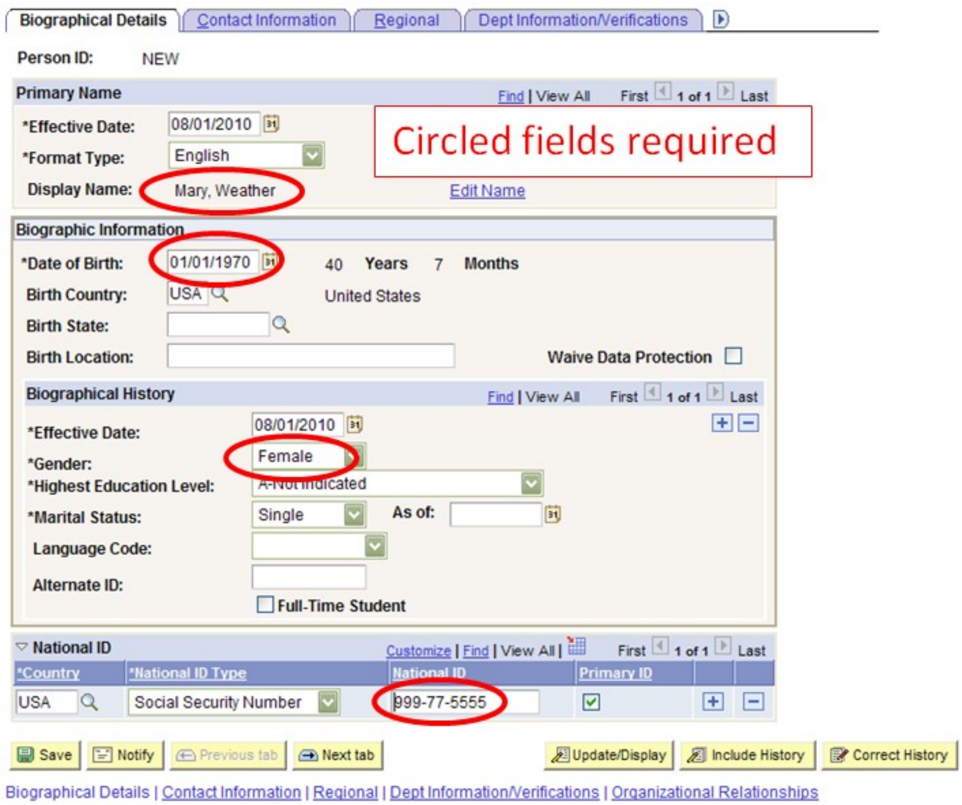
6. Edit Name page displays

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



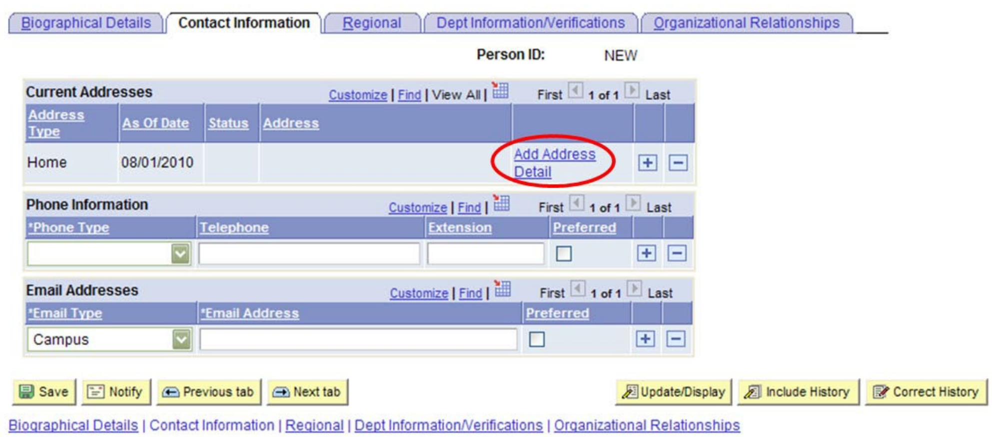
7. Biographical Details page re-displays

- 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



8. Contact Information page displays

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

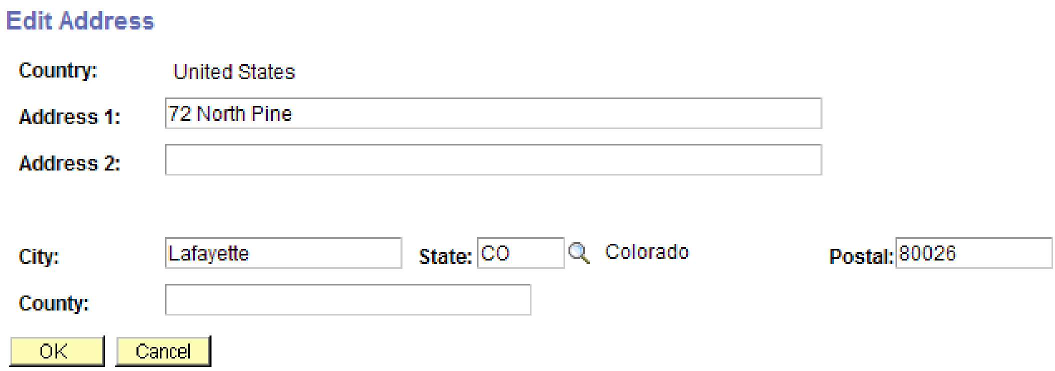


9. Address History page displays

- Change Country, if applicable
- Click Add Address

10. Edit Address page displays

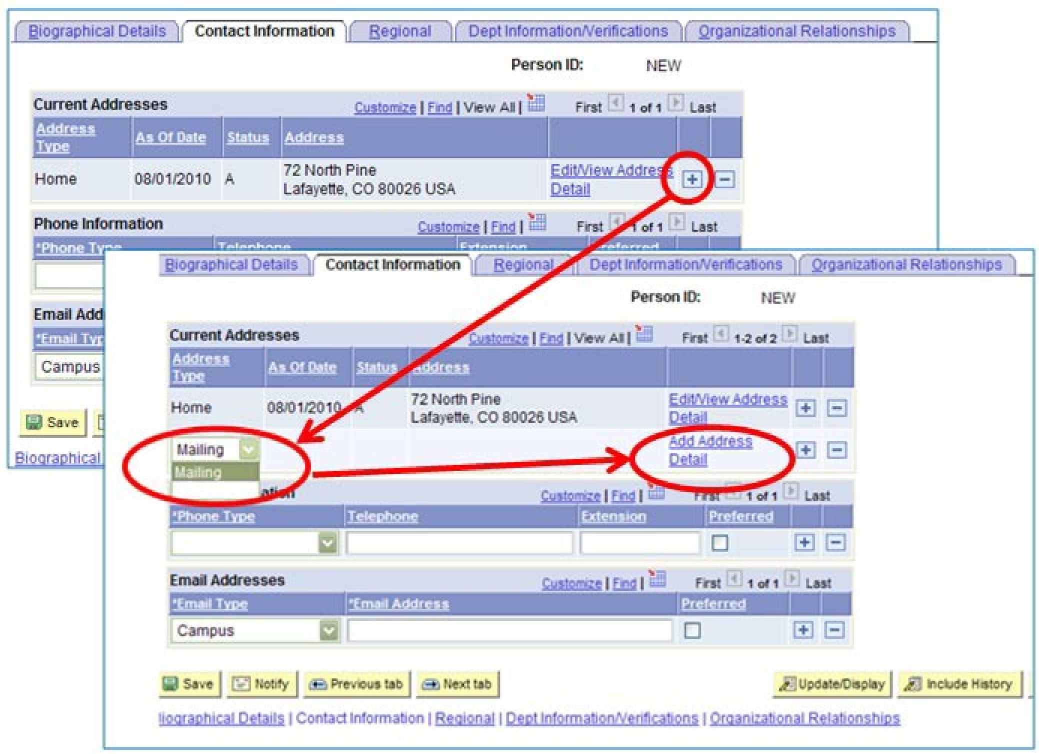
- Enter address
- Click OK and then OK again

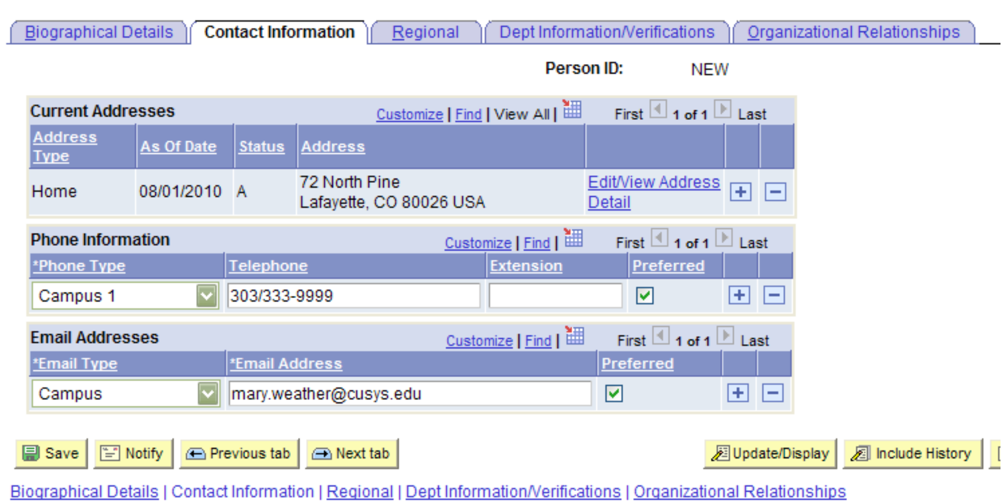


11. Contact Information page re-displays

- **If Mailing address is different than Home address**, click + by Edit/View 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

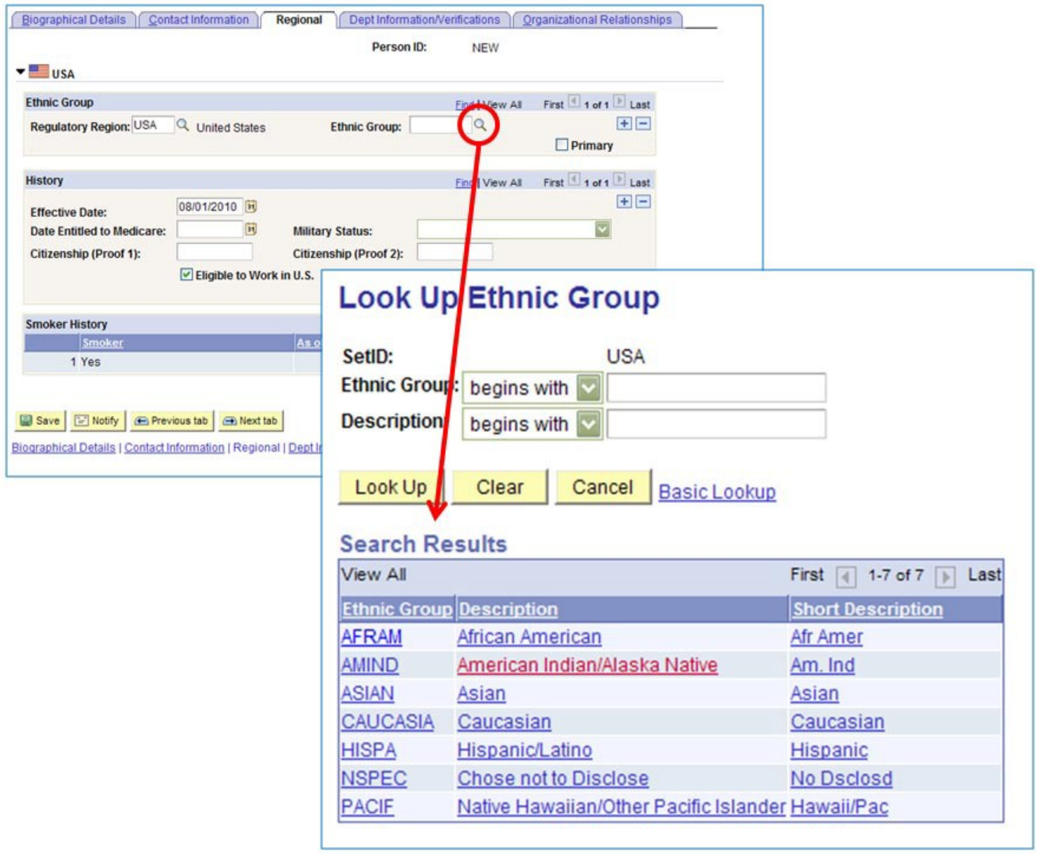




- Click Regional

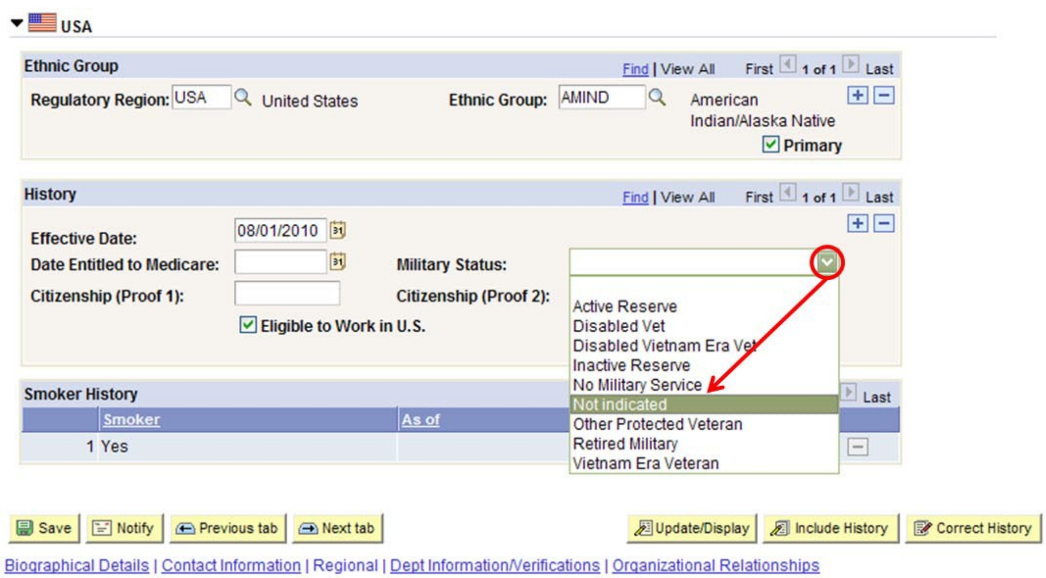
12. Regional page displays

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



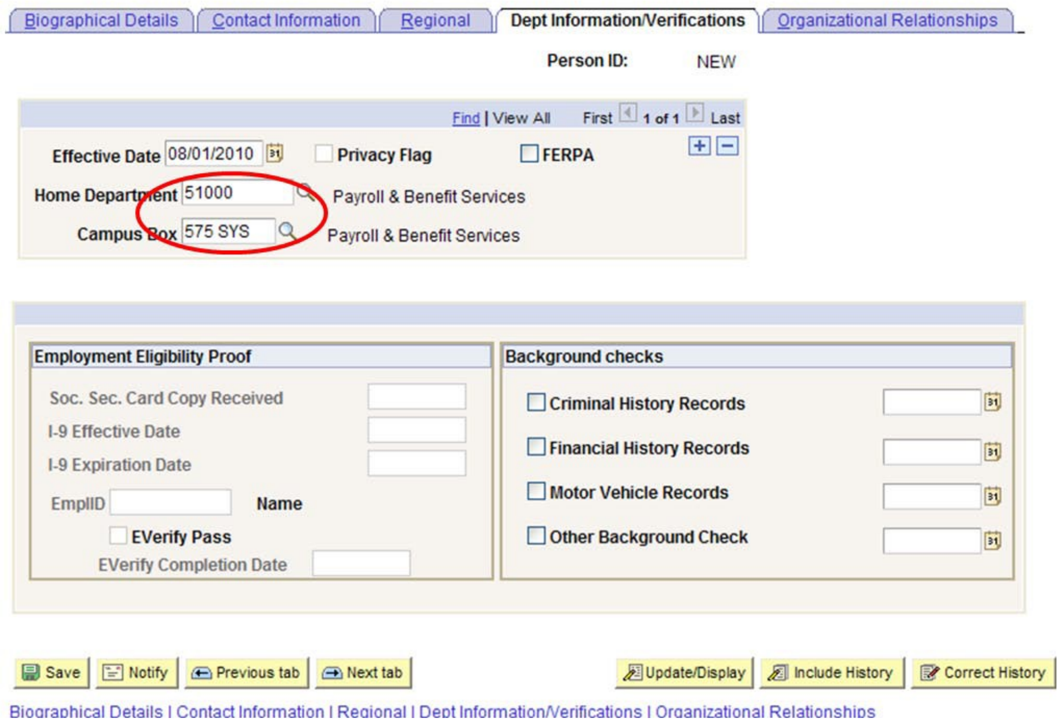
- Click Military Status dropdown menu and choose status if known, or "Not Indicated" if unknown. This field must be populated in order to anchor the effective date on this page.
- Click

Dept Information/Verifications



13. Dept Information/ Verifications page displays

- Home Department and Campus Box are required.

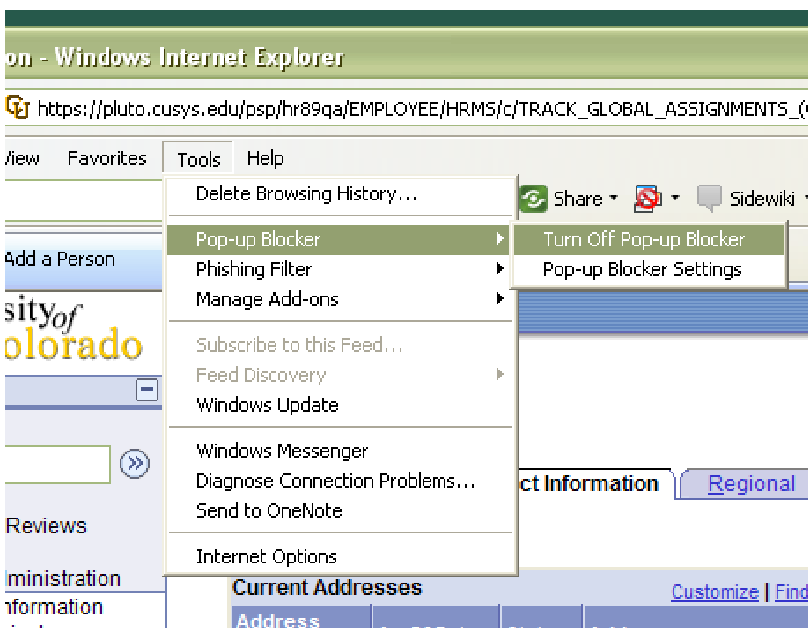


- Click Organizational Relationships

14. Organizational Relationships page displays

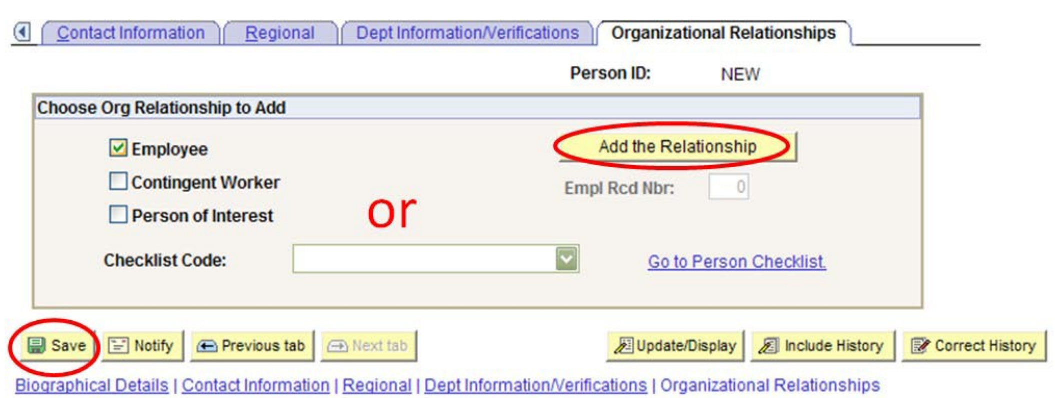
- ***Note:* Before saving record, be sure Pop-up blockers are off!!! See below.**

- 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

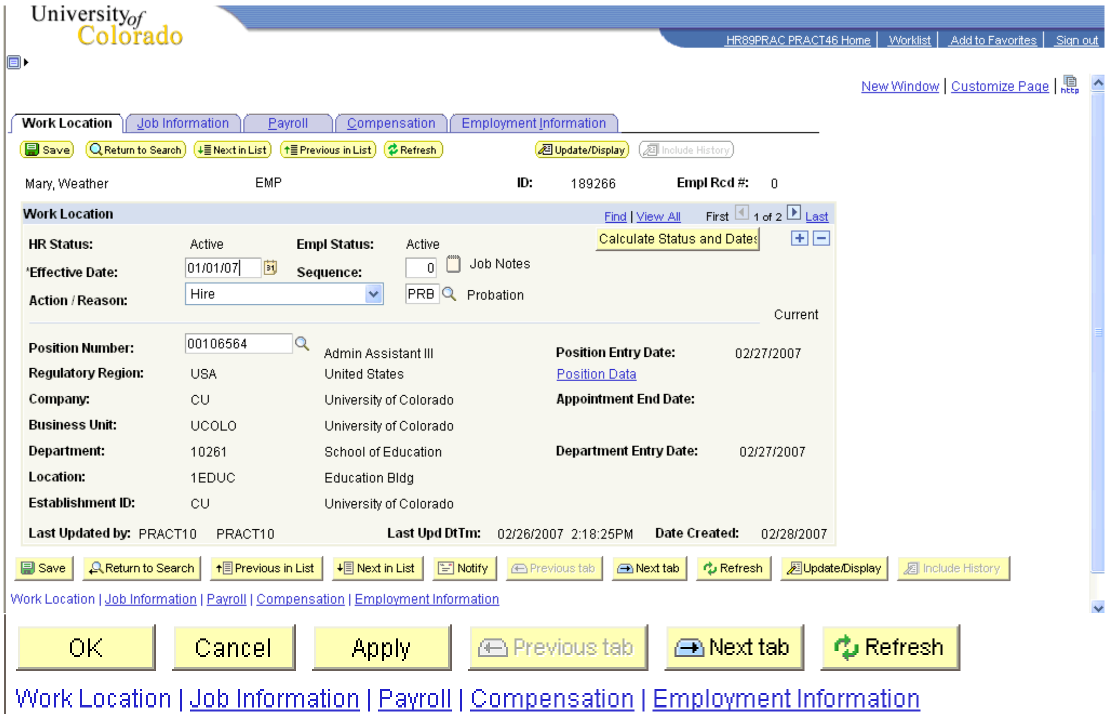
- Enter date of hire
- ***Hire*** Action defaults

- 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



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.*

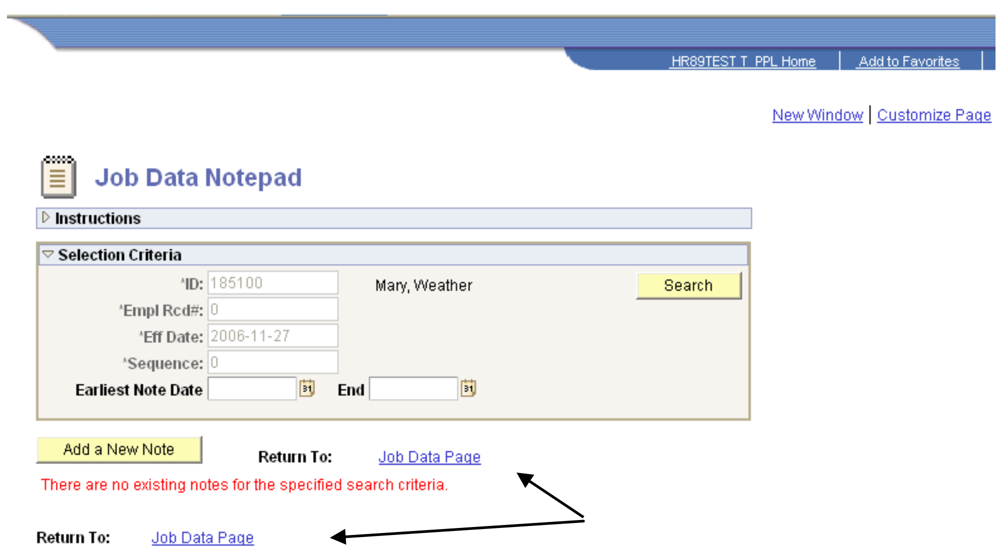
16. Notepad page displays

- Click Add a New Note

- Enter note/comments

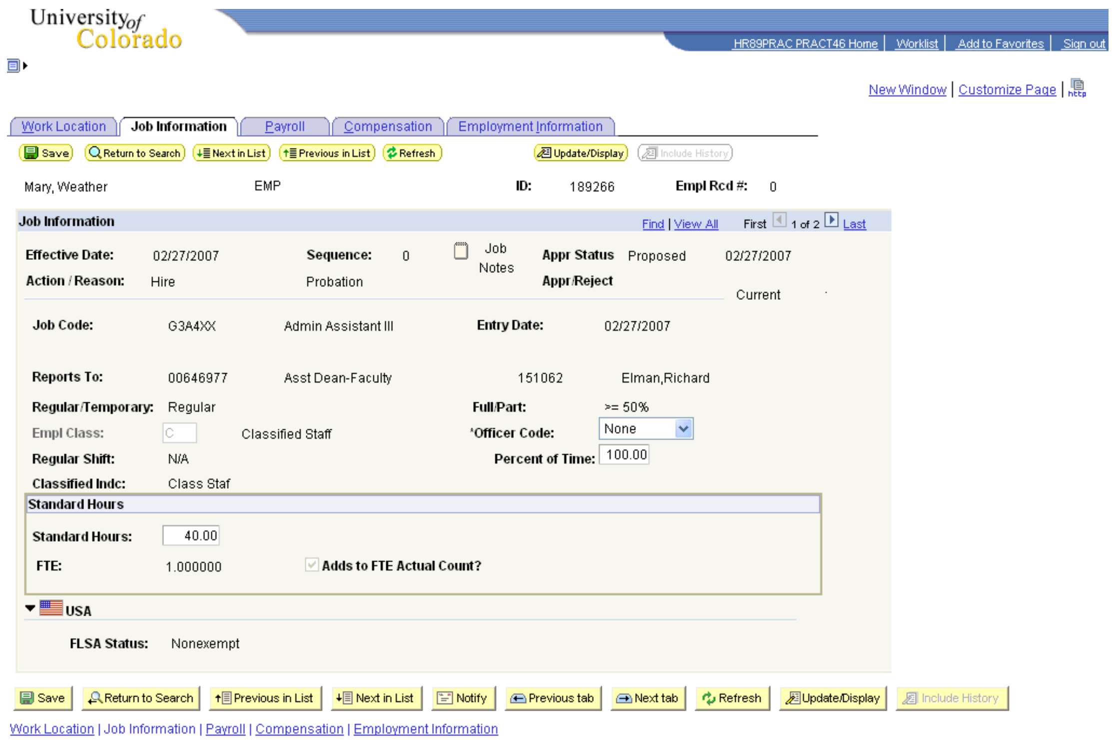
- Click on Job Data Page link to return to page

- Click on Job Information



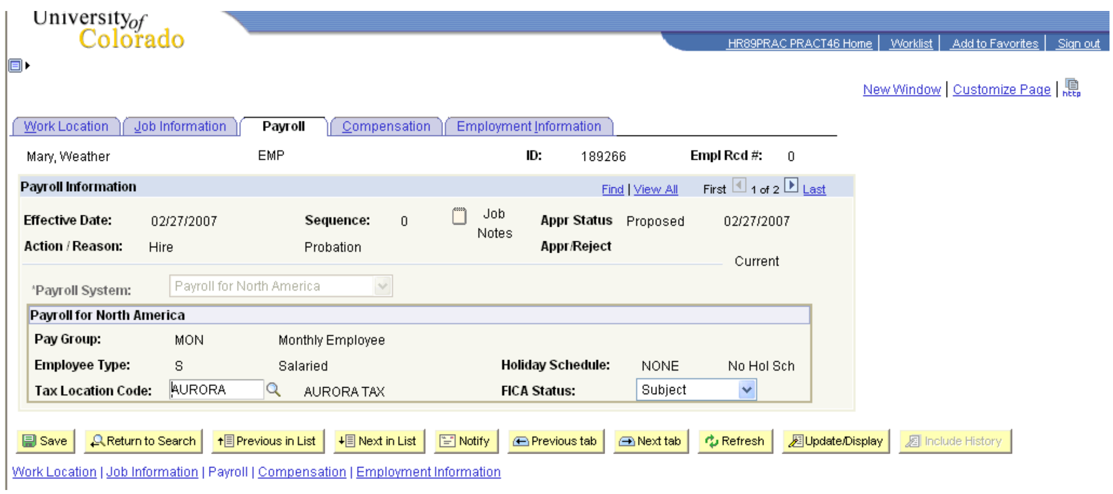
17. Job Information page displays

- 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



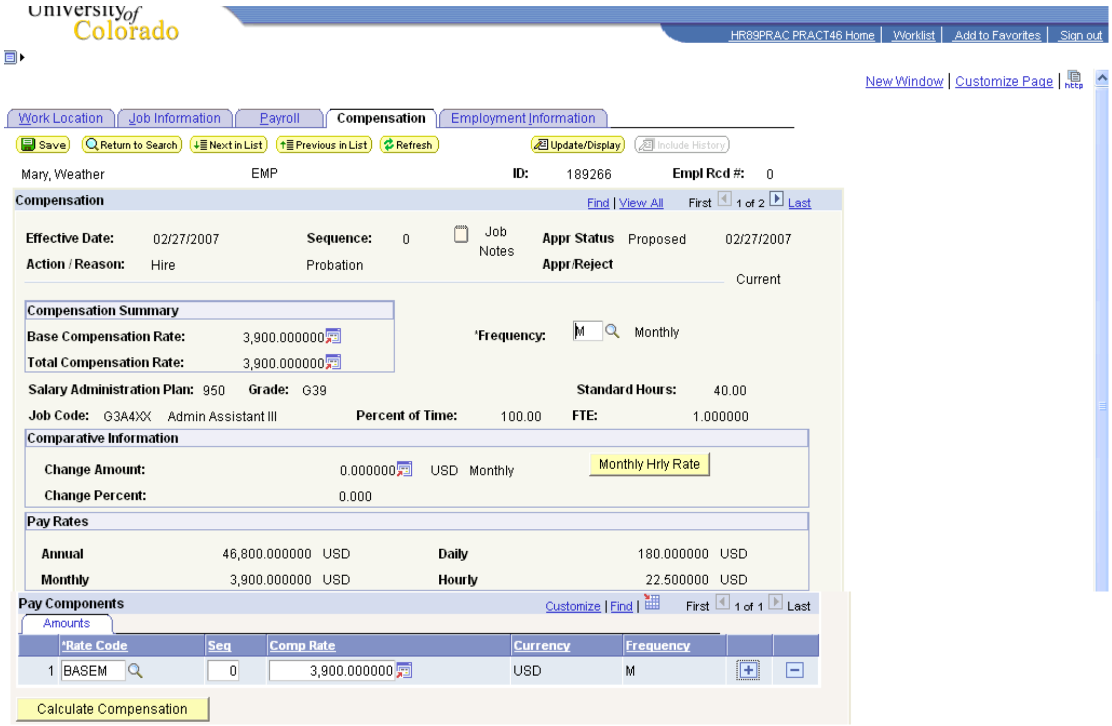
18. Payroll page displays

- 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



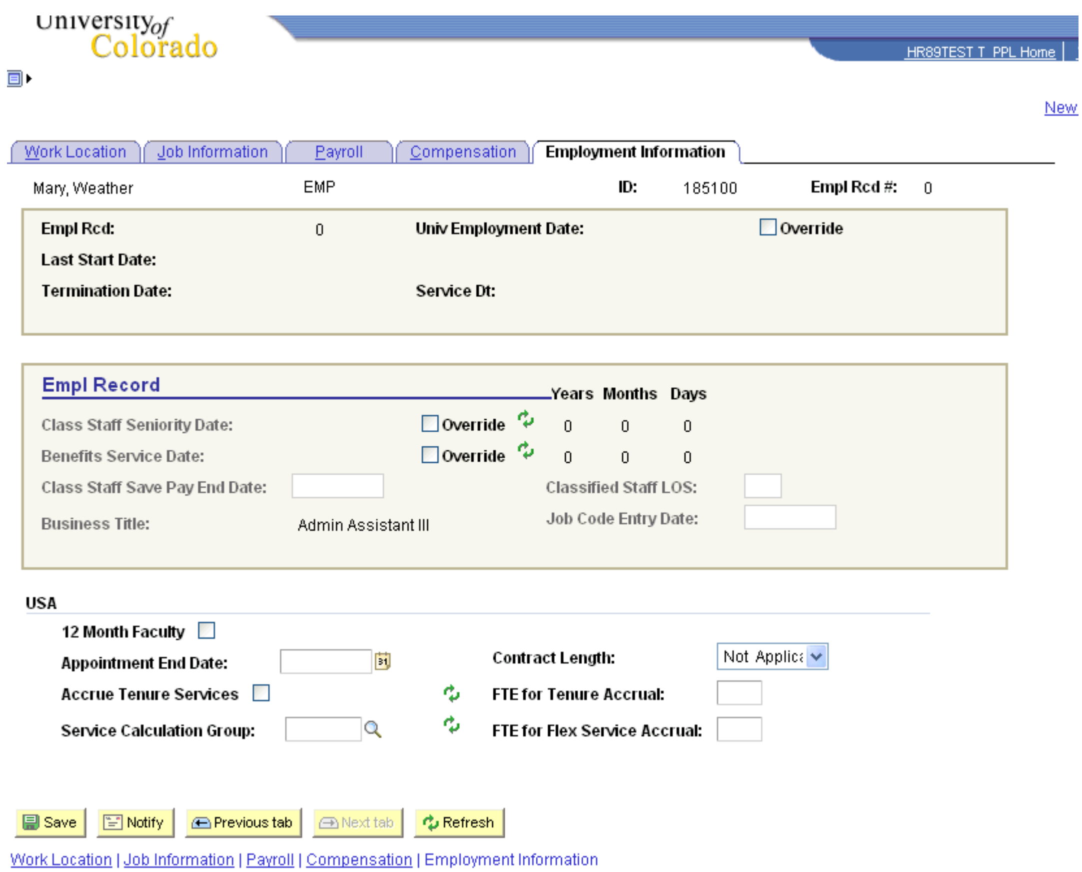
19. Compensation page displays

- Frequency: Verify that M (monthly) has defaulted
- In Pay Components section:
  a) Enter monthly Rate Code of BASEM
  b) Enter monthly Comp Rate
- Click Calculate Compensation
- Click Employment Information



20. Employment Information page displays

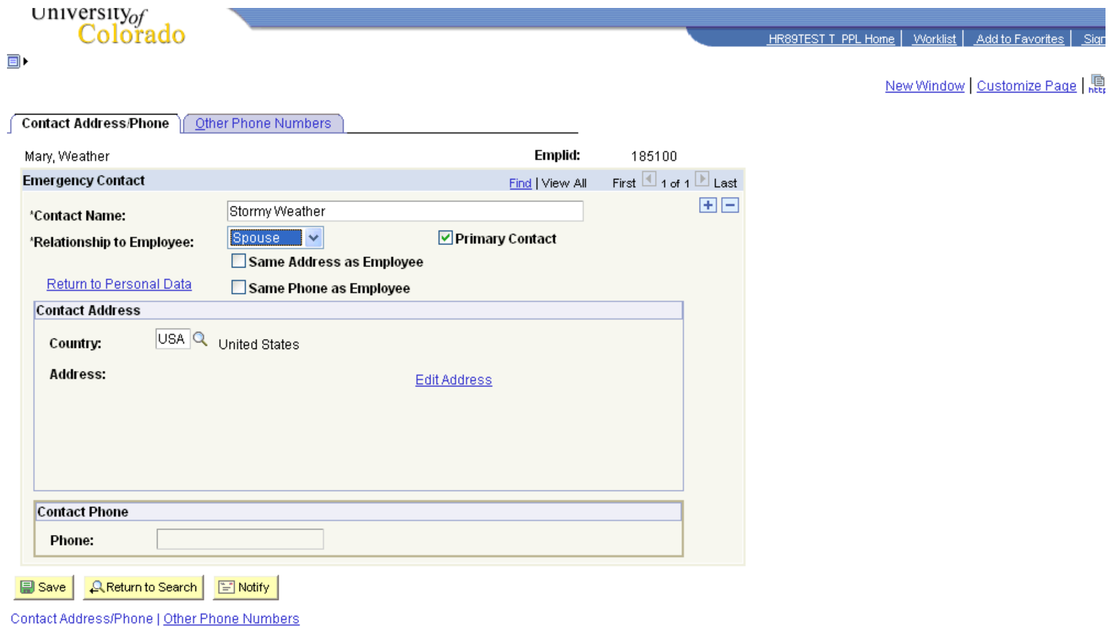
- Enter Appointment End Date, if applicable. (Generally not used for classified)
- Review data
- Click Save or OK *
- For new hires, system automatically transfers to Emergency Contact page



*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. After saving the emergency contact information, return to the new employee's Job Data / Work Location page to insert/enter the 2nd 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