CU 8.9 HRMS Step by Step Guide

Hire Regular Faculty - Monthly Pay Frequency - Workforce Administration Module

Overview: This guide provides instruction for hiring a regular faculty member on a monthly (not contract) pay frequency cycle. (Generally used for medical faculty.)

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

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)
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**

Circled fields required
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

- **Note:** Mailing address must be a local Colorado address
- 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...
13. Dept Information/Verifications page displays

- Home Department and Campus Box are required.

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**
15. Work Location page displays

- Enter date of hire
- **Hire** action defaults
- Enter Reason from Look Up list
- Enter position number*
- Job Notes may be added on any page 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

- Empl 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
- Reports To defaults from position data
- Click Payroll

18. Payroll page displays

- All fields default
- Tax Location Code & FICA Status default from job code and location code. Can be updated if needed, but system will set the final FICA Status
- Click Compensation
19. Compensation page displays

- Frequency defaults to “C” (Contract) based on job code. Change to “M” for monthly pay cycle

- 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

- Because Comp Frequency is Monthly, click 12 Month Faculty which will automatically set up Vacation and Sick Leave accruals for employee

- Enter Appointment End Date, if applicable

- Review and Save* 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

- **Enter Contact Name & Relationship to Employee**
- **Identify Primary Contact by clicking on checkbox**
- **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 and Save**
Hire Regular Faculty - Monthly Pay Cycle complete