

CU 8.9 HRMS Step by Step Guide

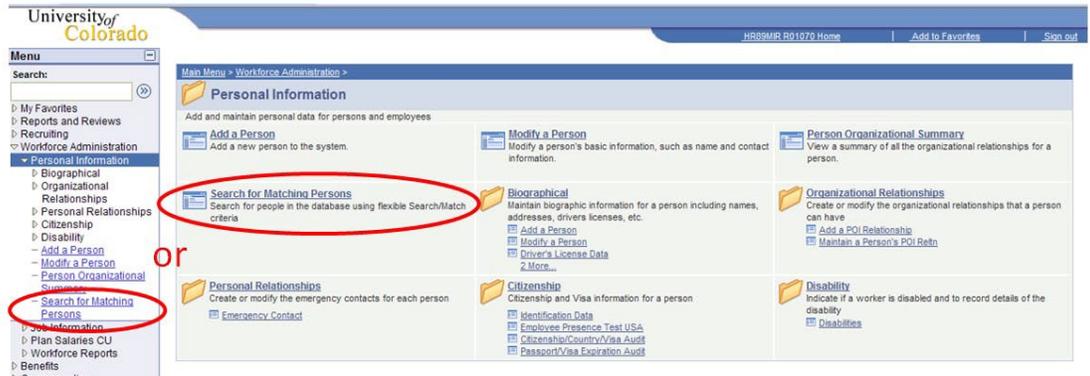
Hire New Student Hourly or Work Study - Workforce Administration Module

Overview: This guide provides instruction on hiring student hourly or work study employees.

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

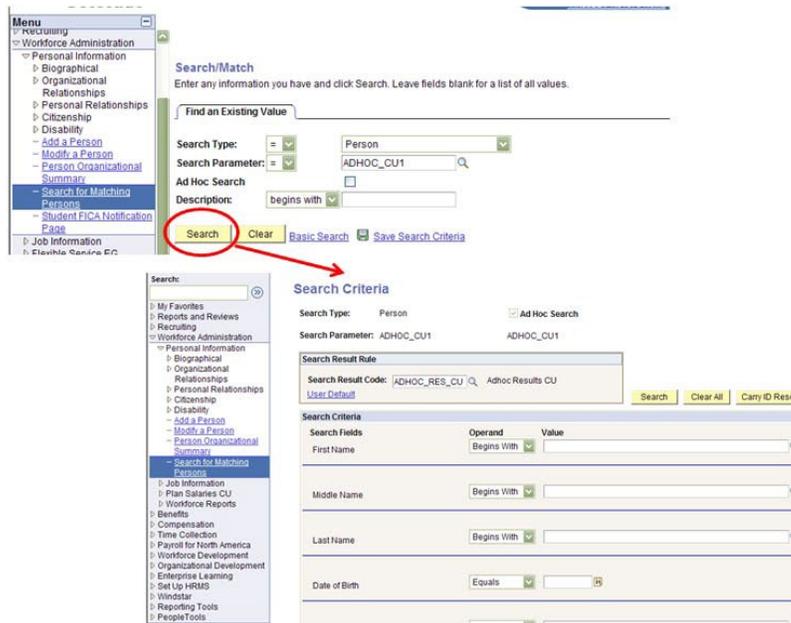
1. Navigate to Search for Matching Persons

- 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

- Enter as many fields as available
- 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

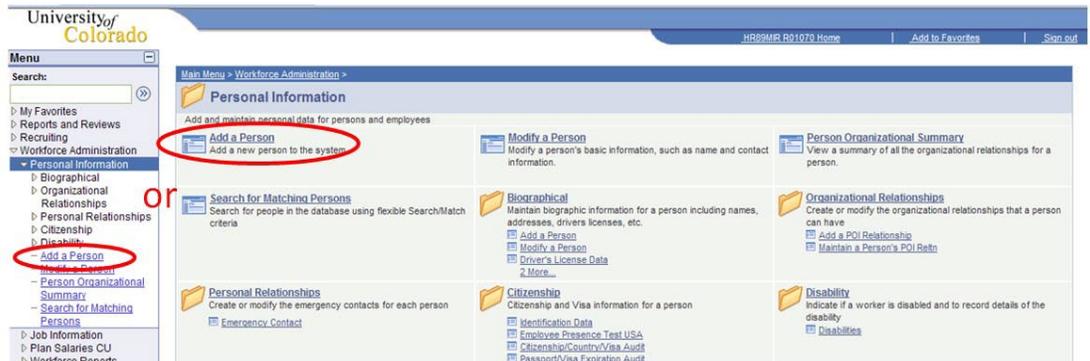
Microsoft Internet Explorer

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



University of Colorado

HRMS R01070 Home | Add to Favorites | Sign out

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**
Create or modify the emergency contacts for each person
 - Emergency Contact
- Citizenship**
Citizenship and Visa information for a person
 - Identification Data
 - Employee Residence 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

Menu

Search:

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

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

The screenshot shows the University of Colorado HR system interface. At the top, there is a navigation bar with links for Home, Worklist, Add to Favorites, and Sign out. The main content area is titled 'Add Person' and shows a form for entering a new person's information. The 'Person ID' is set to 'NEW'. Below this, there are tabs for 'Biographical Details', 'Contact Information', 'Regional', and 'Dept Information/Verifications'. The 'Biographical Details' tab is active, showing fields for 'Primary Name', 'Effective Date' (08/01/2010), 'Format Type' (English), and 'Display Name' (Add Name). Below this is the 'Biographic Information' section with fields for 'Date of Birth', 'Birth Country' (USA), 'Birth State', and 'Birth Location'. The 'Biographical History' section includes fields for 'Effective Date', 'Gender' (Unknown), 'Highest Education Level' (A-Not Indicated), 'Marital Status' (Single), 'Language Code', and 'Alternate ID'. At the bottom, there is a table for 'National ID' with columns for Country, National ID Type, National ID, and Primary ID. The 'Edit Name' dialog box is open, showing fields for 'Prefix', 'First Name' (Jonathon), 'Middle Name' (G.), 'Last Name' (Napolitano), and 'Suffix'. The 'Display Name' field is also visible, along with 'Formal Name' and 'Name' fields. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

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](#) | [Organizational Relationships](#)

Person ID: NEW

Primary Name Find | View All First 1 of 1 Last

*Effective Date: 08/01/2010

*Format Type: English

Display Name: **Napolitano, Jonathon G.** [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: **Male**

*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	777-88-9999	<input checked="" type="checkbox"/>

Save Notify Previous tab Next tab Update/Display Include History Correct History

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="checkbox"/>

Email Addresses Customize | Find | View All First 1 of 1 Last

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

Save Notify Previous tab Next tab Update/Display Include History Correct History

9. Address History page displays

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

Address History Find First 1 of 1 Last

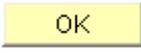
Address Type: Home

*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

Edit Address

Country: United States

Address 1:

Address 2:

City: State: Colorado Postal:

County:

11. Contact Information page re-displays

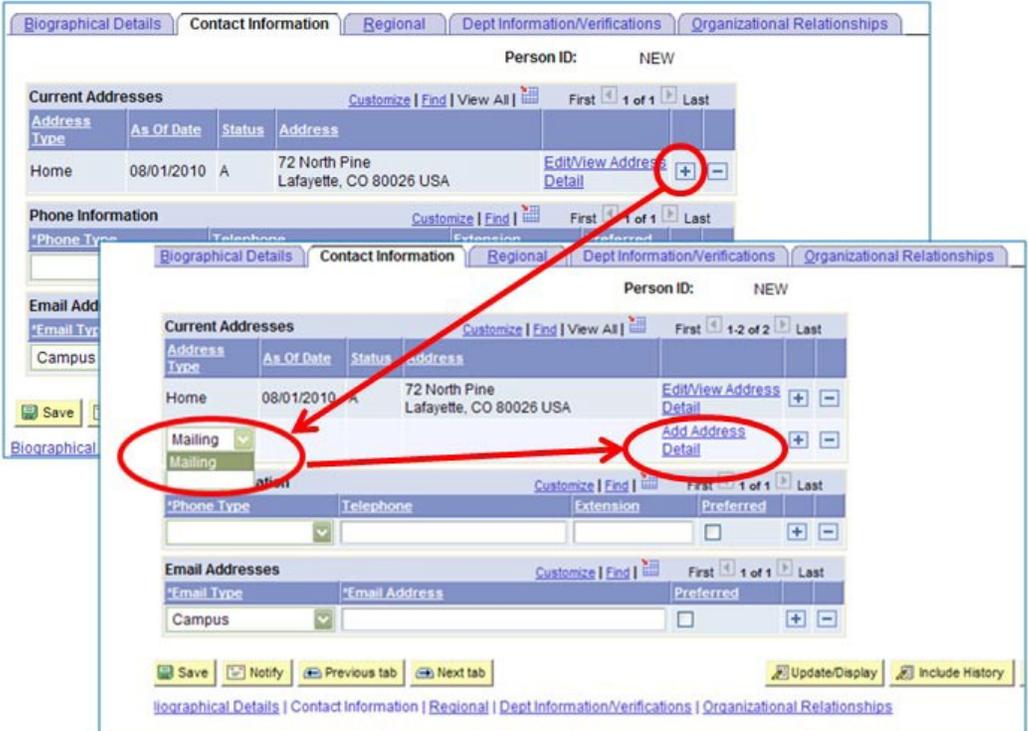
- If Mailing address is different than Home address, click + by [Edit/View Address Detail](#)   to add a record.

- 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



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	Edit/View Address Detail	 

Phone Information

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

Person ID: NEW

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

Phone Information

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

Person ID: NEW

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

Email Addresses

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

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

- Click

Regional

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	A	72 North Pine Lafayette, CO 80026 USA	Edit/View Address Detail + -

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

*Phone Type	Telephone	Extension	Preferred	
Campus 1	303/333-9999		<input checked="" type="checkbox"/>	+ -

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

*Email Type	*Email Address	Preferred	
Campus	mary.weather@cusys.edu	<input checked="" type="checkbox"/>	+ -

Save Notify Previous tab Next tab Update/Display Include 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 +

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	

Save Notify Previous tab Next tab

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

Look Up Ethnic Group

SetID: USA

Ethnic Group: begins with

Description: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1-7 of 7 Last

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

- 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](#)

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): Eligible to Work in U.S. Citizenship (Proof 2):
Active Reserve
Disabled Vet
Disabled Vietnam Era Vet
Inactive Reserve
No Military Service
Not Indicated
Other Protected Veteran
Retired Military
Vietnam Era Veteran

Smoker History
Smoker As of
1 Yes

Save Notify Previous tab Next tab Update/Display Include History Correct History

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

13. Dept Information/ Verifications page displays

- Home Department and Campus Box are required.

Person ID: NEW

Effective Date: 08/01/2010 Privacy Flag FERPA
Home Department: 51000 Payroll & Benefit Services
Campus Box: 575 SYS Payroll & Benefit Services

Save Notify Previous tab Next tab Update/Display Include History Correct History

Employment Eligibility Proof
Soc. Sec. Card Copy Received
I-9 Effective Date
I-9 Expiration Date
EmplID Name
 EVerify Pass
EVerify Completion Date

Background checks
 Criminal History Records
 Financial History Records
 Motor Vehicle Records
 Other Background Check

Save Notify Previous tab Next tab Update/Display Include History Correct History

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

- Click

[Organizational Relationships](#)

14. Organizational Relationships page displays

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

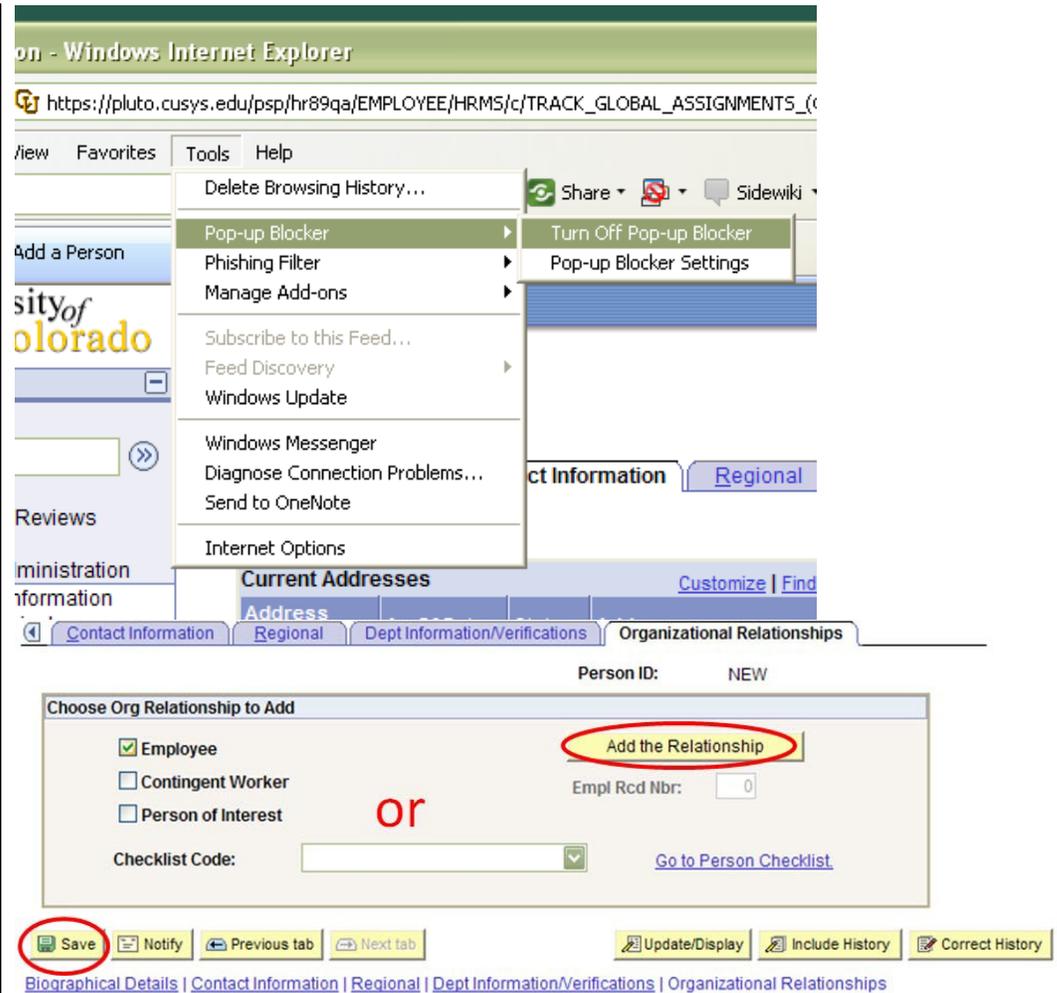
- Go to Internet

'Tools'

- Select 'Pop-up Blocker'
- Select 'Turn Off Pop-up Blocker'

- Check Employee box

- Click  or 



Internet Explorer - Windows Internet Explorer

Address bar: https://pluto.cusys.edu/psp/hr89qa/EMPLOYEE/HRMS/c/TRACK_GLOBAL_ASSIGNMENTS_(

Tools menu:

- Delete Browsing History...
- Pop-up Blocker
 - Turn Off Pop-up Blocker
 - Pop-up Blocker Settings
- Phishing Filter
- Manage Add-ons
- Subscribe to this Feed...
- Feed Discovery
- Windows Update
- Windows Messenger
- Diagnose Connection Problems...
- Send to OneNote
- Internet Options

Form: Choose Org Relationship to Add

Employee
 Contingent Worker
 Person of Interest

or

Add the Relationship

Empl Rcd Nbr:

Checklist Code:

[Go to Person Checklist](#)

Buttons:  Save,  Notify,  Previous tab,  Next tab,  Update/Display,  Include History,  Correct History

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

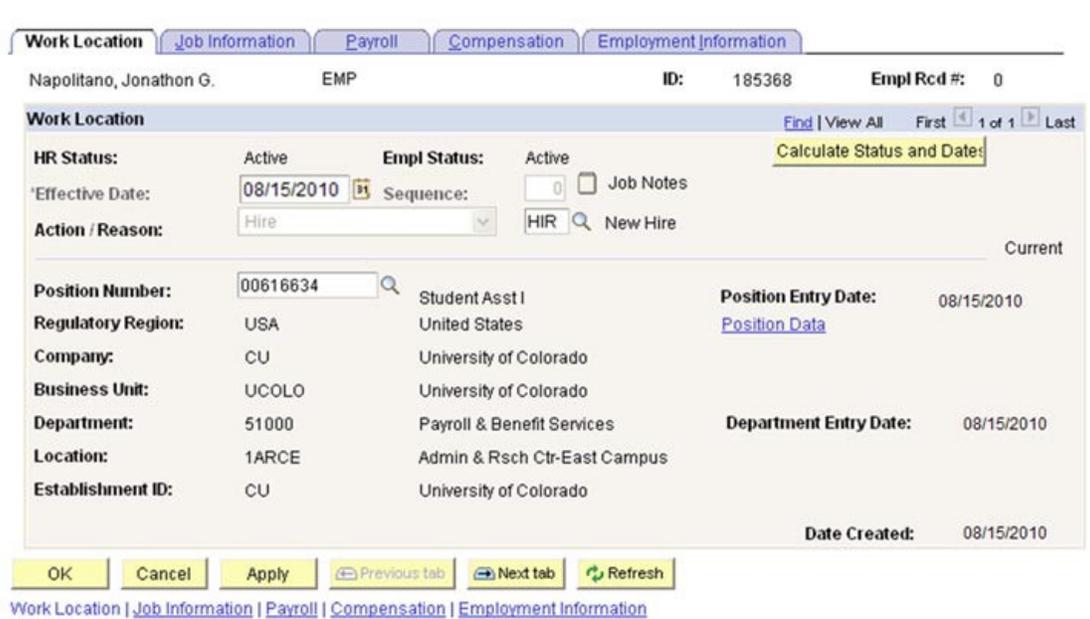
15. Work Location page displays

- Enter date of hire
- **Hire** action defaults
- Enter Reason for the hire (click  to search)

- Enter Position Number *

- Click  to enter Job Notes on any page

- Click [Job Information](#)



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

Napolitano, Jonathon G. EMP ID: 185368 Empl Rcd #: 0

Work Location [Find](#) | [View All](#) | First 1 of 1 Last

HR Status: Active **Empl Status:** Active [Calculate Status and Dates](#)
'Effective Date: 08/15/2010 **Sequence:** 0 Job Notes
Action / Reason: Hire HIR New Hire

Position Number: 00616634 Student Asst I **Position Entry Date:** 08/15/2010
Regulatory Region: USA United States [Position Data](#)
Company: CU University of Colorado
Business Unit: UCOLO University of Colorado
Department: 51000 Payroll & Benefit Services **Department Entry Date:** 08/15/2010
Location: 1ARCE Admin & Rsch Ctr-East Campus
Establishment ID: CU University of Colorado

Date Created: 08/15/2010

Buttons:  OK,  Cancel,  Apply,  Previous tab,  Next tab,  Refresh

Navigation: [Work Location](#) | [Job Information](#) | [Payroll](#) | [Compensation](#) | [Employment Information](#)

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. Job Information page displays

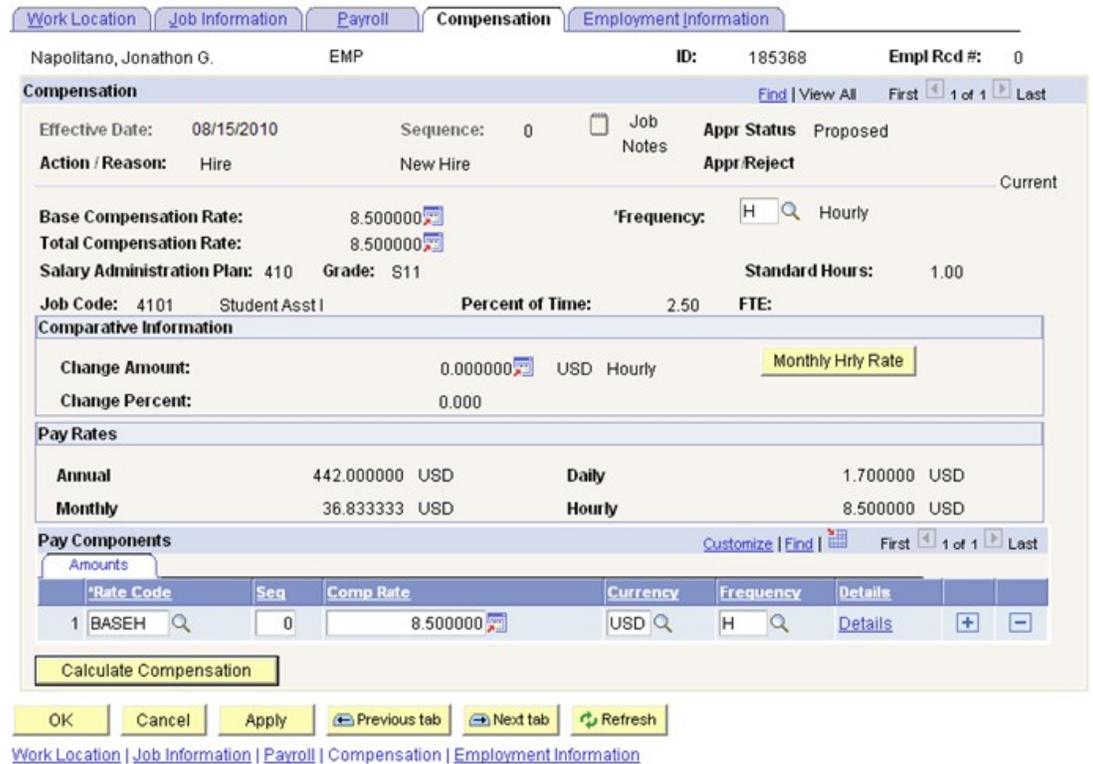
- Click  to search for appropriate Empl Class
- Percent of Time and Standard Hours default from position data and can be updated. A change to either one updates the other
- Click 

17. Payroll page displays

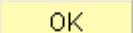
- All fields default
- Tax Location Code and FICA Status default from job code and location code. Update if needed, but system will set the final FICA Status
- Click 

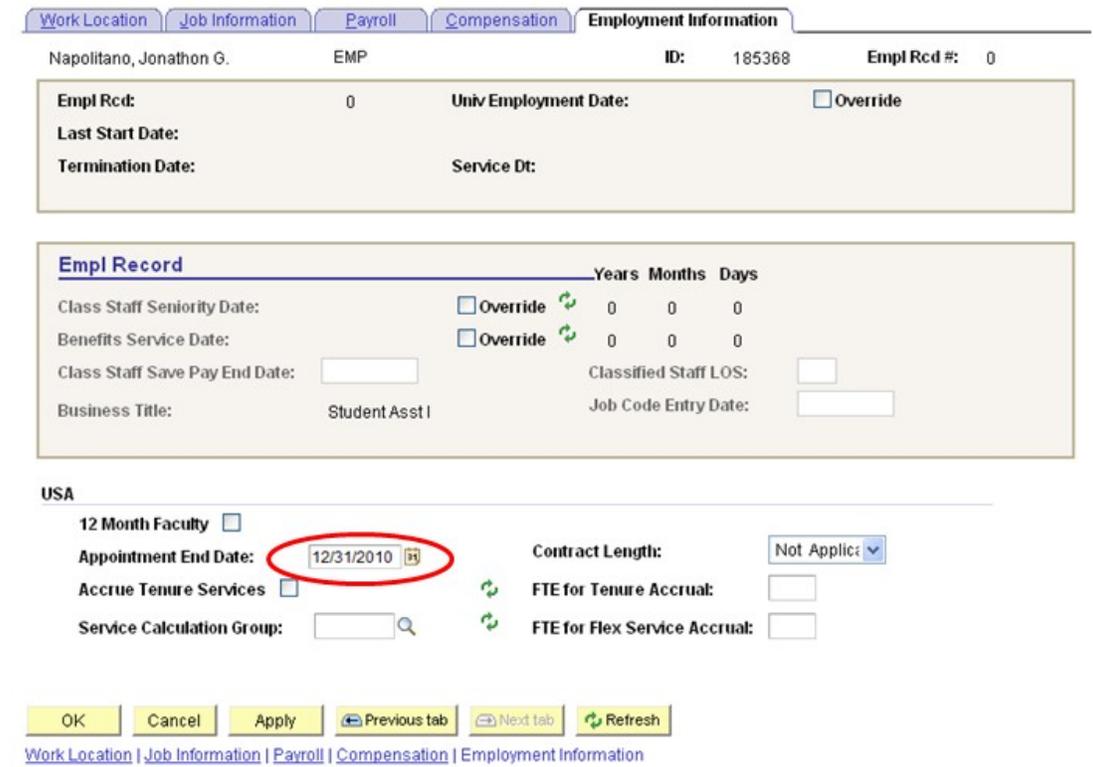
18. Compensation page displays

- Frequency: Verify that H (hourly) has defaulted
- In Pay Components section:
 - Enter hourly Rate Code of BASEH
 - Enter hourly Comp Rate
- Click 
- Click 



19. Employment Information page displays

- Enter Appointment End Date (required for student employees)
- Review your work
- Click  or 
- 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.

20. Emergency Contact page displays

- Enter Contact Name & Relationship to Employee
- Identify Primary Contact by clicking
- If contact has same address and/or phone as employee, check those boxes
- If contact has other address, click [Edit Address](#)
- Click to insert row(s) to include additional Emergency Contact(s)
- Additional phone numbers can be entered on Other Phone Numbers page
- Review data
- Click

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

Napolitano, Jonathon G. **EmpId:** 185368

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

*Contact Name:

*Relationship to Employee: **Primary Contact**

Same Address as Employee **Address Type:**

[Return to Personal Data](#) Same Phone as Employee

Employee's Current Address

Country:	USA	United States
Address:	789 Holly Street Louisville, CO 80027	

Contact Phone

Phone:	<input type="text" value="303/000-0000"/>
---------------	---

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

Hire Student Hourly or Work Study complete