TEMPLATE-BASED HIRE INSTRUCTIONS - HR PREPARERS

TEMPLATE: CLASS9_FELLOWS

Template-Based Hire (TBH) in the HCM system provides HR Preparers with an electronic way to submit information about a new hire to the HCM Unit, Academic Labor Relations, or directly to the HCM database for processing. The TBH process utilizes pre-established templates that are aligned with particular employee types.

Groundwork:

Prior to starting a TBH in the system, Preparers should:

A. Have a copy of the official Offer Letter because information from it is needed in order to complete a TBH. Offer letters must be on the department's letterhead and should contain:

   - Appointment Start Date
   - Appointment End Date (if applicable)
   - Job Code
   - Job Title
   - Compensation Amount
   - Hiring Authority's Signature
   - Short Description of Job Duties

   Note: *Letter requirements vary by type of appointment and the nature of the work to be performed. Additional information may be required.*

B. Have the following Visa information if the employee is not a US Citizen:

   - Country of Residence
   - Visa/Permit Type
   - Date of Entry into Country
   - Visa/Permit Status
   - Status Date
   - Status Expiration Date

C. Perform a Global Search to determine if an individual already exists in the system. If so, then a different type of transaction (e.g., Transfer, Reappointment, etc.) may be necessary.

   Note: If the Global Search reveals the employee is already in the system and you are not sure how to proceed, please contact your HCM Specialist for guidance.

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System Guidelines:

Templates – A variety of templates are available. Preparers should be sure to select the template that matches the job class and subcategory, if applicable.

Required Fields – All fields in the templates marked with an asterisk (*) are required and must be completed before the transaction can be submitted. In addition, at least one phone number is required on the "**Personal Information**" tab, even though the phone fields are not marked with an asterisk.

System Icons – The following icons are available to assist Preparers with entering information:

Icon	Action
	Choose a date from the calendar.
	Look up or search for a value.
	Select a value from a drop-down list.

System Messages – Preparers should read all system messages presented while entering data into a TBH template because the content will help guide them to successful completion.

Comments Field – Preparers and Approvers can use the "**Comments**" field to share important information about a particular hire transaction with each other. If text has been entered into this field by someone else, then users should be careful not to overwrite it.

Save for Later – Preparers can exit out of a TBH template and go back to it later using the "**Save for Later**" button. Preparers can navigate back to the "**Hires in Process**" screen to locate and finish it. Navigation: Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire.

Visa/Citizenship Tab – This information is required. It is used to tax the employee appropriately and enables Payroll Services to be in compliance with Federal tax laws and treaties. If an employee is a U.S. Citizen, select "**Yes**" from the drop-down list. Other citizenship information is automatically populated after the selection. If the employee is not a U.S. Citizen, select "**No**" and fill in the additional required fields (e.g., Country of Residence, Visa/Permit Type, etc.).

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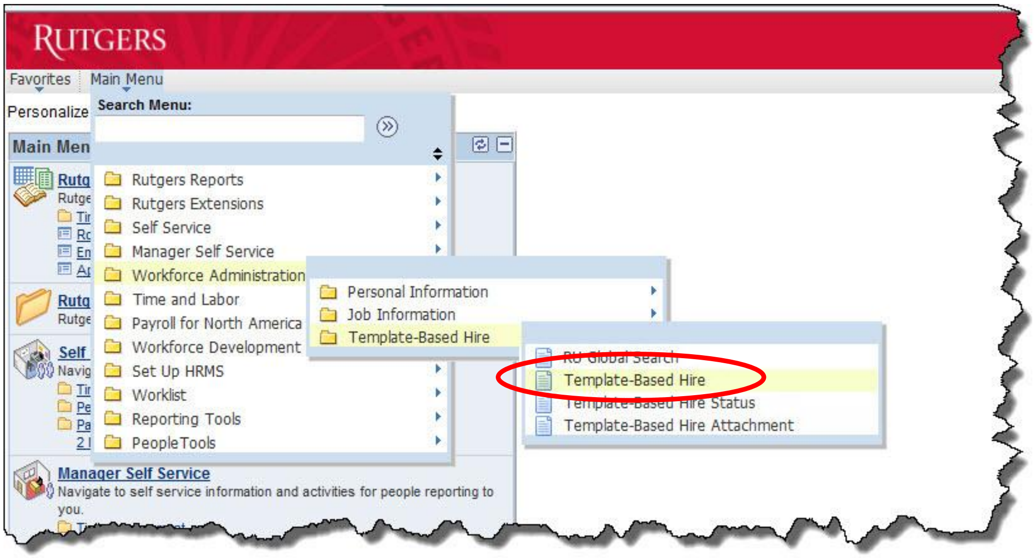
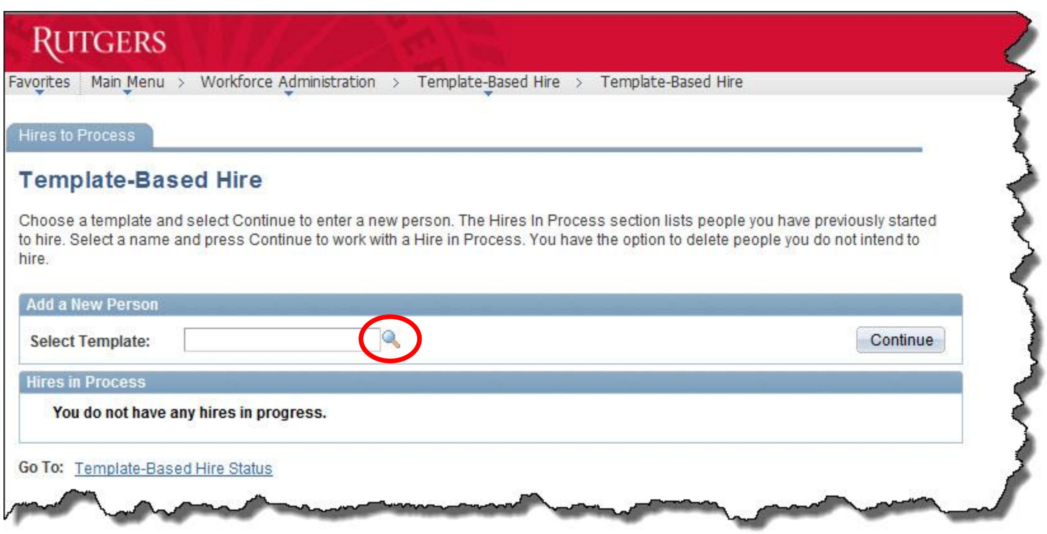
Step-by-Step Instructions:

Navigation:

Main Menu > **Workforce Administration** > **Template-Based Hire** > **Template-Based Hire**



Step 1: Click on the “ ” icon next to the “**Select Template**” field.



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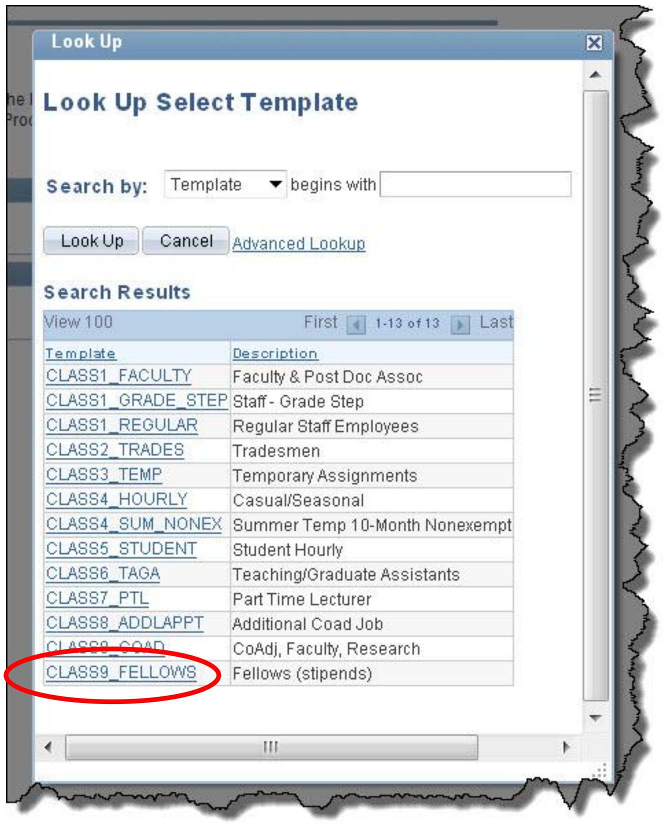
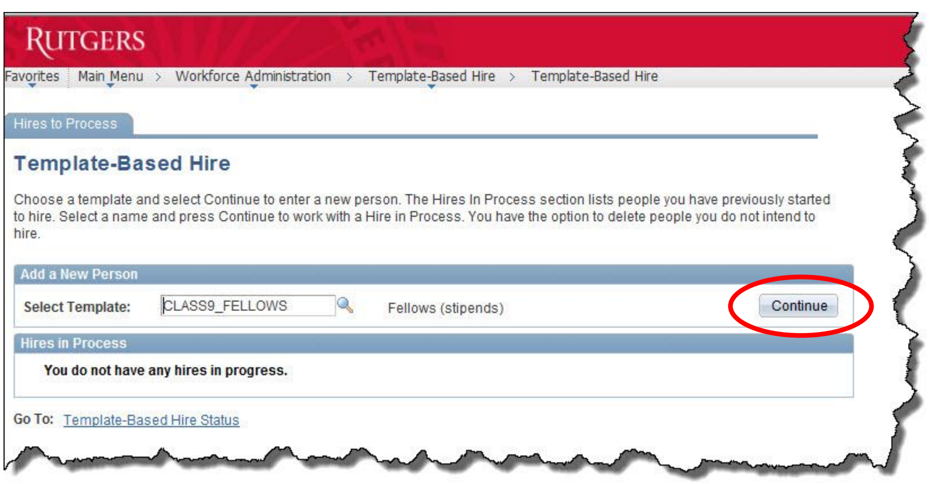
Step 2: Scroll to the bottom of the "**Look Up Select Template**" list and click on the "**CLASS9_FELLOWS**" link in the "**Template**" column.



Step 3: Click on the "**Continue**" button.



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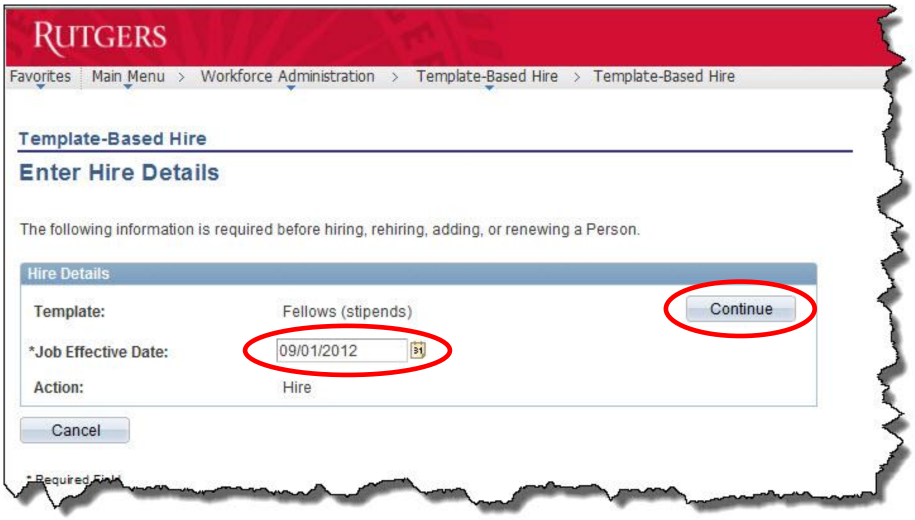
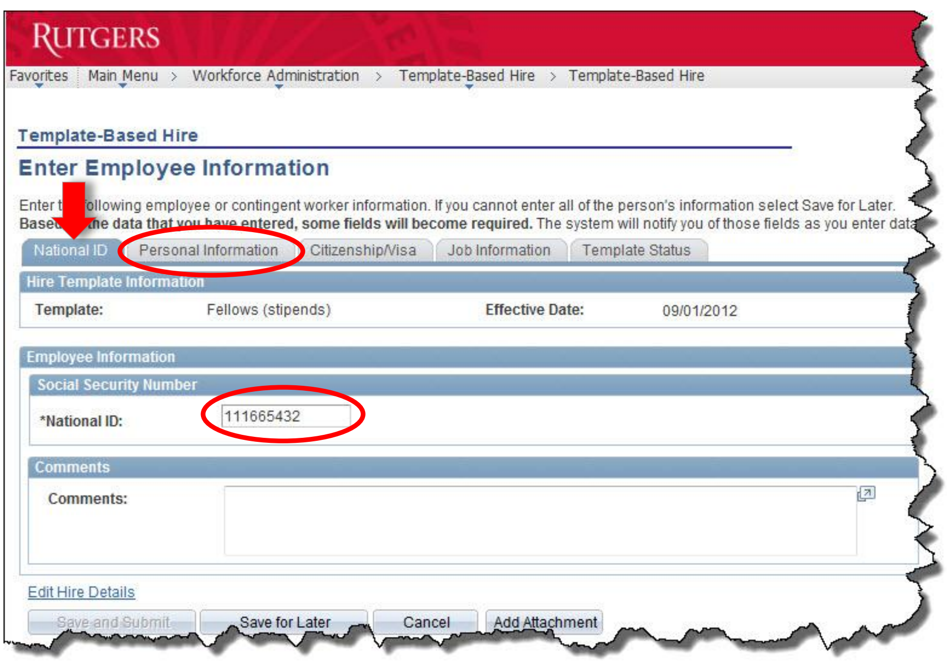
Step 4: Click in the field next to "**Job Effective Date**" and type the hire date into the field using MM/DD/YYYY format, or click on the " " icon and choose a date from the calendar. Make sure the date entered matches the start date noted in the Offer Letter, then click on the "**Continue**" button.



Step 5: Type the employee's Social Security Number into the "**National ID**" field, then click on the "**Personal Information**" tab.



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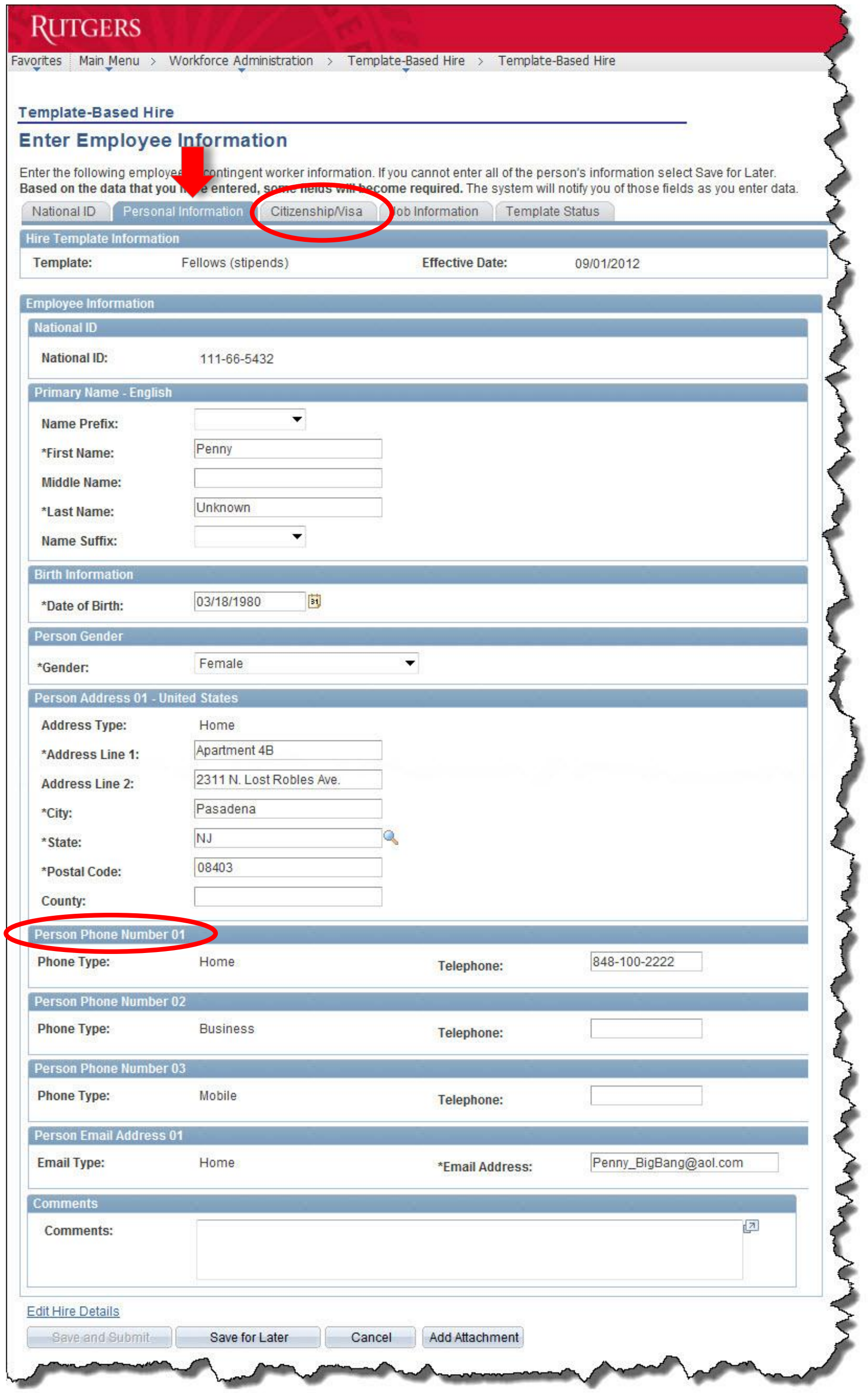
Step 6: Enter information into the fields on the "**Personal Information**" tab. When finished, click on the "**Citizenship/Visa**" tab.

*<u>Note:</u> Fields marked with an asterisk (*) must be populated. In addition, at least one phone number must be entered into one of the "**Person Phone Number**" fields even though none are marked with an asterisk.*



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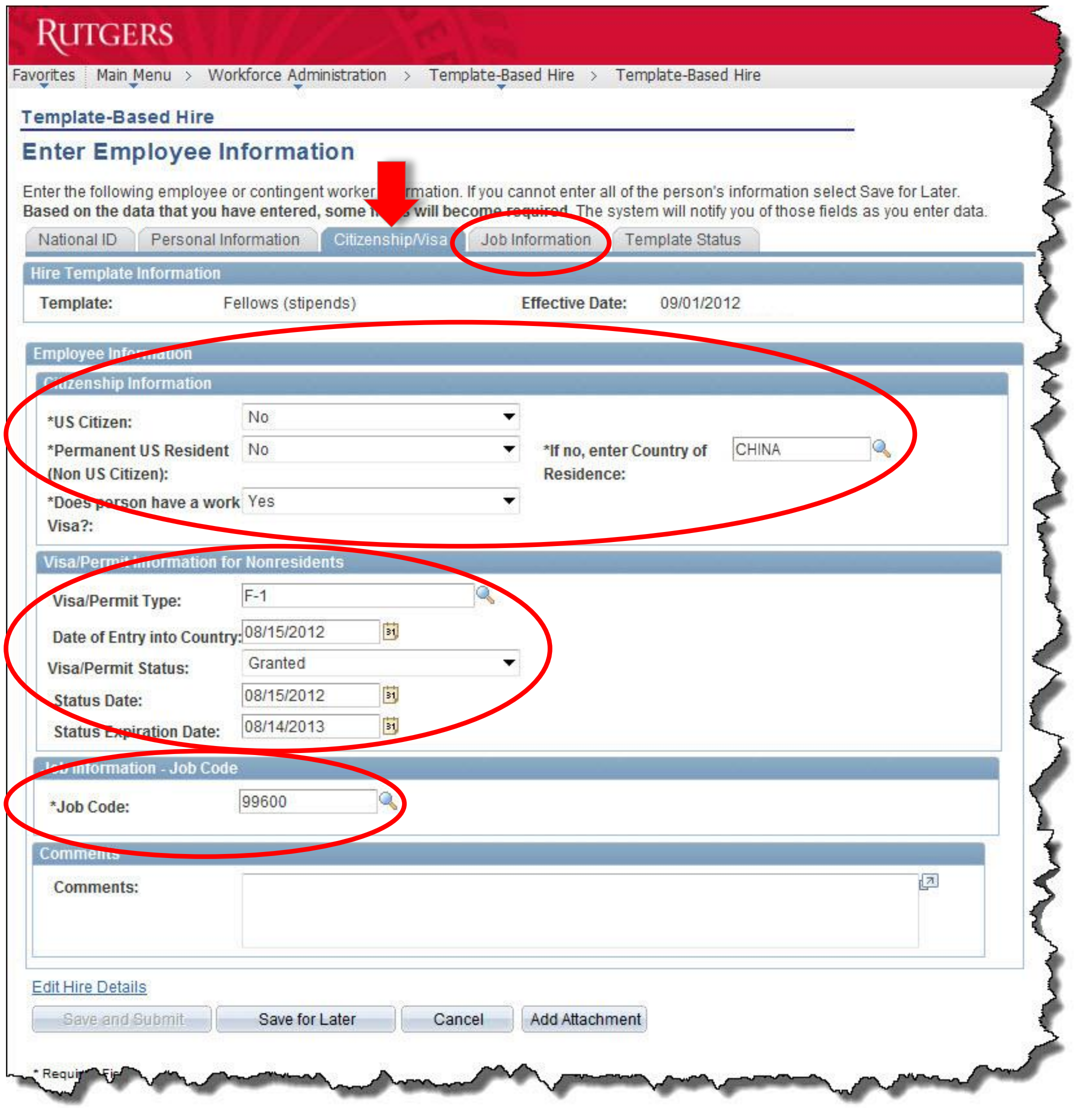
Step 7: Enter information into the fields on the "**Citizenship/Visa**" tab. Click in the "**US Citizen**" field and select "**Yes**" or "**No**" from the list. Some fields will populate automatically if "**Yes**" is selected. If the employee is not a US Citizen, then select "**No**" and enter the additional required information in the "**Citizenship Information**" and "**Visa/Permit Information for Nonresidents**" sections.

Click on the " 🔍" icon next to the "**Job Code**" field and select the code from the list that matches the one stated in the Offer Letter. When finished, click on the "**Job Information**" tab.



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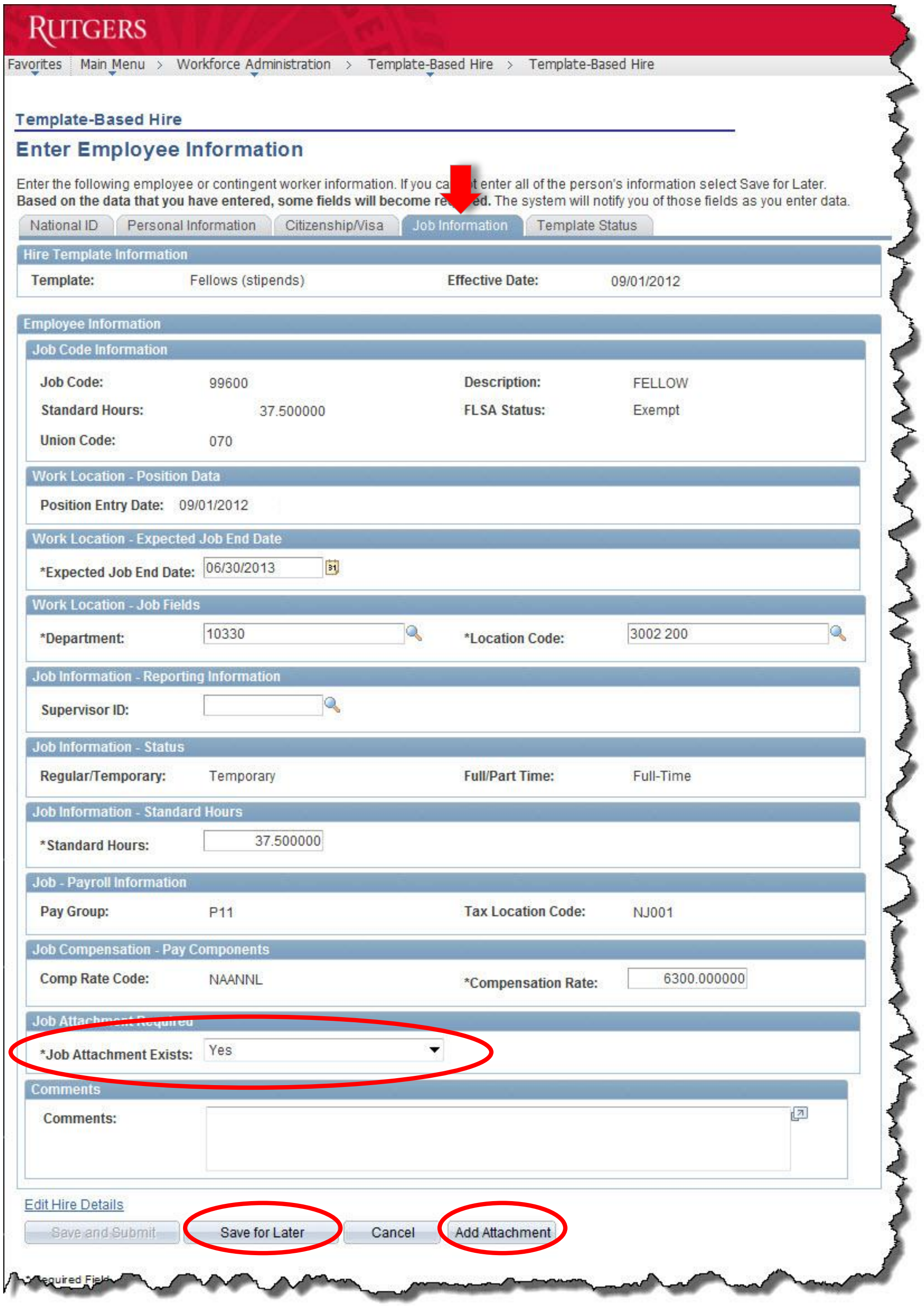
Step 8: Enter information into the fields on the "**Job Information**" tab. If you have a copy of the Offer Letter, select "**Yes**" from the drop-down list next to the "**Job Attachment Exists**" field. When finished, click on the "**Add Attachment**" button.

Note: *If you do not have a copy of the Offer Letter, select "**No**" from the "**Job Attachment Exists**" list and click on the "**Save for Later**" button.*



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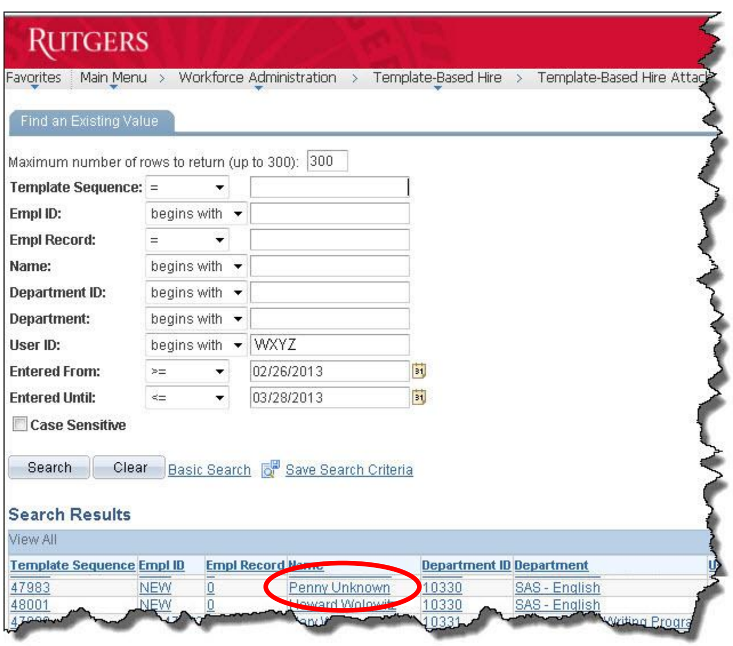
Step 9: On the "**Job Offer Attachment**" screen, click on the "**Search**" button. Data for the employees entered today back to approximately one month ago will appear in the "**Search Results**" area. Locate the employee in the "**Search Results**" area and click on the link in the "**Name**" column.

Note: *Be careful to select the correct employee. Also, if you need to, you can change the dates in the "**Entered From**" and "**Entered Until**" fields to narrow or expand the date range of the search.*



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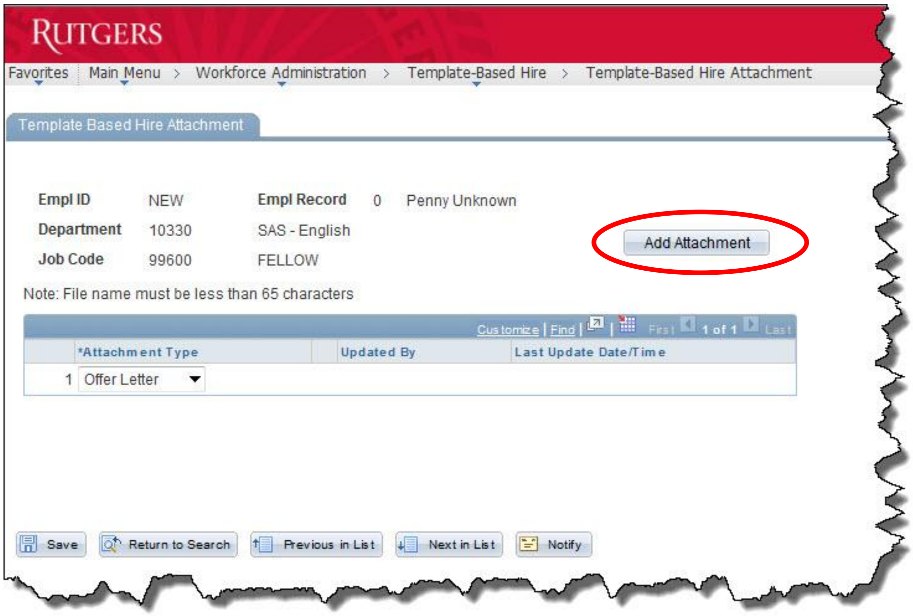
Step 10: Click on the "**Add Attachment**" button on the "**Template Based Hire Attachment**" screen. A "**File Attachment**" window will open.



Step 11: Click on the "**Browse**" button, locate the Offer Letter on your computer and click on the file name to select it. When finished, click on the "**Upload**" button.

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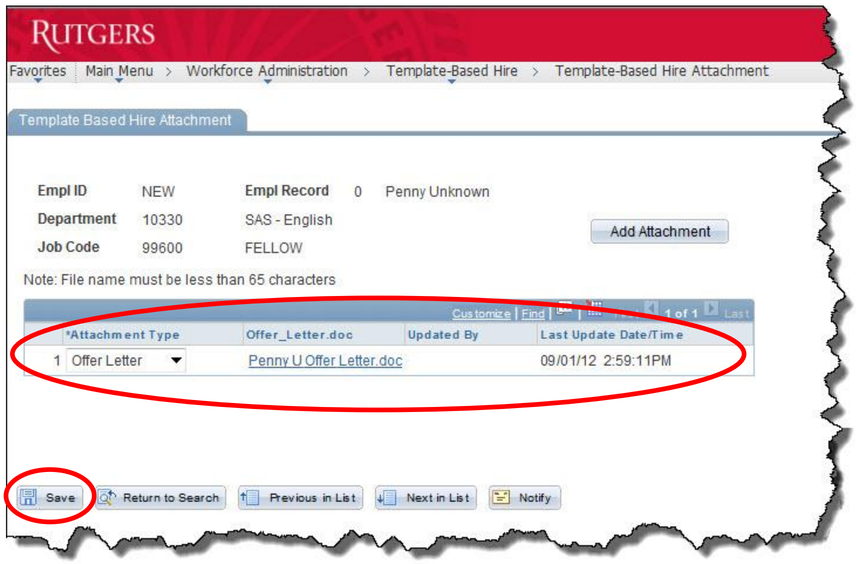
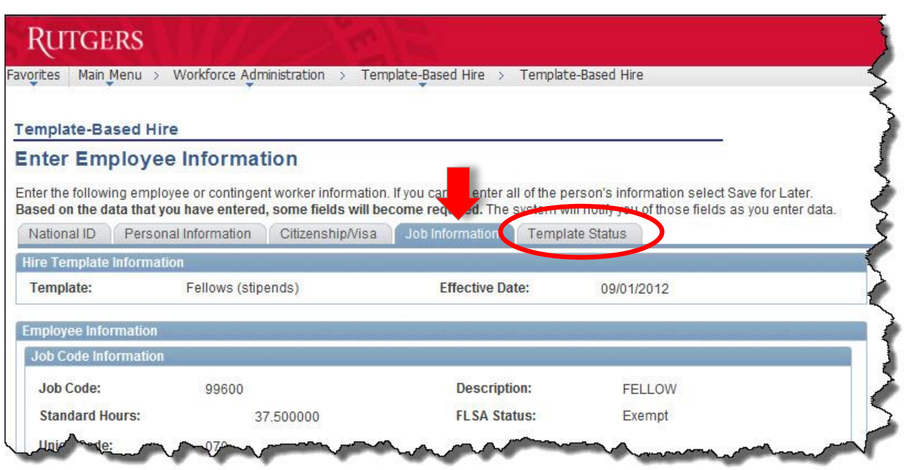
Step 12: The name of the document you uploaded displays in the "**Offer_Letter.doc**" column. The date and time you uploaded it also appears in the "**Last Update Date/Time**" column. Make sure "**Offer Letter**" appears in the "**Attachment Type**" column. If not, click on the " " icon and select it. When finished, click on the "**Save**" button.



Step 13: Click on the " " in the top right corner of the "**Template Based Hire Attachment**" window to close it. After the attachment window is closed, you will see the "**Job Information**" tab of the Template-Based Hire "**Enter Employee Information**" screen.

Note: *Make sure you only close the attachment window. Do not close the Template-Based Hire screen with the "**Enter Employee Information**" tabs.*

Step 14: Click on the "**Template Status**" tab.



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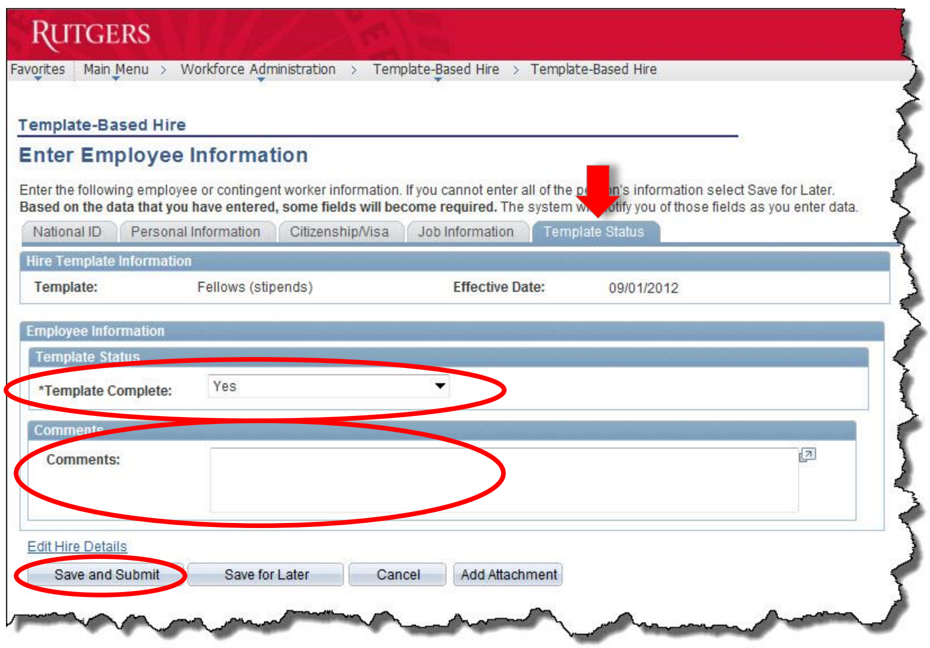
Step 15: Click on the “ ” next to the “**Template Complete**” field and select “**Yes**” from the list. This makes the “**Save and Submit**” button active.

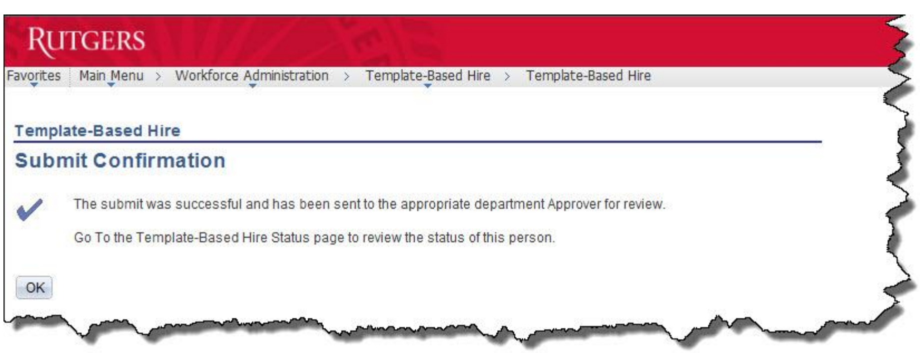
If needed, click in the box next to “**Comments**” and type notes for the Approver. If comments already exist, make sure you do not overwrite them. The Approver will be able to read and respond to the comments later.

Click on the “**Save and Submit**” button to submit the transaction.

Note: *The system will prompt you if data is missing or needs correction. If this happens, make the appropriate changes and click on the “**Save and Submit**” button until all data is validated and the system submits the transaction.*



Step 16: A “**Submit Confirmation**” screen appears.



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Workflow & Next Steps:

Once submitted, the system:

- Routes the hire request to the department Approver.
- Sends a hire notification email to the Approver with instructions on next steps.
- Copies the Preparer on the email to the Approver.

Upon receipt of the email, the department Approver:

- Navigates to the hire request.
- Reviews the data entered by the Preparer.
- Approves the transaction, if the data is accurate and complete.
  OR
- Positions cursor underneath any existing notes in the "**Comments**" field – to ensure they are not overwritten – and types instructions for the Preparer about necessary changes into the field.
- Routes the hire transaction back through the system to the Preparer for corrections.

If changes are required, then the Preparer:

- Makes the changes.
- Positions cursor underneath any existing notes in the "**Comments**" field – to ensure they are not overwritten – and types additional comments into the field for the Approver about the changes made.
- Selects the blank in the "**Template Complete**" drop-down list to reset the value to "**Yes**" and reactivate the "**Save and Submit**" button.
- Clicks on the "**Save and Submit**" button to send the hire transaction back to the Approver for review.

Once approved by the department Approver, the system automatically routes the hire transaction to the HCM Unit, Academic Labor Relations, or directly to the HCM database for processing.

After the TBH is processed, the system automatically sends a workflow email to the Approver to review and adjust the commitment accounting, if necessary.