

# **HCM**

# **Template-Based Hire**

# **Process Overview Session**

**Version 1.4**

**08/14/2013**

## Format and Topics

### Part I – Process Overview:

- Background Information
- New Hire Templates & Primary Differences
- Transaction Requirements
- Process Roles & Workflows

### Part II – HCM Template-Based Hire Submission:

- Basic System Navigation
- Step-by-Step Instructions for Preparers
- Step-by-Step Instructions for Approvers
- Live demonstration (Preparer and Approver Roles)
- Additional Resources
- Questions & Answers

## **Part I - Overview**

- **Background Information**
- **New Hire Templates & Differences**
- **Requirements**
- **Roles & Workflows**

## What is HCM?

HCM stands for Human Capital Management. It also refers to a software application that is part of the Rutgers Integrated Administrative System (RIAS), which is a suite of software applications that work together to manage administrative data and processes for the University.

The HCM application is a customized version of Oracle's PeopleSoft product. It supports human resource, payroll, time entry, time approval, and commitment accounting activities.



## HCM Unit in UHR

The HCM Unit in University Human Resources (UHR) implements department-initiated employee transactions and university-wide mass salary changes using the RIAS HCM application. The Unit's goal is to ensure all employee data changes are accurate and compliant with state and federal regulations, university policy, and bargaining unit contracts. The area works closely with departmental HCM Preparers and Approvers, as well as with other areas of UHR, the Office of Academic Labor Relations (ALR), Payroll Services, and RIAS.

**Note:** This presentation focuses on HCM Template-Based Hire (TBH) transactions. Information about commitment accounting activities that happen after a TBH is completed is not included.

## What is a Hire Transaction?

When an individual is hired to work at Rutgers, information about the person and the job must be entered into HCM to support that person's employment. This is called a Hire transaction.

### Types of Hires

1. New Hire - First time an employee works for Rutgers.
2. Hire - Employee who already works at Rutgers takes an additional assignment at the University.
3. Rehire - Former employee returns after a break in service.

**Note:** Department Preparers enter all three types into HCM system using the Template-Based Hire process.

## What is a Template-Base Hire?

Template-Based Hire (TBH) in the HCM system is an electronic process that allows department Preparers to enter and submit data into HCM to hire a new employee (New Hire) or add another assignment to an existing employee's record in the system.

Information about the employee and the job are entered into a template that has been customized for a particular type of position.

The data entered into the template is routed to, reviewed, and approved by the department HR Approver and, once approved, submitted to the HCM Unit, Academic Labor Relations (ALR), or directly to the HCM database for processing.

## New Hire Templates

The following templates are currently available in HCM:

<b>Template Name</b>	<b>Description</b>
<b>CLASS1_FACULTY</b>	<b>Faculty &amp; Post Doc Associates</b>
<b>CLASS1_GRADE_STEP</b>	<b>Staff – Grade Step</b>
<b>CLASS1_REGULAR</b>	<b>Regular Staff Employees</b>
<b>CLASS2_TRADES</b>	<b>Tradesmen</b>
<b>CLASS3_TEMP</b>	<b>Temporary Assignments</b>
<b>CLASS4_HOURLY</b>	<b>Casual/Seasonal</b>
<b>CLASS4_SUM NONEX</b>	<b>Summer Temp 10-Month Nonexempt</b>
<b>CLASS5_STUDENT</b>	<b>Student Hourly</b>
<b>CLASS6_TAGA</b>	<b>Teaching/Graduate Assistants</b>
<b>CLASS7_PTL</b>	<b>Part Time Lecturer</b>
<b>CLASS8_ADDLAPPT</b>	<b>Additional Coadjutant Job</b>
<b>CLASS8_COAD</b>	<b>Coadjutant, Faculty, Research</b>
<b>CLASS9_FELLOWS</b>	<b>Fellows (Stipends)</b>

**Note:** Be sure to select the template that matches the job.

## Primary Differences

Templates take into account standards associated with particular Employee Classes and subcategories, including:

1. Standard Hours - Maximum full-time hours per week differ based on the job (e.g., 15-hours for Class 6 TA/GA vs. 40 hours for certain Class 1 Range & Step Staff, etc.).
2. Job Codes - The list of available Job Codes is specific to the template associated with a particular position type.
3. Required Fields - Some fields are required on all templates, while others are required based on the type of job being filled (e.g., “Expected Job End Date” is required for some positions and not others).

**Note:** System options, messages and defaulted values are customized to factor in variations in all of the above.

## HCM Template-Based Hire Requirements

In order to submit a TBH, Preparers should have:

1. A signed copy of the Offer Letter that contains the appropriate information.
2. Visa/Citizenship information available if the employee is not a US Citizen.
3. Social Security Number.
4. The employee's name exactly as it appears on Social Security Card or Visa document.
5. The date of birth, home address, telephone number, and email address for the employee.
6. Department/Organization Number for where the employee will work.

## HCM Template-Based Hire Requirements

(continued)

7. Performed a Global Search in HCM to determine if the person is already in the system.

**Note:** If the Global Search reveals the employee is already in the system, then a different type of transaction (e.g., Transfer, Reappointment, etc.) may be required. If you are unsure how to proceed, please contact your HCM Specialist for guidance.

## Hire vs. Other Transactions

Preparers can use the following to help decide whether to enter a hire, reappointment, or transfer in HCM:

### Hire transactions:

- Employee is new (not in HCM at all)
- Employee is “**Terminated**” in HCM
- Employee is “**Active**” in HCM, but this is a new additional assignment or additional dates overlap the current appointment dates

**Note:** If the employee has more than one job, the other appointment(s) must be compatible with the primary job. See the Multiple Assignment Matrix on the HCM Blog: <http://hcmblog.rutgers.edu/>



## Hire vs. Other Transactions

(continued)

### Reappointment transactions:

- Employee's "**HR Status**" is listed as "**Active**" or "**Work Break**"
- Position expired or is about to expire
- Position has a fixed start and end date
- Reappointment job class matches the job class of the previous appointment
- You have an official Reappointment Letter

## Hire vs. Other Transactions

(continued)

### Transfer transactions:

Employee is “**Active**” in HCM and a major change is happening during an appointment, such as:

- Moving from one department to another
- Changing from Academic Year to Calendar Year
- Changing from one job code to a different job code in the same department

## Offer Letter Requirements

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
- Employee's Signature

**Note:** Letter requirements vary by the type of job appointment and the work to be performed.

## Offer Letter Requirements

(continued)

If applicable, letters should also contain:

- Academic or Calendar Year designation
- Term (Fall, Spring, etc.)
- Legal information (e.g., union details)
- Pay begin and end dates, if they are different from appointment start and end dates (applies primarily to non-credit, continuing education courses or workshops)

## Offer Letter Requirements

(continued)

If hiring a Class 6 Academic Year (AY) Teaching Assistant (TA) as a Class 5 Student during the summer, a special memo from the hiring authority must be attached to the Class 5 TBH. The memo must contain:

- Employee's Name
- Employee's ID Number
- Employee's Class 6 Job Title
- Description of Class 5 Job Duties
- Name of Employee's Supervisor During Summer
- Start and End Dates of Class 5 Appointment
- Hourly Rate

## Visa/Citizenship Information

If the employee is not a US Citizen, Preparers will need the following information to complete a TBH:

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

**Note:** Preparers are required to enter and update Visa/Citizenship information in the HCM and Guardian I-9 systems. For additional information, please see the following documents:

TBH Visa/Citizenship - [HCM TBH Visa/Citizenship Doc](#)

Guardian I-9 - [UHR Training Documents](#)

## HCM & I-9 Connection

The HCM TBH process and the Guardian I-9 process are closely related. Each uses a different system, but both are associated with the hiring of employees and require actions along similar timelines.

Citizenship and Visa information entered in the Guardian I-9 system supports federal requirements and helps the University remain compliant with federal regulations regarding an employee's eligibility to work in the United States.

Visa/Citizenship data entered into HCM helps Payroll Services determine taxability and helps UHR identify employees who are not pension eligible.

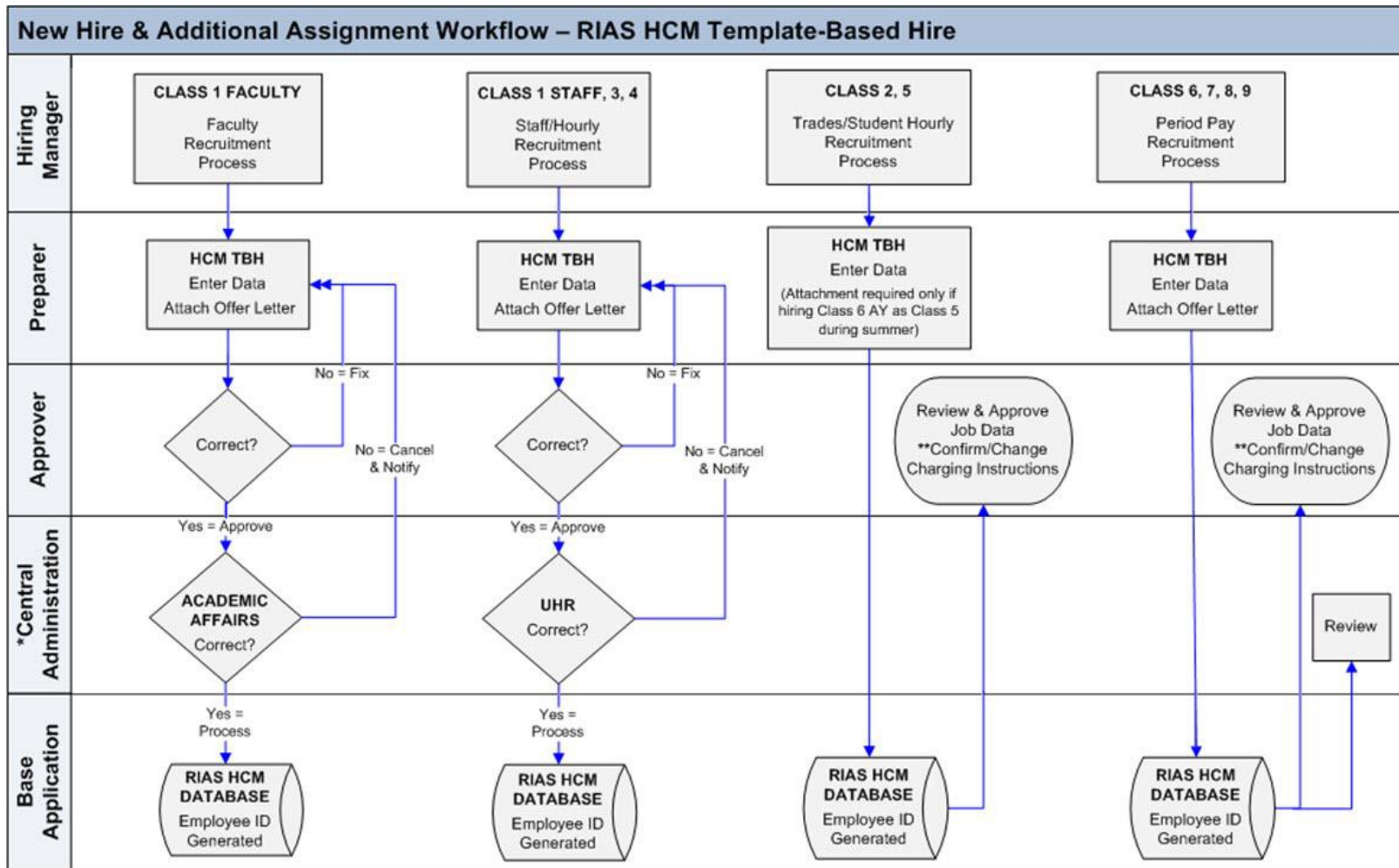
## Roles in HCM TBH Process

Department HR Preparers and Approvers work closely together to submit and approve TBH transactions. They also work with the HCM Specialists in UHR and Academic Labor Relations area to finalize the approved transactions

If you encounter problems before, during, or after a TBH is submitted and this presentation does not answer your questions, please contact the HCM Specialist assigned to your department for assistance. If you are not sure who to contact, see the Department HCM Specialist Assignment document on the HCM Blog for names and contact information:

<http://hcmblog.rutgers.edu/>



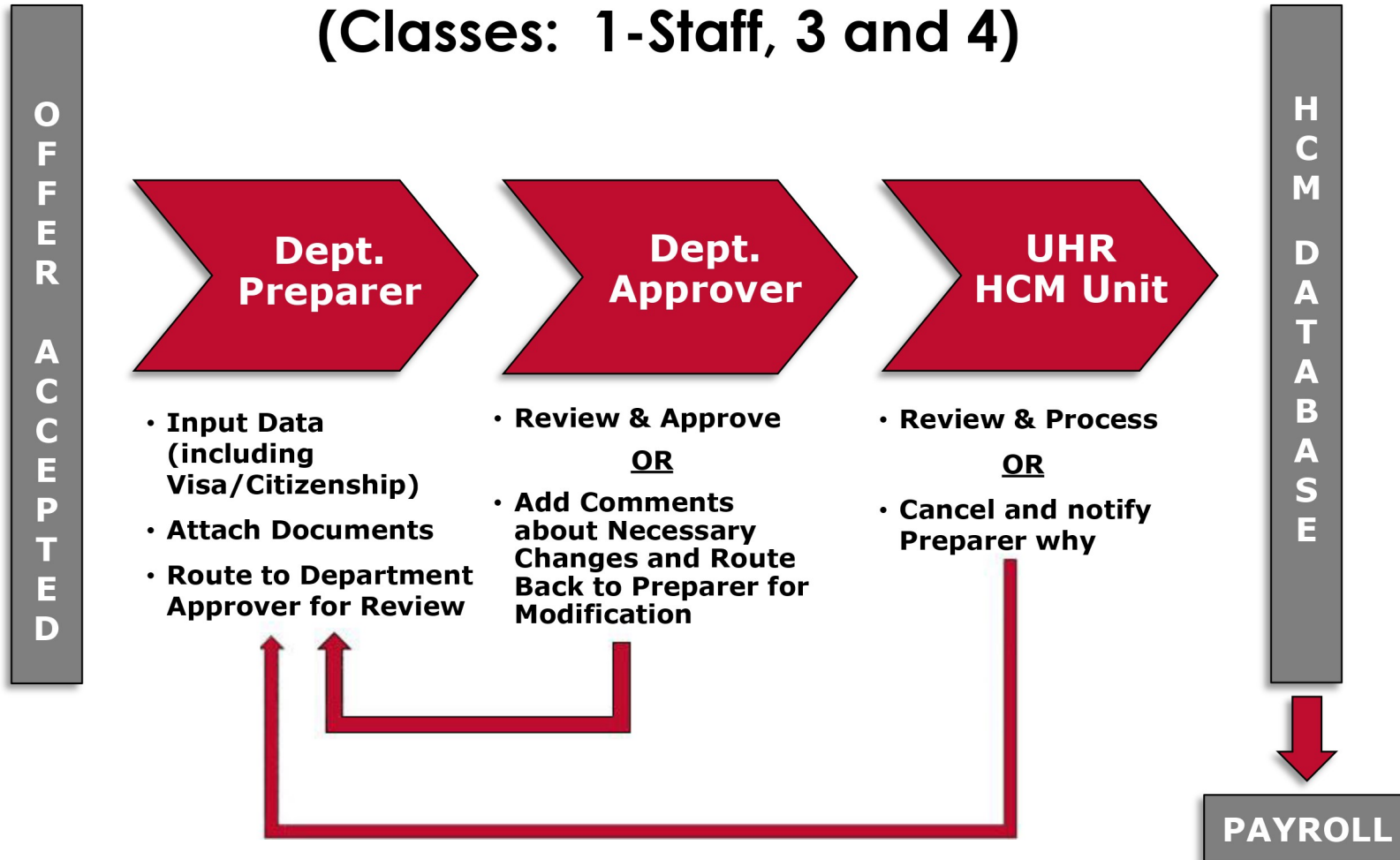


\*Central Administration: Class 1 Faculty positions are processed by Academic Affair; Class 1, 3, and 4 Staff positions are processed by University Human Resources (UHR).

\*\*Confirm/Change Charging Instructions: Please see the RIAS Commitment Accounting User Guide for instructions on how to review and change these.

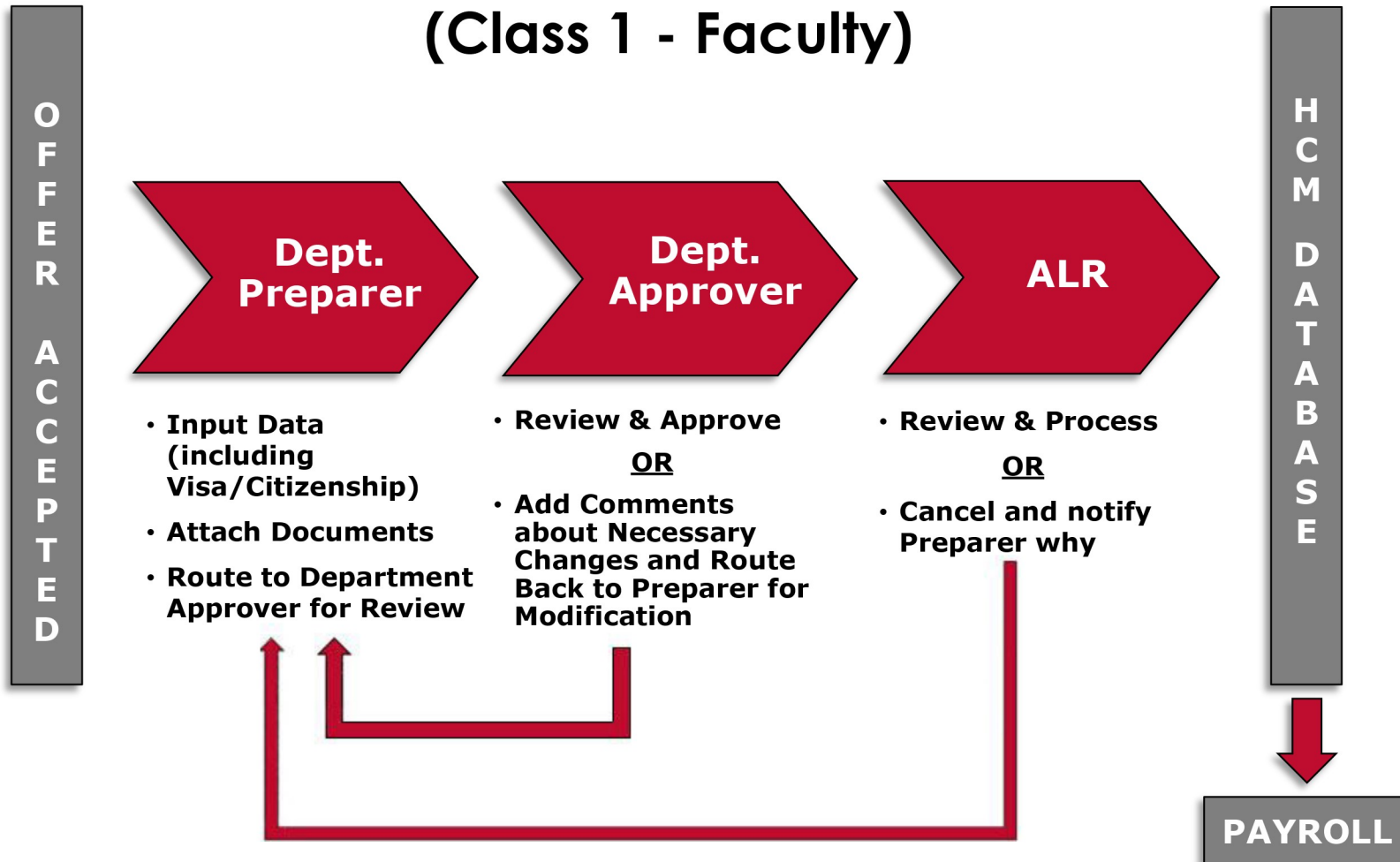
**NOTE:** If you submit a TBH for someone who already exists in the HCM Database, the system automatically routes the TBH to UHR for review and processing.

## HCM TBH Transaction Process - to UHR (Classes: 1-Staff, 3 and 4)



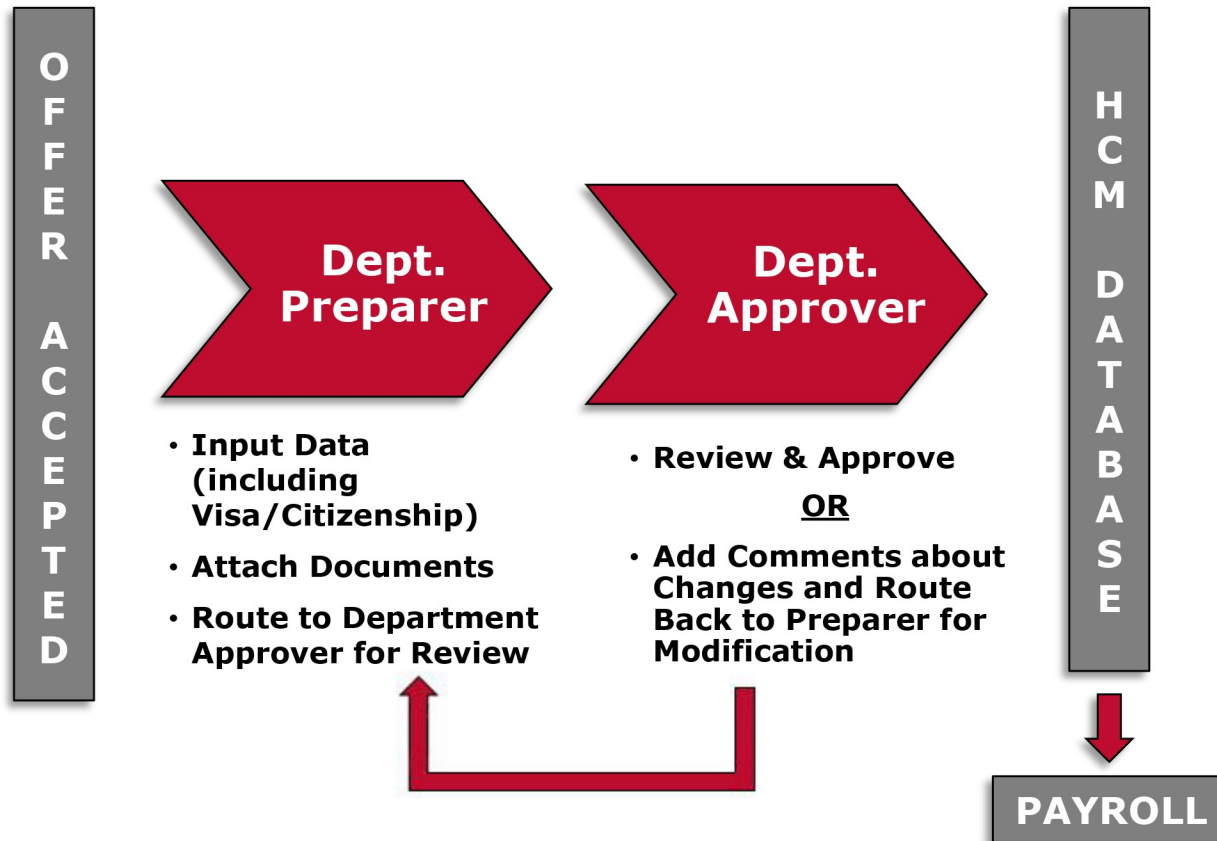
Note: If UHR needs to cancel the transaction, then the Preparer must re-enter it.

## HCM TBH Transaction Process – to ALR (Class 1 - Faculty)



Note: If ALR needs to cancel the transaction, then the Preparer must re-enter it.

## HCM TBH Transaction Process – HCM Database (Classes: 2, 5, 6, 7, 8, and 9)



**Note:** If the employee has a valid SSN and this is the first time working at Rutgers, the approved data goes directly to the database. If not, then the transaction gets automatically routed to UHR for processing.

## Processing Timelines

The timelines for submission and processing of HCM transactions are driven by the HCM Unit's normal and high volume periods. For specific deadlines, check the "**HCM Job Action Schedule**" on the HCM Blog:

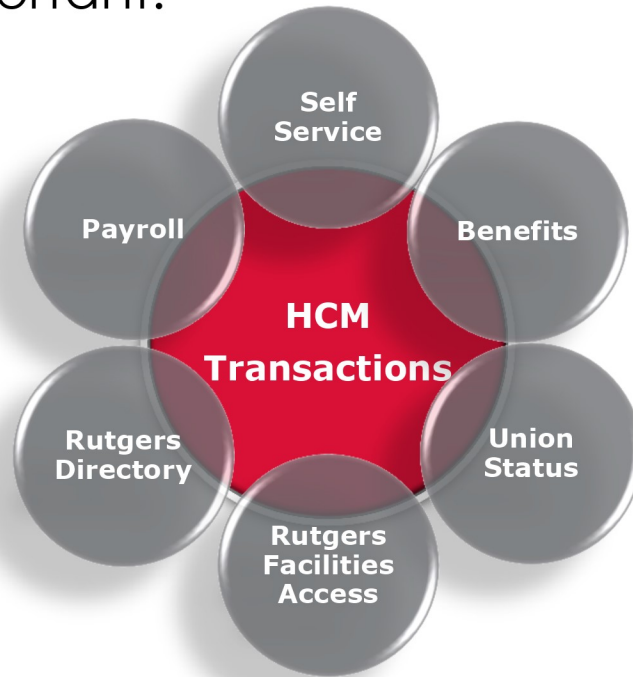
<http://hcmblog.rutgers.edu/>

The schedule includes specific "**No Earlier Than**" and "**No Later Than**" dates that HCM transactions can be submitted. Preparers and Approvers need to adhere to cutoff dates to ensure timely processing of transactions.

**Note:** Submission dates occasionally change due to holidays, mass salary implementations, etc. Schedule changes are communicated via the HCM Blog.

## HCM Data and Other Systems

Data entered into HCM feeds other University systems that impact many areas of an employee's work life. Therefore, accurate and timely submission of transactions is extremely important.





## **Part II – HCM TBH Submission**

- **Basic System Navigation**
- **Instructions for Preparers**
- **Instructions for Approvers**
- **Live Demonstration**
- **Additional Resources**
- **Questions & Answers**

# Basic System Navigation



## RIAS Login

Users must log into RIAS to access the HCM application. To log in, click on the “**RIAS Login**” link on the RIAS website, enter your NetID and password, and then click on the “**LOGIN**” button.

Website: <http://rias.rutgers.edu/>

Link to  
RIAS Login



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CAMDEN | NEWARK | NEW BRUNSWICK | SEARCH RUTGER

# Rutgers Integrated Administrative System

RIAS Home   Learning Resources   FAQs   Contact Us   Forms

- ▶ RIAS Login
- ▶ University Budgeting
- ▶ Purchasing Department
- ▶ University Controller
- ▶ University Human Resources


**Welcome to RIAS...**

Rutgers Integrated Administrative System (RIAS) is a university strategic project designed to address the automation of key administrative functions and to provide employees with the tools help improve and carry out our business processes with the high degree of efficiency and effectiveness. This site serves as the primary communication vehicle to inform the Rutgers community about the ongoing activities of RIAS.

## HCM Application Link

Approved users access the HCM system by clicking on the **"HCM and Payroll Application"** link from the RIAS Gateway screen under the **"HCM Related Applications"** heading.

**Link to HCM System**

		<b>Rutgers Integrated Adminis</b>	
Today's Date: 27-MAR-2012 Last Month Closed: FEB-12 FDW Last Updated: 27-MAR-2012 02:00 AM Current Fiscal Period(s): MAR-12		RIAS is available from 7:00 a.m. Monday to 5:00 p.m. Saturday	
<b>HCM and Payroll</b>			
<b>Self Service</b>		<b>HCM/Payroll New</b>	
<a href="#">W-2 Online Consent</a>		<a href="#">2011 W-2 Statement Now Available</a>	
<a href="#">View W-2</a>		Please remember to keep your Personal Identification Number, up to date in Self Service. A new PIN is available on the left hand side. (Posted 3/27/12)	
<a href="#">Personal Information Summary</a>			
<b>Self Service</b>			
<a href="#">View Paycheck</a>			
<a href="#">Update Direct Deposit Information</a>			
<b>Payroll and Compensation</b>			
<a href="#">Federal W-4 Tax Information</a>			
<a href="#">State W-4 Tax Information</a>		<b>RIAS/HR</b>	
<a href="#">Benefit Summary</a>		If you have questions when using the HCM System, please call the HR Helpdesk at UHR at 848-932-3020 option 6.	
<b>HCM Related Applications</b>		Hours of Operation are 8:30 - 5 pm Monday through Friday <a href="mailto:servicedesk@hr.rutgers.edu">servicedesk@hr.rutgers.edu</a>	
<a href="#">HCM and Payroll Application</a>			
<a href="#">Guardian I-9 System</a>			
<a href="#">Absence Reporting System</a>			
<a href="#">Applicant Tracking System</a>			

# Navigation Basics

## Home Screen

After you click on the “**HCM and Payroll**” link, the system brings you to the Home Screen. What you see on this screen depends on your role and the type of access you have.



## Navigation Basics

(continued)

### Universal Header Bar

PeopleSoft's Universal Header Bar is located at the top of the application page. It contains links that remain static as you navigate through other pages.



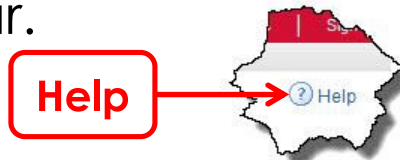
**Universal Header Bar**

## Navigation Methods

PeopleSoft provides users with several different ways to navigate through the system. Methods can be mixed and mingled. The way you choose to navigate is a matter of personal preference. Methods include:

- Drop-down menus
- Favorites
- Breadcrumbs
- Groups/Folders (a.k.a. Menu Pagelets)

Several methods are explained on the following screens. For more detailed information, click on the “**Help**” button in the Universal Header Bar.

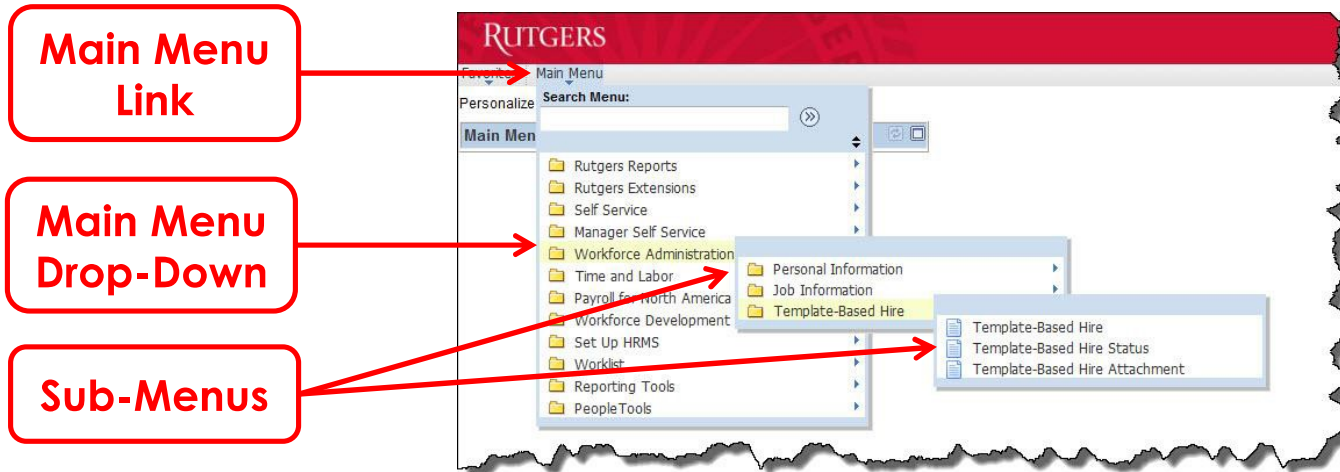


## Navigation Methods

(continued)

### Drop-Down Menu Navigation:

Click on the “**Main Menu**” link in the top left-hand side of the screen to activate a drop-down menu. Then, hold your cursor over the words in the drop-down to display cascading sub-menus below and to the right of the previous drop-down menu.



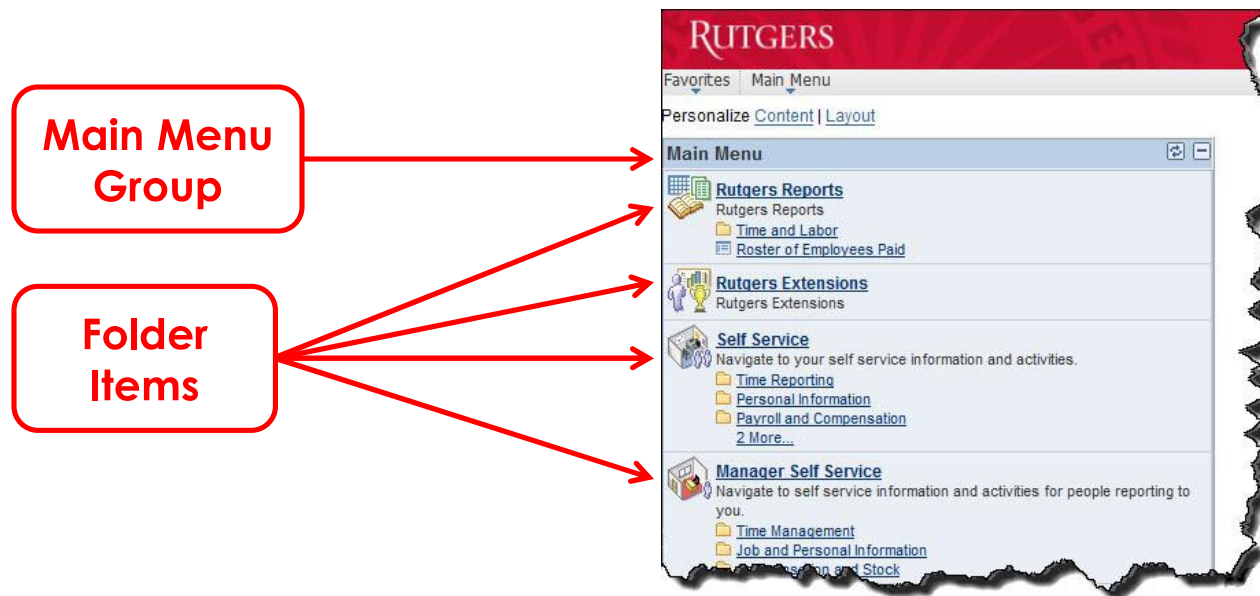


## Navigation Methods

(continued)

### Groups/Folders:

You can also click on a folder in the “**Main Menu**” group near the center of the screen to access any of the folder items displayed in the window.

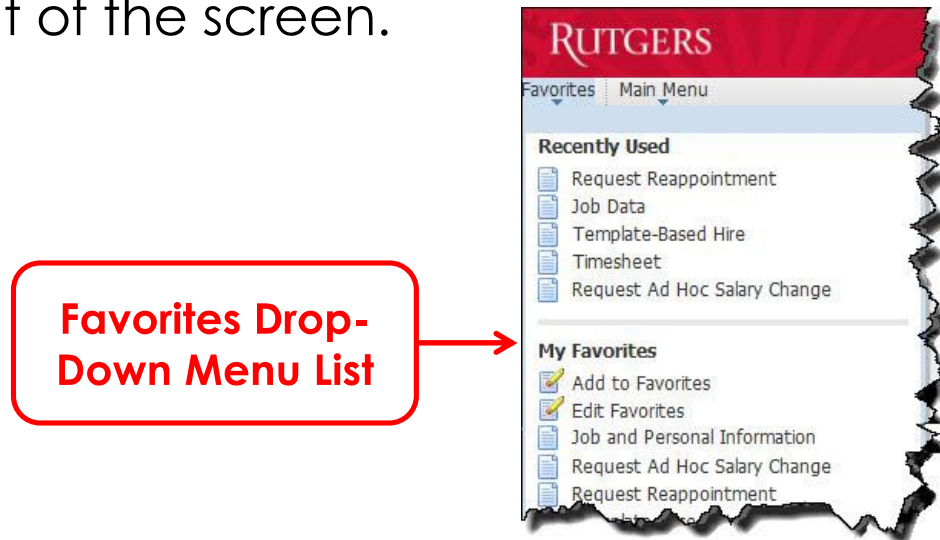


## Navigation Methods

(continued)

### Favorites:

You can also use the “**Favorites**” feature to access frequently used items. To add an item to “**My Favorites**” drop-down list, go to the item (e.g., “**Template-Based Hire**”) and then click on the “**Add to Favorites**” link in the top right of the screen.



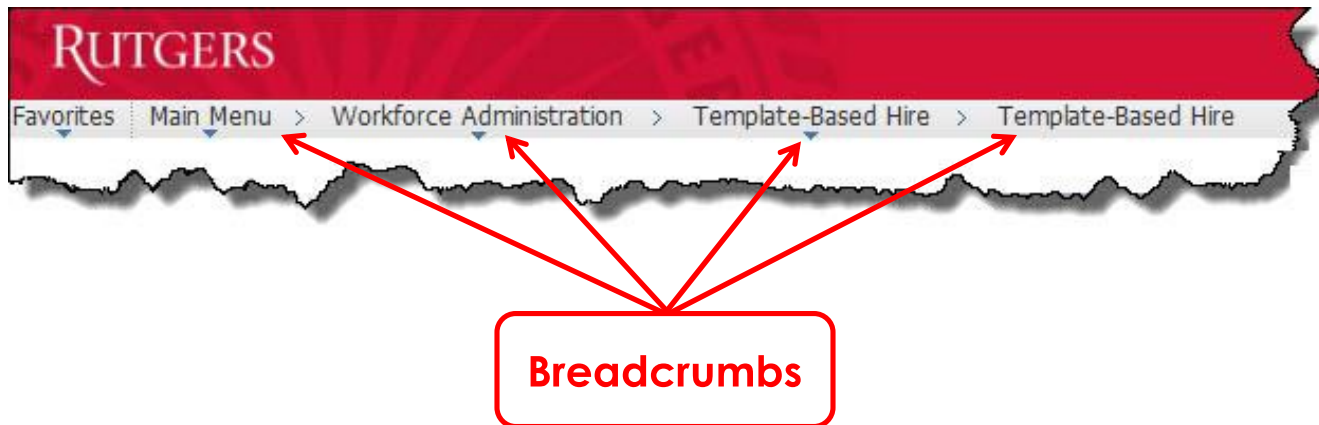


## Navigation Methods

(continued)




### Breadcrumbs:

As you move from the Main Menu to other areas, visual links appear at the top of the screen. These links are called Breadcrumbs. Breadcrumbs display the path taken to get to a screen. You can click on any of these to move to a particular point on the path.



## System Icons

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

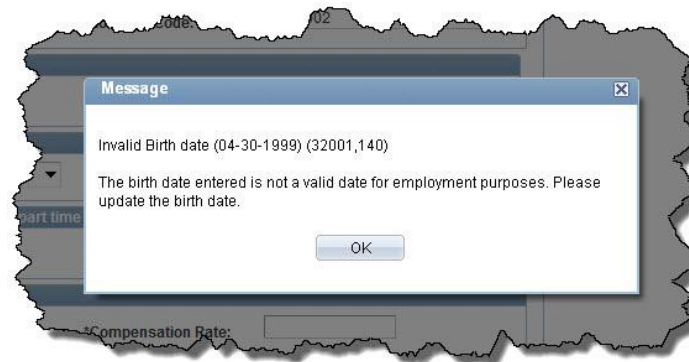
Icon	Action
	Choose a date from the calendar.
	Look up or search for a value.
	Select a value from a drop-down list.

When one of these icons appears next to a data entry field, users can click on them to open a drop-down list, look up a value, etc.

## Warning/Information Messages

The system displays messages to help users enter data so it meets certain requirements. Please be sure to read the content of the messages presented.

In the following example, the Preparer received this message because the system is coded to prevent hiring of employees under age 14.

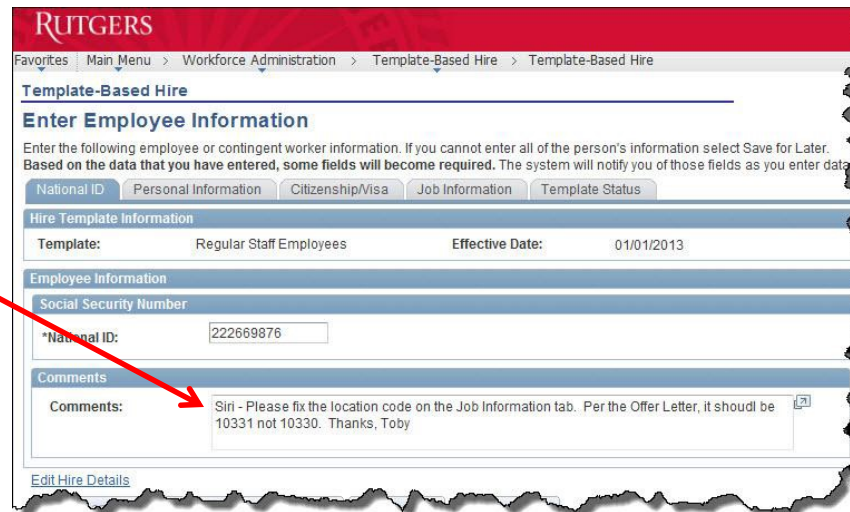


**Note:** In some cases you will not be able to move to the next step until you enter missing information or correct errors.

## Comments Fields

Preparers and Approvers should enter notes for each other directly into the “**Comments**” field at the bottom of the “**Employee Information**” screen. The comments entered remain visible no matter what tab is active.

Example of a Note Entered by an Approver to a Preparer about Required Changes.



The screenshot shows the 'Template-Based Hire' screen in the Rutgers HR system. The page title is 'RUTGERS' and the breadcrumb trail is 'Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire'. The main heading is 'Enter Employee Information'. Below this, there are tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'National ID' tab is active, showing 'National ID: 222669876'. The 'Comments' field is at the bottom, containing the text: 'Siri - Please fix the location code on the Job Information tab. Per the Offer Letter, it should be 10331 not 10330. Thanks, Toby'. A red arrow points from the text box in the callout to the 'Comments' field.

**Note:** If comments were entered by someone else, be careful to position your cursor after any existing text to avoid overwriting them.

# **Instructions for Preparers (Initial Submission)**

## Workforce Administration

To submit a TBH transaction, Preparers log into HCM and navigate to Workforce Administration using one of the navigation methods described earlier.

From the Workforce Administration menu, navigate to the **“Template-Based Hire”** group and click on the **“Template-Based Hire”** link.

The screenshot shows the Rutgers Workforce Administration web application. The top navigation bar includes the Rutgers logo and links for Home, Worklist, and Add to Favorites. The breadcrumb trail is Favorites > Main Menu > Workforce Administration. The main content area is titled 'Workforce Administration' and contains three main sections: 'Personal Information', 'Job Information', and 'Template-Based Hire'. The 'Template-Based Hire' section is highlighted with a red arrow pointing to a red callout box labeled 'Template-Based Hire Link'. The 'Job Information' section is also highlighted with a red arrow pointing to a red callout box labeled 'Template-Based Hire Group'. The 'Workforce Administration' section is highlighted with a red arrow pointing to a red callout box labeled 'Workforce Administration'.

**Workforce Administration**

**Template-Based Hire Group**

**Template-Based Hire Link**

## Steps to Enter a TBH

Entering a Template-Based Hire transaction is a multiple step process. The steps are:

1. Select Template
2. Enter Job Effective Date
3. Enter Data into Data Fields on the Template (e.g., National ID, Personal Information, etc.)
4. Attach Required Documents (e.g., Offer Letter)
5. Submit to Department Approver for Review and Approval
6. Modify TBH, if necessary, and Resubmit

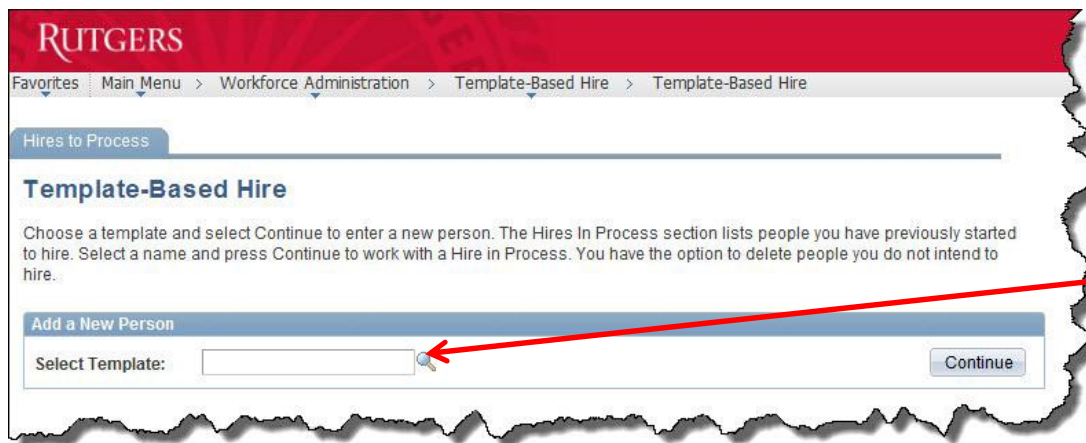
Each step is described in more detail on the following slides.



## Template Selection

The Offer Letter should indicate the type of position being filled. Preparers select the appropriate template from the list on the “**Hires to Process**” screen based on the information contained in the letter.

1. Click on the “” icon next to the “**Select Template**” field to open the list of available templates.





## Template Selection (continued)

2. Locate the appropriate template on the list and click on the link in the “**Template**” column to select the one you need. It will display in the “**Select Template**” field.
3. Click on the “**Continue**” button.

**Template Links**

**Template Selected**

**Continue Button**

Look Up Select Template

Search by: Template begins with

Look Up Cancel Advanced Lookup

Search Results

Template	Description
CLASS1_FACULTY	Faculty & Post Doc Assoc
CLASS1_GRADE_STEP	Staff - Grade Step
CLASS1_REGULAR	Regular Staff Employees
CLASS2_TRADES	Tradesmen
CLASS3_TEMP	Temporary Assignments
CLASS4_HOURLY	Casual/Seasonal
CLASS4_SUM_NONEX	Summer Temp 10-Month Nonexempt
CLASS5_STUDENT	Student Hourly
CLASS6_TAGA	Teaching/Graduate Assistants
CLASS7_PTL	Part Time Lecturer

04/11/2013 Hire United States

RUTGERS

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

Hires to Process

Template-Based Hire

Choose a template and select Continue to enter a new person. The Hires In Process section lists people you have previously started to hire. Select a name and press Continue to work with a Hire in Process. You have the option to delete people you do not intend to hire.

Add a New Person


Select Template: CLASS6\_TAGA Teaching/Graduate Assistants Continue

Hires in Process

Select	Name	Type of Hire	Start Date	Action	Country
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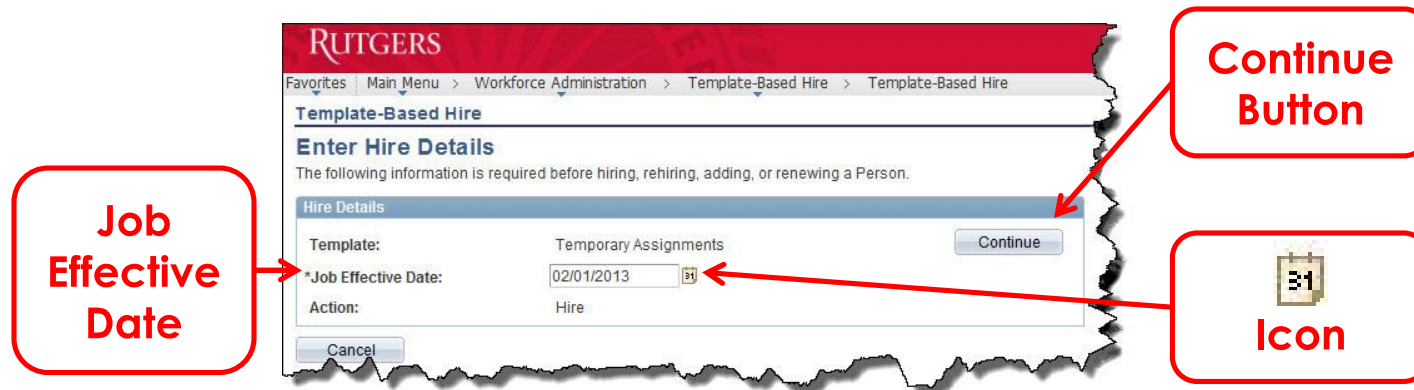
## Enter Effective Date

Locate the date the job goes into effect in the Offer Letter. It is usually a date in the future, but it can be today's date or a date in the past.

1. Type the date into the “**Job Effective Date**” field using MM/DD/YYYY format or click on the “” icon and select a date from the calendar.

**Note:** The system defaults to today's date.

2. Click on the “**Continue**” button.



## Enter Employee Information

The “**Enter Employee Information**” screen appears next. The template you selected and the effective date you entered displays in the “**Hire Template Information**” area of the screen under the tabs.

The screenshot shows the Rutgers HR system interface. At the top, the Rutgers logo is visible. Below it, a breadcrumb trail reads: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The main heading is "Template-Based Hire". Below this is the "Enter Employee Information" section, which includes a sub-heading and instructions: "Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data." There are five tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The "Hire Template Information" section is highlighted in blue and contains the following data: "Template: Teaching/Graduate Assistants" and "Effective Date: 02/01/2013". Three red callout boxes are present: one labeled "Hire Template Information" pointing to the "Hire Template Information" section header; one labeled "Template Selected" pointing to the "Teaching/Graduate Assistants" value; and one labeled "Effective Date Entered" pointing to the "02/01/2013" value.

## Enter Employee Information (continued)

Tabs appear at the top of the screen. Work in order from the left tab to the right, working from top to bottom on each tab, and enter the required information into each tab. If you do not have all of the information needed to complete the TBH, click on the **“Save for Later”** button and return to it when you do.

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is titled 'Template-Based Hire' and 'Enter Employee Information'. It contains several sections: 'Hire Template Information' (Template: Teaching/Graduate Assistants, Effective Date: 02/01/2013), 'Employee Information' (National ID: 111445432), and 'Comments'. At the bottom, there are buttons for 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A red box labeled 'Tabs' points to the tabs at the top: 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. A red box labeled 'Save for Later' points to the 'Save for Later' button.

## Using “Save for Later”

If you do not have all of the required information or need to stop working on a TBH for any reason, you can use the “**Save for Later**” feature to capture the data you already entered. Click on the “**Save for Later**” button that appears at the bottom of each tab of the “**Employee Information**” screens.

Save for Later  
Button

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is titled 'Template-Based Hire' and 'Enter Employee Information'. It contains several sections: 'Hire Template Information' with fields for 'Template' (Teaching/Graduate Assistants) and 'Effective Date' (04/15/2013); 'Employee Information' with a 'Social Security Number' field and a '\*National ID' field (containing 111445432); and a 'Comments' section with a text area. At the bottom, there are four buttons: 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A red callout box with the text 'Save for Later Button' and an arrow points to the 'Save for Later' button.

## Returning to Complete a Saved TBH

To return to a saved TBH to complete it, navigate to:

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

1. Locate the employee's name in the **"Hires in Process"** area of the screen.
2. Click on the link in the **"Name"** column.

**Hires in Process Area**

**Links in Name Column**

RUTGERS

Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Hires to Process

### Template-Based Hire

Choose a template and select Continue enter a new person. The Hires to Process section lists people you have previously started to hire. Select a name and press Continue to work with a Hire in Process. You have the option to delete people you do not intend to hire.

Add a New Person

Select Template:

Select	Name	Type of Hire	Start Date	Action	Country
<input type="checkbox"/>	<a href="#">Sheldon Cooper</a>	Employee	03/11/2013	Hire	United States
<input type="checkbox"/>	<a href="#">Raj Koothrappali</a>	Employee	03/12/2013	Hire	United States
<input type="checkbox"/>	<a href="#">Leonard Hofstadter</a>	Employee	03/18/2013	Hire	United States
<input type="checkbox"/>	<a href="#">Howard Wolowitz</a>	Employee	04/01/2013	Hire	United States

Select All | Deselect All

Delete Selected Names


Go To: [Template-Based Hire Status](#)



## Returning to Complete a Saved TBH

(continued)

4. On the “**Enter Hire Details**” screen, click on the “**Continue**” button.



The screenshot shows the Rutgers 'Enter Hire Details' form. The form is titled 'Template-Based Hire' and 'Enter Hire Details'. The name 'Raj Koothrappali' is entered. Below the name, it states: 'The following information is required before hiring, rehiring, adding, or renewing a Person.' The 'Hire Details' section contains the following fields: 'Template:' with the value 'Part Time Lecturer', '\*Job Effective Date:' with the value '02/01/2013', and 'Action:' with the value 'Hire'. A 'Continue' button is located to the right of the 'Template:' field. A red arrow points from a red-bordered box containing the text 'Continue Button' to the 'Continue' button. A 'Cancel' button is located below the 'Hire Details' section. At the bottom left, there is a note: '\* Required Field'.

5. Once in the TBH for the employee you selected, enter the rest of the data and then submit the TBH to the department's Approver for review and approval as usual.

## Enter National ID (SSN)

1. Type the employee's Social Security Number (SSN) into the "**National ID**" field on the "**National ID**" tab.
2. Click on the "**Personal Information**" tab.

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is titled 'Template-Based Hire' and includes a breadcrumb trail: 'Favorites > Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire'. The form is divided into several sections: 'Enter Employee Information', 'Hire Template Information', 'Employee Information', and 'Comments'. The 'Enter Employee Information' section contains a 'National ID' field with the value '111445432' and a 'Personal Information' tab. The 'Hire Template Information' section includes 'Template: Teaching/Graduate Assistants' and 'Effective Date: 02/01/2013'. The 'Employee Information' section includes a 'Social Security Number' field. The 'Comments' section includes a 'Comments:' field. The form also has buttons for 'Save and Submit', 'Save for Later', 'Cancel', and 'Add Attachment'. A legend at the bottom left indicates '\* Required Field'. Three red callout boxes with arrows point to specific elements: 'National ID Tab' points to the 'National ID' tab, 'National ID/SSN Field' points to the 'National ID' input field, and 'Personal Info. Tab' points to the 'Personal Information' tab.

**National ID Tab**

**National ID/SSN Field**

**Personal Info. Tab**

**Note:** See the next slide for additional information about Social Security Numbers.



## Enter National ID (SSN)

(continued)

For tax purposes, every employee must have a Social Security Number in order to work at Rutgers. If the employee is not a US Citizen and does not have a SSN, then enter all 9's into the “**National ID**” field.

**National ID Field – All 9's Entered for Non US Citizen without a SSN**

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is titled 'Template-Based Hire' and includes a navigation menu with 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'National ID' field is highlighted with a red arrow pointing to the value '999999999'. The form also includes fields for 'Social Security Number', 'Comments', and 'Edit Hire Details'.

**Note:** The employee must apply for a SSN before hire and show the Social Security Administrations confirmation receipt to the Preparer. Hire requests cannot be submitted without a SSN or a confirmation receipt.

## Enter Personal Information

Enter data on the “**Personal Information**” tab.

1. Type or select data to populate the fields. Fields marked with an asterisk (\*) are required and must be completed in order to move to the next tab.

**Personal Information Tab**

**Required Fields**

**RUTGERS**  
Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

**Template-Based Hire**  
**Enter Employee Information**  
Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later.  
Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.

National ID | **Personal Information** | Citizenship/Visa | Job Information | Template Status

**Hire Template Information**  
Template: Teaching/Graduate Assistants      Effective Date: 02/01/2013

**Employee Information**  
**National ID**  
National ID: 111-44-5432

**Primary Name - English**  
Name Prefix: Dr. ▼  
\*First Name: Eric  
Middle Name:  
\*Last Name: Gablehauser

## Enter Personal Information

(continued)

2. Enter at least one phone number into one of the three “**Person Phone Number**” fields, even though none of the fields are marked with an asterisk.

The screenshot shows a web form with the following fields:

- \*State: NJ
- \*Postal Code: 08765
- County:
- Person Phone Number 01: Phone Type: Home, Telephone: 848-200-5678
- Person Phone Number 02: Phone Type: Business, Telephone:
- Person Phone Number 03: Phone Type: Mobile, Telephone:
- Person Email Address 01: Email Type: Home, \*Email Address: drEG@bbtphysicsdept.net
- Comments

A red callout box on the left contains the text "Person Phone Number Fields" and has three red arrows pointing to the three phone number sections.

## Enter Personal Information (continued)

- When finished, click on the “**Citizenship/Visa**” tab.

**Citizenship/Visa Tab**

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The 'Citizenship/Visa' tab is highlighted with a red box and an arrow pointing to it. The form includes the following sections:

- Hire Template Information:** Template: Teaching/Graduate Assistants, Effective Date: 02/01/2013.
- Employee Information:**
  - National ID:** 111-44-5432
  - Primary Name - English:**
    - Name Prefix: Dr.
    - \*First Name: Eric
    - Middle Name:
    - \*Last Name: Gablehauser

## Enter Citizenship/Visa Information

1. Click on the “▼” icon next to the “**US Citizen**” field in the “**Citizenship Information**” section.
2. Is employee a US Citizen?
  - A. If so, select “**Yes**” from the list. The system will populate the remaining Citizenship Information fields (e.g., Country of Residence) automatically.

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is divided into several sections: 'New Hire Template Information', 'Employee Information', and 'Citizenship Information'. The 'Citizenship Information' section is highlighted with a red box. The 'US Citizen' field is set to 'Yes'. The 'Permanent US Resident (Non US Citizen)' field is set to 'No'. The 'Does person have a work Visa?' field is set to 'No'. The 'Country of Residence' field is populated with 'USA'. Red arrows point from the 'US Citizen = Yes' annotation to the 'US Citizen' dropdown, and from the 'System Populated Fields' annotation to the 'Permanent US Resident', 'Does person have a work Visa?', and 'Country of Residence' fields.

**US Citizen = Yes**

**System Populated Fields**

**RUTGERS**  
Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

**Template-Based Hire**

**Enter Employee Information**  
Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later.  
Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.

National ID | Personal Information | **Citizenship/Visa** | Job Information | Template Status

**New Hire Template Information**  
Template: Teaching/Graduate Assistants Effective Date: 02/01/2013

**Employee Information**

**Citizenship Information**

US Citizen: Yes

\*Permanent US Resident (Non US Citizen): No

\*Does person have a work Visa?: No

\*If no, enter Country of Residence: USA

## Enter Citizenship/Visa Information (continued)

B. If not, select “**No**” from the list.

The screenshot shows a web form with several tabs: Personal Information, Citizenship/Visa, Job Information, and Template Status. The 'Citizenship/Visa' tab is active. The form contains the following fields:

- Template: CoAdj, Faculty, Research
- Effective Date: 05/15/2013
- Employee Information
- Citizenship Information
  - US Citizen: No (dropdown menu)
  - \*Permanent US Resident (dropdown menu)
  - (Non US Citizen): (dropdown menu)
  - \*Does person have a work Visa?: (dropdown menu)
  - \*If no, enter Country of Residence: (text input field)
- Personal Information for Nonresidents (partially visible)

A red callout box on the left contains the text "US Citizen = No" with an arrow pointing to the "US Citizen" dropdown menu.

The “**Non US Citizen**” message will appear. Click on the “**OK**” button.

The screenshot shows a "Message" dialog box with the following content:

- Effective Date: 05/15/2013
- Message
- Non US Citizen (32001,194)
- You are identifying the person is not a US Citizen. All of the fields in the Citizenship Section must be accurately populated. If you have any questions, please contact your HR Representative.
- OK button

Two red callout boxes on the left point to the message and the OK button. The first callout box contains the text "Non US Citizen Message" and the second callout box contains the text "OK Button".



## Enter Citizenship/Visa Information

(continued)

- C. If the employee is not a US citizen, but is a permanent resident of the US, select “**Yes**” from the “**Permanent US Resident**” drop-down list. The “**Country of Residence**” field will default to “**USA**” automatically.

Not on the data that you entered, some fields will become required. The system will filter those fields as you enter data.

National ID Personal Information **Citizenship/Visa** Job Information Template Status

Hire Template Information

Template: Part Time Lecturer Effective Date: 02/01/2014

Employee Information

Citizenship Information

\*US Citizen: No

\*Permanent US Resident (Non US Citizen): Yes

\*If no, enter Country of Residence: USA

\*Does person have a work Visa?:

Visa/Permit Information for Nonresidents

Visa/Permit Type:

**Permanent US  
Resident = Yes**

**Country of  
Residence = USA**

## Enter Citizenship/Visa Information (continued)

- D. Select “**No**” from the drop-down list next to the “**Does person have a work Visa?**” field.

The screenshot shows a web form with several tabs: National ID, Personal Information, Citizenship/Visa (selected), Job Information, and Template Status. The form is divided into sections: Hire Template Information, Employee Information, Citizenship Information, and Visa/Permit Information for Nonresidents. In the Citizenship Information section, the following fields are visible: \*US Citizen: No; \*Permanent US Resident (Non US Citizen): Yes; \*Does person have a work Visa?: No. A red arrow points from a callout box to the 'No' selection in the 'Does person have a work Visa?' field. The 'Country of Residence' field is set to USA.

**Does person have a  
work VISA? = No**



## Enter Citizenship/Visa Information (continued)

- E. If the employee is not a US citizen and is not a permanent resident of the US, select “**No**” from the “**Permanent US Resident**” list.

**Permanent US Resident = No**

Employee Information

Citizenship Information

\*US Citizen: No

\*Permanent US Resident: No

\*Non US Citizen:

\*Does person have a work Visa?:

\*If no, enter Country of Residence:

- F. The “**Country Required**” message will appear. Click on the “**OK**” button to dismiss it.

**Country Required Message**

**OK Button**

Message

Country Required (32001,181)

You have indicated the person is not a Permanent US Resident. You must identify the Country of Residence.

OK

## Enter Citizenship/Visa Information (continued)

- G. Click on the “🔍” icon next to the “**Country of Residence**” field.

The screenshot shows a web form with several sections: 'Template Information', 'Employee Information', and 'Citizenship Information'. The 'Citizenship Information' section contains several dropdown menus and a text field. A red box labeled 'Country of Residence Field' points to the text field. Another red box labeled 'Icon' points to a magnifying glass icon next to the text field.

Template Information	
Template:	CoAdj, Faculty, Research
Effective Date:	05/15/2013

Employee Information	
Citizenship Information	
*US Citizen:	No
*Permanent US Resident (Non US Citizen):	No
*Does person have a work Visa?:	

\*If no, enter Country of Residence:  🔍

- H. Scroll through the list in the “**Look Up**” window and click on a link in the “**Country**” column to select it.

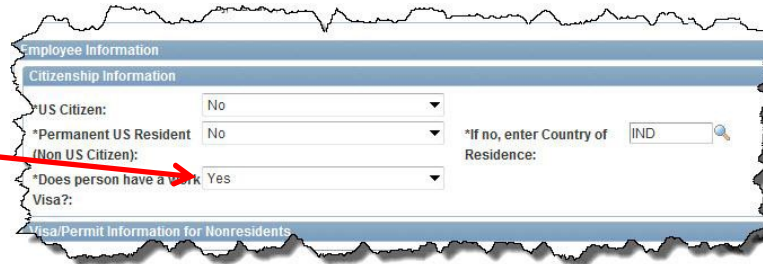
The screenshot shows a 'Look Up' window titled 'Look Up If no, enter Country of Residence'. It has a search field and a 'Look Up' button. Below the search field is a table of search results with columns 'Country' and 'Description'. A red box labeled 'Look Up Window - Country Column and Links' points to the 'Country' column of the table.

Country	Description
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla

## Enter Citizenship/Visa Information (continued)

- I. If the person has a work visa or permit, select **“Yes”** from the drop-down list in the **“Does person have a work Visa?”** field.

Does person  
have a work  
Visa? = Yes



The screenshot shows a form titled "Employee Information" with a sub-section "Citizenship Information". The fields are: "US Citizen:" with a dropdown menu set to "No"; "\*Permanent US Resident (Non US Citizen):" with a dropdown menu set to "No"; and "\*Does person have a work Visa?:" with a dropdown menu set to "Yes". To the right, there is a field for "\*If no, enter Country of Residence:" with a dropdown menu set to "IND". A red arrow points from the "Does person have a work Visa? = Yes" text box to the "Yes" option in the dropdown menu.

- J. The **“Visa/Permit Data is required”** message will appear. Click on the **“OK”** button to dismiss it.

Visa/Permit Data  
Required Message

OK Button



## Enter Citizenship/Visa Information (continued)

- K. If the person does not have a work visa or permit, select “**No**” from the drop-down list in the “**Does person have a work Visa?**” field.

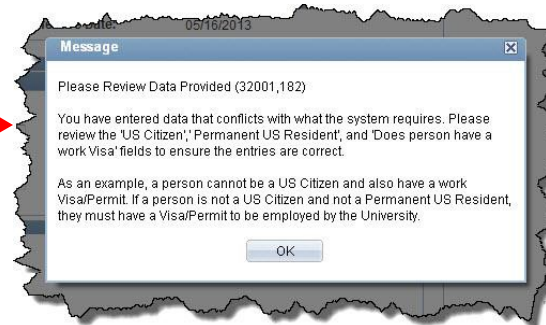
Does person  
have a work  
Visa? = No



The screenshot shows a web form titled 'Citizenship Information'. It contains several dropdown menus: '\*US Citizen:' (set to 'No'), '\*Permanent US Resident (Non-US Citizen):', and '\*Does person have a work Visa?:' (set to 'No'). To the right, there is a field for '\*If no, enter Country of Residence:'. A red arrow points from a text box on the left to the 'Does person have a work Visa?' dropdown.

- L. The “**Please Review Data Provided**” message will appear.

Please Review  
Data Provided  
Message



## Enter Citizenship/Visa Information

(continued)

- M. Click on the “**OK**” button to dismiss the message and review your entries to make sure they are accurate.

**Note:** If the person is not a US Citizen or Permanent US Resident and does not have a work visa or permit, then he/she cannot work at Rutgers. You cannot proceed with the TBH and will need to contact the hiring authority to inform them of this.



## Enter Citizenship/Visa Information

(continued)

- N. If the person has a work visa or permit and you selected “**Yes**” in the “**Does person have a work Visa?**” field (see step 2 I for details), then you must complete all fields in the “**Visa/Permit Information for Nonresidents**” section.

**Visa/Permit  
Information  
for  
Nonresidents  
Sections**

The screenshot shows the Rutgers HR system interface for entering employee information. The page is titled "Template-Based Hire" and "Enter Employee Information". It includes tabs for "National ID", "Personal Information", "Citizenship/Visa", "Job Information", and "Template Status". The "Citizenship/Visa" tab is active. The form contains several sections: "Hire Template Information" (Template: CoAdj, Faculty, Research; Effective Date: 05/16/2013), "Employee Information", "Citizenship Information" (with fields for \*US Citizen, \*Permanent US Resident, \*Does person have a work Visa?, and \*if no, enter Country of Residence), and "Visa/Permit Information for Nonresidents" (with fields for Visa/Permit Type, Date of Entry into Country, Visa/Permit Status, Status Date, and Status Expiration Date). A red box highlights the "Visa/Permit Information for Nonresidents" section, and a red arrow points from the text box on the left to this section.

## Enter Citizenship/Visa Information

(continued)

- When finished entering data in the Citizenship/Visa information areas, click on the “🔍” in the “**Job Information – Job Code**” area to access the list of available job codes.
- Click on the code that matches the one specified in the Offer Letter to select it.

The screenshot shows a form with the following fields and sections:

- Visa/Permit Status:
- Status Date:  31
- Status Expiration Date:  31
- Job Information - Job Code (Section Header)
- \*Job Code:  99722 🔍
- Comments (Section Header)
- Comments:

Annotations:

- A red box labeled "Job Info. – Job Code Area" points to the "Job Information - Job Code" section header.
- A red box labeled "Selected Job Code" points to the "99722" value in the "\*Job Code:" field.
- A red box labeled "Button" points to the magnifying glass icon in the "\*Job Code:" field.

**Note:** The list of available Job Codes differs based on the template selected.



## Enter Citizenship/Visa Information

(continued)

5. Click on the “**Job Information**” tab to proceed to the next section.

**Job Information Tab**

The screenshot shows the Rutgers HR system interface. At the top, there is a red header with the Rutgers logo. Below the header, there is a breadcrumb trail: Favorites > Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The main content area is titled 'Template-Based Hire' and 'Enter Employee Information'. Below this, there is a message: 'Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.' There are five tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The 'Job Information' tab is highlighted with a red arrow pointing to it from the 'Job Information Tab' label above. Below the tabs, there is a section titled 'Hire Template Information' with a table showing 'Template: Teaching/Graduate Assistants' and 'Effective Date: 02/01/2013'.



## Enter Job Information

1. Enter data. Some fields (e.g., Description, FLSA Status, Union Code, etc.) are populated by the system based on the template used and the Job Code selected on the previous screen.

Examples  
of Auto-  
Populated  
Fields

RUTGERS

Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire

Template-Based Hire

**Enter Employee Information**

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter data.

National ID | Personal Information | Citizenship/Visa | **Job Information** | Template Status

**Hire Template Information**

Template: Teaching/Graduate Assistants      Effective Date: 02/01/2013

**Employee Information**

**Job Code Information**

Job Code: 99722      Description: TEACHING ASSISTANT ACD YR  
Standard Hours: 15.000000      FLSA Status: Exempt  
Union Code: 008

**Work Location - Position Data**

Position Entry Date: 02/01/2013

**Work Location - Expected Job End Date**

**Note:** See next slide for important information about Standard Hours.

## Enter Job Information (continued)

The full-time standard hours for the position always display at the top of the screen. If the employee will be part-time, select “**Part-Time**” from the “**\*Full/Part Time**” field, then enter the reduced hours into the “**\*Standard Hours**” field.

The screenshot shows the 'Enter Employee Information' form in the Rutgers HR system. The form is divided into several sections: 'Hire Template Information', 'Employee Information', 'Job Code Information', 'Work Location - Position Data', 'Work Location - Expected Job End Date', 'Work Location - Job Fields', 'Job Information - Reporting Information', and 'Job Information - Status'. The 'Job Code Information' section is highlighted, showing 'Job Code: 99752', 'Standard Hours: 15.000000', 'Description: GR...', and 'FLSA Status: Exe...'. The 'Work Location - Job Fields' section shows 'Department: 10330' and '\*Location Code: 3000'. The 'Job Information - Status' section shows '\*Full/Part Time: Part-Time' and '\*Standard Hours: 7.500000'. Three red callout boxes with arrows point to specific fields: the first points to the 'Standard Hours' field in the 'Job Code Information' section, the second points to the '\*Full/Part Time' dropdown menu, and the third points to the '\*Standard Hours' field at the bottom of the form.

**Default Standard Hours for Full-Time Position**

**\*Full/Part Time Field with Part-Time Selected**

**\*Standard Hours Field with Number of Hours Employee will Work Entered**

## Enter Job Information

(continued)

- If you do not have a copy of the Offer Letter, click on the “▼” next to the “**Job Attachment Exists**” field and select “**No**” from the list. Then, click on the “**Save for Later**” button.

If you have the Offer Letter, select “**Yes**” and click on the “**Add Attachment**” button.



## Attach Offer Letter

After you click on the “**Add Attachment**” button, a “**Job Offer Attachment**” window will open in front of the TBH “**Employee Information**” screen.

1. Click on the “**Search**” button to see the hires you entered recently.

The screenshot shows the 'Job Offer Attachment' search interface. A red callout box labeled 'Job Offer Attachment Window' points to the title bar of the window. Another red callout box labeled 'Search Button' points to the 'Search' button at the bottom of the form. The form includes a breadcrumb trail, a search instruction, a 'Find an Existing Value' button, a 'Maximum number of rows to return' field set to 300, and several search criteria fields: Template Sequence, Empl ID, Empl Record, Name, Department ID, Department, User ID, Entered From, and Entered Until. The 'Entered From' and 'Entered Until' fields are pre-filled with '01/02/2013' and '02/02/2013' respectively. There is also a 'Case Sensitive' checkbox and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

**Note:** The dates in the “Entered From” and “Entered Until” default to the past month. You can change the dates if necessary.

## Attach Offer Letter

(continued)

- The TBH transactions you entered within the date range specified will display in the “**Search Results**” area. Locate the employee in results area and click on the link in the “**Name**” column.

The screenshot shows the Rutgers Job Offer Attachment search interface. The search criteria are as follows:

Field	Value
Template Sequence	=
Empl ID	begins with
Empl Record	=
Name	begins with
Department ID	begins with
Department	begins with
User ID	begins with WZYZ
Entered From	>= 01/02/2013
Entered Until	<= 02/02/2013

The search results table is shown below:

Template Sequence	Empl ID	Empl Record	Name	Department ID	Department
47983	NEW	0	Penny Unknown	10330	SAS - English
48009	NEW	0	Leslie Winkle	10330	SAS - English
48028	NEW	0	Eric Gablehauser	10330	SAS - English
48002	NEW	0	Raj Koothrappali	10330	SAS - English
47991	NEW	0	Sheldon Cooper	10330	SAS - English

Annotations in the image point to the following elements:

- Name Column**: Points to the 'Name' column header in the search results table.
- Search Results Area**: Points to the entire search results table.
- Name Links**: Points to the individual names in the 'Name' column, which are hyperlinks.

## Attach Offer Letter

(continued)

3. On the “**Template-Base Hire Attachment**” screen, click on the “

**Add Attachment Button**

**Attachment Type Column**

RUTGERS

Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire Attachment

Template Based Hire Attachment

Empl ID NEW Empl Record 0 Eric Gablehauser  
Department 10330 SAS - English  
Job Code 99722 TEACHING ASSISTANT ACD YR

Add Attachment

Note: File name must be less than 65 characters

*Attachment Type	Updated By	Last Update Date/Time
1 Offer Letter		02/01/13 3:09:39PM

Save | Return to Search | Previous in List | Next in List | Notify

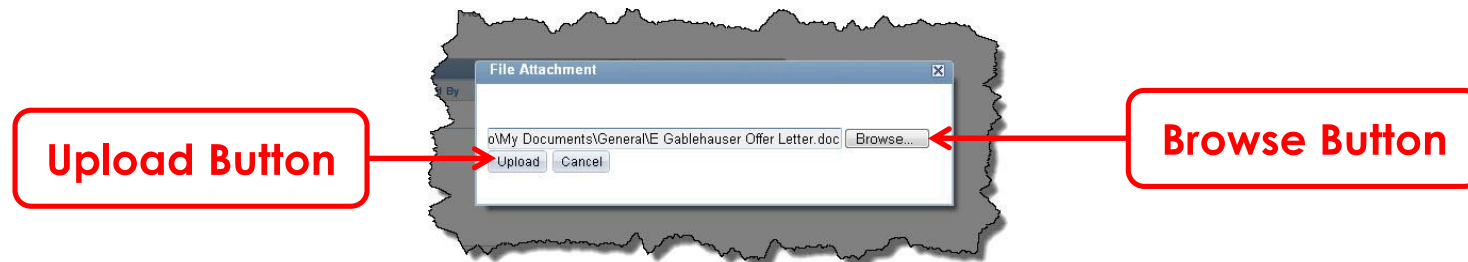
**Note:** “Offer Letter” must appear in the “Attachment Type” field. You will not be able to submit the request if it does not.



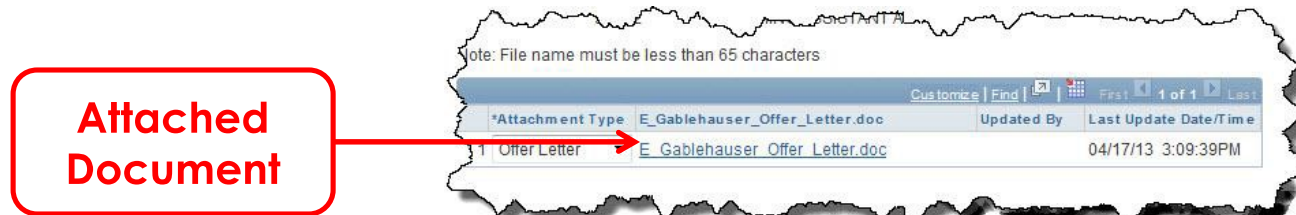
## Attach Offer Letter

(continued)

5. Click on the **“Browse”** button on the “File Attachment” window, locate the Offer Letter on your computer and click on the file name to select it.
6. Then, click on the **“Upload”** button.



7. Confirm the correct document was uploaded by looking at the name of the file on the screen.



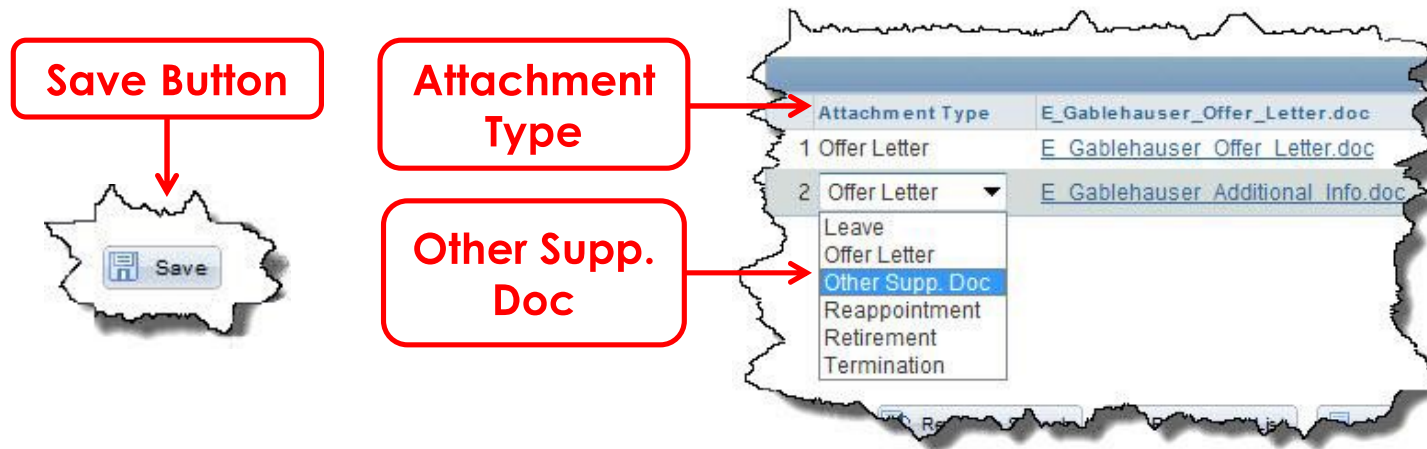


## Attach Offer Letter

(continued)


- Click on the **“Save”** button.

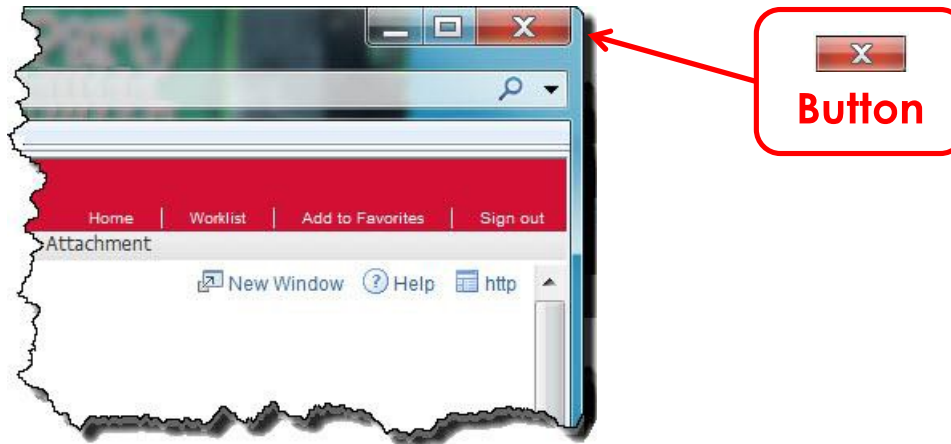
If you have additional documents to upload, click on the **“Add Attachment”** button again, and repeat steps 5 through 7. Select **“Other Supp. Doc”** from the **“Attachment Type”** drop-down list, then click on **“Save”** again. Repeat as many times as needed.



## Attach Offer Letter

(continued)

- Click on the “” button in the top right corner of the “**Template Based Hire Attachment**” window to close it. After it is closed you will see the “**Job Information**” tab of the Template-Based Hire “**Employee Information**” screen.



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

## Attachment File Names

When creating file names, please keep in mind other people need to access the attachment so the name should reflect the type of document it is and what it is for. The following file name guidelines should be followed:

1. It should be a PDF so other people cannot change it.  
**Note:** The file extension must be lower case (pdf not PDF) due to a known problem with upper case extensions.
2. The file name should be shorter than 40 characters.
3. The employee's last name should be included.
4. Including the effective date is helpful.
5. If revised, the name should reflect it (e.g., include "rev" at the end).

## Attachment File Names

(continued)

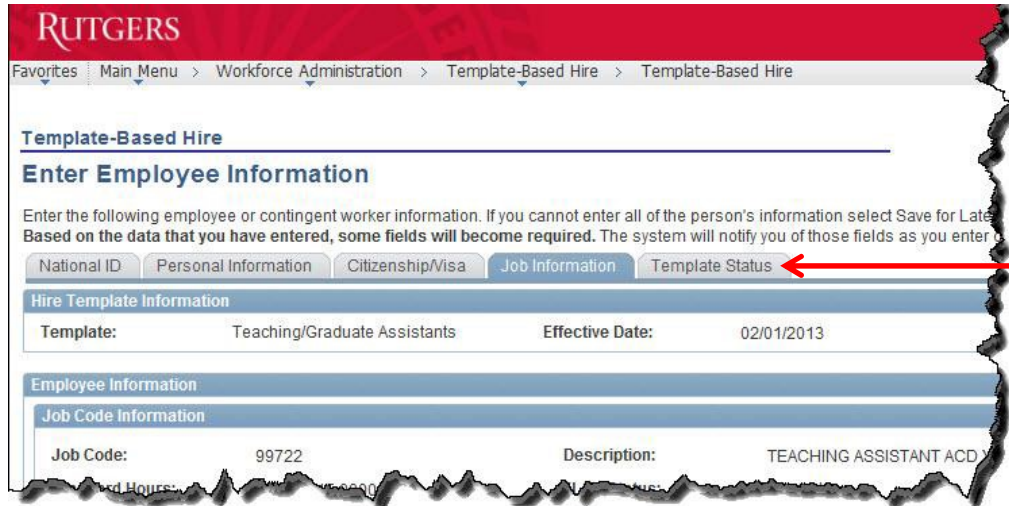
The following are examples of well-named Offer Letters:

- Sheldon Cooper\_Offer Ltr\_05 02 13.pdf
- LeonardHofstadter\_offer\_050213.pdf
- H\_Wolowitz\_offer\_revised 5 2 13.pdf
- Koothrappali R\_offer ltr 5 2 13\_rev.pdf
- Revised Leslie Winkle Offer 5 2 13.pdf
- Offer Letter\_A Fowler\_May 2 13.pdf
- B Rostenkowski offer May 2 2013.pdf
- Cooper\_S offr ltr 050213 rev2.pdf

## Change Template Status

You are ready to complete the last step in the process to submit the TBH for review by the department Approver.

1. Click on the **“Template Status”** tab.



The screenshot shows the Rutgers HR system interface. The breadcrumb trail is: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The page title is "Template-Based Hire". The main heading is "Enter Employee Information". Below this, there is a instruction: "Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later. Based on the data that you have entered, some fields will become required. The system will notify you of those fields as you enter." There are five tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The "Template Status" tab is highlighted and has a red arrow pointing to it from a red box labeled "Template Status Tab". Below the tabs, there are sections for "Hire Template Information" (Template: Teaching/Graduate Assistants, Effective Date: 02/01/2013), "Employee Information", and "Job Code Information" (Job Code: 99722, Description: TEACHING ASSISTANT ACD).

## Template Status Tab (continued)

2. Click on the “▼” in the “**Template Complete**” field in the “**Template Status**” area and select “**Yes**” from the list. This activates the “Save and Submit” button.
3. If needed, click in “**Comments**” box and type notes for the Approver.

The screenshot shows the 'Template-Based Hire' form in the Rutgers HR system. The form is titled 'Enter Employee Information' and includes a 'Template Status' tab. The 'Template Status' section contains a 'Template Complete' dropdown menu set to 'Yes'. Below this is a 'Comments' text area. Three red callout boxes with arrows point to these elements: 'Template Status' points to the 'Template Status' tab, 'Template Complete = Yes' points to the dropdown menu, and 'Comments Box' points to the text area. The form also includes a 'Save and Submit' button and other navigation options like 'Save for Later', 'Cancel', and 'Add Attachment'.

**Template Status**

**Template Complete = Yes**

**Comments Box**

## Template Status Tab (continued)

- Click on the **“Save and Submit”** button to send the transaction to the Approver for review.

The screenshot shows the 'Template-Based Hire' form in the Rutgers HR system. The 'Template Status' tab is active, displaying fields for 'Hire Template Information' (Template: Teaching/Graduate Assistants, Effective Date: 02/01/2013) and 'Employee Information' (\*Template Complete: Yes). A red callout box labeled 'Save and Submit Button' points to the 'Save and Submit' button at the bottom of the form. Other buttons include 'Save for Later', 'Cancel', and 'Add Attachment'.

**Note:** Once you click on “Save and Submit” you cannot make changes unless the Approver routes the TBH back to you for corrections. Therefore, you may want to compare your entries to the information in the Offer Letter before you click on the “Save and Submit” button.



## Confirmation Screen

After you submit the transaction for review, you will see a “**Submit Confirmation**” screen indicating the TBH was sent to the Approver for review. At this point your work for this TBH is complete unless the Approver sends the TBH back to you for changes. Click on the “**OK**” button to exit the transaction and return to the TBH “**Hires to Process**” screen.



From here you can process other hires, move to another transaction, or sign out of the system.

## Email and Routing to Department Approver

The system generates an email and sends it to the Approver. You, the Preparer, are copied on the message. At this point the transaction is ready for the Department Approver. The Approver must review and approve the TBH to route it to the HCM Unit, ALR, or the database for actual processing.

**To: Approver**  
**Cc: Preparer**

To: Toby Approver  
Cc: Siri Preparer  
Subject: Eric Gablehauser has been submitted for HIR into your department (10330).

Hi Toby,

Eric Gablehauser has been submitted for hire (Action: HIR) into your department.

SeqNum: 48001  
Status: PEND  
Action: HIR

Click on the link below to review the request. If the link doesn't work for you, you can copy and paste the URL into your browser.

[https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/RU\\_CUSTOM\\_MENU.RU\\_HR\\_TBH\\_DEPT\\_APV.GBL?Page=RU\\_TBH\\_PEND\\_LIST&Action=U](https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/RU_CUSTOM_MENU.RU_HR_TBH_DEPT_APV.GBL?Page=RU_TBH_PEND_LIST&Action=U)

If you are in the application, you can navigate to the page using the following navigation:

Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

Thank you,  
University Human Resources

**Instructions for Approvers and  
Preparers  
(Review, Correction and Approval)**

## Review and Approval Email

After the Preparer submits the TBH, the system sends an email to the Approver. The Preparer is copied on the message. To access the transaction, the Department Approver clicks on the link in the email or navigates to the HCM “**Department Hire Approval**” screen using the path provided.



## Workforce Administration Navigation

If the link in the email does not work, you can log into HCM and navigate to “**Workforce Administration**” using one of the navigation methods described earlier.

From the Workforce Administration menu, navigate to the “**Template-Based Hire**” and click on “**Department Hire Approval**”.



## Workforce Administration Navigation

(continued)

The “**Pending Approval**” screen displays a list of hire transactions that you need to review and approve. Locate the one you want to view in the list, then click on the link in the “**Name**” column to open it.

The screenshot shows the 'Pending Approval' screen in the Rutgers Workforce Administration system. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval. The page title is 'Pending Approval'. Below the title is a message: 'Please click on the name of the pending hire that needs to be approved.' A table titled 'Hires to Approve' is displayed. The table has columns: Department, Department Name, Name, Type of Hire, Start Date, Action, and Country. Two rows are visible. The first row is for Howard Wolowitz, and the second row is for Bernadette Rostenkowski. A red arrow points from a label 'Name Column' to the 'Name' column header. Another red arrow points from a label 'Link to View TBH' to the underlined name 'Bernadette Rostenkowski' in the second row.

Department	Department Name	Name	Type of Hire	Start Date	Action	Country
10330	SAS - English	<a href="#">Howard Wolowitz</a>	Employee	01/01/2013	Hire	United States
10330	SAS - English	<a href="#">Bernadette Rostenkowski</a>	Employee	04/22/2013	Hire	United States



## Dept. Approver - Review and Approval

1. Click on the “**New Hire Attachments**” link on the “**Hire Approval Page**” to open the Offer Letter and any other attached documents.

**New Hire Attachments Link**

**RUTGERS**  
Favorites | Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

**HIRE APPROVAL PAGE** [New-Hire Attachments](#) Template Sequence: 48010

**Personal Information**

Name:	Bernadette Rostenkowski	Empl ID:		Empl Rcd:	0
Address 1:	30 Rauch Ave	Social Security Nbr:	111-33-4321		
Address 2:		Date of Birth:	09/10/1970	Gender:	Unknown
City:	Theoryville	Home Phone:	848-111-9876		
State:	NJ	Postal:	87654	Mobile Phone:	
Email:	bernierw@bigbangtheory.com	Business Phone:			

**Job Information**

Hire Date:	04/22/2013	Action:	Hire	Action Reason:	New Hire		
Entry Date:	04/22/2013	Job End Date:	05/03/2013	Empl Class:	8-CoAds	Salary Grade:	Step:
Reg/Temp:	Temporary	Full/Part Time:	Full-Time	Standard Hours:	37.50		
Job Code:	99912	Job Title:	COADJUTANT-CASUAL NONTEACHING				
Department:	10330		SAS - English				
Location:	3000		Queens Building				
Supervisor ID:							
Union Code:	080	CoAdjutants:		Pay Group:	P00	Period Pay:	
Comp Freq:	A	Annual		FICA Status:	Subject	Salary Admin Plan:	N375
Rate Code:	NAANNL			Employee Type:	S	FLSA Status:	Exempt
Comp Rate:	\$1,700.000000			Tax Location Code:	NJ001	New Jersey:	

**Citizenship & Non-Resident Visa/Permit Information**

US Citizen:	Yes	Permanent US Resident:	No	Country of Residence:	USA
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## Dept. Approver - Review and Approval (continued)

- Click on the link to the right of “**Offer Letter**” in the “**Attachment Type**” area. The document will open in a new window. Repeat this step as many times as need to open other attachments.

RUTGERS

Favorites | Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

Template Based Hire Attachment

Empl ID: 10330, Empl Record: 0, Empl Name: Bernadette Rostenkowski  
Department: 10330, SAS - English  
Job Code: 99912, COADJUTANT-CASUAL NONTEACHING

Note: File name must be less than 65 characters

Attachment Type	B_Rostenkowski-Wolowitz_Offer_Letter_4_22_13.pdf	Updated By	Last Update Date/Time
1 Offer Letter	B_Rostenkowski-Wolowitz_Offer_Letter_4_22_13.pdf	WXYZ	04/22/13 2:48:59PM

OK Cancel Apply

**Attachment Type =  
Offer Letter**

**Link to Open Offer  
Letter**

## Dept. Approver - Review and Approval (continued)

- Compare the information in the Offer Letter to the data the Preparer that appears on the **“Hire Approval Page”**.

**HIRE APPROVAL PAGE** [New Hire Attachments](#) Template Sequence: 48010

**Personal Information**

Name: Bernadette Rostenkowski	Empl ID:	Empl Rcd: 0
Address 1: 30 Rauch Ave	Social Security Nbr: 111-33-4321	
Address 2:	Date of Birth: 09/10/1970	Gender: Unknown
City: Theoryville	Home Phone: 848-111-9876	
State: NJ Postal: 87654	Mobile Phone:	
Email: bernierw@bigbangtheory.com	Business Phone:	

**Job Information**

Hire Date: 04/22/2013	Action: Hire	Action Reason: New Hire	Salary Grade: Step
Entry Date: 04/22/2013	Job End Date: 05/03/2013	Empl Class: 8-CoAds	
Reg/Temp: Temporary	Full/Part Time: Full-Time	Standard Hours: 37.50	
Job Code: 99912	Job Title: COADJUTANT-CASUAL NONTEACHING		
Department: 10330	SAS - English		
Location: 3000	Queens Building		
Supervisor ID:			
Union Code: 080	CoAdjutants	Pay Group: P00	Period Pay
Comp Freq: A	Annual	FICA Status: Subject	Salary Admin Plan: N375
Rate Code: NAA/NIL		Employee Type: S	FLSA Status: Exempt
Comp Rate: \$1,700.000000		Tax Location Code: NJ001	New Jersey

**Citizenship & Non-Resident Visa/Permit Information**

US Citizen: Yes	Permanent US Resident: No	Country of Residence: USA
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**Hire Approval Page**



**RUTGERS**  
Center for Management Development

Center for Management Development  
SAS - English  
Rutgers, The State University of New Jersey  
1 Campus Way  
Piscataway, NJ 08854-8098

www.XYZ.rutgers.edu  
info@XYZ.rutgers.edu  
732-445-1234  
Fax: 732-445-5678

April 1, 2012

Re: Offer Letter

Dear Ms. Rostenkowski,

This letter confirms your assignment to facilitate the training session listed below:

Course: Scientific Writing for Non-Science Majors  
 Dates of Course: 04/22/13 through 05/03/13, 9:00 AM to 11:00 AM  
 Salary: \$1,700  
 Training Site: Campus Center  
 1 Organism Way  
 Anytown, NJ 09876  
 Department: SAS - English  
 Job Title: Coadjutant Casual Non-Teaching  
 Job Code: 99912  
 Pay Cycle Dates: Start Date - 4/22/13; End Date - 5/10/13

You will be the only instructor for this course. Please forward the completed Travel Request Form to the attention of my assistant, Rosemary New, at the above address.

**Opened Offer Letter**



## Dept. Approver - Review and Approval (continued)

- If the data is correct, click on the **"Approve"** button, to route the TBH to the next step for processing. (See Part I for details about workflows.)

If any of the data is incorrect, you are required to type a note to the Preparer into the **"Comments"** box. When done, click on the **"Return to Dept Preparer"** button to send the TBH back to the Preparer for correction.

The screenshot shows a web form with the following fields and buttons:

- Comp Rate: \$5,000.000000
- Tax Location Code
- Citizenship & Non-Resident Visa/Permit Information
- US Citizen: Yes
- Permanent US Resident: No
- Visa/Permit Type:
- Date of Entry into Country:
- Visa/Permit Status:
- Status Date:
- Comments: Siri, please chane the salary to match the amount shown in the offer letter. Thanks, Toby
- Approve
- Return to Dept Preparer

Callouts in red boxes with arrows point to:

- Comments Box**: Points to the Comments field.
- Approve Button**: Points to the Approve button.
- Return to Dept Preparer Button**: Points to the Return to Dept Preparer button.

## Dept. Approver - Review and Approval (continued)

5. If you Approved the TBH, you will see the “**Hire Approved Confirmation**” screen.



If you returned the TBH to the Preparer, you will see the “**Hire Not Approved Confirmation**” screen.



6. Click on the “**OK**” button.

## Not Approved Email

If you, the Approver, send the transaction back for changes, the system generates and sends an email to the Preparer indicating the hire was not approved. The comments you entered on the **“Hire Approval Page”** automatically appear in the body of the email.

**“Hire – Not Approved”**

**Comments entered by the Approver in HCM display in the email.**

From: [noreply@rias.rutgers.edu](mailto:noreply@rias.rutgers.edu) [mailto:[noreply@rias.rutgers.edu](mailto:noreply@rias.rutgers.edu)]  
Sent: Wednesday, April 03, 2013 3:58 PM  
To: Siri Preparer  
Subject: Hire - Not Approved

Dear Siri Preparer,

The following hire transaction was not approved. Please review the comments, make necessary changes and re-submit for approval.

Name: Eric Gablehauser  
Hire Date: 02/01/2013  
Job Title: TEACHING ASSISTANT ACD YR  
Department: 10330  
Department Name: SAS - English

Comments:  
Please change the salary to match the amount shown in the offer letter. Thanks, Toby.

[https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER\\_WORKFORCE\\_\(GBL\).HR\\_TBH\\_JOB.GBL?Page=HR\\_TBH\\_LIST&Action=U](https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).HR_TBH_JOB.GBL?Page=HR_TBH_LIST&Action=U)

Thank You,  
Toby Approver

## Changes After Approver Review

If the Approver reviews the TBH, finds errors and does not approve the transaction, the system routes it back to the Preparer for corrections. The Preparer will receive an email indicating the hire was not approved. The email contains comments from the Approver and a link to access the transaction.

**Hire Not Approved**

**Comments entered into TBH by the Approver display in the body of the email.**

**Link to TBH**

From: noreply@rias.rutgers.edu [mailto:noreply@rias.rutgers.edu]  
Sent: Wednesday, April 03, 2013 3:58 PM  
To: Siri Preparer  
Subject: Hire - Not Approved

Dear Siri Preparer,

The following hire transaction was not approved. Please review the comments, make necessary changes and re-submit for approval.

Name: Eric Gablehauser  
Hire Date: 02/01/2013  
Job Title: TEACHING ASSISTANT ACD YR  
Department: 10330  
Department Name: SAS - English

Comments:  
Please change the salary to match the amount shown in the offer letter. Thanks, Toby.

[https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER\\_WORKFORCE\\_\(GBL\).HR\\_TBH\\_JOB.GBL?Page=HR\\_TBH\\_LIST&Action=U](https://riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).HR_TBH_JOB.GBL?Page=HR_TBH_LIST&Action=U)

Thank You,  
Toby Approver



## Changes After Approver Review (continued)

You (the Preparer) can access the TBH to make changes from the link in the email or from the “**Hires in Process**” screen. (See Instructions for Preparer section for details.)

1. Open the TBH and make the required changes.
2. When done, type a note for the Approver into the “**Comments**” box indicating the changes were made.

**Comments  
entered  
Approver and  
Preparer about  
changes.**

The screenshot shows the Rutgers HR system interface for a Template-Based Hire. The page title is "Template-Based Hire" and the sub-section is "Enter Employee Information". The interface includes tabs for "National ID", "Personal Information", "Citizenship/Visa", "Job Information", and "Template Status". The "Hire Template Information" section shows "Template: Additional Coad Job" and "Effective Date: 04/22/2013". The "Employee Information" section shows "Social Security Number" and "National ID: 111334321". The "Comments" section contains two entries: "4/23/13 - Siri, please correct the Job Code. According to the offer letter, it should be 99912." and "4/24/13 - Toby, the job code was changed as requested - Siri". At the bottom, there are buttons for "Save and Submit", "Save for Later", "Cancel", and "Add Attachment". A red callout box with the text "Comments entered Approver and Preparer about changes." has a red arrow pointing to the "Comments" field.



## Changes After Approver Review (continued)

- Click on the **“Template Status”** tab. You must reset the **“Template Complete”** status. To do this, click on the blank area in the drop-down list. This activates the **“Save and Submit”** button so you can send the TBH back to the Approver for review.

The screenshot shows the 'Template-Based Hire' form in the Rutgers HR system. The form is titled 'Enter Employee Information' and includes tabs for 'National ID', 'Personal Information', 'Citizenship/Visa', 'Job Information', and 'Template Status'. The 'Template Status' tab is active, showing a dropdown menu for '\*Template Complete.' with options 'Yes', 'No', and 'Yes'. The 'Comments' field contains the text: '4/23/13 - Siri, please correct the Job Code. According to the offer letter, it should be 99912. Thanks, Toby 4/23/13 - Toby, I changed the job code as requested. - Siri'. The 'Save and Submit' button is highlighted with a red box and an arrow pointing to it from the 'Active Save and Submit Button' annotation. Other annotations include 'Template Status Tab' pointing to the 'Template Status' tab, 'Blank Area' pointing to the blank area in the dropdown menu, and 'Active Save and Submit Button' pointing to the 'Save and Submit' button.

## Changes After Approver Review

(continued)

The system generates and sends another email message to the Department Approver indicating the TBH is ready for review. The Approver and Preparer repeat the review and correction process until the hire transaction is correct and approved.

## Approver Submission

After the Department Approver approves the TBH, the system routes the request to the database, the UHR HCM unit or ALR for processing.

All TBH requests are now submitted for processing by the Department Approver (not the Preparer). Employees cannot be activated in the HCM/Payroll system or subsidiary systems without the Department Approver's approval.

## Processed Transaction

Once the TBH is approved, the system generates and sends the request to the database, the UHR HCM unit or ALR for processing. After it is processed, the system sends a final email to the Approver indicating the **“Job...has been processed”** or the **“Job and Contract...has been processed”**. This signifies the end of the Template-Based Hire process.

**Job and  
Contract  
Processed**

To: Tory Approver  
Cc: HCM Manager; Siri Preparer  
Subject: Job and Contract for Bernadette Rostenkowski, 00047618-0 has been processed

Dear Tory Approver

The job and contract for Bernadette Rostenkowski, 00047618-0 has been processed. The Contract starts on 2013-04-22 and ends on 2013-05-03. Please proceed to the Department Budget table to setup the assignment level charging instructions, if applicable.

If you wish to view job information again, you can access the job and contract summary screen through this link:

[https://ptest1-riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER\\_WORKFORCE\\_\(GBL\).JOB\\_DATA.GBL?Page=RU\\_CURR\\_JOB\\_SUMM&Action=C&EMPLID=00047618&EMPL\\_RCD=0](https://ptest1-riashrms.rutgers.edu/psp/HRMS1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).JOB_DATA.GBL?Page=RU_CURR_JOB_SUMM&Action=C&EMPLID=00047618&EMPL_RCD=0)

Thank you,  
University Human Resources



**FYI**

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University Human Resources

## Automated Contract Creation

A process called the “PeopleSoft Contract” starts and stops pay for Period Pay positions (Classes 6, 7, 8, and 9). PeopleSoft contracts are automatically created by the system after the hire is processed by HCM or sent directly to the database. The contract is automatically generated from the data that was entered into the TBH transaction by the Preparer.

## Checking TBH Status

Preparers, you can check the status of hire transaction you submitted by navigating to the **“Template Hire Status”** screen. It displays pending, cancelled and processed TBHs.

The screenshot shows the 'Template Hire Status' page with three main sections: Pending Hires, Cancelled Hires, and Processed Hires. Red callout boxes provide additional context:

- Navigation:** Points to the breadcrumb trail: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire Status.
- Pending Hires:** Points to the table of pending hires.
- Cancelled Hires:** Points to the 'Cancelled Hires' section, which states 'You do not have any cancelled hires.'
- Processed Hires:** Points to the 'Processed Hires' table.
- Dept Approver has to approve:** Points to the 'Status' column in the Pending Hires table, specifically to 'Pending Dept Approval'.
- “Requested” or “Action Required” (not shown) means HCM or ALR has to process:** Points to the 'Status' column in the Pending Hires table, specifically to 'Requested'.

Name	Type of Hire	Start Date	Action	Country	Status	Person ID
Stephanie Barnett	Employee	04/10/2013	Hire	United States	Pending Dept Approval	NEW
Sheldon Cooper	Employee	04/09/2013	Hire	United States	Pending Dept Approval	NEW
Alex Jensen	Employee	02/01/2013	Hire	United States	Requested	NEW
Dennis Kim	Employee	07/01/2013	Hire	United States	Requested	NEW
Elizabeth Plimpton	Employee	04/02/2013	Hire	United States	Pending Dept Approval	NEW

Select	Name	Type of Hire	Start Date	Action	Country	Person ID
<input type="checkbox"/>	Angela Paige	Employee	04/15/2013	Hire	United States	00047625
<input type="checkbox"/>	David Underhill	Employee	04/05/2013	Hire	United States	00047623



## Updating National ID (SSN)

### For Existing Employees Already Active in HCM/Payroll System

When an employee who applied for an SSN receives one, you must fax an enlarged, readable copy of the card to your HCM Specialist and include the following information in the fax cover sheet:

- Preparer's Name
- Preparer's Contact Information
- Employee's Name (as it appears in HCM)
- Employee's ID Number (as it appears in HCM)
- Purpose of Fax (e.g., "Please update the Social Security Number for employee ...")

In addition, you should call or email your HCM Specialist so they can be on the lookout for the fax. Your HCM Specialist updates the SSN in HCM.

**Live  
Demonstration**



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University Human Resources

## Demonstration

The instructor will now walk through the process of creating and submitting a Template-Based Hire in the HCM system.

[Demo](#)

**Please Note:** The link above is for UHR use only. It does not access the production HCM environment. Please do not attempt to log into the system via this link.

## **Additional Resources**

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University Human Resources

## Additional Assistance

### HCM Unit:

- Hotline: 848-932-3888
- Fax: 732-932-0046
- E-mail: [hcm\\_action\\_status@hr.rutgers.edu](mailto:hcm_action_status@hr.rutgers.edu)
- UHR HCM Unit Website:  
<http://uhr.rutgers.edu/uhr-units-offices/human-capital-management-hcm>
- HCM Blog: <http://hcmblog.rutgers.edu/>

See the “Instructional Materials for HCM Users” heading for additional training materials, including sample role-specific TBH instruction documents (e.g., “Class 9 Fellows Template-Based Hire Instructions for HR Preparers”).

## Additional Assistance

(continued)

### Office of Academic Labor Relations:

- Phone: 848-932-7174
- Website: <http://academiclaborrelations.rutgers.edu>

### Payroll Services:

- Phone: 848-445-3007
- Website: <http://payroll.rutgers.edu/>

## Questions & Answers

Thank you for your participation.