

# TEMPLATE-BASED HIRE INSTRUCTIONS - HR PREPARERS

## TEMPLATE: CLASS1\_REGULAR (STAFF)

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.).

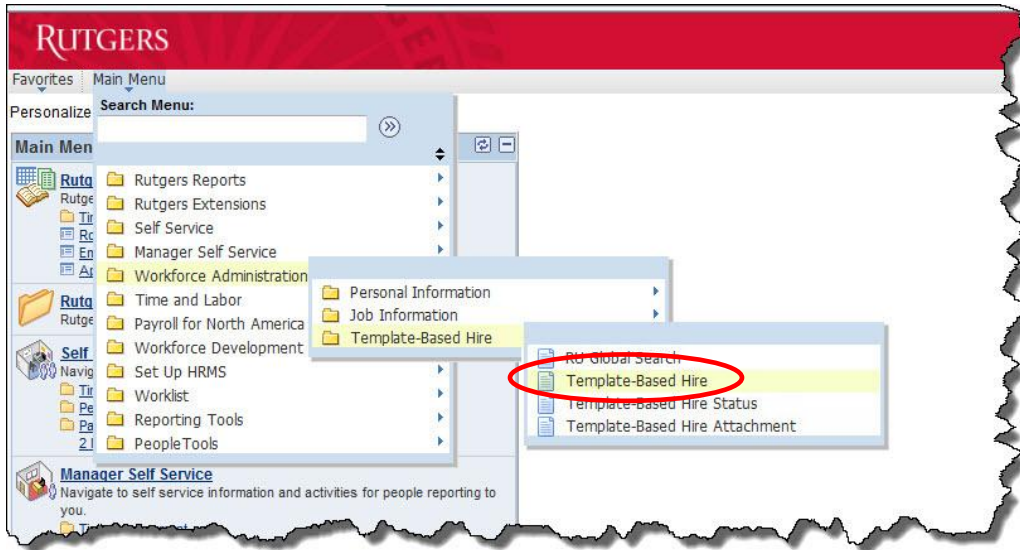
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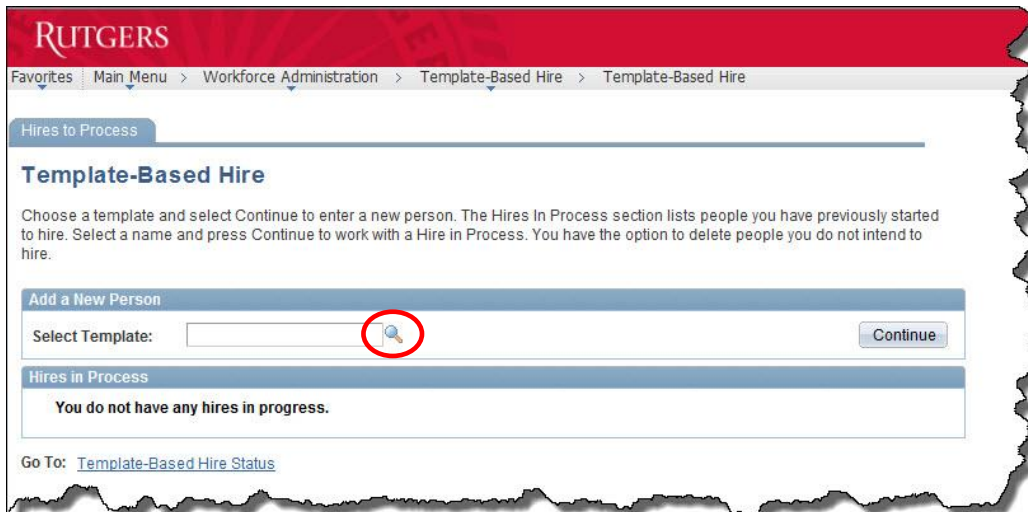
### Step-by-Step Instructions:

#### Navigation:

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



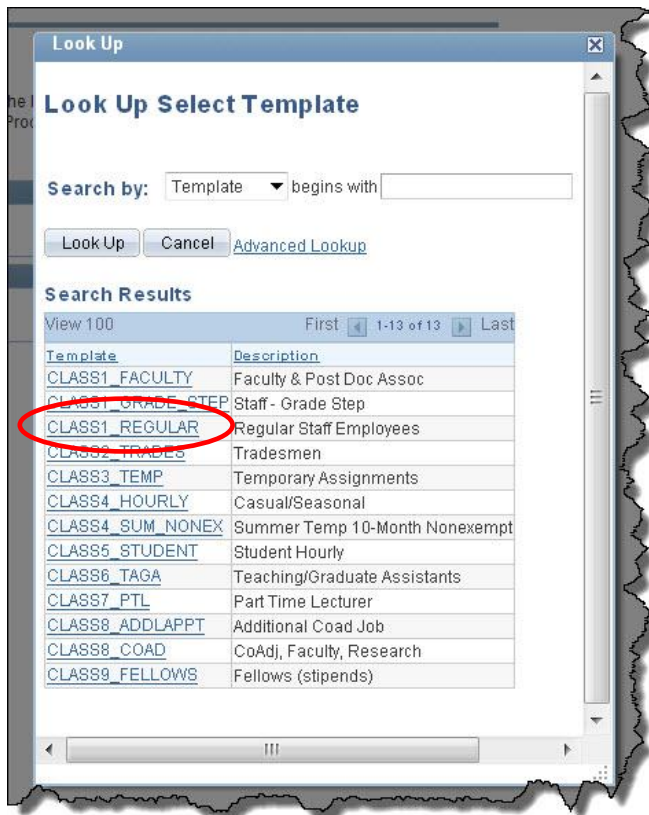
**Step 1:** Click on the “” icon next to the “Select Template” field.



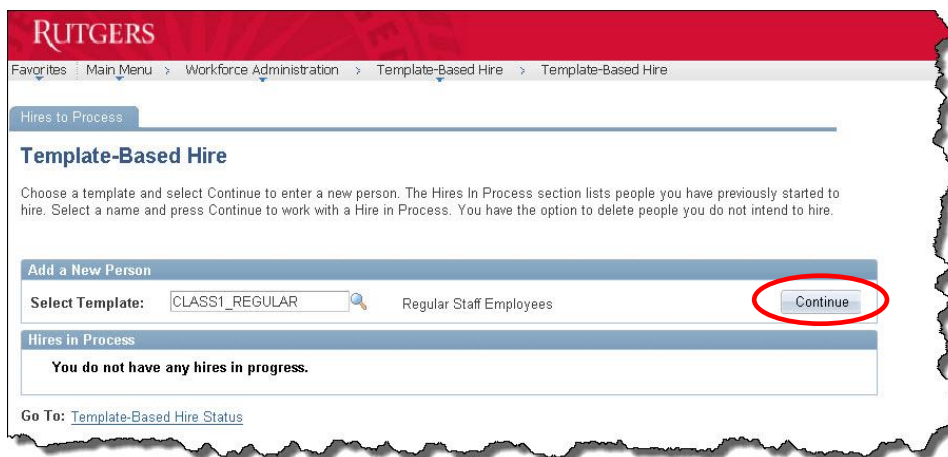
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**Step 2:** Scroll to the bottom of the “Look Up Select Template” list and click on the “CLASS1\_REGULAR” link in the “Template” column.




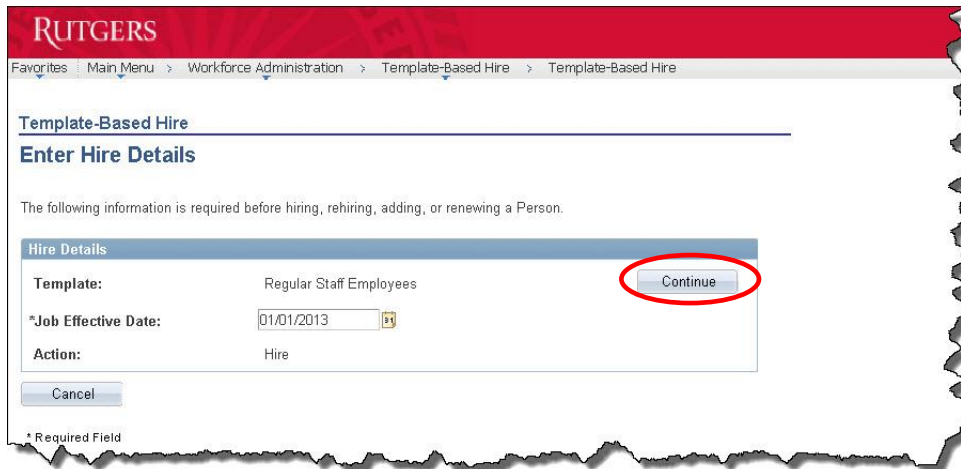
**Step 3:** Click on the “Continue” button.



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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.




RUTGERS

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

### Template-Based Hire

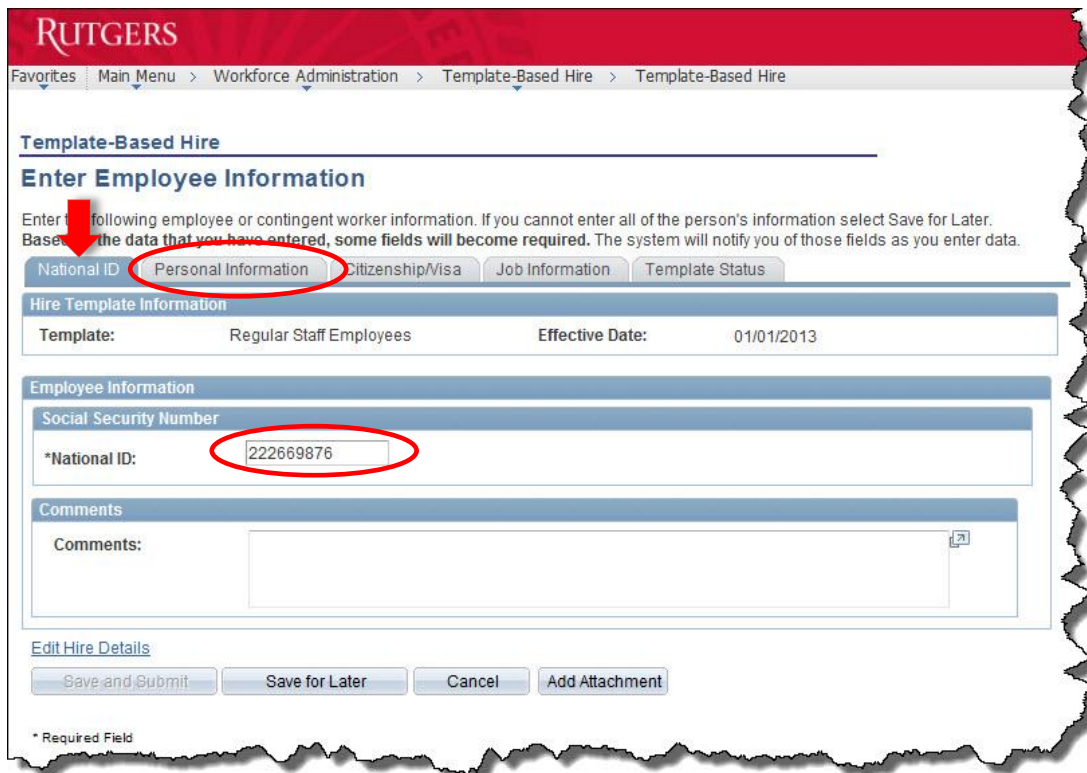
#### Enter Hire Details

The following information is required before hiring, rehiring, adding, or renewing a Person.

Hire Details	
Template:	Regular Staff Employees
*Job Effective Date:	01/01/2013 
Action:	Hire

\* Required Field

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



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.

Hire Template Information	
Template:	Regular Staff Employees
Effective Date:	01/01/2013

Employee Information	
Social Security Number	
*National ID:	222669876
Comments	
Comments:	<input type="text"/>

[Edit Hire Details](#)

\* Required Field

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

*Note:* 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.

**RUTGERS**  
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: Regular Staff Employees      Effective Date: 01/01/2013

#### Employee Information

**National ID**  
National ID: 222-66-9876

**Primary Name - English**  
Name Prefix:   
\*First Name: Howard  
Middle Name:   
\*Last Name: Wolowitz  
Name Suffix:

**Birth Information**  
\*Date of Birth: 04/28/1972

**Person Gender**  
\*Gender: Male

**Person Address 01 - United States**  
Address Type: Home  
\*Address Line 1: 231 North Los Robles Ave.  
Address Line 2:   
\*City: Pasadena  
\*State: NJ  
\*Postal Code: 87654  
County:

**Person Phone Number 01**  
Phone Type: Home      Telephone: 848-999-6543

**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: hw\_aero@bbt.com


**Comments**  
Comments:

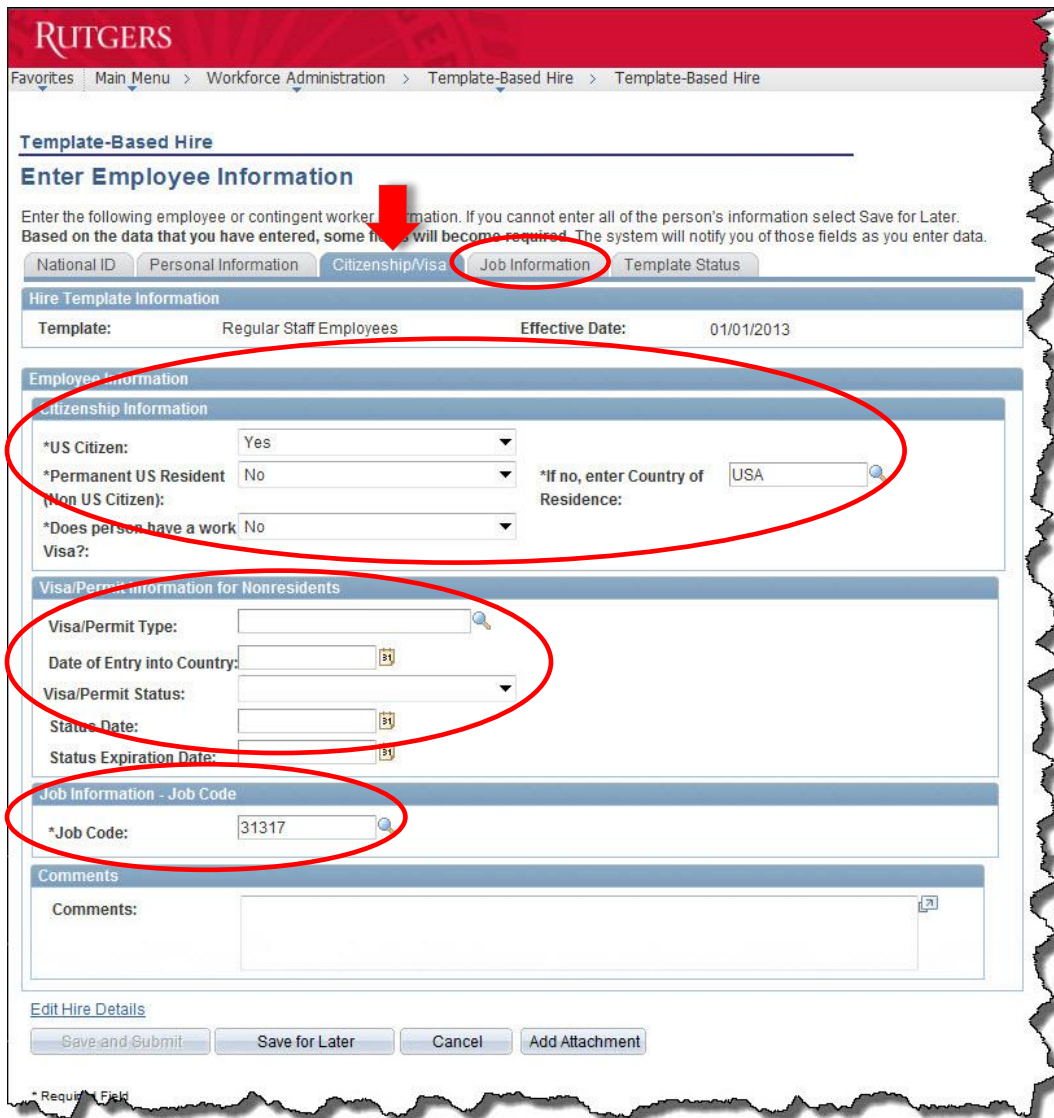
[Edit Hire Details](#)

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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.



**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: Regular Staff Employees      Effective Date: 01/01/2013

**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

**Visa/Permit Information for Nonresidents**

Visa/Permit Type:  
Date of Entry into Country:  
Visa/Permit Status:  
Status Date:  
Status Expiration Date:

**Job Information - Job Code**

\*Job Code: 31317

**Comments**

Comments:

[Edit Hire Details](#)

Save and Submit | Save for Later | Cancel | Add Attachment

\* Required Field

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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.

**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: Regular Staff Employees      Effective Date: 01/01/2013

**Employee Information**

**Job Code Information**

Job Code: 31317      Description: DIR OF DEVELOPMENT  
Standard Hours: 37.500000      FLSA Status: Exempt  
Union Code: 006

**Work Location - Position Data**

Position Entry Date: 01/01/2013

**Work Location - Expected Job End Date**

Expected Job End Date:

**Work Location - Job Fields**

\*Department: 10330      \*Location Code: 3000 005

**Job Information - Reporting Information**

Supervisor ID:

**Job Information - Status**

Full/Part Time: Full-Time

If part-time, input standard hours reduced proportionate to part time %.

\*Standard Hours: 37.500000

**Job - Payroll Information**

\*Pay Group: S01      Employee Type: S  
\*Tax Location Code: NJ001

**Job Compensation - Pay Components**

\*Compensation Rate: 65321.000000

**Job Attachment Required**

\*Job Attachment Exists: Yes

**Comments**

Comments:

Edit Hire Details

Save and Submit      **Save for Later**      Cancel      **Add Attachment**



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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.

The screenshot shows the Rutgers HR system search interface. The page title is "RUTGERS" and the breadcrumb trail is "Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire Attach". Below the breadcrumb trail is a "Find an Existing Value" button. The search criteria section includes a "Maximum number of rows to return (up to 300):" field set to "300". The search criteria fields are: "Template Sequence:" (dropdown menu), "Empl ID:" (dropdown menu set to "begins with"), "Empl Record:" (dropdown menu), "Name:" (dropdown menu set to "begins with"), "Department ID:" (dropdown menu), "Department:" (dropdown menu set to "begins with"), "User ID:" (dropdown menu set to "begins with" and text input "WXYZ"), "Entered From:" (dropdown menu set to ">=" and date input "02/26/2013"), and "Entered Until:" (dropdown menu set to "<=" and date input "03/28/2013"). There is a "Case Sensitive" checkbox. At the bottom of the search criteria section, the "Search" button is circled in red, along with "Clear", "Basic Search", and "Save Search Criteria" buttons.

The screenshot shows the Rutgers HR system search interface with search results. The page title is "RUTGERS" and the breadcrumb trail is "Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire Attach". Below the breadcrumb trail is a "Find an Existing Value" button. The search criteria section is identical to the previous screenshot. Below the search criteria section, the "Search Results" section is visible. It includes a "View All" link and a table with the following columns: "Template Sequence", "Empl ID", "Empl Record", "Name", "Department ID", and "Department". The table contains the following data:

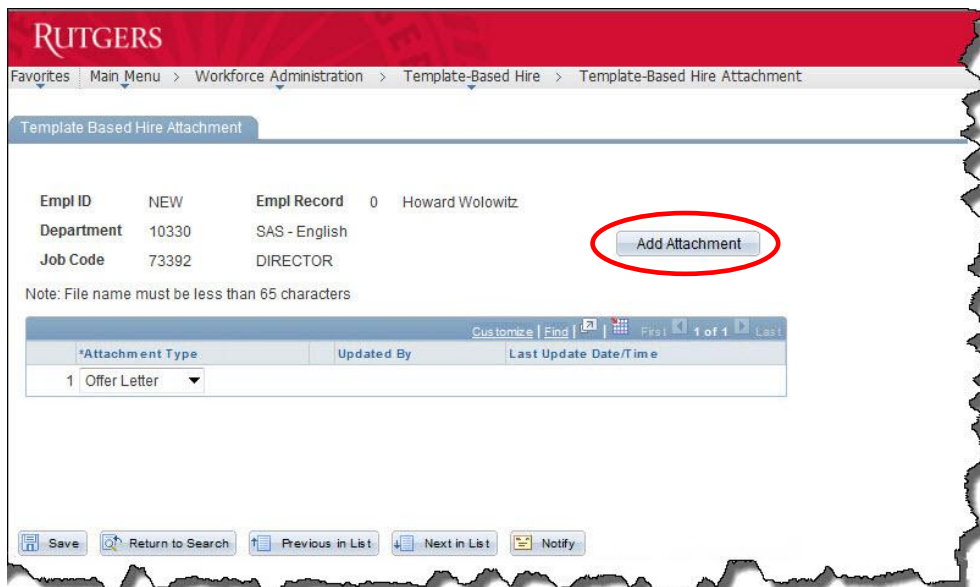
Template Sequence	Empl ID	Empl Record	Name	Department ID	Department
47983	NEW	0	Howard Wolowitz	10330	SAS - English
48001	NEW	0	Howard Wolowitz	10330	SAS - English
47983	NEW	0	Howard Wolowitz	10331	Writing Progra

The name "Howard Wolowitz" in the first row of the table is circled in red.

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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.



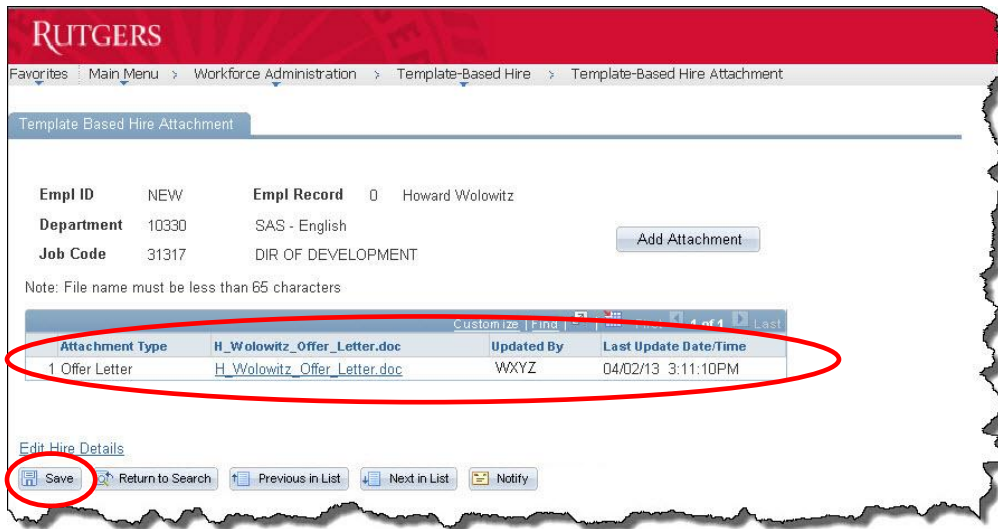
**Step 11:** Click on the “Browse” button, locate the Offer Letter on your computer, and click on the file name to select it. When finished, click on the “Upload” button.



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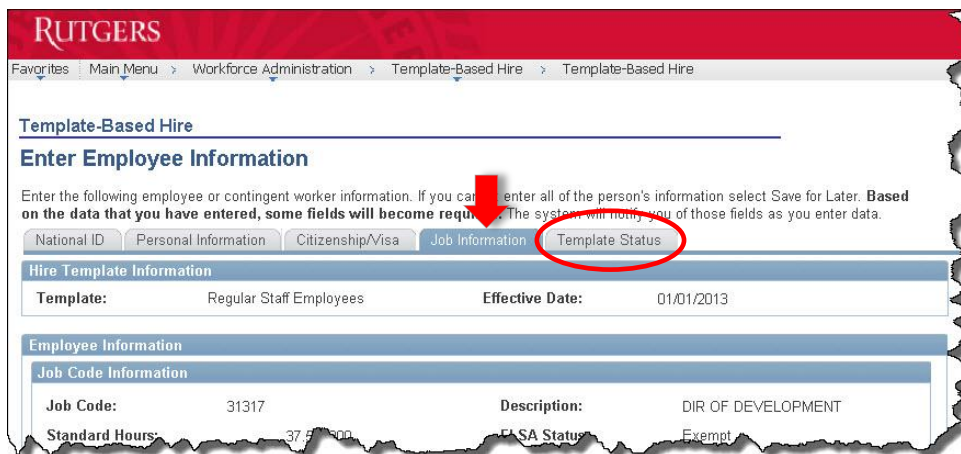
**Step 12:** The name of the document you uploaded displays in the “Offer\_Letter.doc” column. The date and time you uploaded it also appears in the “Last Update Date/Time” column. Make sure “Offer Letter” appears in the “Attachment Type” column. If not, click on the “▼” icon and select it. When finished,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

The screenshot shows the Rutgers HR system interface for entering employee information. The breadcrumb trail is: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The page title is "Template-Based Hire". Below the title is the section "Enter Employee Information". A message states: "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 four tabs: National ID, Personal Information, Citizenship/Visa, Job Information, and Template Status. The "Hire Template Information" section shows "Template: Regular Staff Employees" and "Effective Date: 01/01/2013". The "Employee Information" section has a "Template Status" dropdown set to "Yes", which is circled in red. Below it is a "Comments" text area, also circled in red. At the bottom, there are buttons: "Save and Submit" (circled in red), "Save for Later", "Cancel", and "Add Attachment".

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

The screenshot shows the "Submit Confirmation" screen in the Rutgers HR system. The breadcrumb trail is: Favorites | Main Menu > Workforce Administration > Template-Based Hire > Template-Based Hire. The page title is "Submit Confirmation". A message with a checkmark icon states: "The submit was successful and has been sent to the appropriate department Approver for review. Go To the Template-Based Hire Status page to review the status of this person." At the bottom left, there is an "OK" button.

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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.