[External Hire]
Hiring With a Position and With eRecruit

This guide is used to hire an employee using the PeopleSoft system when there is a position number attached to the hire and the hire has used eRecruit to make an application. This means some applicant information and job data will default from the system. To learn more attend the "eRecruit II: Completing Hires in PeopleSoft" hands-on workshop.

NOTES
Before Beginning
- All hire pages must be completed together; no “Save for Later” function is available
- Supplemental materials needed to complete the “Hire” job action: Hire Checklist, Time and Labor Enrollment Matrix, Hiring Matrix, and FTE Match with Standard Hours (available under “Forms” and “Additional Resources” at http://www.bridges.ufl.edu/hiring).
- Tasks to complete the hire include:
  - Complete a health assessment, if necessary, and obtain results
  - Ensure appropriate paperwork has been completed per the hire “checklist”
  - Enter hire data into PeopleSoft following the steps below
  - Initiate workflow upon completing the “Hire” job action
  - Submit a completed packet to the appropriate Level 2 office
  - Set up payroll distribution after Level 2 approval of the “Hire” job action (attend “Distributions/Additional Pay” training for details)

To Complete the Checklist
- Access the checklist forms at UF Bridges (site noted above)
- Select the checklist needed for the type of hire you are completing and print that page
- Per the checklist, attach all required forms for review by your Level 1 Approver
- Forward forms to Level 2 Approver from Level 1 Approver
- Forms must be received and hire approved by Level 2 for hire completion to be possible

To Complete the Hire
- Navigate across hyperlinks located at the bottom of each screen, then across the tabs (for each hyperlink) located left to right at the top of each screen
  - Click each hyperlink located at the bottom of each screen
  - Then click and complete all pages associated with that hyperlink, per these instructions
  - The pages are found as tabs at the top of the screen or as links at bottom of screen

PROCESS
- Log on to myUFL using your GatorLink username and password (http://my.ufl.edu)
- Navigate to Recruiting > Hire Applicants > Hire
- At the “Hire” screen, identify selected candidate by entering his or her name, entering his or her “Applicant ID,” or locating the “Applicant ID” using the look-up feature. Click “Search”
  - Click name of applicant
    - Next click “Add”
- Review candidate matches presented, if any
  - If match is found, identify in listing and click on “Select”
  - If no match is found in listing, click on “Continue”
Link 1: Personal Data

- **Tab: Name History**
  - Change “Effective Date” to date of hire

- **Tab: Address History**
  - Address Type: Home
  - Address History
    - Change “Effective Date” to date of hire
    - Review Address
    - To make needed changes, click “Edit Address” and enter changes
  - Click the Plus sign (+) associated with Address Type (not Address History)
  - Address Type: Select “Work” from drop-down menu
  - Address History:
    - Change “Effective Date” to date of hire
    - Click “Edit Address” and enter work address, then click “OK”
  - Home and work addresses are minimum requirements to enter—other addresses are optional
  - Verify home phone; change if needed
  - Email addresses are optional

- **Tab: Personal History**
  - Change “Effective Date” to Date of Hire
  - Select “Gender” based on W-4 information
  - Select “Highest Educational Level”
  - Select “Marital status” to agree with W-4 information
  - Click USA flag and select appropriate “Military Status”

- **Tab: Identity/Diversity**
  - Enter “Date of Birth,” if not defaulted
  - Enter “Social Security Number,” if not defaulted
  - Click on USA Flag
    - Select “Ethnic Group” to agree with W-4
    - Move to right of screen and make sure “Primary” box is checked

Link 2: Job Data

- **Tab: Work Location**
  - “Effective Date” is defaulted
  - In the two fields associated with “Action/Reason,” leave “Action” default as “Hire”
  - Select “Hire w/Recruitment” for “Reason,” in smaller field to the right, using associated magnifying glass view icon
  - “Position Number” should be defaulted
  - Select “Work County” at bottom of screen from look-up (where employee works—not lives)

- **Tab: Job Information**
  - Select “Employee Class” from Hiring Matrix

- **Skip the Job Labor Tab**

- **Tab: Payroll**
  - Pay Group: “Pending” is defaulted and grey; only Level 2 approver can change
  - Employee Type: Select “Employee Type” of “Exception Hourly” or “Hourly”
  - Tax Location Code: Select
  - Holiday Schedule: Use look-up to select “Holiday Schedule” based on Hiring Matrix
  - FICA Status: Select from look-up (typically, “Subject”)

- **Tab: Salary Plan**
  - All fields on this page are defaulted
Tab: Compensation
- Click on “Default Pay Components” yellow button in middle of screen
- Under Pay components header, view “North American Annual” or “North American Hourly”
- Under Compensation header (above Pay Components), enter “Frequency” from Hiring Matrix
- Go back to Pay components header and enter salary under “Comp Rate” (annual salary for exempt employee and hourly rate for non-exempt employees)
- Click “Calculate Compensation” yellow action button
- Click on “Employment Data” hyperlink

Link 3: Employment Data
Tab: Employment Information
- Click on “Time Reporter Data” Hyperlink
- Enter date of hire for “Payable Time Start Date” and “Effective Date”
- Use Time and Labor Enrollment Matrix to choose “Time Reporter Type” and then select “Time Reporting Template” from look-up
- Use Time & Labor Enrollment Matrix to select “Time Period ID”, “Workgroup”, and “Taskgroup”
- Click on “OK”
- Skip “Earnings Distribution” Hyperlink—this functionality is provided elsewhere
- Click “Benefits Program Participation” Hyperlink

Link 4: Benefits Program Participation
- “Effective Date” should be date of hire
- Use Hiring Matrix to select “Benefit Program” from look-up
- Click “Save to complete data entry for hire job action

NEXT STEPS
- Initiate workflow found at Workforce Administration > UF HR Approve Job > UF HR Approve Job
- Completed packet must be received by Level 2 for the hire to be approved
- Once Approved, set up payroll distribution