Hiring With a Position and Without eRecruit

This function is used to hire an employee, including both faculty and staff, using the PeopleSoft system when there is a position number attached to the hire, but the hire has not used eRecruit to make an application. This means applicant data will not default from the system, but most job data will default. 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

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, then across the tabs for each hyperlink
- 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 (http://my.ufl.edu) using your GatorLink username and password
- Navigate to Workforce Administration > Increase Workforce > UF Hire Employee

UF Hire Employee Hyperlinks, Pages, and Data Entry Fields
- Specify Employee Page
  - First Name, Middle Name, and Last Name: Enter as appears on Social Security Card
  - Date of Birth: Enter
  - SSN: Enter (Tax Identification Number may be used temporarily for foreign nationals)
  - Confirm SSN: Reenter SSN
  - Click on “Add” button to begin UF Directory Search
  - If no match is found, the system will take you to the “Name History” page
  - A listing of potential matches may appear
    - Review the matches in the listing
    - If match is found, identify in listing and click on “Select”
    - If no match is found in listing, click on “Continue”
    - Students should always have a UF Directory match

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Personal Data Hyperlink - Name History Page
- Type of Name: Leave "Primary" defaulted
- Effective Date: Change to Date of Hire
- Name fields: Review defaulted information
- Prefix and Suffix: Use drop-downs to add appropriate information
- Click on “Refresh the Name” button
- Empl ID: Make note of the Employee ID for your later reference
- Click on “Address History” page tab

Address History Page
- Address Type: Leave “Home” selected
- Effective Date: Change to Date of Hire
- Address: If information is defaulted, check for accuracy
- Click on “Edit Address” link
- Additionally, for hires on a Visa status
  - Country: Change
  - For “Home” address, enter address in home country, not USA
  - Add “Mail” Address Type to enter local address

Edit Address Page
- Address 1: Enter Home Address (required entry)
- City: Enter name of city
- Postal: Enter Zip Code
- County: Look up (or type using all capital letters)
- State: Look up (or type using all capital letters)
- Click on “OK”

Address History Page
- To move to next address entry, click on the blue arrow next to “1 of 2” at top of page OR click the upper plus sign (+) associated with Address Type (not Address History)
- Address Type: Select “Work”
- Effective Date: Change to Date of Hire
- Click on “Edit Address” link

Edit Address Page
- Address 1: Enter Work Mailing Address (required entry)
- City: Enter name of city
- Postal: Enter Zip Code
- County: Look up (or type using all capital letters)
- State: Look up (or type using all capital letters)
- Click on “OK”

Address History Page
- You may view address entries by clicking on “View All” at the upper right corner of screen
- Phones: Select “Phone Type” and Enter “Telephone” number
  - Use the plus sign to add more “Phone Type” and “Telephone” number entries
- Email Addresses (optional entry): Select “Email Type” and enter “Email Address”
  - Use the plus sign to add more “Email Type” and “Email Address” entries
- Click on “Personal History” page tab

Personal History Page
- Effective Date: Change to Date of Hire
- Gender: Select to agree with W-4
- Highest Educational Level: Select
- Marital Status: Select to agree with W-4
  - As of: Ignore
- USA Flag: Click on
  - Select Military Status
- Click on “Identity/Diversity” page tab
- **Identity/Diversity Page**
  - Date of Birth: Defaulted; if not, enter DOB
  - Referral Source: Disregard this section
  - National ID: Defaulted; if not, enter Social Security Number
  - USA Flag: Click on
    - Select “Ethnic Group” to agree with W-4
    - Move to right of page and make sure “Primary” box is checked
  - Click on “Job Data” hyperlink

- **Job Data Hyperlink – Work Location Page**
  - Effective Date: Information defaulted
  - Action: Leave default as “Hire”
  - Reason: Select “Hire w/Recruitment” from look-up
  - Position Number: Should be defaulted
  - Work County: Select from look-up (Remember to select “work” county, not county of residence)
  - Click on “Job Information” page

- **Job Information Page**
  - Employee Class: Select from Hiring Matrix
  - Click on “Payroll” page; Skip **Job Labor Page** (not used)

- **Payroll Page**
  - Pay Group: “Pending” is defaulted and grey; only Level 2 approver can change
  - Employee Type: Use Hiring Matrix and select either “Exception Hourly” or “Hourly”
  - Tax Location Code: Retain default
  - Holiday Schedule: Use Hiring Matrix and select from look-up
  - FICA Status: Select from look-up (typically, “Subject”)
  - Click on “Compensation” page tab; Skip **Salary Plan Page** (all fields defaulted)

- **Compensation Page**
  - Click on “Default Pay Components” button
  - Rate Code: View as North American Annual or North American Hourly
  - Frequency (lower right screen under Pay Components header): View
  - Frequency (upper right screen above Pay Components header): Use Hiring Matrix and select from look-up
  - Compensation Rate (under Pay Components header): Enter annual salary, if exempt OR hourly salary, if non-exempt
  - Click on “Calculate Compensation” button (hourly or biweekly rates appear at top of page)
  - Click on “Employment Data” hyperlink

- **Employment Data Hyperlink – Employment Information Page**
  - Click on “Time Reporter Data” link

- **Time and Labor Data Page**
  - Payable Time Start Date: Enter Date of Hire
  - Effective Date: Enter Date of Hire
  - Reporter Type: Use Time and Labor Enrollment Matrix to select
  - Time Reporting Template: Use Time and Labor Enrollment Matrix to select from look-up
  - Time Period ID: Use Time and Labor Enrollment Matrix to select
  - Workgroup: Use Time and Labor Enrollment Matrix to select
  - Taskgroup: Use Time and Labor Enrollment Matrix to select
  - Click on “OK”
  - Click on “Benefits Program Participation” Hyperlink

- **Benefits Program Participation Hyperlink – Benefit Program Participation Page**
  - Make no changes here
Best Practices: Initiation of Workflow
- Make sure all checklist documentation is complete and ready for presentation to the Level 2 Approver
- Be a communication facilitator. Have appropriate conversations and communications with members of your department and with central office staff prior to the hire.
- Check on the progress of the approval for your hire by navigating as if to initiate workflow. Review the status chart to locate where the workflow is currently. Also read the notes for information on any special items concerning the approval.

To Initiate Workflow:
- Go to UF HR Approve Job by navigating through the menu
  ▶ Workforce Administration > UF HR Approve Job > UF HR Approve Job

Notes: Initiation of Workflow
- Find An Existing Value Page
  ▶ Enter the Employee ID or use other search keys
  ▶ Click on “Search”
  ▶ Select your hire from matches listed

- UF HR Approval Page
  ▶ Approve: Leave on
  ▶ Other Information: Leave any needed notes for approvers
  ▶ Click on “Save”

- Standard Error Message Page
  ▶ Read for impact
  ▶ Click on “OK”
  ▶ Workflow is now initiated to Level 1 Approver
  ▶ Level 1 Approver action
    ▶ If “Approved” – Workflow is sent to Level 2 Approver
    ▶ If “Recycled” – Workflow is returned to you
    ▶ If “Denied” – Workflow and hire process are ended completely

To Set Up Payroll Distribution:
- Obtain both Level 1 and Level 2 approval before entering payroll distribution
- Attend “Distributions/Additional Pay” training for detail