Hiring Courtesy Faculty

This function is used to hire (appoint) a Courtesy Faculty member in the PeopleSoft system. **This process can also be used for Assign Additional Job for individuals already employed by UF who are receiving a courtesy appointment.**

### 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 and Hiring Matrix (available under “Forms” and “Additional Resources” at [http://www.bridges.ufl.edu/hiring](http://www.bridges.ufl.edu/hiring)).
  - 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 Academic Personnel Office

### To Complete the Checklist
- Access the checklist forms at UF Bridges (site noted above)
- Select the Courtesy Faculty Checklist and print that page
- Per the checklist, attach all required forms for initial review by your Level 1 Approver
- After Level 1 approval, forms should be forwarded to the Academic Personnel Office (Level 2 Approver)
- Forms must be received and hire approved by Level 2 for hire completion to be possible in the system

### To Complete the Hire
- Navigate across hyperlinks, then across the tabs for each hyperlink
  - Click on each designated hyperlink located at the bottom of the screens
  - Then click and complete 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

### The Process
- Log into the system via the myUFL portal, using your GatorLink user ID and password ([http://my.ufl.edu](http://my.ufl.edu))
- Go to Hire Employee by navigating through the menu
  - 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”
    ▶ This will cause some data to be auto populated from the UF Directory on later pages
  ▶ When viewing auto populated data, review that it is current and edit, if necessary
  ▶ If no match is found in listing, click on “Continue”

**Personal Data Hyperlink - Name History Page**
  ▶ Type of Name: Leave “Primary” defaulted
  ▶ Effective Date: Change to beginning date of Courtesy appointment
  ▶ 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 (”Home” entry is optional, but recommended)
  ▶ Effective Date: Change to beginning date of Courtesy appointment
  ▶ 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 or update Home Address (optional 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
  ▶ Address Type: Select “BUSN”
  ▶ Effective Date: Change to beginning date of Courtesy appointment
  ▶ Click on “Edit Address” link

**Edit Address Page**
  ▶ Address 1: Enter Business Mailing Address (required entry – normally the PO Box or the department granting the courtesy appointment)
  ▶ 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 beginning date of Courtesy appointment
- Gender: Select
- Highest Educational Level: Select
- Marital Status: Select, if known
  - As of: Ignore
- Click on “Identity/Diversity” page tab

**Identity/Diversity Page**
- Date of Birth: Defaulted (from Specify Employee page entry)
- Referral Source: Disregard this section
- National ID: Defaulted (from Specify Employee page entry)
- USA Flag: Click on
  - Select “Ethnic Group”
  - Move to right of screen 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 Courtesy Faculty” from look-up
- Position Number: Leave blank
- Department: Select
- Location: Defaulted (from Department entry)
- Work County: Select from look-up (Remember to select “work” county, not county of residence)
- Click on “Job Information” page

**Job Information Page**
- Job Code: Select
  - Use the Job Code Abbreviations to help narrow the search for Courtesy titles
- Regular/Temporary: Select “Regular”
- Employee Class: Select “Regular” (from Hiring Matrix)
- Work Period: Accept default
- Standard Hours: Accept default
- **Skip Job Labor Page** (not used)
- Click on Payroll Page

**Payroll Page**
- Pay Group: “Pending” is defaulted and grey; only Level 2 approver can change
- Employee Type: Select “Exception Hourly” (from Hiring Matrix)
- Tax Location Code: Retain default or select
- Holiday Schedule: Leave as is
- FICA Status: Leave as is
- Click on Salary Plan Page

**Salary Plan Page**
- Salary Administration Plan: Select “CTSY”
- **Skip Compensation Page** (not used)
- **Skip Employment Data Hyperlink and associated pages** (not used)
Click on “Benefits Program Participation” Hyperlink

**Benefits Program Participation Hyperlink – Benefit Program Participation Page**
- Effective Date: Should be Date of Courtesy appointment
- Benefit Program: Select “NON” (from Hiring Matrix)
- Click on “Save”

**Standard Error Message Page**
- Read for impact
- Click on “OK”
- UF Hire Employee function is now completed

**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 the Academic Personnel Office prior to the appointment. The request for approval should not be a “surprise” to the Level 1 and Level 2 approvers.
- 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.

**Go to UF HR Approve Job by navigating through the menu**
- Workforce Administration
  - UF HR Approve Job
    - UF HR Approve Job

**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