This function is used to hire an OPS employee using the PeopleSoft system when there is no position number attached to the hire, but the hire has used eRecruit to make an application. This means some applicant data will default from the system, but most job data will not default. Hiring processes include completion of the hire checklist, the entry of information for the hire, and the initiation of workflow for approval of the hire.

NOTES

Before Beginning

- All hire pages must be completed together; the “Save for Later” functions are not available.
- Supplemental materials (available under “Forms” and Additional Resources” at http://www.bridges.ufl.edu/hiring) needed to complete the “Hire” job action: OPS Hiring Checklist, Hiring Matrix, Time and Labor Enrollment Matrix, and FTE—Work Hours Crosswalk.
- Tasks to complete the hire include:
  - Complete a health assessment, if necessary, and obtain results.
  - If needed, locate the OPS Health Assessment form at http://www.ehs.ufl.edu/OCCMED/inopannf.htm.
  - Ensure appropriate paperwork has been completed per the hire “checklist”.
  - If hiring for an OPS position that was posted via eRecruit, establish acceptance of the candidate for hire (Skip this task if the position was not posted via eRecruit.).
  - 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.
- Most information is entered sequentially through hyperlinks and pages. The exception to sequential entry occurs when beginning the Job Information page, then proceeding to the Salary Plan page, and then returning to the Job Information page. Information must be entered on these pages in this order. If not, system defaults will occur which will result in the hire being paid incorrectly. Be sure to follow the information entry on these pages in the order directed.

PROCESS

- Log on to myUFL (http://my.ufl.edu) using your GatorLink username and password.

Establish Candidate Acceptance (If position posted via eRecruit)

- Navigate to Manager Self Service > Manage Recruiting Activities Home.
- Under “Applicants,” select “Track Applicant Activity.”
Choose requisition number from drop-down
Click on “New Search”
Select desired candidate (click on name)
In the “offers” tab, choose “Accept” for status
Save --> Now ready for “Hire”

Navigation for Hiring
- Navigate to Recruiting>Hire Applicants>Hire

Hire Hyperlinks, Pages, and Data Entry Fields
- 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, select from listing and click “Select”
- If no match is found, click “Continue”
- Students should always have a UF Directory match

Personal Data Hyperlink - Name History Page
- Effective Date: Change to Date of Hire
- 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: Check defaulted information for accuracy (Use “Edit Address” to make changes.)
  - 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
- Click on the blue arrow next to “1 of 2” at top of page to move to next address entry OR
- Click the upper plus sign (+) associated with Address Type (not Address History)

Address History Page
- 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: Verify home phone and change, if needed
  - 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: Information defaulted or enter
  - Referral Source: Disregard this section
  - National ID: Social Security Number defaulted or enter
  - USA Flag: Click on
    - Select “Ethnic Group” to agree with W-4
    - Move to right of screen and make sure “Primary” box is checked
  - Click on "Identity/Diversity" page tab

- **Job Data Hyperlink – Work Location Page**
  - Effective Date: Information defaulted
  - Action: Leave default as “Hire”
  - Reason: Select Hire w/Recruitment
  - Position Number: Leave blank
  - Company: Select “UFL” from look-up
  - Business Unit: Information becomes defaulted
  - Department: Enter Department ID or use look-up
  - Location: Information becomes defaulted
  - Establishment ID: “UFL” is defaulted
  - Work County: Select from look-up (Remember to select “work” county, not county of residence)
  - Click on “Job Data” hyperlink

- **Job Information Page**
  - Job Code: Enter or use look-up (The most frequently used job codes are: 0001479 – OPS Hourly Non-Secretarial/Clerical and 001480 - OPS Hourly Secretarial/Clerical.)
  - DO NOT COMPLETE THE JOB INFORMATION PAGE NOW
  - Proceed to “Salary Plan” page tab

- **Salary Plan Page**
  - Salary Administration Plan: Use Hiring Matrix to select from look-up
  - Do nothing to other fields on this page
  - Return to “Job Information” page

- **Job Information Page**
  - Full/Part Time: Select
  - Employee Class: Select from Hiring Matrix
  - Work Period: Select from Hiring Matrix (W = Hourly; W# = Exempt)
  - Standard Hours: Select
  - FTE: Information becomes defaulted
    - Use FTE Match Document to check that Standard Hours and FTE match
  - Click on the “Payroll” page tab

- **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: Select
  - Holiday Schedule: Use Hiring Matrix and select from look-up
FICA Status: Select
Click on “Compensation” page tab

**Compensation Page**
- Click on “Default Pay Components” button
- Rate Code: View as North American Annual or North American Hourly
- Frequency (lower right screen): View defaulted information
- Frequency (upper right screen): Use Hiring Matrix and select from look-up
- Compensation Rate: 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
- 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
- **Note:** Please ensure the “Send Time to Payroll” box is checked
- Click on “OK”

**Benefits Program Participation Hyperlink – Benefit Program Participation Page**
- Benefit Program Code for all OPS employees is “OPR.” Most frequently, make no changes here.
- **Note:** If you are hiring an employee who previously had benefits into an OPS position, verify the Benefit Program Code is “OPR” on the new row added to the Benefits Enrollment Page, changing the code, if needed, to “OPR.”
- **Note:** If you are hiring an employee who previously had benefits into an OPS position, there must be at least one day break in service. For example, if an employee ends a prior benefits eligible position (TEAMS, faculty, or USPS) on September 30, the rehire into an OPS position cannot be effective on the same date. The rehire could not begin until October 1. Failure to leave at least one day break in service will cause the employee not to receive COBRA benefits because PeopleFirst must be able to read a termination date that is not the same as an employment date.

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

**INITIATING WORKFLOW**

**Best Practices**
- 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.
- Go to UF HR Approve Job by navigating through the menu
  - Workforce Administration > UF HR Approve Job > UF HR Approve Job
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

**Next Step: Set Up Payroll Distribution**

- Obtain both Level 1 and Level 2 approval before entering payroll distribution
- Attend “Distributions/Additional Pay” training for details