Appointment Entry: Hire Step by Step

This job aid contains detailed information on how to enter new external hire appointment data that comes from Recruiting Solutions in the Human Resources Management System (HRMS). For an Internal Transfer or Internal Non-Employee, see the Appointment Entry Updates course and job aids.

Follow the instructions in this job aid to complete the applicable areas in HRMS.

<table>
<thead>
<tr>
<th>Prior to HRMS Entry</th>
<th>Entry into HRMS</th>
</tr>
</thead>
</table>

**STEP 1: GETTING STARTED**

1. Make certain all paperwork is complete and has been approved.
   - a. Do you have all supporting documentation to enter your new hire? (HRIF, PAW, Offer Letter, Vitae, Resume, and Degree Verification if applicable)
   - b. Is the appointment reviewed and approved?
   - c. Is appointment being entered on or before the first date of employment? Note: Appointments can be entered up to 90 days prior to the start of the appointment.
   - d. Has employee completed the I-9 prior to start or within the first 3 days of work?
   - e. If recruited, start with Manage Hires. If not, then a) Search for People then b) Add a Person.

**STEP 2: IN HRMS: MANAGE HIRES**

1. Log in to HRMS through MyU (myu.umn.edu): click Key Links > PeopleSoft > Human Resources.
2. Navigate to: Workforce Administration > Personal Information > Manage Hires.
   - a. On the Manage Hires page, search for and select the new hire’s name. If it is an external hire, continue following this job aid.
   - b. Review the status of the hire on the Manage Hires Detail page. See if the employee came through Manage Hires with an Empl ID, then follow the appropriate process.
### Appointment Entry: Hire Step by Step (cont.)

<table>
<thead>
<tr>
<th>Empl ID in Manage Hires</th>
<th>NO Empl ID in Manage Hires</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Review the Manage Hires Details data for accuracy.</td>
<td>1. View the Manage Hires Details data for accuracy.</td>
</tr>
<tr>
<td>2. Click &lt;View/Edit Person&gt;.</td>
<td>2. Click &lt;Add Person&gt;.</td>
</tr>
<tr>
<td>3. Enter information on Biographical Details, Contact Information, and Regional tabs.</td>
<td>3. Enter information on Biographical Details, Contact Information, and Organizational Relationships tabs.</td>
</tr>
<tr>
<td>4. Click &lt;OK&gt;.</td>
<td>4. Click &lt;OK&gt;.</td>
</tr>
<tr>
<td>5. Click &lt;Add Job&gt;.</td>
<td>You are brought to Job Data.</td>
</tr>
<tr>
<td>You are brought to Job Data.</td>
<td></td>
</tr>
</tbody>
</table>

Note: The data entry for **Biographical Details**, **Contact Information**, and **Regional** tabs is the same for both paths.

c. Enter this information on the **Biographical Details** tab:
   
   i. **Display Name** (as it appears on SSN card or legal documentation).
   
   ii. **Date of Birth**
   
   iii. **Gender**
   
   iv. **National ID (SSN)**

d. **Contact Information** tab

Note: If the Home Address defaulted from Recruiting Solutions, verify the address is correct or make updates, if necessary.

   i. **Home Address**
      
      * Click <Add Address Detail>.
      
      * Click <Add Address>.
      
      * Enter the home address according to U.S. Postal Service standards.
      
      * Click <OK>.

   ii. **Campus Mail Address**
       
       * Click the plus sign to add another row.
       
       * Select “Campus” from the drop-down menu.
Appointment Entry: Hire Step by Step (cont.)

- Click <Add Address Detail>.
- Click the lookup icon next to Location Address Name field.
- Select the appropriate campus mail code from the list.
- Click <Address Linkage> to populate the address.
- Click <OK>.

iii. Campus Office Location Address

- Click the plus sign to add another row.
- Select “Campus Office Location 1” from the drop-down menu.
- Click <Add Address Detail>.
- Click <Add Address> to free form type in the address. Note: An “address scrubber” will validate your entry.
- Click <OK>.

iv. Phone Number

- Select the phone type from the drop-down menu.
- Enter the home phone and campus location phone numbers.
- At least one phone number must be checked as preferred in order to save. Check “Preferred” for the home number.

v. Regional tab

- Enter Ethnic Group, if it did not populate from Recruiting Solutions.

vi. Organizational Relationship tab (will not appear if the new hire had an Empl ID in Manage Hires)

- Verify the Employee checkbox is checked.
- Click <Add Relationship>.
Appointment Entry: Hire Step by Step (cont.)

STEP 3: IN HRMS: JOB DATA

Once the employee relationship is established, go to the Job Data page and its multiple tabs.

1. Verify that all the data that populated from Position Management is correct. If data is incorrect, speak to your position manager.

2. Complete the following fields within the Job Data tabs:
   a. Work Location tab
      i. Reason – Select the appropriate reason code.
      ii. Job Indicator – Select “Primary.” If there is more than one employment record, stop and contact the Call Center 612-624-UOHR (-8647) for assistance.
      iii. Expected Job End Date – Required for Undergraduate and Graduate students, Temp/Casual, 9 and 10 month appointments, Multi-year Appointments, Temporary-Posted, and Temporary No-Post positions.
   b. Job Information tab
      i. Empl Class – Select the appropriate Empl Class based on the options given.
      ii. Officer Code – Used only by the University of Minnesota Police Department and Central Benefits.
   c. Job Labor tab. Note: Only used for labor represented positions that belong to Bargaining Units 03, 04, 06, and 07.
      i. Seniority Dept – Click the lookup to select the Z DeptID.
      ii. Seniority Reporting Unit – For Bargaining Units 06 and 07 only. Otherwise leave blank.
      iii. First Bump – For Bargaining Units 06 and 07 only. Otherwise leave blank.
      iv. Seniority Type – Required for Bargaining Unit 06 or 07. Choose from “Continuing,” “Temporary,” “Temporary NP,” or “Supplement.”
      v. Seniority Location – For Bargaining Unit 03 only. Choose the correct seniority location for the Seniority Roster Report.
      vi. <Employment Data Link>
         Progression Anniversary Date – Required for the following bargaining units so increases can be automated: AFSCME Clerical (06), Technical Bargaining (07), and Health Care (04).
Entry dates for each bargaining unit should follow the most recent entry into each bargaining unit (i.e., a Hire or Rehire date in job data):

- New Hires in AFSCME Clerical (06) use the start date of employment in the clerical bargaining unit.
- New Hires in AFSCME Clerical (06) and Technical Bargaining (07) for Temporary No-Post Positions. Do NOT populate the date. Leave blank.
- New Hires in Technical Bargaining (07) (hired during the time period 10/01/XX - 03/31/XX), take the date of the original hire and calculate an additional six months to the date. Enter the newly calculated date in the field. (Note: Once probation has passed, the anniversary date must be changed to 10/01/XX of the year they passed probation.)
- New Hires in Health Care (04):
  - If the employee is hired at Step 1, add six months to the hire date. This is used as the first progression/anniversary date.
  - If the employee is hired at Step 2, add six months to the hire date. This is used as the first progression/anniversary date.
  - If the employee is hired at Step 3 or above, enter the hire date as the progression/anniversary date.

**d. Payroll tab**

i. **Payroll Information section.** IMPORTANT: If the employee is Absence eligible, complete the following fields:

- **Payroll System** – Leave at default, “Payroll for North America.”
- **Absence System** – Select “Absence Management” if the employee is eligible and needs to be enrolled in absence management. If the employee is not eligible, leave Absence System as “Other.”

ii. **Payroll for North America section**

1. **Pay Group** – Select the appropriate Pay Group based on the appointment length (not how they are paid).

<table>
<thead>
<tr>
<th>Employee Appointment Length</th>
<th>Pay Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 month</td>
<td>P12</td>
</tr>
<tr>
<td>9 over 9, 9 over 12</td>
<td>P09</td>
</tr>
<tr>
<td>10 over 10, 10 over 12</td>
<td>P10</td>
</tr>
<tr>
<td>Less than 9 month, student hourly, short term</td>
<td>PLH</td>
</tr>
</tbody>
</table>
2. **Employee Type** – Select how the employee is paid: “E - Exception Hourly,” “H - Hourly,” “S - Salaried.”

   iii. **Pay Group** – Should match the Pay Group from the Payroll for North America section.

   iv. **Use Pay Group Eligibility** – DESELECT the checkbox.

   v. **Eligibility Group** – Select the appropriate group to enroll the employee in. For more details on eligibility, read the policy for the employment group.

  e. **Salary Plan** tab

     i. **Step** – If the employee is paid on step, enter the appropriate step number.

     ii. Click <Employment Data> (bottom of page). This field is used to track progress in step increases for clerical and technical bargaining units.

     iii. Click the <Job Data> link to return to the **Salary Plan** tab.

  f. **Compensation** tab

     i. **Frequency** (top of page)

        * Select the appropriate Compensation Rate frequency value. Only use values listed in this chart.

        | Frequency | Description |
        |----------|-------------|
        | H – Hourly | Use for Hourly and Exception Hourly employees |
        | B – Biweekly | 12 month, 9/12, 10/12, less than 9 months, or appointments |
        | B09 – 9 month | 9 month appointment paid over 9 months |
        | B10 – 10 month | 10 month paid over 10 months |

     ii. Click <Default Pay Components> to populate the Pay Rates section and to avoid potential error messages.

     iii. **Pay Components** section

        1. **Rate Code** – Select the appropriate rate code value.

           * “BASE” for Salaried Employees

           * “HRLY” for Exception Hourly and Hourly Employees
Appointment Entry: Hire Step by Step (cont.)

- The remaining options are for components of pay:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(AAA) Academic Administrative Augment</td>
<td>Use for Academic employees with an IPEDS Code of 1</td>
</tr>
<tr>
<td>(ASGN) Assignments</td>
<td>Use for unpaid appointments (e.g., UNS)</td>
</tr>
<tr>
<td>(FAA) Faculty Administrative Augment</td>
<td>Use for Academic employees hired into 9360 (Chair with Faculty Rank), 9361 (Head with Faculty Rank), 9362 (Director with Faculty Rank)</td>
</tr>
<tr>
<td>(INCR) Increment</td>
<td>Use for Academic employees</td>
</tr>
<tr>
<td>PPI (Private Practice Income)</td>
<td>Use only for UMP employees</td>
</tr>
<tr>
<td>REGENT (Regent Award)</td>
<td>Use for Salaried employees</td>
</tr>
</tbody>
</table>

2. **Comp Rate**

- For Salaried employees, enter the 100% annual income amount, regardless of length or percent appointment. The standard hours and FTE from the **Job Information** tab will display true salary under the **Pay Rates section, Annual**.

- For Hourly and Exception Hourly employees, enter the hourly pay rate.

3. **Frequency** – Select the appropriate Comp Rate frequency value.

<table>
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<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – Annual</td>
<td>Use for Salaried employees</td>
</tr>
<tr>
<td>H – Hourly</td>
<td>Use for Hourly and Exception Hourly employees</td>
</tr>
</tbody>
</table>

g. Click <Calculate Compensation>.

h. Verify that the **Compensation** and **Pay Rates** sections (Annual, Monthly, Daily, and Hourly) look correct.

i. Click <Save>.

**STEP 4: IN HRMS OTHER PAGES**

1. **Citizenship page**

   a. Navigate to: **Main Menu > Workforce Administration > Personal Information > Citizenship > Identification Data**.

2. **Disability Status page**, if applicable

   a. Navigate to: **Main Menu > Workforce Administration > Personal Information > Disability > Disabilities**.

   Note: Expand the **USA Flag** section and select the **Disability Status** drop-down menu, then enter the disclosure date. Do not check the **Disabled** checkbox.
Appointment Entry: Hire Step by Step (cont.)

3. Additional Pay page, if applicable
   a. Navigate to: Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay.

4. Prior Work Experience page
   Required for all Academic employees.
   a. Navigate to: Main Menu > Workforce Administration > Personal Information > Biographical > Prior Work Experience.
   b. Enter all relevant prior work experience starting with the oldest job first.
   c. Click the plus sign to add additional work experience.
   d. Click <Save>.

STEP 5: IN HRMS OTHER PAGES (ACADEMIC APPOINTMENTS)

1. Education page
   Required for all Academic employees.
   a. Navigate to: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles.
   b. Click the Education tab.
   c. Click <Add New Degree>.
   d. Enter verified information.
   e. Click <OK>.
   f. Repeat for each degree held by the employee.
   g. Click <Save>.

2. Contract page
   Required for all Academic employees for Notice of Appointment requirement. Note: See separate Contract Details course and job aids for this information.
   a. Navigate to: Main Menu > Workforce Administration > Job Information > Contract Administration > Update Contract Pay NA.

3. Tenure page (includes Continuous data)
   Note: See separate Tenure course and job aids for this information.
   a. Navigate to: Main Menu > Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data.