

PeopleSoft New Hire Checklists HR/Payroll/Benefits

June 13, 2008



A business process has been adopted in the ConnectND Hire process. The process is necessary to ensure that the HR and Student Administration databases are synchronized to avoid multiple ID's for any one individual. This is an important issue to enable the University System to track and administer the students they employ in work-study or as temporaries (and employees who take classes as students). Common ID's between the HR & Student Administration databases will also help the University System do some tracking of students into the workforce and improve our knowledge of the educational backgrounds of our employees.

BUSINESS PROCESS

The business process places a new entry screen in the hire process. On the employment side, the screen (shown below) uses various personal information on a new hire to search the Student Administration database to see if that person already has a StudentID. If it finds a record, the StudentID will become the EmplID.

Main Menu > Workforce Administration > Personal Information > ND Hire

EMPLID Search

EmplID:	<input type="text"/>	*National ID:	<input type="text"/>
*Last Name:	<input type="text"/>	*Date of Birth:	<input type="text"/>
First Name:	<input type="text"/>	<input type="radio"/> Male <input type="radio"/> Female	
Middle Name:	<input type="text"/>		
Address:	<input type="text"/>		
City:	<input type="text"/>		
Country:	<input type="text"/>	State:	<input type="text"/>

Please specify appropriate search criteria and click 'Search' push button to start search.

Enter information for the new employee in the 'ND Hire' screen, then press 'Search'. If no records are found (see below), click on Continue for the hire process.

EMPLID Search

EmpID:	<input type="text"/>	*National ID:	<input type="text" value="123456789"/>
*Last Name:	<input type="text" value="Leghorn"/>	*Date of Birth:	<input type="text" value="07/01/1960"/> <small>31</small>
First Name:	<input type="text" value="Sam"/>	<input type="radio"/> Male <input type="radio"/> Female	
Middle Name:	<input type="text"/>		
Address:	<input type="text"/>		
City:	<input type="text"/>		
Country:	<input type="text"/> <small>🔍</small>	State:	<input type="text"/> <small>🔍</small>

No Employee records were found that matched your search criteria.

i You can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

If a matching record is found in the HR database (or both HR & SA as below), it will be necessary to switch to a Transfer or Re-Hire process. At this point you will need to call the ITD Service Desk at 328-4470 and log a Heat Ticket for OMB HR/Payroll.

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EMPLID Search

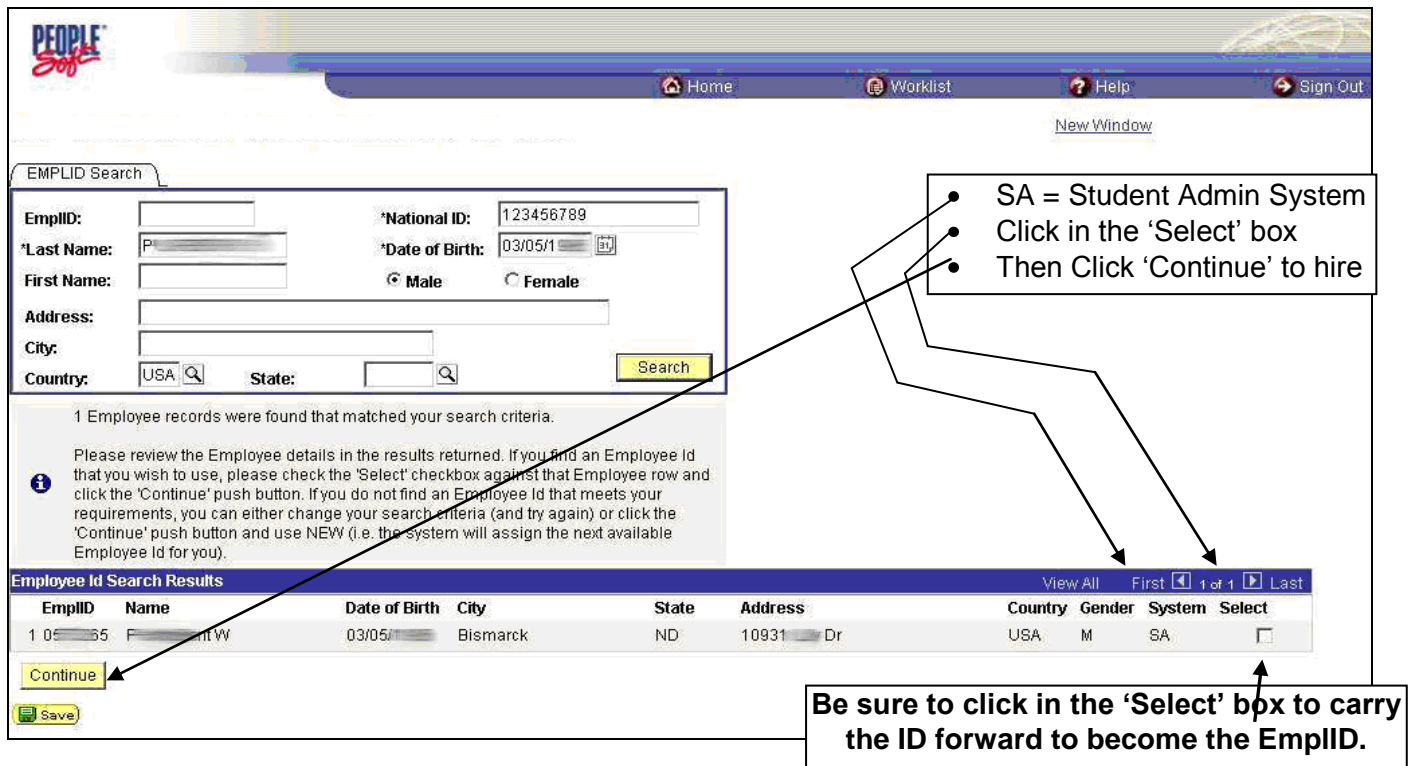
EmpID:	<input type="text"/>	*National ID:	<input type="text" value="5-1"/>
*Last Name:	<input type="text" value="P-"/>	*Date of Birth:	<input type="text" value="04/14/"/> <small>31</small>
First Name:	<input type="text"/>	<input type="radio"/> Male <input type="radio"/> Female	
Address:	<input type="text"/>		
City:	<input type="text"/>		
Country:	<input type="text" value="USA"/> <small>🔍</small>	State:	<input type="text"/> <small>🔍</small>

2 Employee records were found that matched your search criteria.

i Please review the Employee details in the results returned. If you find an Employee Id that you wish to use, please check the 'Select' checkbox against that Employee row and click the 'Continue' push button. If you do not find an Employee Id that meets your requirements, you can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

Employee Id Search Results								View All	First	1-2 of 2	Last
EmpID	Name	Date of Birth	City	State	Address	Country	Gender	System	Select		
1 0292511	P- I	04/14/	Bismarck	ND	14 New Jersey	USA	M	SA	<input type="checkbox"/>		
2 0292511	P- I	04/14/	BISMARCK	ND	109 Y DRIVE	USA	M	HR	<input type="checkbox"/>		

If a matching record is found in the Student Admin (SA) system, you may then select the correct SA matching record and click 'Continue' to proceed through the hire process.



SA = Student Admin System
 Click in the 'Select' box
 Then Click 'Continue' to hire

Be sure to click in the 'Select' box to carry the ID forward to become the EmpID.

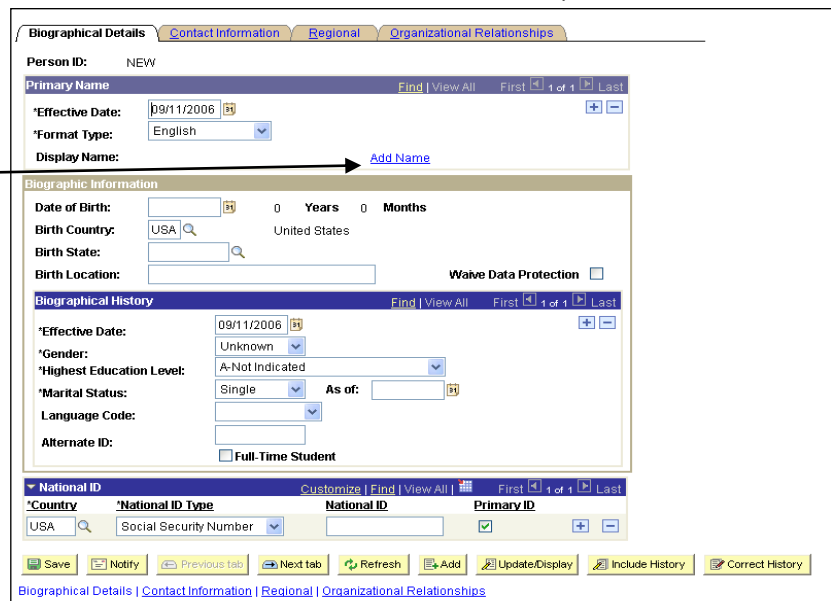
The following checklist highlights remaining Menu Items, Components, and Pages necessary for basic initial processing. The checklist focuses on the most common general situations. For specific detail, see the relevant manual.

HR/Payroll Checklist for New Hires

HR: (Navigation: Workforce Administration > Personal Information > ND Hire)

Enter all Biographical Details, effective date is date of hire.

Click on 'Add Name'



Enter name and click OK

Edit Name

English Name Format

Prefix:

First Name: Nicky Middle Name: M

Last Name: Porter

Suffix:

Display Name:

Formal Name:

Name:

OK Cancel Refresh

Continue on to Contact Information. Click on 'Add Address Detail'

Biographical Details Contact Information Regional Organizational Relationships

Person ID: NEW

Current Addresses Customize | Find | View All | First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	05/10/2006			Add Address Detail + -

Phone Information Customize | Find | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+ -

Email Addresses Customize | Find | First 1 of 1 Last

*Email Type	*Email Address	Preferred	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+ -

Save Notify Previous tab Next tab Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

Click on 'Add Address'

Address History

Address Type: Home

Address History Find First 1 of 1 Last

*Effective Date	Country	*Status	Address:	
05/10/2006	USA	A		Add Address + -

OK Cancel Refresh

Enter address information – Click OK

Edit Address

Country: United States

Address 1: 3323 Parker Lane

Address 2:

Address 3:

City: Bismarck State: ND North Dakota Postal: 58503

County: Burleigh

OK Cancel

Complete other Contact Information

Biographical Details | **Contact Information** | **Regional** | **Organizational Relationships**

Person ID: NEW

Current Addresses Customize | Find | View All | First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	05/10/2006	A	3323 Parker Lane Bismarck, ND 58503 Burleigh	Edit/View Address Detail + -

Phone Information Customize | Find | View All | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred
Business	7013284900		<input type="checkbox"/>

Email Addresses Customize | Find | View All | First 1 of 1 Last

*Email Type	*Email Address	Preferred
		<input type="checkbox"/>

Save Notify Previous tab Next tab Refresh Add Update/Display Include History Correct History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Complete Regional Information

Biographical Details | **Contact Information** | **Regional** | **Organizational Relationships**

Person ID:

USA

Ethnic Group Find | View All | First 1 of 1 Last

Regulatory Region: USA United States Ethnic Group: WHITE White Primary

History Find | View All | First 1 of 1 Last

Effective Date: 05/10/2006
 Date Entitled to Medicare:
 Citizenship (Proof 1):
 Eligible to Work in U.S.

Military Status: No Military Service
 Citizenship (Proof 2):

Smoker History Customize | Find | View All | First 1 of 1 Last

*Smoker	*As of
1	<input type="text"/>

Save Notify Previous tab Next tab Refresh Add Update/Display Include History Correct History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Complete Organizational Relationships. Check 'Employee' and then click on 'Add the Relationship' this will give you your EmplID and take you to the Work Location tab.

Fill in information:

Job Data

- Work Location
- Job Information
- Job Labor **(Not Used)**
- Payroll
- Salary Plan
- Compensation

Last Start Date will change to hire date when saved.

Employment Data

- Employment Info

Earnings Distribution

- Job Earnings Distribution

Click OK when done inputting all information. (This will take you back to the Organizational Relationships screen. You can now move on to Workers Compensation.)

Workers Compensation (Workforce Administration > Job Information)

Emergency Contact (Workforce Admin > Personal Information > Personal Relationships)

Designated Medical Provider (Workforce Admin > Personal Information > Personal Relationships)

Driver's License Data (Optional) (Workforce Admin > Personal Information > Biographical)

Direct Deposit (Payroll for North America > Employee Pay Data USA > Request Direct Deposit) **The 'Suppress DDP Advice Print' box should be checked if the employee has access to the Portal and self service.**

Employee Tax Distribution (Payroll for North America > Employee Pay Data USA > Update Tax Distribution) *This panel is automatically created through 'hire' but should be checked for correct locality information.*

Employee Tax Data (Payroll for North America > Employee Pay Data USA > Update Employee Tax Data) *For a new hire, insert a new row with the effective date of the day after the hire date even though the employee's tax status is S and allowances are 0 (the default) to signify that you have reviewed the employee's tax data.*

- Federal Tax Data
- State Tax Data

Commitment Accounting: (Set Up HRMS > Product Related > Commitment Accounting > Budget Information)

Department Budget Table - *All employees must have a department budget table. If the hire is a permanent employee filling a previously existing position, the table may already be set up, but ensure the established combination code is correct for that employee.*

Benefits: Once you have entered and saved the New Hire in Job Data, a benefit event is created. Before you can process the event, it needs to be assigned to your schedule. This is a centralized activity that automatically runs every half hour.

Prepare Benefit Options: (Benefits>Manage Automated Enrollment>Run Automated Event Processing)

Enter Benefit Elections: (Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry)

- Enter dependent information for medical, dental and vision plans
- Enter employee benefit elections (see list below) from enrollment forms

Finalize/Close Event: (Benefits>Manage Automated Enrollment>Run Automated Event Processing)

Benefit Elections Entered Through Automated Enrollment

(This list includes all PERS sponsored benefits, with the exception of UNUM Long-term Care Insurance, which is entered as a general deduction)

Health Benefits

- Medical
- Dental
- Vision
- Employee Assistance Program

Life and AD/D Benefits

- Basic Life
- Supplemental Life (supplemental and supplemental flex)
- Dependent Life
- Spouse Supplemental Life

Savings Plans (457 Deferred Comp Plan)

- Plan 1
- Plan 2
- Plan 3

Leave Plans

- Sick
- Vacation
- Comp Time

FSA Benefits (Flexcomp Program)

- Flex Spending Health
- Flex Spending Dependent Care

Retirement Plans

- PERS
- Defined Benefit
- Defined Contribution