HR Front End Transaction – New Faculty Hire 9/12 service with Start Date beginning during the summer (This process should not be followed for a 12 month faculty)

Overview

Transaction type:  New Hire
Routing:  Org Initiate, Org Review, College Review, Campus Apply
Documents to attach:
- Offer/Accept letter
- ODEA email approval for Assistant, Associate, or Full Professors
- CV/Resume for all Assistant, Associate, or Full Professors, including Visiting or Adjunct
- Provost Approval for Associate or Full Professor
- Tenure form for Associate or Full Professor
- Proof of completion of terminal degree – document from degree granting institution indicating degree and date (if appointment at rank of Assistant Professor and degree completed one year or less prior to the start date of the appointment)

I-9:  The University of Illinois uses Tracker for completing I-9s. The employee must complete and sign (electronically) Section 1 on or before their first day of work for pay. The appropriate I-9 Manager or Designated Agent must complete and sign (electronically) Section 2 no later than the third day of work for pay. The I-9 must be completed in Tracker before the HR Front End will allow the transaction to be routed. Failure to complete the I-9 in a timely manner and/or attached to the HRFE transaction can delay payment to the employee. (I-9 Job Aids are available on [http://www.ahr.illinois.edu/](http://www.ahr.illinois.edu/))

Social Security Card – Units must view the employee’s social security card (scanned or faxed copy is acceptable) to ensure the name entered in the new hire setup matches the name as it appears on the social security card (including middle name/initial). This is a critical step in the new hire process as the University is fined for records found in the payroll system with names that do not match the names recorded with Social Security Administration.

HR Front End Detailed Steps

NOTE:  Be sure the position is created using the Position Creation and Maintenance transaction before you begin this process. When creating the position, the position begin date should be July 1 of the fiscal year in which the job begins to avoid errors when adding the summer and academic year jobs. For example, if your summer appointment begins 6/16/2013, your position begin date should reflect 7/1/2012.

Add Summer Job:

1.  Select Transactions >> Initiate New Hire
2.  Choose the appropriate answer for the student question. If Yes, UIN/Banner ID must be entered as part of the search criteria.
3.  Type appropriate values in the SSN, Last Name, First name and Birth Date fields
4.  Click Search
a. If a record with Status A-Active is found, then this person is not a new hire. Use an Add a Job transaction.
b. If a record with Status T-Terminated is found for this person, select the record (if there are two results, always choose the BANNER record) and click Continue to rehire the employee.
c. If no match is found, click Continue
d. On the Demographic Information screen, type, select or verify the following: Gender, Unit Contact Email, Employee Email (if known), Citizenship, Home COA and Organization, HR Campus, Hire Date, Mail Code, Campus Mail Location and Campus Address. Overwrite existing information as necessary for a rehire.

5. Click Continue

6. On the Employee Class and Benefit Category Determination screen:
   a. Select Employee Group A-Faculty and Other Academic
   b. Select Yes or No to employee visa question
   c. Type an Annual Salary
   d. Type a Total % Employed for the entire person using whole numbers between 0 and 100
   e. Select the appropriate length for the academic contract (usually Greater than or equal to 9 months)
   f. Select Pay Basis 9/12 (typically used for faculty jobs)
   g. Click Continue

7. Select whether the employee is currently receiving SURS retirement pay. If No, answer the firefighter/police question.

8. Click Continue

9. Review information in the New Hire Review screen, especially First Name, Last Name and SSN. Verify that Employee Class displayed is correct. Edit any incorrect information, print if desired and click Continue.

10. Click OK to generate a Logon ID and apply the data to Banner. You cannot undo this process.

11. On the New Hire Logon Confirmation screen, click Continue to proceed to the Position Selection screen
   a. Enter the same position number as their academic year appointment in the I have a position number field
   b. Click Continue

12. On the Position Data screen, verify, select or type the following fields as needed: Position Class, Position Title (use UPPERCASE letters only), Position Employee Class, Budget Profile (should be R, B or N), Budget Org, and Position Labor Distribution

13. Click Continue

14. On the Job Data screen:
   a. Add Job End Date (cannot be greater than 8/15/YY)
   b. Change Suffix to 01
   c. Verify the Job Title
   d. Change Factors to 9
   e. Enter the Job FTE if necessary, using decimal value from 0.01 to 1.00
   f. Review the Annual rate. Monthly should be 1/9th of the annual amount.
   g. Job Change Reason defaults to HR001-New Hire. If necessary, choose a different reason such as HR002 for a rehire.
   h. Change Job Employee Class from AA to AE or AF (AE if employee is to receive benefits starting with the summer appointment, AF if benefits should not start during summer)
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For AHR Use Only - S:\HRFE\Current Transaction Tips

i. Change Leave Category to IN
j. Enter Search Number, if applicable
k. Verify the Job Labor Distribution:
   i. If a change is needed to existing values, click on that field, overwrite the numbers, and click Update to the right of the LD row. Note: You must click Update next to each LD row for which you change values.
   ii. If an additional line is needed, use vertical blank fields below the LD row(s) to enter data. Click Add LD.
l. Type a Job Comment that includes contact email and phone number and click Add Comment. Note: Once the comment is added you cannot change or remove it.
m. Click Continue
n. If new hire is on a Visa, open the Employee General Information accordion, select the Visa Type as listed on the I-9 and type the work authorization expiration date in the Exp Date field. Click Save.

15. Add attachment(s) as follows:
   a. Click Attachments tab
   b. Click Add Attachment
c. Click Browse, select document to attach (either on your hard drive or network drive)
d. Click Open
e. Click Add
f. Select Document Type (Offer/Acceptance letter = Offer Letter; ODEA email = Search; CV/Resume = CV; Provost Approval = Provost Approval; Tenure form = Provost Approval; Proof of completion of terminal degree = Letter of Explanation-General), and type a Description
g. Repeat as necessary for additional documents. Once all are listed, click Upload. Check the message at the top of the screen to ensure that no error occurred.
h. Click Done
i. You may change the Doc Type in Employee Record View by using the drop down box. You can also edit the Description. Then click Save Attachment.

Add Academic Year Job:

16. Click on the Add Change button in the Proposed Changes section
17. Select Transactions> Add a Job
18. Enter position number used on summer job
19. Click Continue
20. Enter a job begin date of 8/16/YY; leave job end date field blank
21. Click Continue
22. Position Data should remain as is
23. Click Continue
24. On the Job Data screen:
   a. Change suffix from 02 to 00
   b. Verify Factor reflects 12
   c. Enter the Job FTE using decimal value from 0.01 to 1.00
   d. Enter the job’s Annual Salary (same as above)
   e. Verify Timesheet Org (defaulted from Position Budget Org); edit if needed
   f. Verify that the Job Employee Eclass is AA
   g. Verify Leave Category is A3
h. Verify the **Job Labor Distribution:**
   i. If a change is needed to existing values, click on that field, overwrite the numbers, and click **Update** to the right of the LD row. Note: You must click **Update** next to each LD row for which you change values.
   ii. If an additional line is needed, use vertical blank fields below the LD row(s) to enter data. Click **Add LD**.

25. Type a **Job Comment.** Include contact email & phone number, and click **Add.** Note: Once the comment is added you cannot change or remove it.

26. Click **Continue** to be taken back to the Employee Record View (ERV)

27. Verify that the employee has completed required NESSIE New Hire forms – EIF, Loan Default, ANCRA, W4 (US Citizens and Permanent Residents only) via the New Hire Tab, and the I-9 via Tracker. May have to select View next to the New Hire job change reason line under Proposed Changes section to change view date and allow New Hire Forms tab to be visible.

28. Click the **Bio/Demo** tab and click once on the **Education** accordion to expand it. Verify that the employee has entered a degree (typically PhD), degree date and Education institution on their EIF. If any of the education information is missing or institution is listed as Misc, employee must go into NESSIE (not NESSIE New Hire) to update their education information.

29. Routing
   a. Review all changes and **Route.** Should get message Success routing to Org Review stop.
   b. If initiator also has Org Review permissions, click the Take Ownership button in the Employee Record View. Otherwise, the transaction appears in the Org reviewer Group Inbox. Org reviewer must Take Ownership, review and Route. Should get message success routing to College Review stop. (If reviewer is not the Home Org, transaction routes to the Home Org before going to the college stop.)
   c. Transaction appears in college reviewer Group Inbox. College reviewer must Take Ownership, review and Route. Should get message success routing to CAMPUS Apply stop. (If reviewer is not the home college, transaction routes to the home college before going to the campus stop.)
   d. Transaction appears in Academic HR Group Inbox. Academic HR must Take Ownership, verify that all required documents are attached, review remainder of transaction and Apply.