HR Front End Transaction – Hiring Postdoctoral Research Associate

Overview
Transaction type: New Hire

Routing: Org Initiate, Org Review, College Review, Campus Apply

Note: May only hold a postdoctoral title for maximum of FIVE YEARS beyond the completion of their doctoral degree.

Documents to attach:

- Offer/Accept letter
- Hiring Request form (if using hard funds)
- Confirmation of Doctorate Degree (if degree received three months or less prior to the start date of the appointment)
- Written permission from ISSS or program sponsor for employees holding a J-1 visa (requires a new letter for each job)

Additional Document Needed:

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 transaction is routed to campus human resources/Student Employment. Campus human resources/Student Employment will return any transaction that does not have an I-9 completed in Tracker. Should a transaction be returned, the unit must ensure the I-9 is complete in Tracker, then route the transaction once again to campus human resources. Failure to complete the I-9 in a timely manner can delay payment to the employee.

HR Front End Detailed Steps

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, just click Continue.

5. 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.

6. Click Continue.

7. On the Employee Class and Benefit Category Determination screen:
   a. Select Employee Group P- Postdoc Fellow/Res Assoc/Intrn.
   b. Verify the answer to Does this Employee hold a J1, J2, F1 or F2 Visa is correct.
   c. Type an Annual Salary.
   d. Type a Total % Employed for the entire person using whole numbers between 0 and 100. Press Tab.
   e. Select the appropriate length for the academic contract (usually Greater than or equal to 9 months).
   f. If contract is 9 months or greater, select Pay Basis 12/12 (typically). If appropriate choose 9/12 instead.
   g. If contract is Less than 9 months type Service Begin and Service End Dates.
   h. Click Continue.

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

9. Click Continue.

10. 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 then click Continue.

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


13. Type a position number, or search for a position by chart and org and highlight the desired position. If no position number is available to be re-used you can create a new position.

14. Click Continue.

15. 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, Budget Org, and Position Labor Distribution.

16. Click Continue.

17. On the Job Data screen:
   a. Edit the Job FTE if necessary, using decimal value from 0.01 to 1.00
   b. Review the Annual rate. If the job is 9/12 all three rate fields auto-complete based on the Job Begin Date.
   c. Verify the Job Title and Job Employee Class.
   d. Job Change Reason defaults to HR001-New Hire. If necessary choose a different reason, such as HR002 for a rehire or HR003 for a SURS retiree.
   e. 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.
f. Type a Job Comment that includes contact email & phone number, and click Add Comment. Note: Once the comment is added you cannot change or remove it.
g. Click Continue.
18. 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. Then click Save.
19. If necessary, 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, 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.
20. WAIT until employee has completed required NESSIE New Hire forms - EIF (everyone), Loan Default (everyone), and W4 (US Citizens and Permanent Residents only).
21. Click the Bio/Demo tab and click once on the Education accordion to expand it. Verify that the employee has entered a degree (PhD) and degree date on their EIF. Then proceed to the next step.
22. Routing
   a. Review all changes again and click 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 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 routs 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.
      i. Verify that all required documents are attached.
      ii. Click once on the Service Dates and Contract Parameters accordion to expand.
      iii. Edit the Effective Date, Service Begin Date, and Service End Date.
      iv. Review remainder of transaction and Apply.

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