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
- BOT Approval
- OAE 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/)

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)
   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.** **N**ote: 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 the required MY UI Info 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 MY Profile (https://www.hr.uillinois.edu/myinfo) 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.