



HR Front End Transaction – Hiring Faculty and Specialized Faculty

Overview

Transaction type: New Hire

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

Documents to attach:

- Board of Trustees Approval (if tenure system appointment)
- Offer/Accept letter
- Hiring Request form – ONLY IF REQUIRED BY COLLEGE
- ODEA forms 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
- Service Toward Completion for the Probationary Period form for Assistant Professor if hired after the 8th week
- Proof of completion of terminal degree (if appointment at rank of Assistant Professor and degree completed one year 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)

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 and/or attached to the HRFE transaction 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** *A-Faculty and Specialized Faculty*.
 - b. Type an **Annual Salary**.
 - c. Type a **Total % Employed** for the entire person using whole numbers between 0 and 100. Press **Tab**.
 - d. Select the appropriate length for the academic contract (usually *Greater than or equal to 9 months*).
 - e. If contract is 9 months or greater, select **Pay Basis** *9/12* (typically used for faculty jobs). If appropriate choose *10/12* or *12/12* instead. If being hired under hardship **Pay Basis** is *9/9*.
 - f. If contract is *Less than 9 months* type **Service Begin** and **Service End Dates**.
 - g. 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.
12. On the **New Hire Logon Confirmation** screen click **Continue** to proceed to the **Position Selection** screen.
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, PAPE#, 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. Click **Memos** tab, type a memo with your contact e-mail address & phone number, and click **Add**.
21. **WAIT** until employee has completed required MY UI Info New Hire forms - EIF (everyone), Loan Default (everyone), and W4 (US Citizens and Permanent Residents only).
22. 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) and degree date on their EIF. Then proceed to the next step.
23. 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 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**.
 - 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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