Appointment Entry: New Hire Checklist

This checklist accompanies the “Appointment Entry: Hire” course. Use it to follow along with the course which covers entering an external hire. See the “Appointment Entry: Hire Step by Step” job aid for more details.

SECTION 1: GETTING STARTED

- Compile all necessary supporting documentation (e.g., Personnel Action Worksheet, Human Resource Information Form [HRIF], offer letter).
- Ensure appointment information has been reviewed and approved for entry.
- Enter appointment ON or BEFORE the first day of employment to ensure timely enrollment (if applicable) in Benefits, Time & Absence, etc.
- Ensure the new employee has completed the I-9 before their start date or within the first 3 days of work.
- If the employee was recruited from Recruiting Solutions, go to Manage Hires (see Section 2).
  - If they were not, perform a thorough Search for People to avoid duplicate records, then follow the Add a Person process (see the “Entering Appointments Manually” job aid).

SECTION 2: IN THE SYSTEM

- Navigate to MyU (myu.umn.edu):
  - Go to Key Links > PeopleSoft > Human Resources.
  - Then Main Menu > Workforce Administration > Personal Information > Manage Hires.
- Review the information that was originally entered in Recruiting Solutions.
  - Verify the employee’s name, date of birth, gender, and social security number on the Biographical Details tab.
  - Verify the home address, then enter Campus Mail, Campus Office Location, and Home and Campus Office phone numbers on the Contact Information tab.
  - Verify the Ethnicity field. Enter a value if it is blank.
  - Create the organizational relationship (i.e., employee) between the individual and the University.

SECTION 3: JOB DATA

- Enter data in the following Job Data tabs:
  - Work Location tab
    - Action/Reason code
    - Enter a date in the Expected Job End Date field if the employee is an Undergraduate, Graduate, 9 or 10 month appointment, Temp/Casual, Multi-year, or Temporary Posted/No Post appointment.
Appointment Entry: New Hire Checklist (cont.)

b. **Job Information** tab
   i. Employee Class

c. **Job Labor** tab (only required for Bargaining Units 03, 04, 06, 07)
   i. Click <Employment Data> to enter the Progression Anniversary Date.

d. **Payroll** tab
   i. Enter the appropriate **Pay Group**.
   ii. If employee is eligible, enroll them in Absence Management.

e. **Compensation** tab
   i. Enter the correct Frequencies and Compensation information per employee type.
   ii. Enter other Components of Pay (e.g., Increment), if applicable.

IMPORTANT: Next, verify the funding level and combo code/ChartField string this employee will be paid on are correct. Work with the payroll accountant if necessary. Navigate to: **Main Menu > UM Payroll Accounting > UM Distribution Entry > UM Distribution Entry**.

**SECTION 4: OTHER REQUIRED HRMS PAGES**

- Citizenship: **Main Menu > Workforce Administration > Personal Information > Citizenship > Identification Data**
- Disability Status: **Main Menu > Workforce Administration > Personal Information > Disability > Disabilities**
  
  Note: Expand the **USA Flag** section and select the **Disability Status** drop-down menu, then enter the disclosure date. Do not check the **Disabled** checkbox.
- Additional Pay (if applicable): **Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay**
- Emergency Contact: Employees can enter or edit an emergency contact through MyU. To enter an emergency contact on behalf of an employee, log in to Campus Solutions: **MyU > Key Links > PeopleSoft > Campus Solutions**. Once logged in, go to **Campus Community > Personal Information > Biographical > Emergency Contacts**.
- Verify department procedures for other page entry requirements.

**SECTION 5: ADDITIONAL PAGES REQUIRED FOR ACADEMIC EMPLOYEES**

- Prior Work Experience: **Main Menu > Workforce Administration > Personal Information > Biographical > Prior Work Experience**
- Education: **Main Menu > Workforce Development > Profile Management > Person Profiles**
- Contract: **Main Menu > Workforce Administration > Job Information > Contract Administration > Update Contract Pay NA**
- Tenure Data: **Main Menu > Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data**