Appointment Entry: New Hire Checklist

Use this job aid to follow along with the “Appointment Entry: Hire” 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).
  a. 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):
  a. Go to Key Links > PeopleSoft > Human Resources.
  b. Then Main Menu > Workforce Administration > Personal Information > Manage Hires.
- Review the information that was originally entered in Recruiting Solutions.
  a. Verify the employee's name, date of birth, gender, and social security number on the Biographical Details tab.
  b. Verify the home address, then enter Campus Mail, Campus Office Location, and Home and Campus Office phone numbers on the Contact Information tab.
  c. Enter the Background Check Date.
  d. Complete the Safety of Minors policy applies field, if applicable.
  e. Verify the Ethnic Group field. Enter a value if it is blank.
  f. Create the organizational relationship (e.g., employee) between individual and University.

SECTION 3: JOB DATA

- Enter data in the following Job Data tabs:
  a. Work Location tab
    i. Select the appropriate Reason. Note that an employee may have only one Action/Reason that is listed as “Hire/Hire.”
    ii. Select “Primary” for Job Indicator. If there is another employment record, stop and call the Contact Center 612-624-UCOH (HELP) for assistance.
    iii. 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.
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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