PeopleSoft

Adding a New Hire from Start to Finish Checklists

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Contents

PREPARED BY THE SDCOE CUSTOMER RESOURCE CENTER

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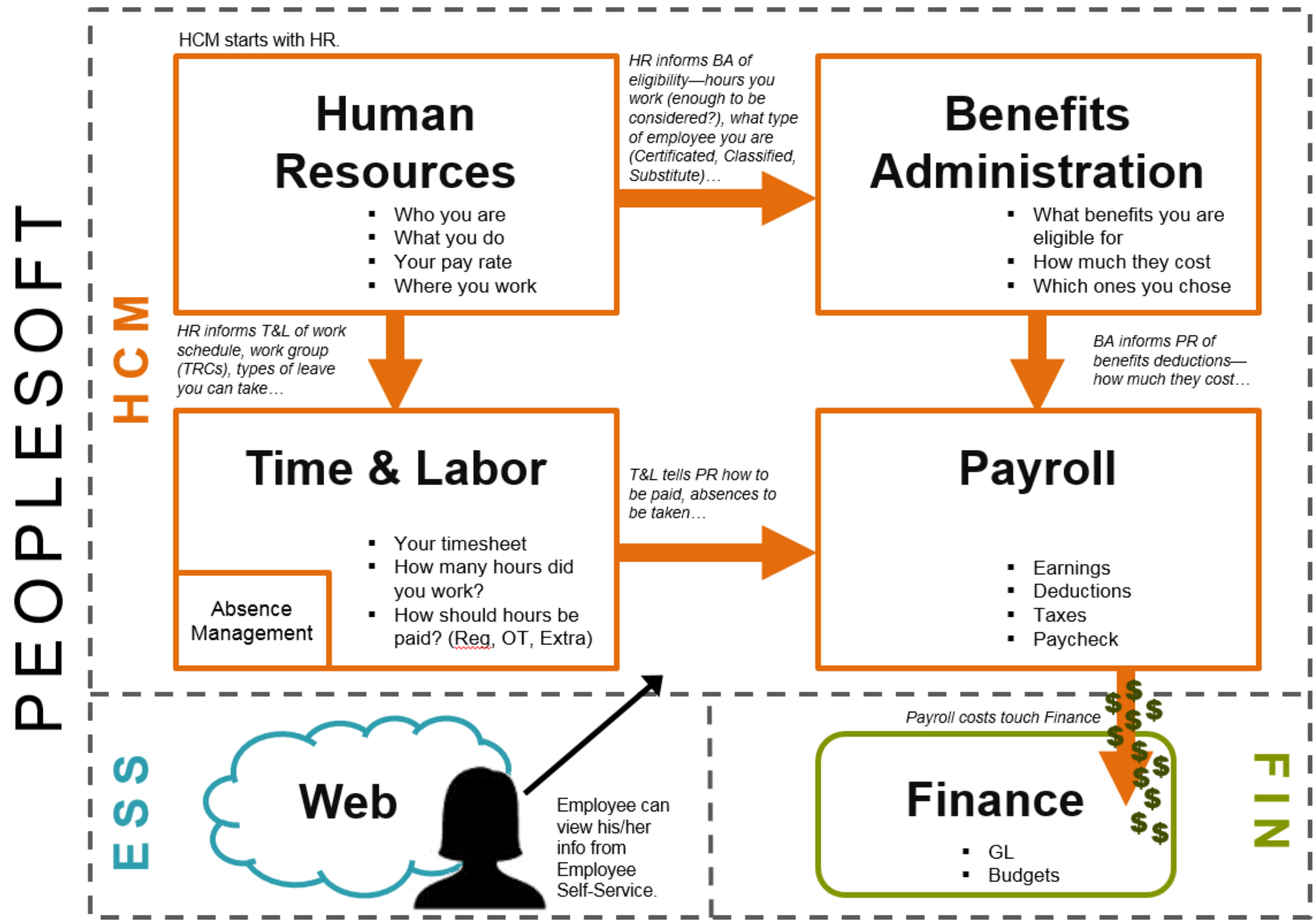
About This Guide

Overview

This guide was created by the SDCOE Customer Resource Center and provides checklists for Adding a New Hire from Start to Finish. These checklists cover each module in PeopleSoft HCM: Human Resources, Benefits Administration, Time & Labor, and Payroll (indicated in orange below).



For additional copies of this guide, please go to http://crc.sdcoe.net/resources/peoplesoft/guides.

Human Resources – Position Checklist

Before You Begin

Before you create or update a position, it is important to have the following information readily available. The information you need to enter/change is listed below where it is located on the four tabs that you will use on the **Add/Update Position Info** screen.

Description	Specific Information	Budget & Incumbents	CDAYS Track (Certificated Positions only)
☐ Effective Date ☐ Reason ☐ Job Code ☐ Reg/Temp ☐ Full/Part Time ☐ Department ☐ Location ☐ Reports To ☐ Salary Plan Information ☐ Standard Hours	☐ Headcount ☐ Update Incumbents (checkbox) ☐ Budgeted Positions (checkbox) *Expand the Education and Government triangle to enter/view these fields:* ☐ Classified Indicator ☐ FTE	*This is a view-only screen.* ✓ Current budget costs ✓ Current Incumbents (once filled)	☐ CDAYS Track (if Certificated Employee)

Things to Remember:

- When you add a new position in PeopleSoft, leave the value of *00000000* in the **Position Number** field. The system auto-generates this value once all of the Position Data has been entered and saved.
- When updating a position and the information is on the second, third, or fourth tab, you must click the plus sign (+) and add the effective date on the *first tab (Description)*.
- Hourly employees = 1.00 standard hours, Daily employees = 5.00 standard hours
- You cannot hire an Incumbent into a position that is future dated.

Human Resources – New Hires Checklist

☐ **<u>Person Search Query</u>**
Main Menu > Reporting Tools > Query > Query Viewer
M_PERSON_SEARCH

Add a New Hire-Personal Data	Add a New Hire-Job Data Record	Time Reporter Data
<u>Biographical Details tab</u> ☐ Effective Date ☐ Add Name (exactly as it appears on Social Security Card) ☐ DOB ☐ Gender ☐ National ID (SSN) *<u>Contact Information tab</u>* ☐ Add Address ☐ Phone Numbers ☐ Email *<u>Regional tab</u>* ☐ Ethnic Group *<u>Organizational Relationship tab</u>* ☐ Add Relationship ☐ Note Empl ID #___________________ **IMPORTANT! If you stop here and come back to complete Job Data, must resume on the Add Employment Instance screen.**	*<u>Work Location tab</u>* ☐ Effective Date (start date) ☐ Action (Hire) ☐ Reason ☐ Job Indicator ☐ Position Number *<u>Job Information tab</u>* ☐ Empl Class ☐ Review fields from Position *<u>Job Labor tab (skip this tab)</u>* *<u>Payroll tab</u>* ☐ Absence System (NOTE: If this is selected, you must also select a Paygroup under Absence Management System (AMS) ☐ Pay Group ☐ Employee Type ☐ FICA Status ☐ (AMS) Paygroup *<u>Salary Plan tab</u>* ☐ Step ☐ Step Entry Date *<u>Compensation tab</u>* ☐ Default Pay Components ☐ Verify Apply FTE Checkbox is checked (Conversion tab) ☐ Rate Code Frequency ☐ Compensation Rate Frequency ☐ Calculate Compensation *<u>SDCOE Job Data tab</u>* ☐ Checkbox months Employee receives a check (this should match the Comp Rate Frequency on Compensation tab) **IMPORTANT!** **Save Job Data <u>NOW</u>**	**After Job Data is saved:** *Employment Data > Time Reporter Data > Time and Labor Data window* **Required for Time & Labor:** ☐ Effective Date (start date) ☐ Time Reporter Type ☐ Elapsed Time Template ☐ Time Period ID ☐ Workgroup ☐ Taskgroup **Assign a Work Schedule** **IMPORTANT! Must do for Salaried and Exception Hourly Employees.** *Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule* ☐ Effective Date (start date) ☐ Assignment Method (Select Predefined) ☐ Schedule Group (SDCOE) ☐ Schedule ID **Other Items (if applicable)** *HR Items:* ☐ Multiple Components of Pay (MCOP) ☐ TB Test

Workgroups and Taskgroups

Description	Empl Class	Conditions	Workgroup	Taskgroup
Superintendent	Supt		nn-SUP	SDCOE
Board Member	BrdMember		nn-BOARD	SDCOE
Certificated Administrator	CertAdmin		nn-CER-MGT	SDCOE
Certificated Management	Certif/Mgr		nn-CER-MGT	SDCOE
Certificated Salaried	Certificat	Employee Type = Salaried	nn-CER-ANN	SDCOE
Certificated Hourly	Cert/Hrly	Employee Type = Hourly	nn-CER-HLY	POSPAY (Pos Pay Combo Code Required)
Classified Manager	Class/Adm		nn-CLA-MGT	SDCOE
Classified Salaried	Classified	Employee Type = Salaried	nn-CLA-ANN	SDCOE
Classified Hourly (not Exception Hourly)	Class/Hrly	Employee Type = Hourly	nn-CLA-HLY	POSPAY (Pos Pay Combo Code Required)
Classified Hourly (Exception Hourly)	Class/Hrly	Employee in Exception Hourly list	nn-EXC-FIX	SDCOE
Confidential	Confident		nn-CNF-SUP	SDCOE
Student Workers	StdWorkers		nn-CLA-HLY	POSPAY (Pos Pay Combo Code Required)
Substitutes	Sub Teach	Job Code = 11220 (Substitute Teacher) or 11920 (Substitute Teacher Charter School)	nn-SUB-TEA	POSPAY (Pos Pay Combo Code Required)
Substitutes		CER-DLY is used for certificated employees that work on a daily basis (not subs). Example: Psychologist that comes in on occasion, or a certificated coordinator that works at a district temporarily.	nn-CER-DLY	POSPAY (Pos Pay Combo Code Required)
Substitutes	Class/Hrly		nn-CLA-HLY	POSPAY (Pos Pay Combo Code Required)
Retiree Certificated	Retiree		nn-CER-RRA	SDCOE
Retiree Classified	Retiree		nn-CLA-RRA	SDCOE

Benefits Administration – Benefit Elections/Dependent & Beneficiary Checklist

Create an Event

When qualifying job events such as new hires, position changes, rehires, or terminations with benefits are saved by HR on Job Data, the event will automatically be added to the **BAS Activity Table** and open up benefits allowing for election entries/changes. You may skip to **Adding Benefits**.

When qualifying life events such as marriage, birth, divorce, etc. are saved by HR on the job record, these events must **MANUALLY** be added to the **BAS Activity Table** before benefits will open up and allow for election entries/changes.
Main Menu > Benefits > Manage Automated Enrollment > Events > Review BAS Activity

- ☐ Click the plus sign (+) to add a new row
- ☐ Enter the Empl ID, event date, and BAS Action
- ☐ Click Save

403(b) and other Savings Plan enrollments/changes that need to be made are treated like a life event in that they must also be **MANUALLY** added to the **BAS Activity Table**. Follow the steps above but select the BAS Action of 403.

Adding Benefits
Main Menu > Benefits > Manage Automated Enrollment > Events > On Demand Event Maintenance

- ☐ Click in the Empl ID field, enter the employee ID, click Search
- ☐ Click Schedule/Prepare Activity, then click OK (**NOTE**: If the event you are processing was entered before today, it was likely processed in the batch Ben Admin processing that occurs automatically every night. If this is the case, this button will be gray and you can skip to the next step).
- ☐ Click Election Entry

If you need to enter **Dependents/Beneficiaries**, follow these steps. If no Dependents/Beneficiaries need to be added, continue to the next step of steps under the **Enter Elections** area below.

- ☐ Click the Dependents/Beneficiaries tab
- ☐ Click the Change/Add Dependent link
- ☐ Click Edit Name
- ☐ Enter the Dependent's first name, last name, then click OK
- ☐ Click the Address tab and either click Edit Address to enter address, or check the Same Address as Employee checkbox
- ☐ Enter the dependent's phone number in the Phone field, or check the Same Phone as Employee checkbox
- ☐ Click the Personal Profile tab and enter the dependent's DOB, Relationship to Employee, Gender, Marital Status, and National ID.
- ☐ Check the Primary ID checkbox
- ☐ Click OK

Enter Elections

- ☐ Click the Option Election tab
- ☐ Find the plan types the employee is choosing to opt-into, then click the Option Code lookup icon to select the employee's elections

- ☐ OPTIONAL: If the employee has dependents/beneficiaries that need to be added to a plan, either click the Enroll All button under each plan or use the ID lookup icon to select the dependents/beneficiaries individually
- ☐ OPTIONAL: Enter % of benefits each beneficiary is entitled (typically only necessary on life/savings plans).
- ☐ After entering all elections, click OK at the bottom of the page
- ☐ You will be returned to the On-Demand Event Maintenance page
- ☐ Click Validate/Finalize (IMPORTANT! Skipping this step will leave the enrollments in a "holding" state and deductions will not be taken)
- ☐ Click OK
- ☐ OPTIONAL: You may click Confirmation Statement to see a report summary of the employee's selected plans and elections

Making Changes

The way that you handle employee plan or election changes will depend on the reason a change needs to be entered. Under normal circumstances, a qualifying event needs to occur before changes can be made. Some of these qualifying events will automatically be added to the BAS Activity Table (job events), and others will manually need to be added (life events), as discussed in the *Create an Event* section of this checklist.

Scenario A: You need to modify elections that were entered incorrectly

- ☐ Navigate to *Main Menu > Benefits > Manage Automated Enrollment > Events > On Demand Event Maintenance*
- ☐ Click Event Status Update
- ☐ Find the last event during which the mistakes were entered
- ☐ Click in the **Process** dropdown list and select the **Re-Enter** list item
- ☐ Click in the **Event Status** dropdown list and select the **Open for Processing** list item
- ☐ Scroll to the bottom of the page and click OK
- ☐ Click the Reprocess button
- ☐ The Election Entry button will light up allowing you to click it
- ☐ Enter plan changes
- ☐ Click OK after all changes have been made
- ☐ Click Validate/Finalize

Scenario B: You need to make Savings Plan changes

- ☐ Navigate to *Main Menu > Benefits > Manage Automated Enrollment > Events > Review BAS Activity*
- ☐ Click the plus sign (+) to add a new row
- ☐ Enter the Empl ID, event date, and BAS Action = 403 (403(b) Changes)
- ☐ Click Save
- ☐ Navigate to *Main Menu > Benefits > Manage Automated Enrollment > Events > On Demand Event Maintenance*
- ☐ Click in the Empl ID field, enter the employee ID, click Search
- ☐ Click Schedule/Prepare Activity, then click OK (**NOTE**: If the event you are processing was entered before today, it was likely processed in the batch Ben Admin processing that occurs automatically every night. If this is the case, this button will be gray and you can skip to the next step).
- ☐ Click Election Entry
- ☐ Find the Savings Plan and enter changes (make sure all amounts fields are populated)
- ☐ Click OK at the bottom of the page
- ☐ Click Validate/Finalize

Scenario C: It is Open Enrollment and you need to enter employee plan changes

- ☐ Navigate to *Main Menu* > *Benefits* > *Manage Automated Enrollment* > *Events* > *Review BAS Activity*
- ☐ Click the plus sign (+) to add a new row
- ☐ Enter the Empl ID, event date, and BAS Action = ADM (Administrative)
- ☐ Click Save
- ☐ Navigate to *Main Menu* > *Benefits* > *Manage Automated Enrollment* > *Events* > *On Demand Event Maintenance*
- ☐ Click in the Empl ID field, enter the employee ID, click Search
- ☐ Click Schedule/Prepare Activity, then click OK
- ☐ Click Election Entry
- ☐ Enter plan changes
- ☐ Click OK at the bottom of the page
- ☐ Click Validate/Finalize

Scenario D: A qualifying job event has occurred on the employee's job record, and you need to enter his/her plan changes

- ☐ Navigate to *Main Menu* > *Benefits* > *Manage Automated Enrollment* > *Events* > *On Demand Event Maintenance*
- ☐ Click in the Empl ID field, enter the employee ID, click Search
- ☐ Click Schedule/Prepare Activity, then click OK
- ☐ Click Election Entry
- ☐ Enter plan changes
- ☐ Click OK at the bottom of the page
- ☐ Click Validate/Finalize

Scenario E: You need to enter a qualifying life event for an employee, then make any necessary plan changes

- ☐ Navigate to *Main Menu* > *Benefits* > *Manage Automated Enrollment* > *Events* > *Review BAS Activity*
- ☐ Click the plus sign (+) to add a new row
- ☐ Enter the Empl ID, event date, and a BAS Action = FSC (Family Status Change), or BIR (Birth), or DIV (Divorce), or MAR (Marriage)
- ☐ Click Save
- ☐ Navigate to *Main Menu* > *Benefits* > *Manage Automated Enrollment* > *Events* > *On Demand Event Maintenance*
- ☐ Click in the Empl ID field, enter the employee ID, click Search
- ☐ Click Schedule/Prepare Activity, then click OK
- ☐ Click Election Entry
- ☐ Enter plan changes
- ☐ Click OK at the bottom of the page
- ☐ Click Validate/Finalize

Opting-Out of / Ending Benefits

- ☐ Depending on the scenario that is ending an employee's benefits, you will follow the appropriate steps from the *Making Changes* section above
- ☐ When you reach the step where you would enter plan changes, you will use the Option Code looking glass to select the **Waive** option
- ☐ Repeat the step above for each plan type that need to be ended
- ☐ Click OK at the bottom of the page
- ☐ Click Validate/Finalize

Time & Labor – Entering Time Checklist

Time Reporter Data Screen

- ☐ The Effective Date must be equal to or before the first day you want to begin entering time for the employee.
- ☐ The Status must be Active.
- ☐ The Send Time to Payroll box must be checked.
- ☐ The employee must be assigned to a Workgroup.
- ☐ The employee must be assigned to a Taskgroup.

Dynamic Group Refresh

Dynamic Group Refresh adds a new employee to their district's Time Reporter Group so time can be entered on the Timesheet screen. The Dynamic Group Refresh process runs automatically every hour on the hour. For example it runs at 7:00 a.m., 8:00 a.m., 9:00 a.m., and so forth. If necessary, Dynamic Group Refresh can be run manually by following the steps below.

- ☐ Navigate to *Main Menu > Set Up HCM > Security > Time and Labor Security > Refresh Dynamic Group(s)*.
- ☐ Click the Search button to list any existing run control ids for the Dynamic Group Refresh process.
- ☐ If no ids exist, click the Add a New Value tab, type *TL_Dynamic_Group_Refresh* in the box beside Run Control ID and click Add.
- ☐ On the Refresh Dynamic Group(s) screen click the box beside Refresh All Dynamic Groups to remove the checkmark. This will open a new Groups to be Refreshed section.
- ☐ Click the lookup tool beside the box under Group ID and select the district's Time Reporter Group, for example select the one for all active employees.
- ☐ Click Run to run the Dynamic Group Refresh process.
- ☐ Click the Process Monitor link then the Refresh button to follow the progress. A Run Status of Success and Distribution Status of Posted means the process finished. Click the Go back to Refresh Dynamic Group(s) link then Return to Search.

Job Data Screen (optional, only if the employee has leave entitlement)

- ☐ Click the Payroll tab on the Job Data screen.
- ☐ The Absence System in the Payroll Information section must be equal to Absence Management.
- ☐ A Pay Group must be selected in the Absence Management System section.

Payroll – New Hires Checklist

Add Additional Pay	Add General Deductions
Create Additional Pay ☐ Earnings Code ☐ Effective Date ☐ Addl Seq Nbr ☐ Earnings ☐ OK to Pay ☐ Percent of Base (checkbox) ☐ Percent of Base ☐ Applies to Pay Periods - First *Override Additional Pay (EmplID)* ☐ Select/Deselect Additional Pay Periods **IMPORTANT!** Multiple Components of Pay (MCOPs) are established as a part of Human Resources at *Main Menu* > *Workforce Administration* > *Job Information* > *Job Data*.	*Create General Deductions* ☐ Deduction Code ☐ Effective Date ☐ Calculation Routine ☐ Flat/Addl Amount ☐ Goal Amount *Override Deductions (Employee)* ☐ Select/Deselect Deduction Override Settings **IMPORANT!** A Workers Compensation deduction must be established for all covered employees. Effective date should be employee date of hire.

Please continue to the next page.

Add Employee Tax Data	Establish Direct Deposits
Federal Tax Data ☐ Effective Date – *Employee date of hire.* ☐ Tax Marital Status ☐ Withholding Allowances ☐ Additional Amount ☐ Additional Percentage ☐ Lock-In Letter/Limit on Allowances ☐ Effective Date ☐ Tax Marital Status *State Tax Data* ☐ State ☐ Resident ☐ UI Jurisdiction ☐ Exempt from SUT ☐ State Disability Insurance ☐ Tax Marital Status ☐ Withholding Allowances ☐ Additional Amount ☐ Additional Percentage ☐ Special Withholding Tax Status ☐ Lock-In Letter/Limit on Allowances **IMPORANT!** Board Members and Student Workers are exempt from SUT	*Request Direct Deposit* ☐ Effective Date ☐ Status ☐ Bank ID ☐ Add a New Bank **(Not Used)** ☐ Prenotification Required ☐ Account Type ☐ Deposit Type ☐ Net Pay Percent ☐ Net Pay Amount ☐ Priority ☐ Account Number

Data Entry Audit Error Messages

The Data Entry Audit identifies missing records, invalid data combinations, or inaccurate data. All errors identified by this query should be corrected prior to the next payroll calculation.

Navigation: Main Menu > Reporting Tools > Query > Query Viewer

1. Navigate to **Main Menu > Reporting Tools > Query > Query Viewer**.
2. Enter the Query Name. M_DATAENTRY_AUDIT
3. Click **Search**.
4. For the desired query, click either **HTML** or **Excel**.

Data Entry Errors

Message/Description	Resolution	Screen Navigation
(00) - Incorrect Workgroup for District	Correct the Workgroup code in the Time and Labor Data record.	Main Menu > Workforce Administration > Job Information > Job Data > Employment Data link > Time Reporter Data link
(01) - Missing or inactive Time Reporter Data record	Create an employee Time and Labor Data Record	Main Menu > Workforce Administration > Job Information > Job Data>Employment Data link >Time Reporter Data link
(02) - Missing Workers Comp Deduction Record	Create an employee General Deduction Record for Deduction Code (XXX) WCP, (District No.) Workers Comp.	Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions
(03) – Missing Federal Tax Data	Create an employee Federal Tax data record.	Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data
(04) - Missing State Tax Data	Create an employee State Tax data record.	Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data
(05) – Job FTE (Value 1) does not match Position FTE (value2)	Contact CRC staff for correction.	Main Menu > Workforce Administration > Job Information > Job Data > Job Information Tab Main Menu > Organizational Development > Position Management > Maintain Position/Budgets > Add/Update Position Info > Specific Information Tab, Education and Government
(06) – Missing Salary Step on Job Record	Add Salary Step to the employee Job Data/Salary Plan Tab	Main Menu > Workforce Administration > Job Information > Job Data > Salary Plan Tab

Message/Description	Resolution	Screen Navigation
(07) – Comp Frequency (Value1) invalid for this Full/Part Time value (Value2)	Either Compensation Frequency or Full/Part Time Field must be corrected for valid combinations.	Main Menu > Workforce Administration > Job Information> Job Data > Compensation Tab Main Menu > Organizational Development > Position Management > Maintain Position/Budgets > Add/Update Position Info > Description Tab
(08) – 10/11 Month employee with incorrect Pay Schedule flags. (Value 2) shows flags for months JFMAMJJASOND	The number of selected Pay Schedule months on SDCOE Job Data tab must agree with the Full/Part Time code on the Job Information Record.	Main Menu > Workforce Administration > Job Information > Job Data > SDCOE Job Data Tab Main Menu > Workforce Administration > Job Information > Job Data > Job Information Tab
(09) – Incorrect Full/Part Value (Value1) for this Empl Class (Value 2)	Full/Part Code, and the Empl Class are not valid combinations. Empl Class may be corrected on Job Data, Full/ Part may be corrected on Position Data.	Main Menu > Workforce Administration > Job Information > Job Data > Job Information Tab
(10) – Additional Pay without First Pay Period field Checked.	The First Pay Period check box, must be checked within Applies to Pay Periods.	Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay
(11) – Employee NAANNL comp rate (Value 1) does not match Salary Step annual comp rate (Value 2) Plan XXX, Grade XXX, Step XXX	The comp rate must agree with the Salary Schedule, and should not be overridden at the Job data level.	Main Menu > Workforce Administration > Job Information > Job Data > Compensation Tab
(12) – Employee NAHRLY comp rate (Value 1) does not match Salary Step hourly comp rate (Value 2) Plan XXX, Grade XXX, Step XXX	The comp rate must agree with the Salary Schedule, and should not be overridden at the Job data level.	Main Menu > Workforce Administration > Job Information> Job Data > Compensation Tab
(13) – Substitute in non-sub time/Labor Workgroup	The workgroup must agree with the position.	Main Menu > Workforce Administration > Job Information > Job Data > Employment Data > Time Reporter Data > Workgroup
(14) – Invalid Comp Frequency for Empl Type	The Frequency code must agree with the Empl Type, 10, 11, or 12 month employee.	Main Menu > Workforce Administration > Job Information > Job Data > Compensation Tab > Frequency
(15) – Certificated-type Empl Class without CDAYS	Missing CDAYS on Position	Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info > CDAYS Tract Tab