Human Capital Management: *Streamline Guide*

Hiring a New Employee (Direct Hire)

This guide lists only the steps for hiring a new hire (no contract), for whom there are no records already in HCM.

CAUTION: To avoid errors and duplication in HCM, it is important that people added to the system do not already have a record. Before you add a new employee to hire, run the Job List query (CUES_HCM_JOB_LIST) to make sure the person you are adding does not already exist in the system. The Job List query identifies employees that may not be in your role-level security. The query lets you search by Employee ID, Department ID, Job Code, the last four digits of the SSN, first name, last name and the position number. If you do not know how to run the query, refer to *Hiring an Employee Step-by-Step Guide*.

For more detailed instructions, or to hire an employee on a contract, refer to *Hiring an Employee Step-by-Step Guide*.

Before you begin, you will need:

- Personal information, including date of birth and national ID of person you are hiring.
- A position that has already been created, funded, and approved. For information about creating a position, refer to *Creating a Position with Funding Step-by-Step Guide*.
- Effective date, which will be the hire date.

To perform a direct hire of a new employee:

1. From the HCM Community Users dashboard, click **Transaction Launch Page**.
2. Enter **Last Name** and any additional information such as date of birth and Social Security number.
3. From the **Search Option** list, select **Hire/Rehire/Additional Job**.
4. Click **Search**. The system should display **No ATS matching values found** and **No HCM matching values found**.
5. Verify the person does not exist in the **HCM Data**.

> If the person appears in the HCM Data, **STOP**. This is either a Rehire of a terminated employee or a hire of a POI. Refer to *Hiring an Employee Step-by-Step Guide* for more detailed instructions.

6. Select the **Add a Person** checkbox.
7. Click **Submit**. A message appears, asking if this is a contract employee.
8. Select **No**.
9. In the Name section, select an **Effective Date**. This is the date this person becomes a record in the system. This date defaults to today's date.
10. Click **Add Name**.
11. Type **First Name** and **Last Name** and click **OK**.
12. Type or select **Date of Birth**.

13. Select **Sex**.
14. Select **Gender Identity** (optional). To reveal the Gender Identity field, select **USA** from the **Regulatory Region** dropdown.
15. Select **Highest Education Level**.
16. Select **Marital Status**, if known.
17. In the National ID section, type a **National ID** (Social Security number).
18. Select the **Contact Information** tab.
19. Click **Add Address Detail**.
20. Click **Add Address**.
21. Type address information and click **OK**.

    Notes:

    - HCM copies Home to Mailing (and vice versa) overnight. If these addresses are different (e.g., students), enter both.
    - State tax withholding is determined by mailing address.
22. Click **OK**.
23. Select **Phone Type**.
24. Type phone number.
25. Click **Preferred**.
26. Select **Email Type**.
27. Type email address.
28. Click **Preferred**.
29. Click **Regional** tab.
30. Select **Ethnic Group**.
31. Select **Military Status**.
32. If you have the E-Verify and background check information, click the **CU Personal Data** tab and enter it. the E-Verify and background check information if you have it.
33. Click the **CU Personal Data I9** tab and enter the I-9 information if you have it.
34. Click **OK**. The Enter Transaction Details page appears displaying system generated Empl ID. (Make a note of this ID to use when checking pending approval status.)
35. Select the **Job Effective Date**. (Hire Date)
36. From the **Reason Code** list, select **New Hire**.
37. Click **Continue**. The Enter Transaction Information page appears.

38. From the **Position Number** field, type the position number or select it from the lookup. When you tab off the field, or select it from the lookup, HCM populates default information from Position data.

    Notes:

    - A position **must** be in an Approved status to complete a template-based transaction (TBT).
    - If the position information default values are not correct, stop and click **Save as Draft**. You can then update the position. Once the position is approved, you can then complete this transaction.

39. If needed, select an **Officer Code**. The default is **None**.
40. If needed, select a **Pay Group**. The default is based on the most common pay groups by job code and is editable.
41. From the **Employee Type**, select either **H** (Hourly) or **S** (Salaried).
42. Select **Compensation Frequency**.
43. Select **Comp Rate Code**. This value defaults based on compensation frequency.
44. Type a **Compensation Rate** that is correct for the employee type.
45. If needed, add other components of pay. Must have at least one and can have up to three.
46. If needed, type or select an **Appointment End Date** that can be used for reporting purposes.
47. In the **Comments** section, enter any necessary note. When this hire transaction is approved, these comments populate Job Notes in Job Data.
48. If needed, attach documents.
    a. Click **Add Attachment**.
    b. In **Attachment Title** field, type a name for this document, such as Offer Letter.
    c. Click **Add** .
    d. Click **Choose File**.
    e. Select a file and click **Open**.
    f. Click **Upload**.
49. Click **Save and Submit for Approval**. A message appears with the TBT Request ID. Make a note of the request ID so you can find information about its status later.
50. Click **OK** from the message box. A Further Processing Required page appears.
51. Click **OK**.