

## Table of Contents

<b>Hiring a New Employee</b> .....	2
<b>Completing the CSU Departmental Person/Assignment Form</b> .....	4
<b>Completing the Tabs</b> .....	6
<b>Personal tab</b> .....	6
<b>Employment tab</b> .....	7
<b>Office Details tab</b> .....	7
<b>Further Name tab</b> .....	9
<b>Address Information</b> .....	10
<b>Updating an Address</b> .....	11
<b>Telephone Information</b> .....	11
<b>Extra Information</b> .....	12
<b>NOTE: Hiring a New Student Employee</b> .....	13
<b>Special Information</b> .....	14
<b>Special Information categories</b> .....	14
Additional Supervisor.....	14
Awards and Honors.....	15
Directory Information.....	15
Education.....	16
Emergency Contact Information.....	18
Employee Leave Balances.....	18
I-9 User Roles.....	18
Languages.....	18
Licenses and Organizations.....	18
Salary Authority Dept.....	18
Tenure Information (Faculty).....	18
TimeClock Plus HR Dept Role.....	18



## Hiring a New Employee

If a new employee was hired through the Talent Management System (TMS) or already has been employed at CSU, they should already exist in the HR system. Before entering a new employee in the HR system, please ensure that the individual is not already in the system by using the **CSU New Concurrent Asg/Re-Hire** form as described below. The **CSU New Concurrent Asg/Re-Hire** form will allow you to search the HR system database to verify the employee is not working for another department or a previous employee of another department.

From the Navigator menu, open **CSU New Concurrent Asg/Re-Hire**.

The screenshot shows a web browser window titled "CSU New Concurrent Asg/Re-Hire". The form is divided into three steps:

- STEP 1 Fill in the Effective Date**: A text input field for "Effective Date:" with a yellow highlight and a calendar icon.
- STEP 2 Enter SSN or CSU ID and search for the person**:
  - Input fields for "SSN:" and "or CSU ID:" with yellow highlights.
  - A "Search for person" button.
  - Below these are input fields for "Employee No.:", "Date of Birth:", "Full Name:", and "CSU Id:".
- STEP 3 Enter Assignment Info. and press the Create button**:
  - Input fields for "Employee Group:", "Payroll:", and "Pay Basis:" with yellow highlights.
  - A checkbox for "Summer Session".
  - A "Create assignment" button at the bottom.

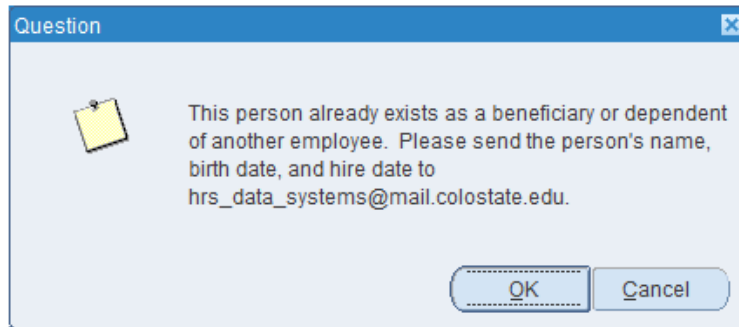
Enter the hire date in the **Effective Date** field in the date format of dd-mmm-yyyy (01-Jan-2020).

Enter the new hire SSN in the **SSN** field. The dashes need to be entered when entering the SSN. Press 'Tab' or click on the 'Search for person' button.

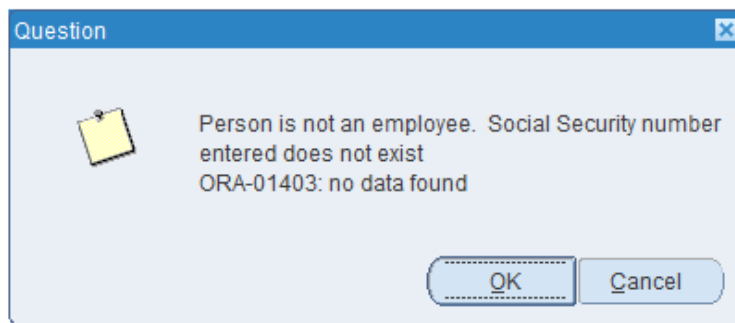
If the new hire's name appears in the **Full Name** field under STEP 2, please turn to the [Completing Assignment Information User Guide](#) for instructions on creating a new concurrent assignment.

The following message will display ("This person already exists...") if the person is a beneficiary of another employee. Click 'OK', close the **CSU New Concurrent Asg/Re-Hire** form and email the following information to [hr\\_is@mail.colostate.edu](mailto:hr_is@mail.colostate.edu)

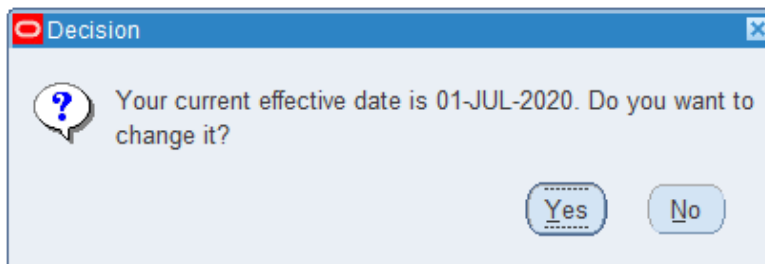
- Full name
- Date of birth
- Hire date
- Last 4 digits of the SSN (**NEVER include an entire SSN in an email**)



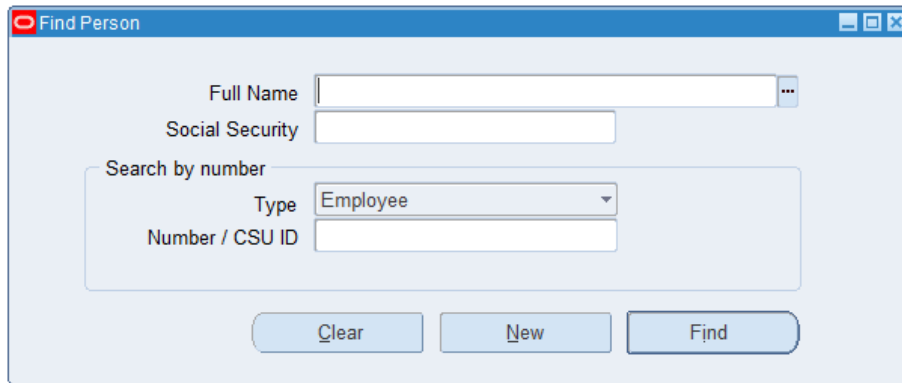
If the following message appears (“Person is not an employee...”), click ‘Cancel’ and close the **CSU New Concurrent Asg/Re-Hire** form and return to the Navigator main menu. Select **CSU Maintain Person** to enter your new employee.



When the **Decision** window asks if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’. The new hire start date entered in Oracle needs to match the hire date in the I-9 Equifax system.

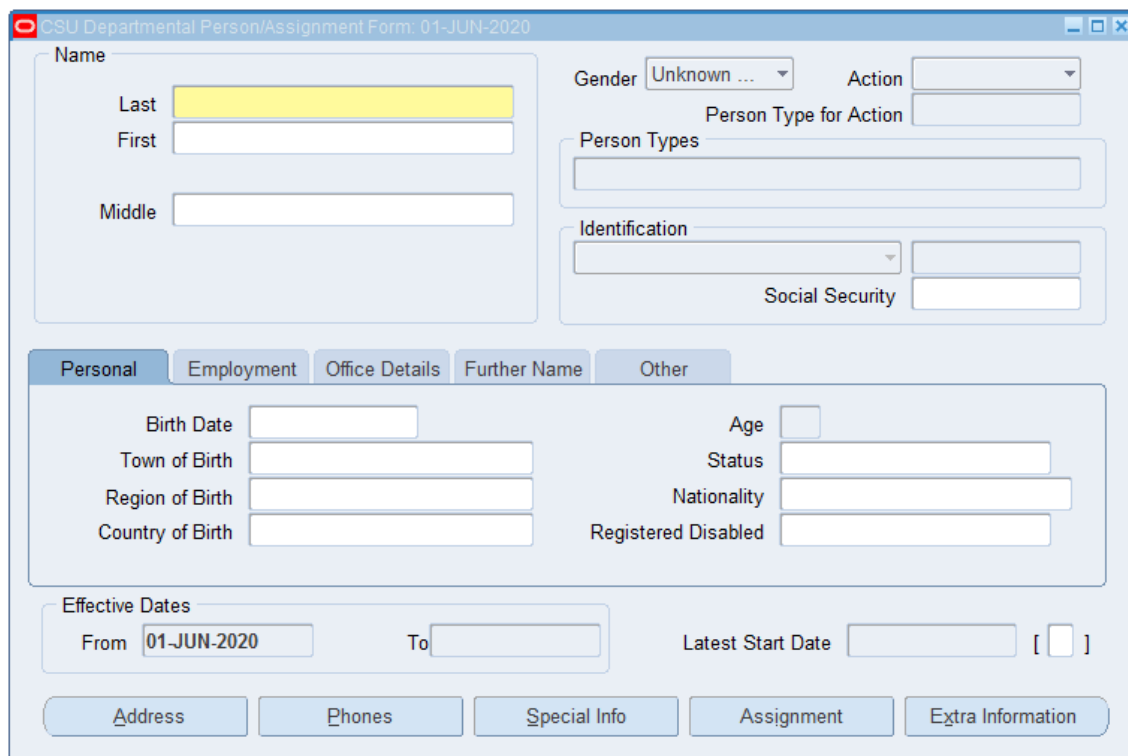


When the **Find Person** window opens, click 'New'



The screenshot shows a window titled "Find Person" with a search interface. It includes text input fields for "Full Name" and "Social Security". Below these is a "Search by number" section with a "Type" dropdown menu set to "Employee" and a "Number / CSU ID" input field. At the bottom, there are three buttons: "Clear", "New", and "Find".

## Completing the CSU Departmental Person/Assignment Form

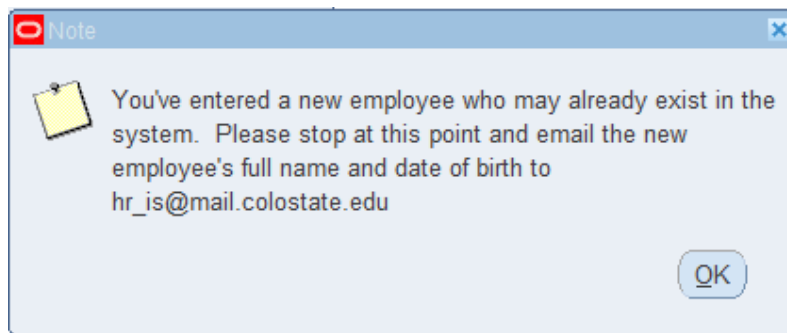


The screenshot displays the "CSU Departmental Person/Assignment Form: 01-JUN-2020". The form is divided into several sections. The "Name" section has fields for "Last", "First", and "Middle". The "Gender" dropdown is set to "Unknown ...". The "Action" dropdown is also visible. Below these are "Person Types" and "Identification" sections. The "Personal" tab is selected, showing fields for "Birth Date", "Town of Birth", "Region of Birth", "Country of Birth", "Age", "Status", "Nationality", and "Registered Disabled". The "Effective Dates" section has "From" set to "01-JUN-2020" and "To" as an empty field. At the bottom, there are buttons for "Address", "Phones", "Special Info", "Assignment", and "Extra Information".

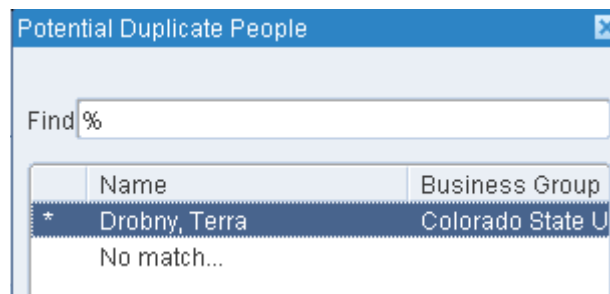
Enter the **Last**, **First**, and **Middle** name fields as they appear on the Social Security Card. If applicable, add the Suffix with the Last name such as 'Williams III'. Do not include punctuation when entering the Suffix or middle initial.

If you receive the following message (“You’ve entered a new employee who may already exist...”) when saving the new hire record, STOP! Click ‘OK’ and close the **Departmental Person/Assignment Form**. Email the following information to [hr\\_is@mail.colostate.edu](mailto:hr_is@mail.colostate.edu)

- Full name
- Date of birth
- Last 4 digits of the SSN (**NEVER include an entire SSN in an email**)
- Hire date

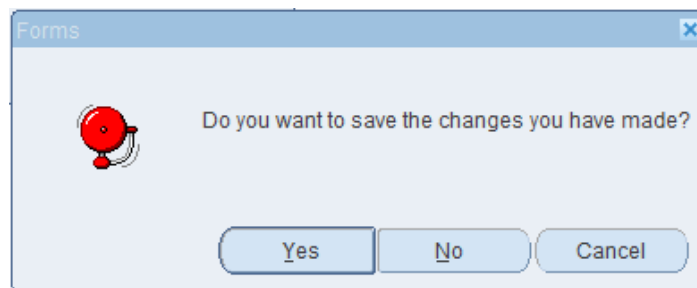


The **Potential Duplicate People** window will appear – click ‘Cancel’ and close the **Department Person/Assignment Form**.



The **Note** regarding the possible duplicate message will display again. Click ‘OK’.

When you receive the message below asking if you want to save the changes – click ‘No’



# Hiring a New Employee

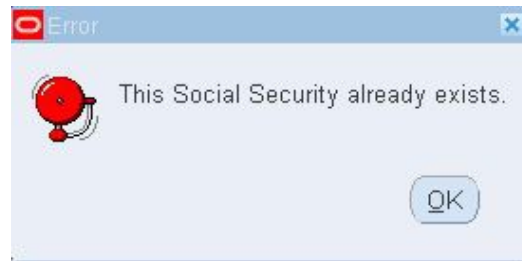
## User Guide

In the **Gender** field, type 'M' or 'F' and press 'Tab' or click the 'down arrow' button to select the correct value from the List of Values (LOV).

In the **Action** field, select **Create Employment** from the LOV then select **Employee**.

Enter the SSN in the **Social Security** field. (Include dashes when entering the SSN)

The message below indicates that the SSN you entered already exists in the HR system.

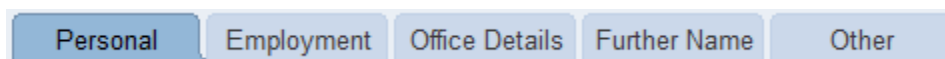


If you receive the message “This Social Security already exists”, click ‘OK’ and close the **Departmental Person/Assignment Form**. Email the following information to [hr\\_is@mail.colostate.edu](mailto:hr_is@mail.colostate.edu)

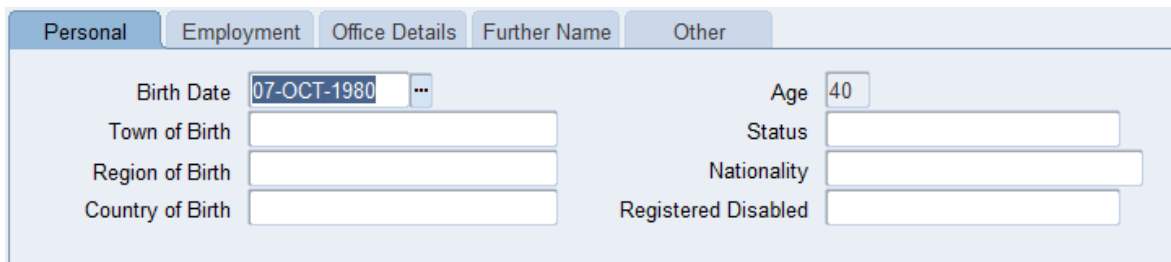
- Full name
- Date of birth
- Hire date
- Last 4 digits of the SSN (**NEVER include an entire SSN in an email**)

## Completing the Tabs

The tabs across the middle of the **Departmental Person/Assignment Form** contain additional information that can be entered by clicking on each tab.



### Personal tab

A screenshot of the 'Personal' tab in a form. The 'Personal' tab is selected and highlighted. Below the tabs, there are two columns of input fields. The left column contains: 'Birth Date' (with a dropdown menu showing '07-OCT-1980'), 'Town of Birth', 'Region of Birth', and 'Country of Birth'. The right column contains: 'Age' (with a dropdown menu showing '40'), 'Status', 'Nationality', and 'Registered Disabled'.

Enter the **Birth Date** using the standard HR date format: dd-mmm-yyyy (01-Jan-2020).

The **Status** field (Marital Status) can be updated by the employee through Employee Self-Service or you can select the **Status** from the LOV.

**Birth** information (**Town, Region, Country**) and **Nationality** are optional.

**Registered Disabled** information is updated by the employee through the Employee Self-Identification Form on the Office of Equal Opportunity (OEO) website. This information should not be entered by the department.

### Employment tab

Personal	<b>Employment</b>	Office Details	Further Name	Other
I-9 Status <input type="text" value="Pending"/>				
I-9 Expiration <input type="text"/>				
New Hire <input type="text" value="Include in New Hire Rep"/>				
Exception Reason <input type="text"/>				
Vets 100A <input type="text"/>				
<input type="checkbox"/> Child Support Obligation				
<input type="checkbox"/> Opted for Medicare				

The **I-9 Status** and **New Hire** fields automatically populate. Do not alter these fields.

HR Records and the Office of Financial Aid Payroll (OFAPay) will update the **I-9 Expiration** date if needed.

**Vets 100A** information is updated by the employee through the Employee Self-Identification form on the Office of Equal Opportunity website. This information should not be entered by the department.

### Office Details tab

Personal	Employment	<b>Office Details</b>	Further Name	Other
Office <input type="text"/>				
Location <input type="text"/>				
Mailstop <input type="text"/>				
Email <input type="text"/>				
Mail To <input type="text"/>				

Enter the office room number in the **Office** field – only 6 digits will be displayed in the Online Directory and the Outlook Address Book.

# Hiring a New Employee

## User Guide

The **Location** is the CSU Building ID that can be found on [Facilities Management](#) webpage.

<u>Campus</u>	<u>Building Name</u>	<u>Building Number</u>
- Any - ▼	Howes Street Business Center ▼	- Any - ▼

***Building Name: Howes Street Business Center***

Official Building Number: 0926

Campus: MAIN CAMPUS

Address:

555 S. HOWES ST.  
FORT COLLINS, CO 80523

### Incorrect

Office	Admissions
Location	Ammons
Mailstop	1062

### Correct

Office	210
Location	0926
Mailstop	

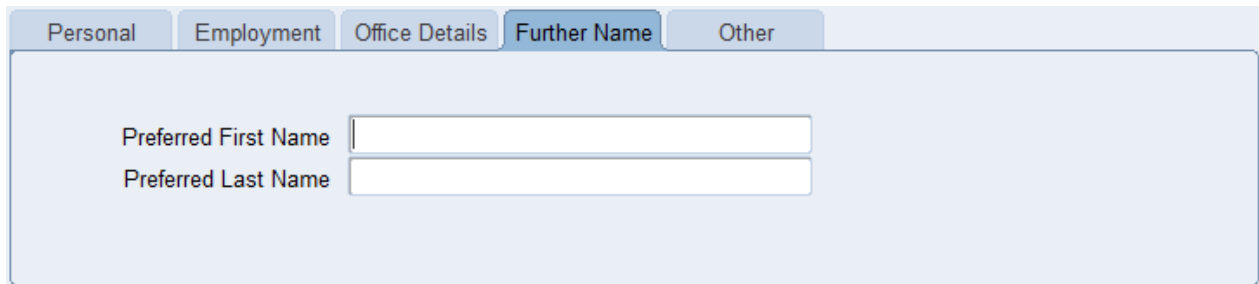
**NOTE:** The **Incorrect** Office and Location examples shown above will appear as Admiss for the Office and the Location will appear as a blank in the Online Directory and Outlook Address Book. The **Correct** Office and Location examples shown above will appear as 210 Howes Street Business Center in the Online Directory and the Outlook Address Book.

The **Email** field will be updated with the CSU email address from the eID system. Personal email addresses should not be entered in this field.

Use the **Mail Option** on **Special Information -> Directory Information** to identify an alternate Campus Delivery code if campus mail should be sent to a campus mail number other than the department mail number.



### Further Name tab



The screenshot shows a user interface with five tabs: Personal, Employment, Office Details, Further Name, and Other. The 'Further Name' tab is currently selected and highlighted. Below the tabs, there are two input fields. The first is labeled 'Preferred First Name' and the second is labeled 'Preferred Last Name'. Both fields are empty and have a light blue border.

The Further Name tab identifies the **Preferred First Name** and **Preferred Last Name**.

The **Preferred First Name** will be populated from the eID system.

Employees can identify a Preferred First Name by logging into the eID system at <https://eid.colostate.edu> and selecting the Modify Your eID link and then selecting Change Preferred First Name.

**Preferred Last Name** is updated by HRIS and can be updated by the employee in Employee Self-Service under Personal Information.

Employees can email [hr\\_is@mail.colostate.edu](mailto:hr_is@mail.colostate.edu) to request a Preferred Last Name. Typically this occurs when someone has a hyphenated last name and only wants one of the last names displayed in the Online Directory and Outlook Address Book.

### Address Information

Oracle does not allow the entry of foreign addresses. If the employee has moved out of the United States and wishes to provide a foreign address for W-2 mailing purposes, please contact HR Payroll at [hr\\_payroll@mail.colostate.edu](mailto:hr_payroll@mail.colostate.edu).

From the **Departmental Person/Assignment Form**, click the 'Address' button. Enter the employee's current mailing **Address** and **Zip Code**. The remaining required fields will be populated when you save the address record.

Address: 123 Prospect Ave

City: Severance State: CO Zip Code: 80550

County: Weld Country: United States

Type: Current Mailing Address  Primary

Effective Dates: From: 01-JUL-2020 To: [ ]

Taxation Address: City: State: County: Zip:

You may receive a pop-up requesting that you select the proper City and County if the Zip Code crosses multiple cities or counties. Select the correct City and County from the list provided and click 'OK'.

City	State	Zip Start	Zip End	County
Severance	CO	80550	80550	Weld
Windsor	CO	80550	80551	Larimer
Windsor	CO	80550	80551	Weld


**NOTE:** The **Effective Dates From** date of the initial address for a new employee needs to match the **Effective Date** on the **Departmental Person/Assignment Form**.

Click 'Save' and close the **Address** form.

### Updating an Address

Employees can update their address through Employee Self-Service.

Alternatively, you can update address information on employee's behalf. To update an address for an employee, you would select **Maintain Person** from the Navigator menu and then click the 'Address' button on the **Departmental Person/Assignment Form**.

- Click the **Green +** icon  to create a new address record
- Enter the address following the instructions for [Address Information](#)
- Click the **Primary** check box on the new address
- **BEFORE** saving the new address, press the 'Page Up' button to open the previous address
- Enter the **To** date as one day prior to the **Effective Dates From** on the new record
- Click 'Save' to save both address records

If the new address has an **Effective Dates From** of 6-JUL-2020 then the **To** date on the previous address should be 5-JUL-2020.

Address records cannot overlap and cannot have a gap between the **To** date on the previous address record and the **From** date of the new address.

### Telephone Information

Employees can update their telephone information through Employee Self-Service.

Alternatively, you can update telephone information on employee's behalf. From the **Departmental Person/Assignment Form**, click the 'Phones' Button.

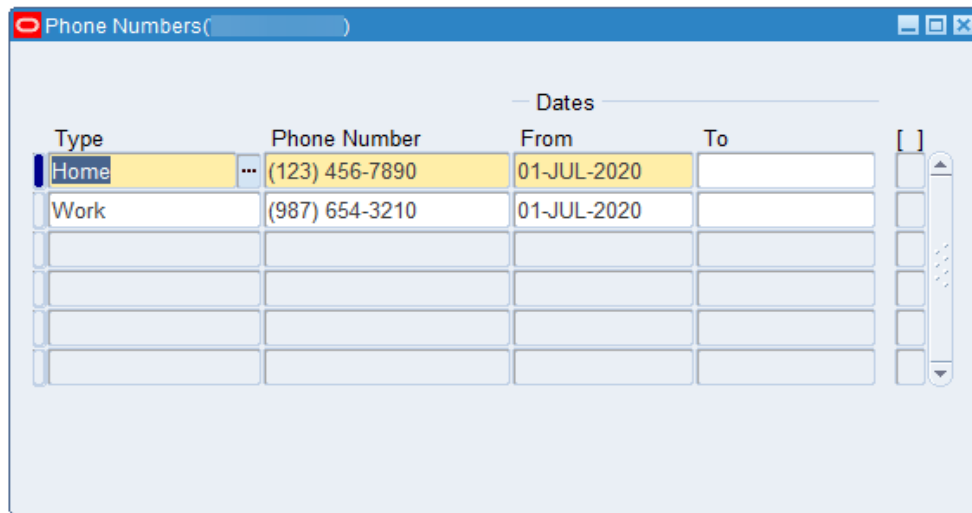
In the **Type** field, enter 'Home' or select a value from the LOV.

In the **Phone Number** field, enter the telephone number including area code. Telephone numbers must be entered in the format: (999) 999-9999

The **From** field defaults to the DateTrack date. You may change this date, if necessary.

Down-arrow to the next line. In the **Type** field, enter 'Work' or select a value from the LOV, and enter the **Phone Number** and **From** fields as above.

Click 'Save' and close the **Phone Numbers** form.

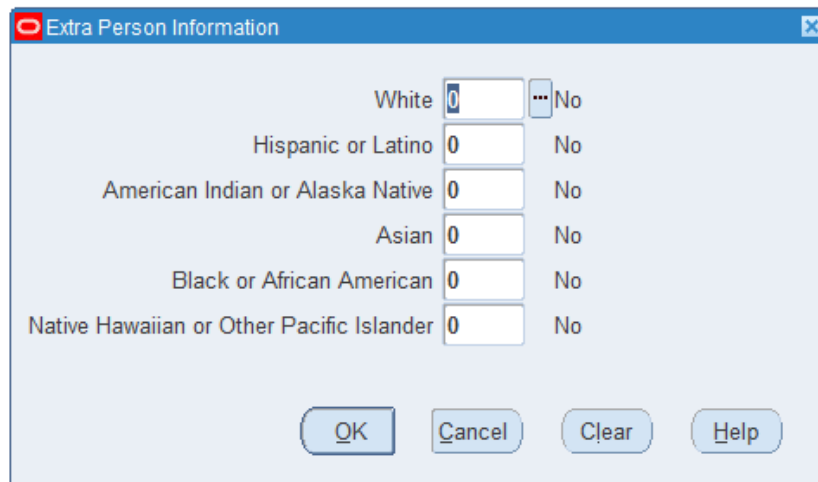


The screenshot shows a window titled "Phone Numbers" with a table containing the following data:

Type	Phone Number	From	To
Home	(123) 456-7890	01-JUL-2020	
Work	(987) 654-3210	01-JUL-2020	

### Extra Information

US Federal Ethnicity and Race Category information is updated by the employee through the Employee Self-Identification Form on the Office of Equal Opportunity website. This information should not be entered by the department.



The screenshot shows a window titled "Extra Person Information" with the following fields:

- White  No
- Hispanic or Latino  No
- American Indian or Alaska Native  No
- Asian  No
- Black or African American  No
- Native Hawaiian or Other Pacific Islander  No

Buttons at the bottom: OK, Cancel, Clear, Help

### **NOTE: Hiring a New Student Employee**

A student can be hired as an employee during the semester in which they are enrolled or one semester prior to being enrolled. If the student is enrolled for the Fall term, they can be hired as a new student employee during the Fall term or during the Summer term prior to their Fall enrollment.

The student CSU ID number needs to be entered in the **Banner CSU ID** field in the 'Beer Mug' fields on the **Departmental Person/Assignment Form** to verify the student enrollment.

The field next to the **Latest Start Date** on the **Departmental Person/Assignment Form** is the 'Beer Mug' field.

Click on the 'Beer Mug' field to open the **Additional Personal Details** form.

Enter the student CSU ID number in the **Banner CSU ID** field, click 'Save' and close the **Additional Personal Details** form.



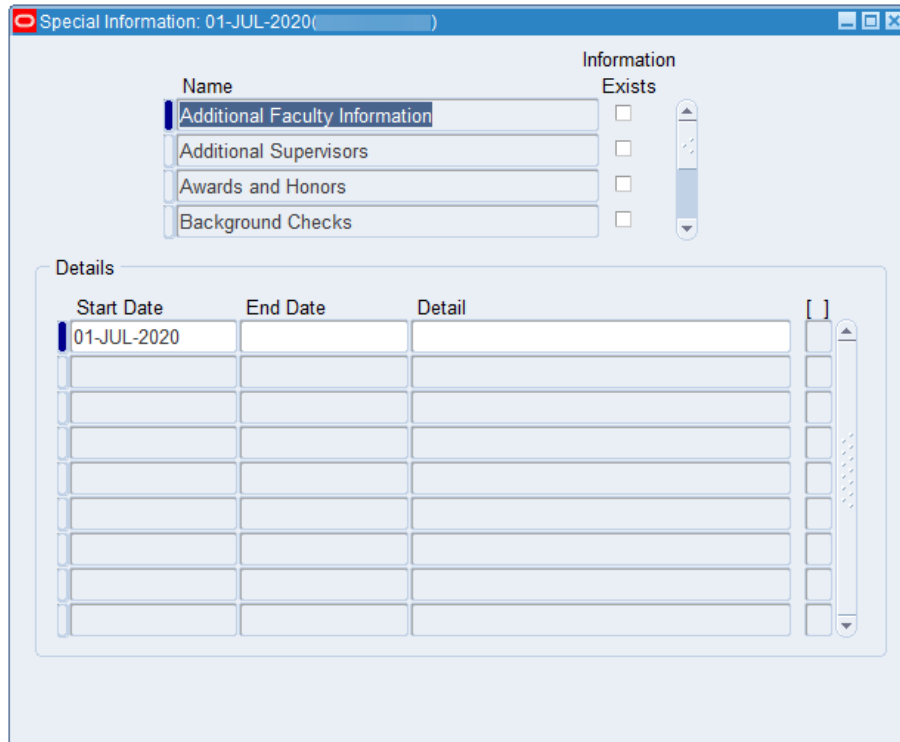
Effective Dates

From 01-JUN-2020 To

Latest Start Date  

### Special Information

From the **Departmental Person/Assignment Form**, click the 'Special Info' button to display the **Special Information** form.



The screenshot shows a window titled "Special Information: 01-JUL-2020". It contains a list of information categories and a details table.

Name	Information Exists
Additional Faculty Information	<input type="checkbox"/>
Additional Supervisors	<input type="checkbox"/>
Awards and Honors	<input type="checkbox"/>
Background Checks	<input type="checkbox"/>

Start Date	End Date	Detail
01-JUL-2020		

To update one of the Special Information categories, scroll down, if necessary and click once in the **Name** field to select the Special Information category.

In the lower half of the form, click in the **Detail** field and either press 'CTRL+L' or click the LOV [...] button to open the flex fields for the specific category.

Once you have added the information, click 'OK' and then click 'Save'.

### Special Information categories

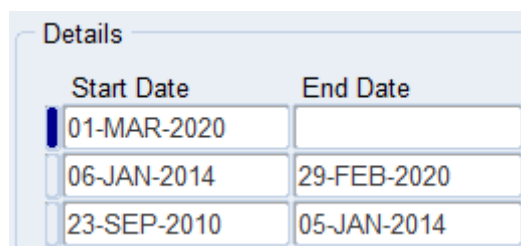
**Additional Supervisor** – The Additional Supervisor can approve time and leave entries in TimeClock Plus in addition to the supervisor listed on the assignment.

Enter the supervisor last name in the **Supervisor** field and press 'Tab' or click the LOV to select an additional supervisor. The **Emp Assignment** field needs to contain the assignment number for which this additional supervisor can approve entries for in TimeClock Plus. If the additional supervisor needs to approve entries for assignment number 123456-5, you need to enter 123456-5 in the **Emp Assignment** field.

**Awards and Honors** – Free form fields identifying **Award Type**, **Award Description**, **Awarded by**, and **Date**.

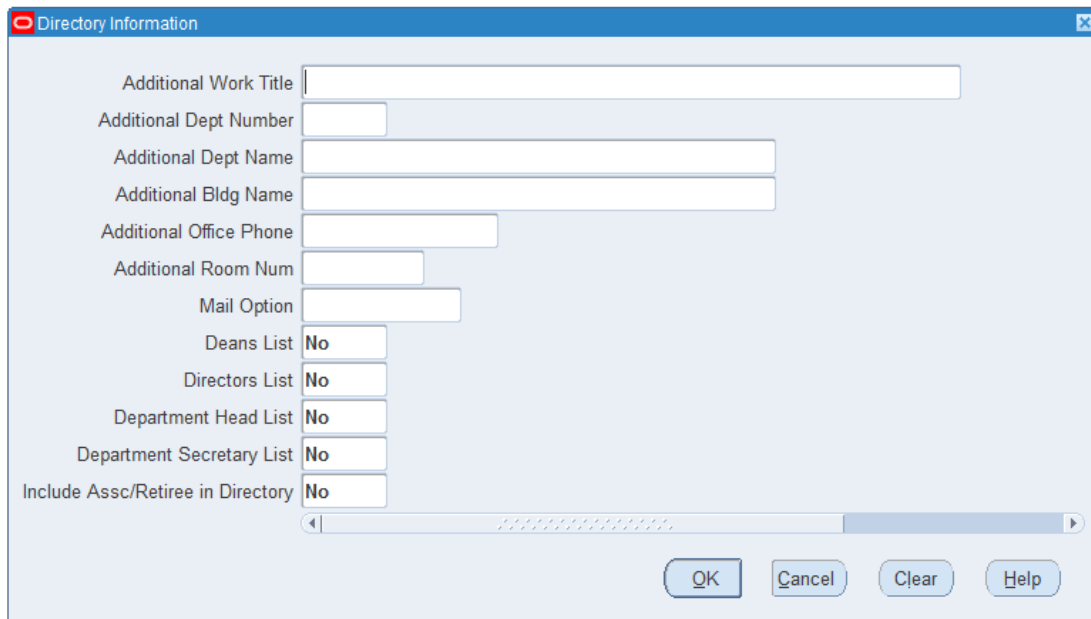
**Directory Information** – Information entered here is used to populate the online directory and the Outlook Address Book. All faculty, administrative professional, state classified, and other salaried employees are included in the directory automatically.

Enter the employee's start date or the effective date of the information change in the **Start Date** field. When updating information, enter a date in the **End Date** of the original entry and create a new entry with a new **Start Date**. Make sure that only one entry includes a **Start Date** and no **End Date**. Two entries with no **End Dates** can create duplicate mailings for employees.



Start Date	End Date
01-MAR-2020	
06-JAN-2014	29-FEB-2020
23-SEP-2010	05-JAN-2014

Click the **Detail** field and press 'CTRL-L' or click the LOV [...] button to open the **Directory Information** form.



Directory Information

Additional Work Title

Additional Dept Number

Additional Dept Name

Additional Bldg Name

Additional Office Phone

Additional Room Num

Mail Option

Deans List

Directors List

Department Head List

Department Secretary List

Include Assc/Retiree in Directory

OK Cancel Clear Help

All fields are optional. The default values are shown above.

**Additional Work Title** – The Additional Work Title is updated from the Talent Management System (TMS) for new hires and new assignments and can be changed by the department HR

representative. This is particularly relevant for employees with multiple assignments. If an Additional Work Title is not listed under Directory Information, the job class of the primary assignment will display in the Online Directory and Outlook Address Book.

**Additional Dept Number and Additional Dept Name** – If the employee works closely with another department on campus, you can select the department number from the LOV and enter the department name. The default department number and name reflect those of the employee's primary assignment.

**Additional Bldg Name, Additional Office Phone, and Additional Room Num** – If the employee has a second office, enter the building name, phone number and office number here. The employee's default office building name and room number come from the Departmental Person/Assignment Form -> Office Details tab. The primary phone number comes from the Departmental Person/Assignment Form -> Phones form.

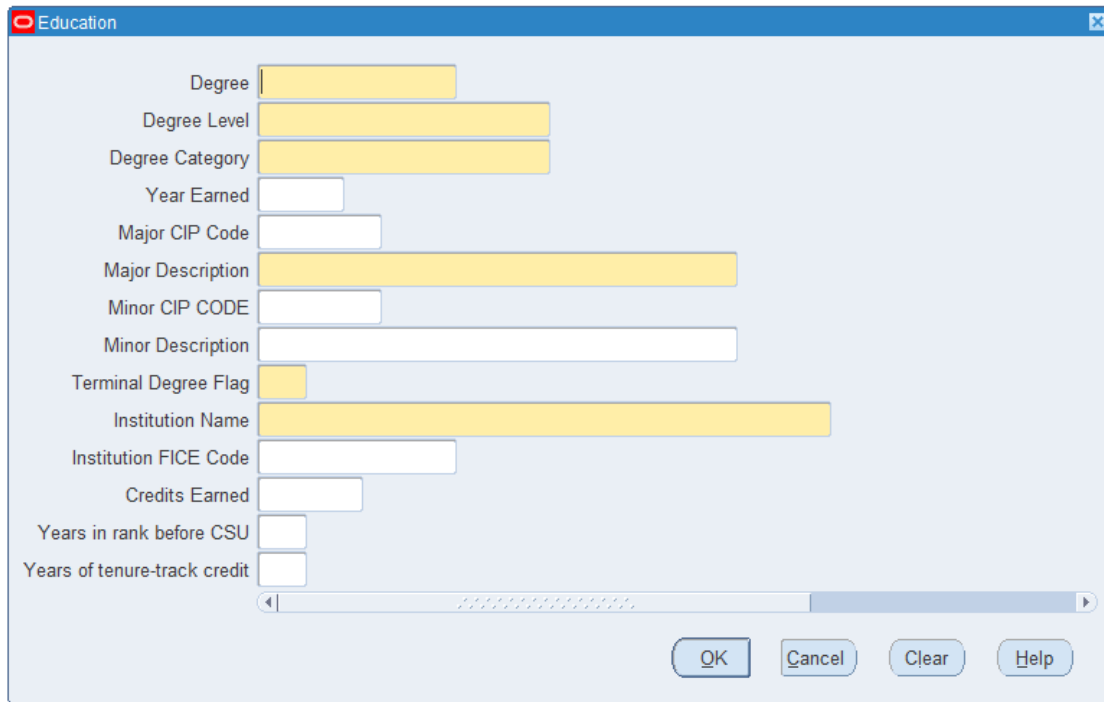
**Mail Option** – The campus delivery location defaults to the employee's primary assignment department campus delivery location. If the employee's mail should be delivered to a different campus delivery location, please choose a value from the LOV.

**Dean, Directors, Department Head, Department Secretary** – If any of these fields are set to 'Yes', the employee will be included in the DDD listserv and receive email notifications relevant to that group.

**Include Assoc/Retiree in Directory** – Enter 'Yes' in this field to display the Associate in the Outlook Address Book under their [first.last@colostate.edu](mailto:first.last@colostate.edu) email address. A 'No' in this field will display the Associate under their eName in the Outlook Address Book and you will not be able to search for them by the last name in the Outlook Address Book.

**Education** – Enter **all** of an employee's degrees – not just the most advanced degree. To add a new education record, click in the next empty Detail field on the Special Information form. Only one should be marked as terminal (if it truly is terminal – the highest attainable degree in that field of study) as that education record will be used in studies by Institutional Research.





The screenshot shows a window titled "Education" with a list of input fields. The fields are: Degree, Degree Level, Degree Category, Year Earned, Major CIP Code, Major Description, Minor CIP CODE, Minor Description, Terminal Degree Flag, Institution Name, Institution FICE Code, Credits Earned, Years in rank before CSU, and Years of tenure-track credit. The input fields for Degree, Degree Level, Degree Category, Major Description, and Institution Name are highlighted in yellow. At the bottom of the window, there are four buttons: OK, Cancel, Clear, and Help.

Enter information using the following formats:

**Degree** – free form text (i.e., M. Science, B. Arts)

**Degree Level** – LOV available (Certification, Graduate, Under Graduate)

**Degree Category** – LOV available (Associates, Bachelors, Doctorate, Masters, Professional)

**Year Earned** – yyyy

**Major CIP Code** – LOV available

**Major Description** – free form text

**Minor CIP Code** – (if applicable) LOV available

**Minor Description** – (if applicable) free form text

**Terminal Degree Flag** – Yes or No (is the degree considered ‘terminal’ or the highest attainable degree in this field?)

**Institutional Name** – free form text

**Institution FICE Code** – LOV available

**Years in rank before CSU** – (i.e., 10)

**Years of tenure-track credit** – (i.e., 5)

**Emergency Contact Information** - The **Name** and **Relationship** fields are required and are free form text fields. The **Name** can be entered as First Name Last Name such as Mary Jones.

**Employee Leave Balances** – Updated at the start of each fiscal year.

**I-9 User Roles** – Identifies the department(s) the employee has access to in Equifax. Updated by HRIS via the HR System Access Request Form.

**Languages** – Selecting ‘Spanish’ from the LOV will change the default language for the employee in TimeClock Plus.

**Licenses and Organizations** – Identifies type of license, date issued, date expired and license number.

**Salary Authority Dept** – This field is used to indicate the department responsible for determining the employee’s annual salary increase.

**Tenure Information (Faculty)** – Updated by HR Records

**TimeClock Plus HR Dept Role** – Identifies the department(s) that employee has department access to in TimeClock Plus. Updated by HRIS via the HR System Access Request Form. Requires a Vice President and/or Provost signature.

Once you have entered the employee information on the **CSU Departmental Person/Assignment Form**, you can proceed to the [Completing Assignment Information User Guide](#). The Completing Assignment Information User Guide will provide information on entering an assignment for a New Hire and creating a New Concurrent Assignment.