NC STATE UNIVERSITY

HR Dashboard & Job Action Request (JAR) Overview
Contents

Functional Summary of the 9.2 Update ..................................................................................................... 3
Basic Overview of JAR Progression .......................................................................................................... 4
  Monitoring the Background Check (BGC) ............................................................................................. 5
Job Action Request (JAR) – SAR Roles ................................................................................................. 6
The HR DASHBOARD Panel .................................................................................................................... 7
  Accessing the HR DASHBOARD .......................................................................................................... 8
  HR Dashboard Hire Options .................................................................................................................. 9
  HR Dashboard Modify Options ........................................................................................................... 10
  HR Dashboard Position Options .......................................................................................................... 11
  HR Dashboard Time & Compensation Options .................................................................................. 12
  HR Dashboard Reporting & Query Tools ............................................................................................ 13
  HR Dashboard Other System Options ................................................................................................. 14
Hire/Rehire Functionality ......................................................................................................................... 15
  STW (Student Worker) Job Request Page ........................................................................................... 16
  TME (Temp-Exempt from FLSA) Job Request Page ........................................................................... 17
  TMS (Temp-Subject to FLSA) Job Request Page ............................................................................... 18
  ZNP (Visitor No Pay) & UNF (Unpaid Non-Faculty) Job Request Page ............................................ 19
  UFC (Unpaid Faculty) JAR Page ......................................................................................................... 20
  PDC (Post Doc), CHO (CVM House Officer) JAR Page .................................................................... 21
  SHRA (Subject to Human Resources Act) JAR Page ......................................................................... 22
  EHRA (Exempt from Human Resources Act) JAR Page .................................................................... 23
  Activity Menu & Task Progression ...................................................................................................... 24
  Attaching Supporting Documents ...................................................................................................... 25
  Worklist Page ....................................................................................................................................... 26
  Promotion / Transfer Page (example for EHRA) ................................................................................ 27
Rapid Rehire Transaction ......................................................................................................................... 28
  Background Check – Disclosure & Release Acknowledgment ............................................................... 29
Modify existing JOB (Students, Temps and No Pays) ........................................................................... 32
Employee Separation (Students, Temps and No Pays) ......................................................................... 34
**Functional Summary of the 9.2 Update**

PeopleSoft 9.2 will offer some new features and help streamline transaction processing for HR campus users. The new HR Dashboard will allow users to select from multiple quick link options accessing specific transaction pages associated with the updated HR System. The “HR Quick Links” will streamline the navigation process using the HR Dashboard, making it easier for users to initiate, modify, review and/or approve transactions.

Job Action Request (JAR) is a new feature with the 9.2 upgrade that utilizes an activity menu to track the progression through the different stages of approval. This document covers the fundamentals of accessing and utilizing the HR Dashboard within the JAR application.

Users with the appropriate security level access or SAR access can initiate hire/rehire transactions, additional jobs, transfers, promotions, and separations using JAR. The JAR process guides the user through the job data pagelets and fields required to initiate a transaction. The individual user’s SAR access will dictate which JAR transactions can be performed within the college division. Once a transaction completes the approval process (Dept./Central HR) it will transition over into job data and the JAR transaction will become a permanent record in the HR system.

Background Checks (BGC) have been incorporated into the JAR as part of the hiring process. The JAR transaction allows the initiator to select which background check options they would like performed based on the job attributes. Once the transaction is submitted, the selected candidate will receive an email notification containing a link to the NC State University portal. For security purposes, a second email will follow the first email providing a user ID and password to log into the portal. The candidate will have two weeks to complete and submit the BGC form back to NC State University for processing. Once the BGC is approved, the transaction will advance to the next stage.

Another new feature within JAR is the ability to attach the hiring paperwork associated with the transaction (e.g. offer letters, reference checks & patent agreement). Transaction approvers can review the attached documents and it will become a part of the permanent record in the HR system.

The JAR tool will streamline the overall hiring process and create a permanent transaction file that can be retrieved in the HR system. College divisions should account for the time it takes to process a JAR transaction through all the approval stages and plan accordingly. Central HR recommends allowing a minimum of two weeks from the start of a JAR transaction to the final stage of approval. If you have questions, consult with your HRIM representative, [https://www.ncsu.edu/human_resources/hrim/csr.php](https://www.ncsu.edu/human_resources/hrim/csr.php).
Basic Overview of JAR Progression

Job Action Requests (JAR) will be new for college division HR representatives, but it is similar to the Start Employment Process (SEP) used in version 9.1. JAR transactions will progress through different stages of approval before migrating over to job data in the HR System. Transaction progression will be similar with both Perm (Faculty, Non-Faculty, Postdocs & Staff) and Non-Perm (Students, Temps & No Pays) hires.

- Perms equate to EHRA, Postdoc or SHRA employee classes
- Non-Perms equate to Students, Temps or No Pay employee classes

*Note:* All Student Graduate (Grad) Transactions should be processed using NextGen

The following table provides an overview of the JAR progression stages. It also indicates when email notifications are sent to the candidate, transaction initiator and transaction approver.

<table>
<thead>
<tr>
<th>JAR Progression Stages</th>
<th>Description</th>
<th>Email Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate JAR</td>
<td>Divisional or Department HR Rep. initiates the transaction.</td>
<td>Non-Perm hire Candidates</td>
</tr>
<tr>
<td>College/Unit Level Approval</td>
<td>1. Only required when a dept. level initiator hires a Perm employee.</td>
<td>Perm hire Candidates</td>
</tr>
<tr>
<td></td>
<td>2. College level 2 approval required before email notification.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>Note:</em> If a college level 2 approver initiates the Perm hire, this would be considered a pass through stage.*</td>
<td></td>
</tr>
<tr>
<td>Monitor Background Check (BGC)</td>
<td>Required with all hires except student workers and visitor no pays.</td>
<td>Candidate when BGC is submitted back to NCSU JAR Initiator when complete</td>
</tr>
<tr>
<td></td>
<td><em>Note:</em> The Empl_ID is generated after the BGC has been approved (new hires only)</td>
<td></td>
</tr>
<tr>
<td>Confirm Job Request</td>
<td>Only required when BGC endorsement has conditional, risk-based duties.</td>
<td>JAR Initiator</td>
</tr>
<tr>
<td>Review Job Request</td>
<td>Initiator review</td>
<td>JAR Initiator</td>
</tr>
<tr>
<td>College/Central HR Level Approval</td>
<td>Final Approval before transitioning to job data.</td>
<td>College Approver</td>
</tr>
<tr>
<td>Populate Education Data</td>
<td>Updated by Central HR when education is confirmed.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Monitoring the Background Check (BGC)

As illustrated in the previous table, the Background Check (BGC) has been incorporated into the JAR progression. This means the hiring dept. will no long have to process:

- The Personal Information Form (PIF)
- Person of Interest (POI) request for brand new employment
- The paper Background Check (BGC) Form

When a transaction has been submitted for approval, it will automatically generate an email notification to the candidate. The email notifications will contain the necessary information to log into the MYPACK Portal and complete the personal data required for the BGC. The candidate must do the following:

- Complete the form
- Electronically sign the form
- Submit the form back to NC State University to begin BGC program

Once the BGC has been approved/endorsed, it will advance to the next stage of approval. The Employee ID will be generated for brand new employees, including employment classes that do not require a BGC.

Campus divisions will probably make adjustments to their own internal hiring process with the implementation of JAR. Each division must account for the time it takes to imitate and complete a transaction before it transitions over to job data.

Central HR recommends a **minimum of two weeks** from the time a transaction is initiated to the time it reaches the last stage in the approval process. The following items reflect some variables associated with the completion of a transaction:

- The candidate will not receive the hiring email notification to complete the electronic BGC form until the JAR (hire) transaction is initiated and submitted.
- Once the candidate receives the email notifications, they will have up to 14 days to complete the electronic form and send it back to NC State University.
  - **Communication is essential between the hiring dept. and the candidate to help expedite a hire transaction.**
  - **Typically, background checks can be endorsed within 3-5 days but it could take longer depending on the information provided by the candidate and the various locations they may have lived.**
- A candidate selected for employment should not start working until the transaction has been approved at all levels.
- All required paperwork must be attached to the transaction before Central HR will approve any Perm hires.
## Job Action Request (JAR) – SAR Roles

<table>
<thead>
<tr>
<th>SEP/VPAF Role</th>
<th>New JAR Role</th>
<th>JAR Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCH HR CAMPUS VPAF</td>
<td>JAR-Modify &amp; Separate Non-Perm Transactions</td>
<td>This role will allow users to initiate JAR Modifications &amp; Separations on “Active” temps, students and no pay employees.</td>
</tr>
<tr>
<td>NCH HR CAMPUS SEP Initiator</td>
<td>JAR-Initiator for Perm &amp; Non-Perm Transactions</td>
<td>This role will allow users to initiate JAR transactions on both Perm and Non-Perm hire/rehire transactions.</td>
</tr>
<tr>
<td>NCH HR CAMPUS VPAF Approver 1</td>
<td>JAR-Approver 1 * Non-Perm transactions</td>
<td>This role will allow users to approve JAR Non-Perm transactions for temps, students and no pay employees at the college level.</td>
</tr>
<tr>
<td>NCH HR CAMPUS Base User</td>
<td>JAR-Approver 2 ** College/Central HR Level</td>
<td>This role will allow users the ability to review “Perm-Hire” JAR transactions initiated by JAR Initiators before a Background Check is sent to the candidate.</td>
</tr>
</tbody>
</table>

Divisional HR personnel currently set up in PeopleSoft (PS) 9.1 with the “SEP/VPAF” roles (left column) will automatically transition to the equivalent JAR Role in the middle column.

College divisions will have to determine which new “JAR Roles” their HR personnel will require and submit a Security Access Request (SAR) to make updates for each individual.

If a new college level HR administrator is hired after we go live with PS 9.2, each individual JAR Role will have to be assigned to the individual in SAR.

*Note: If a user is set up in PS 9.2 with the “JAR-Approver 1” role, they will also be able to Initiate JAR transactions.

**Note: If a user is set up in PS 9.2 with the “JAR-Approver 2” role, they will also be able to Initiate JAR transactions.

FYI: If a user is set up with “JAR Approver (1 or 2)” role, they will not be able to approve any transaction they initiated.
The HR DASHBOARD Panel

The “HR DASHBOARD” contains information and quick access to the most common management areas in the HR System. The following reflects a snapshot of the HR DASHBOARD panel:

The HR Dashboard data is dependent on the user’s security level access, and the panel can be organized by the individual user. The following provides a brief description of the panels or monitors starting from the top left corner, then moving down and across:

- **HR Quicklinks** – quick navigation to the most common transactions panels
- **Pay Lockout Monitor** – “YES” indicates payroll lockout for the current pay period
- **Separation Monitor** – reflects the latest separations within a 4 week timeframe of the current date
- **Perm Worklist** – reflects a dynamic list of transactions for Faculty, Non-Faculty, Postdocs & Staff
- **Non-Perm Worklist** – reflects a dynamic list of transactions for students, temps & no pay workers
- **My Temporary Employees Time** – quick access to direct report timesheet data
- **SHRA Probation Dates** – reflects an SHRA employee is within a month of achieving career status
- **Employee Headcount** – reflects the latest headcount by employee classification within the division/dept.

Users can customize their DashBoard by clicking on the “Content” link and selecting the pagelets they would like displayed.

**Note:** The remainder of this training material will focus on the HR Quicklink options.
Accessing the HR DASHBOARD
The “HR DASHBOARD” highlighted below contains HR Quicklinks navigation to the most common transaction areas that will be managed in the HR System:

<table>
<thead>
<tr>
<th>MYPACK HOME</th>
<th>FOR FACULTY &amp; STAFF</th>
<th>MYTAB</th>
<th>HR DASHBOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorites</td>
<td>Main Menu</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HR Quicklinks**

- **Hire/Rehire Employees** – used to process hire transactions for all employee classifications
- **Modify or Separate Employee** – used to process specific transaction modifications on active employees in the HR system. The modifications that can be performed are limited and based on the employee classification. Once the drop down list opens, the user can see the modifications that can be performed.
- **Position/Distribution** – used to update position data and distribution setup information
- **Time and Compensation** – used by time administrators to access and update employee timesheet. EHRA “Additional Compensations can also be accessed from the drop down list
- **Reporting and Query Tools** – used by departmental HR personnel to access Query Manage, Report2Web and Labor Distribution
- **Other Systems** – used by key departmental HR personnel to access Web Leave and PeopleAdmin
- **Help and User Guides** – being developed…
HR Dashboard Hire Options

Hire/Rehire Employees

Hire/Rehire Employees options

- **Faculty, Non-Faculty & Staff** – used when processing faculty, post docs, non-faculty & staff hires
- **Students Worker and Temporary Assignments** – used when processing biweekly temp & student worker hires
- **Unpaid Assignments** – used when processing no pay or unpaid assignments
- **Rapid Rehire (All empl_classes)** – used if the individual has been employed within the past 6 months at NC State University. The individual being rehired must be returning to the same dept., job code and compensation rate. This option is typically used with temp employees returning after a 32 day break in service or with adjunct lecturers returning to teach a course within the same academic year. If the system does not locate the employee ID using the rapid rehire link, then use the hiring option that best describes the employee class.
**HR Dashboard Modify Options**

Modify or Separate Employees:

- **Modify Students Workers and Temporary Assignments** – used when processing transactions on current active temp & student workers.
- **Modify Unpaid Assignments** – used when processing transactions on current active no pay and/or unpaid personnel.
- **Modify Personnel Information** – used to update employee personal data but limited to (base user) HR personnel who have the appropriate security level access to make modifications.
- **Modify Work Location** – used to update the employee’s work location.
- **Separate Student Workers, Temporary and Unpaid Assignments** – used to process separation actions for active students, temps & unpaid employees.
- **Transfer Faculty, Non-Faculty & Staff Appointments** – used to process a transfer action involving a faculty, non-faculty or staff member. The *receiving dept.* is responsible for initiating the transaction.
- **Promotion Faculty, Non-Faculty & Staff Appointments** – used when processing a promotion action involving a faculty, non-faculty or staff member. The *receiving dept.* is responsible for initiating the transaction.
- **Create Job Data Transaction** – used to access the job data panel (base users only).
HR Dashboard Position Options

Position/Distribution options:

- **Enter the description, work location and other information about a position** – used to access and update position data
- **Distribution Setup** – used to access and update distribution data on a specific position number and/or the employee ID
- **Create Redistribution for Temps and Supplemental Pay** – used to create redistribution for temporary employees and employees receiving supplemental pay
- **View and Update Redistributions** – used to view and update any redistributions
**HR Dashboard Time & Compensation Options**

Time and Compensation:

<table>
<thead>
<tr>
<th>HR Quicklinks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire/Rehire Employees</td>
</tr>
<tr>
<td>Modify or Separate Employee</td>
</tr>
<tr>
<td>Position / Distribution</td>
</tr>
</tbody>
</table>

**Time and Compensation**

- **Enter and Edit Timesheets** – used to access, review and/or update employee timesheets
- **Display/Print Timesheet (Timekeeper)** – allows the timekeeper to print out employee timesheets
- **Approve Reported Time** – used to access employee timesheets that require approval before they can be processed for payment
- **EHRA Additional Compensation Request** – used to open up the additional comp panel and initiate EHRA additional payments that require approval
HR Dashboard Reporting & Query Tools

Reporting and Query Tools:

<table>
<thead>
<tr>
<th>HR Quicklinks</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Hire/Rehire Employees</td>
</tr>
<tr>
<td>Modify or Separate Employee</td>
</tr>
<tr>
<td>Position / Distribution</td>
</tr>
<tr>
<td>Time and Compensation</td>
</tr>
<tr>
<td><img src="image" alt="Reporting and Query Tools" /></td>
</tr>
<tr>
<td>Query Manager</td>
</tr>
<tr>
<td>Query Viewer</td>
</tr>
<tr>
<td>Report2Web</td>
</tr>
<tr>
<td>Position Control</td>
</tr>
<tr>
<td>Labor Distribution</td>
</tr>
</tbody>
</table>

Other Systems

Help and User Guides

Reporting and Query Tools

- **Query Manager** – allows the user to create, edit and run queries
- **Query Viewer** – allows the user to create, edit and run queries
- **Report2Web** – used to access Report2Web (comp-control reports)
- **Position Control** – used to access the position control reports to retrieve Financial System salary budget data and HR Position budget data (base users only)
- **Labor Distribution** – used to access labor distribution reporting data
**HR Dashboard Other System Options**

Other Systems:

<table>
<thead>
<tr>
<th>HR Quicklinks</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Hire/Rehire Employees</td>
</tr>
<tr>
<td>✍ Modify or Separate Employee</td>
</tr>
<tr>
<td>⭐ Position / Distribution</td>
</tr>
<tr>
<td>⏰ Time and Compensation</td>
</tr>
<tr>
<td>📈 Reporting and Query Tools</td>
</tr>
<tr>
<td>➡ Other Systems</td>
</tr>
<tr>
<td>📋 Web Leave</td>
</tr>
<tr>
<td>📋 PeopleAdmin</td>
</tr>
<tr>
<td>📚 Help and User Guides</td>
</tr>
</tbody>
</table>

**Reporting and Query Tools**

- **Web Leave** – used to access and manage the web leave request
- **PeopleAdmin** – used to access the PeopleAdmin system with a valid user ID & password
Hire/Rehire Functionality
The following example reflects the initial page that appears when hiring a new employee or rehiring a previous employee who has been inactive in the HR system more than 6 months.

Employee Class is a required field. The following examples reflect the employee class option available:

**Faculty, Post Docs, Non-Faculty & Staff**
- CVM House Officers
- County Operational Supp
- EHRA County Extension
- EHRA Faculty
- EHRA Non-Faculty
- EHRA SAAS Tier 1
- EHRA SAAS Tier 2
- Law Enforcement Officers
- Post Doc
- SHRA Employee

**No Pay, Temps & Student Workers**
- Access Only - No Pay
- Student Workers
- Temp - Exempt from FLSA (TME)
- Temp - Subject to FLSA
- Unpaid Faculty
- Unpaid Non-Faculty

Desired Start Date is also a required field and indicates the first day of employment with NCSU.

If the selected candidate associated with the hire transaction has applied to be a student, enrolled as a student or been previously employed in any capacity at NC State University, an employee ID already exists in the HR system and should be entered in the “Employee ID” field above. Use search match if you are not sure the person has been affiliated with NC State University.

If a pending transaction already exists, the user would get results similar to the one illustrated below. The latest transaction cannot continue until the pending transaction has been approved or cancelled.

If no pending transactions exist, the user would click the “Next” button to access the “Initiate Job Request” page.

The following examples reflect the JAR hiring page with different employment classes.
NOTES:
The HR system is able to detect if a student worker meets the minimum criteria to be classified as a student.

If the HR system rejects the student worker employee classification, cancel the current transaction and start a new one with the correct Empl_Class.

“HR Hiring Proposal” is not required with student hires.

A Background Check (BGC) is not required for student hires unless the dept selects any option related to job duties listed under BGC.

If a BGC is required, verify the “Candidate Email” is correct in order for the electronic form to be sent to the student.

Time tracking is required for hourly employees and captured by identifying the unique Time Keeping Location (TKL).

Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
TME (Temp-Exempt from FLSA) Job Request Page

NOTES:

TME indicates a temporary employee performing exempt work from FLSA.

Temporary employees Exempt from FLSA are normally certified in a unique field of work and typically have supporting credentials.

The “HR Hiring Proposal” should reflect the approved “HP” number from PeopleAdmin.

Once the HR Hiring Proposal number is entered, the system will attach the hiring application documents supporting the transaction.

Time tracking is not required and a portion of the person’s annualized salary is paid each biweekly pay period.

“Standard Hours” should reflect the number of hours worked each pay week.

A Background Check (BGC) is required. Select the BGC items associated with the job and provide the “Candidate Email” in order for the electronic form to be sent to the candidate.

Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
TMS (Temp-Subject to FLSA) Job Request Page

NOTES:

TMS indicates a temporary employee performing hourly work subject to FLSA.

The “HR Hiring Proposal” should reflect the approved “HP” number from PeopleAdmin.

Once the HR Hiring Proposal number is entered, the system will attach the hiring application documents supporting the transaction.

Time tracking is required for hourly employees and captured by identifying the unique Time Keeping Location (TKL).

“Standard Hours” should reflect the number of hours worked each pay week.

The TMS employee is responsible for clocking In/Out of the KABA system.

Time is processed biweekly for the hours worked each pay week. Hours exceeding 40 per wk are paid as overtime.

A Background Check (BGC) is required. Select the BGC items associated with the job and provide the “Candidate Email” in order for the electronic form to be sent to the candidate.

Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
NOTES:
Visitor or Non-Faculty personnel whose primary assignment requires a courtesy/visitor access account to specific NC State University facilities and services.

Examples: loaned execs, visitor or consultants who must be known to HR System for IT access, parking, etc...

These type of appointments should be reviewed annually and terminated when the access is no longer required.

Typically a Background Check (BGC) is not required for no pay hires.

Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
NOTES:
Unpaid Faculty whose primary assignments are for the purpose of conducting instruction, research, and/or public service, who while not paid by NCSU, need to appear in the system for tracking purposes.

Examples: ROTC faculty, Adjunct faculty

An offer letter should accompany this type of appointment reflecting the work being performed and the duration of time it will take to complete the assignment.

Select any BGC items associated with the work duties. The candidate must complete the BGC form regardless. Provide the “Candidate Email” in order for the electronic form to be sent to the candidate.

If a BGC should not be processed, insert a note in the comment section.

Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
NOTES:
Postdocs are "At-Will" appointments holding the title Postdoctoral: Research Scholar, Teaching Scholar or Fellowships.

The "HR Hiring Proposal" should reflect the approved "HP" number from PeopleAdmin or approved "AC" posting waiver number.

Once the HR Hiring Proposal number is entered, the system will attach the hiring application documents supporting the transaction.

Position updates should be performed prior to initiating the hire transaction.

Postdocs typically register for classes at NCSU and normally have a student ID which should be entered when selecting the employee class.

A Background Check (BGC) is required. Select the BGC items associated with the job and provide the "Candidate Email" in order for the electronic form to be sent to the candidate.

Once the initial job page is completed, click the "Submit for Approval" button at the bottom of the page to advance to the next stage of approval.
SHRA (Subject to Human Resources Act) JAR Page

NOTES:
SHRA includes campus staff Subject to FLSA and Exempt from FLSA.
It also includes Law Enforcement Officers formally called SLE and CSX county operation support staff.
The “HR Hiring Proposal” should reflect the approved “HP” number from PeopleAdmin or approved “AC” posting waiver number.
Once the HR Hiring Proposal number is entered, the system will attach the hiring application documents supporting the transaction.
FLSA status and job code are based on position data.
Any approved position data updates should be performed prior to initiating the SHRA hire transaction.
The Job and Distribution data sections on this page will populate automatically when the position number is entered and the user tabs out of the position field.
By default, the probation box will be checked for all SHRA hires/rehires.
If an SHRA employee is transferring from another North Carolina State agency, use the appropriate Action/Reason (Transfer for Regular Employment). If an employee has prior state service, it will have to be confirmed.
A Background Check (BGC) is required. Select the BGC items associated with the job and provide the “Candidate Email” in order for the electronic form to be sent to the candidate.
Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
The following EHRA employment classifications exist:

- **ES1 & ES2** – Senior Administrative Academic Officers
- **ENF** – Non-Faculty
- **EFX** – Faculty
- **ECX** – County Extensions

The “HR Hiring Proposal” should reflect the approved “HP” number from PeopleAdmin or approved “AC” posting waiver number.

Once the HR Hiring Proposal number is entered, the system will attach the hiring application documents supporting the transaction.

If the EHRA employee is assigned to a position, the Job and Distribution Data sections will be populated automatically when the position number is entered and the user tabs out of the position field.

Any position data updates should be performed prior to initiating an EHRA hire transaction.

The “Appointment Information” is used to define the contract dates and the “Anticipated Appt. Length” is essential in determining benefits eligibility.

“Rank/Tenure Data” will need to be updated if the employee holds rank within the University.

A Background Check (BGC) is required. Select the BGC items associated with the job and provide the “Candidate Email” in order for the electronic form to be sent to the candidate.

Once the initial job page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
Activity Menu & Task Progression

The “Activity Guide” will always appear when a JAR transaction is initiated or re-opened from the worklist. The example on the left illustrates the “Initiate Job Request” is being updated but has not been submitted. The example on the right illustrates the “Initiate Job Request” has been submitted and progressed to “Monitor Background Check”.

**Activity Guide Icons**

- **The blank circle** - means the task is in progress or currently being reviewed.
- **The green circle/with a check mark** - means the task has been completed.
- **The blue circle** - means the task is dependent on the previous task approval (top to bottom).

*There is also a “Task Progress” bar at the top on the Activity Guide.*
NOTES:

Transaction approval cannot be achieved for EHRA & SHRA employees unless the supporting documentation has been uploaded.

The HR Hiring Proposal documents will automatically be attached when the corresponding “HR Hiring Proposal” number has been entered.

The “Upload Document” button allows the campus HR rep. to upload supporting documents required by Central HR for transaction approval. Supporting documents can be attached at any time during the transaction progression.

If the hiring dept. uploads any incorrect supporting documents, they can be trashed and reloaded by clicking on the trash can icon.
Worklist Page

Perm Worklist

<table>
<thead>
<tr>
<th>Transaction ID:</th>
<th>[ ]</th>
<th></th>
<th>[ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID:</td>
<td>[ ]</td>
<td></td>
<td>[ ]</td>
</tr>
<tr>
<td>Employee Class:</td>
<td>[ ]</td>
<td></td>
<td>[ ]</td>
</tr>
<tr>
<td>Department:</td>
<td>[ ]</td>
<td></td>
<td>[ ]</td>
</tr>
</tbody>
</table>

Request Type:
- Hire EHRA, SHRA, or PostDoc
- Promote EHRA or SHRA
- Rehire EHRA, SHRA, or PostDoc
- Transfer EHRA or SHRA

Transaction Status:
- In Progress
- Complete
- Cancelled

Search | Clear

NOTES:

Two separate "Worklist" pages exist (Perm & Non-Perm). The worklist is essential in determining overall transaction status.

Users can simply click the "Search" button using the transaction default setting, (top ex).

OR

Users can select specific search criteria to narrow down the results (bottom ex), then click the search button.

The results will have column names that can be sorted by clicking on the header name.

Current Step: (highlighted above) reflects where the transaction is currently at in the transaction progression.

Action Status: (highlighted above) reflects if the transaction is "In Progress, Complete or Cancelled".

A transaction can be cancelled when the "Trash Can" icon is displayed (not in this ex). However, if the trash can is not available on the worklist, the transaction can no longer be cancelled without being pushed back to the initiator from College or Central HR.

To OPEN a transaction from the worklist, click on the "Transaction ID#"
NOTES:
Promotions or Transfers can occur with active SHRA and/or EHRA employees.

When a person is selected for a promotion or transfer, the (receiving) College/Unit is responsible for initiating the transaction.

A Background Check (BGC) is typically required. Select the BGC items associated with the job and verify the “Candidate Email” in order for the electronic form to be sent to the candidate.

Once the initial page is completed, click the “Submit for Approval” button at the bottom of the page to advance to the next stage of approval.
Rapid Rehire Transaction

NOTES:

Rapid Rehire only works if the employee has been separated from the University within the past 6 months and is returning to the same job, same dept./OUC and the same rate of pay.

Once the “Employee Class, Desired Start Date and Employee ID” are entered at the top, simply click the “Search” button to retrieve the results.

If the system locates the previous employee, it will reflect the latest employment status. In this example, the last job data entry was a separation. If no results are found within the past 6 months, the user will have to use the Hire/Rehire HR Quicklink.

Users could also see pending job actions (not displayed in this ex.) entered by a different dept. attempting to hire the same candidate. If the search results indicate any pending transaction, the user will have to wait until the transaction is approved or cancelled before processing the rapid rehire.

To initiate a rapid rehire, simply check the box in the “Select” column then click the “Rehire Employee” button at the bottom.

The “Initiate Job Request” page will open (below) and populate the demographic and job data information from the previous job.
Background Check – Disclosure & Release Acknowledgment

NOTE:

The background check has been incorporated into the hiring process. It is one of the key approvals in the transaction progression and must be endorsed before moving to the next stage of approval.

The individual selected for employment will have up to 14 days to complete and submit the background check forms. Temporary access will expire after 14 days.

Employees should not start working before the effective hire date in the HR system.

If an individual needs to be active in the HR system prior to the effective approval date from BGC, an exception will have to be granted by the Central HR – Assoc Vice Chancellor or Designee (AVC).
NOTE:

Prior state service will have to be verified with the previous state agency before the Benefit service date can be updated in the HR system. This does not apply for temporary work performed during their employment.

HRIM will process the prior state service form after the person has completed all stages of approval.
Modify existing JOB (Students, Temps and No Pays)

Modify Job Search Page

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>EmpId</th>
<th>Emp Rcd</th>
<th>Name</th>
<th>Emp Class</th>
<th>DepId</th>
<th>Job Code</th>
<th>Supervisor</th>
<th>Hours per week</th>
<th>Emp Status</th>
<th>Expected End Date</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>200014864</td>
<td>0</td>
<td></td>
<td>Amy Bryant</td>
<td>STW</td>
<td>110901</td>
<td></td>
<td>Jane Jones</td>
<td>10</td>
<td>Active</td>
<td>12/15/2014</td>
<td></td>
</tr>
<tr>
<td>200014864</td>
<td>1</td>
<td></td>
<td>Amy Bryant</td>
<td>TMS</td>
<td>110902</td>
<td></td>
<td>Jane Jones</td>
<td>8</td>
<td>Active</td>
<td>5/15/2014</td>
<td></td>
</tr>
<tr>
<td>00000136/5</td>
<td>2</td>
<td></td>
<td>Todd Bryant</td>
<td>TME</td>
<td>110901</td>
<td></td>
<td>Jane Jones</td>
<td>20</td>
<td>Active</td>
<td>10/15/2014</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:**

Job modifications can only be performed on “ACTIVE” employees.

“**Red Text**” will appear if the data provided in the required fields is “Incorrect”.

Once the “Correct” data is provided, the user can locate the employee, check the select box and click on the “Modify Job Information” to advance to the next page.
NOTE:
The job modification page above reflects the “Current (job) Information” displayed on the left side of the page.

The user could make modifications under the “New Information” column on the right side of the page.

Once the new information has been updated, click the “Submit for Approval” button to process the transaction.
Employee Separation (Students, Temps and No Pays)

To separate an active student and/or temporary worker first select the Employee Class, Effective Date and Employee ID. Click the “Search” button to retrieve the results.

Check the box under the “Select” column followed by clicking on the “Process Separation” button.

NOTES:
Select the appropriate separation option from the drop-down list.
Click the “Submit for Approval” button to process the transaction.

This concludes the 9.2 HR Dashboard & JAR Overview. If you have any questions regarding the JAR process, contact your HRIM Specialist.