Quick Reference Guide: Hire – Staff and Temps
(Posted through Workday Recruiting)

Keep in mind
- Prior to continuing with the Hire process, a search must be done in Workday for the name of the new hire to ensure they do not already have a record in Workday. If there is already a record, the Change Job process should be initiated instead.
- There must be an approved unfilled position with appropriate attributes available in the supervisory organization in which the employee will be hired.
- For Staff employees, the background check process (and any other employment eligibility requirements) is initiated by Shared Services as soon as a verbal or written offer is accepted in Recruiting.
- Human Resources Policy 202 Recruitment and Selection Process should be adhered to prior to initiating the hire business process in Workday.
- Benefits Eligible employees have 31 days from their hire date to elect benefits. Please keep this date in mind when initiating and completing this process.

Information Needed
- Compensation details
- Hire Details
- Costing Allocation details (funding)
- Chicago ID (from UCAT prefeed website)

Note: Chicago ID MUST be entered with the letter capitalized (i.e., 12345678M). It is recommended to use copy and paste.

Steps:
1. The Job Details step is next. Use the Calendar Icon to enter the Hire Date.
   - The Earliest Hire Date of the position being hired in to must come before the actual Hire Date entered on the job details.

2. Use the Prompt Icon to select Reason and Position. The Employee Type, Time Type, Location and Pay Rate Type will populate automatically based on the Position selected.
3. Use the Arrow Icon to expand the Additional Information section. Enter the Default Weekly Hours and Scheduled Weekly Hours. In order for Workday to generate an accurate FTE, default weekly hours should always be equal to either 40 or 37.5.

Default Weekly Hours will need to be entered prior to Scheduled Weekly Hours. If this is not done, the Scheduled Weekly Hours will be overwritten by the value entered in the Default Weekly Hours field.

4. For employee types that are fixed term (student, postdoctoral and temporary staff), an End Employment Date must be entered under Additional Information.

5. Select files or Drop files in the Attachment Section to add Worker Documents (optional):
6. Click the **Submit Icon**.

7. Next, the **Change Organization Assignments** task needs to be completed. The organizational assignments that were entered on the position will appear here. If any of the assignments need to be edited, change them accordingly. If nothing needs to change, you do not need to edit anything on this page. Once you have completed updating the **Organizations**, click the **Submit Button**.

8. Once the step of **Change Organization Assignments** has been submitted, the **Propose Compensation** step will appear. The competition that has been offered during the offer stage defaults. Navigate to either the **Salary** (if a monthly employee) or **Hourly** (if a bi-weekly employee) section of the Compensation screen to enter the rate of pay for the employee. Use the **Edit Icon** to the far right of the screen to view the entry window. For more detailed information, see the **Propose Compensation** quick reference guide.

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- **Do not** click the **Edit Icon** within the **Guidelines** section. This section is intended to display the pay range for the grade, which will automatically populate based on the job profile selected during the initial step of the hire process.

Within the entry window, click on **Additional Details** to view **Actual End Date** and **Expected End Date**. **Actual End Dates** should only be entered for fixed-term employees with a salary plan.

- If the employee will be assigned **Period Activity Pay** or a **One-Time Payment** instead of a Salary Plan, skip the **Propose Compensation** step. Enter a comment on this page.
to indicate why compensation is blank (i.e., "This employee will receive Period Activity Pay").

- **The Merit Plan should not be edited.**

- Monthly compensation does not automatically prorate based on scheduled weekly hours. Monthly compensation must be entered with the actual (prorated) rate upon **Hire**.

Once proposed compensation is entered within each entry window, click the **Save Icon**. Click the **Submit Icon** when finished. The process will route to the Budget Partner where applicable, assigned to the organization to approve.

9. The next step of the process is **Edit Other IDs**. Remember, for staff hires. The purpose of the **Edit Other IDs** step in the hire process is to indicate the Chicago ID on the new employee’s record in Workday. **The entry of the Chicago ID at this stage is required to allow the new hire to log in to Workday once they have activated their CNET ID and once the Hire process has been routed to the new hire to complete Onboarding (New Hire Tasks).** For more information, see the **Edit Other IDs** quick reference guide.

   a. Find or create a Chicago ID from the UCAT Employee Prefeed Website. [https://cnet.uchicago.edu/ucatmenu/](https://cnet.uchicago.edu/ucatmenu/).

   When looking someone up in UCAT, you may find that they have a temporary account if they had a contractual, non-employee relationship with the University prior to the current position. You can recognize a temporary account because the CNetID starts with t-9; for instance, Jane Doe might have a temporary account of t-9jdoe. Temporary accounts must not be used in the Workday system. If you have an employee who appears to have a temporary account, you should prefeed the person from scratch. Do not use the temporary account or the Chicago ID that you find associated with that account in the Workday system, as this can cause serious problems.

   b. Enter **Chicago ID** as the Other ID type and paste the **Chicago ID** into the **Identification Number** field.

   **Note:** **Chicago ID MUST be entered with the letter capitalized** (i.e. 12345678M). **It is highly recommended to use copy and paste in order to avoid typos.**
10. **Assign Costing Allocations** will appear in the process next. The Costing Allocation level must be selected at the Worker and Position level at the very least. The Add button must be selected and costing allocations (FAS Account(s) and Sub Accounts) must be added here by entering the start date of the job and by using the Plus Icon. If the FAS Account that was assigned to the position will pay the employee’s salary, no overrides need to be entered, and the percent distribution can be left at 100%. Add other FAS Accounts and percent distributions as necessary. All fixed term employees must have End Dates assigned to their Costing Allocations. Click Submit when done.

11. Next, the new hire will receive the following Onboarding (New Hire) Tasks. A notification from Workday will be sent to the email address that was entered when the Pre-Hire was created.

- Enter Personal Information
- Enter Contact Information
- Change Emergency Contacts
- Review Documents
  - Policy Acknowledgement Form
  - Department of Children & Family Services Form
  - Student Worker Confidentiality Form (Student Employees only)
- Complete Federal Withholding Elections
- Complete I-9
- Voluntary Self-Identification of Disability Acknowledgement
- Edit Government IDs (will be sent to the employee only if the Social Security number is not entered on the I-9).

Foreign National employees who do not yet have a Social Security Number will need to enter their placeholder ID (generated from UCAT prefeed) in the Edit Government IDs Social Security Number field.

New hires who indicate they are not either a U.S. Citizen nor a Permenant Resident will receive an additional task to upload the UPP 192. The UPP 192 is a paper form and it is recommended that HR Partners distrubute the UPP 192 to new hires if they have been identified as Foreign Nationals prior to the start of the onboarding process so new hires have the document to upload.
The Onboarding (New Hire Tasks) quick reference guide is available to distribute to new hires. This guide is designed to assist new hires navigate through the onboarding process.

12. Once the Onboarding steps are complete, the HR Partner will be sent a step to Review the I-9 form. The HR Partner will need to complete section 2 of the I-9.

- If the I-9 form is Overdue, Workday will open a field to enter an Overdue Reason.
- You will be required to attach the supporting documentation within the I-9 review step in the Attachments section at the bottom of the screen. Once the documentation has been uploaded you will be allowed to move forward in the Hire process.

13. Next, the E-Verify status will need to be entered, and the case number entered if an E-Verify hire. For non E-verify hires, select Employment Authorized as the Employment Verification Status. A comment will be required. For non E-Verify cases, “N/A” is a permissible comment.

14. Once the E-Verify page has been submitted as Employment Authorized, the process will route to HR Operations (or Work Study Administrator for Work Study positions) to Assign Pay Group. The initiator will be notified when the pay group is assigned to the employee’s job. Any compensation entered thus far for the employee will be sent to payroll for processing on the next applicable pay period.

15. After the pay group is assigned, the HR Partner will be sent the task of Add Period Activity Pay. If no period activity pay will be administered, skip the task. To Skip this task after launching it, click on the Settings Icon and click Skip This Task.

- Reminder: Even if Period Activity Pay will not be administered, it is important to take action on this task as soon as possible so that the process can progress to the next step which allows the employee to add payment elections, upload their State W-4 and, if being hired in to a benefits eligible position, enroll in their benefits selections. Workday will send a notification to the employee’s email address to alert them that there are important items awaiting their attention in Workday.

- Reminder: Employees must elect their benefits within 31 days of their hire date.