UBC
eRecruit

Manage Hires
(Payroll)
The **Prepare for Hire** process is performed within eRecruit by departmental recruiters. It is the last step of the recruitment process and involves preparing the applicant’s hire information for transfer to HRMS. Once the Prepare for Hire process is submitted by the departmental recruiter, it is transferred to a holding area within Workforce Administration, where the data is vetted by Payroll and then transferred to the proper HRMS data records.

To assist you with the **Manage Hires** process in HRMS, it’s helpful to know what the departments complete in the Prepare for Hire process which is then transmitted to you.

*Excerpt from ‘UBC eRecruit Manage Openings and Applicants’ training manual—*

Complete required fields in **Preliminary Data** page.

- Verify that all non-updateable fields are correct.
- **Start Date:** override value if it has changed.
- **Type of Hire:** Click on the *Need help completing this?* link to assist you in selecting the correct value.
- **Employee ID:** This field will display for External applicants only. Click on *Assign/Verify Employee ID.*
Prepare Applicant for Hire

Former employees who have applied through the external Careers site (and not Faculty/Staff Self Service), will not be connected to their former Employee ID throughout all previous recruiting steps. Prior to hiring any applicant through eRecruit, we need to ensure that all data being transferred is associated with an Employee ID if one previously existed for the applicant. Using the existing ‘Early Assignment of HRMS Employee ID’ functionality will do this for you.

**Early Assignment of HRMS Employee ID**

Please provide the SIN number of your new hire. This will be used to search the HRMS database to determine if this person has previously been hired at UBC. If so, you must use the same employee ID number on your Appointment Form and in any communication with your new hire.

If you don’t know the SIN number but know the person’s birthdate, leave the SIN blank and press the Search button to search by birth date.

**Social Insurance Number:** If the applicant’s SIN was entered in the ‘Pre-Hire Documents’ page at the offer stage, the SIN will automatically populate for you. If not, enter the SIN manually and click on ‘Search’. Note: in order to proceed with the ‘Prepare for Hire’, you must provide a SIN number for your applicant.

- If the SIN entered does not exist in the system, this page will display.
- **Birthdate:** If the applicant’s birthdate was entered in the ‘Pre-Hire Documents’ page at the offer stage, the birthdate will automatically populate for you. If not, enter the birthdate manually and click on ‘Search’.

Note: If the SIN entered does exist in the system, you will be prompted to reactivate the EmployeeID associated with the SIN supplied.
- Click on **Add New Employee ID** to add new Employee ID if no name matches applicant's name in the search results.

Assign an employee ID to your new hire by filling in the boxes below and clicking on the 'Save' button. Your new employee ID will appear on the next screen. If you are unable to find an exact job title match, select the closest match. The correct job title will be assigned upon data entry of the appointment form.

- All fields should auto-populate for you from data already supplied in previous recruiting steps. Complete any missing fields.
- Click on **Save** button.

Confirmation of new Employee ID. Click on **Return to Prepare for Hire**
Complete required fields in Employee Personal Information page.

If all data has been previously supplied either by the applicant or in the 'Pre-Hire Documents' upload page, then the only two required fields left on this page should be ‘Birth Country’ and ‘Gender’. Otherwise complete all other required fields. Note that foreign worker hires must have a temporary SIN# (ie, 900-series SIN#) and work permits uploaded in order to submit the 'Prepare for Hire'.
Prepare Applicant for Hire

Complete required fields in **Appointment Information** page.

**Termination Date:** Enter a term end date if there is one but not previously provided. Note that this date must reflect the last date to be worked.
**Prepare Applicant for Hire**

**Action Reason:** Select from the list of values. Note that some Actions will not have Action Reasons associated with them or Action Reason = Action.

**Full/Part Time:** Click on ‘Override’ button if value needs to be changed.

**FTE:** Click on ‘Override’ button if value needs to be changed.

**Employee Class (Staff jobs only):** Click on ‘Override’ button if value needs to be changed.

**Faculty Association Code (Faculty jobs only):** Select from the list of valid values. Most common values are: ‘REG’ - Full-Time tenure/tenure track faculty; ‘PRN’ or ‘PTF’ - Part-Time tenure/tenure track faculty.

**Principal Subject Taught (Faculty jobs only):** Select from the list of valid values

**Previous Years in Rank (Faculty jobs only):** Enter number of years in rank at a previous institution, if any; download ‘Previous Years in Rank’ form and forward to Faculty Relations.

**UBC Chair/Start & End Dates (Faculty jobs only):** Enter any chair information currently held along with start and end dates.

**Other Employment Details:** Check off any values as applicable.

Note that **Account and Compensation** section cannot be altered in the ‘Prepare for Hire’ step. If incorrect, you must submit another offer with the correct funding information and re-obtain approval.

**Print Appointment Details:** Click on this link to produce an ‘Appointment Information Submission’ report (still in development as of March 1/09) if a paper confirmation is required for your records.

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### UBC RECRUITING SYSTEM – HIRE APPLICANT

#### APPOINTMENT INFORMATION SUBMISSION

<table>
<thead>
<tr>
<th>NAME:</th>
<th>Steven Brown</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPLOYEE ID:</td>
<td></td>
</tr>
</tbody>
</table>

#### DETAILS OF EMPLOYMENT

| START DATE | 2008-07-01 |
| Termination Date |  |
| Act. Code | HR |
| Act. Reason | NEW |
| Campus | UBC01 |
| Department | Full-Time |
| Work Location | General Services Action Bld |
| Employment Group | Faculty - BCG Apprentices |
| Job Family | Regular |

#### FACULTY SPECIFIC APPOINTMENT DETAILS

| Term Type | TEN |
| Appointment Type | RO |
| Faculty Assoc. Code | REG |
| Prev. Years in Rank | 8 |
| UBC Chair Start Date |  |
| Chair End Date | 2003-12-31 |

#### OTHER EMPLOYMENT DETAILS

- Acting
- Retirement Option
- Paid Ret. Appl.
- Meal (Food Service only)

#### FUNDING DETAILS

<table>
<thead>
<tr>
<th>Fund Dept/ID/PG-Desc</th>
<th>00000 323400</th>
</tr>
</thead>
</table>

Submitted By: KINVA Submission Date: 2004-03-27
Your 'Prepare for Hire' has now been successfully submitted to Payroll. Payroll will review the information submitted, contact you if there are any problems, and transfer the data to HRMS. You will receive a confirmation email from the system confirming that the data has been transferred to HRMS.

Please review the HRMS data after you receive the notification email to ensure all data was transferred correctly.

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**Prepare For Hire**

**Steven Browne**

**Applicant ID:** 3660  
**Employee ID:** 1775464

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**Preliminary Data**

- **Application Status:** Prepare for Hire
- **Status Last Updated:** 2009/02/26
- **Job Opening:** 5153  
  **Associate Professor, Tenured**
- **Job Code:** BURG10  
  **Assoc Professor (tenure)**
- **Business Unit:** UBC01  
  **UBC - Vancouver**
- **Department:** WXYZ  
  **eRecruiting Training Dept.**
- **Start Date:** 2009/07/01
- **Date Applied:** 2009/02/26
- **Type of Hire:** Hire  
  **Need help completing this?**
- **Employee ID:** 1775464  
  **Assign/Verify Employee ID**

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**Hire Comments**

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**Save & Submit**  
**Save for Later**  
**Next**

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[Return to Previous Page]
Manage Hires

Applicants ready to be transferred to HRMS are listed. The applicant’s start date and employment type (Hourly vs. Salaried) are included in the list to assist you in prioritizing your workload in relation to upcoming payrolls.

Find employees in the Portfolio you manage and click on the applicant name (note all UBCO applicants appear in Portfolio ‘OK’ and UBCV Faculty appear in the ‘N/A’ Portfolio).
Manage Hires Component:

Manage Hire - Preliminary Data

John Doe

The Start Date entered on this page will be used as the Effective Date for Job.

**Type of Hire:** This field will be populated in the ‘Action’ field in the Job Information page. Ensure the department has selected the correct action. Click on the **View Job Summary** link to see if the employee is already in HRMS and what their current employment status is. If the employee is new to UBC, no matching records will be found in the Job Summary page.

**Employee Record – Selecting Employment Record Number:** If the employee is new to UBC, the ‘Create New Employee Record’ field will default to ‘0’ and ‘Use Existing Employee Record’ will be unavailable. Keep the Employee Record at ‘0’ in all cases for brand new employees. For internal employees, determine which employment record is most appropriate to add the transaction to by reviewing the job summary page.

**Hire Comments:** Special instructions from the departmental recruiter may be noted here and will be transferred to the Job Data ‘Notes’.

Click on **Next** button or tab header to continue.
Verify that all required personal data has been completed. Complete missing fields as required. Click on the Transfer Personal Data button. The Manage Hires functionality will now transfer you to HRMS – Personal Data Component:
Manage Hires

HRMS – Personal Data Component:

Verify that all personal data transferred correctly and completely. Click on button to save data transferred. Click on Return to Manage Hires link to proceed to next step.
If the employee is a foreign hire, Citizenship information may have been provided by the department in the 'Citizenship' tab. If no data exists, proceed to the next tab.

Manage Hires

Verify that all required fields have been completed. Complete missing fields as required. Click on Transfer Citizenship Data button. The Manage Hires functionality will now transfer you to HRMS – Citizenship/Passport Page:
The system will prompt you to enter a Passport Number even though it is not a required field. This is a logged bug and will be fixed shortly after go-live. For now enter a dummy value of 12345678.

Verify that all Citizenship/Passport data transferred correctly and completely, including the attachment.

Click on Save button to save data transferred. Click on Return to Manage Hires link to proceed to next step.
If the employee is a foreign hire, Work Permit/Visa information must be provided. If no data exists, proceed to the next tab.

Verify that all required fields have been completed. Complete missing fields as required. Ensure immigration documents are attached and viewable. Review the attachment to ensure it contains the correct document. Click on Transfer Work Permit/Visa Data button. The Manage Hires functionality will now transfer you to HRMS – Visa/Permit Data Page:
HRMS – Visa/Permit Data Page:

Verify that all Visa/Permit data transferred correctly and completely, including the attachment. Click on the "Save" button to save data transferred. Click on the "Return to Manage Hires" link to proceed to next step.
Go to the final tab in Manage Hires, **Job Data**:

Verify that all required personal data has been completed. Complete missing fields as required. Click on **Transfer Job Data** button. The Manage Hires functionality will now transfer you to HRMS – Job Data Component.
Manage Hires

HRMS Job Data Component:

No data entry required on these pages.

Ensure data transferred over correctly (in particular the Job Opening ID). If may be necessary to delete existing rows or add additional rows to successfully transfer all job data. Some data rows may need to be altered or added via the regular Job Data screens (ie, Workforce Administration>Job Information>Job Data) before you’ll be able to save the data transferring from eRecruit.
Manage Hires

No data entry required on this page. Ensure data transferred over correctly.

Enter 003 if hourly or 001/002 if salaried employee.
Manage Hires

No data entry required on this page. Ensure data transferred over correctly.

Take note the compensation rate (it may disappear). Click on the Default Pay Components button to populate the Rate Code, Seq, Comp Rate, Currency, Frequency and Percent fields. Click on the Calculate Compensation button.

Pay careful attention on this page that the original comprate does not get overridden.
Manage Hires

Faculty Appointments Only--

No data entry required on these pages (Employment data page should include the Principal Subject taught value if provided by department). Ensure data transferred over correctly.
If the appointment has a term date and the employee is brand new, the system will not warn you that it will be inserting another row for the termination. Note that termination rows for existing employees will be inserted along with the first transaction. Both rows will need fields completed.
Termination row inserted after warning:

### Work Location

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Status</td>
<td>Inactive</td>
</tr>
<tr>
<td>Payroll Status</td>
<td>Terminated</td>
</tr>
<tr>
<td>Effective Date</td>
<td>2010/03/30</td>
</tr>
<tr>
<td>Action / Reason</td>
<td>Termination</td>
</tr>
<tr>
<td>Last Start Date</td>
<td>2009/03/31</td>
</tr>
<tr>
<td>Position Number</td>
<td></td>
</tr>
<tr>
<td>*Regulatory Region</td>
<td>Canada</td>
</tr>
<tr>
<td>Company</td>
<td>University of British Columbia</td>
</tr>
<tr>
<td>*Business Unit</td>
<td>UBC01</td>
</tr>
<tr>
<td>*Department</td>
<td>ZOOL</td>
</tr>
<tr>
<td>*Location</td>
<td>LSC</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>5046</td>
</tr>
<tr>
<td>Job Opening ID</td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td>2009/03/05</td>
</tr>
</tbody>
</table>

Termination row inserted. Ensure all data fields transferred over correctly.

### Faculty Specific Data Transfer – Administrative Posts

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenure / Home Dept</td>
<td>ZOOL</td>
</tr>
<tr>
<td>Academic Rank</td>
<td>Zoology</td>
</tr>
<tr>
<td>Administrative Posts</td>
<td></td>
</tr>
<tr>
<td>*Administrative Post</td>
<td>CHAIR</td>
</tr>
<tr>
<td>Post Type</td>
<td>Chair</td>
</tr>
<tr>
<td>*Appointment Type</td>
<td>Initial Appointment</td>
</tr>
<tr>
<td>From Date</td>
<td>2009/01/01</td>
</tr>
<tr>
<td>To Date</td>
<td>2009/12/31</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Revision Date</td>
<td></td>
</tr>
<tr>
<td>SetID</td>
<td>UBC01</td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
</tbody>
</table>

No data entry required on these pages. Transfer of data is automatic. Ensure data transferred over correctly.
Once all data has been transferred, the employee will be removed from the Manage Hires list. If data has only been partially transferred (ie, Personal Data transferred but not Job Data), then this employee will remain on the list.

The departmental recruiter will receive an email notification that their applicant has been successfully transferred to HRMS.