New Hire Procedures for Regular Employees

Step 1 – Departmental Instructions

Proper recruitment hiring processes and procedures must be followed before paperwork can be processed. Refer to the recruitment process on your local HR website or contact your HR office for more information.

- Submit the following new hire paperwork documents to your campus HR office: Job Form, I-9, W-4, Ethics Disclosure Form, Personal Demographic Form, Previous Injury/Illness form, Applicant Form/Resume (transcripts for faculty), Vacancy Announcement (and PD if applicable), Autodeposit Request Form (if applicable), benefits paperwork, appointment letter, and the Disclosure by University of Alaska Employee Relating to Employment of Immediate Family Members form (nepotism form). These forms can be located at http://www.alaska.edu/hr/forms/index.xml.

Follow the instructions below to complete the job form before the employee begins employment. **If the person is a non-resident alien (NRA), refer to the NRA procedures. If the employee has previous job records, refer to the Reactivation Hire procedures.**

Job Form Completion- Refer to the Job Form Instructions

Action Type

- ☐ New Hire
- ☐ Start Job

Employee Form (PEAEMPL):

- ☐ Status
- ☐ ECLS
- ☐ LCAT
- ☐ BCAT
- ☐ FT/PT Indicator
- ☐ Home Dept.
- ☐ Check Dist.
- ☐ Dist./Div
- ☐ Current Hire
- ☐ Original Hire
- ☐ Adjusted Service Date
- ☐ Seniority Date

Base Job Information (NBAJOBS):

- ☐ T/S ORG- Timesheet Org.
- ☐ Posn – Position
- ☐ Suffix
- ☐ Job Begin Date
- ☐ Job End Date (only required for term or temp positions)
- ☐ P/S/O
- ☐ Step Increase MM/DD (for regular staff employees only)

Job Detail information (NBAJOBS):

- ☐ Effective Date
- ☐ Personnel Date (same as Effective Date)
- ☐ Status
- ☐ PCLS
- ☐ Job Title
- ☐ FTE
- ☐ Employee Class (ECLS)
- ☐ Job Change Reason (if appropriate)
- ☐ Salary Table
- ☐ Grade
- ☐ Step
- ☐ Rate
- ☐ Hours/Day
- ☐ Hours/Pay or Units
- ☐ Assigned Salary
- ☐ Factor (26 for 12-month staff only)
- ☐ Annual Salary

Earnings Code Information (NBAJOBS): *For those departments using mass-time entry, leave blank.*

- Effective Date
- Earnings Code
- Hrs/Units

Labor Distribution Information (NBAJOBS):

- Effective Date
- Fund
- Orgn – Organization Code
- Acct – Account Code.
- Percent (combined percentages must equal 100%; use separate lines for additional account codes)

Signature Information

- Completed by: _________________
- Ext. # ________
- Budget:
  (If restricted funds are issued, job form must be submitted to Budget/Grants first).
- Department Approval:
- Additional pertinent information (notations)
  ____
  (Refer to Job Form Procedures)

Step 2 – Human Resource Detailed Data Entry Instructions

You may use two methods to perform data entry for newly hired employees: Quickflow or manual entry.

Quickflow allows data entry through all of the pertinent Banner forms, including the identification information, job set-up, and deduction set-up. *To initiate Quickflow, type HIRE into the direct access line.*

You may also manually enter the employee data in every form. This method may be faster, but may not be as accurate since forms can be missed. The six main Banner forms that must be completed are: PPAIDEN, PEAEMPL, NBAJOBS, PDABDSU, PDABENE, and PDABCOV. The optional forms that may be used are the PDADEDN (Employee Benefit/Deduction Form) and GOAINTL (International Information Form) for additional data entry.

I. PPAIDEN (Identification Form)

PPAIDEN is the identification form that must be completed for all employees. This information can be found on the employee's personal demographic form. Before entering any data on this form, you must complete a PERSON NAME / ID SEARCH on the SOAIDEN form. This search is mandatory because the PERSON may already exist in BANNER FINANCE and/or BANNER STUDENT and/or BANNER HR.

SOAIDEN - Name / ID Search

A thorough name search must be conducted prior to data entry to prevent multiple person identifications. The search should include ID, Social Security numbers and a name search. Please refer to the Name/ID Search procedures for detailed instruction on conducting this search.

Identification Form

Enter the employee's name as it appears on their social security card. Do not enter periods, commas, or dashes with their name. Do not enter prefixes or non-person information. If a suffix is identified on the social security card, enter the suffix in the Last Name field without punctuation (e.g., Tapp II, Smith Jr). Save the record before continuing and select Next Block. For further information, refer to the General Person Data Standards (future link to the General Person Data Standards).

Biographic Information
Enter the employee's date of birth, ethnicity, gender, marital status, and citizenship. Proceed to the Next Block.

Address Information
Arrow down to the MA address type record. If the employee does not have a MA address record, type 'MA' in the Type field to create a new address record for the employee. Enter the employee's address on the MA record only. Refer to the General Person Data Standards for the correct address entry format. ***Do not update or add an HR address. This will be updated on an hourly basis automatically.***

For Alaska addresses, enter the 5-digit zip code and the state/city will default. If the zip + 4 code is available, enter a dash between the zip and + 4 code. Arrow down to the phone field and enter the phone number in the HR field. Save the record.

Additional Information
Select Next Block to reach the Additional Information screen. Enter the respective code if the employee checked any of the veteran status fields. Save the record.

Emergency Contact Information
Select Next Block. Emergency contact information for the employee may be found here. This information is not entered, changed, or deleted by HR.

Initial and date the Personal Demographic Form.

II. PEAEMPL (Employee Form)
Employee related dates and general employee information are entered on the PEAEMPL form. Enter the eclass (ECLS) into the Employee Class field. Most of the other fields will default to the proper information. Note that the Employee Group field is blank; no data should be entered in this field. In the Home Department field, enter "B" in the COA (Chart of Accounts) column. Once the COA is entered, tab to the next field. Enter the D-Level code in the department field, and the department description will appear on the right. Tab to the Check Distribution field. The COA value of "B" will already appear in this field.
Tab to the field to the right. On the Check Distribution line under the Organization column, enter the Timekeeping Location designated by a 3-digit number preceded by the letter "T" (e.g., T105). In the District/Division field, enter the 2-digit code based on the location where the employee physically works.

Next, enter the applicable Service Dates located on the right portion of the screen. The Current Hire date is the date when an employee begins employment. All other dates will default based on the Current Hire date. The Original Hire date reflects when the employee first worked for the University, regardless of their position type, and never changes. The Adjusted Service date reflects when an employee was first employed in a leave eligible position. Once an employee becomes a regular staff/faculty member, or extended temporary, this date will not change unless there is a break in employment greater than 10 consecutive days.
The Seniority date reflects when an employee first became eligible for retirement. This date is used for PERS/TRS reporting and may be different than the Adjusted Service date depending on the employee's previous work history. Save the record.

Proceed to the Leave Balances form by selecting "Leave Balances Information" (PEALEAV) in the Options menu to the left. This form displays personal holiday leave (PHL), sick leave (SICK), and annual leave (VAC) dates and balances, if applicable. Verify these fields for correct dates. The SICK and VAC dates should be the same as the Adjusted Service date. The PHL date should be six months following the seniority date for all eligible employees. This date will automatically default based on the Adjusted Service date. Save the record.

Regulatory Information

Lastly, choose Regulatory Information from the Options menu in the left portion of the screen. In the Form Ind field under the I-9 Information section, select Received from the list of values. Enter the date when the I-9 form was signed by the department. Save the record.

III. GOAINTL (The form for International students and employees).

If the employee is a U.S. or Naturalized citizen, exit to the next screen. For all other employees, see the Non-Resident Alien (NRA) procedures (future link) for more information and data entry.

IV. NBAJOBS (Employee Jobs Form) is the form used for job set-ups.

General Job Information Block

Enter the position and suffix numbers for the employee. The suffix (begins with 00) and represents the number of times that a person was in the same position. Multiple suffixes will only occur when an employee's job stops and starts again. It is rare for regular employees to have multiple suffixes. Enter the query date as the employee's first day of work. This date will default into the job Begin Date, so this date should be accurate. Proceed to the Next Block.

Enter values for job set-up

A window will pop up for entry of additional job information. Unless the employee is working in a secondary or overload assignment, a primary job type must be entered. All employees must have one primary job and cannot have two primary jobs at the same time. Job information will default as established by the budget office. The rate must be entered to proceed, but does not have to be accurate since it can be changed later. Proceed to the Next Block.

In the General Job Information block, enter the step increase month and date in the Increase MM/DD fields. This field indicates when regular staff employees are eligible for their annual step increase and should be the same as the Adjusted Service date (for faculty and executive staff employees, leave this field blank). Verify that the Accrue Leave indicator is checked. Proceed to the Next Block.

Job Detail Information Block

The Effective Date defaults from the above Query Date; therefore, the Query Date must reflect the first day of work. The Personnel Date should be the same date as the Effective Date. Most lines will automatically default with the correct information from the position class (PCLS) as established by the budget office. Verify the status, title, employee class (ECLS), salary table, grade, step, rate, salary fields, and hours for correct information. If the job title is different from the system title, correct the job title. For regular (single PCN) positions, correct the title and contact your budget office to change the attributes on the budget forms.

For less than full-time employees, enter 1/10 of the hours/pay value in the Hours per Day field (8.00 hours should be entered for full-time employees). Enter a job change reason if appropriate. Check the salary grade and step for accuracy. If the employee is exceptionally placed (EXPL), enter the appropriate rate that is approved per University Policy and Regulations.

Enter the hours per week in accordance with employee status. Banner automatically calculates the assigned (bi-weekly) salary and annual salary. Factor and pays represents the number of pay periods;

the two values should be the same. All regular 12-month staff has 26 factors (or 26 pays periods per year), while regular faculty have 19.5 factors. Term employees should have the total number of factors for the duration of their assignment. One pay period equals 1 factor; therefore each workday represents .1 of a factor.

If applicable, choose Add a Change with a New Effective Date from the Options menu to enter an end date. End dates are only entered for term-funded positions or term positions. For NRA's, the end date should not go beyond the expiration date on their employment authorization documents (please refer to the NRA procedures-future link). Enter the end date into the Effective and Personnel Date fields. Tab to the status and choose Terminated. Tab to Change Reason and type or choose "TERM" for termination. Save the record and proceed to the Default Earnings Code block.

Default Earnings Code

The effective date, earnings code, and hours/units default into their respective fields and must match the Job Detail Information block. Proceed to Job Labor Distribution block. *(For those departments using mass-time entry, this field must be blank. Delete earnings code and proceed to the next block.)*

Labor Distribution

Verify that the Effective Date is the same as the job Effective Date. Enter the account information provided by the department on the job form. In most cases, the account information will default from the PCN budget information. If any account information differs from the job form, make the necessary changes to the labor distribution by deleting all lines of the default information and entering new values. Or, tab to the Program value, delete it, and then backspace to enter the Orgn and/or Fund value. The correct Program value will then default. If an error is made and the Program value does not default, re-enter the account information. Enter as many lines as are required with the corresponding percent value. Make sure the percentages total 100. Save the record.

Initial and date the Job Form.

V. PDABDSU (Employee Benefit/Deduction Setup Form)

Quickflow automatically proceeds to the PDABDSU form. If Quickflow is not used for the initial data entry, the form can still be used to set-up an employee's deductions. PDABDSU is only used for initial deduction set-ups. This form automatically identifies the required and available deductions for eclasses as defined by their benefit categories.

Verify the employee's ID and change the Default Begin Date (defaults to the current date) to reflect the employee's hire date. Proceed to the Next Block. Make sure the deduction blocks are specific to the employee's eclass and selected deductions. Note that some deductions are required and therefore are automatically checked. Some deductions are precluded, which means that after a deduction is checked, it precludes other deductions from being checked. Banner will not let you exit this form unless all of the required deductions are checked (e.g. 020, ADJ).

Necessary deductions:

020	Federal Tax Withholding
030	Fica Medicare ADJ Adjustment

And, one of the following retirement codes:

220	TRS (F9, FR, A9, AR)
230	PERS (XR, NR, CR, EX)
202-209	ORP Benefit/Deduction (F9, FR, A9, AR, EX)

And, one of the following pension benefit codes:

500	Pension Default - Fidelity
520	Pension - Fidelity
525	Pension - Valic
530	Pension - Lincoln
535	Pension - TIAA-CREF

And, one or more of the following union dues/fees deductions (if applicable):

600	ACCFT Agency Fee (A9)
610	AHECTE (CEA) Dues (CR)
611	AHECTE (CEA) Initiation Fee (CR)
613	AHECTE (CEA) Agency Fee (CR)
615	UNAC Dues (F9)
616	UNAC Agency Fee (F9)

Begin with the 020 deduction and enter information from the employee's W-4 form. Tab to the filing status, # of exemptions, and additional withholding (if applicable) fields and enter the appropriate information. If you have problems entering these fields, the information can be entered in the PDADEDN form.

Continue through all deductions in a similar fashion. Be sure to enter the correct plan code to differentiate between regular (RG) and part-time (PT) employees. An employee's eclass and contract length determine their appropriate deductions with respective forms that are submitted by employee. Most faculty are on a 9-month contract and, therefore, must have their deductions set with a 9-month rate and plan code.

Once all deductions are set-up, choose View Current Benefits/Deductions from the Options menu. Check the listing of all deductions to make sure the descriptions, option codes, and effective dates are accurate. If correct, save the record. For additions and corrections, use the PDADEDN form. If the Default Begin Date is after the employee begins employment, the deductions must be deleted and changed to reflect the correct date.

Step 3 – BHR Data Entry Checklist

There are two options for data entry: Quickflow and manual entry. To initiate Quickflow, type HIRE into the direct access line or manually enter the information into each form.

Personal Identification (PPAIDEN) – from the Personal Demographic Form

- [ ] Search for name and ID
- [ ] Enter the employee's name as it appears on the social security card (do not enter periods, commas, or dashes).

Biographic Information (PPAIDEN)

- [ ] Date of Birth
- [ ] Ethnicity
- [ ] Citizenship
- [ ] Gender
- [ ] Marital Status

Address Information (PPAIDEN)

- [ ] Address**- MA type only**
- [ ] Zip Code

- City
- State
- Phone number -**HR type only**

Additional Information (PPAIDEN)

- Veteran Information:
- Special Disabled Veteran

Initial and Date Personnel Demographic Form.

Employee Form (PEAEMPL): - From Job Form

- Employment Status
- Employment Class (ECLS)
- Employee Group (should be left blank)
- FT/PT Status
- Home Dept.
- Check Dist.
- Division/District
- Current Hire Date (remaining fields will default from current hire date)
- Original Hire Date
- Adjusted Service Date
- Seniority Date
- First Work Day

Leave Balance Information (PEALEAV): Verify leave code and dates available.

- Sick Leave (SICK)
- Annual Leave (VAC)
- Personal Holiday Leave (PHL) – For staff employees only (date should be 6 months from seniority date).

Regulatory Information (PEAEMPL)

- **I-9 Information** (RECEIVED)
- Date Received

International Information (GOAINTL): If the employee is a U.S. or Naturalized citizen, exit to the next screen. For all other employees, see the Non-Resident Alien (NRA) procedures (future link) for more information and data entry.

Base Job Information (NBAJOBS):

- Posn – Position
- Suffix
- Query Date (should be Begin Date)
- Job type (P/S/O)
- Step
- Job End Date (only required for term or temp positions)
- Accrue leave - check for regular staff (NR/XR)

Job Detail information (NBAJOBS): Some blocks will automatically default when the PCN is entered in the Base Job Information block, but verify the Job title, PCLS, and ECLS blocks to make sure information is correct. To create a new job record (such as creating job end dates), choose Add a Change with a New Effective Date.

- Effective Date
- Personnel Date
- Hours/Day
- Job Change Reason (Blank or EXPL only)
- Salary Group
- Salary Table
- Grade
- Step
- Rate
- Hours/Pay or Units
- Assigned Salary
- Factor (26 for 12- month regular staff)

- ☐ Pays (same as Factor)
- ☐ Annual Salary

Default Earnings Code Information (NBAJOBS): *(For those departments using mass-time entry, this field must be blank. Delete earnings code and proceed to the next block.)*

- ☐ Effective Date
- ☐ Hrs/Units
- ☐ Earnings Code

Labor Distribution Information (NBAJOBS): Verify only, all fields should default.

Effective Date
Fund
Orgn – Organization Code
Acct – Account Code
Prog – must correspond with orgn value
Percent (must equal 100%; use separate lines for additional account codes)

Initial and date the Job Form.

<u>Employee Benefit/Deduction Form (PDABDSU):</u>

- ☐ Federal Withholding (020)
- ☐ FICA Medicare (030)
- ☐ Union Dues/Fees – (not applicable for regular staff XR/NR) (A9 –600), (F9 - 615, 616), (CR - 610-613), (UNAD 620, 621, 622)
- ☐ Auto Deposit (if applicable) (790)
- ☐ Tax Deferred Annuity – (T01 – T27) - optional deduction
- ☐ ADJ Adjustment required for all employees