CHECKLIST: ENTERING A NEW HIRE/REHIRE

Name: ________________________________________  Empl ID: ___________________________________

☐ ENSURE POSITION DATA IS UPDATED
Role: Position Management Specialist

☐ SEARCH FOR AN EXISTING PERSON
Role: HR Personnel Roster
Search for People, Personnel Roster, Enterprise Personnel Report
Check to see if the person is already in PeopleSoft. If no, continue with the next step. If yes, skip to Enter Job Data.

☐ ENTER PERSONAL/BIOGRAPHICAL DATA (NEW HIRE ONLY)
Role: Agency HR Specialist
Navigation: Main Menu > Workforce Administration > Personal Information > Add a Person

☐ ENTER JOB DATA
Role: Agency HR Specialist
Navigation: Main Menu > Workforce Administration > Job Information > Job Data
Confirm employment service dates and benefits eligibility prior to entry.

☐ ADD A PERSON PROFILE
Role: Agency HR Specialist
Navigation: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
Enter Probation, Veteran Disability, and Severe Disability (3 mandatory). All other sections are optional.

☐ ENTER TIME AND LABOR DATA
Role: Time and Labor Specialist or Agency HR Specialist
Agency HR Specialist – Enter this during Job Data entry via Time Reporter Data link on the Employment Data page.
Time and Labor Specialist – Navigation: Main Menu > Time and Labor > Enroll Time Reporters > Create Time Reporter Data

☐ ASSIGN A SCHEDULE
Role: Time and Labor Specialist
Navigation: Main Menu > Time and Labor > Enroll Time Reporters > Assign Work Schedule
Schedules can be assigned only after overnight processes run. Enter this the day following new hire entry.
The assigned work schedule is only used for managing absences. This is not their actual daily work schedule.

☐ VERIFY/UPDATE TAX DATA
Role: Agency Payroll Specialist
Verify/Update Federal and State Tax Data – Navigation: Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data
Verify/Update Tax Distribution – Navigation: Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Tax Distribution

☐ SET UP GENERAL DEDUCTIONS
Role: Agency Payroll Specialist
Navigation: Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General

☐ ENROLL IN DIRECT DEPOSIT
Role: Agency Payroll Specialist
Navigation: Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit
Set up the Balance of Net Pay direct deposit account.
ENTER ABBR FOR LIFE, ICI AND AD&D
Role: Agency Benefits Specialist
Navigation: Main Menu > Benefits > Employee/Dependent Information > Update ABBRs

ENROLL IN BENEFITS
Role: Agency Benefits Specialist
Encourage employees to enroll via eBenefits (provide Job Aid to employees); enter paper applications as needed.