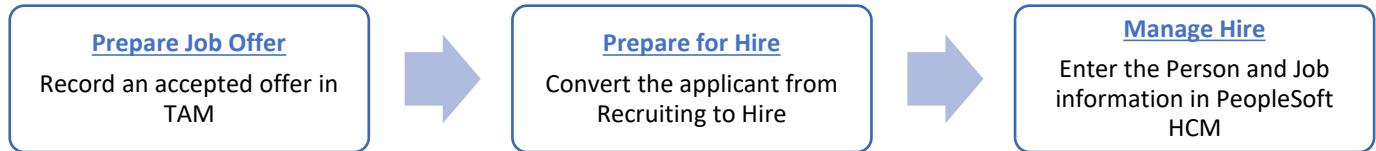


Process a Hire

This summary guide walks you through how to process a selected applicant as a hire. It covers how to prepare the job offer, prepare for hire, and manage hire. It ends at closing out the job opening. These steps are applicable to various kinds of job openings to fill permanent, project and LTE vacancies/positions.

Processing a hire consists of three main steps:



For detailed job aids for each of these steps, click on the linked titles in each of the rectangles above.

1. Prepare the job offer.

- Start this step when you have the date of offer and final accepted pay rate.
- In the job opening, go to the **Applicants Tab**.
- Click the **checkbox square** to the left of the selected applicant's name.
- On the far right of this applicant's row, click **Other Actions > Recruiting Actions > Prepare Job Offer**.
- Confirm the **position number** and **job code** appearing on the **Prepare Offer Page**.



Complete the position maintenance for the new hire's position and add the position number to the job opening asap.

When you add a position number after creating the job opening, DO NOT check the Primary Position checkbox.

- On the bottom left, click **Add Offer Component**. Enter the **Base Pay** and any **Add-on Pay** (e.g., sign-on bonus, specific add-on to base pay for CPA's or engineers) if applicable.
 - On the top right, enter the **Offer Date**.
 - If known, enter the **Start Date**.
 - Click **Submit**.
- ### 2. If the applicant accepts the job, record the accepted offer.
- In the job opening, go to the **Applicants Tab**.
 - Click the **checkbox square** to the left of the selected applicant's name.
 - On the far right of this applicant's row, click **Other Actions > Recruiting Actions > Accept Offer**.
 - The **Accept Offer** screen will appear. Select the appropriate **Written Hiring Reason** from the drop-down menu and click **Accept**.
 - A confirmation message will appear. Click **OK**.




Did the applicant decline the job?

First, select **Declined Offer** for the applicant’s ROA on the cert.

Next steps depend on how far you were in processing the hire:

- [Applicant declined job after you processed the job offer](#)
- [Applicant declined job after you completed the Prepare to Hire process \(but before completing job entry\)](#)
- [Applicant declined job after you completed the hire entry on job](#)

3. If the selected applicant is an external applicant, enter the Applicant Data.

- o In the job opening, go to the **Applicants Tab**.
- o Click on the applicant’s name.
- o Click on the tab **Applicant Data > Eligibility & Identity**.
- o Enter the applicant’s date of birth (DOB), marital status, and gender.
- o Click the USA icon  and then click **Add National Identification**.
- o Select USA for county. Enter the **SSN** in the **National ID field**. Click **OK**.
- o Click **Save on** the bottom of the page.
- o Click **Return** on the bottom or top of page to return to the Job Opening.

4. Start the **Prepare for Hire** process.



✓ Checkpoint: The selected applicant’s **Disposition** should now be **Accepted**. That means you have completed the accepted job offer steps.

If you changed the selected applicant’s **Disposition** to **Ready to Hire**, you will need to change it back to **Accepted** ([review this section](#) of the **Prepare for Hire** job aid).

- o In the job opening, go to the **Applicants Tab**.
 - o Click on the **Offer** category on the top right.
 - o On the far right of the applicant row, click **Other Actions > Recruiting Actions > Prepare for Hire**.
 - o The **Prepare for Hire** page will appear.
5. Complete the **Prepare for Hire** page. If the applicant is not attached to the job opening and you cannot use **Prepare for Hire**, lick here [review this section](#) of the job aid.
- o Confirm that the **Job Opening ID** is correct.
 - o Confirm that the **Position Number** is correct.
 - o Select the **Type of Hire** from the drop-down menu.

Type of Hire	Use For:
Hire	<ul style="list-style-type: none"> • An external applicant who has no record in PeopleSoft HCM • An external applicant where you need to add a new employment instance (e.g., was a contingent worker or POI) • An internal applicant who is moving from one company to another within PeopleSoft HCM

Type of Hire	Use For:
Rehire	<ul style="list-style-type: none"> An external applicant who has a record in PeopleSoft HCM
Add Concurrent Job	<ul style="list-style-type: none"> An internal applicant who is continuing in their current job and adding this job
Transfer	<ul style="list-style-type: none"> An internal applicant who is transferring, demoting, or promoting to a new job



✓ Checkpoint: If the Type of Hire you need is not available in the drop-down menu (e.g., Rehire) STOP!
 You will NOT be able to change the type of hire in **Manage Hires** after this step.
 Review the [Troubleshooting Tips](#) in the **Prepare for Hire** job aid for more information.



If the hire applied as an internal applicant but is no longer an active employee, [review this section](#) of the **Prepare for Hire** job aid for more information.

- Confirm or enter the **Start Date** (the effective date of the hire that will be pushed through to PeopleSoft HCM Job Data).
- Click **Verify Employee ID** to see if the hire applicant already exists in PeopleSoft HCM based on name, DOB, SSN, address, and email.
 - *If there are no matches*, the message **No matches found** will appear. Click **Ok**.
 - *If there are possible matches*, click **Carry ID** on just one of the person's rows. Click **Return**.
- After verifying the employee ID, click **Review Jobs** to determine if you need to create a new Empl Record/employment instance for the hire.



If you have questions about which Empl Record to use, please contact the DPM HRIS team BEFORE moving forward.

- The window **Job Information** will appear. It consists of the hire's existing Empl Records.
- Use this job information to determine if you need to create a new Empl Record (Hire) or not (Rehire or Transfer) and/or what kind of transaction should be used.
- Create a new Empl Record if ANY of the following appear in the hire's job information:
 1. **Business Unit** is greater than 600
 2. **Company** is outside of WIS
 3. **Employee Classification** is National Guard (NGD)
 4. **Organizational Relationship** is something other than Employee (EMP), such as CWR or POI.
 5. Regardless of **HR Status**, you should create a new Empl Record if one of the above are true.
- Use an existing Empl Record if ALL of the following appear in the hire's job information
 1. **Business Unit** is less than 600
 2. **Company** is WIS
 3. **HR Status** is active
 4. **Employee Classification** is NOT National Guard (NGD)

- 5. **Organizational Relationship** is Employee (EMP)
- 6. Make sure the employee is not staying in this existing appointment before using it. This requires communication between the business units and/or employee.



If you do not see job information for someone you know is a current or former employee or if you made an error on Empl Records, STOP and create a ticket with DPM HRIS before processing the hire.

The sooner Empl Record errors are reported, the easier it is to make corrections.

- Confirm that you still have the correct **Type of Hire**.
 - *If the hire is an external applicant who has a record in PeopleSoft HCM, the **Type of Hire** will automatically change to **Rehire** when you click **Carry ID**.*
 - *If the hire is an employee who has only a POI or Contingent Worker employment instance in PeopleSoft HCM:*
 1. The **Applicant Type** will automatically change to **Internal – Non-Employee**.
 2. Update the **Type of Hire** to **Hire** because you will need to add a new Empl Record/employment instance for the hire.
- Click the **Submit Request to HR** button at the bottom of the page. This action pushes the applicant to **Manage Hires** for hire entry in person and job.
 - You do not have to check the Send Offer Letter to HR checkbox.
- A confirmation message will appear. Click **Ok**.
- The applicant will be moved to **Hire**, and their Disposition will be updated to **Ready**.



✓ Checkpoint: The selected applicant should now appear under the **Hire** heading at the top of the **Applicants Tab** and have a Disposition of **Ready**. That means you have completed the Prepare for Hire steps.

- 6. Start the **Manage Hire** process to complete the **Person** and **Job** entry.
 - Navigate to the **Manage Hires** page. Click **Workforce Administration > Personal Information > Manage Hires**.
 - On the **Manage Hires** page, click on the selected applicant's name.



If you do not see the selected applicant's name on the **Manage Hires** page, double check the search criteria (e.g., start date range) at the top of the **Manage Hires** page.

- 7. Review the information on the **Manage Hires Detail** page.
 - Confirm the **Type of Hire** is correct. This will be the **Action** on the job.
 - Confirm the **Desired Start Date** is correct. This will be the **Effective Date** on the job row.

If the hire is...	Type of Hire	Org Instance	Employment Record	Additional Info
An external applicant with no	Hire	Create New Org	Create New Assignment	

If the hire is...	Type of Hire	Org Instance	Employment Record	Additional Info
prior record in PeopleSoft HCM				
An active employee	Transfer	Use existing Org Instance	Use Existing Assignment	<ul style="list-style-type: none"> - No need to create a PeopleStealer row - Changes to pay rate, absence eligibility, or benefits eligibility should be separate rows. Do NOT update those fields on the transaction row.
A former employee who has a record in PeopleSoft HCM	Rehire	<ul style="list-style-type: none"> - If using active Empl Record: Use existing Org Instance - Confirm the correct number 	<ul style="list-style-type: none"> - If using active Empl Record: Use Existing Assignment - Confirm the correct empl record number 	<ul style="list-style-type: none"> - Make sure the organizational relationship is "Employee" - Must go through Add person to update the job data
An employee who has only a POI or Contingent Worker Empl Record/ employment instance	Hire	Add a new employment instance	Create New Assignment	<ul style="list-style-type: none"> - Make sure the new Empl Record's organizational relationship is "Employee" - Make sure the type of hire is Hire so that you can add a new employment instance

8. Complete the Person entry.

- At the bottom of the Manage Hires Detail page, click **Add Person**.
- Click on the **Biographical Details** tab and enter or update the information.
 - *If the hire is an external applicant with no prior record in PeopleSoft HCM, there will be no Empl ID assigned yet.*
 - *If the hire is a former employee who has a prior record in PeopleSoft HCM, there may be duplicate rows of Biographical and Contact Information. You can delete the top of stack row that is a duplicate of the prior row in any of the sections.*
- Click on the **Contact Information** tab and enter or update the hire's information.
- Click on the **Regional** tab and enter or update the hire's information.
 - *If the hire is an external applicant with no prior record in PeopleSoft HCM, select at least one **Ethnic Group** as Primary.*
 - *If the hire is a former employee who has a prior record in PeopleSoft HCM, you will get an error message if more than one ethnicity is indicated as primary. This error message will start with "Duplicate key value – not allowed." You will need to delete one of the lines of duplicative data before saving.*

9. Complete the Job entry.

- Click on the **Organizational Relationships tab** > **Confirm that the Employee checkbox is checked > Add Relationship.**
- On the **Work Location tab**, enter the applicable **Action Reason.**
- *If needed*, edit the **Effective Date (Sunday for current state employees, Monday for new original/first time hires).**
- *If no position was used during the Prepare for Hire process*, enter the position number.
- Click on the **Job Information tab** and enter the **Empl Class** and **Officer Code.**
- Click on the **Job Labor tab** and enter all information.
- Click on the **Payroll tab** and confirm or update all information. *If the hire is an active employee and there is a pay rate change (e.g., pay group)*, add another job row for each of the applicable changes.
- Click on the **Employment Data tab** and confirm or update all information.
- Click **Ok** at the bottom of the page after you have completed all job entry.
- *If there is a pay rate change, absence eligibility change, or benefits eligibility change*, add separate job rows for each of the applicable changes. Do NOT update those fields on the transaction row.



✓ Checkpoint: If everything was entered correctly, you will be brought back to the **Manage Hires** page and the selected applicant will no longer be listed on this page.

10. Review the person and job entry as needed.

11. Add any additional job rows associated with the hire (e.g., pay, eligibility changes).



After you push someone to **Manage Hires** through the **Prepare for Hire** process, DO NOT manually add Person or Job information.

If you enter this info outside of **Manage Hires**, you will need to submit a ticket to have the person removed from the Manage Hires page.

12. Close out the job opening. Review the [Closing a Job Opening job aid](#) for more information.