



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.