New Hire
HR FRONT END TRAINING
HOW-TO GUIDE
Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

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Course Information

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Version: 1.0

APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon

• Do not share your passwords or store them in an unsecured manner.
• Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information

• Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
• Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
• Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
• Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.
<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
<tbody>
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<td>1</td>
<td>Search Banner and iCard</td>
</tr>
<tr>
<td>2</td>
<td>Enter Demographics Information</td>
</tr>
<tr>
<td>3</td>
<td>Employee Class and Benefits Determination</td>
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<td>4</td>
<td>NESSIE New Hire logon creation</td>
</tr>
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<td>5</td>
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Introduction

This guide will help you understand and process New Hire transactions in the HR Front End. It includes an explanation of New Hire process and gives general guidelines about when it is appropriate to use the New Hire transaction type. It also provides instructions on how to complete New Hire transactions.

Assumptions

This guide assumes that you have completed the HR Front End Overview and Navigation online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the HR Front End Overview and Navigation course is not repeated in this guide.

Before processing a New Hire transaction, ensure that prior approvals have been obtained where applicable.

What is a New Hire Transaction?

The New Hire transaction is used to create a record for someone that is completely new to the University (New Hire) or someone that has been completely separated and is returning to the University (Rehire). The New Hire Wizard walks you through the four main sections of hiring a new employee:

- Creating the employee’s NESSIE New Hire logon
- Entering the position data
- Entering the job data
- Tracking the completion of the New Hire forms

Conventions Used in this Guide

Indicates a **Note** or additional information that might be helpful to you.

Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

Indicates a **Hint** such as a tip, shortcut, or additional way to do something.
**Completing a New Hire Transaction**

You complete a New Hire transaction using a wizard that guides you through the process of creating the employee’s logon, entering the position data, and adding a job. Follow these steps to complete a New Hire transaction in the HR Front End.

**Creating a New Hire Logon**

**Searching Banner and iCard**

You begin a New Hire transaction by searching the University systems to see if the person being hired has an existing record. The Social Security Number, Last Name, and Birth Date are required to perform this search.

1. From the **Transactions** menu, select **Initiate New Hire**.

![Figure 1: HR Front End Home Page](image)

The **Search Banner & iCard** screen of the wizard appears.
2. Select Yes or No to the question Is this new hire a Student (Undergraduate or Graduate) now or have they been since 2000?

   NOTE: If you select Yes, you must enter a UIN/Banner ID in the search because an Undergraduate or Graduate student already will have an assigned UIN.

3. Enter search information (Social Security Number, Last Name and Birth-date are required).

   NOTE: If the new hire has a Third Country National (TCN) number but does not have a Social Security Number yet, enter the TCN number in the SSN field.

4. Click Search.
   Any potential matching results from Banner and/or ICard are displayed. If no potential matches are found, the message "The information you entered was not found. Click Continue to complete the new hire process using the criteria entered in your search" is displayed in the yellow message area.

5. Click Continue.
   The Demographics Information screen of the wizard appears (see Figure 5).

   NOTE: If a matching record is found for the employee, see the following section Matching Records Found. If no match is found, skip to the Entering Demographics Information section.

### Matching Records Found

If either the Social Security Number entered or the combination of the Last Name and Birthdate are found in Banner and/or ICard, a matching result is displayed in a table on the Search Banner & iCard screen.
If the Employee Status is Terminated

If a matching record is found in Banner and/or iCard, and the Employee Status is T - Terminated, you can continue the New Hire transaction as a Rehire.

![Figure 3: New Hire Search – Match with Terminated Record Found](image)

Highlight the matching record in the search results table and click Continue.

The Demographics Information screen of the wizard appears (see Figure 5).

If the Employee Status is Active

If a matching record is found in Banner and/or iCard, but the Employee Status is A – Active, the Active Employee screen appears. You must add a new job using an Add a Job or Reappointment transaction instead.

![Figure 4: Active Employee screen](image)
1. Select one of the three options presented:
   a. **Proceed to ERV** (Employee Record View).
      The *Employee Record View* for the selected employee appears. You can initiate an Add a Job or Reappointment transaction from here.
   b. **Return to the Search screen to perform a new search**
      The *Search Banner & iCard* screen appears again.
   c. **Exit the New Hire Transaction Wizard**
      The HR Front End *Home Page* appears.

2. Click **Continue**.
**Entering Demographics Information**

The next step in the New Hire Wizard is the **Demographics Information** screen. This screen contains information such as the Home Chart Org, citizenship information, and contact information for the new hire.

![Demographics Information screen](image)

**Figure 5: Demographics Information screen**

1. Complete the required fields on the Demographics Information page.  
   
   **NOTE:** Refer to **Table 1: Demographics Information Required Fields** for more information on the required fields.

2. Click **Continue**.  
   
   *The Employee Class and Benefits Determination* screen appears.
<table>
<thead>
<tr>
<th>Required Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Populated from New Hire search screen and is not editable.</td>
</tr>
<tr>
<td>First Name</td>
<td>Enter the employee’s first name. This will populate if the first name was entered in the New Hire Search screen.</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>Populated from New Hire search screen and is not editable.</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Populated from New Hire search screen and is not editable.</td>
</tr>
<tr>
<td>Gender</td>
<td>Select the employee’s gender from the drop-down menu.</td>
</tr>
<tr>
<td>Unit Contact Email</td>
<td>Enter the email address for the unit contact. The system will auto-generate an email that contains NESSIE New Hire login information for the employee to the address entered.</td>
</tr>
<tr>
<td>Citizenship</td>
<td>Select the citizenship status from the drop-down menu.</td>
</tr>
<tr>
<td>Chart of Accounts (COA)</td>
<td>Select the COA from the drop-down menu.</td>
</tr>
<tr>
<td>Organization</td>
<td>The Organization list will filter based on the COA. Select from the drop-down menu.</td>
</tr>
<tr>
<td>HR Campus</td>
<td>Will default based on the COA selected. Edit if necessary</td>
</tr>
<tr>
<td>Hire Date</td>
<td>Enter the date the hire is effective. Month / Date / Year</td>
</tr>
<tr>
<td>Login Expiration</td>
<td>The date that the NESSIE New Hire login will expire. The Logon Expiration field will automatically be populated to sixty days from the Hire date or from the transaction date, whichever is later. This date can only be edited by Central HR.</td>
</tr>
<tr>
<td>Mail Code</td>
<td>Enter the Campus Mail code for the employee</td>
</tr>
<tr>
<td>Campus Mail Location</td>
<td>Select the Campus Mail location from the drop-down menu.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Enter the employee’s work street address.</td>
</tr>
<tr>
<td>City, State, Zip Code, and County</td>
<td>These fields will default for Urbana, Chicago and Springfield Campus Mail addresses and will not be editable. The fields must be completed for Global and Off-campus ACES Extension Addresses.</td>
</tr>
</tbody>
</table>

**Table 1: Demographics Information Required Fields**
Determining the Employee Class and Benefit Category

The next step in the New Hire Wizard is the **Employee Class and Benefit Category Determination** screen. This screen determines the new hire’s employee class, benefit category, and SURS eligibility. To make these determinations, the HR Front End populates the questions on this screen based on the employee group selected and the answers to subsequent questions.

![Employee Class and Benefit Category Determination screen example](image)

**Figure 6: Employee Class and Benefit Category Determination screen example**

1. Select the appropriate **Employee Group**
2. Complete the fields displayed based on the Employee Group selected.

   **NOTE:** Refer to *Table 2: Required Information for Employee Class Determination* for more information on the questions that appear for each Employee Group.

3. Click **Continue**.

   The **State Universities Retirement System (SURS)** screen of the wizard appears.
<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Determination Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – Faculty and Other</td>
<td>• Does the Employee hold a J1, J2, F1, or F2 Visa?</td>
</tr>
<tr>
<td>Academics</td>
<td>• Annual Salary</td>
</tr>
<tr>
<td>B – Academic Professionals</td>
<td>• Total % Employed</td>
</tr>
<tr>
<td>G – Grads and Pre-Doc Fellows</td>
<td>• Length of Academic Contract</td>
</tr>
<tr>
<td>P – Post-Doc Fellows / Research</td>
<td>• Service Begin and End Dates (Contracts less than 9 months)</td>
</tr>
<tr>
<td>Assoc. / Intern</td>
<td>• Pay Basis (Contracts 9 months or greater)</td>
</tr>
<tr>
<td>R – Residents</td>
<td>• Is the new hire receiving a retirement allowance from SURS?</td>
</tr>
<tr>
<td></td>
<td>• Is the new hire currently a police officer/firefighter or will they hold a police position?</td>
</tr>
<tr>
<td>C – Civil Service Web/Dept Time</td>
<td>• Does the Employee hold a J1, J2, F1, or F2 Visa?</td>
</tr>
<tr>
<td>Entry D – Civil Service Time</td>
<td>• Annual Salary</td>
</tr>
<tr>
<td>Report Feeder</td>
<td>• Total % Employed</td>
</tr>
<tr>
<td></td>
<td>• Work Week Hours</td>
</tr>
<tr>
<td></td>
<td>• Status (Exempt or Non-Exempt)</td>
</tr>
<tr>
<td></td>
<td>• Exempt Type (if exempt)</td>
</tr>
<tr>
<td></td>
<td>• Is this person a Flex year or Seasonal employee?</td>
</tr>
<tr>
<td></td>
<td>• Non-work period begin and end dates (Flex year or seasonal employees only)</td>
</tr>
<tr>
<td></td>
<td>• Is the new hire receiving a retirement allowance from SURS?</td>
</tr>
<tr>
<td></td>
<td>• Is the new hire currently a police officer/firefighter or will they hold a police position?</td>
</tr>
<tr>
<td>E – Civil Service Extra Help</td>
<td>• Is this position seasonal?</td>
</tr>
<tr>
<td>H – Academic Hourly &amp; Grad</td>
<td>• Is the employee an Academic or a Grad Hourly?</td>
</tr>
<tr>
<td>Hourly</td>
<td></td>
</tr>
<tr>
<td>S – Student</td>
<td>• No Additional Information Required</td>
</tr>
<tr>
<td>T – Retiree / Annuitant</td>
<td></td>
</tr>
<tr>
<td>U – Unpaid</td>
<td></td>
</tr>
<tr>
<td>V – Virtual</td>
<td></td>
</tr>
</tbody>
</table>

**Table 2: Required Information for Employee Class Determination**
Determining State Universities Retirement System (SURS) Eligibility

The State Universities Retirement System (SURS) screen of the New Hire Wizard displays if the New Hire is SURS eligible, based on the answers given on the Employee Class and Benefit Category Determination screen. Your answers to these questions determine what SURS code is selected for the employee.

**Figure 7: State Universities Retirement System (SURS) screen**

1. Select the answer to the *Is the new hire receiving a retirement allowance from SURS* question.
   
   *If you select no, the second question appears. If you select yes, skip to step 3.*

2. Select the answer to the *Is the new hire currently a police officer/firefighter or will they hold a police position* question.

3. Click **Continue**.
   
   The **New Hire Review** screen of the wizard appears.
Reviewing the New Hire Logon Information

The New Hire Review screen displays a summary of all information entered to this point in the New Hire Wizard.

Figure 8: New Hire Review screen

1. Review the information. If any changes are needed, click Edit in the corresponding quadrant or use the breadcrumbs at the top of the screen to return to the section needing the change.

   The HR Front End returns you to the appropriate page in the New Hire Wizard.

2. When all information has been reviewed and is correct, click Continue.

   A message appears warning you that continuing the transaction will generate a Logon ID and apply data to Banner.

3. Click OK.

   The New Hire Logon Confirmation screen of the wizard appears.
NOTE: A system generated email with instructions on logging into NESSIE New Hire is immediately sent to the Unit Contact email address and the Employee email address provided on the Demographic Information screen once the logon is generated.
**Confirming the New Hire Logon**

Once the information on the **New Hire Logon Review** screen is confirmed and applied to Banner, the **New Hire Logon Confirmation** screen appears. This screen displays the employee’s NESSIE New Hire login information, a link to NESSIE New Hire, and the ability to print this data.

![New Hire Logon Confirmation](image)

**Figure 9: New Hire Logon Confirmation screen**

1. Click **Print Friendly View** to print a copy of the logon information.
2. Click **Continue**.

   The **Position Selection** screen of the wizard appears.
**Entering Position Information**

After you create the employee’s New Hire logon, you must assign a position to the employee.

**Selecting the Position**

The next step in the New Hire Wizard is the **Position Selection** screen. This screen offers three methods of selecting position information:

1. Directly enter a position number
2. Search for a position
3. Create a new position

*Figure 10: Position Selection screen*

**Option 1: Entering a Position Number**

If you know the position number, you can enter it directly in the **I Have a Position Number** field (see Figure 10).

1. Enter the position number in the **I Have a Position Number** field
2. Click **Continue**. The **Position Data** screen appears.
**Option 2: Searching for a Position**

If you do not have a position number, you can search for possible positions. This search will find any vacant or pooled positions that match the new hire’s employee group, as well as all available Lump Sum positions, within a specified organization. Position searches are restricted to the chart of accounts and organizations within your security permissions.

**NOTE**: The Search option is not available for Civil Service and Extra-Help employee groups.

1. Select the **COA** and **ORG** in which you want to search (see Figure 10).
2. Click **Search**.
   *The matching search results are displayed.*
3. Highlight the desired position.
4. Click **Continue**.
   *The Position Data screen appears.*

**NOTE**: You can resort the position list by clicking on the column headings in the results table.

**Option 3: Creating a New Position**

If you cannot find a position meeting your needs using the search, you also can create a new position.

**NOTE**: The Create New Position option is not available for Civil Service and Extra-Help employee groups.

1. Click **Create New Position** (see Figure 10).
   *The Position Data screen appears.*
2. Complete the necessary fields on the **Position Data** screen.

**NOTE**: For more information on Creating New Positions, see the Position Creation and Maintenance guide.
**Editing Position Data**

Once you select a position, the next step in the New Hire Wizard is the **Position Data** screen. This screen allows you to edit existing position data or create a new position. Fields that can be edited for an existing position include: Position Class, Position Title, Position Employee Class, Type, PAPE Number, Job Progression, Position Descriptors, Budget Profile, Budget COA, Budget ORG, and Position Labor Distribution.

![Position Data screen](image)

*Figure 11: Position Data screen*
1. Review the **Position Data** screen.

2. Make any necessary changes in the editable fields. If creating a new position, complete all required fields.

3. Click **Continue**.

   The **Job Data** screen appears.

   **NOTE**: For more information on Creating New Positions, see the Position Creation and Maintenance guide.

   **NOTE**: Position Data is not editable for Civil Service, Extra Help, and Student positions.
**Adding Job Information**

After the employee’s position is set-up, you must add a job for the New Hire.

**Editing Job Data**

The final step in the New Hire Wizard is the **Job Data** screen. This screen is used to capture the most important information related to an employee’s job. The majority of the fields on this screen populate based on the **Position Data** screen. Fields that can be edited for Job Data are dependent on the E-Class and may include: Suffix, Job Title, Job FTE, Pay Rate, Job Change Reason, Timesheet COA and ORG, Time Entry Method, Leave Category, Accrue Leave, job Labor Distributions, and Job Comments.
Figure 12: Job Data screen

1. Review the Job Data screen.
2. Edit any fields that require changes.
3. Click Continue.
   The Employee Record View appears.

Adding Job Comments

Comments entered in the Job Comments section will feed to Banner and become a permanent part of the employee job record.

1. Enter comments in the Job Comments field.
2. Click Add Comment.
   The Job Comment is saved.
3. Click Continue.
   The Employee Record View appears.

Figure 13: Adding Job Comments – Job Data screen

Reviewing the New Hire Information

Once you complete the New Hire Wizard, the Employee Record View appears, showing the proposed change(s) generated in the transaction. From this screen, you can:

- Verify and edit information for the proposed change.
- Attach supporting documentation using the Attachments tab.
- Track NESSIE New Hire Forms completion.
- Reset NESSIE logon information.
- Add an additional component to the transaction.
- Save the transaction.
- Route the transaction.
- Send the transaction to a group or individual not in the predetermined routing path.
NESSIE New Hire Forms

The **New Hire Forms** tab is displayed in the Employee Record View of a New Hire transaction. In this tab, you can:

- Check the status of the employee’s NESSIE New Hire Forms.
- Reset the NESSIE New Hire password.
- Extend the NESSIE New Hire logon Expiration Date.

Checking the Status of NESSIE New Hire Forms

The New Hire Form Status list (see Figure 15) shows all of the New Hire Forms that the employee is required to complete. The forms listed vary based on the Employee Class. Forms marked with an asterisk are forms that are required to be completed through NESSIE New Hire by the employee before the transaction can be applied to Banner.

Resetting the NESSIE New Hire Password

If the employee has forgotten their password to logon to NESSIE New Hire, you can reset it:

1. From the **Employee Record View**, click the **New Hire Forms** tab (see Figure 15).
2. Verify that the Unit Contact Email and Employee Email (if desired) addresses are correct.
3. Click **Reset New Hire Password** link.

A new screen will appear. Enter the Logon ID and click Search. Once the information is returned, the Reset Password button appears. Click the Reset Password button and a system generated email is sent to the Unit Contact Email address as well as the Employee Email address, if provided.
**HINT:** NESSIE New Hire passwords are always reset the first letter of the employee’s last name, followed by their birthday in *mm/dd/yy* format. For example, if the last name is Jones and the birthday is 05/15/1970, the password would be reset to *J05151970*.

---

**Extending the NESSIE New Hire Expiration Date**

The employee’s access to NESSIE New Hire will be set to expire either 60 days from the Hire Date or 60 days from the date the transaction was started in the HR Front End (whichever occurs later). You can extend this date, if needed, as long as the Purge Date has not yet occurred.

1. From the Employee Record View, click the New Hire Forms tab (see Figure 15).
2. Enter a new date in the Expiration Date field.

*The new Expiration Date displays. The Purge Date is extended appropriately.*

---

![Figure 15: New Hire Forms screen](image_url)

**Figure 15: New Hire Forms screen**

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Routing the Transaction

To move the transaction to the next stop on the route path:

1. Click **Route**.

   Any informational or error messages are displayed in the yellow message area in the Employee Record View. If transaction is routed successfully, message will display showing the routing destination.

![Employee Record View]

*Figure 16: Success Routing Message – New Hire Transaction*
Appendix A: Screenshots from HRFE Video

Welcome to the:

New Hire Transaction

course
This course will help to equip you when you are working with New Hire transactions in the HR Front End Application.

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<th>CHAPTER</th>
<th>YOU WILL LEARN ABOUT</th>
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<td>• Common Terminology</td>
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<tr>
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<td>• What a New Hire transaction is</td>
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<td></td>
<td>• New Hire Quick View</td>
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<td>2 – Creating New Hire Logon</td>
<td>• How to initiate a New Hire transaction</td>
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<td></td>
<td>• How to search Banner and I Card</td>
</tr>
<tr>
<td></td>
<td>• How to enter Demographic information</td>
</tr>
<tr>
<td></td>
<td>• How to determine Employee Class and SURS eligibility</td>
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<td></td>
<td>• How to review</td>
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<tr>
<td></td>
<td>• How to create a Nessie New Hire Logon</td>
</tr>
<tr>
<td>3 – Adding a Position</td>
<td>• How to select a Position</td>
</tr>
<tr>
<td></td>
<td>• How to change/enter information on the Position Data screen</td>
</tr>
<tr>
<td>4 – Adding a Job</td>
<td>• How to select and Add a Job</td>
</tr>
<tr>
<td></td>
<td>• How to enter a Job Comment</td>
</tr>
<tr>
<td>5 – Reviewing the New Hire in ERV</td>
<td>• How to review the transaction in the Employee Record View</td>
</tr>
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<td></td>
<td>• About the Proposed Changes</td>
</tr>
<tr>
<td></td>
<td>• About the New Hire Forms Tab</td>
</tr>
<tr>
<td></td>
<td>• How to Route</td>
</tr>
<tr>
<td>6 – Course Review</td>
<td>• You will participate in activities that will assess your understanding of the content covered in this course</td>
</tr>
</tbody>
</table>

Click the Next button to continue.
Appropriate Use and Security of Confidential and Sensitive Information

Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.

- Do NOT share passwords or store them in an unsecured manner
- Do NOT leave workstation unattended while logged on to administrative information systems
- Do NOT share confidential and sensitive information with anyone, including colleagues, unless there is a business reason
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- Secure reports containing confidential and sensitive information (e.g. FERPA, EEO, or HIPAA protected data)
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.
Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What a New Hire transaction is
- New Hire Quick View
New Hire Wizard - Description of Roles & Terminology

Throughout this course, various terms will be used to describe the roles associated with processing New Hire transactions. The following screens provide you with terms and definitions that will be of assistance to you in this course.

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<thead>
<tr>
<th>ROLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire</td>
<td>The person being added to the University System via the HR Front End New Hire transaction.</td>
</tr>
<tr>
<td>User</td>
<td>The person using the HR Front End Application to enter transaction information. Initiators, Routers, Appliers, and FYI’ers are the four types of users described in this course.</td>
</tr>
<tr>
<td>Initiator</td>
<td>The Unit/Department person that starts the transaction.</td>
</tr>
<tr>
<td>Router</td>
<td>A user who has the ability to make changes to the transaction/record, return the transaction/record, to the initiator or route the transaction/record horizontally or vertically.</td>
</tr>
<tr>
<td>Applier</td>
<td>A user who performs the final review, update and submission of the transaction/record.</td>
</tr>
<tr>
<td>FYI’er</td>
<td>A user receiving a copy of a transaction for informational purposes only.</td>
</tr>
<tr>
<td>TERM</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Academic Hourly</td>
<td>Employees who provide professional or technical support on a temporary hourly basis. Minimum Education Requirement: Bachelors Degree. Pay Cycle: Bi-weekly.</td>
</tr>
<tr>
<td>Academic Professional</td>
<td>Employees who serve in a professional capacity in the areas of administration, research and public engagement. Minimum of a Bachelors Degree required. Pay Cycle: Monthly. Examples: Director, Research Engineer, Communications Specialist.</td>
</tr>
<tr>
<td>Academic Unpaid</td>
<td>Official affiliates of the University. Minimum Education Requirement: Bachelors Degree. Pay Cycle: Monthly, but no compensation is involved.</td>
</tr>
<tr>
<td>Civil Service</td>
<td>Employees hired under Civil Service rules and regulations who may serve in a professional or administrative support capacity. This group also includes the crafts and trade, office support, building and grounds, laboratory support, and a variety of other roles. Education Requirements vary by position. Pay Cycle: Bi-weekly. Examples: Accountant, Electrician, Staff Secretary, Building Service Worker.</td>
</tr>
<tr>
<td>Faculty and Other Academics</td>
<td>Employees whose main focus may be teaching, research, and public engagement. Advanced degree required. Pay Cycle: Monthly. Faculty Examples: Professor, Associate Professor, Assistant Professor. Other Academic Examples: Instructor, Lecturer.</td>
</tr>
<tr>
<td>Graduate Assistants and Pre-Doctoral Fellows</td>
<td>Graduate Assistants are graduate students who are also employed in a research, teaching assistant, or other capacity. Pre-Doctoral Fellows are graduate students with a fellowship. Minimum Education Requirement: Bachelors Degree/Advanced Degree. Pay Cycle: Monthly. Examples: Graduate Assistant, Graduate Research Assistant, Graduate Teaching Assistant, Pre-Doc Fellow.</td>
</tr>
<tr>
<td>Graduate Hourly</td>
<td>Graduate students who are employed in an hourly support role. This role does not entitle them to a tuition waiver. Minimum Education Requirement: Bachelors Degree. Pay Cycle: Bi-weekly.</td>
</tr>
<tr>
<td>Non-Exempt Employee</td>
<td>Non-Exempt employees receive hourly wages and are subject to wage and hour laws, i.e. overtime pay.</td>
</tr>
</tbody>
</table>
### New Hire Wizard - Description of Roles & Terminology Continued

<table>
<thead>
<tr>
<th>TERM</th>
<th>DEFINITION</th>
<th>TERM</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civil Service Web/Department Time Entry</td>
<td>The employee's hours may be approved through a Web environment where the employee inputs their hours and it is routed to a supervisor for approval. With Department Time Entry a representative of the department enters hours worked, vacation, etc., based on signed paper time sheets.</td>
<td>Post Docs and Interns</td>
<td>Positions which provide the individual financial support opportunities for research and clinical experience. Minimum Education Requirement: Advanced Degree. Pay Cycle: Monthly. Examples: Post Doc Research Associate, Post Doc Fellows, Intern</td>
</tr>
<tr>
<td>Civil Service Time Report Feeder</td>
<td>Hours worked or benefits used are recorded in a system outside of Banner, such as Kronos. These hours are then fed directly into Banner.</td>
<td>Residents</td>
<td>Employees who are continuing their education/training after medical school to become doctors (in most instances). They are eligible for benefits depending on their visa status. Their leave accrual is determined by their contract. Therefore, when they separate, no accrued vacation is paid out. Minimum Education Requirement: Doctoral Degree. Pay Cycle: Monthly.</td>
</tr>
<tr>
<td>Employee Group</td>
<td>The University has employees divided into groups, which are referred to as Employee Groups. The groups reflect the commonality of the hiring process, benefits eligibility, pay frequency, and other factors.</td>
<td>Retirees</td>
<td>Employees that have retired from the University, but have been re-hired. Some must be approved by the Board of Trustees to be re-hired for a specific project and timeframe.</td>
</tr>
<tr>
<td>Exempt Employee</td>
<td>Exempt employees are those who are exempt from certain wage and hour laws, i.e. overtime pay.</td>
<td>Students</td>
<td>Undergraduate students employed in a variety of roles as needed by campus units and departments. Financial support may be tied to Federal Work Study Program. Minimum Education Requirement: Must be an Undergraduate student. Pay Cycle: Bi-weekly</td>
</tr>
<tr>
<td>Extra Help</td>
<td>Provide clerical, technical, or other general/non-clerical support on a temporary hourly basis. Minimum Education Requirement varies by position. Pay Cycle: Bi-weekly</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# New Hire - Button Functionality

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>FUNCTIONALITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply</td>
<td>The <strong>Apply</strong> feature completes the transaction and applies the data to Banner. The User must have <strong>Apply</strong> permissions for this button to be active. The <strong>Close</strong> button enables the user to exit the transaction.</td>
</tr>
<tr>
<td>Close</td>
<td>The <strong>Continue</strong> button is used to proceed through the screens of a Wizard.</td>
</tr>
<tr>
<td>Continue</td>
<td>The <strong>Delete Transaction</strong> button is used to delete a transaction from the system.</td>
</tr>
<tr>
<td>Delete Transaction</td>
<td>The <strong>Print Friendly View</strong> button opens a separate window that will align the data from the current screen in a format that can be easily printed.</td>
</tr>
<tr>
<td>Print Friendly View</td>
<td>The <strong>Route</strong> feature sends the transaction on to the next stop in the predetermined routing for the transaction.</td>
</tr>
<tr>
<td>Route</td>
<td>The <strong>Save</strong> button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User’s Inbox (My Inbox).</td>
</tr>
<tr>
<td>Save</td>
<td>The <strong>Send To</strong> feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.</td>
</tr>
</tbody>
</table>

[Click the Next button to continue]
### New Hire Wizard - E-Class Determination

#### Employee Group

<table>
<thead>
<tr>
<th>EMPLOYEE GROUP</th>
<th>DETERMINATION QUESTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - FACULTY</td>
<td>1. Does the employee hold a J1, J2, F1, or F2 Visa?</td>
</tr>
<tr>
<td>B - ACADEMICS</td>
<td>2. Annual Salary</td>
</tr>
<tr>
<td>G - GRADS/PRE-DOC FELLOWS</td>
<td>3. Total % Employed</td>
</tr>
<tr>
<td>P - POST-DOC FELLOWS/RES ASSOC./INTERN</td>
<td>4. Length of Academic Contract</td>
</tr>
<tr>
<td>R - RESIDENTS</td>
<td>5. Service Begin and End Dates (Contracts less than 9 months)</td>
</tr>
<tr>
<td>C - CIVIL SERVICE WEB DEPT TIME ENTRY</td>
<td>6. Pay Basis (Contracts 9 months or greater)</td>
</tr>
<tr>
<td>D - CIVIL SERVICE TIME REPORT FEEDER</td>
<td>7. Is the New Hire receiving a retirement allowance from SURS?</td>
</tr>
<tr>
<td>E - CIVIL SERVICE EXTRA HELP</td>
<td>8. Is the New Hire currently a police officer/firefighter or will they hold a police position?</td>
</tr>
<tr>
<td>H - ACADEMIC HOURS/HOURLY</td>
<td>9. Non-work period begin and end dates (FLEX year or Seasonal Employees only)</td>
</tr>
<tr>
<td>S - STUDENTS</td>
<td>10. Is the New Hire receiving a retirement allowance from SURS?</td>
</tr>
<tr>
<td>T - RETIREE/ANNUITANT</td>
<td>11. Is the New Hire currently a police officer/firefighter or will they hold a police position?</td>
</tr>
<tr>
<td>U - UNPAID</td>
<td>12. Is this position seasonal?</td>
</tr>
<tr>
<td>V - VIRTUAL</td>
<td>13. Is the employee an Academic or Grad Hourly?</td>
</tr>
</tbody>
</table>

No additional information required.
Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What a New Hire transaction is
- New Hire Quick View
Chapter 2

Creating New Hire Logon

In this Chapter, you will learn:

- How to initiate a New Hire transaction
- How to search Banner and I Card
- How to enter Demographic information
- How to determine Employee Class and SURS eligibility
- How to review
- How to create a Nessie New Hire Logon
To begin, select **Initiate New Hire** from the transactions menu.
Notice: We have preselect No for you. If you select Yes, you must enter a UIN/Banner ID in the search because an Undergraduate or Graduate student already will have an assigned UIN.

In this new hire a Student (Undergraduate or Graduate) now or have they been since 2009?

No

Search

Required fields

UIN/BANNER ID:  
SSN:  
LAST NAME:  
FIRST NAME:  
BIRTHDATE:  
Enter SSN  
Enter Last Name  
Enter First Name  
Enter Date

Search  
Reset Search

You have now entered the New Hire Wizard. You begin a New Hire transaction by searching the University systems to see if the person being hired has an existing record. The Social Security Number, Last Name, and Birth Date are required to perform this search.
Notice: We have preselect No for you. If you select Yes, you must enter a UIN/Banner ID in the search because an Undergraduate or Graduate student already will have an assigned UIN.

Enter the following information:
1. SSN 333121444
2. Last Name Doe
3. Birthdate 04/30/1978

You have now entered the New Hire Wizard. You begin a New Hire transaction by searching the University systems to see if the person being hired has an existing record. The Social Security Number, Last Name, and Birth Date are required to perform this search.
Any potential matching results from Banner and/or iCard are displayed. If no potential matches are found, the message "The information you entered was not found. Click Continue to complete the new hire process using the criteria entered in your search" is displayed in the yellow message area.

If either the Social Security Number entered or the combination of the Last Name and Birthdate are found in Banner and/or iCard, a matching result is displayed in a table on the Search Banner & iCard screen.

If a matching record is found in Banner and/or iCard, the Employee Status is T - Terminated, you can continue the New Hire transaction as a Rehire.

If a matching record is found in Banner and/or iCard, but the Employee Status is A - Active, the Active Employee screen appears. You must add a new job using an Add a Job or Reappointment transaction instead.
The next step in the New Hire Wizard is the Demographics Information screen. This screen contains information such as the Home Chart Org, citizenship information, and contact information for the new hire.

The fields highlighted in yellow have already been filled in for you.

Enter in the following fields:
1. Hire Date: 1/1/2010
2. Mail Code: 123
3. Line 1 (campus primary office address): 2001 S. First St.

Click the enter key on your keyboard after entering each item of information.

Click the Next button to continue.
The next step in the New Hire Wizard is the Demographics Information screen. This screen contains information such as the Home Chart Org, citizenship information, and contact information for the new hire. The fields highlighted in yellow have already been filled in for you.

Enter in the following fields:
1. Hire Date: 1/1/2010
2. Mail Code: 123
3. Line 1 (campus primary office address) 2001 S. First St.

Click the enter key on your keyboard after entering each item of information.

Click the Next button to continue.
<table>
<thead>
<tr>
<th>Required Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Populated from New Hire search screen and is not editable.</td>
</tr>
<tr>
<td>First Name</td>
<td>Enter the employee's first name. This will populate if the first name was entered in the New Hire Search screen.</td>
</tr>
<tr>
<td>Social Security</td>
<td>Populated from New Hire search screen and is not editable.</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Populated from New Hire search screen and is not editable.</td>
</tr>
<tr>
<td>Gender</td>
<td>Select the employee's gender from the drop-down menu.</td>
</tr>
<tr>
<td>Unit Contact Email</td>
<td>Enter the email address for the unit contact. The system will auto-generate an email that contains NSSIE New Hire login information for the employee to the address entered.</td>
</tr>
<tr>
<td>Citizenship</td>
<td>Select the citizenship status from the drop-down menu.</td>
</tr>
<tr>
<td>Chart of Accounts</td>
<td>Select the COA from the drop-down menu.</td>
</tr>
<tr>
<td>Organization</td>
<td>The Organization list will filter based on the COA. Select from the drop-down menu.</td>
</tr>
<tr>
<td>HR Campus</td>
<td>Will default based on the COA selected. Edit if necessary.</td>
</tr>
<tr>
<td>Hire Date</td>
<td>Enter the date the hire is effective. Month / Day / Year</td>
</tr>
<tr>
<td>Login Expiration</td>
<td>The date that the NSSIE New Hire login will expire. The Logon Expiration field will automatically be populated to sixty days from the hire date or from the transaction date, whichever is later. This date can only be edited by Central HR.</td>
</tr>
<tr>
<td>Mail Code</td>
<td>Enter the Campus Mail code for the employee.</td>
</tr>
<tr>
<td>Campus Mail Location</td>
<td>Select the Campus Mail location from the drop-down menu.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Enter the employee's work street address.</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>These fields will default for Urbana, Chicago and Springfield Campus Mail addresses and will not be editable. The fields must be completed for Global and Off-campus ACES Extension Addresses.</td>
</tr>
</tbody>
</table>
If you realize the SSN, Last Name or Birthdate are incorrect, you must select the Search link in the breadcrumb because a new search is required.
Notice that the **Transaction ID** has now been generated. This number can be used to associate with this transaction.

The next step in the New Hire Wizard is the **Employee Class and Benefit Category Determination** screen. This screen determines the new hire’s employee class, benefit category, and SURS eligibility. To make these determinations, the HR Front End populates the questions on this screen based on the employee group selected and the answers to subsequent questions. For a complete list of questions that will appear according to Employee Group, click the **Employee Group** button below.
**New Hire Transaction - HR Front End**

- **Employee Group:** A, Faculty and Other Academics
- **Does the Employee hold a J1, J2, F1, or F2 Visa?** No
- **What is the length of the academic contract?** Greater or equal to 9 months
- **What is the Pay Basis?** 9/12

**Employee Information**

- **Annual Salary:** Enter salary
- **Total % Employed:** Enter percentage

**Eligibility:**

- If the appointment is not benefits eligible, enter a zero in the Annual Salary field.

**Notes:**

- After our choice for the A, Faculty and Other Academics Employee Group has been made, we will have to enter information pertaining to Visa (which defaults to the Citizenship choice on the Demographics Screen), Salary, Academic Contract, and Pay Basis.
- 1. Enter Annual Salary: 50000
- 2. Total % Employed: 100 (unlike FTE, where a decimal is entered. Ensure that a whole number is entered in this field.)

Click the **Next** button to continue.
Employee Group: A- Faculty and Other Academics

Does the Employee hold a J1, J2, F1, or F2 Visa? No

What is the length of the academic contract? Greater or equal to 9 months

What is the Pay Basis? 9/12

After our choice for the A- Faculty and Other Academics Employee Group has been made, we will have to enter information pertaining to Visa (which defaults to the Citizenship choice on the Demographics Screen), Salary, Academic Contract, and Pay Basis.

1. Enter Annual Salary: 50000
2. Total % Employed: 100 ("unlike FTE, where a decimal is entered. Ensure that a whole number is entered in this field).

Click the Next button to continue.
# New Hire Wizard - Required Information for Employee Class Determination

<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Determination Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - Faculty and Other Academics</td>
<td>Does the Employee hold a J1, J2, F1, or F2 Visa?</td>
</tr>
<tr>
<td>B - Academic Professionals</td>
<td>Annual Salary</td>
</tr>
<tr>
<td>G - Grad and Pre-Doc Fellows</td>
<td>Total % Employed</td>
</tr>
<tr>
<td>P - Post-Doc Fellows / Research</td>
<td>Length of Academic Contract</td>
</tr>
<tr>
<td>Assoc / Intern</td>
<td>Service Begin and End Dates (Contracts less than 9 months)</td>
</tr>
<tr>
<td>R - Residents</td>
<td>Pay Basis (Contracts 9 months or greater)</td>
</tr>
<tr>
<td>C - Civil Service Web/Dept Time</td>
<td>Is the new hire receiving a retirement allowance from SERS?</td>
</tr>
<tr>
<td>Entry</td>
<td>Is the new hire currently a police officer/firefighter or will they hold a police position?</td>
</tr>
<tr>
<td>D - Civil Service Time Report</td>
<td></td>
</tr>
<tr>
<td>Feeder</td>
<td></td>
</tr>
<tr>
<td>E - Civil Service Extra Help</td>
<td></td>
</tr>
<tr>
<td>H - Academic Hourly &amp; Grad Hourly</td>
<td></td>
</tr>
<tr>
<td>S - Student</td>
<td></td>
</tr>
<tr>
<td>T - Retiree / Annuitant</td>
<td></td>
</tr>
<tr>
<td>U - Unpaid</td>
<td></td>
</tr>
<tr>
<td>V - Virtual</td>
<td></td>
</tr>
</tbody>
</table>

Click the **Next** button to continue.
Employee Class and Benefit Category Determination
Select the appropriate Employee Group from the list below.

**EMPLOYEE GROUP**
- A - Faculty and Other Academics

Based on the Employee Group you selected, additional SURS Eligibility information may be required.

Please answer the questions below.

Does the Employee hold a J1, J2, F1, or F2 Visa?
- Yes
- No

If the appointment is not benefits eligible, enter a zero in the Annual Salary field.

<table>
<thead>
<tr>
<th>ANNUAL SALARY</th>
<th>TOTAL % EMPLOYED</th>
</tr>
</thead>
<tbody>
<tr>
<td>50000.00</td>
<td>100</td>
</tr>
</tbody>
</table>

What is the length of the academic contract?
- Greater than or equal to 9 months

What is the 9/12?

Click **Continue**.
Notice the highlighted areas. This is where we have preselected the answers for you. If you were to select yes to the first question, you would not receive a second question and you would receive "If you select that this employee is receiving a retirement allowance from SURS, you must return to the Eclass screen and select "T" for their Employee Group".

**EMPLOYEE GROUP:** A. Faculty and Other Academics

Is the new hire receiving a retirement allowance from SURS?
- Yes
- No

Is the new hire currently a police officer/firefighter or will they hold a police position?
- Yes
- No

Click Continue.

The State Universities Retirement System (SURS) screen of the New Hire Wizard displays if the New Hire is SURS eligible, based on the answers given on the Employee Class and Benefit Category Determination screen. Your answers to these questions determine what SURS code is selected for the employee.
The New Hire Review screen displays a summary of all information entered to this point in the New Hire Wizard. Review the information.

If any changes are needed, click Edit in the corresponding quadrant or use the breadcrumbs at the top of the screen to return to the section needing the change. The HR Front End returns you to the appropriate page in the New Hire Wizard.

Click Continue.
A message appears warning you that continuing the transaction will generate a Logon ID and apply the data to Banner.

Click OK to continue.

A system generated email with instructions on logging into NESSIE New Hire is immediately sent to the Unit Contact email address and the Employee email address provided on the Demographic Information screen once the logon is generated.
Once the information on the New Hire Logon Review screen is confirmed and applied to Banner, the New Hire Logon Confirmation screen appears. This screen displays the employee’s NESSIE New Hire login information, a link to NESSIE New Hire, and the ability to print this data. Data entered to this point will not be editable in the New Hire Wizard.

Click Continue to select position information.
Chapter 2 Review

In this Chapter, you have learned:

- How to initiate a New Hire transaction
- How to search Banner and I Card
- How to enter Demographic information
- How to determine Employee Class and SURS eligibility
- How to review
- How to create a Nessie New Hire Logon
Chapter 3

Adding a Position

In this Chapter, you will learn:

• How to select a Position
• How to change/enter information on the Position Data screen
New Hire Logon Confirmation

New Hire Logon Information

- Last Name: Doe
- First Name: Jane
- Middle Name:
- Suffix:
- Login ID: @O402014
- Password: 0403078

New Hires may access Nessie New Hire at: https://newhiredev.uic.edu/newhire

Click Continue to select position information.

After you create the employee's New Hire logon, you must assign a position to the employee.
The next step in the New Hire Wizard is the Position Selection screen. This screen offers three methods of selecting position information:

1. Directly enter a position number
2. Search for a position
3. Create a new position

Hover each number for explanations of each option.

<table>
<thead>
<tr>
<th>COA</th>
<th>ORG</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100000 - Control - Payroll</td>
</tr>
</tbody>
</table>
Once you select a position, the next step in the New Hire Wizard is the Position Data screen. This screen allows you to edit existing position data or create a new position. Fields that can be edited include Position Title, Position Employee Class, Type, PAPE Number, Job Progression, Position Descriptors, Budget Profile, Budget COA, Budget ORG, and Position Labor Distribution.

In this course, we are not going to be making any changes on the Position Data screen.

Click the Next button to continue.
Chapter 3 Review

In this Chapter, you have learned:

- How to select a Position
- How to change/enter information on the Position Data screen
Chapter 4

Adding a Job

In this Chapter, you will learn:

- How to select and Add a Job
- How to enter a Job Comment
If you realize you have made a mistake in selecting your position, you can use the breadcrumb to take you back to previous screens.

After the employee's position is set-up, you must add a job for the New Hire.

Click Continue.
The final step in the New Hire Wizard is the Job Data screen. This screen is used to capture the most important information related to an employee’s job.

The majority of the fields on this screen populate based on the Position Data screen. Fields that can be edited for Job Data are dependent on the E-Class and may include: Suffix, Job Title, Job FTE, Pay Rate, Job Change Reason, Timesheet COA and ORG, Time Entry Method, Leave Category, Accrue Leave, Job Labor Distributions, and Job Comments.
Enter "test" into the Comments field.
Click Add Comment.

Comments entered in the Job Comments section will feed to Banner and become a permanent part of the employee job record.
The comment you entered will have both your UserID and a time and date stamp. It is not deletable.
Chapter 4 Review

In this Chapter, you have learned:

- How to select and Add a Job
- How to enter a Job Comment
Chapter 5

Reviewing the New Hire in ERV

In this Chapter, you will learn:

- How to review the transaction in the Employee Record View
- About the Proposed Changes
- About the New Hire Forms Tab
- How to Route
Once you have added your comment on the Job Data screen, you are ready to continue to the Employee Record View.
The **Proposed Changes** accordion summarizes all of the changes proposed in this transaction. If there are multiple components for the transaction, click the **View** link to the left of the New Hire component. Click the **Wizard** link to make changes in the wizard.

Once you complete the New Hire Wizard, the **Employee Record View** appears, showing the proposed change(s) generated in the transaction. From this screen, you can:

- Verify and edit information for the proposed change.
- Attach supporting documentation using the **Attachments** tab.
- Track NESSIE New Hire Forms completion.
- Reset NESSIE logon information.
- Add an additional component to the transaction.
- Save the transaction.
- Route the transaction.
- Send the transaction to a group or individual not in the predetermined routing path.

Click the **Next** button to continue.
### Proposed Changes

<table>
<thead>
<tr>
<th>ID</th>
<th>Change Date</th>
<th>Personnel Date</th>
<th>Job</th>
<th>TS Org</th>
<th>Job Change Reason</th>
<th>Change Type</th>
<th>Apply Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>215865</td>
<td>01/01/2010</td>
<td>01/01/2010</td>
<td>UA1251-00 LCTR</td>
<td>1-109000 Control - Payroll</td>
<td>HR001, New Hire</td>
<td>NEW</td>
<td></td>
</tr>
<tr>
<td>215867</td>
<td>01/19/2010</td>
<td>01/19/2010</td>
<td>LCTR</td>
<td></td>
<td></td>
<td>DEDN</td>
<td></td>
</tr>
<tr>
<td>215866</td>
<td>01/19/2010</td>
<td>01/19/2010</td>
<td>LCTR</td>
<td></td>
<td></td>
<td>DEDN</td>
<td></td>
</tr>
<tr>
<td>215865</td>
<td>01/19/2010</td>
<td>01/19/2010</td>
<td>LCTR</td>
<td></td>
<td></td>
<td>DEDN</td>
<td></td>
</tr>
<tr>
<td>215870</td>
<td>01/19/2010</td>
<td>01/19/2010</td>
<td>LCTR</td>
<td></td>
<td></td>
<td>DEDN</td>
<td></td>
</tr>
</tbody>
</table>

The **JOBS** tab and the **Job Detail** accordion are highlighted in red indicating that you, the user, entered the job information.

---

The **New Hire Forms** tab is displayed in the Employee Record View of a New Hire transaction. In this tab, you can:
- Check the status of the employee's NESSIE New Hire Forms
- Reset the NESSIE New Hire password
- Extend the NESSIE New Hire logon Expiration Date
If the employee has forgotten their password to logon to NESSIE New Hire, you can reset it.

The New Hire Form Status list shows all of the New Hire Forms that the employee is required to complete. The forms listed vary based on the Employee Class. Forms marked with an asterisk are forms that are required to be completed through NESSIE New Hire by the employee before the transaction can be applied to Banner.

1. Verify that the Unit Contact Email and Employee Email (if desired) addresses are correct.
2. Click Reset New Hire Password link.
The new window appears. You must first enter the Logon ID into the Search field.
Once the results have been returned the password is ready to be reset.
The Password Reset message appears. A system generated email is sent to the Unit Contact Email address as well as the Employee Email address, if provided.
The employee's access to NESSIE New Hire will be set to expire either 60 days from the Hire Date or 60 days from the date the transaction was started in the HR Front End (whichever occurs later). You can extend this date, if needed, as long as the Purge Date has not yet occurred.

Enter a new date in the Expiration Date field. The new Expiration Dated displays. The Purge Date is extended appropriately.
Once reviewed, the transaction is ready to be routed to the next stop.

Click either Route button to continue.
Success messages will appear each time the transaction has been successfully routed to a different stop. As the transaction travels along the routing path, users will be able to retrieve the transaction from their inboxes so that they can take ownership of it, review it, and send it to the next stop in the routing path.

This will happen all the way to the Apply stop in the routing path.
Chapter 5 Review

In this Chapter, you have learned:

- How to review the transaction in the Employee Record View
- About the Proposed Changes
- About the New Hire Forms Tab
- How to Route
You have reached the conclusion of the New Hire Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the **COMPLETE COURSE** button below.