NC STATE
UNIVERSITY

HR Dashboard &
Job Action Request
(JAR) Overview

Contents

Functional Summary of the 9.2 Update

PeopleSoft 9.2 will offer some new features and help streamline transaction processing for HR campus users. The new HR Dashboard will allow users to select from multiple quick link options accessing specific transaction pages associated with the updated HR System. The *"HR Quick Links"* will streamline the navigation process using the HR Dashboard, making it easier for users to initiate, modify, review and/or approve transactions.

Job Action Request (JAR) is a new feature with the 9.2 upgrade that utilizes an activity menu to track the progression through the different stages of approval. This document covers the fundamentals of accessing and utilizing the HR Dashboard within the JAR application.

Users with the appropriate security level access or SAR access can initiate hire/rehire transactions, additional jobs, transfers, promotions, and separations using JAR. The JAR process guides the user through the job data pagelets and fields required to initiate a transaction. The individual user's SAR access will dictate which JAR transactions can be performed within the college division. Once a transaction completes the approval process (Dept./Central HR) it will transition over into job data and the JAR transaction will become a permanent record in the HR system.

Background Checks (BGC) have been incorporated into the JAR as part of the hiring process. The JAR transaction allows the initiator to select which background check options they would like performed based on the job attributes. Once the transaction is submitted, the selected candidate will receive an email notification containing a link to the NC State University portal. For security purposes, a second email will follow the first email providing a user ID and password to log into the portal. The candidate will have two weeks to complete and submit the BGC form back to NC State University for processing. Once the BGC is approved, the transaction will advance to the next stage.

Another new feature within JAR is the ability to attach the hiring paperwork associated with the transaction (e.g. offer letters, reference checks & patent agreement). Transaction approvers can review the attached documents and it will become a part of the permanent record in the HR system.

The JAR tool will streamline the overall hiring process and create a permanent transaction file that can be retrieved in the HR system. College divisions should account for the time it takes to process a JAR transaction through all the approval stages and plan accordingly. Central HR recommends allowing a minimum of two weeks from the start of a JAR transaction to the final stage of approval. If you have questions, consult with your HRIM representative, https://www.ncsu.edu/human_resources/hrim/csr.php.

Basic Overview of JAR Progression

Job Action Requests (JAR) will be new for college division HR representatives, but it is similar to the Start Employment Process (SEP) used in version 9.1. JAR transactions will progress through different stages of approval before migrating over to job data in the HR System. Transaction progression will be similar with both Perm (Faculty, Non-Faculty, Postdocs & Staff) and Non-Perm (Students, Temps & No Pays) hires.

- Perms equate to EHRA, Postdoc or SHRA employee classes
- Non-Perms equate to Students, Temps or No Pay employee classes

Note: All Student Graduate (Grad) Transactions should be processed using NextGen

The following table provides an overview of the JAR progression stages. It also indicates when email notifications are sent to the candidate, transaction initiator and transaction approver.

JAR Progression Stages	Description	Email Notification
Initiate JAR	Divisional or Department HR Rep. initiates the transaction.	Non-Perm hire Candidates
College/Unit Level Approval	1. Only required when a dept. level initiator hires a Perm employee. 2. College level 2 approval required before email notification. *Note: If a college level 2 approver initiates the Perm hire, this would be considered a pass through stage.*	Perm hire Candidates
Monitor Background Check (BGC)	Required with all hires except student workers and visitor no pays. *Note: The Empl_ID is generated after the BGC has been approved (new hires only)*	Candidate when BGC is submitted back to NCSU JAR Initiator when complete
Confirm Job Request	Only required when BGC endorsement has conditional, risk-based duties.	JAR Initiator
Review Job Request	Initiator review	JAR Initiator
College/Central HR Level Approval	Final Approval before transitioning to job data.	College Approver
Populate Education Data	Updated by Central HR when education is confirmed.	N/A

Monitoring the Background Check (BGC)

As illustrated in the previous table, the Background Check (BGC) has been incorporated into the JAR progression. This means the hiring dept. will no long have to process:

- The Personal Information Form (PIF)
- Person of Interest (POI) request for brand new employment
- The paper Background Check (BGC) Form

When a transaction has been submitted for approval, it will automatically generate an email notification to the candidate. The email notifications will contain the necessary information to log into the MYPACK Portal and complete the personal data required for the BGC. The candidate must do the following:

- Complete the form
- Electronically sign the form
- Submit the form back to NC State University to begin BGC program

Once the BGC has been approved/endorsed, it will advance to the next stage of approval. The *Employee_ID* will be generated for brand new employees, including employment classes that do not require a BGC.

Campus divisions will probably make adjustments to their own internal hiring process with the implementation of JAR. Each division must account for the time it takes to imitate and complete a transaction before it transitions over to job data.

Central HR recommends a **minimum of two weeks** from the time a transaction is initiated to the time it reaches the last stage in the approval process. The following items reflect some variables associated with the completion of a transaction:

- The candidate will not receive the hiring email notification to complete the electronic BGC form until the JAR (hire) transaction is initiated and submitted.
- Once the candidate receives the email notifications, they will have up to 14 days to complete the electronic form and send it back to NC State University.
  - *Communication is essential between the hiring dept. and the candidate to help expedite a hire transaction.*
  - *Typically, background checks can be endorsed within 3-5 days but it could take longer depending on the information provided by the candidate and the various locations they may have lived.*
- A candidate selected for employment should not start working until the transaction has been approved at all levels.
- All required paperwork must be attached to the transaction before Central HR will approve any Perm hires.

Job Action Request (JAR) – SAR Roles

SEP/VPAF Role	New JAR Role	JAR Description
NCH HR CAMPUS VPAF	JAR-Modify & Separate Non-Perm Transactions	This role will allow users to initiate JAR Modifications & Separations on "Active" temps, students and no pay employees.
NCH HR CAMPUS SEP Initiator	JAR-Initiator for Perm & Non-Perm Transactions	This role will allow users to initiate JAR transactions on both Perm and Non-Perm hire/rehire transactions.
NCH HR CAMPUS VPAF Approver 1	JAR-Approver 1 * Non-Perm transactions	This role will allow users to approve JAR Non-Perm transactions for temps, students and no pay employees at the college level.
NCH HR CAMPUS Base User	JAR-Approver 2 ** College/Central HR Level	This role will allow users the ability to review "Perm-Hire" JAR transactions initiated by JAR Initiators before a Background Check is sent to the candidate.

Divisional HR personnel currently set up in PeopleSoft (PS) 9.1 with the "SEP/VPAF" roles (left column) will automatically transition to the equivalent JAR Role in the middle column.

College divisions will have to determine which new "JAR Roles" their HR personnel will require and submit a Security Access Request (SAR) to make updates for each individual.

If a new college level HR administrator is hired after we go live with PS 9.2, each individual JAR Role will have to be assigned to the individual in SAR.

 *Note: If a user is set up in PS 9.2 with the "JAR-Approver 1" role, they will also be able to Initiate JAR transactions.

 **Note: If a user is set up in PS 9.2 with the "JAR-Approver 2" role, they will also be able to Initiate JAR transactions.

 FYI: If a user is set up with "JAR Approver (1 or 2)" role, they will not be able to approve any transaction they initiated.

The HR DASHBOARD Panel

The "HR DASHBOARD" contains information and quick access to the most common management areas in the HR System. The following reflects a snapshot of the HR DASHBOARD panel:

The HR Dashboard data is dependent on the user's security level access, and the panel can be organized by the individual user. The following provides a brief description of the panels or monitors starting from the top left corner, then moving down and across:

- **HR Quicklinks** – quick navigation to the most common transactions panels
- **Pay Lockout Monitor** – "YES" indicates payroll lockout for the current pay period
- **Separation Monitor** – reflects the latest separations within a 4 week timeframe of the current date
- **Perm Worklist** – reflects a dynamic list of transactions for Faculty, Non-Faculty, Postdocs & Staff
- **Non-Perm Worklist** – reflects a dynamic list of transactions for students, temps & no pay workers
- **My Temporary Employees Time** – quick access to direct report timesheet data
- **SHRA Probation Dates** – reflects an SHRA employee is within a month of achieving career status
- **Employee Headcount** – reflects the latest headcount by employee classification within the division/dept.

Users can customize their DashBoard by clicking on the "Content" link and selecting the pagelets they would like displayed.

Note: The remainder of this training material will focus on the HR Quicklink options.

Accessing the HR DASHBOARD

The "HR DASHBOARD" highlighted below contains *HR Quicklinks* navigation to the most common transaction areas that will be managed in the HR System:
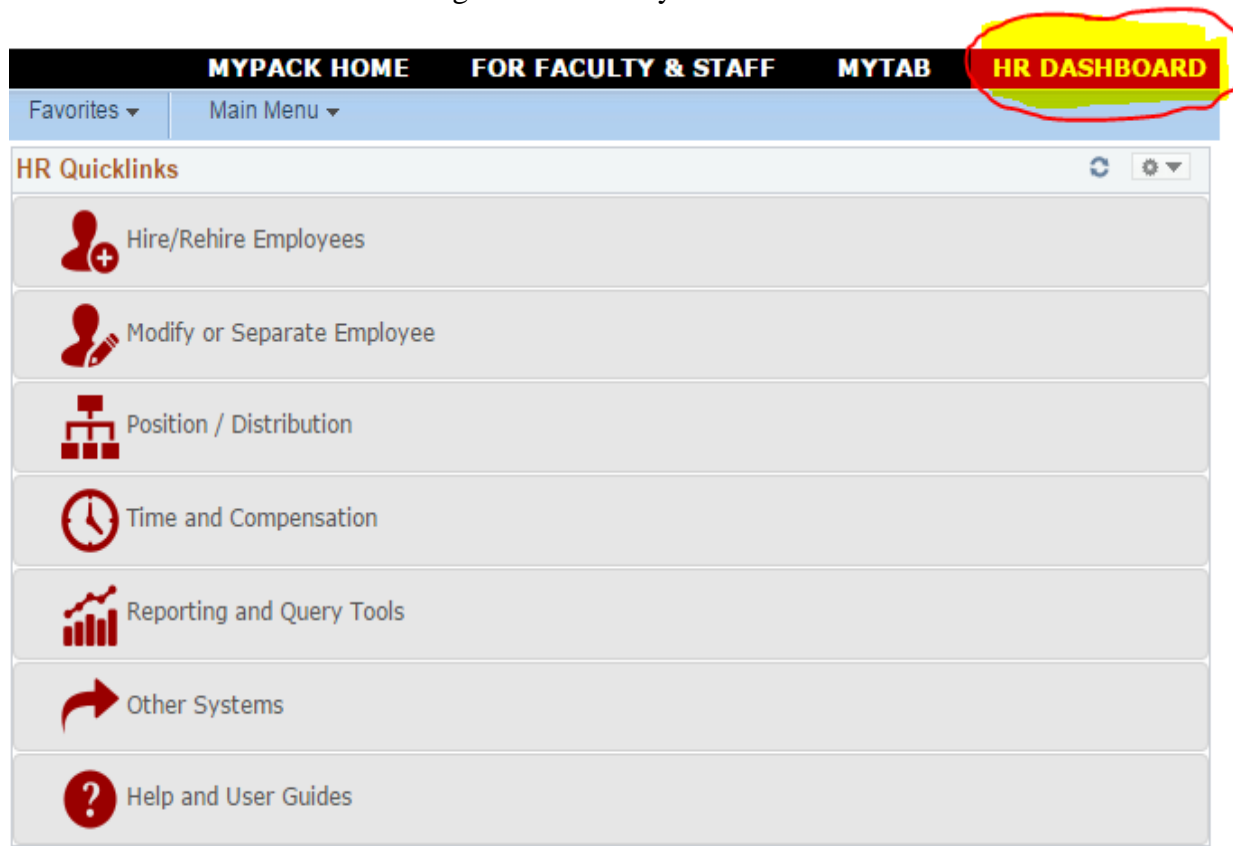
HR Quicklinks allow the user to navigate to following options:

- **Hire/Rehire Employees** – used to process hire transactions for all employee classifications
- **Modify or Separate Employee** – used to process specific transaction modifications on active employees in the HR system. The modifications that can be performed are limited and based on the employee classification. Once the drop down list opens, the user can see the modifications that can be performed.
- **Position/Distribution** – used to update position data and distribution setup information
- **Time and Compensation** – used by time administrators to access and update employee timesheet. EHRA "Additional Compensations can also be accessed from the drop down list
- **Reporting and Query Tools** – used by departmental HR personnel to access Query Manage, Report2Web and Labor Distribution
- **Other Systems** – used by key departmental HR personnel to access Web Leave and PeopleAdmin
- **Help and User Guides** – being developed…

HR Dashboard Hire Options

Hire/Rehire Employees

Hire/Rehire Employees options

- **Faculty, Non-Faculty & Staff** – used when processing faculty, post docs, non-faculty & staff hires
- **Students Worker and Temporary Assignments** – used when processing biweekly temp & student worker hires
- **Unpaid Assignments** – used when processing no pay or unpaid assignments
- **Rapid Rehire** (All empl_classes) – used if the individual has been employed within the past 6 months at NC State University. The individual being rehired must be returning to the same dept., job code and compensation rate. This option is typically used with temp employees returning after a 32 day break in service or with adjunct lecturers returning to teach a course within the same academic year. If the system does not locate the employee ID using the rapid rehire link, then use the hiring option that best describes the employee class.

HR Dashboard Modify Options

Modify or Separate Employees:
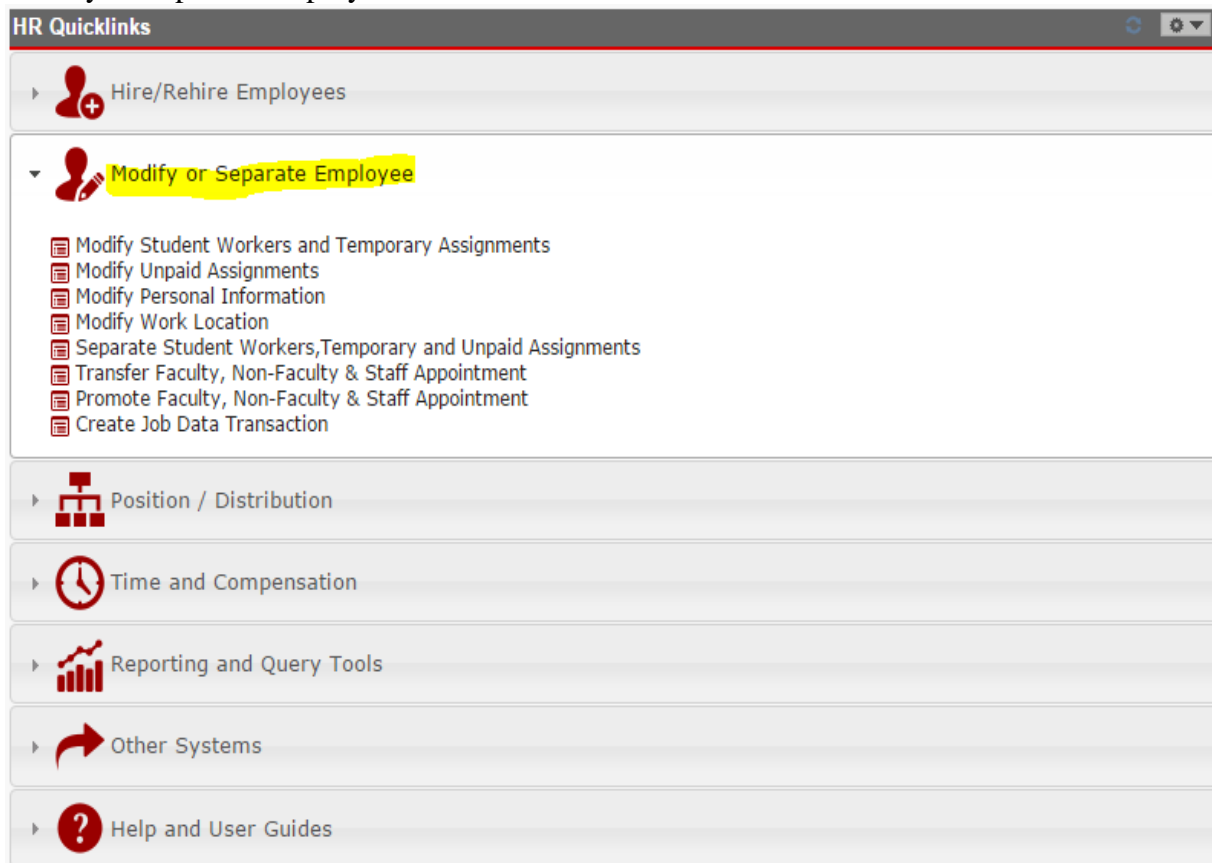
Modify or Separate Employee options

- **Modify Students Workers and Temporary Assignments** – used when processing transactions on current active temp & student workers
- **Modify Unpaid Assignments** – used when processing transactions on current active no pay and/or unpaid personnel
- **Modify Personnel Information** – used to update employee personal data but limited to (base user) HR personnel who have the appropriate security level access to make modifications
- **Modify Work Location** – used to update the employee's work location
- **Separate Student Workers, Temporary and Unpaid Assignments** – used to process separation actions for active students, temps & unpaid employees
- **Transfer Faculty, Non-Faculty & Staff Appointments** – used to process a transfer action involving a faculty, non-faculty or staff member. The receiving dept. is responsible for initiating the transaction.
- **Promotion Faculty, Non-Faculty & Staff Appointments** – used when processing a promotion action involving a faculty, non-faculty or staff member. The receiving dept. is responsible for initiating the transaction.
- **Create Job Data Transaction** – used to access the job data panel (base users only)

HR Dashboard Position Options

Position/Distribution:

Position/Distribution options:

- **Enter the description, work location and other information about a position** – used to access and update position data
- **Distribution Setup** – used to access and update distribution data on a specific position number and/or the employee ID
- **Create Redistribution for Temps and Supplemental Pay** – used to create redistribution for temporary employees and employees receiving supplemental pay
- **View and Update Redistribution** – used to view and update any redistributions

HR Dashboard Time & Compensation Options

Time and Compensation:

Time and Compensation options:

- **Enter and Edit Timesheets** – used to access, review and/or update employee timesheets
- **Display/Print Timesheet (Timekeeper)** – allows the timekeeper to print out employee timesheets
- **Approve Reported Time** – used to access employee timesheets that require approval before they can be processed for payment
- **EHRA Additional Compensation Request** – used to open up the additional comp panel and initiate EHRA additional payments that require approval

HR Dashboard Reporting & Query Tools

Reporting and Query Tools:
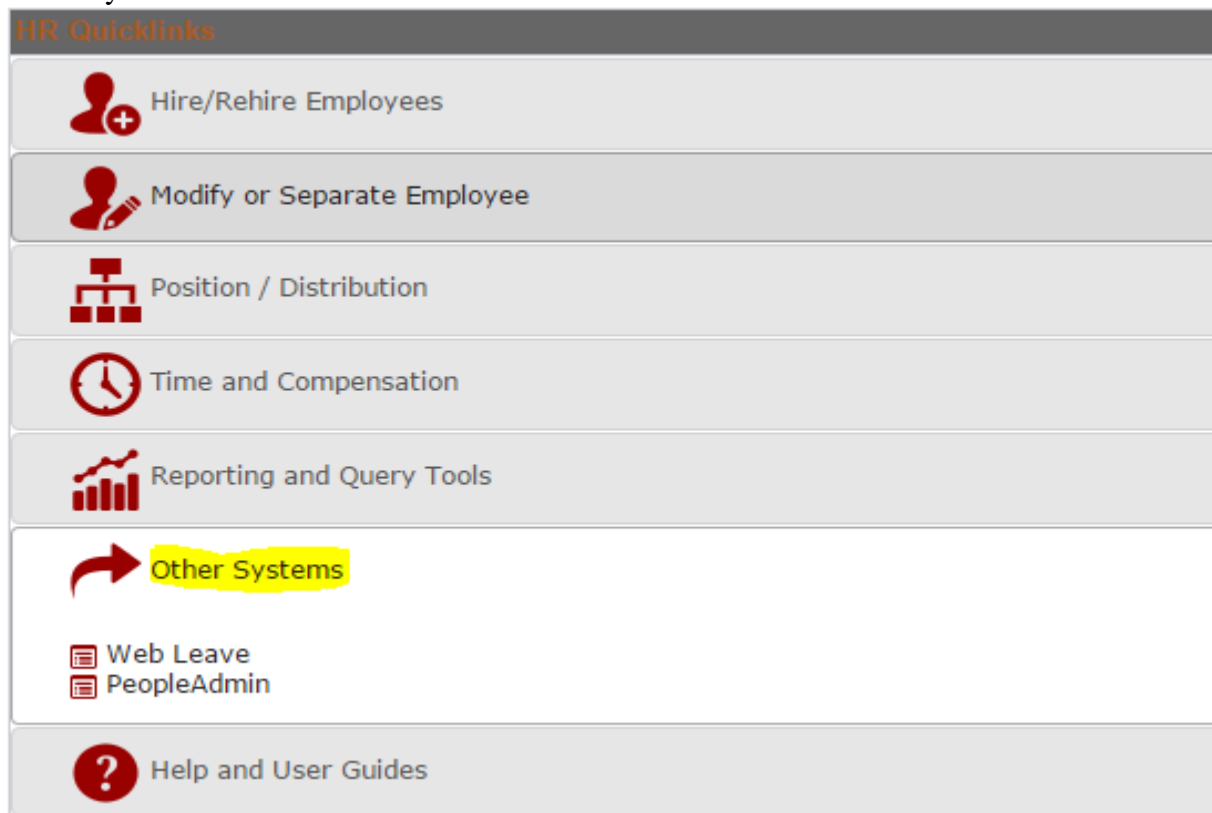
Reporting and Query Tools

- **Query Manager** – allows the user to create, edit and run queries
- **Query Viewer** – allows the user to create, edit and run queries
- **Report2Web** – used to access Report2Web (comp-control reports)
- **Position Control** – used to access the position control reports to retrieve Financial System salary budget data and HR Position budget data (base users only)
- **Labor Distribution** – used to access labor distribution reporting data

HR Dashboard Other System Options

Other Systems:

Reporting and Query Tools
- **Web Leave** – used to access and manage the web leave request
- **PeopleAdmin** – used to access the PeopleAdmin system with a valid user ID & password

Hire/Rehire Functionality

The following example reflects the initial page that appears when hiring a new employee or rehiring a previous employee who has been inactive in the HR system more than 6 months.

Please enter the Employee class, Start Date, and the Employee ID, if known, then select the 'NEXT' button below	
*Employee Class: [▼]	
*Desired Start Date: [ ] 📅	
Employee ID: [ ] 🔍	Next Clear

Employee Class is a required field. The following examples reflect the employee class option available:

Faculty, Post Docs, Non-Faculty & Staff

CVM House Officers
County Operational Supp
EHRA County Extension
EHRA Faculty
EHRA Non-Faculty
EHRA SAAO Tier 1
EHRA SAAO Tier 2
Law Enforcement Officers
Post Doc
SHRA Employee

No Pay, Temps & Student Workers

Access Only - No Pay
Student Workers
Temp - Exempt from FLSA (TME)
Temp- Subject to FLSA
Unpaid Faculty
Unpaid Non-Faculty

Desired Start Date is also a required field and indicates the first day of employment with NCSU.

If the selected candidate associated with the hire transaction has applied to be a student, enrolled as a student or been previously employed in any capacity at NC State University, an employee ID already exists in the HR system and should be entered in the *"Employee ID"* field above. Use search match if you are not sure the person has been affiliated with NC State University.

If a pending transaction already exists, the user would get results similar to the one illustrated below. The latest transaction <u>cannot continue</u> until the pending transaction has been approved or cancelled.

	Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Supervisor	Job Code	Job Title	Hours/Week	Hire Date	Job Status	Expected End Dt
1	001115543	999	02/28/2016	EHRA Faculty	120501	Art and Design	Chandra Cox	F011	Professor		40.00 02/28/2016	Pending	06/30/2017

Pending Job Actions exist

New transaction not allowed until pending transaction is approved or canceled.

If no pending transactions exist, the user would click the *"Next"* button to access the "Initiate Job Request" page.

The following examples reflect the JAR hiring page with different employment classes.

STW (Student Worker) Job Request Page

Initiate Job Request

Transaction ID: AG00005138 Empl ID: [redacted] Name: [redacted] Empl Class: Student Workers

Name

Name Prefix:
First Name: 2[redacted]
Middle Name:
Last Name: [redacted]
Name Suffix:

Employee's Work Location / Address

On Campus: On Campus ▼
*Building #: [   ] 🔍
*Room Number: [   ] 🔍
*Campus Box: [   ] 🔍

NCSU Data

*Candidate Email: r[redacted]@ncsu.edu
HR Hiring Proposal: [   ]

Time Keeping Location: E15 🔍 CCEE Lab
(KABA Punch EE's Only)

Job

Action: Hire
*Action Reason: ? Hire Student Worker ▼
*Effective Date: 03/01/2016 📅
*Expected Job End Date: 03/01/2017 📅
*Base Compensation: ? 10.000000 Hourly
*Tax Location Code: NC 🔍 North Carolina

*Job Code: ? TSW910 🔍 Student Worker, Enrolled@NCSU
*Department: 140123 🔍 Civil Engineering-Inactive
*Location: 021 🔍 Engineering-Dean's Office
*Supervisor ID: 000405721 🔍 [redacted]
*Standard Hours: 15.00 Hrs/Week FTE: 0.375 Total FTE: 0.375

Distribution Data

Fiscal Year: 2016   ☐ Work Against   Position Nbr:

	*Project ID	*Account	Override	*Percent	Amount		
1	221013 🔍	51450 🔍	☐	100.000	10.000	➕	➖

Totals: 100.000 10.00

Background Check

Please check all of the following that apply:
☐ I want to request a background check on this person
☐ This person could/will be driving an NCSU vehicle
☐ This person could/will be handling money or managing accounts
☐ This person could/will be working with minors (people under the age of 18 years old)
☐ This person will be living in University Housing for more than 3 days
☐ This person will be sponsored on an H-1 Visa
☐ A Commercial Drivers License (CDL) may be used in this job

☐ Please RUSH this Background Check

Comments for Background Check Group (Include Working Title from Posting Number, if applicable):
[   ]

*Department 480201 🔍
*Contact Name Vance Prince
*Contact Email viprince@ncsu.edu
*Contact Phone 919/515-4292

Comments for Reviewers / Approvers   Show Comments   Attachments
[   ]

[Save for Later]   [Submit for Approval]

NOTES:
The HR system is able to detect if a student worker meets the minimum criteria to be classified as a student.

If the HR system rejects the student worker employee classification, cancel the current transaction and start a new one with the correct Empl_Class.

"HR Hiring Proposal" is not required with student hires.

A Background Check (BGC) is not required for student hires unless the dept selects any option related to job duties listed under BGC.

If a BGC is required, verify the "Candidate Email" is correct in order for the electronic form to be sent to the student.

Time tracking is required for hourly employees and captured by identifying the unique Time Keeping Location (TKL).

Once the initial job page is completed, click the "Submit for Approval" button at the bottom of the page to advance to the next stage of approval.

TME (Temp-Exempt from FLSA) Job Request Page

Initiate Job Request

Transaction ID: AG00005244 Empl ID: NEW   Name: Steve McQueen   Empl Class: Temp - Exempt from FLSA

Name

Name Prefix:	
*First Name:	Steve
Middle Name:	
*Last Name:	McQueen
Name Suffix:	

Employee's Work Location / Address

On Campus:	On Campus	
*Building #:	068	Scott Hall
*Room Number:	00134	
*Campus Box:	7111	LIBRARY, D. H. HILL

NCSU Data

*Candidate Email:		*Temp Category:	Temp SP - As Needed
*HR Hiring Proposal:		

Job

Action:	Hire	*Job Code: ?	TE430	Temp Fiscal Affairs Prof
*Action Reason: ?	Hire Temp FLSA Exempt	*Department:	020502	Environmental Sciences
*Effective Date:	03/01/2016	*Location:	210	University Targeted Staffing
*Expected Job End Date:	02/01/2017			
*Base Compensation: ?	35,000.000000 Annual	*Supervisor ID:	000003799	
(Full Annualized salary at 1.0 FTE = $140000.00)		*Standard Hours:	10.00 Hrs/Week	FTE: 0.250 Total FTE: 0.250
*Tax Location Code:	NC North Carolina			

Distribution Data

Fiscal Year: 2016   ☐ Work Against   Position Nbr:

	*Project ID	*Account	Override	*Percent	*Amount		
1	301026	51410	☐	100.000	35,000.000	+	-
			Totals:	100.000	35,000.00		

Background Check

Please check all of the following that apply:

☑ I want to request a background check on this person
☐ This person could/will be driving an NCSU vehicle
☐ This person could/will be handling money or managing accounts
☐ This person could/will be working with minors (people under the age of 18 years old)
☐ This person will be living in University Housing for more than 3 days
☐ This person will be sponsored on an H-1 Visa
☐ A Commercial Drivers License (CDL) may be used in this job

☐ Please RUSH this Background Check

Comments for Background Check Group (Include Working Title from Posting Number, if applicable):

*Department	480201
*Contact Name	Wallace Driver
*Contact Email	wtdriver@ncsu.edu
*Contact Phone	919/515-7673

Comments for Reviewers / Approvers   Show Comments   Attachments

[Save for Later]   [Submit for Approval]

TMS (Temp-Subject to FLSA) Job Request Page

Initiate Job Request

Transaction ID: AG00005083 Empl ID: NEW   Name: Empl Class: Temp- Subject to FLSA

Name

Name Prefix: [▼]
*First Name: [   ]
Middle Name: [   ]
*Last Name: [   ]
Name Suffix: [▼]

Employee's Work Location / Address

On Campus: [On Campus ▼]
*Building #: [   ] 🔍
*Room Number: [   ] 🔍
*Campus Box: [   ] 🔍

NCSU Data

*Candidate Email: [   ]
*HR Hiring Proposal: PG150893SP
*Temp Category: [▼]
*Time Keeping Location: [   ] 🔍 ⬅
(KABA Punch EE's Only)

Job

Action: Hire
*Action Reason: ? [▼]
*Effective Date: 02/24/2016 📅
*Expected Job End Date: [   ] 📅
*Base Compensation: ? [   ] Hourly
*Tax Location Code: NC 🔍 North Carolina

*Job Code: ? [   ] 🔍
*Department: [   ] 🔍
*Location: [   ] 🔍
*Supervisor ID: [   ] 🔍
➡ *Standard Hours: [   ] Hrs/Week   FTE: Total FTE:

Distribution Data

Fiscal Year: 2016   ☐ Work Against   Position Nbr:

	*Project ID	*Account	Override	*Percent	Amount	
1	[ ] 🔍	51410 🔍	☐	[ ]	[ ]	➕ ➖

Totals: [   ] 0.00

Background Check

Please check all of the following that apply:
☑ I want to request a background check on this person
☐ This person could/will be driving an NCSU vehicle
☐ This person could/will be handling money or managing accounts
☐ This person could/will be working with minors (people under the age of 18 years old)
☐ This person will be living in University Housing for more than 3 days
☐ This person will be sponsored on an H-1 Visa
☐ A Commercial Drivers License (CDL) may be used in this job

☐ Please RUSH this Background Check

*Department 515001 🔍
*Contact Name Amy Coggins

Comments for Background Check Group (Include Working Title from Posting Number, if applicable):
[   ]

*Contact Email abcoggin@ncsu.edu
*Contact Phone 919/513-3387

Comments for Reviewers / Approvers   Show Comments   Attachments
[   ]

[Save for Later]   [Submit for Approval]

NOTES:
TMS indicates a temporary employee performing hourly work subject to FLSA.

The "HR Hiring Proposal" should reflect the approved "HP" number from PeopleAdmin.

Once the HR Hiring Proposal number is entered, the system will attach the hiring application documents supporting the transaction.

Time tracking is required for hourly employees and captured by identifying the unique Time Keeping Location (TKL).

"Standard Hours" should reflect the number of hours worked each pay week.

The TMS employee is responsible for clocking In/Out of the KABA system.

Time is processed biweekly for the hours worked each pay week. Hours exceeding 40 per/wk are paid as overtime.

A Background Check (BGC) is required. Select the BGC items associated with the job and provide the "Candidate Email" in order for the electronic form to be sent to the candidate.

Once the initial job page is completed, click the "Submit for Approval" button at the bottom of the page to advance to the next stage of approval.

ZNP (Visitor No Pay) & UNF (Unpaid Non-Faculty) Job Request Page

Initiate Job Request

Transaction ID: AG00005117 Empl ID: NEW   Name: Empl Class: Access Only - No Pay

Name

Name Prefix: [▾]

*First Name: [   ]

Middle Name: [   ]

*Last Name: [   ]

Name Suffix: [▾]

Employee's Work Location / Address

On Campus: [On Campus ▾]

*Building #: [   ] 🔍

*Room Number: [   ] 🔍

*Campus Box: [   ] 🔍

NCSU Data

*Candidate Email: [   ]

Job

Action: Hire

*Action Reason: ? [▾]

*Effective Date: [02/29/2016]

*Expected Job End Date: [01/29/2017]

*Job Code: [Z547] 🔍   Visitor/No Pay

*Department: [   ] 🔍

*Supervisor ID: [   ] 🔍

Background Check

Please check all of the following that apply:

☐ I want to request a background check on this person

☐ This person could/will be driving an NCSU vehicle

☐ This person could/will be handling money or managing accounts

☐ This person could/will be working with minors (people under the age of 18 years old)

☐ This person will be living in University Housing for more than 3 days

☐ This person will be sponsored on an H-1 Visa

☐ A Commercial Drivers License (CDL) may be used in this job

☐ Please RUSH this Background Check

Comments for Background Check Group (include Working Title from Posting Number, if applicable):

[   ]

*Department [480201] 🔍

*Contact Name [Vance Prince]

*Contact Email [viprince@ncsu.edu]

*Contact Phone [919/515-4292]

Comments for Reviewers / Approvers   Show Comments   Attachments

[   ]

[Save for Later]   [Submit for Approval]

UFC (Unpaid Faculty) JAR Page

Initiate Job Request

Transaction ID: AG0000508 / Empl ID: NEW   Name: Empl Class: Unpaid Faculty

Name

Name Prefix: [▾]
*First Name: [ ]
Middle Name: [ ]
*Last Name: [ ]
Name Suffix: [▾]

Employee's Work Location / Address

On Campus: [On Campus ▾]
*Building #: [ ] 🔍
*Room Number: [ ] 🔍
*Campus Box: [ ] 🔍

NC SU Data

*Candidate Email: [ ]
HR Hiring Proposal: [ ]

Job

Action: Hire
*Action Reason: ? [▾]
*Effective Date: [01/28/2016] 📅
*Expected Job End Date: [ ] 📅

*Job Code: [ ] 🔍
*Department: [ ] 🔍
*Supervisor ID: [ ] 🔍

Appointment Info

Appt Begin Date: [01/28/2016] 📅
*Appt End Date: [ ] 📅
*Anticipated Appt Length: [▾]

Appt Comments: [ ]

Academic Rank

*Academic Rank: [ ] 🔍
Tenure Status: [▾]
*Tenure Type: [▾]
*Academic Home Dept: [ ] 🔍

Tenure Granted Date: [ ] 📅
*Date of Current Rank: [ ] 📅

Named/Distinguished Professorship: [ ]

Background Check

Please check all of the following that apply:
- ☑ I want to request a background check on this person
- ☐ This person could/will be driving an NCSU vehicle
- ☐ This person could/will be handling money or managing accounts
- ☐ This person could/will be working with minors (people under the age of 18 years old)
- ☐ This person will be living in University Housing for more than 3 days
- ☐ This person will be sponsored on an H-1 Visa
- ☐ A Commercial Drivers License (CDL) may be used in this job

- ☐ Please RUSH this Background Check

Comments for Background Check Group (include Working Title from Posting Number, if applicable): [ ]

*Department [515001] 🔍
*Contact Name [Shawn Caton]

*Contact Email [amcaton@ncsu.edu]
*Contact Phone [540/555-7888]

Comments for Reviewers / Approvers   Show Comments   Attachments   Create Offer Letter
[ ]

[Save for Later]   [Submit for Approval]

NOTES:

Unpaid Faculty whose primary assignments are for the purpose of conducting instruction, research, and/or public service, who while not paid by NCSU, need to appear in the system for tracking purposes.

Examples: ROTC faculty, Adjunct faculty

An offer letter should accompany this type of appointment reflecting the work being performed and the duration of time it will take to complete the assignment.

Select any BGC items associated with the work duties. The candidate must complete the BGC form regardless. Provide the "Candidate Email" in order for the electronic form to be sent to the candidate.

*If a BGC **should not be processed**, insert a note in the comment section.*

Once the initial job page is completed, click the "Submit for Approval" button at the bottom of the page to advance to the next stage of approval.

PDC (Post Doc), CHO (CVM House Officer) JAR Page

SHRA (Subject to Human Resources Act) JAR Page

Hire SHRA Employee for AG00005939

NCSU Data

*First Name:	Jane
Middle Name:	
*Last Name:	Doe
Name Suffix:	

*Building #:	
*Room Number:	
*Campus Box:	

*Candidate Email: jane.doe@gmail.com   Time Keeping Location:

*HR Hiring Proposal: HP111111SP   (KABA Punch EE's Only)

Job

Action:	Hire			☐ Override Position Data
*Action Reason: ?	Hire for Regular Employment			
*Effective Date:	03/25/2016	*Job Code:	16785	Building Environmental Tech'n
*Position Number:	00040005	*Department:	447301	Chancellors Res Repair & Renov
Expected Job End Date:		*Location:	292	Facilities-Housekeeping
*Base Compensation:	31,327.000000 Annual	*Reports To Position:	00043452	Wilkins,Leroy
(Full Annualized salary at 1.0 FTE = $31327.00)		*Standard Hours:	40.00 Hrs/Week FTE: 1.000 Total FTE: 1.000	
*Tax Location Code:	NC North Carolina			
☑ Probationary ?		*Recurring Contract	12 Month Assignment	
☐ Encumbrance Override		*Salary Admin Plan:	SVC *Level: 01 Step: 3	
☐ Encumber to Appt End				
☐ Time Limited				

➡ (arrow pointing to Probationary)

Distribution Data

Fiscal Year: 2016   Dept ID: 447301   ☐ Work Against   Position Nbr:

	*Project ID	*Account	Override	*Percent	Amount		
1	224178	51219	☐	100.000	31,327.000	➕	➖
			Totals:	100.000	31,327.00		

Background Check

Please check all of the following that apply:

☑ I want to request a background check on this person
☐ This person could/will be driving an NCSU vehicle
☐ This person could/will be handling money or managing accounts
☐ This person could/will be working with minors (people under the age of 18 years old)
☐ This person will be living in University Housing for more than 3 days
☐ This person will be sponsored on an H-1 Visa
☐ A Commercial Drivers License (CDL) may be used in this job

☐ Please RUSH this Background Check

Comments for Background Check Group (include Working Title from Posting Number, if applicable):

*Department 450201

*Contact Name Vance Prince

*Contact Email viprince@ncsu.edu

*Contact Phone 919/515-4292

Comments for Reviewers / Approvers   Show Comments   Attachments   Create Offer Letter

[Save for Later]   [Submit for Approval]

EHRA (Exempt from Human Resources Act) JAR Page

Activity Menu & Task Progression

The **"Activity Guide"** will always appear when a JAR transaction is initiated or re-opened from the worklist. The example on the *left* illustrates the "Initiate Job Request" is being updated but has not been submitted. The example on the *right* illustrates the "Initiate Job Request" has been submitted and progressed to "Monitor Background Check".
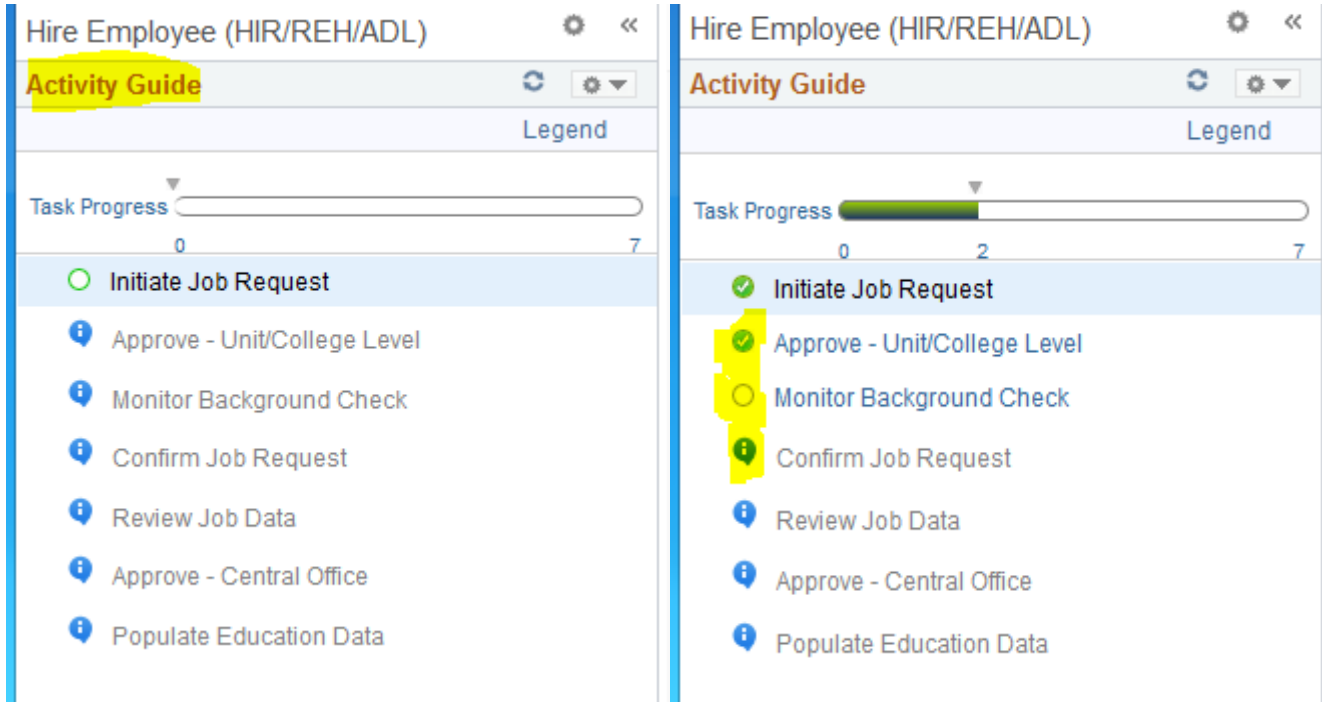
Activity Guide Icons

The blank circle - means the task is in progress or currently being reviewed

The green circle/with a check mark - means the task has been completed
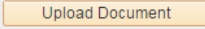
The blue circle - means the task is dependent on the previous task approval (top to bottom)

There is also a "Task Progress" bar at the top on the Activity Guide

Attaching Supporting Documents

Hire SHRA Employee for AG00005071

Onbase Document Type	Upload Document			Required	Received
1 HR Employment References	Upload Document		🗑	☑	☐
2 HR Hiring Proposal		Hiring Proposal 4484384		☑	☑
3 HR Hiring Proposal		Hiring Proposal 4484385		☑	☑
4 HR Offer Letter	Upload Document		🗑	☑	☐
5 HR Patent Agreement	Upload Document		🗑	☑	☐

Back

NOTES:
Transaction approval cannot be achieved for EHRA & SHRA employees unless the supporting documentation has been uploaded.

The HR Hiring Proposal documents will automatically be attached when the corresponding "HR Hiring Proposal" number has been entered.

The "Upload Document" button allows the campus HR rep. to upload supporting documents required by Central HR for transaction approval. Supporting documents can be attached at any time during the transaction progression.

If the hiring dept. uploads any incorrect supporting documents, they can be trashed and reloaded by clicking on the trash can icon.

Worklist Page

Perm Worklist

Non-Perm Worklist

<div style="background-color: yellow;">

NOTES:

*Two separate "**Worklist**" pages exist (Perm & Non-Perm). The worklist is essential in determining overall transaction status.*

Users can simply click the "Search" button using the transaction default setting, (top ex).
OR
Users can select specific search criteria to narrow down the results (bottom ex), then click the search button.

The results will have column names that can be sorted by clicking on the header name.

<u>Current Step</u>: (highlighted above) reflects where the transaction is currently at in the transaction progression.
<u>Action Status</u>: (highlighted above) reflects if the transaction is "In Progress, Complete or Cancelled".

A transaction can be cancelled when the "Trash Can" icon is displayed (not in this ex).
However, if the trash can is not available on the worklist, the transaction can no longer be cancelled without being pushed back to the initiator from College or Central HR.

*To **OPEN** a transaction from the worklist, click on the "Transaction ID#"*

</div>

Promotion / Transfer Page (example for EHRA)

Rapid Rehire Transaction

Rehire Non-Perm Employees

*Employee Class: Temp- Subject to FLSA
*Desired Start Date: 03/05/2016
*Employee ID: 000315518   Kevin Wahl   [Search]   [Clear]

1 row returned in 0.55 seconds

Search Results

Select	Employee ID	Empl #	Name	Employee Classification	Effective Date	Employee Status	Department	Dept Description	Job Code	Job Code Description	Expected Job End Date
1 ☑	000315518	0		Temp- Subject to FLSA	01/06/2016	Terminated	425301	Public Safety Support Services	TN840	Temporary Public Safety Office	

Current Terminated Jobs and Pending Actions

Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Supervisor	Job Code	Job Title	Hours/Week	Hire Date	Job Status	Expected End Dt
1 000315518	0	01/06/2016	Temp- Subject to FLSA	425301	Public Safety Support Services	Ian Kendrick	TN840	Temporary Public Safety Office	4.00	09/29/2001	Terminated	

[ReHire Employee]

NOTES:

Rapid Rehire only works if the employee has been separated from the University within the past 6 months and is returning to the same job, same dept./OUC and the same rate of pay.

Once the "Employee Class, Desired Start Date and Employee ID" are entered at the top, simply click the "Search" button to retrieve the results.

If the system locates the previous employee, it will reflect the latest employment status. In this example, the last job data entry was a separation. If no results are found within the past 6 months, the user will have to use the Hire/Rehire HR Quicklink.

Users could also see pending job actions (not displayed in this ex.) entered by a different dept. attempting to hire the same candidate. If the search results indicate any pending transaction, the user will have to wait until the transaction is approved or cancelled before processing the rapid rehire.

To initiate a rapid rehire, simply check the box in the "Select" column then click the "Rehire Employee" button at the bottom.

The "Initiate Job Request" page will open (below) and populate the demographic and job data information from the previous job.

Rehire Temp- Subject to FLSA for AG00006064

Initiate Job Request

Transaction ID: AG00006064   Empl ID: 000315518   Rcd #: 0   Name: Mr Kevin M. Wahl   Empl Class: Temp- Subject to FLSA

Name

Name Prefix: Mr
*First Name: Kevin
Middle Name:
*Last Name:
Name Suffix:

Employee's Work Location / Address

On Campus: On Campus
*Building #: 238   Public Safety Center
*Room Number: 00122
*Campus Box: 7220   PUBLIC SAFETY

Background Check – Disclosure & Release Acknowledgment

MYPACK HOME	FOR FACULTY & STAFF	MyTAB	HR Dashboard

Favorites ▾ | Main Menu ▾ > Human Resources Systems ▾ > Job Action Requests(JAR) ▾ > Background Check Processing ▾ > BGC Worklist

Background Check Disclosure and Release

Questions about this form? Contact the Background Check Program at (919) 513-2283

Notice
As part of the University's ongoing security efforts and to ensure a safer environment for our students, staff and visitors, University policy requires that a background check be conducted on final candidates for staff and faculty appointments, temporary employees, interns, visiting scholars, individuals who work or volunteer as part of a University-sponsored program or summer camp that is offered to pre-college-age minors, and household members, ages 18 and over, who live with a University employee in University-controlled housing. Current employees who change jobs due to promotion, lateral transfer or reassignment or who assume new duties that warrant a background check may also be subject to background checks. Current employees must notify the University within 5 days of conviction of any criminal offenses and are subject to the verification of the conviction through a background check per NC State University Regulation 05.55.08.

Disclosure
This form, which you should read carefully, has been provided to you because North Carolina State University may obtain information about you for employment purposes through a third party consumer reporting agency. Thus, you may be the subject of a ¿consumer report¿ and/or an ¿investigative consumer report¿ which may include information about your character, general reputation, personal characteristics, credit standing and/or mode of living. The types of information that may be obtained include, but may not be limited to information regarding your credit history, criminal history, social security number verification, motor vehicle records (¿driving records¿), verification of your education or employment history, personal or professional reference checks, licensing or certification checks, etc. You have the right, upon written request made within a reasonable time after receipt of this notice, to request disclosure of the nature and scope of any investigative consumer report. Please be advised that the nature and scope of the most common form of investigative consumer report obtained with regard to applicants for employment is an investigation into your education and/or employment history conducted by Castle Branch, Inc., 1845 Sir Tyler Drive, Wilmington, NC 28405, 888-723-4263, or another outside organization. The scope of this notice and authorization is all-encompassing, however, allowing the University to obtain from any outside organization all manner of consumer reports and investigative consumer reports now and throughout the course of your employment to the extent permitted by law unless permission is revoked in writing. As a result, you should carefully consider whether to exercise your right to request disclosure of the nature and scope of any investigative consumer report.

If you are denied employment as a result of information obtained from your background check, North Carolina State University will provide a copy of A Summary of Your Rights Under the Fair Credit Reporting Act in addition to a copy of any report furnished by a consumer reporting agency during the background check process.

Additional State Law Notices (outside of NC)
New York and Maine applicants or employees only: You have the right to inspect and receive a copy of any investigative consumer report requested by the Company by contacting the consumer reporting agency identified above directly. You may also contact the Company to request the name, address, and telephone number of the nearest unit of the consumer reporting agency designated to handle inquiries, which the Company shall provide within 5 days.

New York applicants or employees only: Upon request, you will be informed whether or not a consumer report was requested by the Company, and if such report was requested, informed of the name and address of the consumer reporting agency that furnished the report. By signing below, you also acknowledge receipt of Article 23-A of the New York Correction Law.

Oregon applicants or employees only: Information describing your rights under federal and Oregon law regarding consumer identity theft protection, the storage and disposal of your credit information, and remedies available to you should you suspect or find that the Company has not maintained secured records is available to you upon request.

Washington State applicants or employees only: You also have the right to request from the consumer reporting agency a written summary of your rights and remedies under the Washington Fair Credit Reporting Act.

California applicants or employees only: By signing below you also acknowledge receipt of the Notice Regarding Background Investigation Pursuant to California Law. Please check this box if you would like to receive a copy of an investigative consumer report or consumer credit report at no charge if one is obtained by the Company whenever you have a right to receive such a copy under California Law.

☐ California Applicant

Minnesota and Oklahoma applicants or employees only: Please check this box if you would like to receive a copy of a consumer report if one is obtained by the Company.

☐ Minnesota/Oklahoma Applicant

[I acknowledge I have read the above information]   [Next]

NOTE:
The background check has been incorporated into the hiring process. It is one of the key approvals in the transaction progression and must be endorsed before moving to the next stage of approval.

The individual selected for employment will have up to 14 days to complete and submit the background check forms. Temporary access will expire after 14 days.

*Employees **should not** start working before the effective hire date in the HR system.*

If an individual needs to be active in the HR system prior to the effective approval date from BGC, an exception will have to be granted by the Central HR - Assoc Vice Chancellor or Designee (AVC).

Background Check – Page 2

NOTE:
Prior state service will have to be verified with the previous state agency before the Benefit service date can be updated in the HR system. This does not apply for temporary work performed during their employment.

HRIM will process the prior state service form after the person has completed all stages of approval.

Background Check – Page 3

MYPACK HOME   FOR FACULTY & STAFF   MyTAB   HR Dashboard

Favorites ▾ | Main Menu ▾   >   Human Resources Systems ▾   >   Job Action Requests(JAR) ▾   >   Background Check Processing ▾   >   BGC Worklist

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Background Check Disclosure and Release

Questions about this form? Contact the Background Check Program at (919) 513-2283

National Residence History

If you have lived in any Country besides the United States since the age of 16, please fill out the section below. (Disregard this section if you were active Military Personnel at the time)

*Country of Birth: [   ] 🔍

First ◀ 1 of 1 ▶ Last

First Name Used	Middle Name Used	Last Name Used	Approx From Date	Approx To Date	Country	
1 [ ]	[ ]	[ ]	[ ] 📅	[ ] 📅	[ ] 🔍	➕ ➖

Past US Addresses Other than NC or Other Names Used - Fill in Below if you ...

1) have been known by ANY OTHER NAME to include legal name change, married, alias, surname, family name, etc.
OR
2) have LIVED OUTSIDE OF North Carolina SINCE AGE OF 16

First ◀ 1 of 1 ▶ Last

First Name Used	Middle Name Used	Last Name Used	City	County	State	Approx From Date	Approx To Date	
1 [ ]	[ ]	[ ]	[ ]	[ ]	[ ] 🔍	[ ] 📅	[ ] 📅	➕ ➖

Education

*Have you completed High School or do you have a GED?   ○ Yes   ○ No

Please enter all education information for degrees completed after High School

First ◀ 1 of 1 ▶ Last

Degree	Name of College/University	Country	State	City/Province	Month Earned	Year Earned	Major Field of Study	
1 [ ] 🔍	[ ]	[ ] 🔍	[ ] 🔍	[ ]	[ ]	[ ]	[ ]	➕ ➖

Criminal History

Have you ever been convicted of any unlawful offense other than a minor traffic violation?   ○ Yes   ○ No

This includes DUI/DWI, worthless checks, violations of local ordinances or state statutes that resulted in a fine or incarceration, misdemeanors, felonies, etc. Guilty verdicts, guilty pleas, prayers for judgment (PJC), and "no-contest" pleas must be included unless the convictions have been expunged from your record.

If YES, list below the date(s), county(ies), state(s) and specific crime(s). Use continuation sheet if necessary. A previous conviction will not automatically disqualify you from employment. However, failure to provide complete and accurate information is considered "falsification," and your application may be removed from consideration. If falsification occurs and you are currently employed, you may be subject to disciplinary action up to and including termination of employment. If you are unsure of your conviction history please verify prior to answering.

Please note: Pending criminal charges may delay the University's employment decision until after a verdict in the case has been rendered.

First ◀ 1 of 1 ▶ Last

Approx Date	County	State	Conviction	Comment	
1 [ ] 📅	[ ]	[ ] 🔍	[ ]	[ ]	➕ ➖

Authorization to Conduct Background Check

I hereby certify that all information I have provided on this form, as well as any additional continuation sheet is true and complete. By signing below, I authorize the University's verification of any information contained in both this form and my employment application. I authorize the University to obtain "consumer reports" through third-parties in order to verify this information and thus authorize any law enforcement agency, administrator, state or federal agency, court, institution, school or university, information service bureau, employer, or insurance company to furnish any and all background information requested by the University or outside organization acting on behalf of the University. I understand that by admitting to a conviction for any unlawful offense, I will not be disqualified automatically from consideration for employment. I understand that false or misleading information or documentation, or an omission or failure to include all relevant information, may result in rejection of my application, action up to and including termination if hired, and/or criminal prosecution. If hired, I understand the University complies with State law and is required to terminate my employment if false or misleading information is given in order to meet the requirements for the position involved.

[Sign section]   Signature: Date:

[Previous]   [Submit to NC State]

Modify existing JOB (Students, Temps and No Pays)

Modify Job Search Page

Job Action Request - Modify

Employee ID: [   ] 🔍

Employee Class: [Student Worker ▼]
Temp- Exempt from FLSA
Temp- Subject to FLSA
Unpaid Faculty
Unpaid Non-Faculty
Visitor No Pay

[Search]   [Clear]

Current and Future Jobs

Emplid	Empl Rcd	Name	Empl Class	Deptid	Job Code	Supervisor	Hours per week	Empl Status	Expected End Date	Select
200014864	0	Amy Bryant	STW	110901	NCSU Student worker	Jane Jones	10	Active	12/15/2014	☐
200014864	1	Amy Bryant	TMS	110902	Office Support	Jane Jones	8	Active	5/15/2014	☑
000013695	2	Todd Bryant	TME	110901	Lab Assistant	Jane Jones	20	Active	10/15/2014	☐

[Modify Job information]

Incorrect

Modify Non-Perm Employees

*Employee Class: [Student Workers ▼]   Department: [   ] 🔍
*Effective Date: [12/01/2015] 📅   First Name: [   ]
Employee ID: [000000809] 🔍 Kathleen Reilly   Last Name: [   ]

[Search]   [Clear]

Search Results   Personalize | Find | | 🗗 | 📊   First ◄ 1 of 1 ► Last

	Select	Employee ID	Empl #	Name	Employee Classification	Effective Date	Employee Status	Department	Dept Description	Job Code	Job Code Description	Expected Job End Date
1	☐		0			02/09/2016						

[Modify Job Information]

Correct

Modify Non-Perm Employees

*Employee Class: [Temp- Subject to FLSA ▼]   Department: [   ] 🔍
*Effective Date: [12/01/2015] 📅   First Name: [   ]
Employee ID: [000000809] 🔍 Kathleen Reilly   Last Name: [   ]

[Search]   [Clear]

Search Results   Personalize | Find | | 🗗 | 📊   First ◄ 1 of 1 ► Last

	Select	Employee ID	Empl #	Name	Employee Classification	Effective Date	Employee Status	Department	Dept Description	Job Code	Job Code Description	Expected Job End Date
1	☐	000000809	0	Kathleen Reilly	Temp- Subject to FLSA	08/17/2015	Active	244030	Student Health Services	TN710	Temporary Skilled Craftsperson	07/17/2016

[Modify Job Information]

NOTES:
Job modifications can only be performed on "ACTIVE" employees.

"Red Text" will appear if the data provided in the required fields is "Incorrect".

Once the "Correct" data is provided, the user can locate the employee, check the select box and click on the "Modify Job Information" to advance to the next page.

Modify Job Page

Modify Temp- Subject to FLSA for AG00006067

Transaction ID: AG00006067 Empl ID: 001115422 Rcd #: 0 Name: Joseph Temp   Empl Class: Temp- Subject to FLSA

*Make Changes effective on this date: 03/01/2016

Current Information

Department:	515001	Enterprise Application Svcs
Location:	394	Enterprise Application Svcs
Supervisor ID:	000973185	Soifer, Richard
Job Code:	TN500	Temp Admin / Offc Suppt Staff
Expected Job End Date:	05/31/2016	
Standard Hours:	17.00	
FTE:	0.425	
Annual Salary:	10608.000	
Monthly:	884.000	
Bi-Weekly:	408.000	
Hourly:	12.000000	
Annual Rate if 1.0 FTE:	24960.000	
Salary Change Amount:		
Salary Change Percent:		
Time Keeping Location:	141	
Encumbrance Override:	N	
Encumber to Appt End:	N	

New Information

Department:	515001	Enterprise Application Svcs
*Location:	394	Enterprise Application Svcs
*Supervisor ID:	000973185	Soifer, Richard
*Job Code:	TN500	Temp Admin / Offc Suppt Staff
*Expected Job End Date:	05/31/2016	
*Standard Hours:	17.00	
FTE:	0.425	Total FTE: 0.430000
Annual Salary:	10608.00	
Monthly:	884.00	
Bi-Weekly:	408.000	
*Hourly:	12.00	
Annual Rate if 1.0 FTE	24960.000	
Salary Change Amount:	0.000000	
Salary Change Percent:	0.000	
*Time Keeping Location:	141	OIT EAS
Encumbrance Override:	☐	
Encumber to Appt End:	☐	

Distribution as of Effdt above

Personalize | Find | | | First ◄ 1 of 1 ► Last

Effective Date	Department	Project/Grant	Account	Distrb %
01/30/2016	515001	221700	51410	100.000

Comments for Reviewers / Approvers   Show Comments

[Submit for Approval]   [Cancel]

NOTE:

The job modification page above reflects the "Current (job) Information" displayed on the left side of the page.

The user could make modifications under the "New Information" column on the right side of the page.

Once the new information has been updated, click the "Submit for Approval" button to process the transaction.

Employee Separation (Students, Temps and No Pays)

To separate an active student and/or temporary worker first select the Employee Class, Effective Date and Employee ID. Click the "Search"button to retrieve the results.

Check the box under the "Select" column followed by clicking on the "Process Separation" button.

NOTES:
Select the appropriate separation option from the drop-down list.

Click the "Submit for Approval" button to process the transaction.

This concludes the 9.2 HR Dashboard & JAR Overview. If you have any questions regarding the JAR process, contact your HRIM Specialist.