The contents of this manual are intended for use by Danforth Campus department representatives. For assistance with HRMS or TAM on the School of Medicine campus, please contact the School of Medicine Department of Human Resources at 362-7196 or visit their website at http://medschoolhr.wustl.edu.

This manual will be updated and reposted on the Danforth Campus HR website at http://hr.wustl.edu as necessary. Departments are encouraged to access the site and review the document often to ensure that they are utilizing the most current version.

For HRMS assistance on the Danforth Campus, please contact Georgiann Kegel at 935-5949 or Bethanie Becker at 935-7890. For TAM assistance on the Danforth Campus, please contact Jennifer Huck at 935-8641.
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## ACTIVATING AN INDIVIDUAL’S RECORD

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## ENTERING TEMPORARY ABSENCES AND RETIREMENT

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SECTION QUICKSTART GUIDE

ACTIVATING AN INDIVIDUAL’S RECORD

Entering a Hire

- Log into HRMS.
- Click on “Job and Compensation,” then “Hire Emp/Add NonEmp/Add ConJob.”
- Enter requested data and click “Hire New Employee.”
- Enter relevant data and action/reason codes into hire template. Click “Save and Submit.”
- When hire screen opens, verify all data on all tabs.
- Set ARRA indicator appropriately.
- Click on “Sources” and enter the appropriate information in provided fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
- Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Hire with Academic Year Pay

- Follow instructions for “Entering a Hire.”
- Click on “Job and Compensation,” then “Academic Year Pay” under “Workflow Routing Inquiry.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data. Click “Save.”
- Select the “Approval” tab, enter any necessary comments, then click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering Additional Pay

- Log into HRMS.
- Click on “Job and Compensation,” then “Additional Pay” under “Workflow Routing Inquiry.”
- Enter employee data and search to locate employee record.
- Enter appropriate earnings code.
- Enter an effective date of the first day of the corresponding pay period. Enter an end date of the first day after additional pay will end.
- Enter amount received per pay period in the “Earnings” field.
- Confirm “OK to Pay” is checked.
- Click on “Sources” and enter the appropriate information in provided fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
- Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.
Entering a Rehire/Return to Work

- Log into HRMS.
- Click on “Job and Compensation,” then “Rehire/Return Request.”
- Enter relevant data.
- Click “Request re-hire,” then “Save.”
- Once approved, select link to employee/non-employee record in user worklist.
- Add a new row.
- Enter relevant data and action/reason codes into hire template.
- Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- Click on “Personal Information,” then “Personal Data.” Move through all tabs and verify the data on each.
- Click “Save” after making any changes.

Initiating the Electronic I-9

- Once the new hire has completed his/her portion of the I-9, log into HRMS and access the I9 Department Verification link in the worklist.
- Verify required fields are completed.
- Complete remaining fields as applicable.
- Click “Accept” to route information to HR.

Entering a Return from Short Work Break

- Log into HRMS.
- Click on “Job & Compensation,” then “Job Data.”
- Enter student data and search to locate student record.
- Add a new row.
- Enter relevant data and action/reason codes.
- Move through all tabs and verify the data on each. Click “Save.”
- Click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Return from Leave of Absence

- Log into HRMS.
- Click on “Job & Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes into hire template.
- Move through all tabs and verify the data on each. Click “Save.”
- Click “Approve One” or “Approve” as appropriate based on departmental workflow.
Entering a Non-Employee Role

- Log into HRMS.
- Click on “Job and Compensation,” then “Hire Emp/Add NonEmp/Add ConJob.”
- Enter requested data and click “Add New Non-Employee.”
- Enter relevant data and action/reason codes into hire template.
- When hire screen opens, verify all data on all tabs.
- Set ARRA indicator appropriately.
- Click on “Sources” and enter the appropriate information in provided fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
- Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering an Additional Employee Role

- Log into HRMS.
- Click on “Job and Compensation,” then “Hire Emp/Add NonEmp/Add ConJob.”
- Enter employee data and search to locate employee record.
- Click “Add Concurrent Job.”
- When hire screen opens, verify all data on all tabs.
- Click “Save,” then “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Temporary Employee or Retiree Role

- Log into HRMS.
- Click on “Job and Compensation,” then “Hire Emp/Add NonEmp/Add ConJob.”
- Enter requested data and click “Hire New Employee.”
- Enter relevant data and action/reason codes into hire template. Click “Save and Submit.”
- When hire screen opens, verify all data on all tabs.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.

Initiating and Completing a Transfer

**Originating Department:**

- Log into HRMS.
- Click on “Job & Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter an effective date of one day after the employee’s last day worked in the department.
- Enter relevant data and action/reason codes.
- Enter new department number and location.
- Click “Approval” tab and enter “New department responsible for editing all tabs.” Click “Save.”
• When paysheet is available, select “Paysheet – Job Dept,” enter department number, and search to locate employee record.
• Enter “VCA” in the “Earnings” field and the positive number of vacation hours being transferred to the new department in the “Hours” field or the positive corresponding dollar amount in the “Amount” field as appropriate.
• Click “Save” and close the paysheet window.

New Department:
• Log into HRMS.
• Access the transferring employee’s job record.
• Review all tabs, verify information on each, and make any necessary changes.
• Click “Approve One” or “Approve” as appropriate based on departmental workflow.
• When paysheet is available, select “Paysheet – Job Dept,” enter department number, and search to locate employee record.
• Enter “VCA” in the “Earnings” field and the negative number of vacation hours being transferred in the “Hours” field or the negative corresponding dollar amount in the “Amount” field as appropriate.
• Click “Save” and close the paysheet window.
SECTION QUICKSTART GUIDE
INACTIVATING AN INDIVIDUAL’S RECORD

Entering a Termination

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes appropriate for a termination. Enter an effective date of one day after the employee’s last day worked. Click “Save.”
- Select the “Approval” tab, enter any necessary comments, then click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Completion

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes appropriate for a completion. Enter an effective date of the date the role is completed. Click “Save.”
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Death

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes appropriate for a death. Enter an effective date of one day after the employee’s death. Click “Save.”
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
SECTION QUICKSTART GUIDE
ENTERING TEMPORARY ABSENCES AND RETIREMENT

Placing a Student Employee on Short Work Break

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes appropriate for a short work break. Enter an effective date of one day after the employee’s last day worked.
- Move through all tabs and verify the information on each. Click “Save.”
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Leave of Absence

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes appropriate for a leave of absence. Click “Save.”
- Select the “Approval” tab, enter any necessary comments, then click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Sabbatical

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes appropriate for a sabbatical. Enter an effective date of the date that the sabbatical will begin.
- Enter the anticipated date of the employee’s return to work in the “Expected Return Date” field. Click “Save.”
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.

Entering a Retirement

- Log into HRMS.
- Click on “Job and Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
• Enter relevant data and action/reason codes appropriate for a retirement. Enter an effective date of one day after the employee’s last day worked. Click “Save.”
• On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
SECTION QUICKSTART GUIDE
ENTERING FACULTY RECORDS

Entering a Faculty Title

- Log into HRMS.
- Click on “Faculty Data,” then “Faculty Title Summary.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and the same effective date as that shown on the new hire job record.
- Select the “Letter Title” tab and enter exact title wording.
- Select the “Dept Info” tab and verify data.
- Click “Save.”

Entering a Faculty Title in the Absence of a Corresponding Job Record

- Log into HRMS.
- Click on “Faculty Data,” then “Faculty Title Summary.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and an effective date of the date the title will take effect.
- Select the “Letter Title” tab and enter exact title wording.
- Select the “Dept Info” tab and verify data.
- Click “Save.”
SECTION QUICKSTART GUIDE
USING SYSTEM MODULES

Using the Time & Labor Module

- Log into HRMS.
- Click on “Manager Self Service,” then “Time Management” and “Approved Reported Time.”
- Click on employee’s name and review reported time.
- If data is accurate, click “Approve Timesheet.” If data is inaccurate, return timesheet to employee with comments or correct the data.

Using the Talent Acquisition Manager (TAM)

- Contact the Employment Office.
SECTION QUICKSTART GUIDE
MAINTAINING ACCURATE DATA

Primary and Secondary Jobs

- Log into HRMS.
- Click on “Job & Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes into hire template. Enter an effective date of one day after the last day worked. Click “Save.”
- Click “Approve One” or “Approve” as appropriate based on departmental workflow.

Name Changes

- Submit a copy of the employee’s social security card to the Office of Human Resources.

Other Data Changes

- Log into HRMS.
- Click on “Job & Compensation,” then “Job Data.”
- Enter employee data and search to locate employee record.
- Add a new row.
- Enter relevant data and action/reason codes into hire template. Enter an effective date of the date of the data change. Click “Save.”
- Click “Approve One” or “Approve” as appropriate based on departmental workflow.

Monitoring “No Pay for 90 Days”

- Run one of three public queries to identify and terminate affected individuals:
  “WP_DP_ACTIVE_NO_PAYCHECK_OTHER,” “WP_DP_ACTIVE_NO_PAYCHECK_SDNT,” and/or “WP_DP_ACTIVE_NO_PAY_FOR_X_DAYS.”

Monitoring Duration of Short Work Breaks

- Run “WP_DP_LOA_SWB_9MOS” query to identify and terminate affected individuals.

Entering Leave Balance Adjustments

- Log into HRMS.
- Click on “Manager Self Service,” then “Time Management” and “Leave Balance Adjustments.”
- Enter employee data and search to locate employee record.
- Select appropriate adjustment type.
- Enter the date adjustment should take effect.
- Enter amount of adjustment.
• Enter explanation of adjustment.
• Click “Save.”
ACTIVATING AN INDIVIDUAL’S RECORD

Entering a Hire

In most cases, new staff members should be hired through the Talent Acquisition Manager (TAM) system, which interfaces directly with HRMS. For assistance with the TAM hire process, supervisors should consult the Employment Office. The following steps outline the basic hiring transactions as conducted directly through the HRMS module, utilizing the traditional hard copy or printed “fillable” Personal Identification Form (PIF) as available on the Human Resources website.

A new hire is defined as an individual who has not previously been employed by Washington University in a staff, faculty, or student capacity.

- Log into HRMS using your WUSTL Key.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Hire Emp/Add NonEmp/Add ConJob.”
- Enter the new hire’s social security number as provided by him/her on the PIF form. Select “Emp” from the “Person Type” dropdown menu and click “Search.”
- Click the blue “Hire New Employee” link that appears under the “Search” button.
- Enter the effective date of the hire in the “Job Effective Date” field. Ensure that the “Employment” reason is selected in the “Reason Code” dropdown menu. Click “Next.”
- Complete the fields provided in the hire template. Required fields are noted with an asterisk (*). Click “Next” when finished.
  - Do not use all caps when entering hire data.
  - Within the hire template, phone numbers should be entered in XXX/XXX-XXXX format.
  - Bypass the grayed out “Original I-9 Date” and “Reverified I-9 Date” fields, as they are provided for HR use only.
  - Enter the appropriate number in the “Check Delivery No” field, making sure to verify the correct campus box with the hiring department if applicable.
- Complete the remaining fields provided on the second page of the hire template. Required fields are noted with an asterisk (*). Click “Save and Submit” when finished.
  - Select “HILBU – Danforth Campus” from the dropdown menu in the “Business Unit” field.
  - Enter the appropriate annual rate of pay in the “Comp Rate” field under “Job Compensation – Pay Components.”
  - **NOTE:** The warning, “An action of hire, rehire, additional role or transfer for a staff role requires a job requisition number. Press OK to Proceed. Press Cancel to enter data.” refers to the job opening number assigned by the TAM system. Verify that the appropriate information has been entered into the hire template.
- When the hire screen opens, move through all tabs and verify the data on each. On the “Additional Job Data” tab, select the appropriate indicator in the “New ARRA Related Position?” dropdown menu.
- Click on the blue “Sources” link to open the Sources window and enter the appropriate information in the provided “Earnings” fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
- Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.
• The entry will be routed to HR for review and approval.

Helpful Hint: After entering a new hire’s social security number and person type and clicking on “Search” on the “Hire Emp/Add NonEmp/Add ConJob” screen, HRMS should not find the social security number in its records. If the system indicates that the social security number is on record, the individual has likely been previously employed by the University. In that case, the individual should be classified as a rehire, and the instructions under “entering a rehire” should be used to activate his/her HRMS record.

Helpful Hint: The electronic PIF form is available to new employees who apply and are hired through the TAM system; however, departments should contact the Office of Human Resources prior to utilizing the feature. For assistance with the TAM system, contact the Employment Office.

Entering a Hire with Academic Year Pay

Academic year pay is used when an individual works an appointment with a non-12-month schedule. Though similar to the procedures for entering a 12-month hire, additional data entry and approval are required to document an academic year pay setup within HRMS.

Step 1:

• Log into HRMS using your WUSTL Key.
• Click on “Job and Compensation” in the left-hand navigation bar. Select “Hire Emp/Add NonEmp/Add ConJob.”
• Enter the new hire’s social security number as provided by him/her on the PIF form. Select “Emp” from the “Person Type” dropdown menu and click “Search.”
• Click the blue “Hire New Employee” link that appears under the “Search” button.
• Enter the effective date of the hire in the “Job Effective Date” field. Ensure that the “Employment” reason is selected in the “Reason Code” dropdown menu. Click “Next.”
• Complete the fields provided in the hire template. Required fields are noted with an asterisk (*). Click “Next” when finished.
  o Do not use all caps when entering hire data.
  o Within the hire template, phone numbers should be entered in XXX/XXX-XXXX format.
  o Bypass the grayed out “Original I-9 Date” and “Reverified I-9 Date” fields, as they are provided for HR use only.
  o Enter the appropriate number in the “Check Delivery No” field, making sure to verify the correct campus box with the hiring department if applicable.
• Complete the remaining fields provided on the second page of the hire template. Required fields are noted with an asterisk (*). Click “Save and Submit” when finished.
  o Select “HILBU – Danforth Campus” from the dropdown menu in the “Business Unit” field.
  o Enter the appropriate annual rate of pay in the “Comp Rate” field under “Job Compensation – Pay Components.”
  o In the “Frequency” field, select “C” to denote academic year pay.
NOTE: The warning, “An action of hire, rehire, additional role or transfer for a staff role requires a job requisition number. Press OK to Proceed. Press Cancel to enter data” refers to the job opening number assigned by the TAM system. Verify that the appropriate information has been entered into the hire template.

- When the hire screen opens, move through all tabs and verify the data on each. On the “Additional Job Data” tab, select the appropriate indicator in the “New ARRA Related Position?” dropdown menu.
- Click on the blue “Sources” link to open the Sources window and enter the appropriate information in the provided “Earnings” fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
- Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.

Step 2:

- Click on “Job and Compensation” in the left-hand navigation bar. Select the blue “Academic Year Pay” link under “Workflow Routing Inquiry.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- Click on the blue “+” in the upper right-hand corner of the provided “Aca Yr Pay” box to add a new row.
- Enter the appointment start date in the “Effective Date” field.
- Select the appropriate option from the “Academic Year Pay Type” dropdown menu. If the appointment’s planned schedule does not match any provided options, select “Paid Over ‘X’ Months.”
- Select the appropriate option from the “Payment Term” dropdown menu.
- In the “Pay Period Hours” field, confirm that 162.5 is shown for a full-time employee who will be paid over 12 months. If the employee will work less than 37.5 standard hours (1 FTE) per week, use the appropriate FTE percentage to calculate and verify the corresponding pay period hours.
- Enter the start and end dates for the appointment and the start and end dates for payment, respectively, in the “Term Begin/Term End” and “Payment Begin/Payment End” fields.
- Click “Save.” Select the “Approval” tab, enter any necessary comments, then click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

Helpful Hint: HRMS will not automatically prompt the user to complete the Academic Year Pay screens. If academic year pay applies, ensure that the screens are completed prior to routing to HR for review and approval.

Entering Additional Pay

Additional pay is used to schedule payment of bonuses, lecture fees, or other non-salary pay. Within HRMS, additional pay is entered in terms of pay periods.
• Log into HRMS.
• Click on “Job and Compensation” in the left-hand navigation bar, followed by the blue “Additional Pay” link under “Workflow Routing Inquiry.”
• Enter known information into the provided fields as it pertains to the employee receiving the payment. Click “Search.”
• Click the magnifying glass next to the “Earnings Code” field and select “BON” (Bonus/Incentive), “HON” (Honorarium), “LEC” (Lecture Fees), “PRO” (Project Pay), or “VCA” (Vacation Accrual Transfer) as appropriate. If another earnings code appears to apply, contact the Office of Human Resources for assistance.
• Enter the date of the first day of the pay period in which the additional pay will be paid in the “Effective Date” field.
• In the “End Date” field, enter the date of the first day of the next pay period in which no payment will be made (e.g., if monthly payments will be made in July, August, and September 2011, enter 10/1/11 as the end date).
• Enter the amount of additional pay received per pay period in the “Earnings” box (e.g., if $3000 will be paid in monthly $1000 payments over a three-month period, enter $1000 in the “Earnings” box).
  o NOTE: Bypass the grayed out “Goal Amount” and “Goal Balance” fields.
• Verify that the “OK to Pay” box is checked.
• Click on the blue “Sources” link to open the Sources window and enter the appropriate information in the provided “Earnings” fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
• Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.
• The entry will be routed to HR for review and approval.

**Helpful Hint:** Sources for additional pay must match the selected earnings code. For assistance with sourcing of additional pay, contact your departmental payroll representative or the Office of Human Resources.

**Entering a Rehire/Return to Work**

A rehire is defined as any individual who was previously employed by Washington University in a staff, faculty, or student capacity and is returning to work at the University in any of these roles. For non-employees in this situation, the status of “return to work” is used. Rehire/return entry requires HR approval mid-process.

**Step 1:**

• Log into HRMS.
• Click on “Job and Compensation” in the left-hand navigation bar. Select “Rehire/Return Request.”
• Enter known information into the provided fields as it pertains to the rehire.
• Enter the new six-digit department number in the “Re-hire into department” field.
• Click “Request re-hire,” followed by “Save.” The entry will be routed to HR for review and approval.
Step 2:

- Log into HRMS and click on “Worklist” in the left-hand navigation bar. Select “Worklist.” Once approved by HR, the rehire record will appear in the originator’s worklist with a notation of “ReHire Approved” in the “Work Item” column.
- Click the corresponding blue link on the right-hand side of the screen in the “Link” column.
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of rehire in the “Effective Date” field. Select “Rehire” or “Return Non-Employee” as applicable from the dropdown menu in the “Action” field.
- If the rehire was last employed by the University within the previous 30 days, select “Returned Within 30 Days” from the dropdown menu in the “Reason” field. If the rehire was last employed by the University more than 30 days prior to the rehire date, select “Returned After 30 Days” from the dropdown menu. If the individual returning to work is a non-employee, select “Return Former NEE Frm History.” Consult with the Office of Human Resources before proceeding if another reason code appears to apply.
- Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- Click on “Personal Information” in the left-hand navigation bar. Select “Personal Data.” Move through all tabs and verify the data on each.
  - On the “Additional Personal Data” tab, verify that the current number appears in the “Check Delivery No” field. Click “Save” after making any changes.

**Helpful Hint:** If a rehire is returning to work on the Danforth Campus after a break of 30 or more days, he/she will be required to complete the I-9. For assistance or questions concerning the I-9 employment verification process, contact the Office of Human Resources.

**Initiating the Electronic I-9**

In 2005, the Immigration and Nationality Act requiring U.S. employers to complete and store I-9 forms for newly hired employees was modified to allow employers to manage I-9 forms electronically. HRMS enables the electronic collection, storage, and maintenance of all I-9 information for Washington University employees in compliance with federal regulations.

As with the paper employment verification process, completion of the electronic I-9 document is a two-step process, requiring input from both the employee and the hiring department.

**Step 1**

*New Hire:*

- Once the job record has been entered, the new hire will receive an email notification to log into HRMS and complete the I-9.
Step 2

**Department I-9 Administrator:**

- Once the new hire’s portion of the I-9 has been completed, access the pending I-9 document by clicking on the link provided in the email notification and logging into HRMS or by logging into HRMS and then clicking on “Worklist,” followed by “Worklist Summary” and the corresponding “I9 Department Verification” link. If applicable, click the link provided in the far-right hand “Link” column to access the Employer Review and Verification page.
- Verify that the employee has completed all required fields and that optional fields are completed where applicable.
  - The “Citizenship and Employment Authorization” section should correctly display the radio button selected by the employee.
  - If the employee selected the “Lawful permanent resident” option, the “Alien #” field should be completed and the employee’s information displayed.
  - If the employee selected “Alien authorized to work” option, the “Alien #” or “Admission #” and “Date authorized to work until” fields should be completed and the employee’s information displayed.
- Complete remaining fields as applicable. Click “Accept” to route information to HR.

**Helpful Hint:** Departments are strongly urged to contact the Office of Human Resources with all questions concerning citizenship documentation or completion of the electronic I-9. Specific federal regulations govern the work eligibility verification process and failure to adhere to these guidelines may result in a variety of consequences for both the department and the University.

**Helpful Hint:** Federal regulations stipulate that employers must verify the work eligibility of a new employee within three days of the employee’s start/rehire date. If the I-9 is not completed within this timeframe, HRMS requires the department I-9 administrator to provide written justification for the delay. Additionally, if acceptable documentation of work eligibility is not presented to the department I-9 administrator within three days of hire, the employee should not be permitted to work.

**Helpful Hint:** On the Danforth Campus, a new I-9 is not required for individuals returning to work at the University within 30 days of prior termination. In this situation, contact the Office of Human Resources for assistance.

**Helpful Hint:** For questions concerning work eligibility documentation and associated paperwork for non-U.S. citizens, contact the Office of International Students and Scholars at 5-5910.
Entering a Return from Short Work Break

A short work break comprises a period of time when a student employee does not work. When the student employee returns to work, he/she must be returned from the short work break within HRMS in order to reinitiate the creation of his/her paysheets for the corresponding position.

Refer to “Temporary Absences and Retirement: Placing a Student Employee on Short Work Break” for instructions regarding the entry of this type of leave.

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.” Enter known information into the provided fields as it pertains to the student. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of the student’s return to work in the “Effective Date” field. Select “Return from Work Break” from the dropdown menu in the “Action” field.
- Select “Semester Sched (No PayRte Chge),” “Semester Sched (Pay Rate Chge),” “Summer Break (No Pay Rate Chg),” or “Summer Break (Pay Rate Chge)” as appropriate from the dropdown menu in the “Reason” field. Consult with the Office of Human Resources before proceeding if another reason code appears to apply.
  - **NOTE:** The information on all subsequent tabs must confirm the reason selected; therefore, it is necessary to verify that a pay rate change is or is not taking place before selecting the corresponding reason.
- Move through all tabs and verify the information on each.
  - Confirm that 0 standard hours and 0 FTE are shown on the “Job Information” tab.
  - Confirm that the correct compensation rate is shown on the “Compensation” tab.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

**Helpful Hint:** Short work breaks apply only to students. If a staff or faculty employee works a nine-month or other non-year-round appointment, he/she must be placed on a leave of absence during the inactive months, using a reason of “semester schedule” or other appropriate option. Staff and faculty employees should not be placed on short work breaks.

**Helpful Hint:** A short work break may not exceed nine months in duration. If a student employee will not be working for a period of longer than nine months, he/she should be terminated and rehired upon returning to work. Consult the Office of Human Resources for assistance in this situation.

**Helpful Hint:** A student employee must be returned from short work break in HRMS before departments may transfer him/her between their respective areas. For assistance in this situation, contact the Office of Human Resources.
Entering a Return from Leave of Absence

A leave of absence refers to periods when a staff or faculty employee is physically absent from the University, but remains in active employment status. Often, a leave of absence is anticipated, such as in the case of a faculty sabbatical or a nine-month or other non-year-round appointment. Other leaves, such as those governed by the Family and Medical Leave Act (FMLA), may or may not be pre-planned. An individual placed on a leave of absence must be returned from leave in order to reinitiate the creation of his/her paysheets for the corresponding position.

Refer to “Inactivating an Individual’s Record: Placing an Employee on Leave of Absence” for instructions regarding the entry of this type of leave.

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.” Enter known information into the provided fields as it pertains to the employee. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of the employee’s return to work in the “Effective Date” field. Select “Return from Leave” from the dropdown menu in the “Action” field.
- Select “Different Job (Pay Rate Chge),” “Same Job (Pay Rate Chge),” “To Diff Job (No Pay Rate Chge),” or “To Same Job (No Pay Rate Chge)” as appropriate from the dropdown menu in the “Reason” field.
  - **NOTE:** The information on all subsequent tabs must confirm the reason selected; therefore, it is necessary to verify that a pay rate and/or job change is or is not taking place before selecting the corresponding reason.
- Move through all tabs and verify the information on each.
  - Confirm that the correct standard hours and FTE are shown on the “Job Information” tab.
  - Confirm that the correct compensation rate is shown on the “Compensation” tab.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

**Helpful Hint:** Leaves of absence apply only to staff and faculty employees. Students should not be placed on leaves of absence; similarly, staff and faculty employees should not be placed on short work breaks. For assistance or questions, consult the Office of Human Resources.

Entering a Non-Employee Role

A non-employee is defined as an individual who receives compensation in the form of a stipend. Typically, graduate students are non-employees. Due to the type of roles classified as non-employees, individuals in these positions are not hired through the TAM system.

The following instructions outline the basic transactions for adding a first-time non-employee role. If a non-employee role previously existed and was terminated, the new role should be entered on the same
row as the original non-employee position to avoid excessive entries in HRMS. Refer to “Entering a Rehire/Return to Work” for instructions.

- Log into HRMS.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Hire Emp/Add NonEmp/Add ConJob.”
- Enter the new hire’s social security number as provided by him/her on the PIF form. Select “Non-Emp” from the “Person Type” dropdown menu and click “Search.”
- Click the blue “Add New Non-Employee” link that appears under the “Clear” button.
- Enter the effective date of the hire in the “Job Effective Date” field. Ensure that the “Stipend Payments” reason is selected in the “Reason Code” dropdown menu. Click “Next.”
- Complete the fields provided in the hire template. Required fields are noted with an asterisk (*). Click “Next” when finished.
  - Do not use all caps when entering hire data.
  - Within the hire template, phone numbers should be entered in XXX/XXX-XXXX format.
  - Bypass the grayed out “Original I-9 Date” and “Reverified I-9 Date” fields, as they are provided for HR use only.
  - Enter the appropriate number in the “Check Delivery No” field, making sure to verify the correct campus box with the hiring department if applicable.
- Complete the remaining fields provided on the second page of the hire template. Required fields are noted with an asterisk (*). Click “Save and Submit” when finished.
  - Select “HILBU – Danforth Campus” from the dropdown menu in the “Business Unit” field.
  - Enter the appropriate annual rate of pay in the “Comp Rate” field under “Job Compensation – Pay Components.”
- When the hire screen opens, move through all tabs and verify the data on each. On the “Additional Job Data” tab, select the appropriate indicator in the “New ARRA Related Position?” dropdown menu.
- Click on the blue “Sources” link to open the Sources window and enter the appropriate information in the provided “Earnings” fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
- Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

**Helpful Hint:** In certain cases, an individual may be classified as a non-employee for reasons other than graduate study and associated stipend payments. If a reason code other than “Stipend Payments” appears to apply, contact the Office of Human Resources for assistance.

**Entering an Additional Employee Role**

An additional role is defined as a secondary position that is assumed in addition to an existing primary position. The following instructions outline the basic transactions for adding a first-time additional role.
If a secondary role previously existed and was terminated, the new additional role should be entered on the same row as the original secondary position to avoid excessive entries in HRMS. Refer to “Entering a Rehire/Return to Work” for instructions.

- Log into HRMS.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Hire Emp/Add NonEmp/Add ConJob.”
- Enter the new hire’s social security number as provided by him/her on the PIF form. Select “Emp” from the “Person Type” dropdown menu and click “Search.”
- Click the corresponding blue “Add Concurrent Job” link that appears on the left-hand side of the screen.
  - **NOTE:** Any individual assuming an additional role should already have an active record in HRMS. If the employee has an existing primary position on record, HRMS will display a warning box that reads “This person has Active Employee Record. Use ‘Add Concurrent Job’”. If this message is not displayed, the individual is likely not an active employee. Refer to “Entering a Hire” for instructions.
- When presented with the hire screen, move through all tabs and enter relevant data regarding the additional role in the appropriate fields.
  - Confirm that the correct standard hours and FTE are shown on the “Job Information” tab.
  - Confirm that the correct compensation rate is shown on the “Compensation” tab.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

**Helpful Hint:** The combined standard hours for primary and secondary roles held by a single individual may not exceed 40. Due to restrictions enforced by the Fair Labor Standards Act (FLSA), any individual regularly scheduled to work more than 40 hours per week should be paid overtime (generally time and a half) by the responsible department for all hours incurred beyond the 40 hour limit.

**Entering a Temporary Employee or Retiree Role**

Temporary employees are defined as individuals filling non-benefits-eligible roles at the University for a period of time lasting six months or less. For purposes of HRMS classification, retirees are individuals who were previously employed by the University in staff or faculty roles and are returning to work on irregular or as-needed bases following retirement. Both temporary and retiree roles are subject to certain labor guidelines and are assigned specific job codes to identify them as such.

The following instructions outline the basic transactions for adding a first-time temporary role. In the case of a temporary employee who previously worked at the University or a retiree, the new temporary or retiree role should be entered on the same row as the individual’s last position to avoid excessive entries in HRMS. Refer to “Entering a Rehire/Return to Work” for instructions.
• Log into HRMS.
• Click on “Job and Compensation” in the left-hand navigation bar. Select “Hire Emp/Add NonEmp/Add ConJob.”
• Enter the new hire’s social security number as provided by him/her on the PIF form. Select “Emp” from the “Person Type” dropdown menu and click “Search.”
• Click the blue “Hire New Employee” link that appears under the “Search” button.
• Enter the effective date of the hire in the “Job Effective Date” field. Ensure that the “Employment” reason is selected in the “Reason Code” dropdown menu. Click “Next.”
• Complete the fields provided in the hire template. Required fields are noted with an asterisk (*). Click “Next” when finished.
  o Do not use all caps when entering hire data.
  o Within the hire template, phone numbers should be entered in XXX/XXX-XXXX format.
  o Bypass the grayed out “Original I-9 Date” and “Reverified I-9 Date” fields, as they are provided for HR use only.
  o Enter the appropriate number in the “Check Delivery No” field, making sure to verify the correct campus box with the hiring department if applicable.
• Complete the remaining fields provided on the second page of the hire template. Required fields are noted with an asterisk (*). Click “Save and Submit” when finished.
  o Select “HILBU – Danforth Campus” from the dropdown menu in the “Business Unit” field.
  o Enter the appropriate annual rate of pay in the “Comp Rate” field under “Job Compensation – Pay Components.”
  o NOTE: The warning, “An action of hire, rehire, additional role or transfer for a staff role requires a job requisition number. Press OK to Proceed. Press Cancel to enter data” refers to the job opening number assigned by the TAM system. Verify that the appropriate information has been entered into the hire template.
• When the hire screen opens, move through all tabs and verify the data on each.
  o On the “Job Information” tab, ensure that the temporary job code, X1EN01, or the retiree job code, X1EN03, is selected as applicable. If another job code applies, contact the Office of Human Resources.
  o Verify that the “Regular/Temporary” indicator is set to “temporary.”
  o Ensure that the “Standard Hours” field shows 0 hours.
  o On the “Additional Job Data” tab, select the appropriate indicator in the “New ARRA Related Position?” dropdown menu.
• Click on the blue “Sources” link to open the Sources window and enter the appropriate information in the provided “Earnings” fields. Select the “Approval” tab and click “Approve One” or “Approve” as appropriate based on departmental workflow. Close the Sources window.
• Select the “Approval” tab in the job record and click “Approve One” or “Approve” as appropriate based on departmental workflow.
• The entry will be routed to HR for review and approval.

**Helpful Hint:** The “regular/temporary” indicator on the hire screen is programmed to automatically default to the correct setting based on the job code selected. Users should not change the indicator manually, as doing so may disrupt the University’s reporting processes.
Helpful Hint: Temporary positions should last no longer than six months. If a temporary assignment requires extension beyond this timeframe, contact the Office of Human Resources for assistance.

Helpful Hint: Returning temporary employees must have a break in service of at least 90 days between temporary assignments at the University. For details or questions concerning this policy, contact the Office of Human Resources.

Helpful Hint: Temporary employees and retirees should be entered into HRMS as part of the biweekly paygroup. For questions, contact the Office of Human Resources.

Initiating and Completing a Transfer

Transfer of an employee from one University department to another is a four-step process that requires action on the parts of both departments. In addition to completing the transfer of the employee’s job record, each department must also complete transfer of the employee’s vacation accrual.

Step 1

Originating Department:

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.” Enter known information into the provided fields as it pertains to the employee. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of one day after the employee’s last day worked in the department in the “Job Effective Date” field.
- Select “Transfer” from the dropdown menu in the “Action” field, followed by the most appropriate option from the dropdown menu in the “Reason” field.
- Enter the new department number in the “Department” field, followed by the corresponding location in the “Location” field, if applicable.
- Select the “Approval” tab and enter any notes, as well as the statement “New department responsible for editing all tabs.” Click “Save.”

Step 2

Originating Department:

- Click on the link corresponding to the transferred employee in the worklist, once available.
  - NOTE: Paysheets become available for a limited time following payroll processing each month. Contact your department payroll representative for assistance with accessing paysheets for a transferred employee.
- Select “Paysheet – Job Dept” from the left-hand navigation bar, then enter the six-digit department number of the originating department in the “Department” field. Click “Search.”
• Access the appropriate paysheet for the transferred individual by clicking on the corresponding blue link.
• Enter “VCA” in the “Code” field under “Other Earnings.”
• For a non-exempt employee, enter the positive number of vacation hours that will be transferred to the new department in the “Hours” field (e.g., if the employee has 30 hours of vacation accrued, the originating department should enter “30” in the “Hours” field). For an exempt employee, multiply his/her monthly pay rate by the number of vacation days to be transferred and divide the total by 22. Enter the resulting balance as a positive dollar amount in the “Amount” field.
• Click “Save” and close the paysheet window.

Step 3

New Department:

• Log into HRMS.
• Access the transferring employee’s job record by navigating to “Job and Compensation,” “Job Data,” and then searching on identifying information, or by clicking on the link provided in the worklist.
• Review all tabs and verify the information on each. Confirm that the correct option has been selected from the dropdown menu in the “Reason” field. Make any necessary changes.
• Select the “Approval” tab and enter any notes. Click “Approve One” or “Approve” as appropriate based on departmental workflow.

Step 4

New Department:

• Click on the link corresponding to the transferred employee in the worklist, once available.
  o NOTE: Paysheets become available for a limited time following payroll processing each month. Contact your department payroll representative for assistance with accessing paysheets for a transferred employee.
• Select “Paysheet – Job Dept” from the left-hand navigation bar, then enter the six-digit department number of the originating department in the “Department” field. Click “Search.”
• Access the appropriate paysheet for the transferred individual by clicking on the corresponding blue link.
• Enter “VCA” in the “Code” field under “Other Earnings.”
• For a non-exempt employee, enter the negative number of vacation hours that will be transferred from the previous department in the “Hours” field (e.g., the new department should enter “-30” in the “Hours” field). For an exempt employee, multiply his/her monthly pay rate by the number of vacation days to be transferred and divide the total by 22. Enter the resulting balance as a negative dollar amount in the “Amount” field.
• Click “Save” and close the paysheet window.

Helpful Hint: When transferring vacation accruals between departments, both departments should enter their transactions within the same pay period. In the event it’s not possible to complete both transactions within this timeframe, contact the Office of Human Resources.
INACTIVATING AN INDIVIDUAL’S RECORD

Entering a Termination

A termination occurs when an individual’s last remaining active role ends. Typically, the last active role should be the primary role.

- Log into HRMS.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Job Data.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of one day after the individual’s last day worked in the “Effective Date” field. Select “Termination” from the dropdown menu in the “Action” field, followed by the appropriate reason for termination in the “Reason” field.
- Move through all tabs and verify the information on each.
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

Helpful Hint: If a terminated individual will receive severance or if the action “terminated with benefits “ or “terminated with pay” appears to apply, contact the Office of Human Resources for assistance.

Helpful Hint: If an individual’s role is ending and another active role remains in the HRMS system, the action of “completion” should be used in place of “termination.” Refer to “Entering a Completion” for instructions.

Entering a Completion

A completion occurs when an individual’s non-primary role ends, leaving another active job in the HRMS system.

- Log into HRMS.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Job Data.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of completion in the “Effective Date” field. Select “Completion” from the dropdown menu in the “Action” field, followed by the appropriate reason for completion in the “Reason” field.
- Move through all tabs and verify the information on each.
• On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
• The entry will be routed to HR for review and approval.

Helpful Hint: If multiple secondary appointments are present in the HRMS system, the action of “completion” should be used when ending any of them while a primary appointment remains active in the system. Multiple positions may be completed, but the “terminated” status typically applies only to the primary role.

Helpful Hint: All non-employee roles should end in an action of “completion.”

Entering a Death

Death is a permanent action of termination from the University. A death is entered into HRMS only when the deceased is an active employee or a retiree of the University at the time of his/her death.

• Log into HRMS.
• Click on “Job and Compensation” in the left-hand navigation bar. Select “Job Data.”
• Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
• Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
• Enter the date of one day after the employee’s death in the “Effective Date” field.
• Select “Termination” from the dropdown menu in the “Action” field, followed by “Death” in the “Reason” field.
• On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
• The entry will be routed to HR for review and approval.

Helpful Hint: Departments are strongly urged to contact the Office of Human Resources for assistance when entering a death to ensure that benefits are properly administered, if applicable.
ENTERING TEMPORARY ABSENCES AND RETIREMENT

Placing a Student Employee on Short Work Break

A short work break typically comprises the summer months, when a student employee does not work. In this situation, a student employee must be placed on short work break status in HRMS in order to temporarily stop the creation of his/her paysheets for the corresponding position.

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.”
- Enter known information into the provided fields as it pertains to the student. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of one day after the student’s last day worked in the “Effective Date” field. Select “Short Work Break” from the dropdown menu in the “Action” field.
- Select “Semester Schedule,” “Summer Work Break,” or “Work Break Between Jobs” from the dropdown menu in the “Reason” field. If another reason appears to apply, contact the Office of Human Resources.
- Move through all tabs and verify the information on each.
  - Do not change the “Regular/Temporary” indicator selection or the number of standard hours shown on the “Job Information” tab.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

**Helpful Hint:** Short work breaks apply only to students. If a staff or faculty employee works a nine-month or other non-year-round appointment, he/she must be placed on a leave of absence during the inactive months, using a reason of “semester schedule” or other appropriate option. Staff and faculty employees should not be placed on short work breaks. Refer to “Entering a Leave of Absence” for instructions.

**Helpful Hint:** A short work break may not exceed nine months in duration. If a student employee will not be working for a period of longer than nine months, he/she should be terminated and rehired upon returning to work. Consult the Office of Human Resources for assistance in this situation.

**Helpful Hint:** The “regular/temporary” indicator on the hire screen is programmed to automatically default to the correct setting based on the job code selected. Users should not change the indicator manually, as doing so may disrupt the University’s reporting processes.
Entering a Leave of Absence

A leave of absence refers to periods when a staff or faculty employee is physically absent from the University, but remains in active employment status. Often, a leave of absence is anticipated, such as in the case of a faculty sabbatical or a nine-month or other non-year-round appointment. Other leaves, such as those governed by the Family and Medical Leave Act (FMLA), may or may not be pre-planned. In this situation, a student employee must be placed on leave of absence status in HRMS in order to temporarily stop the creation of his/her paysheets for the corresponding position. Leaves of absence apply only to staff and faculty members and may be any duration in length.

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.” Enter known information into the provided fields as it pertains to the employee. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of one day after the employee’s last day worked in the “Effective Date” field. Select “Leave of Absence (Paid)” or “Leave of Absence (Unpaid)” as appropriate from the dropdown menu in the “Action” field.
- Select the appropriate reason for leave from the dropdown menu in the “Reason” field.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

**Helpful Hint:** Departments are strongly urged to contact the Office of Human Resources for assistance when using the “leave of absence” statuses. Additional paperwork pertaining to the employee’s leave may be required by federal law or University policy, such as in the case of FMLA or faculty sabbatical.

Entering a Sabbatical

A sabbatical is a faculty-specific, pre-approved leave of absence that may be paid or unpaid depending on the school’s stipulations.

- Log into HRMS.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Job Data.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date that the sabbatical will begin in the “Effective Date” field.
- Select “Leave of Absence (Paid)” or “Leave of Absence (Unpaid)” as appropriate from the dropdown menu in the “Action” field, followed by “Faculty Sabbatical” in the “Reason” field.
- Enter the anticipated date of the employee’s return to work in the “Expected Return Date” field.
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.
Helpful Hint: An approval letter should be obtained from the department chair prior to entering a faculty member’s sabbatical into HRMS. If the approval letter has not been issued, contact the Office of Human Resources for assistance.

Entering a Retirement

Retirement is typically a permanent action of termination from the University; however, retirees may occasionally return to part-time and/or temporary work following formal retirement. In such instances, refer to “Activating an Individual’s Record: Entering a Temporary Employee or Retiree Role” for instructions.

- Log into HRMS.
- Click on “Job and Compensation” in the left-hand navigation bar. Select “Job Data.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of one day after the employee’s last day worked in the “Effective Date” field.
- Select “Retirement” from the dropdown menu in the “Action” field, followed by “Personal Reasons” or “Successive Retirement” in the “Reason” field. If another reason appears to apply, contact the Office of Human Resources.
- On the “Approval” tab, click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

Helpful Hint: Departments are strongly urged to contact the Office of Human Resources for assistance when entering a retirement. Retiree status carries unique applications of specific University benefits which should be clarified with HR to ensure that they are properly administered.
ENTERING FACULTY RECORDS

Entering a Faculty Title

Tenured and tenure track faculty are assigned titles in HRMS upon their hire. Titles recorded in the system are used to address official correspondence to faculty members, such as tenure letters and other related documents.

- Log into HRMS.
- Click on “Faculty Data” in the left-hand navigation bar. Select “Faculty Title Summary.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- If a blank row does not exist, click on the blue “+” in the upper right-hand corner of the provided “Faculty Title” box to add a new row.
- Enter the same effective date as that shown on the new hire job record in the “Effective Date” field.
- On the “Employee” tab, click on the magnifying glass next to the “Empl Rcd” box. Select the employee’s primary record.
- Rank the title according to how correspondence should be addressed to the employee by entering the appropriate number in the “Letter Priority” box (the title assigned Letter Priority 1 will appear first, followed by the Letter Priority 2 title, and so on).
- Select the “Letter Title” tab and enter the title wording exactly as it should appear on correspondence sent to the employee.
- Select the “Dept Info” tab and verify that the data shown is correct.
- Click “Save.”

Helpful Hint: HRMS will not automatically prompt the user to complete the Faculty Data screens. If a faculty title applies, ensure that the screens are completed prior to routing the new hire entry to HR for review and approval.

Entering a Faculty Title in the Absence of a Corresponding Job Record

Occasionally, a department may wish to enter a title only on a tracked faculty member's record. In this situation, the process for HRMS entry is nearly identical to that for entering a faculty title with the job record in place (above).

- Log into HRMS.
- Click on “Faculty Data” in the left-hand navigation bar. Select “Faculty Title Summary.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- If a blank row does not exist, click on the blue “+” in the upper right-hand corner of the provided “Faculty Title” box to add a new row.
- Enter the date that the title will take effect in the “Effective Date” field.
- On the “Employee” tab, verify that the “Empl Rcd” box is blank.
• Rank the title according to how correspondence should be addressed to the employee by entering the appropriate number in the “Letter Priority” box (the title assigned Letter Priority 1 will appear first, followed by the Letter Priority 2 title, and so on).
• Select the “Letter Title” tab and enter the title wording exactly as it should appear on correspondence sent to the employee.
• Select the “Dept Info” tab and verify that the data shown is correct.
• Click “Save.”

**Helpful Hint:** While a faculty title may be entered without a corresponding job record in HRMS, the individual to whom the title is being assigned must be listed in the system. If the employee to whom the title is being assigned cannot be located in HRMS, contact the Office of Human Resources for assistance.
USING SYSTEM MODULES

Using the Time & Labor Module

Time & Labor provides tools for electronic timekeeping and management of leave balance records in a central, secure location. It also ensures accuracy and consistency in the university’s administration of these processes.

Managers or supervisors of University employees may access the Time & Labor module to review and approve time reporting by their subordinates.

- Log into HRMS.
- Click on “Manager Self Service” in the left-hand navigation bar. Select “Time Management,” followed by “Approve Reported Time.”
  - **NOTE:** The search page displays the names of all employees for whom the user is responsible for reviewing and approving reported time. Employees who have submitted time data as of the user’s system access are displayed at the top of the list in alphabetical order, followed by those who have not submitted time data as of that point in time.
- Click on the employee’s name to select and display his/her reported time.
- If the reported data is accurate, click on the yellow “Approve Timesheet” button. If the reported data is inaccurate, the supervisor may deny the reported time and return it to the employee with comments, or the supervisor may change the subordinate’s reported time him/herself.
  - **NOTE:** When reported time is returned to the employee for revision or is changed by the supervisor, an email notification will be sent to the employee. If the employee corrects the reported time and resubmits it to his/her supervisor, an email notification will be sent to the supervisor.
  - All submitted time must be reviewed and approved no later than 12:00 p.m. on the day of payroll processing (typically every other Tuesday for biweekly employees).

**Helpful Hint:** For questions concerning use of the Time & Labor Module, department payroll administrators should contact their Payroll representative or the Office of Human Resources.

Using the TAM Module

The Talent Acquisition Manager (TAM) system is utilized by the Employment Office to post jobs, recruit applicants, review and refer applications, and hire selected candidates. When an individual is hired through TAM, he/she may access and complete the electronic PIF form, eliminating the need for completion of the hard copy form. Additional benefits to the department also apply when utilizing the TAM system for posting jobs and hiring employees.

**Helpful Hint:** For assistance with the TAM system or to post a job, contact the Employment Office.
MAINTAINING ACCURATE DATA

Primary and Secondary Jobs

All active individuals in the HRMS system should have a primary appointment. In the event a primary appointment ends and a secondary appointment is still active in the system, the two involved departments are responsible for coordinating their efforts so that the existing secondary appointment will assume the primary appointment status as of the ending of the existing primary appointment.

To change an appointment from a secondary role to a primary role, the department assuming the primary appointment status should use the relevant action/reason code combination to document the change in HRMS.

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.” Enter known information into the provided fields as it pertains to the employee. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the date of one day after the employee’s last day worked in existing primary appointment in the “Effective Date” field. Select “Data Change” from the dropdown menu in the “Action” field.
- Select “Change Primary/Secondary Job” from the dropdown menu in the “Reason” field.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.
- The entry will be routed to HR for review and approval.

Helpful Hint: A department assuming a new primary appointment status is not automatically notified of the need to complete a data change in HRMS. The department ending the existing primary appointment should contact the payroll representative or business manager of the existing secondary appointment to confirm the change and to coordinate effective dates.

Helpful Hint: For questions concerning primary/secondary role data changes, contact the Office of Human Resources.

Name Changes

Name changes may only be completed by the Office of Human Resources. In the event an individual’s name needs to be updated in the HRMS system, he/she should send a copy of his/her social security card to HR with a written request for the change. Note that the social security card should display the new or desired name.

Helpful Hint: All name changes within HRMS must be made by the Office of Human Resources.
Other Data Changes

In the event data within an employee’s HRMS record needs to be changed, excluding corrections to job status or salary, the department managing the affected appointment should use the relevant action/reason code combination to document the change in HRMS.

- Log into HRMS.
- Click on “Job & Compensation” in the left-hand navigation bar. Select “Job Data.” Enter known information into the provided fields as it pertains to the employee. Click “Search.”
- Click on the blue “+” in the upper right-hand corner of the provided “Work Location” box to add a new row.
- Enter the effective date of the change in the “Effective Date” field. Select “Data Change” from the dropdown menu in the “Action” field.
- Select “Campus Address Change,” “Correct Department,” or “Correct Location” as appropriate from the dropdown menu in the “Reason” field. Consult with the Office of Human Resources before proceeding if another reason code appears to apply.
- Correct the appropriate field(s) within the template.
- Click “Save.” Click “Approve One” or “Approve” as appropriate based on departmental workflow.

Helpful Hint: Contact the Office of Human Resources for assistance with data changes.

Monitoring “No Pay for 90 Days”

When individuals remaining active within HRMS are not paid for 90 days or more, this inactivity implies that they are not truly actively employed at the University. In order to maintain accurate records, all individuals who are not paid for 90 days or more should be terminated within the system.

To determine which individuals in their respective areas have not been paid within the previous 90 days, departments should run one or more of three public queries in HRMS on a regular basis, ideally at least once per month.

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Population Identified</th>
</tr>
</thead>
<tbody>
<tr>
<td>WP_DP_ACTIVE_NO_PAYCHECK_OTHER</td>
<td>Staff/faculty not paid for 90 days</td>
</tr>
<tr>
<td>WP_DP_ACTIVE_NO_PAYCHECK_SDNT</td>
<td>Students not paid for 90 days</td>
</tr>
<tr>
<td>WP_DP_ACTIVE_NO_PAY_FOR_X_DAYS</td>
<td>Individuals of any type who have not been paid with a user-defined timeframe</td>
</tr>
</tbody>
</table>

Helpful Hint: Contact the Office of Human Resources with questions or for assistance with identifying and maintaining data on individuals who have not been paid for 90 days or more.

Monitoring Duration of Short Work Breaks

Student employees placed on short work break within HRMS may remain in that status for a maximum of nine months. In order to maintain accurate data, students who have not returned to work after nine
months should be terminated. If the student returns to work at a later date, he/she should be rehired in HRMS at that time.

To determine which student employees in their respective areas have been on short work break for more than nine months, departments should run the public query titled “WP_DP_LOA_SWB_9MOS” in HRMS on a regular basis, ideally at least once per month.

Helpful Hint: Contact the Office of Human Resources with questions or for assistance with identifying and maintaining data on students who have been on short work break for more than nine months.

Entering Leave Balance Adjustments

In some circumstances, it is necessary to adjust an employee’s leave balance. The “Leave Balance Adjustments” function should be used to enter increases or decreases in an employee’s leave balance for sick, vacation, or personal days. After applying a balance adjustment in HRMS, the balance will be updated within 20 minutes.

- Log into HRMS.
- Click on the Main Menu drop-down and select “Manager Self Service,” followed by “Time Management” and “Leave Balance Adjustments.”
- Enter the employee’s empl ID or other identifying information and click “Search.” If multiple matches are found, select the appropriate entry by clicking on the corresponding blue link.
- Select “Vacation,” “Sick” or “Personal” from the “Type” menu as appropriate to describe the leave balance adjustment.
- Enter the date that the adjustment should take effect (adjustments are applied at the end of the corresponding pay periods).
- Enter the amount of the adjustment in terms of hours.
- Enter an explanation for the adjustment in the “Comments” field.
- Click “Save.”

Helpful Hint: When entering leave adjustments in terms of hours, positive entries in the “Amount” field will increase the employee’s leave balance, while negative entries will decrease the balance. For example, entering “7.5” will increase the balance by one day, while entering “-7.5” will decrease the balance by one day.

Helpful Hint: A standard workday for a full-time employee on the Danforth Campus is 7.5 hours. When entering adjustments, be sure adjustment amounts are correctly converted into hours.