STUDENT HIRE E-FORM - ZHR_STUDENT_HIRE

The new Student E-Form, IRIS transaction **ZHR_STUDENT_HIRE**, is designed to offer a streamlined process for onboarding undergraduate student workers/rehires in the IRIS system. The new functionality allows the user to input the necessary information and allows attachments for documentation.

This documentation will walk the user through each step of the process and will include screenshots for easy identification.

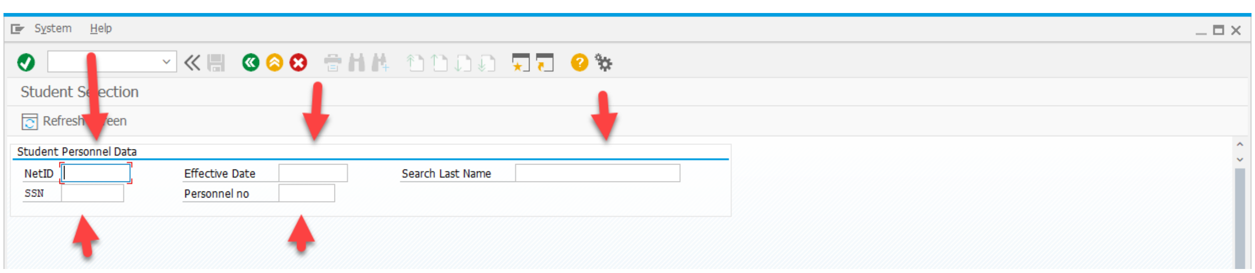
OVERVIEW

In order to successfully complete each transaction you will need:

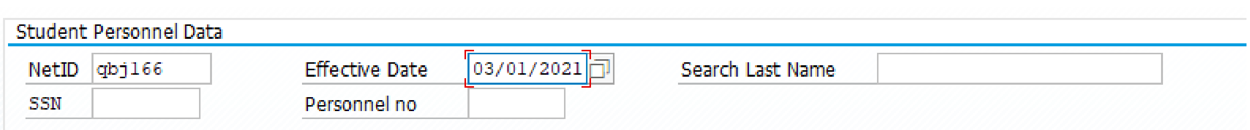
- The NetID or SSN of the student or the personnel number of the rehire
- Student's address, phone, and other personal information such as gender, nationality, marital status, nationality, etc. as well as the W-4 and Disclosure Form. Rehires should have most of that information preloaded into the system and will only need updated as necessary.
    - **Authorization of Disclosure is not a required document in order to submit into workflow, however those options are available.**

STEP 1 - STUDENT SELECTION SCREEN

The first screen in the transaction is the "Student Selection" screen. New hires may be input by NetID, SSN, "Search Last Name", or "Personnel no". "Effective Date" must be selected in order to complete this initial process.

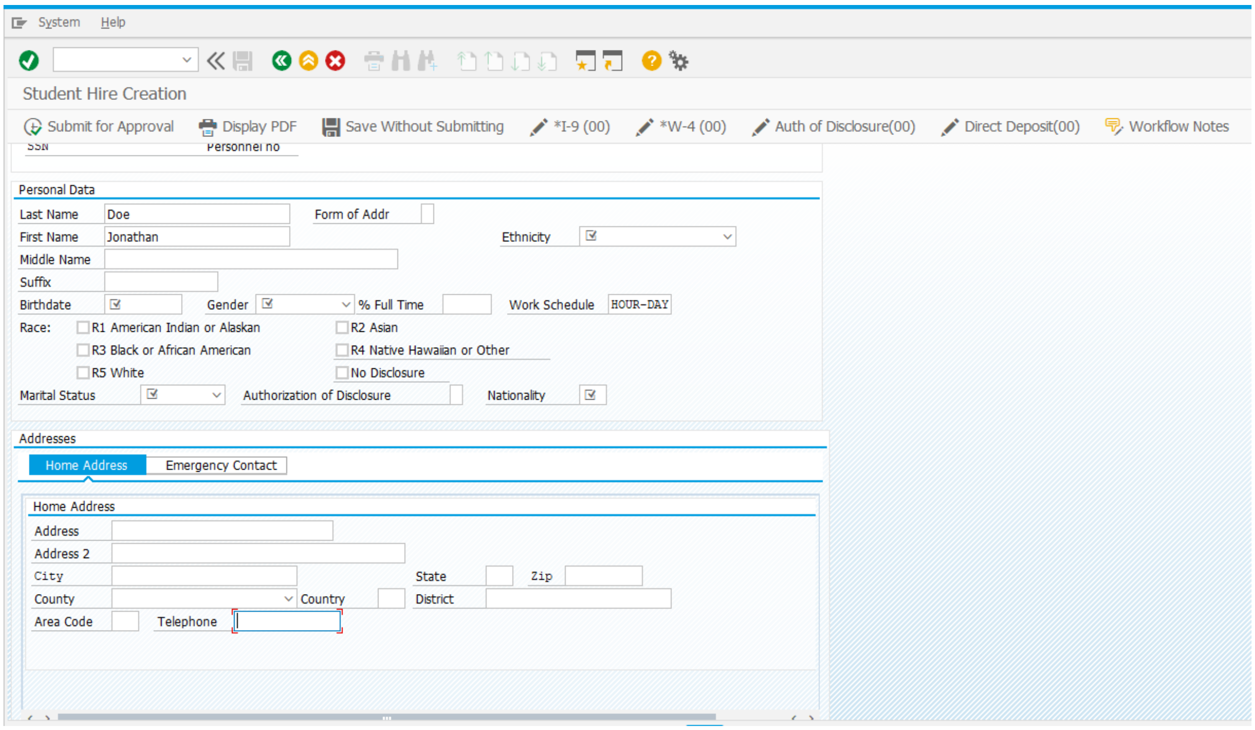


In the example below the NetID and effective date have been entered. Select ✓ in order to continue to the next screen or "Enter" on your keyboard.



STEP 2 – STUDENT HIRE CREATION

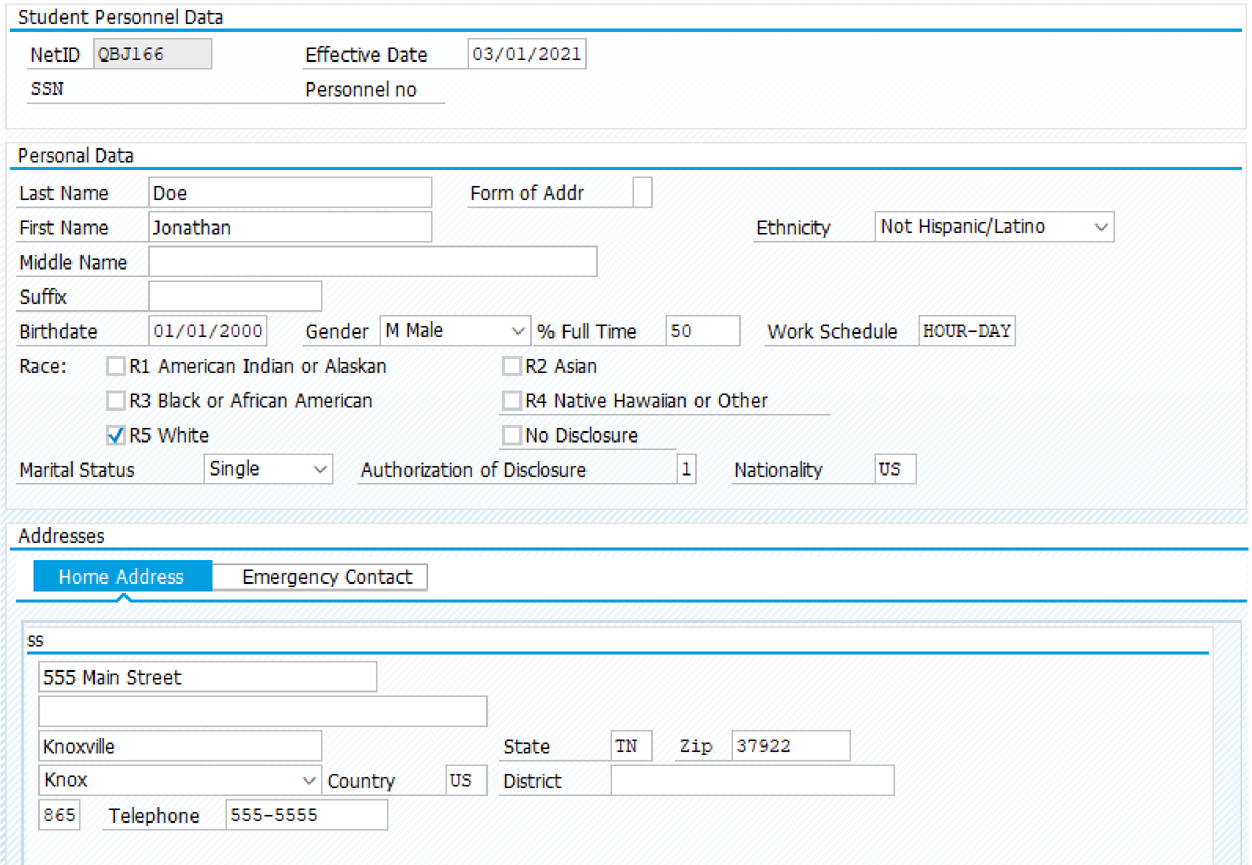
In this step, the student name pre-populates as you begin. This transaction is designed to be "one stop" as all information needed to successfully onboard a new hire is included. Here you can attach the W-4, I-9 Supporting Documents, Disclosure Statement, as well as input Ethnicity, Birthdate, Gender, Address, Phone, etc.



INPUT SCREEN

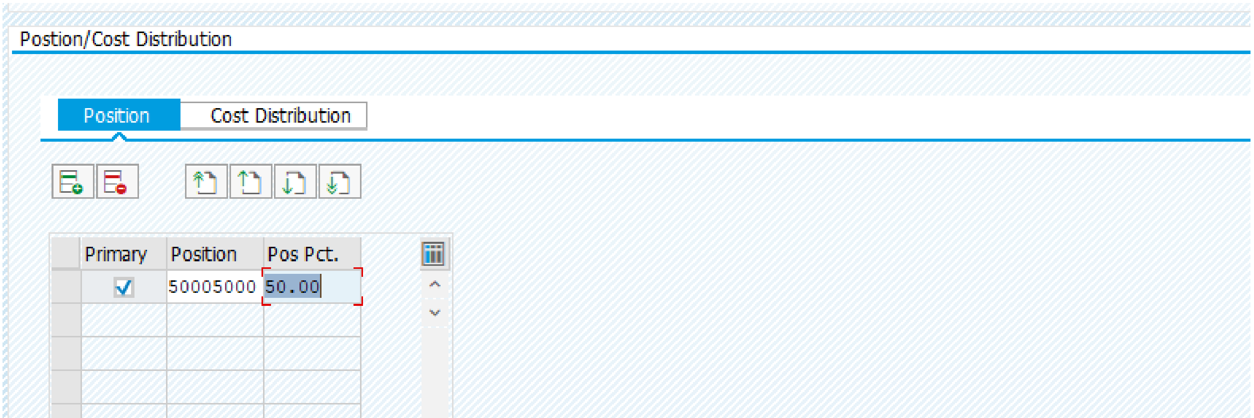
Below is an example of the data that will need to be submitted before the form can proceed in workflow. While NetID, Effective Date, first and last name and Work Schedule are pre-populated, most of the remaining fields will need to be entered. The following fields are required:

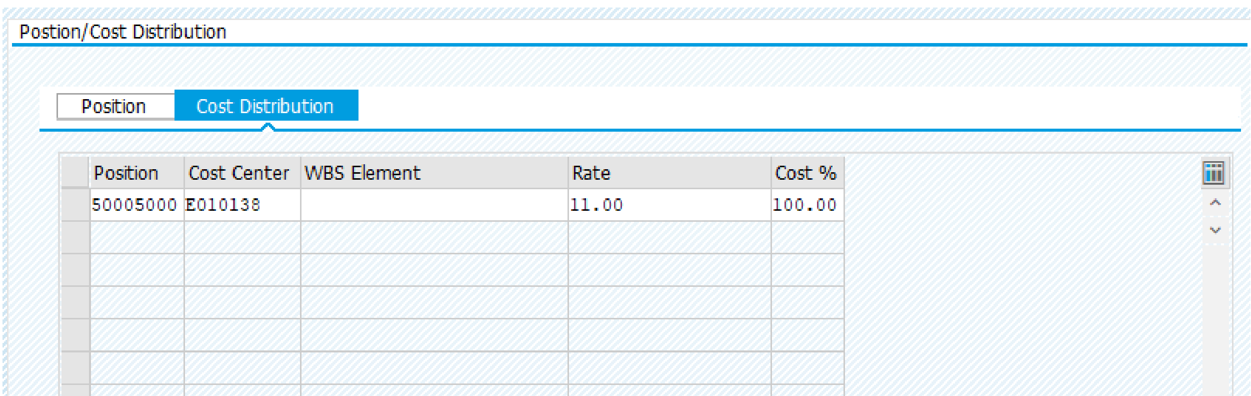
- Ethnicity
- Birthdate
- Gender
- % Full Time
- Work Schedule – There are only two work schedules available for UT Student Assistants; HOUR-DAY and BIW-STD.
- Race
- Marital Status
- Nationality
- Complete address
- Telephone



At the bottom of the screen, the "Position/Cost Distribution" section must also be complete. There are two tabs: "Position" and "Cost Distribution".

The Position Percentage total cannot exceed the % Full Time entered under Personal Data. An employee can be hired into multiple positions across departments. Each department that has a position listed will be routed the work item for approval. For the Cost Distribution screen, all positions and their Responsible Cost Center will automatically be added to the Cost Distribution. However, the Cost Center can be changed and multiple funds can be added for an individual position. The total of the Cost % must add up to 100%.

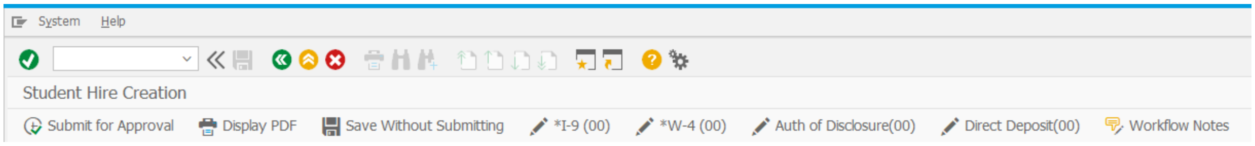


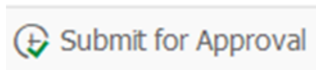


Once all fields and attachments are complete, select either “Save Without Submitting”, or “Submit for Approval”, which sends the form into workflow.

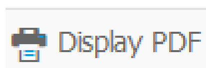
<u>ACTION BUTTONS</u>

At the top of the page a series of "Action Buttons" are provided that allows submitting for approval, saving without submitting, and attachments of new hire forms.

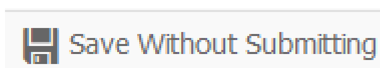


- **<u>Submit for Approval</u>** 

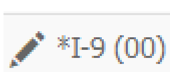
Once the form is completely filled and accurate, select "Submit for Approval". The system will generate an error message if all required fields have not been filled. In order to alleviate inaccuracies later in workflow, it is recommended that the form be checked for input errors before submitting. This button submits the document into workflow.

- **<u>Display PDF</u>** 

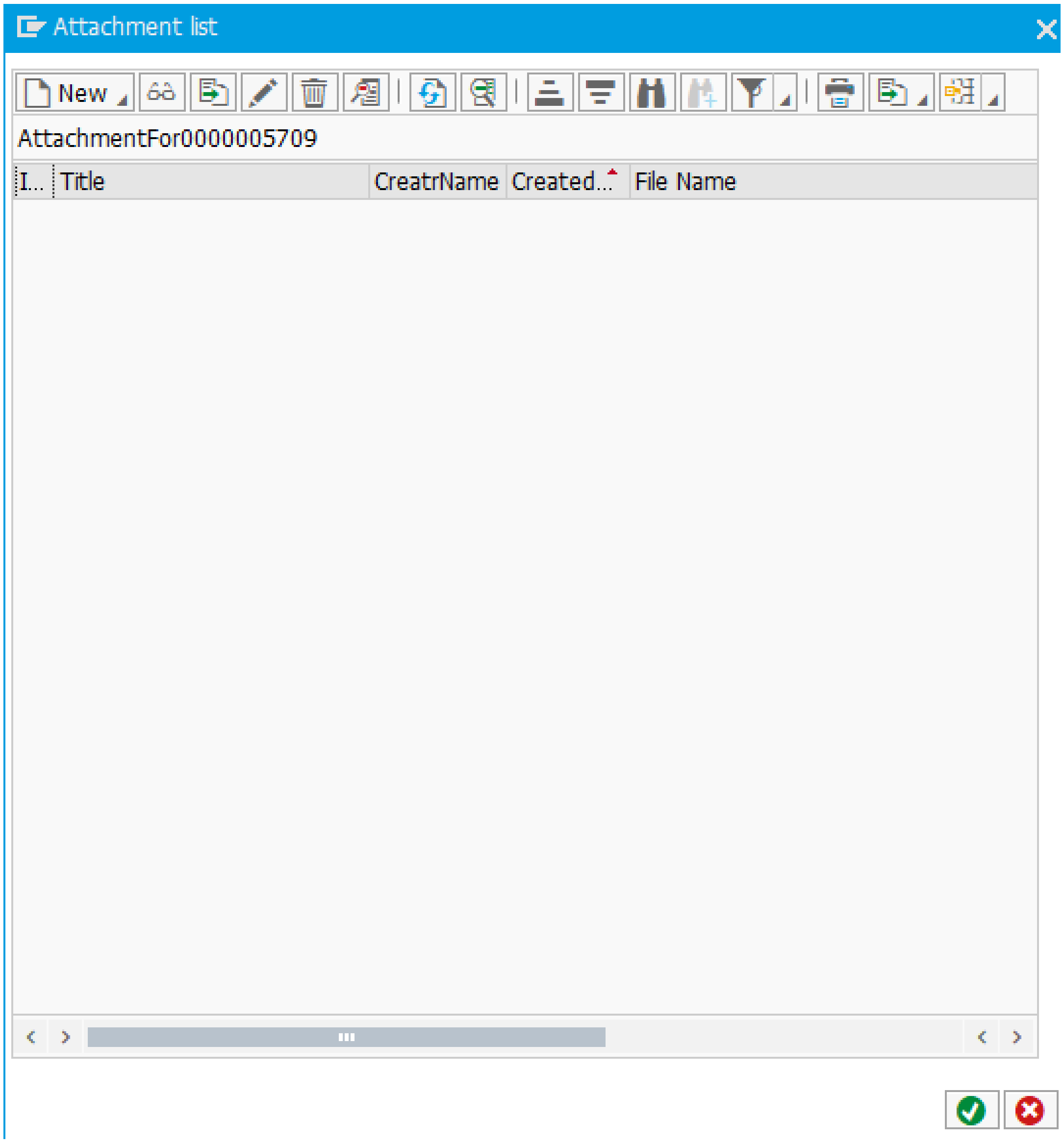
This functionality generates a printable PDF of the form, as needed. An error message is displayed if all fields are not complete.

- **<u>Save Without Submitting</u>** 

"Save Without Submitting" allows the form to be saved, such as in the case of having incomplete information, without losing the entered data. The form will not be submitted into workflow with this option.

- **<u>I-9</u>** 

The I-9 button allows the attachment of the I-9 form. This form is required for submission to workflow. Only one attachment for the I-9 is allowed so the I-9 and any supporting documentation should be consolidated into a single PDF. It generates a pop-up window as seen below.

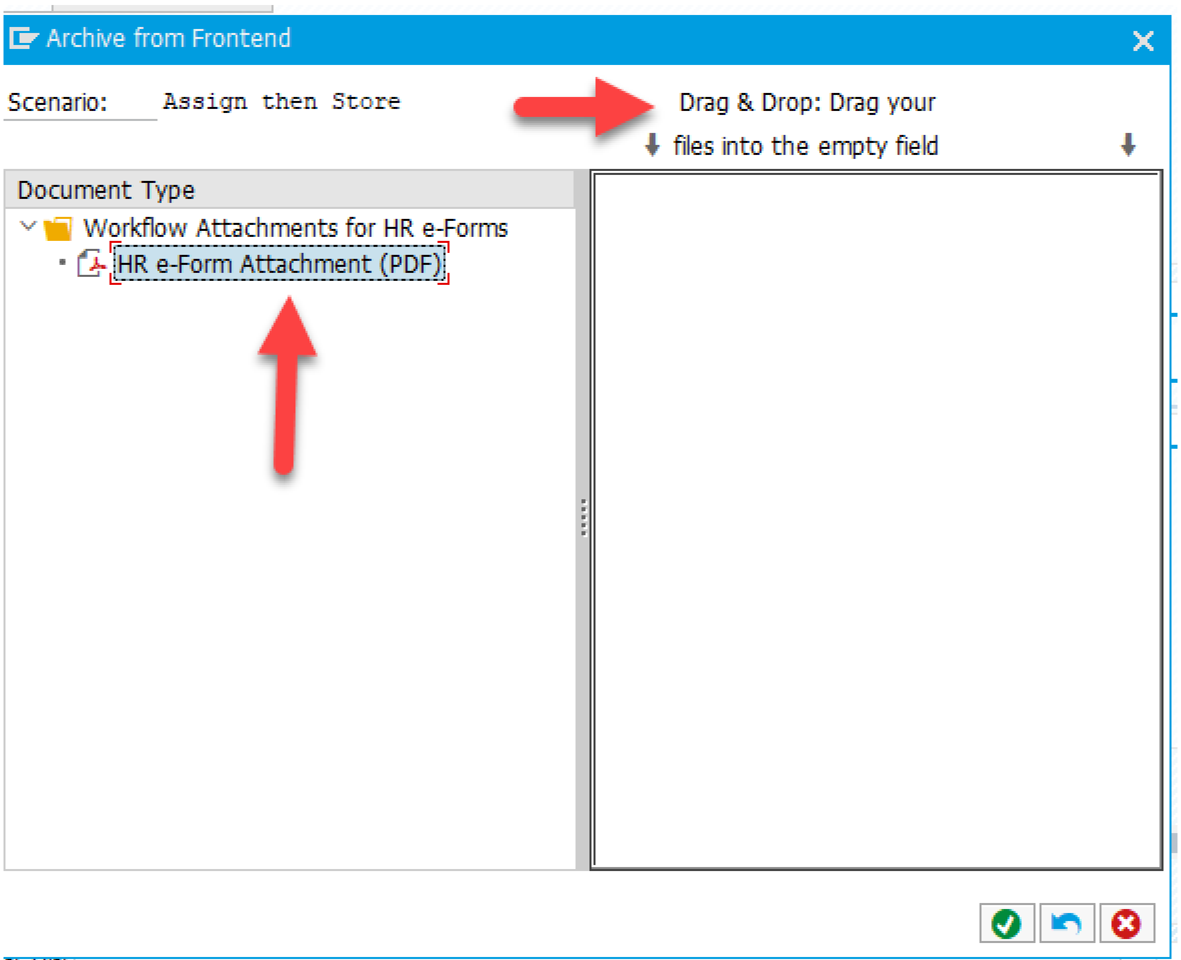


To create the attachment, select 

in the upper left hand corner of the screen. It will then generate a new pop-up as seen below. Options include “Drag & Drop” or “HR e-Form Attachment (PDF)”. As the command states, the form must be in a PDF format.

Select  to complete the attachment. The command generates a new window, as shown in the screenshot below.

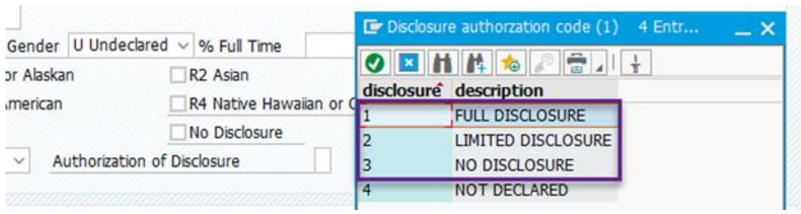
Unless the form has been filled completely with the correct address, phone, position % and all other required fields, an error message is created.

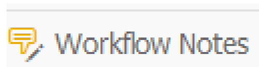


- <u>**W-4, Auth of Disclosure**</u>

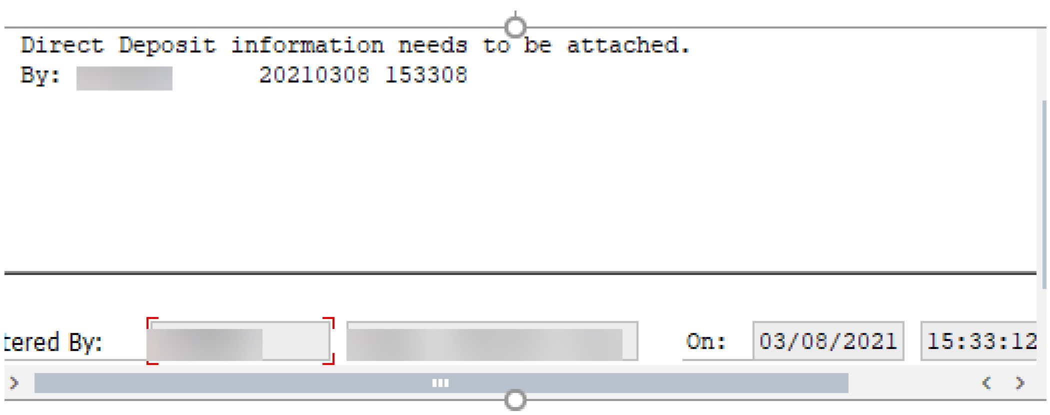
These buttons operate in much the same way as "I-9", again allowing for PDF attachments. All documents should be attached before selecting "Submit for Approval". If information is incomplete it is recommended to "Save Without Submitting".

- **The W-4 attachment is required for submission to workflow.**
- **The Authorization of Disclosure document is only required if a value other than "4 – Not Declared" is selected. If values 1,2, or 3 are selected an Authorization of Disclosure is required at some point during workflow. This document is not necessary for submission regardless of the value.**



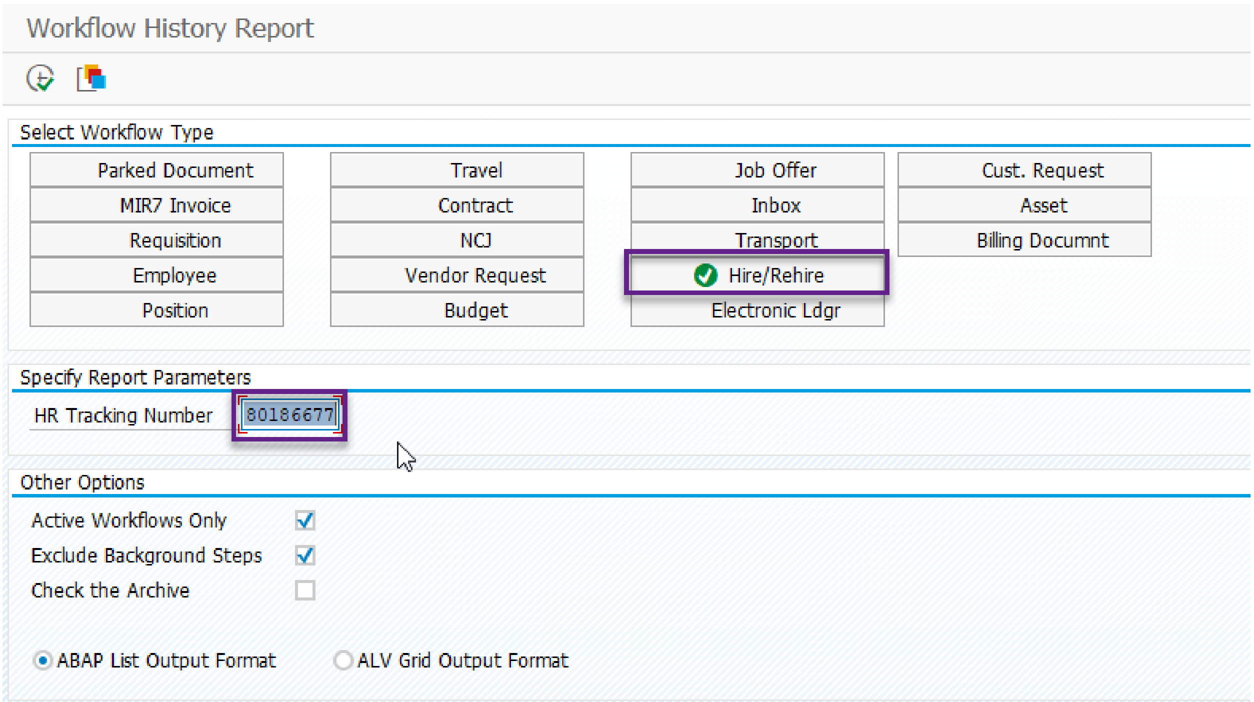
- **<u>Workflow Notes</u>** 

Workflow notes allows the user to submit a message into the system that may be relevant for the workflow, however this is not required for submission. An example of a workflow note may be “Needs Direct Deposit Documentation” or any other information deemed necessary.

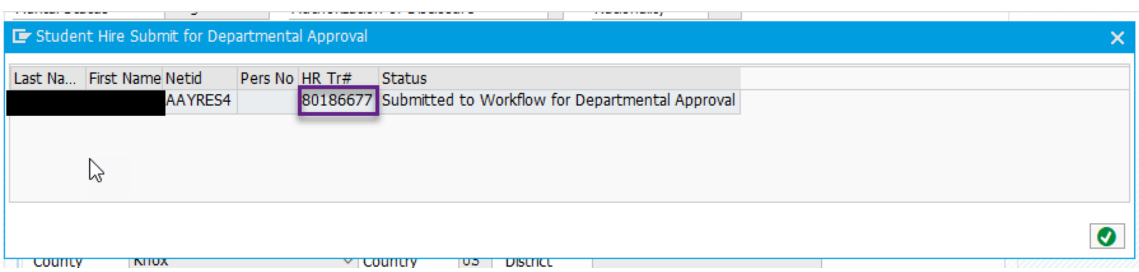


WORKFLOW TRACKING

The transaction **ZWF_HISTORY** may be used to track workflow. Using the workflow tracking number for a new hire, or the personnel number for a rehire, the transaction shows the history of the work item and where it is currently located.

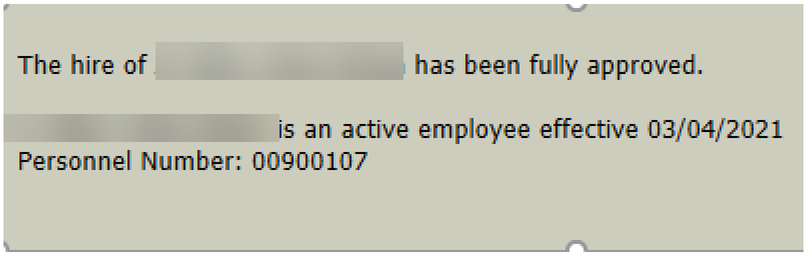


The workflow tracking number can be found when the form is submitted into workflow.



The workflow route is **Departmental Approver>College Reviewer (if applicable)>College Reviewer (if applicable)>HR>Payroll**. If a form has been rejected, it must then be revised and resubmitted.

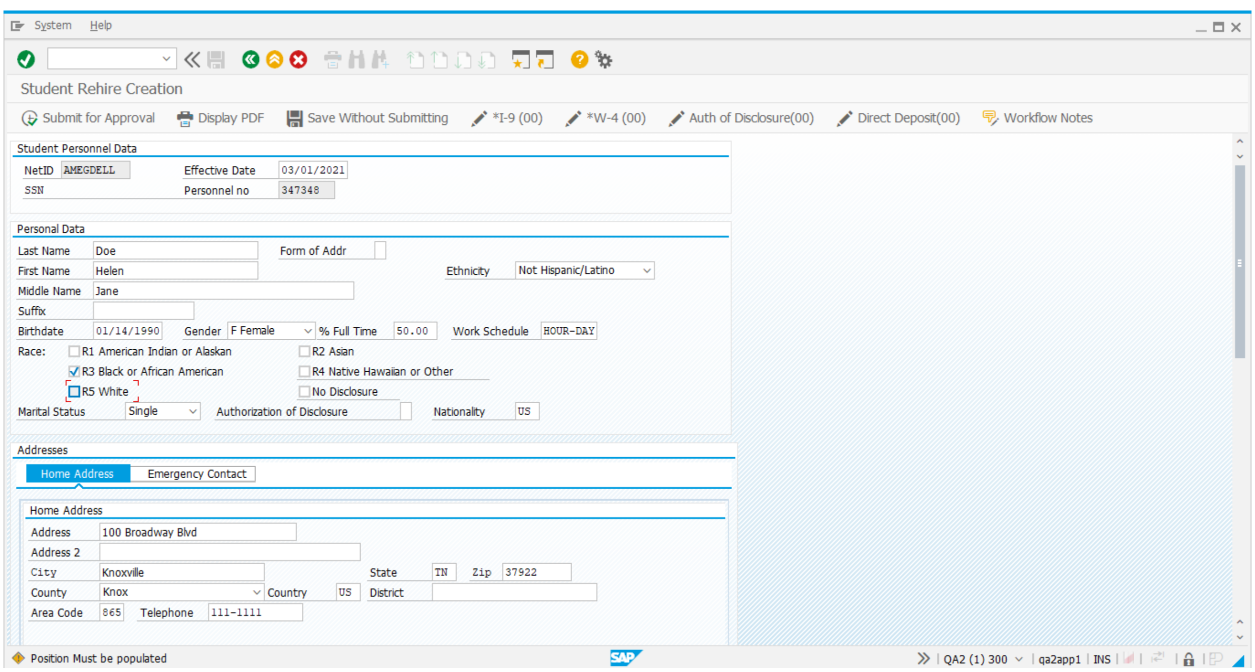
Once a form is approved by HR, the originator of the work item will receive an email notifying them that the employee has been successfully hired and it will include the student's personnel number.

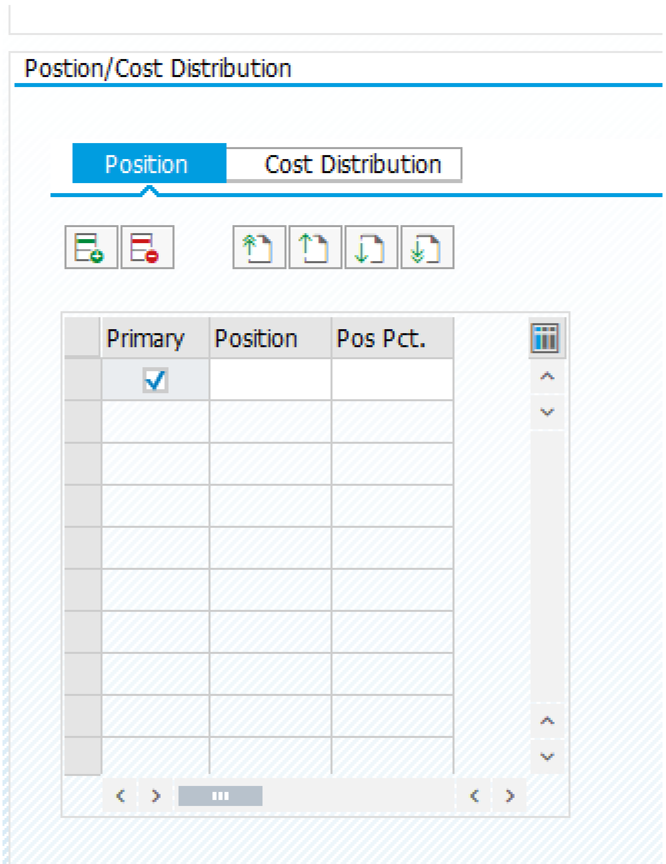


REHIRES

The procedure for student rehires is much the same as for new hires. After inputting NetID, personnel number, and effective date into the “Student Selection” screen, the “Student Hire Creation” screen appears as in the example below. However now much of the student’s information pre-populates. This is an opportunity to make any corrections such as new address, phone, etc. and allows for new tax forms, direct deposit, and authorization forms (if applicable) to be attached. The procedures are the same as described.

The “Position/Cost Distribution” fields are left blank and must be filled before “Submit for Approval” is selected.




Postion/Cost Distribution
Position
Cost Distribution
Primary
Position
Pos Pct.