Add New Employee Pre-Employment Information

(For State and Research Foundation Employees)



Before you add a new employee to the database you must first go to the **Search Match** page and search the PS database to make certain that the person <u>does not already exist</u>.

The person that you are hiring may exist in the database already for the following reasons:

- They are an active, current employee at the University, UHMC or Long Island State Veterans Home
- They are a current or past student of the University
- They are a retired or terminated employee
- They are an "affiliate" of the University (i.e., volunteer, temporary worker, visitor, etc.)

Navigation to Search/Match:

Workforce Administration > Personal Information > Search for People

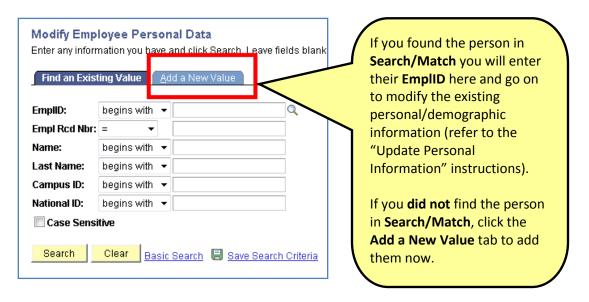
Employee Personal Data

The **Employee Personal Data** component is used to record the new employee's personal and demographic information as well as certain "pre-employment" information required by Human Resource Services and other areas that issue ID Cards, Library access and computer accounts. You must complete this information for **all new State and Research Foundation employees**.

You will obtain this information from the *Demographic Form* that the new employee completed.

Navigation:

SBU > SBU Human Resources > Use > Employee Personal Data





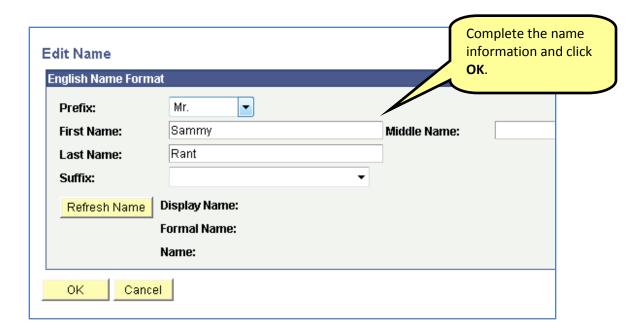
Leave **NEW** in the **EmplID** field and click **Add**.

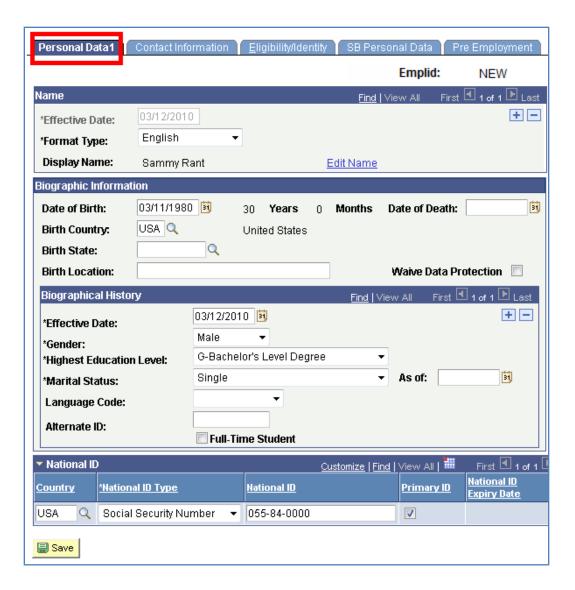
A new **EmpliD** number will be assigned after you enter and save all of the required information. The EmpliD is the **Stony Brook ID** number that will appear on the employee's ID Card.

Click the Personal Data 1 tab

The **Effective Date** will default to the today's date.







Biographic Information:

Enter the Date of Birth (mmddyyyy).

Select the **Birth Country**.

Biographical History:

In the Effective Date field, enter the employee's hire date. You cannot enter a future date. If the hire date is in the future then leave today's date.

Select the **Gender**.

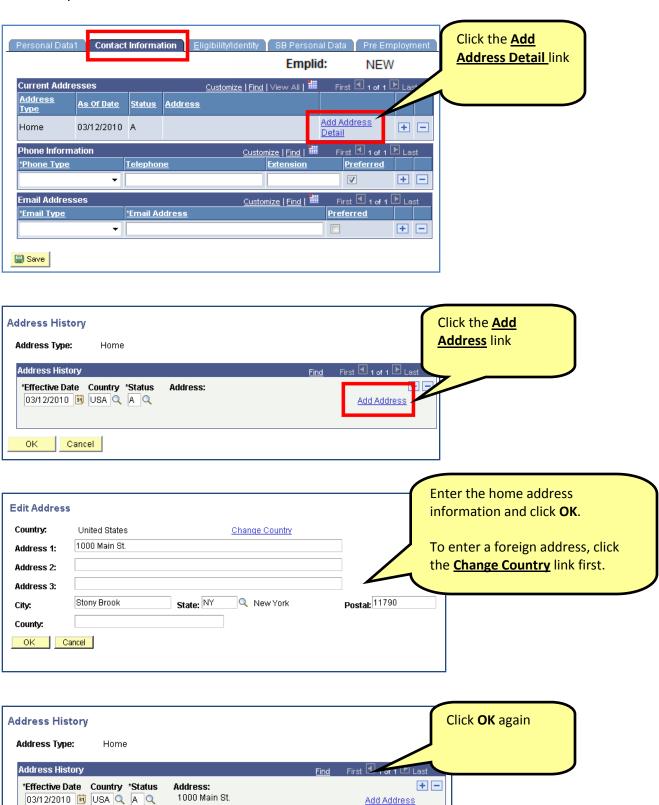
Select the Highest Education Level.

Select the Marital Status.

Enter the National ID (Social Security Number).

Click the Contact Information tab

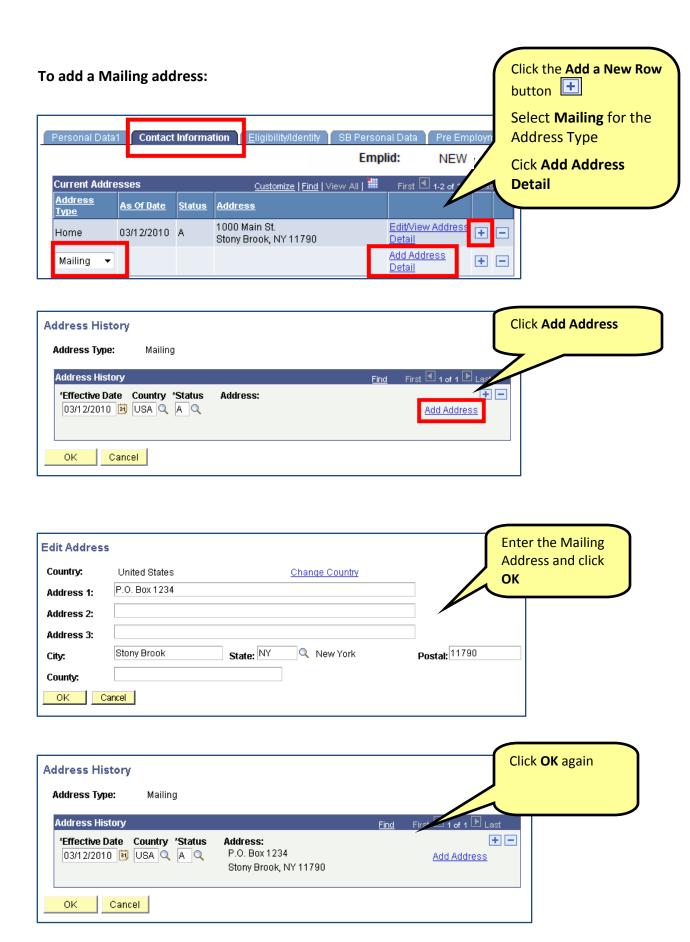
Enter the person's Home Address:

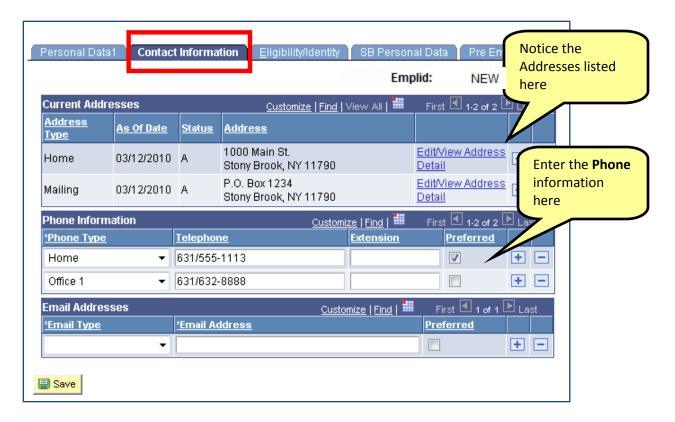


4/22/2010

Stony Brook, NY 11790

Cancel





Enter the Phone Information:

Select **Home** for the **Phone Type** and enter the complete telephone number including area code.

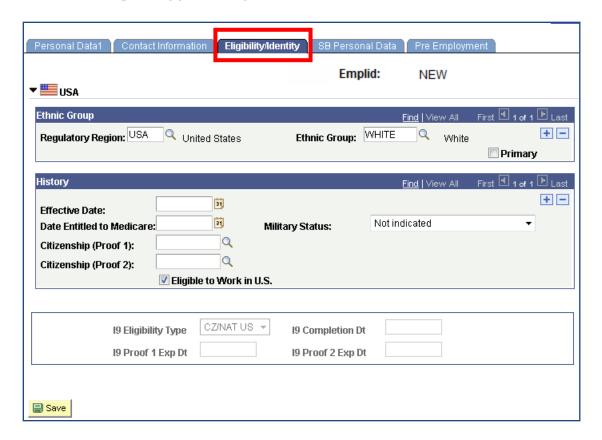
Select the **Preferred** option.

Office Phone is also required. To add it, click the **Add a new row button** and choose **Office 1** as the **Phone Type**.

De-select the **Preferred** option if selected. Only one phone type should be marked as **Preferred**.

The **Campus Email** information will be populated automatically. Add the home/personal email if known.

Click the Eligibility/Identity tab

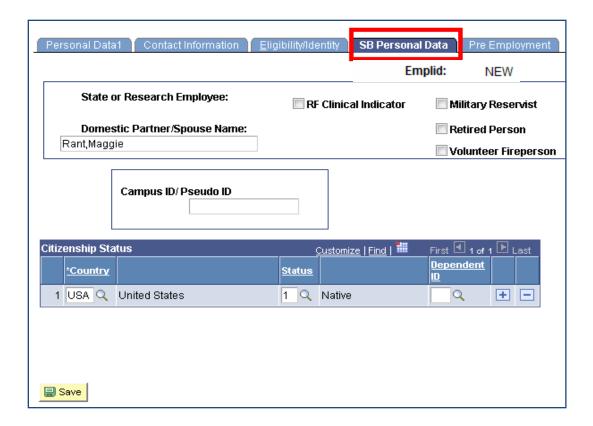


Select the **Ethnic Group.**

Select the Military Status.

19 Information will be completed by HRS staff.

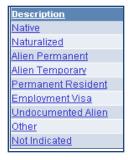
Click the SB Personal Data tab



Enter the **Domestic Partner/Spouse Name**.

Under Citizenship Status, select USA as the Country.

Then select the person's **Status** in this country. This will be **Native** for US Citizens and for Non-US Citizens it will be one of the other options in the list:

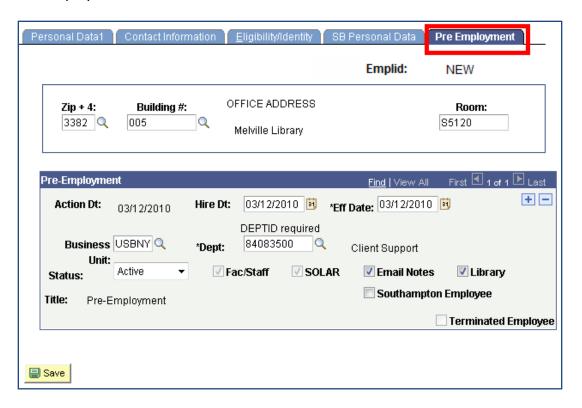


If this is a Non-US citizen, click the **Add a new row** button and select the person's **Country** of citizenship. Then select **Native** for the **Status** in that country.

If the person doesn't have a Social Security Number and they've been assigned a temporary USB number enter it in the **Campus ID/Pseudo ID** field. Otherwise, leave this field blank.

Click the Pre-Employment tab

The information on this page must be completed for all <u>new</u> State and Research employees. It is also used to facilitate getting an ID Card (not a Badge), SOLAR account, Notes email account and Library access for employees **BEFORE** the hire process is completed by HR. This can be done by making the **Effective Date** <u>up to 70 days before</u> the employee's hire date.



Enter the Office Address information.

Enter the Hire Date.

Enter the **Eff Date** - this is the date that you want this pre-employment information to become effective. This date can be <u>today's date</u> or <u>up to 70 days BEFORE</u> the employee's hire date for those employee's who need to obtain an ID Card, SOLAR account, Notes email account and/or Library access early. <u>Do not enter</u> a date earlier than today!

Select the Business Unit – RSFND (for Research) or USBNY (for State).

Enter the **Dept ID** (6-digit budget account code followed by 2 zeros).

Status should default to **Active** when adding a new employee. It will automatically be changed to **Inactive** once the Hire process is completed by Human Resources.

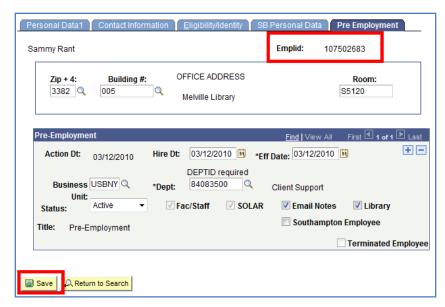
If the employee needs **Email Notes** or **Library** access select these options.

The Fac/Staff and SOLAR indicators will be turned on when you enter the Dept ID. This information is used to indicate that the new employee needs an ID Card and SOLAR account.

If this is a **Southampton employee** select this option.

You will only **Add a New Row (+)** if you need to change any of this information after it is entered and saved. Remember to add the **Effective Date** if you do make a change!

Save the Employee Personal Data



Once you've entered all of the required information on the pages in the **Employee Personal Data** component click the **SAVE** button.

Notice that the new employee has been assigned a **EmplID** (**Stony Brook ID**) number.

Now go ahead and complete the **Person Profile** page, **Emergency Contact** page, and the **Office Address** page.

And then Print the Hire Form, complete it and submit for the necessary approvals.

The person's status in PeopleSoft will still be "Non-employee" until HR receives the paperwork and completes the hire in PeopleSoft.

Emergency Contact

Navigation:

SBU > SBU Human Resources > Use > Emergency Contact



Enter the Contact Name.

Select the **Relationship to the Employee**.

Indicate whether this is the **Primary Contact** by checking this box.

Enter the **Address** and home **phone** information. If this is the same as the employee's home address/phone just click the box "**Same Address and Same Phone as Employee**" and the information will fill in.

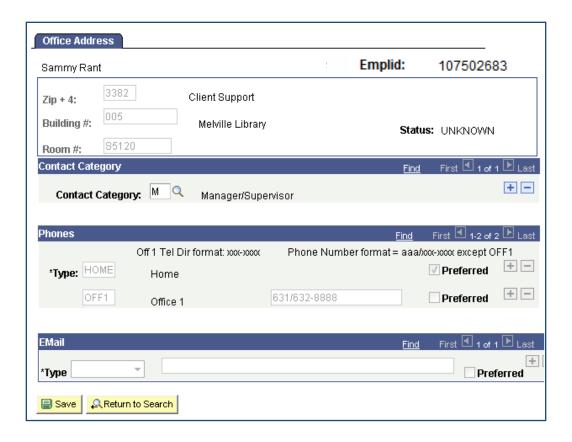
If the contact has other phone numbers that you'd like to record, click the **Other Phone Numbers** tab and complete that page. You can add as many phone numbers as you'd like on this page by clicking the **Add a New Row (+)** button.



Office Address

Navigation:

SBU > SBU Human Resources > Use > Office Address



The office address will default from the information that you entered on the **Pre-employment** page.

If applicable, select the **Contact Category** (i.e., Assistant to Chair, Essential Personnel – Snow, Manager/Supervisor, etc.).

<u>Do not enter</u> email information. The campus email will be filled in automatically for all employees.



Add Education

The **Person Profile** page is used to track *Education*, *Licenses/Certifications* and Languages. Department users <u>can only add this information for new employees</u> (who do not have a job record in PeopleSoft yet). To update this information for existing employees, contact Human Resource Services.

Navigation:

SBU > SBU Human Resources > Use > Person Profile



Enter the information provided on the *Demographic Form* or as it appears on the *diploma*:



Select the **Degree.**

Enter the **Country.**

Enter the State.

Select the **Major Code.**

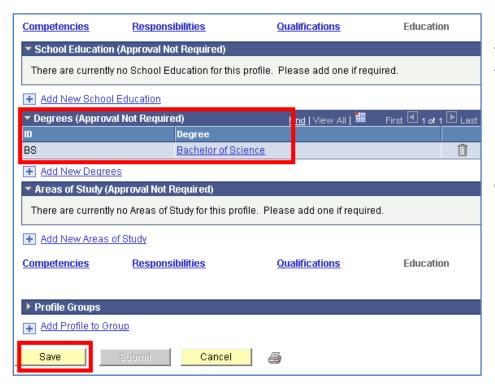
Select the **School Code.**

Enter the **Year Aquired.**

Select the **Graduated** checkbox.

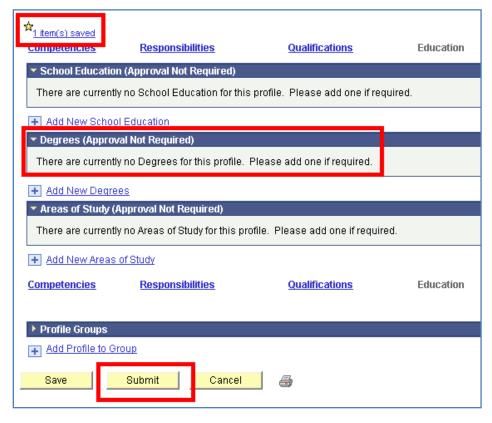
(If entering more than one Degree, click Apply and Add Another).

Click OK.



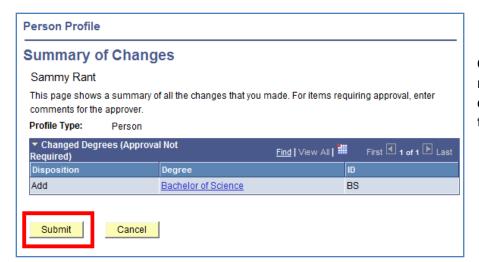
You will see the Degree listed here but it will not be posted until it is submitted.

Click Save.

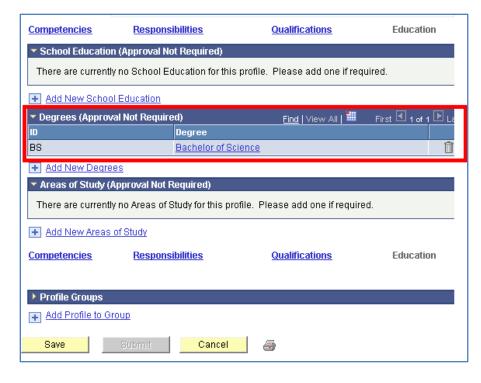


Notice that the Degree is saved but <u>not</u> <u>posted</u> to the Person Profile yet.

You must click **Submit** to post it.



Click **Submit** one more time to complete the transaction.



Now the Degree is now posted to the Person Profile.

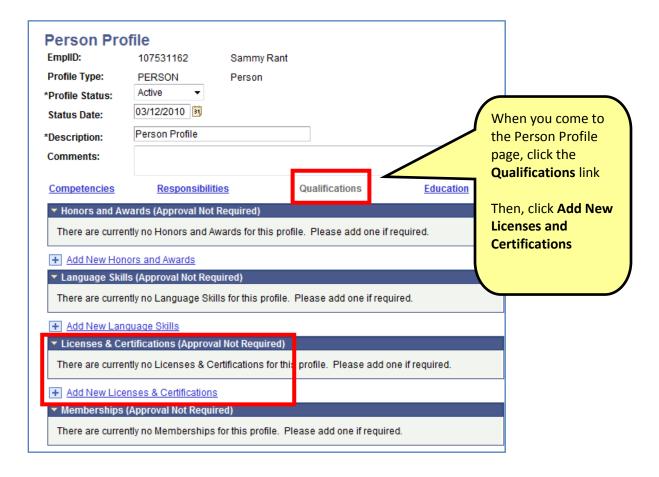
If you made an error and need to delete the degree click the delete button (the trash can).

Licenses and Certifications

The **Person Profile** page is used to track *Education, Licenses/Certifications* and *Languages*. Department users <u>can only add this information for new employees</u> (who do not have a job record in PeopleSoft yet). To update this information for existing employees, contact Human Resource Services.

Navigation:

SBU > SBU Human Resources > Use > Person Profile



Enter the information provided on the Demographic Form or as it appears on the License/Certification:



Select the License.

Select the Country.

Select the State.

Enter the **Expiration** Date.

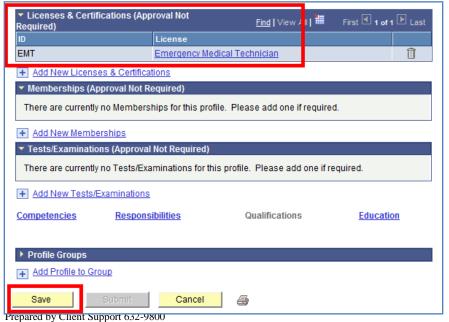
Enter the Issue Date.

Enter the **License/** Certification Number.

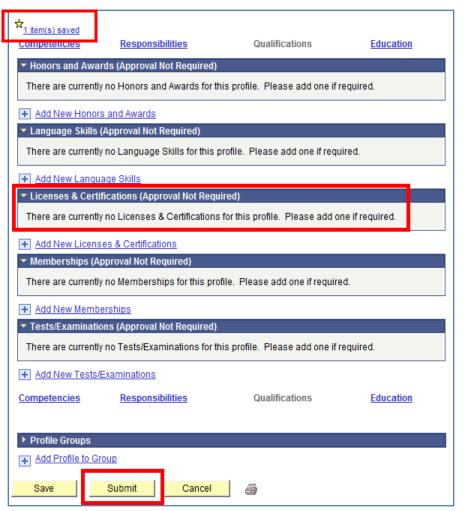
Enter the **Issued By** information.

(If entering more than one License/ Certification, click **Apply and Add** Another).

Click OK.

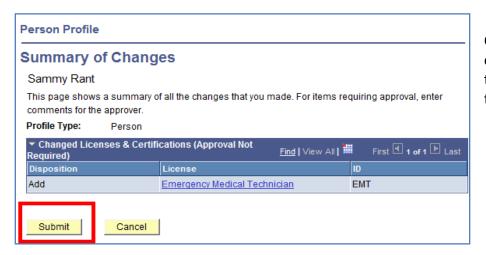


You will see the License/Certificati on listed here but it will not be posted until it is submitted.

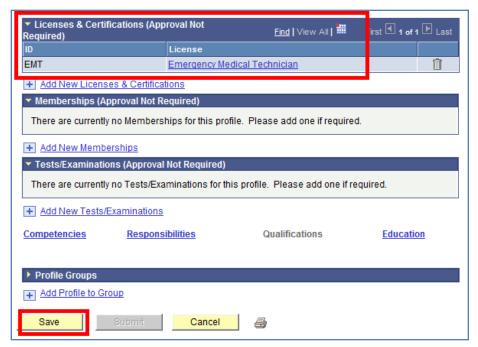


Notice that the License/
Certification was saved but <u>not</u> <u>posted</u> to the Person Profile yet.

Click **Submit** to post it.



Click **Submit** one more time to complete the transaction.



Now the License/
Certification is now posted to the Person Profile.

If you made an error and need to delete the degree click the delete button (the trash can).

Languages

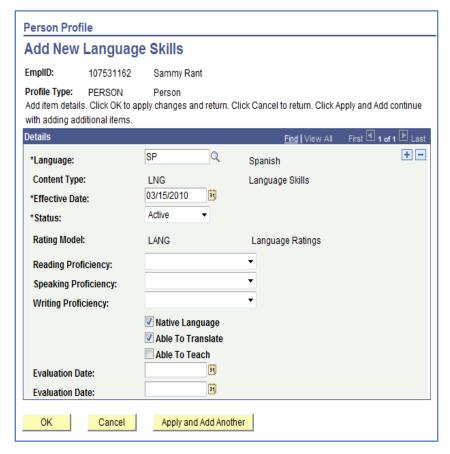
The **Person Profile** page is used to track *Education, Licenses/Certifications* and *Languages*. Department users <u>can only add this information for new employees</u> (who do not have a job record in PeopleSoft yet). To update this information for existing employees, contact Human Resource Services.

Navigation:

SBU > SBU Human Resources > Use > Person Profile



Enter the information provided on the *Demographic Form*:

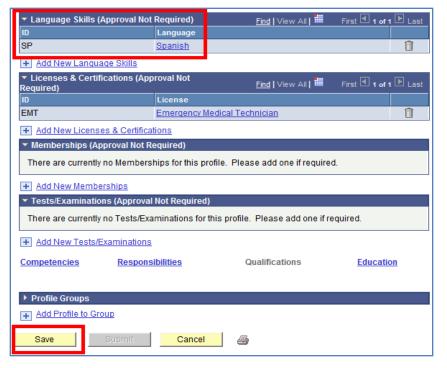


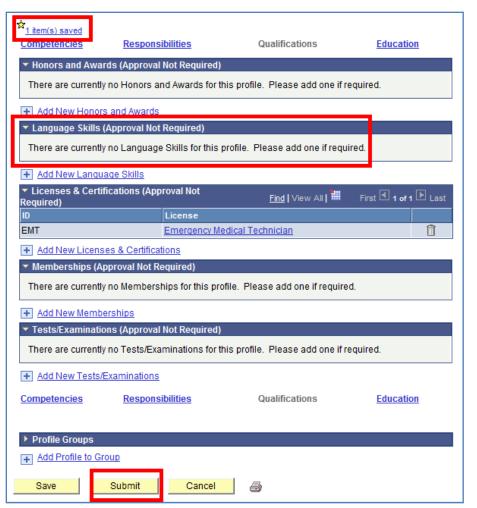
Select the Language.

Enter additional information if known.

(If entering more than one Language, click **Apply and Add Another**).

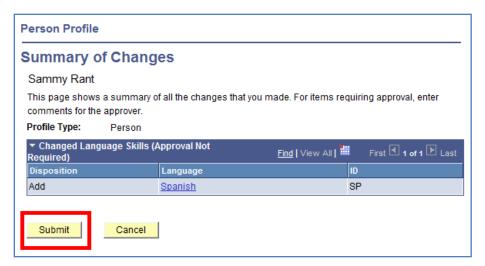
Click OK.



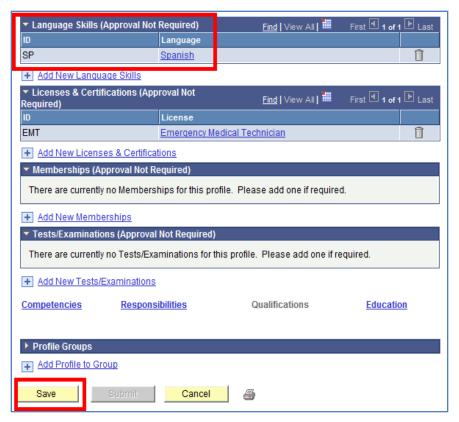


Notice that the Language was saved but <u>not</u> <u>posted</u> to the Person Profile yet.

You must click **Submit** to post it.



Click **Submit** one more time to complete the transaction.



Now the Language is posted to the Person Profile.

If you made an error and need to delete the degree click the delete button (the trash can).