

# TEMPLATE-BASED HIRE INSTRUCTIONS - HR APPROVERS

Template-Based Hire (TBH) in the HCM system gives HR Approvers the ability to review and approve new hire information entered by department HR Preparers. It also provides Approvers with the ability to electronically return incorrect hire requests to Preparers for revisions.

## Groundwork:

The system sends an email to the department Approver about the hire transaction after the Preparer completes and submits the TBH transaction. The Preparer also receives a copy of the email. It includes the following information:

- Individuals Name
- Department Number
- Sequence Number
- Status
- Action
- Link to Access Request
- Navigation Information.

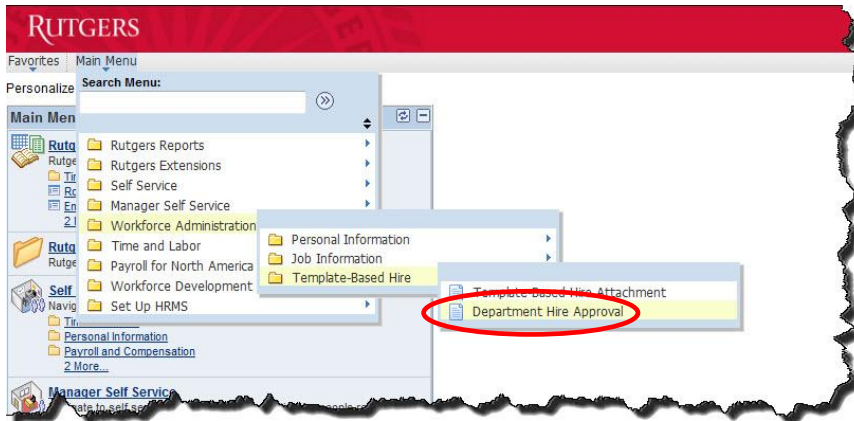
*Note: Sometimes the link in the email does not work because some email platforms are incompatible with Oracle/PeopleSoft. When the link does not work, the Approver can use the navigation information provided in the email and noted on the next page of this document.*

# TEMPLATE-BASED HIRE INSTRUCTIONS - HR APPROVERS

## Step-by-Step Instructions:

### Navigation:

**Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval**



**Step 1:** If you have new hires to review and approve, they will display on the “**Pending Approval**” screen. Click on the name of the person you want to approve.



# TEMPLATE-BASED HIRE INSTRUCTIONS - HR APPROVERS

**Step 2:** The “**HIRE APPROVAL PAGE**” for the employee you selected will appear. Click on the “**New Hire Attachments**” link to open a copy of the Offer Letter and any other supporting documents that may be attached. Compare the information in the letter and supporting documents to the data entered into the system by the Preparer.

**RUTGERS**

Favorites Main Menu > Workforce Administration > Template-Based Hire > Department Hire Approval

## HIRE APPROVAL PAGE

[New-Hire Attachments](#) Template Sequence: 48001

Personal Information					
Name:	Howard Wolowitz	Empl ID:	NEW	Empl Rcd:	0
Address 1:	231 North Los Robles Ave.	Social Security Nbr:	222-66-9876		
Address 2:		Date of Birth:	04/28/1972	Gender:	Male
City:	Pasadena	Home Phone:	848-999-6543		
State:	NJ	Postal:	87654	Mobile Phone:	
Email:	hw_aero@bbt.com	Business Phone:			

Job Information									
Hire Date:	01/01/2013	Action:	Hire	Action Reason:	New Hire				
Entry Date:	01/01/2013	Job End Date:		Empl Class:	1-Salaried	Salary Grade:	08	Step:	
Reg/Temp:	Regular	Full/Part Time:	Full-Time	Standard Hours:	37.50				
Job Code:	31317	Job Title:	DIR OF DEVELOPMENT						
Department:	10330	SAS - English							
Location:	3000 005	Queens Building Rm 005							
Supervisor ID:									
Union Code:	006	Admin Assembly (MPSC)	Pay Group:	S01	Salary 12/12				
Comp Freq:	A	Annual	FICA Status:	Subject	Salary Admin Plan:	Y375			
Rate Code:	NAANNL		Employee Type:	S	FLSA Status:	Exempt			
Comp Rate:	\$65,321.000000		Tax Location Code:	NJ001	New Jersey				

Citizenship & Non-Resident Visa/Permit Information					
US Citizen:	Yes	Permanent US Resident:	No	Country of Residence:	USA
Visa/Permit Type:		Date of Entry into Country:		Status Expiration Date:	
Visa Permit Status:		Status Date:			

Comments

**Step 3:** If the information on the “**Hire Approval Page**” matches what is specified in the Offer Letter, is compliant with Federal and State laws, university policies, relevant bargaining unit contracts, your school or decanal unit’s rules and guidelines, and is aligned with what you know about the offer, then click on the “**Approve**” button.

# TEMPLATE-BASED HIRE INSTRUCTIONS - HR APPROVERS

**Step 4:** If something on the screen does not match or is not compliant, click in the “**Comments**” box and type information about the error or issue into the box for the Preparer. When done, click on the “**Return to Dept Preparer**” button to route the hire transaction back to the Preparer for revisions.

The screenshot shows a web-based form for hire transactions. At the top, there are fields for State Code (NAANNL), Employee Type (S), FLSA Status (Exempt), Comp Rate (\$65,321.000000), and Tax Location Code (NJ001, New Jersey). Below this is a section titled "Citizenship & Non-Resident Visa/Permit Information" with fields for US Citizen (Yes), Permanent US Resident (No), and Country of Residence (USA). Further down are fields for Visa/Permit type, Date of Entry into Country, Status Expiration Date, and Visa Permit Status. The "Comments" field is highlighted with a red circle and contains the text: "Please correct the salary to match the amount in the offer letter - \$65,123.00." At the bottom of the form, there are two buttons: "Approve" and "Return to Dept Preparer", with the latter also highlighted by a red circle.

## Workflow & Next Steps:

If you return the transaction to the department Preparer for changes, the system sends an email to the Preparer and routes the transaction back to the Preparer who then:

- Makes the changes.
- Adds notes into the “**Comments**” field for the Approver – below any existing notes so not to overwrite them – regarding the changes made.
- Selects the blank in the “**Template Complete**” drop-down list to reset the value to “**Yes**” and activate the “**Save and Submit**” button.
- Clicks on the “**Save and Submit**” button to send the hire transaction back to the Approver for review.

The Approver then, reviews the hire transaction again and either approves it or enters additional comments under any existing ones and sends it back to the Preparer for additional changes.

Once approved, the system automatically routes the hire transaction to the HCM Unit, Academic Labor Relations, or directly to the HCM database for processing.

After the TBH is processed, the system automatically sends a workflow email to the Approver to review and adjust the commitment accounting, if necessary.