On-Boarding Process, On-Boarding Forms, Hire Dates, and New Employee Orientation

March 2015
Agenda

• On-Boarding Process
• On-Boarding Forms
• Types of Employees
The On-Boarding Process
Who’s Responsible for Whom?

Office of Human Resources Centralized On-Boarding:
1. Benefited Employees
2. Post Doctoral Fellows
3. Graduate Students on Contract

HR Liaisons Departmental Responsibility:
1. Miscellaneous Wage Employees
2. Adjunct Faculty and Supplemental Professionals
3. Undergraduate Students
4. Graduate Student Labor (not on Contract)
5. Non-Paid Employees (Adjuncts)
You’ve Hired Someone- Next Steps

• As soon as you know you are hiring someone, you should kick off the Hiring Notification Form
  – If this employee is hired through the RTR process, the CBC is initiated in that process
  – A US Citizen or Permanent Resident cannot start working until the CBC has been Cleared
  – Foreign nationals can start working once you have submitted the Hiring Notification Form

• You can send the employee the on-boarding link to start completing their forms as early as possible.
  – Once they have an ID#, you can request an email be set-up through access@udel.edu.
What can new employees do before their On-Boarding session with HR or their Department?

1. All Employees can complete the following forms:
   a. Quick Bio (if they don’t already have a UD ID #)
   b. Employee Demographic Data Form (EDD)
   c. W-4 Form
   d. Direct Deposit Form
   e. Bayh-Dole Act-Agreement to Assign

2. All Employees Can collect documentation needed for appointment

3. All Employees can prepare any questions for HR or their Department
On-Boarding Forms
New Employees visit the onboarding website to begin the New Hire Process.

If the employee is a rehire or a student they would start at the “Log In” link.

If the employee has never been in our HR System and is not a student they would start at the “Start Here” link.
The Quick Bio captures basic information in order to create a UD ID and pin in the Student System.

Note: All UD employees must first have a UD ID in the Student System before being added to the Payroll system.

E-mail is optional and if entered, would be a new employee’s personal e-mail. A new employee cannot enter their UD e-mail address because e-mail access as well as the ability to receive a UD ID Card continues to be an overnight process.
The new hire can call Human Resources to learn about their UD ID and to change their pin if they are not on campus. If they are in Human Resources completing the Quick Bio, Human Resources has the ability to help the person change their pin. If the new employee is with a departmental liaison, please call Human Resources at (302) 831-8677 to have their pin changed.
The second step of the Quick Bio is where the new hire will set their pin. The employee will move forward by clicking Next Step.
If the new hire does not exist in the Student System, they will go to the next page which will display their new UD ID.

In order for the new hire to return to the main menu, they need to close the Quick Bio window by selecting the “X” in the top right hand corner.
The next step for the new hire will be to Log in with their new UD ID and Pin. The link on the menu page will take the new hire to the CAS Login Screen.
The new hire will need to enter their UD ID that they received at the end of the Quick Bio and their pin. Once they have entered their ID and pin and selected Submit, they will see the on-boarding menu page.
The next step is for the new hire to “Tell Us About Yourself”. This link will take the new hire to the Employee Demographic Data Form (EDD).

The EDD is the same form for both NEW and EXISTING employees.

- **Tell us about yourself**
  Complete your demographic and biographical employee record.

- **Complete your W-4**
  Specify your payroll deposit account
  Have your checking account information ready. All UD paychecks are directly deposited to your bank account.

- **Select your additional tax withholdings**
  Optional

- **Bayh-Dole Act**

- **Voluntary Self-Identification of Disability**
  Optional

- **I-9 Form**

**LOG OUT**
Important! To protect your personal information, be sure to log out and close your web browser when you are done accessing services that require authentication.
• The first page of the EDD requires the new hire to enter their Employee ID which is their UD ID that they received at the end of the Quick Bio.
• The second page will have fields populated with any information that was captured from the Quick Bio such as address. The fields are editable if the new hire notices an error or needs to make a change to their data.

• Rehires will have an additional question at the top asking if they are a Rehire. They should choose Yes.
The third page will have fields populated with any information that was captured from the Quick Bio such as date of birth and gender.
• On the fourth page, the new hire needs to indicate their Highest Education Level and school information if applicable. This information will update Peoplesoft in Human Resources.
• To add a degree one must select Add a degree and enter the required information. After entering the information one needs to select Submit. The information will then appear in the section below called Changes requested.
• In order to change or cancel this information there are cancel and change buttons.
• You will see this add, edit and delete feature on the next several pages.
• Note: If an unknown school is chosen, you must enter the actual name of the school in the comments of the EDD form.
On the fifth page, the new hire has the opportunity to enter language information. This information is not required, but if entered will update Peoplesoft in Human Resources and Grants.
On the sixth page, the new hire has the opportunity to enter licenses and certificates. This information is not required, but if entered will update PeopleSoft in Human Resources.
• On the seventh page, the new hire can enter any honors and awards. This information is not required, but if entered will update PeopleSoft Grants.
• On the eighth page, the new hire has the opportunity to enter any membership information. This information is not required, but if entered will update PeopleSoft in Human Resources and Grants.
• On the ninth page, the new hire has an opportunity to enter publication information. This information is not required, but if entered will update PeopleSoft Grants.
• On the tenth page, the new hire has the opportunity to enter information regarding lectures. This information is not required, but if entered will update Peoplesoft Grants.
• On the eleventh page, the new hire can enter collaborations. This information is not required, but if entered will update Peoplesoft Grants.
On the twelfth page, the new hire has the opportunity to enter prior work experience. This information is not required, but if entered will update PeopleSoft in Human Resources and Grants.
• On the thirteenth page, the new hire can enter keywords. This is not required, but if entered will update PeopleSoft Grants.
• On the fourteenth page, a new hire can enter information regarding advisors and advisees. This information is not required, but if entered will update PeopleSoft Grants.
• On the fifteenth page, a new hire can enter information on the Experts page. This is not required, but if entered will update the Experts Database used by the Office of Communications & Marketing.
• On the sixteenth page, the new hire will select Finish & Submit. New Hires completing the Employee Demographic Data form will be routed directly to HR.
The new hire is now at their web forms In Basket and in order to return to the Main Menu, they need to close the window by selecting the “X” in the top right hand corner.
• You will notice that a check mark appeared next to “Tell Us About Yourself” to indicate that the Employee Demographic Data form has been completed.
• The next step is for the new hire to complete their W-4.
If employee lives in MD, they can opt to have MD Taxes withheld (not required)

Note: an employee cannot put exemptions in both the Single and Married exemption fields
Note: There is an online link to a W-4 Tax Worksheet to help the employee determine their exemptions.
• This form includes an electronic signature feature titled Certification. The employee must agree to the certification by choosing “I agree” from the drop down box and then must type their name as it appears at the top of the form.

• Select Finish and Submit.

• After selecting Finish and Submit, the new hire will need to close the W-4 window by selecting “X” in the top right corner to return to the New Employees Main Menu.
For a Rehire, the W-4 displays the Date of the Last Change and the prior tax elections. The form has a field asking for the date the change will take effect.

The “date change will take effect” on the W-4 must be today’s date plus at least one day.
You will now notice that a second check mark appeared beside the W-4 to indicate that it has been completed.
The new hire can now complete the Direct Deposit form by selecting “Specify Your Payroll Deposit Account.
An employee can add multiple accounts for direct deposit.

In this example if an employee wants to add a third bank account, they would select “Add Line” and the appropriate fields would display for them to enter their information. If a bank account line needs to be removed, the employee would select the delete Action.

Note: If a bank is not currently on file, the employee will need to contact Payroll, (302) 831-8677.
• This form includes an electronic signature feature titled Certification. The employee must agree to the certification by choosing “I agree” from the drop down box and then must type their name as it appears at the top of the form.

• Select Finish and Submit.

• After selecting Finish and Submit, the new hire will need to close the Direct Deposit window by selecting “X” in the top right corner to return to the New Employees Main Menu.
• For a Rehire, the Direct Deposit displays the Date of the Last Change and their prior direct deposit information. They will still need to provide direct deposit backup even if nothing is changing.

• The “date change will take effect” on the Direct Deposit must be today’s date plus at least one day.

• Note: if they do not attach bank documentation this must be collected by the Department/HR when they meet with them.
• You will now notice that a third check mark appeared beside the Direct Deposit to indicate that it has been completed.
• The next step on the menu is Additional Tax Withholdings. This is optional.
• If the new hire does not choose to have Additional Tax Withholdings, they can proceed to the Bayh-Dole Act.
After selecting Finish and Submit, the new hire will need to close the Additional Tax Withholding window by selecting “X” in the top right corner to return to the New Employees Main Menu.
• You will now notice that a fourth check mark appeared beside the Additional Tax Withholdings to indicate that it has been completed.

• The next step on the menu is the Bayh-Dole Act.
•The Bayh-Dole defines the federal requirements regarding employees who engage in federally funded research and who must disclose any patentable inventions that have been conceived in connection with their work at the University.
The Bayh-Dole Act - Agreement to Assign states that the employee must disclose inventions conceived while doing sponsored projects at UD. All employees must sign this form.

After signing, Select Finish and Submit.

The new hire needs to select the “X” in the top right hand corner in order to return to the New Employees Menu.
• You will notice a check mark appeared beside the Bayh Dole Act to indicate that it has been completed.

• The Voluntary Self-Identification for Disability form is optional.

• Completion of this form is for benefited employees only. If they choose not to complete this form they can move on to the I-9 form.

• If any employee, benefited or non-benefited, has a need for reasonable accommodations please contact the Office of Disability Support Services (DSS).
• Employee would enter in their information.

• Email can be a UD email or personal email account.

• Click Next
• Employee would acknowledge one of the 3 options

• Employee would then type in their name and the date they are completing the form

• Then Submit the form

• Note: This form only goes to HR for reporting purposes. If any employee, benefited or non-benefited, has a need for reasonable accommodations please contact the **Office of Disability Support Services (DSS)**.

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### Why are you being asked to complete this form?

Because we do business with the government, we must reach out to hire, and provide equal opportunity to qualified people who have disabilities. To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we do hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier.

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### How do I know if I have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition.

Disabilities include, but are not limited to:

- Blindness
- Autism
- Deafness
- Cerebral Palsy
- Cancer
- HIV/AIDS
- Diabetes
- Schizophrenia
- Epilepsy
- Muscular dystrophy
- Bipolar disorder
- Major Depression
- Multiple sclerosis (MS)
- Missing Limbs or partially missing limbs
- Post-traumatic stress disorder (PTSD)
- Obsessive compulsive disorder
- Impairments requiring the use of a wheelchair
- Intellectual disability (previously called mental retardation)

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### Please choose one of the options below:

- **YES, I HAVE A DISABILITY** (or have previously had a disability)
- **NO, I DON'T HAVE A DISABILITY**
- **I DON'T WISH TO ANSWER**

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### Reasonable Accommodation

Federal law requires us to provide reasonable accommodation to qualified individuals with disabilities to ensure equal employment opportunity for all. If, because of your disability, you require a reasonable accommodation such as a change to application or work procedures, documents in an alternate format, sign language interpreter, or specialized equipment, please let us know.

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**Note:** This form only goes to HR for reporting purposes. If any employee, benefited or non-benefited, has a need for reasonable accommodations please contact the **Office of Disability Support Services (DSS)**.
• You will notice a check mark appeared beside the Voluntary Self-Identification for Disability to indicate that it has been completed.

• The I-9 will have to be printed. The employee can fill this out a head of time and then print or can complete this when they meet with the department/HR.
Employee Section

Make sure employee section is filled out in its entirety.

If Foreign National their I-9 would be completed with the Payroll Office

Two new optional fields

Employee must sign this form
Section 2. Employer or Authorized Representative Review and Verification

(As an employer or authorized representative, you must complete and sign Section 2 within 3 business days of the employee’s first day of employment. You must physically examine one document from List A OR examine a combination of one document from List B and one document from List C that is listed on the "List of Acceptable Documents" on the next page of this form. For each document you review, record the following information: document title, issuing authority, document number, and expiration date, if any.)

Employee Last Name, First Name and Middle Initial from Section 1: John Doe

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Document Title</td>
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<tr>
<td>Expiration Date (if any)</td>
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Certification

I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee’s first day of employment (mm/dd/yyyy): 04/25/2013

Signature of Employer or Authorized Representative: [Signature]

Date (mm/dd/yyyy): 04/21/2013

Title of Employer or Authorized Representative: Records Administrator

Last Name (Family Name): Snuffer
First Name (Given Name): Amanda
Employer’s Business or Organization Name: University Of Delaware - Records Mgmt

Employee’s Business or Organization Address (Street Number and Name): 413 Academy Street
City or Town: Newark
State: DE
Zip Code: 19716
I-9 Hints & Tips

- Print double-sided so that no pages are lost
- Always double check that an employee has entered their SSN on the form and has signed the form
- Unsigned Social Security Cards can be accepted
- Laminated Social Security Cards can be accepted
- Receipts for lost, stolen or damaged cards can be used
- Section 2 must be completed no later than 3 business days after the employee begins work
- Always complete section 2 fully
  - Enter all appropriate information, document title, issuing authority, document number, and expiration date. If the document does not have an expiration date put N/A
- Make sure to enter employee’s first day of hire
- Other Names Used, Email Address, Telephone Number if no information is entered the employee needs to put N/A
They are now done the online forms (the additional tax withholdings, voluntary self-identification of disability, and I-9 do not have to be checked off to move forward)
Job Data (New Hire) Form
and
On-Boarding Departmental Data Form
HR Liaisons will need to complete and submit this form to HR before the date of hire.

*** This is the same fields of information you would need to provide to another department that you request to do a JED to rehire someone from their department into your department.
• For I-9, when yes is chosen, a field called I-9 Date will appear and must be completed.
• An international new hire will go to the Payroll to complete their I-9 paperwork. Payroll gives completed I-9s to HR (Records Management) on a daily basis.
• For working papers, if yes is chosen a field called Working Papers Date will appear and must be completed.
• You must select a radio button for Position number or for Job Code. Once you have selected the appropriate button, a secondary field will appear. You must enter a corresponding Position number or Job Code.
Position Information

Job title: Student Work Class I (710200)
Check delivery: 2591 (lookup)
Supervisor: 401 (lookup)
HR liaison: 049 (lookup)
BTA group: (lookup)
Reports to position: (lookup)
Room: 201
Location: NC01 (lookup)
Department: 02591 (lookup)
Standard hours: 10
Salary admin. plan: UD Student, FICA Free (260)
Salary grade: (lookup)
FTE: (between 0 and 1.0)
0
Bargaining unit: None
Union seniority date: (use format mm/dd/yyyy)
• The FICA status field is a drop down with the options of Subject, Exempt, and Medicare Only. If Medicare Only is selected, proof is required that they are a Federal or Medicare exempt employee. All other new hire employees are Subject.
The Distribution section of the JED uses the Add Line feature.

- There is a drop down called “Earnings Distribution Type”. The choices in the drop down are By Amount, By Hour, By Percent and None.
  - By Amount is for SRGs, Post Doctoral Fellows and Graduates on Contract
  - By Hours is for BAFs and AFSCME
  - By Percent is not used
  - None is used for all other employees
• Forms for new hires processed by Human Resources (Benefited, Post Doctoral Fellows and Graduate Students on Contract) will route directly to HR.

<table>
<thead>
<tr>
<th>Role</th>
<th>Email address</th>
<th>Completed on</th>
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<tbody>
<tr>
<td>Originator</td>
<td>Deramo-Kolla, Elizabeth Ann</td>
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<tr>
<td>Copy</td>
<td>Maria Guse</td>
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</tbody>
</table>

• Forms for all other types of employees handled by HR Liaisons will route through departmental approvers as they do now.
Once the JED is approved by HR, the update process begins.

Behind the scenes, the JED will then collect the information from the EDD, W-4, Direct Deposit and Additional Tax to update Peoplesoft.
<table>
<thead>
<tr>
<th>Type of Employee</th>
<th>Definition</th>
<th>Who Does New Hire Job Data Form?</th>
<th>Who Does I-9?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate Student On Contract (Domestic)</td>
<td>Enrolled in a Graduate Program at the University of Delaware. Receiving a stipend &amp; tuition.</td>
<td>Human Resources</td>
<td>Department</td>
</tr>
<tr>
<td>Graduate Student not on Contract (Domestic)</td>
<td>Enrolled in a Graduate Program at the University of Delaware. Hired as Graduate Student Labor.</td>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Undergraduate Student (Domestic)</td>
<td>Enrolled in Undergraduate Courses at the University of Delaware.</td>
<td>Department</td>
<td>Department</td>
</tr>
<tr>
<td>International Graduate Student On Contract</td>
<td>Not a US Citizen. Enrolled in a Graduate Program at the University of Delaware. Receiving a stipend &amp; tuition. Must visit OISS.</td>
<td>Human Resources</td>
<td>*OISS</td>
</tr>
<tr>
<td>International Graduate Student Not on Contract</td>
<td>Not a US Citizen. Enrolled in a Graduate Program at the University of Delaware. Hired as Graduate Student Labor. Must visit OISS.</td>
<td>Department</td>
<td>*OISS</td>
</tr>
<tr>
<td>International Undergraduate Student</td>
<td>Not a US Citizen. Enrolled in undergraduate courses at the University of Delaware. Must visit OISS.</td>
<td>Department</td>
<td>*OISS</td>
</tr>
<tr>
<td>High School Student</td>
<td>Not enrolled in Graduate or Undergraduate courses at the University of Delaware. Need working papers if younger than 18 years old.</td>
<td>Department</td>
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<tr>
<td>Misc Wage/Non Student</td>
<td>Not a Student Worker. Hired for work performed at an hourly rate.</td>
<td>Department</td>
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</tr>
</tbody>
</table>

*OISS- Office for International Students & Scholars