On-Boarding

http://www.udel.edu/onboarding
Agenda

- On-Boarding Process
- Instructional Guide to NEW On-Boarding Forms (Part 1)
- Break
- Instructional Guide to NEW ON-Boarding Forms (Part 2)
- Break
- Funding for Positions
What is On-Boarding All About?

On-Boarding is a centralized process for new employees to complete all required paperwork with the goal of successfully integrating new employees into UD’s organizational culture with less stress and less errors.

What are the Benefits?

1. Consistent and effective process to welcome new employees to the University creating a positive first impression!
2. More timely entry into the Payroll and Benefit systems!
3. Less missed pay!
4. More efficient process with less duplication of effort!
5. Quicker process for Colleges and Departments to grant new employees access to systems and applications that utilize HR data for security!
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. Supplemental Faculty and Professionals
3. Undergraduate Students
4. Graduate Student Labor(not on Contract)
5. Non-Paid Employees(Adjuncts)
On-Boarding Welcome Packet Will be Mailed to Benefited Employees and Post Doctoral Fellows (the scheduled date of On-Boarding will be in this packet)

Graduate Students on Contract will have Online Welcome Information

- Check List
- Welcome Letter
- Local Maps
- Graduate Contract
- Additional Information
Current Dates for Group On-Boarding of Graduate Students on Contract set up by the Office of Graduate and Professional Education

July 15, 2009 – ELI/ITA, Perkins Student Center (Rodney Room), 8:30 a.m.
August 25, 2009 – Domestic Teaching Assistants, Trabrant Multi purpose Room A-C, 12:00 noon
August 27, 2009 – All Other New Graduate Students on Contract, Daugherty Hall in Trabrant, 8:30 a.m.

On these dates, HR will be partnering with college representatives to ensure students are On-Boarded in a timely manner.
What can new employees do before their On-Boarding session with HR?

1. Review the Welcome Packet
2. Complete the following forms:
   a. Quick Bio
   b. Employee Demographic Data Form (EDD)
   c. W-4 Form
   d. Direct Deposit Form
   e. Bayh-Dole Act-Agreement to Assign
3. Collect documentation as described on the Checklist
4. Prepare any questions for HR

Foreign Nationals must go to the Office of Foreign Students & Scholars upon arrival for I-9 processing
What will happen in HR?

1. New hire should arrive promptly at scheduled On-Boarding time.

2. If Quick Bio, EDD, W-4 or Direct Deposit are not completed, new hire should use an available KIOSK to complete forms.

3. Meet with the On-Boarding Coordinator to complete hiring documents.

4. Foreign Nationals must also meet with the Foreign National Coordinator to verify visa and residency status.

5. Benefited employees will meet with the Benefits Coordinator.
Quick View of On-Boarding

New Hire receives Welcome Packet

New Hire completes Quick Bio and Web Forms

New Hire arrives at scheduled On-Boarding appointment

Benefited New Hire attends New Employee Orientation (NEO)

New Hire is ready to be paid!!
The link for this web page will be included in the new hire’s Welcome Packet.

The web site also contains additional information for HR Liaisons.
• HR Liaisons will need to complete and return this form to HR before the date of hire.

• This form contains information that HR Liaisons use to complete on the New Hire JED. In order for HR to complete the New Hire JED this information is required.
The link to the menu page will be included in the Welcome Packet for new hires if they wish to complete this at home. We will also make this the home page on the kiosks in Human Resources.

A new hire will begin by selecting “Start Here”.

- The link to the menu page will be included in the Welcome Packet for new hires if they wish to complete this at home. We will also make this the home page on the kiosks in Human Resources.
- A new hire will begin by selecting “Start Here”.

Start here
Enter brief personal information to establish an employee ID and PIN.

Log in with your new UD ID and Pin
...to complete your employee record. (help)
• 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 in their UD e-mail address because e-mail access continues to be an overnight process as well as the ability to receive a UD ID card.
The second step of the Quick Bio is where the new hire will set their pin. If the new hire already exists in the Student System the following message will appear.
• The new hire can call the Registrar’s office 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, we will have the ability to help the person change their pin. If the new employee is with a departmental liaison, please call the Registrar’s office at (302) 831-2132 to have their pin changed.
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 return to the 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.
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.
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. Changes for existing employees will continue to be routed through the employee’s supervisor as they are today.
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.
The W-4 is a new web form which will be used for new hires as well as changes for current employees. This will replace the current paper form.
Note: There is an online link to a W-4 Tax Worksheet to help the employee determine their exemptions.
• This form includes a NEW 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.

• Standard web form routing gives one the ability to add additional approvers. Additional approvers are NOT required for the W-4.

• 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.
Once Payroll has approved the W-4 and the employee has received their copy, a printer friendly version is available.
• The change W-4 displays the Date of the Last Change and the current tax elections. The form has a field asking for the date the change will take effect.

• If the Date of Last Change is prior to today’s date, the effective date on the W-4 must be today’s date plus at least one day. For example, if the Date of Last Change is December 31, 2008, my W-4 effective date must be today plus at least one.

• If the Date of Last Change is a future date, the effective date on the W-4 must be the Date of Last Change plus at least one day. For example, if the Date of Last Change is August 1, 2009 my W-4 effective date must be August 2, 2009 or later.

• Standard web form routing gives one the ability to add additional approvers. Additional approvers are NOT required for the Change W-4.
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.”
The Direct Deposit is a new web form which will be used for new hires as well as changes for current employees. This will replace the current paper form.

There is a new feature in many of the web forms called “Add Line.” This feature was developed by IT to save space on web form pages.

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 with Payroll, the employee will need to contact Payroll.
This form includes a NEW 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.

- Standard web form routing gives one the ability to add additional approvers. Additional approvers are NOT required for the Direct Deposit.
- 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.
The change Direct Deposit displays the Date of the Last Change and the direct deposit information. The form has a field asking for the date the change will take effect.

- If the Date of Last Change is prior to today’s date, the effective date on the Direct Deposit must be today’s date plus at least one day. For example, if the Date of Last Change is December 31, 2008, my Direct Deposit effective date must be today plus at least one.

- If the Date of Last Change is a future date, the effective date on the Direct Deposit must be the Date of Last Change plus at least one day. For example, if the Date of Last Change is August 1, 2009, my Direct Deposit effective date must be August 2, 2009 or later.

- Standard web form routing gives one the ability to add additional approvers. Additional approvers are NOT required for the Change Direct Deposit.
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 Memo.
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 – Memo.
The Bayh-Dole Memo 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.

After reading the memo, the new hire needs to select the “X” in the top right hand corner in order to return to the New Employees Main Menu.
• There is now a check mark next to the Bayh-Dole Act Memo to indicate that the memo has been opened and read.

• The next step is for the new hire to print and then sign the Bayh-Dole Act – Agreement to Assign. The new hire must bring this form to Human Resources.
The Bayh-Dole Act Agreement to Assign states that the employee must disclose inventions conceived while doing sponsored projects at UD. All employees must print and then sign this form.

After printing the form and signing it, the new hire needs to select the “X” in the top right hand corner in order to return to the New Employees Menu.

This form must be brought by the new hire to UD.
There is now a checkmark next to the Bayh-Dole Act – Agreement to Assign. The new hire can now log out of the menu.

If the new hire has completed these forms prior to arrival at UD, the forms will “wait” in a holding tank until an HR representative approves them. This could be the On-Boarding Coordinator at a scheduled session or the HR Analyst after a department has submitted the Job Data Form. It will depend on what type of employee is being hired.
• The new search feature allows you to search on multiple fields.

• Only one field needs to be completed to use the search.

• When the search is performed it now uses “contains” instead of “begins with”. This will bring back more results.
• When I entered marketing in the description this was the result.
• Note that it now lists the number of results returned “Results 1-10 of 19”.
• In order to see additional results, you will need to select the numbers in the top right hand corner.
HR JOB DATA (JED)
If the Employee Group selected is Grad on Contract, a new field will appear. The Req ID of the graduate contract web form when entered will link to the Grad Contract and Grad Funding Forms to provide the contract dates and funding information for the new hire.
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 Office of Foreign Students & Scholars to complete their I-9 paperwork. OFSS will send completed I-9s to HR 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.
Bargaining Unit used to be a yes or no field. Now you must choose an option.

- UD Chapter AAUP – Full Time Faculty
- Local 3472 – Members of AFSCME Local 3472
- Local 43 – Members of AFSCME Local 439
- None – All other employees
The FICA status field is now 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.
There is a new 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 Doctorate Fellows and Graduates on Contract
- By Hours is for BAFs, AFSCME
- By Percent is not used
- None is used for all other employees

The Distribution section of the JED is now incorporating the feature of Add Line.
Step 1: Enter the Earnings Code, SpeedType, Class, User field (if applicable) and the Amount.

Step 2: Select Add Line.
- Step 3: Enter the Account
Forms for new hires processed by Human Resources (Benefited, Post Doctoral Fellows and Graduate Students on Contract) will route directly to HR. 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.
If the new hire is a benefited employee they can now return to the New Employees Main Menu to log in.
Only benefited new hires will see the link for the Flexible Spending Account.
Everyone must complete a Flexible Spending Account election before they can enroll in their Flexible Benefits. If the employee wishes to waive FSA, 0 (zero) should be entered in both My Annual Contribution fields.
New hires will immediately see this confirmation page once they submit their elections.

To return to the main menu they will need to select Exit.
• A check mark now appears indicating that the FSA has been completed. The next step is to select Flexible Benefits.
On page one, the new hire can enter their dependents by selecting “Add a new dependent” or they can select next step.
To add a dependent a new hire must provide Name, Relationship and Date of Birth and then select the link to add the dependent.

Dependent information currently does not update Peoplesoft and must be manually keyed.
Below are your benefit options and Flex Credits. To enroll or to change your benefits complete each section below.

First time enrollees in the Blue Care or Aetna HMO must designate a Primary Care Physician (PCP). Please use the "Edit" option to the right of your medical plan election and the labeled box to the right of covered dependents to designate the PCP selection. The PCP cannot be a physician’s name. It must be a six digit code. If you do not know the six digit code for your PCP, please see the link for Aetna or Blue Cross/Blue Shield for instructions and a PCP locator. If you are a current HMO participant, please contact Blue Cross/Blue Shield or Aetna customer service to change or update an existing PCP as these records are maintained by the provider.

**Medical**

<table>
<thead>
<tr>
<th>Options</th>
<th>Employee Only</th>
<th>Employee and Spouse</th>
<th>Employee and Child(ren)</th>
<th>Family</th>
<th>PCP (Required for Blue Care &amp; Aetna HMO)</th>
<th>Current Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>First State Basic</td>
<td>$236.06</td>
<td>$488.43</td>
<td>$358.85</td>
<td>$610.55</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blue Care</td>
<td>$243.76</td>
<td>$512.28</td>
<td>$372.32</td>
<td>$639.47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comprehensive PPO</td>
<td>$260.36</td>
<td>$539.89</td>
<td>$399.91</td>
<td>$674.92</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aetna HMO</td>
<td>$243.61</td>
<td>$511.09</td>
<td>$372.05</td>
<td>$638.03</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Coverage</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your Flex credit equals the cost of First State Basic medical coverage. Flex Credit for NO COVERAGE is $14.59. If you select NO COVERAGE, you must provide proof of other coverage or you will automatically be enrolled in the default plan.

**Dependent Information - Medical Coverage**

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Date of Birth</th>
<th>Medical</th>
<th>Primary Care Physician (PCP)</th>
<th>Current Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricardo, Ricky</td>
<td>Spouse</td>
<td>04/07/1955</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Dental**

<table>
<thead>
<tr>
<th>Options</th>
<th>Employee Only</th>
<th>Employee and Spouse</th>
<th>Employee and Child(ren)</th>
<th>Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Program</td>
<td>$19.69</td>
<td>$39.62</td>
<td>$44.33</td>
<td>$64.43</td>
</tr>
<tr>
<td>No Coverage</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your Flex Credit equals the cost of Dental coverage. Flex Credit for NO COVERAGE is $4.17.

**Dependent Information - Dental Coverage**

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Date of Birth</th>
<th>Dental</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricardo, Ricky</td>
<td>Spouse</td>
<td>04/07/1955</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Vision Care**

<table>
<thead>
<tr>
<th>Options</th>
<th>Employee Only</th>
<th>Employee and Spouse</th>
<th>Employee and Child(ren)</th>
<th>Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Plan</td>
<td>$3.12</td>
<td>$6.70</td>
<td>$5.05</td>
<td>$9.19</td>
</tr>
<tr>
<td>No Coverage</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your Flex Credit equals the cost coverage for employee only.

**Dependent Information - Vision Coverage**

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Date of Birth</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricardo, Ricky</td>
<td>Spouse</td>
<td>04/07/1955</td>
<td>Yes</td>
</tr>
</tbody>
</table>
• An enrollment section has been added for Blood Bank.
Please note that the Review page includes the FSA elections.
• Once Exit is selected, the new hire will return to the New Employees Main Menu.
• Now the employee must turn in any supporting benefit documentation to the Benefits office.
The new hire now must Log Out and the On-Boarding process is now completed!!!!!!
Onboarding Process Completed…
What Does That Mean?

• In the HR system and is ready to be paid
• Access to systems they need to perform their job may be requested
• If they made their benefit elections there will be no delay in coverage
• Ability to go to Public Safety to sign up for a parking permit
• Next day they will have an e-mail account
• Next day the ID system is ready for them to get an ID card
Position Changes

- Due to RBB (July 1) – HR will now be maintaining the funding for Positions
- We created a process that will update the Position funding from the current incumbent's funding on the JED. We will be running this on a regular basis.
- The process uses the Full Time Annual Rate and FTE from the JED to update Position
- For Positions that do not have funding information and do not have a current incumbent, we are researching the funding
- Departments will have the option to not have the Position funding updated with the funding on the JED
- Reports are being created by Institutional Research comparing the HR position funding to financial data. These reports will be available soon.
Created a new field “Update Funding with Job Information”
This field is a dropdown with yes or no
Currently all positions will be updated by the funding on the JED
A position change form needs to be completed if the department does not want the funding to be updated
In the position detail the new field “Update Funding with Job Information” will display “Y” or “N”
Questions and Contact Information

This presentation is available at http://www.udel.edu/onboarding

Let us know how things are going. If you encounter ANY problems, please let us know right away at hr-onboard@udel.edu

and There’s More to Come!

- New Training sessions for Fall as a result of the Training Surveys
- “New” New Employee Orientation (NEO) Process
- Long Term Care – changing vendors, more information available in the Fall
- 403b web form
- BTA merit increases-Vice Presidents, Deans and Directors will be notified by 6/26/09-you should hear soon after