

## HUMAN CAPITAL SERVICES

### Template Based Hire Training for Department Liaisons

#### **Hourly Student and Graduate Student Template Based Hire Process:**

Template Based Hire (TBH) is a method of hiring hourly and graduate students more efficiently into the Human Resource Information System (HRIS). TBH is for new hires only. It is not used for rehires or concurrent hires.

By using the Template Based Hire function –

- *You will expedite the hire process.* The new hire information is entered directly into a template which is then submitted to Human Capital Services (HCS) for approval. Note – This does not mean the hire is in HRIS immediately, but it does expedite the overall process.
- *You may print the appointment form after the information has been entered into the template.* This means you will not have to re-enter the information into the appointment form -- and Human Capital Services staff will not have to re-enter the same information in HRIS. The employee data is entered one time!

How does TBH work? In the template, data fields are grouped into one entry page. The process works as follows:

1. Hiring department gathers and completes all required documents for the hire process, except for the appointment form which will be generated at the end of the template based hire.
2. Hiring department signs into HRIS and completes template.
3. Hiring department submits the template to HCS for approval.
4. Hiring department prints the appointment form from HRIS and obtains notary and appropriate signatures.
5. New hire documents are submitted to HCS via ImageNow, campus mail or drop-off delivery.
6. Documents will go into a work queue in HCS ImageNow to be worked by HCS staff (based on the order in which received).
7. HCS staff will review the documents and approve the template based hire information entered by the department.
8. The employee hire data will be saved in HRIS and an employee ID will be generated.
9. HCS staff will complete the rest of the data processing for the employee (tax data, direct deposit, etc.).

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**Step 1: Gather all information required for the hire. (i.e., Form I-9 and supporting documents; employee's personal information such as official name, birthdate, etc.).**

**Step 2: Access HRIS/Template Based Hire:**

*Workforce Administration – Smart HR Template – Smart HR Transactions*

Transaction Template ?

Transaction Type: All

Select Template: [Search Icon]

Click on the search icon.

Create Transaction

Transaction Type: All Refresh

Transactions in Progress ?

You do not have any transactions in progress.

Go To Transaction Status

**Step 3: Select the appropriate template for your hire:**

Look Up Select Template

Search by: Template begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-4 of 4 Last

Template	Description
AFFILIATED PERSON	Affiliated Person
HIRE A GTA GRA	Hire a Graduate Teaching or Research Assistant
HIRE A STUDENT	Hire students via template
HIRE A TEMPORARY	Hire a Temporary Employee

Select the appropriate template.

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#### Step 4: Click on the “Create Transaction” Button

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Select a template and press Create Transaction.

**Transaction Template** ?

Transaction Type: All

Select Template: HIRE A STUDENT

Hire students via template

Transaction Type: All

Refresh

**Transactions in Progress** ?

You do not have any transactions in progress.

Go To Transaction Status

Create Transaction

#### Step 5: Complete “Enter Transaction Details”:

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### Enter Transaction Details

The following transaction details are required.

Template: Hire students via template

Organizational Relationship: Employee

Country: United States

Category Code: Hourly Student - Job Code 035000

\*Empl ID: NEW

\*Job Effective Date: 04/16/2018

\*Action: Hire

\*Reason Code: Vacant Position

Format Using: English

Address Country: United States

Continue Cancel

Select on “Continue” to complete the template.

See the next page for instructions.

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- **EmplID** – In most cases, you will leave the EmplID as NEW. If the student has an employee ID from another state agency, you should go ahead and enter it here so another ID is not generated (i.e., S0000012345).
- **Job Effective Date** – Enter the effective date of the hire transaction. (MMDDYY)
- **Action** – Default is “Hire”.
- **Reason Code** – Default is “Vacant Position”.

#### 5. Enter Transaction Information

Begin entering the employee information. Required fields are noted with an \*. Note that some fields have drop down boxes or look up functionality.

**New Student Hire**

**Primary Name - English**

\*First Name  Middle Name   
 \*Last Name  Name Suffix

**Person National ID United States**

\*National ID Type  \*National ID

**Person Email Address 01**

\*Email Type  \*Email Address

**Person Marital Status**

\*Marital Status

**Person Address 01 - United States**

\*Address Type   
 \*Address Line 1   
 Address Line 2   
 \*City  \*State   
 \*Postal Code  \*County

Enter the name and social security number as it appears on the social security card.

- **First Name, Middle Name, Last Name** - Enter the name as it appears on the social security card.
- **National ID:** Enter the social security number as it appears on the social security card.
- **Email Address:** Enter the full email (eid) including @ksu.edu or @k-state.edu.
- **Marital Status:** Select from the dropdown box.
- **Person Address:** Enter the address. Select the State and County from the look-up icon or enter the 2-letter code.

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#### Template Continued from Previous Page

<b>Person Phone Number 01</b>	
*Phone Type <span style="border: 1px solid #ccc; padding: 2px;">Main</span> <span style="float: right;">Telephone <span style="border: 1px solid #ccc; padding: 2px;">785-555-1111</span></span>	
<input checked="" type="checkbox"/> Preferred	
<b>Person Gender</b>	
*Gender <span style="border: 1px solid #ccc; padding: 2px;">Female</span> <span style="float: right;">▼</span>	
<b>Person Education Level</b>	
*Highest Education Level <span style="border: 1px solid #ccc; padding: 2px;">D</span> <span style="float: right;">🔍</span>	
<b>Birth Information</b>	
*Date of Birth <span style="border: 1px solid #ccc; padding: 2px;">01/02/1995</span> <span style="float: right;">📅</span>	
<b>KSU Visa Type</b>	
Visa/Permit Type <span style="border: 1px solid #ccc; padding: 2px;"></span>	
<b>Citizenship Status</b>	
*Citizenship Status <span style="border: 1px solid #ccc; padding: 2px;">I</span> <span style="float: right;">🔍</span>	
<b>Person Student Status</b>	
<input checked="" type="checkbox"/> Full-Time Student	
<b>Diversity - United States</b>	
*Ethnic Group <span style="border: 1px solid #ccc; padding: 2px;">WHITE</span> <span style="float: right;">🔍</span>	<input checked="" type="checkbox"/> Primary Indicator for Multiple
<b>Personal Data - United States</b>	
*Military Status <span style="border: 1px solid #ccc; padding: 2px;">No Military Service</span> <span style="float: right;">▼</span>	

- **Phone Type:** Select the phone type from the drop down box and enter the number.
- **Gender:** Select gender from the drop down box.
- **Highest Education Level:** Select education level by searching on the looking glass.
- **Date of Birth:** Enter employee's date of birth (MMDDYY).
- **Citizenship Status:** Select the citizenship status by searching on the looking glass
- **Ethnic Group:** Select ethnic group by searching on the looking glass.
- **Military Status:** Select military status from the drop down box.

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#### Template Continued from Previous Page

<b>Work Location - Job Indicator</b>	
*Job Indicator	Primary Job <span style="float: right;">▼</span>
<b>Work Location - Position Data</b>	
*Position Number	<input type="text"/> <span style="float: right;">🔍</span>
<b>Work Location - Job Fields</b>	
*Company	SOK <span style="float: right;">🔍</span>
<div style="display: flex; justify-content: space-between;"> <div>CWSP Type, Regular/100%</div> <div>Regular 75%/25% CWSP <span style="float: right;">▼</span></div> </div>	
<b>Job - Payroll Information</b>	
FICA Status-Employee	Exempt <span style="float: right;">▼</span>
<b>Job Compensation - Pay Components</b>	
*Compensation Rate	<input type="text" value="7.250000"/>
<b>Employment Education &amp; Government - United States</b>	
Appointment End Date	<input type="text"/> <span style="float: right;">📅</span>
<b>Benefit Program - Benefit Record Number</b>	
Benefit Record Number	<input type="text"/>
<b>Comments</b>	
Comments	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <span style="float: right;">📎</span>
<b>Return to Enter Transaction Details Page</b>	
<div style="display: flex; justify-content: space-around;"> <span>Save and Submit</span> <span>Save for Later</span> <span>Cancel</span> </div> <div style="text-align: center; margin-top: 5px;"> <span>Send to HR for Completion</span> </div>	

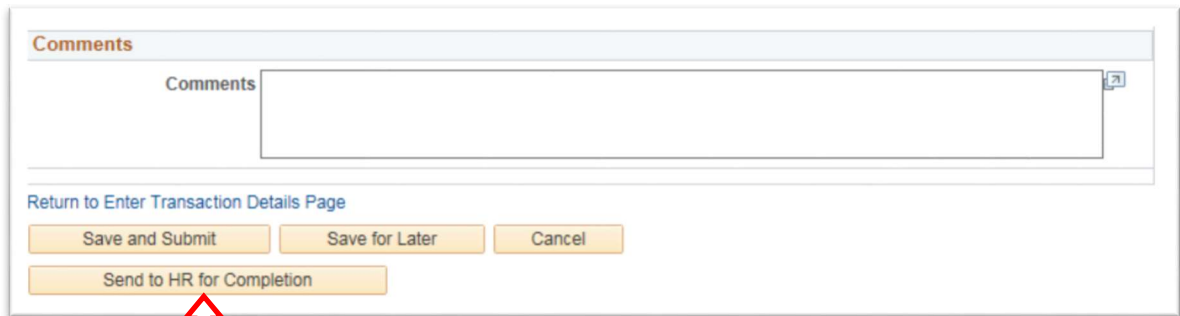
- **Job Indicator:** Defaults to Primary.
- **Position Number:** Enter the position number. The “W” must be in capital letters or you will receive an error message.
- **Company:** The default is SOK (State of Kansas). This will only change for local agencies.
- **CWSP Type (College Work Study Program):** Make the appropriate selection from the drop down box.
- **FICA Status-Employee:** Populates in HRIS. This should not be changed.
- **Compensation Rate:** Enter the rate of pay.
- **Appointment End Date:** Enter the end date, if you know it. An end date MUST be entered for graduate students; hourly students are optional.
- **Benefit Record Number:** Enter “0”.

After you have completed the template, you are ready to submit to Human Capital Services for final approval.

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### Template Based Hire Training for Department Liaisons

#### Step 7: Send to HR for Completion



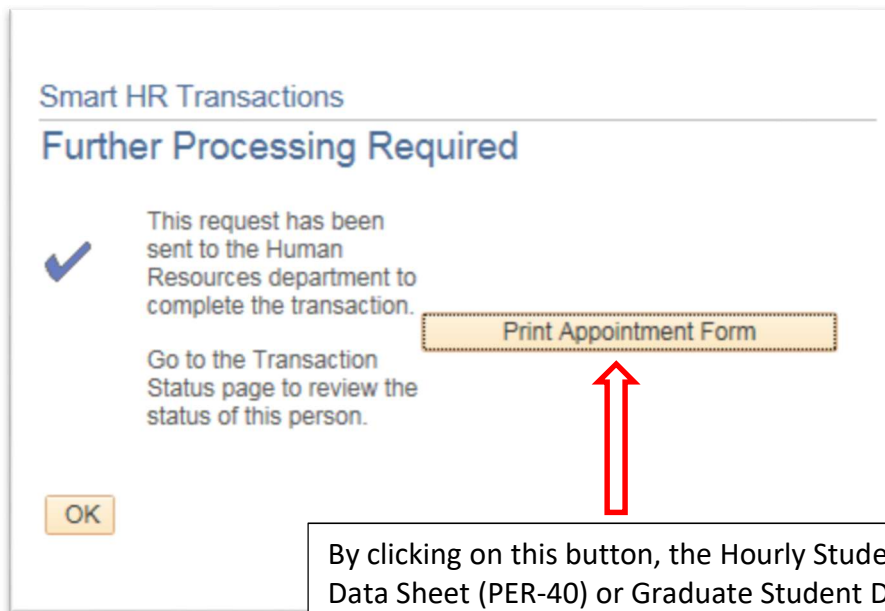
Comments

Comments

[Return to Enter Transaction Details Page](#)

To submit to HCS, you will click on the “Send to HR for Completion” button. **Be cautious when submitting this. You do not want to click on “Save and Submit”.** This will send the transaction directly to HRIS and jeopardize the hire process.

#### Step 7: Print the Appointment Form



Smart HR Transactions

**Further Processing Required**

✓ This request has been sent to the Human Resources department to complete the transaction.

Go to the Transaction Status page to review the status of this person.

By clicking on this button, the Hourly Student Data Sheet (PER-40) or Graduate Student Data Sheet (PER-41) will be created for you to print.

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#### **Step 8: Obtain Signatures and Supporting Documents**

The employee oath must be completed and appropriate signatures obtained after the form is printed. Once this is done, you will either scan the documents for imaging or submit the paper documents to Human Capital Services. HCS staff will review the documents for accuracy. When the review is complete, the hire is approved in HRIS. The department HR liaison and the employee will both receive the automated welcome email with the employee ID listed. The template based hire process is then complete!



**Contact Human Capital Services Resource Center & Operations staff with questions regarding the hire process in HRIS at (785)532-1888.**