Fac8a_Adding a Pending Worker_special

Overview

- This job aid is intended for the HCM Initiator.
- This job aid will cover the steps for a HCM Initiator to directly hire a paid faculty member (TTT or NTT) within iO.
  - This would be for unusual cases in which the new hire has not gone through the normal process of either applying to a posted job through Rice’s faculty hiring system or submitting an application to a private, waiver posting.
    - In either of those cases, the process below will be unnecessary, as the new hire will be automatically created as a pending worker in iO based on their application and the candidate approval process.
  - With the completion of this process of adding a pending worker, an onboarding checklist will be sent to the new hire to complete.
    - When the onboarding tasks have been completed, then the “Pending Worker” will be converted to an Employee.
    - Even rehires will need an onboarding checklist, as they have to update their I9, no matter how briefly they were in terminated status.
  - FYI, if they were never in terminated status in iO (i.e., they still have an Employee work relationship), and they are just being reappointed, go to job aid Fac5a for NTT reappointments.

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1. Navigate to the New Person Page

1. You can access the Add a Pending Worker task in two ways:

   a. (Option 1) Click the Navigator icon in the upper left-hand corner of the iO page.

      i. Under the My Client Groups section click the drop-down arrow and select New Person from the drop-down list.

   b. (Option 2) Under the My Client Groups tab on the home page, you can scroll down and click on the New Person tile on the Main Page to access the Add a Pending Worker task.
2. Entering Identification Information

1. Upon entering the New Person page, click Add a Pending Worker.

![Add a Pending Worker](image)

2. Under the Basic Details section enter the data for the following fields:

   a. **Proposed Start Date**: Use the calendar icon to select a hire date for the new employee.
   b. **Action**: Add Pending Worker
   c. **Action Reason**: Future hire to fill vacancy
   d. **Legal Employer**: William Marsh Rice University LE
   e. **Proposed Worker Type**: Employee
3. Under the Personal Details section enter the required fields:

   ![Personal Details section](image)

   a. **Enter Name**: Type the new hire’s last, first and preferred first name.
   b. **Gender**: If known, use the drop-down menu to select the new hire’s Gender. If unknown, leave this field blank and it will be obtained during the onboarding process.
   c. **Date of Birth**: If known, enter the new hire’s Date of Birth by using the calendar icon. This will be needed to help identify if they’re already in the system for something like reimbursement of travel expenses, to avoid creating duplicate identities in iO. If unknown, leave this field blank and it will be obtained during the onboarding process.

4. After entering all new hire identification information, click **Next** in the upper right-hand corner of the screen.
3. Entering Person Information

1. Now enter more personal information for the new hire, as much as is known.

   a. *Country*: The country will default to the United States.
   b. *Address Line 1*: Enter the new hire’s address.
   c. Address Line 2: Enter if needed.
   d. *ZIP Code*: Enter your new hire’s current ZIP Code. After entering the ZIP Code, then either the City, State, County will autofill, OR you will need to use the drop-down menus to manually enter the City, State, and County information.

2. Add Phone Details. This may be needed to contact the new hire to assist with their onboarding. To do this, select the + icon.

3. Select the Type of phone and Country Code by using the drop-down menus. Then manually type the Area Code and the phone Number.
4. Add Email Details. This is needed to send them a background check authorization, possibly an appointment letter, and other onboarding information. To do this, select the + icon.

5. Under the Email Details section, select the Type of email by using the drop-down menu and then manually type the new hire’s Email.

6. Skip entering information for the Legislative Information, Citizenship and Visa Information, and Emergency Contact sections. This will be done by the new hire in Self-Service.
a. Note: The HCM Initiator should skip the Citizenship and Visa Information and Emergency Contact. These things will be entered via Self Service or an Integration.

7. After entering all new hire person information, click **Next** in the upper right-hand corner of the screen.

### 4. Review Person Profile Page

1. Review the data on Person Profile page. Option to add additional profile content, such as degrees, per their CV.

2. Click **Next** in the upper right-hand corner of the screen.

### 5. Entering Employment Information

1. After entering person information, you will need to enter employment or assignment information for the new hire:

   a. **Business Unit**: GENERAL.
b. **Include for Automatic Conversion**: No.

c. **Proposed Person Type**: Employee.

d. **Projected End Date**: Note: All NTT Faculty, as well as Assistant Professors, must have a Projected End Date indicating the end of this appointment or contract. Be aware that Projected End Dates do NOT actually end the appointment, nor does it stop pay! You must either actively END the assignment or, to reappoint, process a Change Assignment action.

2. After entering information about the assignment, you will need to enter position information for the new hire:

   a. **Position**: Search and select from the list of values. This is their position # and its associated title. See next two pages for more information, especially about pooled positions.

   The Position field identifies the position number, which you can see in the second column in the dropdown menu. The numbers that start with 1, 2 or 3 correspond to the budgeted position numbers from Banner, plus a 2-digit suffix.
So, if you have a budgeted position number, then search for that number in the “Code” field of the Search pop-up box.

However, pooled position numbers are different. They no longer start with a letter. Here’s how pooled positions work in iO:

**POOLED POSITION NUMBERS (CODE):**

XXXXX – XXXXX (1st set of digits = position class code; 2nd set of digits = iO org #)

To search for a pooled position number:
With a pooled position, if you get a warning message about this position not having any open headcount, just continue anyway.
b. **Synchronize from Position:**

- This field appears after you have selected a Position, and it set to Yes by default.
- Position Synchronization will auto-populate the values for Job, Department, Grade, Regular or Temporary, Full Time or Part Time, Assignment Category, Working Hours, Frequency, Standard Working Hours, and FTE fields.
- If you need to modify any of the auto-populated fields, go back and select **No** to Synchronize from Position and then carry on with the modifications.

When set to Yes, auto-fills some fields:  When set to No, fields become editable:

![Diagram showing field synchronization]

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c. **Job:** Choose value from drop-down menu, or Search (at the bottom). These are the options for faculty categories:

![Faculty categories]

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d. **Assignment Name:** Enter in the field provided. This is the title that will be displayed in the directory; can be specialized, as with endowed chairs or named titles, e.g., Wiess Instructor.
e. **Grade:** Choose from the drop-down menu or Search. For faculty, **RANK** is reflected in the Grade field, even though faculty positions do not have salary ranges. All faculty ranks in this dropdown list start with “Faculty –“, so you could search on “Faculty” to narrow down the list:

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty - Associate Professor</td>
<td>85TT2</td>
</tr>
<tr>
<td>Faculty - Associate Research Professor</td>
<td>65RP2</td>
</tr>
<tr>
<td>Faculty - Associate Teaching Professor</td>
<td>60TP2</td>
</tr>
<tr>
<td>Faculty - Instructor</td>
<td>30OT0</td>
</tr>
<tr>
<td>Faculty - Lecturer</td>
<td>35LR1</td>
</tr>
<tr>
<td>Faculty - Nonstandard academic rank</td>
<td>25OT0</td>
</tr>
<tr>
<td>Faculty - Professor</td>
<td>90TT3</td>
</tr>
<tr>
<td>Faculty - Professor in the Practice</td>
<td>45OT0</td>
</tr>
<tr>
<td>Faculty - Research Professor</td>
<td>75RP3</td>
</tr>
<tr>
<td>Faculty - Senior Lecturer</td>
<td>40LR2</td>
</tr>
<tr>
<td>Faculty - Teaching Professor</td>
<td>35TP3</td>
</tr>
</tbody>
</table>
```

[Image of dropdown menu with faculty ranks]
f. **Location:** Choose from drop-down menu. This refers to the room and building on campus where this person will be working. It is a required field. If they will not be working on campus or it doesn’t apply (as for a joint appointment), you can select “No Rice Location Assigned.”

To find a specific location, search on the name of the building, then select the room. The naming convention is like: **Building/floor/room#**.

g. **MAIL STOP:** To add the mail stop (Don’t forget!), click the Location Details icon to the right of the Location field and add the mail stop in the appropriate field. Enter it in this format: “MS-100”
h. **Working at Home:** Choose from drop-down menu.

i. **Worker Category:** Leave blank for faculty.

j. **Assignment Category:** Choices for faculty include:

![Worker Category Options](image)

- T/TT Faculty: Benefits Eligible
- NTT Faculty/Promotable: Benefits Eligible
- NTT Faculty: Benefits Eligible
- NTT Faculty: Non-benefits Eligible
- Adjunct and Unpaid Faculty
- Retiree: Faculty
- Retiree: Emeritus Faculty

includes Teaching Professor and Research Professor ranks

NTT faculty are benefits eligible if they teach at least 3 classes over both the fall and spring semesters in a given academic year. This is per Rice’s Policy 403 on benefits eligibility.

k. **Working as a Manager:** Select No unless you know whom they will supervise and are ready to add them. This can always be changed later.

l. **Hourly Paid or Salaried:** Choose from drop-down menu. Faculty are always salaried.

m. **Working Hours/FTE:** For budgeted positions, this defaults in, e.g., as full-time (1 FTE).

For instructional NTTs, use this as a general guide:

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**Classes taught per year / Working hours per week / FTE:**

<table>
<thead>
<tr>
<th>Classes</th>
<th>Working hours per week</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 class</td>
<td>6.7 hrs/wk</td>
<td>.17 FTE</td>
</tr>
<tr>
<td>2 classes</td>
<td>13.6 hrs/wk</td>
<td>.34 FTE</td>
</tr>
<tr>
<td>3 classes</td>
<td>20 hrs/wk</td>
<td>.5 FTE</td>
</tr>
<tr>
<td>4 classes</td>
<td>26.7 hrs/wk</td>
<td>.67 FTE</td>
</tr>
<tr>
<td>5 classes</td>
<td>33.4 hrs/wk</td>
<td>.84 FTE</td>
</tr>
<tr>
<td>6+ classes</td>
<td>40 hrs/wk</td>
<td>1 FTE</td>
</tr>
</tbody>
</table>

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When you change the Working Hours and click or tab out of the field, note how the FTE changes:
CONTINUE TO THE RIGHT HAND COLUMN of the Job Details page:

Select or fill in these fields:

n. **Skip down to Total Classroom Hours/Total Office Hours:** (These two fields about hours can be left blank for TTTs and full-time NTTs, but should be filled out for less than full-time teaching NTTs.)

Enter the number of **credit hours per year** they are expected to teach. For example, three 3-hour classes (2 classes in the fall and 1 in the spring) = 9 Total Classroom Hours.

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**ACA (Affordable Care Act):**

This applies to NTTs (usually part-time) who do not qualify for Rice benefits (see Policy 403), yet may qualify for health insurance through ACA.

- **2.25 hours** to be counted for each “classroom hour” (not credit hour) of time per week. Note, the multiplier of 2.25 provides credit for time spent towards class preparation and grading.
- **1.00 hour to be counted,** per week, for each additional hour that the NTT faculty member spends performing required duties outside of the classroom such as office hours, required meetings, and/or other required duties within the department.

**Example:** One (1) class that meets three (3) hours per week and requires two (2) office hours would equate to 8.75 total ACA eligible hours.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Required in iO</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 classroom hours x 2.25 =</td>
<td>6.75 hours</td>
<td></td>
</tr>
<tr>
<td>2 office hours</td>
<td>2.00 hours</td>
<td>Required in iO</td>
</tr>
<tr>
<td><strong>TOTAL ACA eligible hours</strong></td>
<td><strong>8.75 hours</strong></td>
<td><strong>Not required in iO</strong></td>
</tr>
</tbody>
</table>

For iO this one 3-hour course would translate to:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Courses</td>
<td>1</td>
</tr>
<tr>
<td>Total Classroom Hours</td>
<td>6.75</td>
</tr>
<tr>
<td>Total Office Hours</td>
<td>2</td>
</tr>
</tbody>
</table>
o. **Tenure Status:** Non-Tenure Track

p. Then, under the Manager Details section search for and add the new hire’s immediate supervisor. Enter the **Name** and Manager **Type**.

For faculty, their Manager would be the department chair or center director. The Type is always Line Manager.

3. Next on this page, under the Payroll Details section enter the **Tax Reporting Unit** by using the drop-down menu and selecting **William Marsh Rice University LRU**.

4. Then, click the **+** icon to add the new hire to a Payroll.

5. Select the appropriate **pay frequency**. Faculty are always **Semi-Monthly**.

6. Click **Next** in the upper right-hand corner of the screen to move to the next steps.
6. Entering Compensation and Other Information

1. To enter salary information, select the **Salary Basis** by using the drop-down menu. Choose the appropriate basis:

   ![Salary Basis Image]

2. Next, manually enter the **Salary Amount**.

   ![Salary Amount Image]
3. Scroll down to Expenses Information: Expand the Expenses Information section by clicking the little triangle pointing right, and then click on the Search icon. A pop-up to appear.

![Expenses Information](image)

a. Note: All Default Expense Accounts should have the same values down the line with the exception of Organization. This value will be determined by whatever department the Employee is being added into with Dept Code = Organization Code.

![Default Expense Account](image)

b. Select OK when complete.
4. Click **Next** in the upper right-hand corner of the screen.

5. Finally, review and verify all information for the new hire.

6. When finished reviewing all information, click **Submit**.

7. You will receive a Warning message after pressing submit. Press **Yes** to continue.

8. Finally, you will receive a Confirmation that your request was submitted. Press **OK** to finish.
This will trigger an onboarding process with a checklist for the new hire. Once all the onboarding tasks are complete, the employee will be switched from a pending worker to an employee and will become eligible for pay.