HIRE A STAFF MEMBER OR EXEMPT TEMP/LHT

Quick Steps

To hire a Staff member, Exempt Temp or Exempt LHT, take the following steps in Aurora:

1) Select Create New Action > Hire/Transfer/Promotion/Downgrade in the top menu
2) Search for the employee using Basic Search
   a. If the employee’s record is found, select the record and continue to Step 3
   b. If the employee’s record is not found:
      i. Use the Advanced Search to confirm that there is no existing record for the employee in the Identity and Access Management system
      ii. Create a New HUID for the new employee
3) Select the Appointment Type All Staff
4) Attach a Position (required) and a Requisition (if applicable)
   a. If the new hire is not currently employed at Harvard, you will be brought directly to the New Hire Form.
   b. If the new hire has an existing job at Harvard select Hire - Additional Job from the Appointment Action screen to be brought to the New Hire form.
5) Fill out the New Hire Form, including:
   a. Personal Information, Home Address, Email and Telephone
   b. Appointment Information
   c. Position Information
   d. Position Description
   e. Costing
   f. University Mailing Address
   g. Education
   h. Position Tracking Notes
6) Attach supporting documents, if desired
7) Submit

The remainder of this guide contains detailed step-by-step instructions and FAS policy guidance. You can jump to specific sections using the Table of Contents, if desired.
Contents

Quick Steps........................................................................................................................................ 1
Search / Create New HUID / Appointment Type ........................................................................... 3
  Select Appointment Type ........................................................................................................... 6
  Attach Position and Requisition Screen ................................................................................ 6
  Attach Position ........................................................................................................................ 6
  Attach Requisition .................................................................................................................. 7
New Hire Form ................................................................................................................................... 9
  Action Information .................................................................................................................... 9
  Personal Information, Home Address, Email and Telephone ................................................... 9
  Appointment Information ....................................................................................................... 11
  Position Information ............................................................................................................... 12
  Position Description ................................................................................................................ 13
  Costing ...................................................................................................................................... 13
  University Mailing Address ..................................................................................................... 15
  Education .................................................................................................................................. 15
  Position Tracking Notes .......................................................................................................... 16
  Attach Document ...................................................................................................................... 16
  Action Comments ..................................................................................................................... 17
  Completing the Form .............................................................................................................. 17
  Action Review Screen ............................................................................................................. 17
  Action Workflow ..................................................................................................................... 18
  Workflow History .................................................................................................................... 18
Search / Create New HUID / Appointment Type

When hiring an employee, it is important to determine if the person has an existing Harvard Identity. If they do, the same HUID should be used when processing the hire action. A new HUID should be created only if it has been determined that the employee does not already have a Harvard Identity.

To search for an existing Harvard Identity:

1) In your favorite browser log in to Aurora (https://aurora.fas.harvard.edu)
2) Hover over the Create New Action tab to view the full sub-menu
3) Select the Hire/Transfer/Promotion/Downgrade option and the Search for Existing Harvard Identity page will open.
4) Use the Basic Search to search for the person using their HUID or First and Last names.
   a. To search by HUID (Harvard University 8 digit ID), select the By HUID option, enter the number in the HUID field and click Search.
   b. To search by first and last names, select the By Name option, enter the first and last names and click Search. Note that both first and last names are required, though partial names can be entered to conduct this search.

Helpful Hint: Search by Name

- “Starts With” option is selected by default and lets you search by initial letters of the First and Last name.
- “Exact” option allows the user to search for the exact first or last name entered in the field. This can limit the number of results returned and is helpful for short last names like “Li”.

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*Hire – Staff & Exempt Temp/LHT (Last Updated 12/8/2017)*
5) After clicking Search, review the results in the Confirm Existing Harvard Identity list.

**SCENARIO 1:** If the individual is found, select the person using the radio button in the left column and click Continue. Proceed to the Select Appointment Type section on page 6.

**SCENARIO 2:** If the individual is not found using Basic Search, continue searching by selecting the Advanced Search tab and enter First Name, Last Name, Date of Birth and Last Four Digits of SSN to conduct a search against Harvard’s Identity and Access Management (IAM) system for a possible match. Please note that all four fields must be fully populated for the advanced search to work.

a. If results are returned under the Confirm Existing Harvard Identity header, review the results carefully to determine if any are a potential match for your new employee. Affiliation information is provided to help clarify potential matches. Names may change over time so it is important to double-check with the employee if there are potential matches.

**Helpful Hint: Advanced Search Results**

IAM may return partial matches that are inconsistent with your search criteria because the system has matched based on birthdate or SSN. The intent is to return the broadest range of matches to avoid creating duplicate IDs. If none of the partial matches are correct, opt to create a new HUID.

**NOTE:** Resolving a duplicate ID across Harvard’s systems is cumbersome and time consuming. We encourage users to check carefully for an existing identity before creating a new HUID.

i. If the results include a match, select the correct person using the radio button in the far left column and click the Continue button. Proceed to the Select Appointment Type section on page 6.

ii. If the results do not include a match, continue with the next step to create a new HUID.
b. If the results return as **No Matches Found** or do not contain a match, initiate the process for creating a new Harvard identity by checking the box under the **Create New Harvard Identity** header and clicking the **Create New HUID** button. This will bring you to the **Create New HUID** page.

6) The information provided in the Advanced Search will be pre-populated (First Name, Last Name, Date of Birth and Last Four digits of SSN). **Please review this information carefully to ensure it is correct.** If any information is incorrect, select the **Cancel** button to return to the Advanced Search Page.

7) If the information is correct, enter an **Onboarding Email** for the new employee. This will allow the employee to claim a HarvardKey using the email address provided.

8) Click the **Create New HUID** button. This will generate the new HUID and bring you to the **Select Appointment Type** page.
SELECT APPOINTMENT TYPE

The Select Appointment Type page will display a confirmation message if you created a new HUID number. This message will not appear for employees with existing Harvard identities.

1) Select the All Staff, Exempt Temps & Exempt LHTs option under the Staff / Temps/ LHTs header.

ATTACH POSITION AND REQUISITION SCREEN

Through the Attach Position and Requisition screen you will associate your new hire with a position (required) and a requisition (if applicable).

Attach Position

1) Enter the Appointment Start Date for the job
2) Select the Attach to Position button to search for positions.
3) Enter the desired search criteria and hit Search.
4) Review the search results. Click on the Position Number link displayed in the search results to view the position details in a separate tab.
5) Select the desired position from the search results using the Select button.
NOTE: If you are hiring into a new position that does not yet exist in Aurora, you will need to first create the new position before you can hire into it. See the Create Position user guide for more detailed instructions.

Attach Requisition

If your open position was posted in Aspire, you must also attach the Aspire Requisition to the new hire action.

1) Select the Attach to Req ID button to search for requisitions.
2) Enter the desired search criteria and hit Search.
3) Review the search results. Any Aspire requisitions that have been open in the last 12 months should be included.
4) Select a requisition using the **Select** button.

![Requisition Lookup](image)

If your open position was not posted in Aspire, select the **Requisition Not Required** checkbox, select a reason from the dropdown as to why a requisition was not required, and hit Continue.

From the **Attach to Position and Requisition Screen** you will be brought to one of two screens:

1) If your new hire is not currently employed at Harvard, you will be brought directly to the **New Hire Form**.

2) If your new hire is currently employed at Harvard, you will be brought to the **Appointment Action** screen where you will have the option of selecting whether to **Transfer** the employee or hire them into an **Additional Job**.

**Helpful Hint: When to Transfer an employee**

Use **Transfer** when you are hiring a staff member employed by another unit at Harvard and your appointment will replace the appointment in the other unit.

If transfer is the appropriate option for your scenario, please refer to the **Transfer User Guide** instead.

Assuming your job is in addition to the employee’s existing job rather than a replacement for it, select **Hire - Additional Job** and then click **Continue**. This will bring you to the **New Hire Form**.
New Hire Form

The New Hire form is divided into several sections. We will review each of the sections below.

**Action Information**

<table>
<thead>
<tr>
<th>Action Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Number</td>
</tr>
<tr>
<td>Action Type</td>
</tr>
<tr>
<td>Effective Date</td>
</tr>
<tr>
<td>Position Number</td>
</tr>
<tr>
<td>Aspire Requisition ID</td>
</tr>
</tbody>
</table>

The **Action Information** section displays basic information about the type of action you are creating.

1) **Action Number** will be populated once the action is saved or submitted. This number is generated by PeopleSoft and corresponds to the PeopleSoft Req ID.
2) **Action Type** is Hire.
3) **Effective Date** will be populated from the **Appointment Start Date** field upon save or submit.
4) **Position Number** and **Aspire Requisition ID** have been populated with information from the previous screen and are not editable.

**Personal Information, Home Address, Email and Telephone**

These sections will populate with any information about the employee available through PeopleSoft. For new employees with no previous affiliation, **Last Name, First Name**, and **Date of Birth** will populate based on the information entered on the previous page when creating the new HUID.
1) Complete all required fields (noted with a *) in the Personal Information and Home Address sections and add one or more email addresses or telephone numbers, if desired.

We suggest reviewing the following fields in the Personal Information section as you complete the form:

1) **SSN** – This field will have one of three values:
   a. **On File** – The employee’s SSN already exists in PeopleSoft. No action is needed.
   b. **Temp SSN** - PeopleSoft has a Temporary SSN on file for the employee. You will be notified to contact your Payroll Coordinator to get the SSN updated to a permanent SSN.
   c. **Blank field** - PeopleSoft does not have an SSN on file for the employee. Enter the nine-digit SSN in the SSN field and re-enter it in the field below. If you created an HUID, ensure the last four digits match what was provided on the Create New HUID form. This SSN is not stored in Aurora and will be passed to PeopleSoft once the form is saved as a draft or submitted.

**Helpful Hint: Mismatch in Temporary SSNs & I-9s**

If an employee has a temporary SSN on file and an I-9 is submitted with the permanent SSN, the employee will not show an Active I-9 on file until the SSN associated with their Empl ID is updated in PeopleSoft. You can work with your payroll coordinator to facilitate this update.

2) **Citizenship Status** - The status should match the information on the I-9.

3) **I-9 on File** – This field will display the current I-9 status after the action is saved or submitted to PeopleSoft.
   a. **Yes** - An I-9 is on file in PeopleSoft. No action is needed.
   b. **No** - PeopleSoft does not have an I-9 on file.
      i. A warning message will display at the top of the action and will remain until an I-9 is entered in PeopleSoft.
      ii. You will need to work with the employee to complete an I-9 and submit it to Central Payroll for the appointment to be finalized.
      iii. You may save the action as draft but should not submit the appointment to HR for approval until the I-9 is on file.
      iv. More information about the I-9 process can be found on the FAS HR website: [hr.fas.harvard.edu/pages/i-9-submission-process-and-resources](http://hr.fas.harvard.edu/pages/i-9-submission-process-and-resources).
Helpful Hint: I-9 Expiration
If an I-9 is submitted to Central Payroll and an active appointment is not present in PeopleSoft within 30 days the I-9 “expires” and FAS Payroll is unable to submit new appointments for that individual. When possible, Aurora calculates the I-9 expiration date for new hires and will provide a warning at the top of the action if the I-9 is scheduled to expire. The action must complete the full approval workflow in Aurora and be submitted to PeopleSoft prior to the expiration date.

Appointment Information

The Appointment Information section captures foundational information about the new appointment.

1) Enter the **Start Date** of the appointment.
2) If the appointment you are entering is a term appointment, select the **Term Appointment** checkbox. Note that the **End Date** field is now enabled and must be entered.
3) Review the **Pay Group** defaulted and make changes if required.
4) Review the **Salary Admin Plan**, **Standard Hours** and **FTE** fields. Note that if a requisition is attached, these fields default from the requisition and are not editable. If no requisition is attached then these fields default from the position and are editable.
   a. Note that the **Update Position** checkbox is checked by default which means that any changes made to the FTE will also be made to the position associated with the action. If you don’t want FTE changes to be reflected on the position, uncheck the Update Position checkbox.
5) The Full Time/Part Time field defaults based on the Standard Hours and Salary Admin Plan.
6) Enter the **FTE Salary**. Note that the **Annual Salary**, **Hourly Rate** and **Pay Period Amount** populate based on the salary entered. If you update any of these salary fields the others will recalculate.
7) Populate the **Schedule ID** field using the lookup icon displayed next to the field.
8) The schedule lookup does not enforce standard hours so that users can select rotating schedules. If you select a Schedule ID that does not match the Standard Hours you will receive a warning.

**Position Information**

Information in the Position Information section populates from either the position or the requisition, if attached. *Any fields populated from the requisition will not be editable.*

1) **Job Code** defaults from the Position/Requisition and is not editable.
   a. **Salary Grade**, **Employee Class** and **Comp Rate Code** are populated based on Job Code and are not editable.

2) **Business Title** defaults from the Position/Requisition. It can be edited if there is no requisition associated with the action.

3) Select a value for the **Critical Position** field from the dropdown.

4) Review the following fields that are defaulted from the position and update them as needed:
   a. **Supervisor** - Aurora allows you to associate a supervisor role with a Position or with a Person. This allows you to select a non-FAS employee or an employee without a position as a supervisor.
   b. **Aurora Group** - Aurora Groups largely map from the existing ASPERIN workgroups. The dropdown will populate based on the groups for which you have permission to hire.
   c. **PS Department** - The dropdown will include all PeopleSoft departments associated with the Aurora Group selected above.
   d. **Time & Labor Group** (non-exempt staff only) and **Absence Group**. These dropdowns populate based on the PS Department selected above.
   e. **Workgroup** (non-exempt staff only).
   f. **Harvard Location** is the office location associated with the appointment. This populates based on the PS Department selected but may be edited.
Position Description

Review the information populated in the Position Description fields. There are three tabs with nine different position description fields corresponding to the new job framework fields. Core Duties and Basic Qualifications are required fields.

⚠️ NOTE: If there is a requisition attached to the action any position description fields populated with Aspire data will be read-only. Similarly, if the job code associated with the appointment is part of the Job Framework project, you will see a warning symbol next to the Basic Position Description header and you will not be able to modify Core Duties or Basic Qualifications, which are standardized for all job codes in the framework. Other position description fields will be editable unless there is a requisition attached to the action.

Costing

The costing section of the new hire form allows the user to enter costing information for the appointment. It is required for paid appointments. If the position attached to the action has default costing, all required earnings codes will populate based on the default costing.
Exempt staff only require REG costing. Non-exempt staff are required to have four rows of costing:

1) REG – Regular
2) OTS – Overtime at Straight Rate
3) OTP – Overtime at Premium Rate
4) MMN – Meal Money

**To add costing,** select an **Earnings Code** from the dropdown and click the **Add/Modify button**.

**To modify existing costing,** select the **edit** link next to the existing earnings code you’d like to modify.

Both actions will bring you to the **Edit Costing** popup.

1) Enter new costing, modify existing costing rows, add costing rows using the **Add Row** button, or copy existing rows using the **button and then modify them. You may also delete existing rows using the **button. Note that the numbers in the % column must add up to 100%.

2) Use the **Validate** button to validate your costing and view descriptions for each costing element.

3) Use the **Save** button to save your costing to the New Hire form. Aurora will validate the costing string and prompt you if there are errors that must be fixed prior to saving.
**University Mailing Address**

University Mailing Address pre-populates in one of two ways:

1) For **existing employees with active appointments**, this section will populate with the current University Mailing Address and will not be editable. If the address is incorrect, the employee can edit it through PeopleSoft Self Service.

2) For **new employees**, this section will populate based on the PeopleSoft Department selected in the Appointment Information section. You may edit the first two lines of the pre-populated address or select an entirely different location using the Location Code search or by selecting the Outside Location checkbox for non-Harvard locations.

**Education**

The **Education** section allows you to enter any undergraduate or graduate degrees earned by the employee. This section will pre-populate with any information available in PeopleSoft for existing employees.

To add a degree:

1) Select the **Add Education** button to create a new empty row.

2) Use the lookup icon next to the **Degree** and **School** fields to search for desired values.

3) Enter the degree date in the **Date Acquired** field (use the first of the month if a precise date is not provided by the employee)
POSITION TRACKING NOTES

In the Position Tracking Notes section enter an explanation if any of the position-related data is changing as a part of the new hire action.

ATTACH DOCUMENT

Attach Document allows users to attach files and forms related to an appointment such as a Resume or Offer Letter. The following restrictions apply:

- All files must be in PDF format.
- A maximum of 8 files may be attached to an action.
- Files must be smaller than 20MB.
- Attached documents should never contain High Risk Confidential Information, such as an I-9 or any document that includes an SSN.

1) To attach a document, select the Attach PDF button. This will display the Attach Document popup window.

1) Select the Browse button to locate the desired PDF file.
2) Select the Document Type from the list displayed and select Upload to upload and attach the document to the action.
Once the document is uploaded it can be viewed or deleted by clicking the appropriate icon displayed next to the file.

To upload another document, select the Attach button and repeat the process.

**ACTION COMMENTS**

Use the Action Comments field to capture any additional information that would be helpful for approvers reviewing the action. These notes can be modified or appended to by approvers as the action moves through the workflow approval process.

**COMPLETING THE FORM**

Save as Draft, Submit and Cancel buttons are displayed at the bottom of the form.

1) **Save as Draft** saves the action and creates a draft action in PeopleSoft. You may then edit and submit the form at a later time.
2) **Submit** submits the form to PeopleSoft and advances the action to the next workflow stage for approval in Aurora. There may be a slight delay when submitting the form as all information is being passed to PeopleSoft.
3) **Cancel** removes the action. Once an action is cancelled it cannot be edited or submitted.

**NOTE:** Save as Draft and Submit both validate the form against Aurora and PeopleSoft business rules. Some validation errors prevent you from saving or submitting and will be noted at the top of the page. These will need to be corrected in order to save or submit the form.

**ACTION REVIEW SCREEN**

Once a form is successfully saved or submitted, the Action Number and Effective Date will populate in the Action Information section at the top of the page and the I-9 on File field in the Personal Information section will update. If there is no I-9 on file in PeopleSoft a warning message will display at the top of the action.
**ACTION WORKFLOW**

Once an action has been submitted, it goes through an approval workflow. Depending on your permissions, your action may either be in the **Department Approval** or **Back Office** stage after submission. The turnaround time for actions in the approval workflow depends on various factors such as how many actions are in the approver’s queue, whether an I-9 is on file, etc. More information about the Approval Workflow in Aurora can be found in the Aurora Knowledge Center at [about.aurora.fas.harvard.edu](http://about.aurora.fas.harvard.edu).

**WORKFLOW HISTORY**

The Workflow History section provides users with a log of the approval steps taken on an action. Users can see the **Approver Name**, **Department**, **Email** and **Phone** as well as the **Date** and time each approver took action and the type of action taken (**Status**).