



# Template-Based Hires – Page 1 Module

How to Hire and Rehire Employees in PAC using  
Template-Based Hire





# Template-Based Hires Page 1 Module and Role Overview

The *PAC Template-Based Hires (TBH)* course consists of two modules that provide guidance on how to complete a hire/rehire template. *Page 1* is where employee and position data is entered, and *Page 2* is where the labor accounting portion is entered.

Completion of both modules and the accompanying knowledge assessment available at the end of the *Labor Accounting Page 2* module is required to use the TBH in PAC. A score of 90% or better is required for passing the knowledge assessment.

This module provides you with the information about and guidance through the entry sections on Page 1 of the TBH templates.

**Estimated Time to Complete Module:** *45 minutes.*

The *Template-Based Hire Initiator* role is required to create and submit TBH Templates. The *Template-Based Hire Approver* role is required to approve hire/rehire transactions.

# About Template-Based Hire (TBH) Transactions

## What are Template-Based Hires?

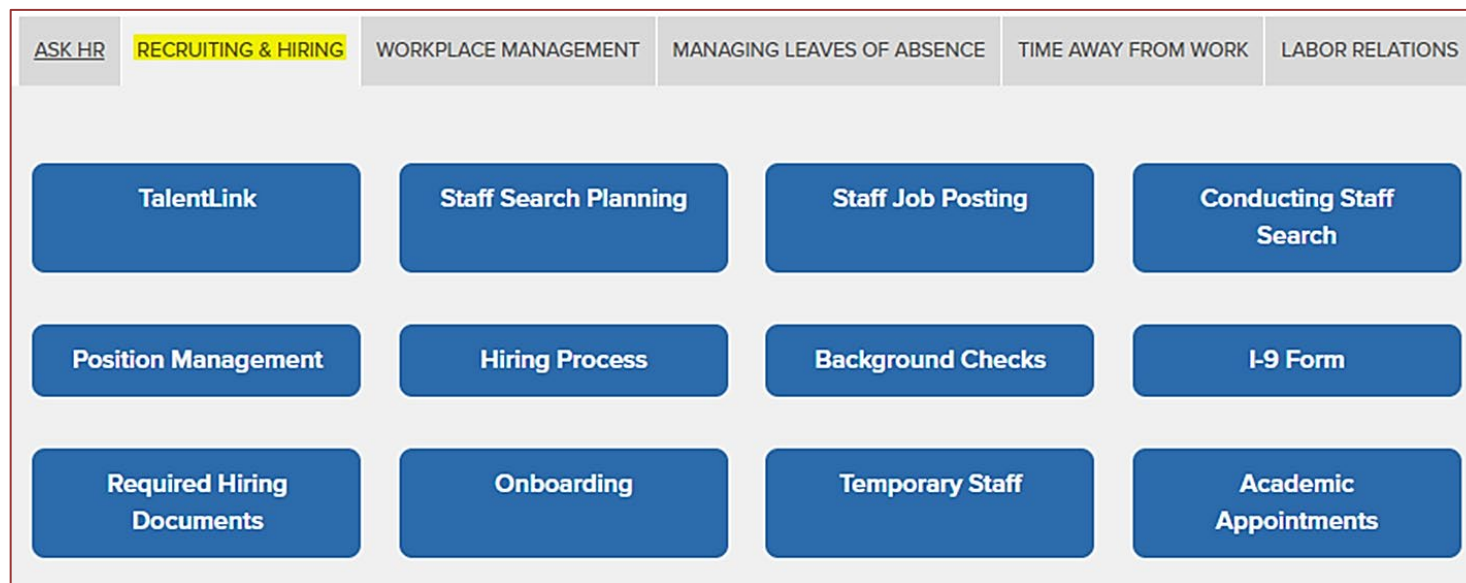
Template-Based Hire, or TBH, are PAC templates used to hire and rehire faculty and staff. They also include the initial Salary Distribution and Additional Compensation payments, if any, at the time of hire.

The Human Resources Processing Center (HRPC) completes the transaction and the person's information is placed in PAC.

## When are Templates Used?

TBH is the process used to submit the person's information into the HR System (PAC), *after* the hire/rehire process is completed. Templates are not used for promotions or transfers.

For information on the recruitment and onboarding process, visit the [Recruiting & Hiring section of the HR Manager Toolkit](#).





# More About Template-Based Hire (TBH) Transactions

## How do Other Systems/Applications Communicate with TBH?

**TalentLink.** A draft TBH is created for external administrative applicants hired in TalentLink and you do not need to begin a new template. The steps on how to access and complete the missing information is covered in an upcoming section. For more information on the TalentLink process, access the [How a Draft TBH is Created](#) document in the HR Website.

**Student Officer Templates.** A hiring template specific to student officers using data available from the Student Information System (SIS) will be available soon and this module will be updated with information on how to access those and if they are accessed within or outside of the TBH templates.

## How do I Get Access to TBH?

In addition to completing the training, you request PAC access by submitting the PAC Security Application accessible in [Service Now](#). Consult with your manager on the role(s) and department access you should be requesting.



# Hire Types and TBH Templates

## Hire Types

### Academic hires include:

- Officers of Instruction
- Officers of Research
- Officers of the Libraries
- Student Officers\*

### Administrative hires include:

- Officers of Administration (full-time and part-time)
- Support Staff employees (includes Casual and Student Casual\* Employees)

*\*Student Officers and Student Casuals will have a simplified template, information to be released soon.*

## TBH Templates - Specific to the Hire/Rehire Type and Campus

- The **Hire-Clinical** and **Rehire-Clinical** templates are used for ALL academic personnel at the **Columbia University Irving Medical Center (CUIMC)**. These templates are used for both clinical and non-clinical positions, except those who are reappointed by the roster process. For clinical positions, complete the clinical data fields on the form. For academic appointments with no clinical role, the clinical data fields are left blank. Used for Student Officers until the simplified template is available.
- The **Hire-Academic** and **Rehire-Academic** are used for academic personnel on the **Morningside, Lamont Doherty Earth Observatory (LDEO), Nevis** and **Manhattanville** campuses. Used for Student Officers until the simplified template is available.
- The **Hire-Admin** and **Rehire-Admin** templates are used to hire or rehire **administrative** positions regardless of campus.



# Hiring Types NOT using TBH

Below are employment instances where TBH is **not used**.

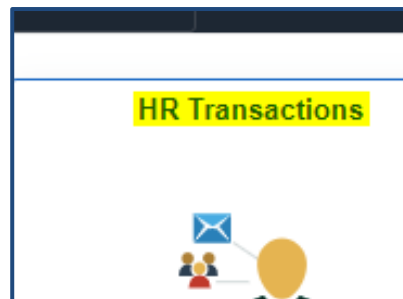
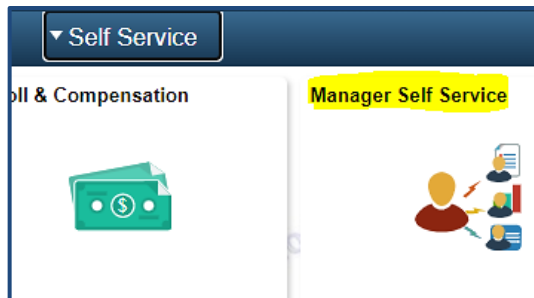
- Anyone who has an active record already in PAC, cannot have a TBH Hire/Rehire entry. E.g., an active Work Study, or prior stipend, or active retiree record. If their record is inactive, TBH Rehire can be used. Note: coming soon is a multiple job transaction, separate from the TBH hire and rehire templates, that will allow you to process a multiple job.
- People being hired with multiple jobs/appointments or those being hired into an additional job. Use the Multiple Job HR Transaction page.
- Academic personnel who are reappointed on rosters (as applicable when rosters are used).

For these types of hires, submit a [Personnel Action Form \(PAF\)](#) for Administrative hires or a [Nomination Form](#) for Academic hires.

# Access Template-Based Hire

## Navigate to the Hire/Rehire Templates

Select the Manager Self-Service tile from the PAC Homepage, then select HR Transactions. The TBH home page is in the **Hire/Rehire Employee** menu section.



**Tip!** Access the [TBH PAC Templates for Training View](#) for a visual of the form that you can follow along with as you progress through the training module.



# The TBH TalentLink Integration Process

## TalentLink

- For external administrative hire/rehire transactions through TalentLink, TalentLink will create a draft template in PAC once the status in TalentLink for the new employee is switched to **Hired/Initiate Onboarding**. Reference the [TalentLink – How a Draft TBH is Created](#) document for more information.
- Use the draft template created by TalentLink and do not create another TBH draft. The draft from TalentLink is marked with an asterisk.
- The draft template can be accessed and completed by any of the initiators in the hiring department. The first person to access and save it will be the only one who then sees it on their page and can submit it.

**Note:** once you complete and submit the TBH transaction, if you still have another draft TBH in your queue for the same person, you can delete it.

Documents do not import from TalentLink into PAC and there are also additional documents required for the hire that not in TalentLink. Reference the *How to Attach Documents* section. Visit the [TalentLink website](#) for information, including the [PAC TBH TalentLink Integration Web-Based Training Module](#) video.

# The TBH Home Page, Draft TBHs, and TalentLink

Blank templates are selected on the top of the **Hire/Rehire Employee** home page. Below this is the **Transactions in Progress** section, where you see **draft** transactions – templates that have not yet been submitted, ones that have been recycled from the 1<sup>st</sup> approver, and ones created from other systems, such as **TalentLink**. To access a draft template, click the employee's name from the list and continue entry. Steps upcoming.



Select	Transaction Type	Effective Date	Name	Person ID	Action
<input type="checkbox"/>	HIRE	09/01/2022	Qjsyr Lnzjwrqfrh	NEW	Hire
<input type="checkbox"/>	HIRE	09/01/2022	Qjsyr Lnzjwrqfrh	NEW	Hire
<input type="checkbox"/>	HIRE	10/17/2022	wrh ljwsgv	10	Rehire

An \* next to a name indicates it was created by TalentLink. If the name appears twice, open the one with the \*, save it for later and it will become yours, and the duplicate will be removed.

## To Delete Drafts

To remove a draft TBH, check the box next to it and then click **Delete Selected Transactions**. **Important!** Ensure that you want to permanently remove it because once deleted, the data cannot be retrieved. A new transaction will need to be created.



# Select a Template


Click the magnifying glass in the **Select Template** field and select the template for the type of hire (if draft was not created). Then click **Create Transaction**.

**Important:** select the correct template initially because once data is saved into a template it cannot be transferred into another template. You would have to delete the draft transaction and begin again in the correct template.

**Template Based Hire/Rehire**  
Select a template and press Create Transaction.

Transaction Template ?

Transaction Type: All

Select Template:  

Template	Description
HIRE-ACADEMIC	Hire Academic Officers (Morningside)
HIRE-ADMIN	Hire all types of Administrative Staff
HIRE-CLINICAL	Hire Academic Officers (CUMC)
REHIRE-ACADEMIC	Rehire Academic Officers (Morningside)
REHIRE-ADMIN	Rehire all types of Administrative Staff
REHIRE-CLINICAL	Rehire Academic Officers (CUMC)

**Create Transaction**

Refer to the *Hire Types and TBH Templates* topic for information on which template to select per the hire/rehire type.

# Enter the Hire Date

After you select a template, the first screen that appears displays defaulted information specific to the chosen template as well as the field to enter the **Job Effective Date** (the **Hire Date**) for the person.

If you selected an incorrect template, click 'Cancel' and begin again.

The Job Effective Date defaults to today's date and must be changed to the employee's date of hire/start of the appointment (if it isn't today's date). Then click **Continue**.

This is the only entry item on this screen in hire templates. Rehire templates also require the Employee ID be entered (see next topic for information). An asterisk (\*) indicates the field is required entry.

Once the Job Effective Date is entered, click the **Continue** button.

**Template Based Hire/Rehire**

The following information is required before hiring or rehirng a Person.

Template	Hire all types of Administrative Staff
Organizational Relationship	Employee
Country	United States
Category Code	Administrative Positions
Empl ID	NEW
*Job Eff Date (Hire Date)	01/23/2023
Action	Hire
Reason Code	New Hire

**Continue** **Cancel**

PAC logs you out of the application after a thirty-minute period of inactivity. Remember to frequently save your progress if needed using **Save for Later** on the bottom of the templates.

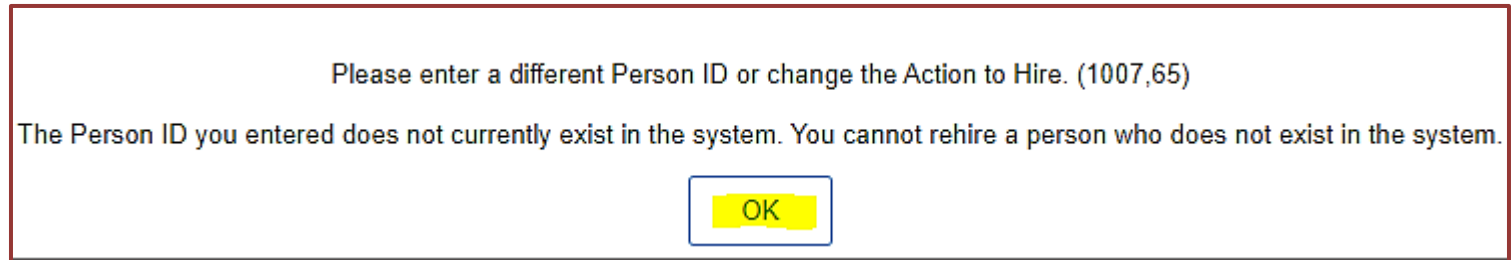
# The Rehire Template – Obtain and Enter the Employee ID

A rehire is someone who previously worked at and is returning to work at the University. The rehire template requires you to enter the person's Employee ID (EMPLID) from when they previously worked here. Information from PAC will populate into the template. Thus, you confirm the pre-populated data and update as needed and complete the blank fields. Enter the Employee ID and PAC will confirm the ID information and populate the template. If the Employee ID is not in PAC, an error message appears.



The screenshot shows a form titled "Rehire" with the following fields and values:

Template	Rehire all types of Adm
Organizational Relationship	Employee
Country	United States
Category Code	Administrative Positions
*Empl ID	<input type="text"/>
*Job Eff Date (Hire Date)	02/08/2023
Action	Rehire
Reason Code	Rehire




Please enter a different Person ID or change the Action to Hire. (1007,65)

The Person ID you entered does not currently exist in the system. You cannot rehire a person who does not exist in the system.

OK

- If the person worked in your department, locate the Employee ID using Manager Self Service (MSS).
- If the person was not in your department, contact the department where the person worked prior to locate the Employee ID in MSS

If the EMPLID only exists in the PSYCHE database (a retired legacy system for employees terminated prior to 2002 and whose information is not in PAC), an error message will appear. To complete the hire, process it via a PAF.



# Academic Appointments and the Rehire Template

The Academic and Clinical Rehire templates are used to rehire *terminated* employees. If the person is active and being reappointed, other methods are used dependent on the timing, campus, and hire specifics. *The rehire template is not used.*

- The Visa/Contract Renewal module is used to reappointment currently *active academic employees*.
- eComp is used on the Morningside Campus to reappoint faculty, officers of research, and officers of the libraries on-cycle from 7/1 to 6/30.
- The Reappointment Roster module (or manual process) is used *reappoint off-cycle academic positions*. Off-cycle reappointments are those that begin on dates other than 7/1, which is the on-cycle effective date.

For more information on academic appointments, visit these campus specific websites - [Academic Appointments – Morningside](#) and [Academic Affairs – CUIMC](#).

## **Additional Restriction for Morningside, Lamont Doherty Earth Observatory, Nevis and Manhattanville Campuses**

A nomination form using codes REH/MJB is used for the following rehire type and submitted through the Paper Transactions module and not using the rehire template.

- Faculty and officers of research who have retired from the University and being rehired as special lecturers or special research scholars/scientists.

# Enter/Confirm Personal and Job Data on TBH Page 1

You are now on page 1 of the template where Personal/Job Data is entered for the employee. Fields noted with an '\*' are required information and must be entered. To enter employee data, scroll through the form entering information into each field.

Smart HR Transactions  
Template Based Hire/Rehire  
Enter/Review the employee information.

Personal / Job Data Labor Accounting

Employee Information

Social Security No.  
Social Security No.

\*Job Eff Date (Hire Date): 01/23/2023

Go to Bottom of page

The **Job Effective Date/Hire Date** appears on the top right of the page. The date can be edited from here, if needed.

Click **Go to Bottom of Page** to go to the bottom of the page for additional options, such as **Save for Later**. Information entered in the template should remain when moving between pages. However, it is good practice to save periodically including before you change pages.

Click the **Labor Accounting** tab to save the information entered and move to page 2 of the template where you enter the employee's Salary Distribution and Additional Compensation Payments (if any). Refer to the *Template Based Hires and Labor Accounting (Page 2) module* for training on how to complete this page of the template.



# Social Security Number

Confirm the number entered corresponds exactly to what the employee entered on both of their tax forms. Press the **Enter** key or **tab out** of the field. A system check runs to look for matches to existing SSNs in PAC.

- If there is not a match for the person with this SSN and a valid 9-digit SSN was entered, continue with the entry as no one currently in PAC has this SSN.
- If this is a Rehire template, PAC will perform a check to determine that the SSN and Employee ID match.

Social Security No.

Social Security No.

If there is a match, a pop-up box will appear letting you know that this SSN already exists in the system. This could mean either of the following: that the SSN belongs to an active employee and thus you are unable to enter the hire into the template, or that the SSN belongs to a terminated person and the rehire template should be used. In either case confirm the correct SSN.

## Important!

- If the employee is a U.S. citizen the SSN field is required.
- Non-US citizens awaiting a Social Security Number *can be submitted via TBH*. The US Citizen field = N and the SSN field can be left blank. You must have the receipt that they applied for the SSN. Ensure that you follow up with the employee and submit their actual SSN to HRPC once it's received.



# SSN Search and System Check Results

## Results Returned based on the SSN Check

1. If you entered an invalid 9-digit number, an error message will appear saying that this is not a valid SSN and to check it and try again. A Tax ID number is not a valid SSN.
2. If there is a match and the SSN is currently in use by a Columbia University employee, an error message will appear saying that this SSN is already in use for an employee and will provide the Employee ID. If you receive this message, review what type of transaction should be taking place.
  - check that you entered the correct SSN or if the person has changed their name, or
  - if this is for a multiple job or additional academic appointments, you cannot use TBH but must submit a Nomination Form using the Paper Transaction module in PAC, or
  - if the person is a rehire, take note of the Employee ID and use the Rehire template to enter the transaction.



# Primary Name

Enter the employee's legal name as it appears on their tax forms and other legal documents.

- Name Prefix** - click the drop-down arrow and select a name prefix (required). When selecting a prefix for academic/clinical hires, follow these rules:
  - Use Professor - for faculty in a professorial position at the Morningside campus or CUIMC faculty without a medical or doctoral degree if their title contains the word "Professor."
  - Use Doctor - for all CUIMC faculty with appropriate degrees (medical degree, dental degree, or doctoral degree) and for all officers of research and all officers of the libraries holding doctoral degrees.
  - Use Mr. /Ms. - for those without doctoral degrees or without a professorial title.
- First Name** - enter the first name Middle Name - this is optional (required for academic personnel).
- Last Name** - enter the last name (required).
- Name Suffix** - this is optional (required for academic personnel).

The screenshot shows a form titled "Primary Name - English" with the following fields:

- \*Name Prefix**: A dropdown menu with a downward arrow.
- \*First Name**: A text input field.
- Middle Name**: A text input field.
- \*Last Name**: A text input field.
- Name Suffix**: A dropdown menu with a downward arrow.





# Preferred Name

If an employee requests use of a preferred name (optional), it can be entered in the Preferred Name section.

Enter the fields for **Name Prefix**, **First Name**, **Last Name**, **Name Suffix** as indicated by the employee. This name feeds to the directory and what will be displayed.

**Preferred Name**

Name Prefix

First Name

Middle Name

Last Name

Name Suffix





# Home Address

The employee's *permanent* home address. For people on a visa, faculty teaching on-line courses who do not live in the New York metropolitan area as well as visiting faculty and officers of research, Home Address should reflect the actual address of the person (either in the United States or in a foreign country). The Home Address must match the address on the tax forms, where year-end tax forms are sent.

- **Address Type** - defaults to 'Home'.
- **Country** - defaults to USA but can be changed as needed. Once you select a country from this field, the 'State' field contains states/provinces/areas specific to that selected country.
- **Address Line 1** - enter the street address (required).
- **Address Line 2** - enter the apartment/suite number (if applicable).
- **Address Line 3** - enter if needed.
- **City** - enter the city (required).
- **State** - select the state (required).
- **Postal Code** - the postal code (zip code for US addresses). A postal code is required if the country selected uses postal codes.

Home Address (Perm)

\*Address Type: Home (dropdown)

\*Country: USA (dropdown with search icon)

\*Address Line 1: [text input]

Address Line 2: [text input]

Address Line 3: [text input]

\*City: [text input]

State: [dropdown with search icon]

Postal Code: [text input]



# Mailing Address

The *local* home address of employees, students, visiting faculty or visiting officers of research. Enter the employee's mailing address **only** if the mailing address is different from the home/permanent address (otherwise leave blank). For people on a visa, Mailing Address should reflect where they currently live locally in the US.

- **Address Type** - defaults to 'Mailing'.
- **Country** - defaults to USA but can be changed as needed.
- **Address Line 1** - enter the street address (required, if needed).
- **Address Line 2** - enter the apartment/suite number (if applicable).
- **Address Line 3** - enter if needed.
- **City** - enter the city (required, if needed).
- **State** - Select the state (required, if needed).
- **Postal Code** - the postal code (zip code for US addresses), if needed. A postal code is required if the country selected uses postal codes.

Mailing Address (Curr)

Address Type: Mailing (dropdown)

Country: USA (dropdown with search icon)

Address Line 1: [text input]

Address Line 2: [text input]

Address Line 3: [text input]

City: [text input]

State: [dropdown with search icon]

Postal Code: [text input]

# Office Address

The *work* location is where the employee receives Columbia mail/the employee's official **CU** work address (required).

- For Morningside campus, enter the Room and Building and Mail Code only. If the employee is not in a campus building, enter the Firm Name (if applicable), Street, City, State, Zip /Postal Code (and Country if outside the United States).
- For faculty teaching on-line courses, the Office Address should be their CU address with “ONL” after the Room and Building (e.g., 303 Lewisohn - ONL).

- **Address Type** - defaults to 'CU Office' and cannot be changed.

- **Country** - defaults to USA but can be changed as needed.

- **Addr Line 1 (Rm & Bldg)** - the complete name of the Building Address, do not use abbreviations. Refer to the *Columbia University Building Names* Job Aid located on the HR Website.

- **Address Line 2** - do not need to enter if the above is a campus address (for Morningside addresses). For CUIMC addresses, use the street address.

- **Addr Line 3 (Mail Code)** - enter the Mail Code *numbers only* here (for Morningside addresses), e.g., 8705. For CUIMC addresses, leave blank.

- **City** - for Morningside addresses, do not enter if Columbia address. For CUIMC addresses, enter the City.

- **State** - for Morningside addresses, do not enter if Columbia address. For CUIMC addresses, enter the State.

- **Postal Code** - for Morningside addresses, do not enter if Columbia address. For CUIMC addresses, enter the Postal Code.

The screenshot shows a form titled "Office Address" with the following fields and values:

- \*Address Type: CU Office (dropdown menu)
- \*Country: USA
- \*Addr Line 1 (Rm & Bldg): [Empty text box]
- Address Line 2: [Empty text box]
- Addr Line 3 (Mail Code): [Empty text box]
- City: [Empty text box]
- State: [Empty text box]
- Postal Code: [Empty text box]

Watermarks for "AWS" and "\*Non-Production\*" are visible on the form.



# Phone Numbers

Enter the 10-digit number using the area code plus the number, without hyphens, parentheses, or a prefix. E.g., 2125551234.

The system will place this entry into the proper format, e.g., 212/555-1234 once the form is saved. The phone type defaults for each category.

**Note:** Phone number data fields are not *system* required fields, however, please be sure to enter either a home or mobile phone number along with the office phone number.

## Phone Number Fields

- **Home Phone Number**
- **Mobile Phone Number.** If the mobile number is entered, the employee will be automatically linked to the Public Safety Text Alerts
- **Office Phone Number.** This number will display in the directory once the record is added to PAC by HRPC. Use the employee's actual telephone office number and not the main office number. *Note:* for international telephone numbers, the number will appear as entered and not reformat.

**Important!** Employees can update their emergency contact and phone information using Employee Self-Service. Managers can also update employee phone information using Manager Self-Service.



# Gender, Birth Date and Marital Status

## Person Gender

Select 'Male' or 'Female'. If 'Unknown' is selected, a pop-up message appears when navigating to page 2 prompting you that 'Unknown' was selected as the gender. For Benefits purposes, the data feed requires that either 'male' or 'female' be selected.

## Birth Information

**Date of Birth** – key in or use the calendar icon to select the employee's date of birth. An error message will appear if the date of birth entered yields ages below 14 or above 100. Please confirm that the date of birth is entered correctly. Be especially careful when referring to documents from countries outside of the United States since the month and day are reversed. The format in US documents is MM/DD/YYYY. In documents from other countries the format may be DD/MM/YYYY.

## Person Marital Status

- **Marital Status** - select the employee's marital status from the drop-down list (required)
- **Marital Status Date** - required when the marital status = married. Key in with format MM/DD/YYYY or use the calendar icon to select the date. A future date cannot be entered, submit a PAF once the marriage has occurred to update the information.



# Citizenship Status and Visa

## Citizenship Status

**US Citizen** - select the employee's US Citizenship Status using the drop-down list. Select 'Y' if the individual is a US citizen; 'N' if the person is not a US citizen (is on a visa or is a Permanent Resident). This is a required field.

## Visa

If US Citizen = "Y", the Visa fields are greyed out and are not enterable or editable.

If US Citizen = "N", the Visa Type and Expiration Date fields are required specific to the employee's visa status. Note: An error message will generate if the information is not entered.

- **Visa Type** - click the magnifying glass to select from the list the type of visa the employee holds.
- **Expiration Date** – key in using this format MM/DD/YYYY or use the calendar icon to select the expiration date of the visa. ***Do not enter an expiration date for Permanent Residents.***
- **Perm Res Reg No.** - enter the 'A' number for Permanent Residents in the following format: A#999-999-999.

**Note:** Visa Type and Expiration Date must be the same as listed in the supporting documents. In general, the visa must have been obtained by Columbia University. If another entity has obtained the visa, please be sure to attach documentation that shows that the person is also eligible to work at Columbia University and use the expiration date tied to the period when the person can work at Columbia rather than the expiration of the visa belonging to the other institution.



# Ethnicity / Race

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Select all options as indicated in the [Voluntary Self-Identification of Race and Ethnicity Form](#) completed by the employee used to obtain this information as part of the new hire documentation.

If the employee did not specify, select the "Not Disclosed" option which is only currently available in the Academic templates. For the Administrative and Clinical templates, leave this blank until the templates are updated.

Employees can also update their information through Employee Self-Service.



# Education Data

Select highest education level achieved and details for completed degrees. Ensure the information is accurate and complete.

## Highest Education Level

Use the drop-down arrow and select the highest education level the employee has *achieved*. This field defaults to "Not Indicated" and must be changed.

It is a required field and is the record of the highest degree earned and not one that is in progress.

For example, if an employee currently holds a master's degree and is in process of obtaining a doctorate, the highest level completed is the master's degree.

Once the employee completes the doctoral program, the record can be updated by submitting a PAF with the appropriate documentation.

Person Education Level

\*Highest Education Level

A-Not Indicated

B-Less Than HS Graduate

C-HS Graduate or Equivalen

D-Some College

E-Technical School

F-2-Year College Degree

G-Bachelor's Level Degree

H-Some Graduate School

I-Master's Level Degree

J-Doctorate

M-Doctor of Medicine

N-Juris Doctor

**For clinical appointments.** When an individual has **both** a Doctor of Medicine and a PhD, the highest education level should reflect what is closest to being practiced. E.g., if the individual is teaching, the PhD is listed as the highest education level and as the highest degree. If the individual is in clinical practice, the MD is listed as the highest education level and highest degree.

# Education Data, continued.

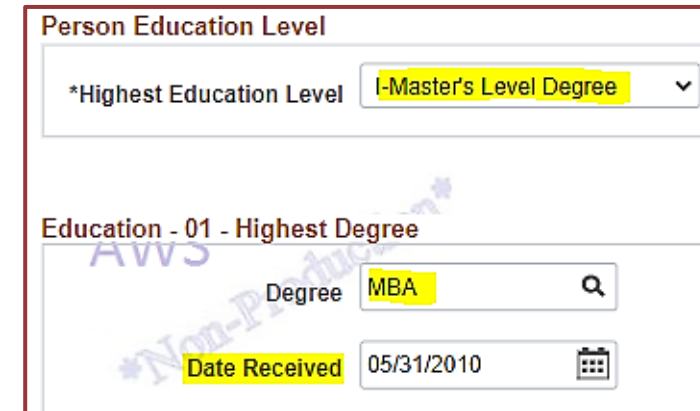
## Degree (required)

The **Degree** field indicates highest degree earned by the employee (required). *The highest degree must match the highest education level.* Click the magnifying glass to search for and select the highest degree the employee has *earned*. **Previous Highest Degree** appears when the rehire template is used and cannot be changed. Enter newly earned degrees as applicable.

## Date Received (required)

Click the calendar icon to select the date or enter the date using this format MM/DD/YYYY.

- If month and day are unknown, default to either 2/28, 5/31, or 10/31 if the degree was earned at Columbia; or to 6/30 or 12/31 if the degree was earned at another institution.
- The actual date (MM/DD/YYYY) must be provided for people who have received their doctorates within the past two years; no default dates may be used. If only the month and year are listed on the curriculum vitae, add the last day of the month to complete.
- If the employee's highest degree is *High School Graduate*, select "HS Graduate or Equivalent" in the Degree field. If the graduation date is known, enter the exact date. If unknown, enter a 6/30 date that is 18 years greater than their date of birth.



The screenshot shows a form titled "Person Education Level". It contains the following fields:

- \*Highest Education Level: A dropdown menu with the selected option "I-Master's Level Degree".
- Education - 01 - Highest Degree: A section containing:
  - Degree: A search field with "MBA" entered and a magnifying glass icon.
  - Date Received: A search field with "05/31/2010" entered and a calendar icon.



# Education Data, continued.

## School Code

Click the magnifying glass to search for and select the school code where the employee earned the degree specified. Reference the following slide on how to search for a school code.

- Select the *University* code for any degree earned from a school within that University. For example, use Columbia University and not Columbia College.
- If a school does not appear in the list, enter the code "2000" for a US University and "1000" for a Foreign University. Then enter the degree earned, the full name of the institution, its location (US state or country), and the complete date (MM/DD/YYYY) the degree was earned in the "Comments" field.
- For *High Schools* that do not appear in the list, enter the code "3000" for Other High School."

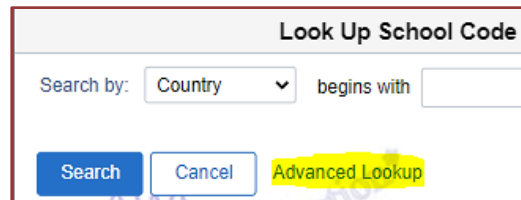
## School Description

This field defaults per the School Code selected and displays the school's name.

A screenshot of a form with two fields. The first field is labeled 'School Code' and contains the value '2093'. To the right of the input is a magnifying glass icon. The second field is labeled 'School Name' and contains the value 'Columbia University'. Both fields have a yellow highlight behind the text.

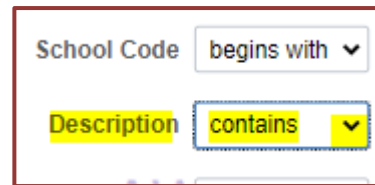
# Locate a School Code

1. Click the magnifying glass next to the School Code field.
2. Select **Advanced Lookup**. If the screen says *Basic Lookup*, you are in the Advanced Lookup feature.
3. Click the drop-down arrow next to **Description** and select **contains** from the list. This will allow for a more direct search.
4. Enter any part of the school's name in the **Description** field and Click **Search**.
5. Locate the school from the list that appears and click on either the School Code or Description link for the school. The information will populate into the School Code and Description fields.



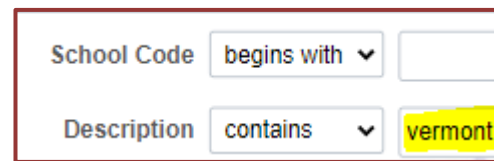
Look Up School Code

Search by: Country ▾ begins with



School Code begins with ▾

Description contains ▾



School Code begins with ▾

Description contains ▾ vermont



3920	UNIV VERMONT
3940	VERMONT COLLEGE
4142	VERMONT DEPARTMENT E

## Tips

- Use a more specific part of the name vs. the general, *University*.
- The "%" is a wildcard search symbol. E.g., typing, "flor%" returns results with school names that include both "Florida" and "Florence."
- If a school has multiple entries, use the most generic one (e.g., Columbia University, not Columbia University School of Business.)
- If unsure which version of the school's name to select, contact Academic Appointments (Morningside) and CUIMC Faculty Affairs (CUIMC).
- School Codes that begin with an "H" indicate hospitals. Do not select a hospital for the institution from which a degree was received.



# Education Data, continued.

## Education - Accomplishment Fields

Enter additional degrees the employee earned. Rehire templates display existing degrees from PAC.

- The Academic New Hire template has five additional degree sections. The Rehire template displays up to five existing degrees.
- The Clinical New Hire template has two additional degree sections plus two postdoctoral sections. The Rehire template displays up to four existing degrees.
- The Administrative New Hire template has four additional degree sections. The Rehire template displays up to four existing degrees.

## Tenure Data (required) – Tenure Status and Tenure Effective Date

Click the drop-down arrow to select the employee's **Tenure Status** from the list. Below lists the status used per hire type.

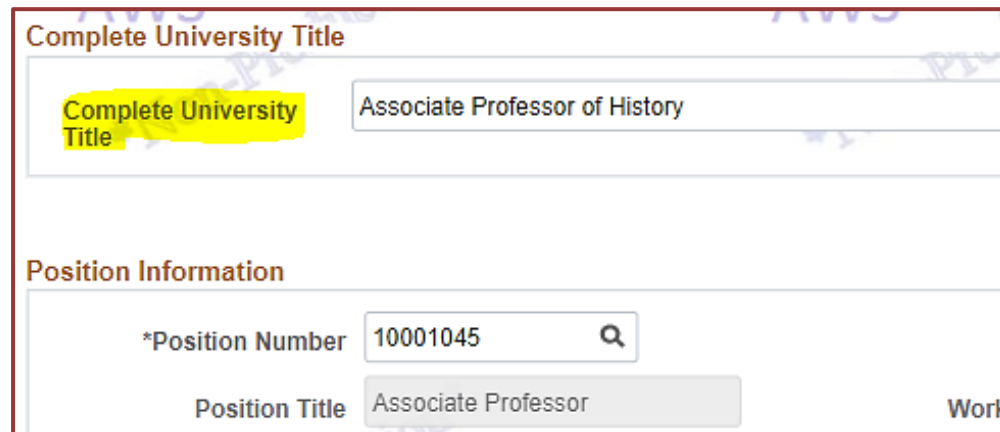
1. **Tenured** - used for faculty who have tenure. **Tenure Eff Date** is required for this status entered as MM/DD/YYYY.
2. **Tenure of Title** - used for faculty who have tenure of title. **Tenure Eff Date** is required for this status entered as MM/DD/YYYY.
3. **Non-Tenured But on Track** - used for full-time faculty who are on tenure track.
4. **Other Non-Tenured** - used for full-time faculty not on tenure track and all part-time faculty.
5. **None** - used for Officers of Research and Student Officers.
6. **Not Applicable** - used for Officers of Administration and Support Staff, Casual employees, and Work Study.

# Complete University Title

The **Complete University Title** field is a free form field which is a **mandatory entry for faculty, officers of research, and officers of the libraries. A Complete University Title should not be entered for student officers.** The position title and the position department should be combined to create the complete title (adhering to any exceptions).

Reference the [Complete University Title Guide](#) for complete instructions and examples including modified and unmodified titles for faculty, named professors, officers of research, officers of the libraries, and multiple appointments (via PAF).

The Complete University Title should not have any abbreviations or symbols (e.g., "&"). Academic personnel with one or more distinct titles (e.g., academic and administrative) should have these titles separated by a "semicolon" (e.g., Professor of History; Chair, Department of History).



The screenshot shows a web form with two main sections. The first section, titled "Complete University Title", contains a text input field with the value "Associate Professor of History". The second section, titled "Position Information", contains a search field for "\*Position Number" with the value "10001045" and a search icon. Below this is a dropdown menu for "Position Title" with the selected value "Associate Professor" and a "Work" button.



# Position Information

The **position number** indicates the job the employee is filling. The associated attributes of the job default based upon the position number entered and cannot be changed. Exception, some fields are editable if the *Override Position Data* box is checked\*.

If the TBH was created by TalentLink, the position number and information are populated. If not, key in or use the search feature to locate and select the employee's position number. The admin dept. determines the routing of the template for approval.

- **Position Title / Position Department Number / Position Department Name / Full/Part Time Status** - associated with the position
- **Job Code / Salary Grade** - for the position number entered.
- **Work Location** - indicates where the employee is working. Defaults based on the position number entered and can be changed if needed\* (Override Position Data box must be checked).
- **Admin Department Number** - the employee's administrative department per the position number entered. The template will route in the workflow to this department. This field can be changed to identify an administrative department different from the position department if needed\* (Override Position Data box must be checked).
- **Admin Department Name** - for the position number entered.
- **Standard Hours** - for the position number entered.
- **Previous Position Information** – appears for the person's last primary job when the rehire template is used, cannot be changed.

**Position Information**

\*Position Number    Override Position Data

Position Title  Work Location

Position Dept No.  \*Admin Dept No.

Position Dept Name  Admin Dept Name

\*Full/Part Time

\*Job Code  Standard Hours

Salary Grade

# Override Position Data (Override Administrative Department / Work Location)

Check this box to designate that the position is administered by a department different from the position department or that the employee is working in a location different from the one that defaulted with the position number entry.

**Important!** The administrative department is where the approval will be routed. Checking the Override Position Data box allows you to enter a different admin department number which is where the template will route. Be sure to enter the new department number. Otherwise, the transaction will route to the approvers in the defaulted position department and not to the administrative department where you would like it to go.

For example, a faculty member holds an appointment in Economics, but ISERP is the administrative department, or a faculty member is trained in the discipline of Medicine and the position is in a Medicine sub-department, but Surgery is the administrative department. The hiring documents should reflect if a position should be administered by another department.

The screenshot shows a 'Position Information' form with the following fields and values:

- \*Position Number: 10002521
- Position Title: Assistant Clinical Professor
- Position Dept No.: 752430X
- Position Dept Name: NEU Clinical Ops
- \*Full/Part Time: Full-Time
- \*Job Code: 012100
- Salary Grade: FAC
- Standard Hours: 35.000000
- Work Location: 02
- \*Admin Dept No.: [Empty]
- Admin Dept Name: NEU Clinical Ops
- Override Position Data:  (highlighted in yellow)



# If you Need to Obtain the Position Number

## Obtain a Position Number for an Existing Position

The Job Description in TalentLink or the Requisition section of the job listing in the Academic Search and Recruiting (ASR) system should include the position number.

Position numbers for existing positions are also listed in the HR Data Reports - *Active Positions Report*, or *Active Positions and Incumbents Report*. Which lists all active positions and their associated position numbers (and Incumbents if that report was run) in your department. Reference the [Human Resources Reporting Training Guide](#) for information on running HR reports.

## Obtain a Position Number for a New Position

**Administrative Positions** - the position number is requested through TalentLink when creating a job description. Central Human Resources will create the position number and add it to the job description in TalentLink. If you initiated the job description, you will receive a notification that the job description has been approved, which means a position number has been added to the job description. Once you receive the approval notification, go to the job description to review the position number.

**Note:** For most cases, new position numbers must be created in TalentLink. If a position number needs to be created outside of TalentLink, contact your HR Business Partner. Reference the [TalentLink - How to Create a New Job Description Without a Position Number](#) document for information. See the *TBH TalentLink Integration Process* section for information on how hire/rehire templates are created for administrative hires.

**Academic Positions** - Contact the Provost Office (Morningside) or Faculty Affairs (CUIMC) to obtain the position number.



# Interdisciplinary Departments

Officers of instruction in a professorial rank who fulfill significant functions in more than one department or in a department, an institute, or a center may hold interdisciplinary appointments.

There is one (1) section for an Interdisciplinary Department entry on the Morningside Academic Template and there are two (2) sections for Interdisciplinary Department entries on the CUIMC Academic Template.

In the Interdisciplinary Departments section, enter the department, if applicable.

- **Department No.** - enter the department number of the Interdisciplinary Department
- **Effective Date** - the effective date *defaults to the date of hire* once a department number is entered
- **Department Name** - this field defaults based upon the department number selected

**Note:** If an individual holds an Interdisciplinary Appointment, be sure to attach the Memorandum of Agreement as part of the documents file.

Interdisciplinary Department - 01

Effective Date

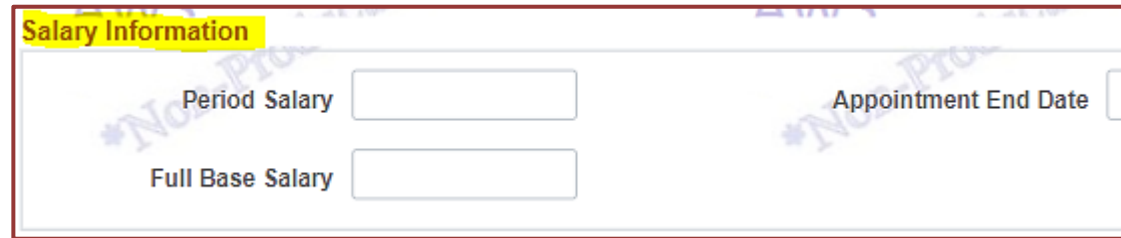
Department No.

Department Name

# Compensation Information

## Salary Information Section

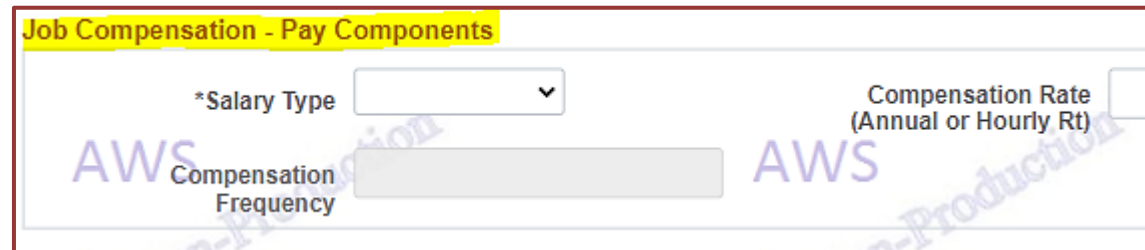
The Salary Information Section is completed for academic/clinical hires whose appointment has an end date. This section is not completed for administrative hires. For admin hires, leave this section blank and continue to the next section. **Previous Salary Information** appears for the person's last primary job when the rehire template is used, cannot be changed.



The screenshot shows a form titled "Salary Information" with a yellow header. It contains three input fields: "Period Salary" (top left), "Full Base Salary" (bottom left), and "Appointment End Date" (top right).

## Job Compensation Section

This section is completed for all hire types. It is where the employee's pay is entered and this feeds to Payroll and is used to calculate an employee's regular earnings. **Previous Compensation** appears for the person's last primary job when the rehire template is used, cannot be changed.



The screenshot shows a form titled "Job Compensation - Pay Components" with a yellow header. It contains three input fields: "\*Salary Type" (top left, dropdown menu), "Compensation Rate (Annual or Hourly Rt)" (top right), and "Compensation Frequency" (bottom center).



# Salary Information Section – Academic Hires

## Period Salary

The salary amount for the *period* of the appointment. If the appointment is equal to a full year, this value will equal the full base and the annual salary. If the appointment is less than a full year, calculate the value outside of the template and then enter that value in this field. Use the [Annualization and Periodization Calculator](#) to assist you with this calculation.

## Full Base Salary

The full salary amount the employee would earn if they were employed for a full year.

Salary Information		
Period Salary	<input type="text" value="85000.000000"/>	Appointment End Date <input type="text" value="06/30/2024"/>
Full Base Salary	<input type="text" value="85000.000000"/>	

## Appointment End Date – Required when a Period/Contract Salary is entered.

The date the appointment ends. An appointment end date cannot be longer than one year and cannot be later than the visa expiration date. **Note:** Tenured faculty should not have an appointment end date unless their visa expires within the current year.

***All three data fields must be entered as applicable.***

Salary Information		
Period Salary	<input type="text" value="14166.666700"/>	Appointment End Date <input type="text" value="05/31/2024"/>
Full Base Salary	<input type="text" value="85000.000000"/>	

# Job Compensation - Pay Components – All Hire Types

## Salary Type

Use the drop-down menu to select the type of salary an employee receives. Salary types include:

**NAANNL** = Annual Salaried Employees.

- For administrative hires; Officers of Administration and most Support Staff.
- For *Morningside academic* hires, this is only for tenured faculty and officers of the libraries who do not have limited clearance.
- For *CUIMC academic/clinical* hires, this is only for tenured faculty

**CNTRCT** = Contract Employees.

- For *Morningside academic* hires, this is only for faculty with a tenure status of 3 or 4; officers of research; student officers; and officers of the libraries with limited appointments.
- For *CUIMC academic/clinical* hires, this is used for faculty with a tenure status of 3 or 4; officers of research; and student officers.

**LGHRLY** = For HRPC Use Only.

**NAHRLY** = Hourly Salaried Employees (Administrative Positions Only).

- For administrative hires, for Casual employees, Union employees or Non-Union Support Staff.

# Job Compensation - Pay Components – All Hire Types, continued

## Compensation Rate (Annual/Hourly Rate)

Enter the dollar amount of the compensation (the employee/academic officer's regular earnings) using two decimal places. Do not enter the "\$" or commas. Paychecks are generated using this number. If the salary is unknown, leave blank for the approver to enter. If this is a "zero salary appointment", leave this field blank. See next section for more information.

## Compensation Frequency

Defaults per the comp rate code selected and is used by the system to calculate pay. "A" for "Annual" defaults when either **NAANNL** or **CNTRCT** is selected. "H" for "Hourly" defaults when **NAHRLY** is selected.

Salary Information	
Period Salary	14166.666700
Appointment End Date	05/31/2023
Full Base Salary	85000.000000

Job Compensation - Pay Components	
*Salary Type	CNTRCT
Compensation Rate (Annual or Hourly Rt)	85000.000000
Compensation Frequency	A

Job Compensation - Pay Components	
*Salary Type	NAANNL
Compensation Rate (Annual or Hourly Rt)	85000.000000
Compensation Frequency	A

Job Compensation - Pay Components	
*Salary Type	NAHRLY
Compensation Rate (Annual or Hourly Rt)	23.500000
Compensation Frequency	H

# Zero Salary and Zero Stipend Appointments

## Zero Salary/Zero Stipend Appointment

An academic appointment for Officers of Instruction and Officers of Research who work part-time at the University and are not receiving a base salary and for Postdoctoral Research Fellows and Postdoctoral Clinical Fellows not receiving a stipend.

### How does the system know that this is a Zero Salary Appointment or Zero Stipend Postdoctoral Fellow Appointment?

- Select "**CNTRCT**" for the Comp Rate Code and do not enter a salary in the Compensation Rate field.
- In the **Comments** box, enter a note stating that this appointment is "**zero salary**" or "**zero stipend.**"

### Zero Salary/Zero Stipend Appointments and Workflow

- At CUIMC, the 3rd level approver provides the financial review for appointments but does not review \$0 salary/\$0 stipend appointments. These transactions move directly to HRPC *after* 2nd level approval. The template will route directly from the Office of Faculty Affairs to the HRPC.

The screenshot shows a web form with two main sections. The first section, titled "Salary Information", contains two input fields: "Period Salary" and "Full Base Salary", both of which are highlighted in yellow. To the right of these fields is a date picker for "Appointment End Date" set to "06/30/2023". The second section, titled "Job Compensation - Pay Components", contains a dropdown menu for "\*Salary Type" with "CNTRCT" selected, and a text input field for "Compensation Rate (Annual or Hourly Rt)" which is also highlighted in yellow. Below these is a field for "Compensation Frequency" with the value "A" entered. The form has a light blue background with "AWS" watermarks.



# I-9 Form Requirements

## Form I-9 Requirements

All employees receiving salary must complete this form and provide valid original documentation. Employees will not be processed in PAC until they complete their I-9. For more information, including a list of I-9 centers, please visit the [I-9 and E-Verify page on the HR Website](#).

## When is an I-9 Completed?

Section 1 of the I-9 must be completed by the employee on or before the first day of employment. Section 2 must be completed in person within 3 business days of the start date or by the first day of their class for faculty on the Morningside campus.



# I-9 Validation

## How to Confirm Employees Completed an I-9

All I-9s for Columbia University are completed using the Equifax I-9 system. If you have access to that system, you can look up the employee to view and confirm that the I-9 has been completed. For departments that do not have access to Equifax, you should confirm with your employee that they completed this form.

## Validation of their I-9

Once you have confirmed the I-9 is complete, check the box on the TBH.

**Important!** The University does not keep copies of the employee's I-9 receipt nor should it be an attached document to the TBH.

The image shows a screenshot of a form titled "Validation of I-9". The form has a white background with a thin border. At the top left, the title "Validation of I-9" is written in a dark font. Below the title, there is a large, empty rectangular box. To the right of this box, there is a small green square checkbox with a white checkmark inside, followed by the text "Completion of I-9 Validation". The entire form is enclosed in a thin red border.



# Affirmative Action

Affirmative Action clearance for certain administrative positions (all grades) and for all full-time faculty, officers of research, officers of the libraries and certain postdoctoral appointments. Part-time academic personnel do not need clearance so the section for them should be left blank. Visit the [Equal Opportunity and Affirmative Action website](#) for more information.

## Confirm the Affirmative Action Clearance Process Completed and Indicate in TBH

- Administrative hires that require AA clearance are reviewed and approved in TalentLink. For additional details, please review the [How to Manage Offers](#) job aid.
- For academic hires, the clearance type and effective date is listed in the Academic Search and Recruiting (ASR) system. Enter the details, as applicable.
- **AA Clearance** - use the drop-down arrow to select one of the following: Full Clearance or Limited Clearance.
- **Effective Date** - enter the effective date of the clearance. This should be on or before the employee's hire date.
- **Expiration Date** - if the Affirmative Action Clearance is Limited, you will need to enter the Expiration Date of that clearance. Full Clearance does not have an expiration date and thus does not require a date be entered.

Affirmative Action

AA Clearance	Full Clearance	▼
Effective Date	01/19/2023	📅
	Expiration Date	<input type="text"/>



# Clinical Data Fields - For CUIMC Clinical Appointments

The CUIMC Clinical Hire and Rehire templates are used for **ALL** academic personnel, both clinical and non-clinical positions at the Columbia University Irving Medical Center (CUIMC). For clinical positions, complete the clinical data fields on the form. For academic appointments with no clinical role, the clinical data fields are left blank.

- For CUIMC Academic hires, if the hire is in a non-clinical position, you can enter information regarding any research fellowships they completed.

If you do not process CUIMC Academic/Clinical hires, skip the following slides on this specific content and continue with the module.



# CUIMC Clinical Appointments - Postdoctoral Data

There are two Postdoctoral Data sections where you can enter information.

- **Training Type.** Select the type of postdoctoral training the individual completed. Postdoctoral clinical fellow, postdoctoral research fellow or postdoctoral residency fellow.
- **Start Date.** Enter the start date of the postdoctoral training.
- **End Date.** Enter the end date of the postdoctoral training.
- **School Code.** Select the code of the school where the individual completed the postdoctoral training. Codes that begin with an "H" are hospitals and those that begin with an "I" are institutes.
- **School Description.** This field information defaults based upon the school code selected.
- **Program Code.** Select the code indicating the type of postdoctoral program the individual completed.
- **Program Description.** This field information defaults based upon the program code selected.

**Postdoctoral - 01**

Training Type	PD-RSDCY	School Code	H249136
Start Date	07/01/2016	School Name	MA GEN HOSP
End Date	06/30/2022	Program Code	PD-0330
		Program Description	MEDICINE-GENERAL

**Postdoctoral - 02**

Training Type	PD-CLIN	School Code	2562
Start Date	07/01/2019	School Name	NEW YORK UNIVERSITY
End Date	06/30/2022	Program Code	PD-0212
		Program Description	

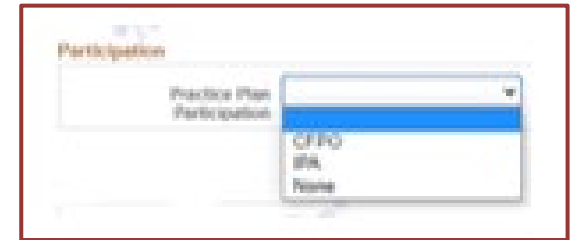


# CUIMC Clinical Appointments - Participation Data and Voting Privileges

## Participation Data

Select the option that indicates the practice plan membership the individual holds.

- **CFPO.** Columbia Faculty Practice Organization.
- **IPA.** Individual Practice Agreement.
- **None.**



## Voting Privileges

Enter the effective date and voting department if the individual has faculty council voting privileges as indicated in the Memorandum of Agreement (MOA).

- **Faculty Council Voting Privileges.** Check the box to indicate the individual has voting privileges.
- **Effective Date.** Enter the effective date of the voting privileges.
- **Voting Department.** Enter the department number where the individual has voting privileges.

A screenshot of a web form titled "Voting Privileges". It contains a checkbox labeled "Faculty Council Voting Privil." which is checked. Below this are two input fields: "Effective Date" with the value "07/01/2023" and a calendar icon, and "Voting Department" with the value "7518101" and a search icon. There are faint "AWS Production" watermarks in the background.



# CUIMC Clinical Appointments - Non-Renewal and Reciprocal Appointments - Cornell

## Non-Renewal Appointment

*This field is completed specifically for those who are in a one-year appointment.*

Enter the Non-Renewal effective date of the appointment for an individual whose appointment *will not be renewed*, otherwise, leave blank. If this applies, the individual will also receive a letter of non-renewal.

Appointment

Non Renewal Eff Dt

## Reciprocal Appointment - Cornell

Select the individual's **Home Institution** (required field).

- For those who *do not have reciprocal appointments*, select **Columbia** as the Home Institution.
- For those who *do have a reciprocal appointment with Cornell*, select **Columbia** or **Cornell** as the Home Institution as applicable.

Reciprocal Appointments - Cornell

AWS Home Institution

Columbia  
Cornell



# CUIMC Clinical Appointments - Hospital Affiliation

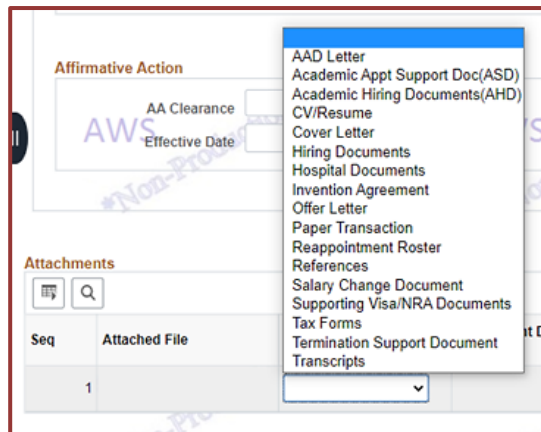
There are up to three Hospital Affiliation sections to enter information about where our faculty member is practicing.

- **Appointment Type.** Select from the drop-down the type of appointment the individual holds. Choices include Hospital Affiliate, Medical Service Agreement (MSA) or Reciprocal. *If the individual holds a reciprocal appointment with Cornell, "Reciprocal" will be selected here.*
- **Affiliated Hospital.** Select the hospital where the individual holds the affiliation.
- **Hospital Hire Date.** Enter the hire date of the hospital appointment.
- **Hospital Appointment End Dt.** Enter the end date of the hospital appointment.
- **Service Code.** Select the service code that indicates the type of service performed for the appointment. **Description** - defaults from entry.
- **Hospital Title.** Select the hospital title code that indicates the title the person holds at the hospital. **Description** - defaults from entry.
- **Position Effective Dt.** Enter the hire date of the position.
- **Admitting Privileges.** Check this box if the person has admitting privileges at the hospital.
- **Visiting Fellow Rotator.** Check this box if the person is a visiting fellow rotator at the hospital.
- **Cornell Univ Title.** Select the Cornell University title, if applicable. Access the *Cornell University Titles Job Aid* on the HR Website for more information.
- **Description.** This field information defaults based upon the Cornell University title code selected.



# Documentation Requirements

The required documentation for the hire/rehire is attached to the template. Gather the required documents and scan them by category into single files. These files are then uploaded to the template. Be sure to attach all documents as the HRPC will recycle the transaction back if any documents are missing.



Once the hire is processed in PAC, stored documents can be viewed via the main menu in Manager Self Service > Job and Personal Information > Attachments.



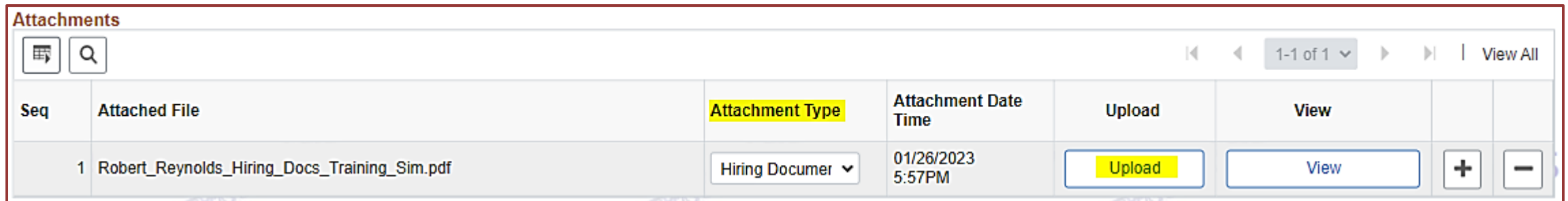
Reference the [Attaching Documents in Template-Based Hire Job Aid](#) for the complete list of documents, their category, and the order in which they must be attached.

Reference the [TalentLink – How to Obtain and Attach Hiring Documents to a TBH or PAF](#) for the steps on how to attach hiring documents from TalentLink to a TBH or a PAF.

# How to Attach Documents

Select the **Attachment Type** from the drop-down menu to indicate what type of file is attached.

Select **Upload** and locate the saved file on your device. Select **Choose File** to locate and select the saved file. Select **Upload** again to attach the document.



Seq	Attached File	Attachment Type	Attachment Date Time	Upload	View		
1	Robert_Reynolds_Hiring_Docs_Training_Sim.pdf	Hiring Documer	01/26/2023 5:57PM	Upload	View	+	-

Select “+” to open another row to add another document. Select “-” to delete an uploaded document.

Select “**View**” to view the uploaded document. Note this button is only active until the transaction is submitted. Once the transaction is submitted, attached documents are viewed elsewhere.

**Important!** Do not save documents with a very long title as this may "push out" the "+" and "-" buttons from the screen and thus prevent you from being able to access those buttons.



# Add a Comment

Every template has a **Comment** section to add notes to the TBH that are viewable to all roles (Initiator, Approver, and HRPC).

Enter text into the field. The comment is visible when the form is opened and viewed and does not display in the approver worklist page. Comments are viewable to all roles in the transaction workflow unless they are deleted. Once the HRPC adds the employee to PAC, the TBH is no longer viewable or retrievable.

The icon to the right of the text box opens the comments in a separate window.

The screenshot shows a form section titled "Comments" in a dark red font. Below the title is a large, empty text input field with a blue border. To the left of the input field, the word "Comments" is written in a yellow box. To the right of the input field, there is a small yellow icon consisting of a square with a plus sign inside, which is used to open the comments in a separate window.

# Review Entry/Bottom of Template Action Buttons

Before moving to page 2 of the template (accessed via the Labor Accounting tab on the top) where you complete the Labor Accounting details and submit the TBH to the approvers, review the entered data, make any needed changes, and confirm that all required documents are attached.

**Important!** Save your entries using *Save for Later* before navigating between pages or the data entries and documents will be removed.

## Action Buttons on the Bottom of Page 1

**Return to Enter Transaction Details Page** returns you to the prior page of the template where the Hire Date is entered. Ensure that you save entered data (Save for Later) before moving between pages.

Use **Quit Without Saving** to remove any data entered including documents attached, *since it was last saved* and returns you to the home page under *Transactions in Progress*. It does not delete the TBH from your draft hires or workflow, it keeps the template as it was when it was last saved.

**Save and Submit** is disabled until page 2 of the template is completed.

Save your progress using **Save for Later**. Return to the draft template from the home page under *Transactions in Progress*.

Click **Print** to export the template for printing into a PAF format.

Use **Go to Top of page** to navigate to the top of the page without using the scroll bar.

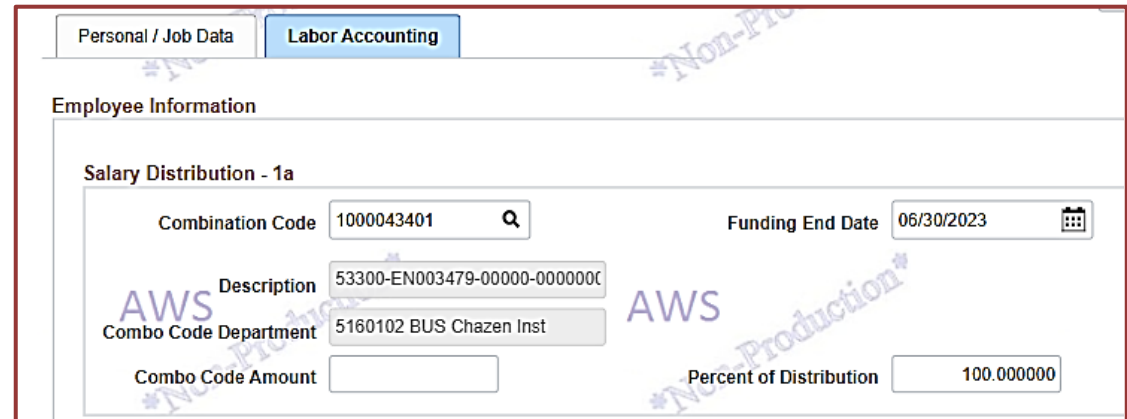
The diagram shows a row of buttons: "Return to Enter Transaction Details Page" (disabled), "Save and Submit" (disabled), "Save for Later", and "Quit Without Saving". Below this row are "Print" and "Go to Top of page".



# Complete Labor Accounting Information and any Additional Compensation on Page 2

To navigate to page 2, click the **Go to Top of Page** button (if you're at the bottom of the page), or scroll to the top.

Click the **Labor Accounting** tab. Edits will run to check all required fields were completed. Review any error messages that appear and make any corrections, as needed.



On page 2, enter the Salary Distribution which is required for template submission and enter any Additional Compensation payments known at the time of hire (if applicable). If an additional compensation is added, please note it in the Comments section, "Add Comp included."

The [PAC Template-Based Hires and Labor Accounting module](#) is the next module in the TBH course and teaches you how to complete this page.



# Submit the Transaction

Now that the template is complete, click **Save and Submit** from the bottom of the template, then click **OK**. The transaction will move into the approver's worklist (specified by the admin department indicated in the TBH) and will be removed from the *Draft Hires to Process* section of your main page.

Once you submit the transaction into workflow, you cannot access it or retrieve it unless the 1st level approver recycles it back to you.

Smart HR Transactions

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**Submit Confirmation**

✓ The Hire/Rehire transaction has been saved and sent to the 1st Approver in the Home department for approval.

# Hire/Rehire Status Page

Access the **Hire/Rehire Status** page from the left menu.

If you are no longer in the application, remember that you navigated here using the *MSS* and *HR Transactions* tiles from the PAC Homepage.

The screenshot shows the 'Hire/Rehire Status' page. The left sidebar has 'Hire/Rehire Status' highlighted. The main area has a title 'Template Based Hire/Rehire Status' and a subtitle 'The following transactions are pending, canceled or have been processed by Human Resources.' Below this are filters: 'HR Review Status' (dropdown), 'Transaction Type' (dropdown), 'Transaction Status' (dropdown), and 'Start Date From' (01/22/2023) to 'To' (02/11/2023). There are 'Refresh' and 'Clear' buttons. A table below has columns: Select, Transaction Type, Effective Date, Transaction Status, Name, Person ID, and Action. One row is visible: Anita May, Hire/Rehire, 01/30/2023, Pending Approval, NEW, Hire. A red box highlights the 'Transaction Status' filter and the 'Pending Approval' status in the table.

Here you can see a **view only** snapshot of statuses for TBHs that you submitted as the initiator. They cannot be accessed, and you will not see other initiator's submissions. If you are also an approver, you can see transaction statuses in the *Worklist Status Page* and *Workflow Status Page*. Reference the [PAC Approver Training](#) for more information. Statuses provided:

- *Pending approval* means that the transaction is in workflow and pending approval by an approver.
- *Requested* means that the transaction is pending processing by the HRPC.
- *Cancelled* means that the transaction was denied by an approver or the HRPC.
- *Processed* means that the transaction was processed by the HRPC.

Transaction Type	Effective Date	Transaction Status	Name
hire	12/14/2022	Draft	Njdtre
hire	01/01/2023	Hired/Added	Ljdt
hire	01/06/2023	Pending Approval	Qrh
hire	01/10/2023	Requested	Gqy

# Transaction Touch Points and Dates

CUIMC Pay Calendar for July 2022 to June 2023									
Type of Payroll	Pay Run ID	Period Covered	PAC Electronic & SharePoint Transactions	PAC	FFE/Time & Labor Entry Period	Labor Accounting Add Comp		View on Web Date	Check Date
			CUIMC Mail Closing Date	Auto-Term Dates		Dept. Admin. Level 1 Approval	CUIMC Final Approval		
Weekly	WKL-22-026	06/20/22-06/26/22			06/22/22 - 06/27/22			06/29/22	07/01/2022
Semi-Monthly	SMP-22-013	07/01/22-07/15/22	Fri 06/24/22	Wed 07/06/22		Fri 07/01/2022	Fri 07/08/2022	07/13/22	07/15/2022
Biweekly	BWK-22-027	06/20/22-07/03/22	Mon 06/27/22		06/29/22 - 07/01/22			07/06/22	07/08/2022

## Transaction Touch Points and Dates

- *Initiated Date* is system generated when the transaction is created.
- The transaction then goes to the 1st level home department for approval and then to any 1st level foreign department approvers if indicated by the combination codes entered (on page 2 of the template).
- If final approval occurs in advance of the *PAF, Nomination Forms & TBH Date (Morningside)* or *PAC Electronic & SharePoint Transactions Date (CUIMC)* listed for the pay period, HRPC can complete the manage hire process in time for the employee to receive a paycheck as of the *Check Date* listed along with any retroactive pay due. The employee will also be assigned an employee ID and will be able to enroll in Columbia University Benefits (as eligible).
- If the template receives final approval *after* the *PAF, Nomination Forms & TBH Date* for a pay period, the hire process completes, however, the employee will not receive pay until the following pay period.

Visit the [HR Forms and Documents page on the HR Website](#) to view the Payroll Calendars.



# Template-Based Hires Workflows and Approvers

The submitted template requires several levels of approvals based upon the hire type and funding department(s). All TBH transactions should have at least two different individuals approve the transaction. Therefore, approvers may act upon a TBH at level 1 or level 2, but **the same approver cannot approve at both levels 1 and 2**. For more information on workflows, reference the [\*PAC Basics for Transactors\*](#) course.

## Key Points:

- The 1<sup>st</sup> level of approval is within the administrative department. Earnings charged outside the admin department are routed for approval to the foreign funding departments. Once the final approver approves the TBH, it moves to the HRPC for processing in PAC.
- Only the Initiator or 1<sup>st</sup> level approver in the admin department can make changes to a template. Subsequent approvers can add a comment but if a change is required, the template must be recycled to the admin department 1st level approver to do so. The admin department approver can recycle the transaction to the Initiator if desired. Once updated, it is submitted through the workflow for approval.
- The 2<sup>nd</sup> and 3<sup>rd</sup> level approval is dependent upon the hire type and campus. See next slide for details.



# TBH Workflows and Approvers – Campus Differences

## Campus Differences

### CUIMC:

- Academic hires/rehires (excluding student officers) are approved at the 2nd level by the Office of Faculty Affairs and at the 3rd level by the Controller's Office (Payroll).
- Administrative and student officer hires/rehires are approved at the 2nd level by the Controller's Office (Payroll) at CUIMC which is their final approval. They do not require a 3<sup>rd</sup> level of approval.

### Non-CUIMC:

- Academic hires/rehires are approved at the 2<sup>nd</sup> level by the school or department and at the 3rd level by the Provost's Office (excluding student officers).
- Administrative and student officer hires/rehires are approved at the 2<sup>nd</sup> level approval by the school or department which is their final approval. They do not require a 3<sup>rd</sup> level of approval.

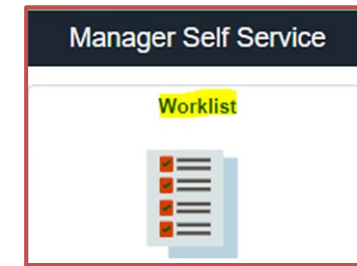
# Approve the TBH

Approvers access submitted transactions from the **Worklist**, accessible from the Home page tile. You also receive an e-mail notification. Reference the [PAC Approver Training](#) course for more information on approving HR transactions.

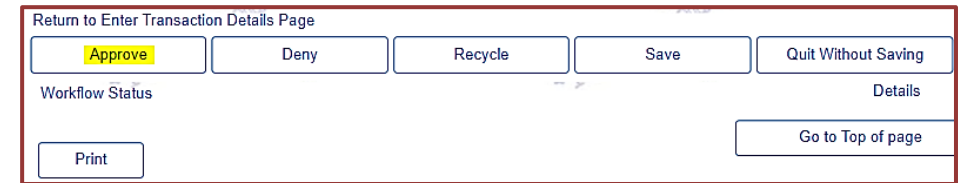
**1<sup>st</sup> level approvers** approve the TBH and can make updates to templates or recycle them to the Initiator.

**Subsequent level approvers** cannot make updates to templates. They can add a comment and recycle it back to the 1<sup>st</sup> level approver if needed.

You can also **Deny** (rare), **Save** (any entries or comments entered), or **Quit Without Saving** (leave the TBH to get back to it later).

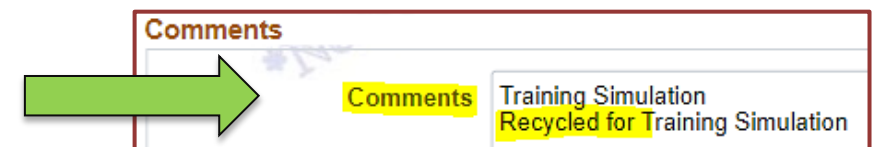
A screenshot of the 'Worklist Items' table. A green arrow points to the second row of the table.

Department	Department Name	Type of Trans	Effective Date
5110102	Graduate School of Business	Hire/Rehire Recycled	01/01/2023
5160102	Grad	Hire/Rehire Home Dept Approval	01/30/2023



## For Recycled Transactions

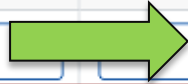
**1<sup>st</sup> level approvers** access transactions recycled by subsequent approvers from the **Worklist**. Be sure to read the comments about the needed edits.



# Approvers - Confirm Template Data

Compare the page 1 template entries to the attached documents (click **View**) to ensure accuracy and completeness.

Attachment Type	Attachment Date Time	Upload	View
Customer	02/01/2023 2:58PM	Upload	View



If documents are missing or you have additional documents to attach, you may upload them to the template or recycle to the initiator to attach.

Verify that the Form I-9 has been completed. Remember to add the date that Section 2 was completed on the Comments section as "I-9 completed MM/DD/YYYY".

## Review the Labor Accounting Information on Page 2

- Click the **Labor Accounting** tab on the top of the page. Review any error messages that appear, and make any corrections, as needed.
- Confirm the Salary Distribution. If the allocation was to a sponsored project, ensure supporting documentation is attached.
- Confirm any Additional Compensation payments known at the time of hire - if applicable.

Reference the [PAC Template-Based Hires and Labor Accounting module](#) for more information on completing page 2 of the TBH.

# Recycled TBHs – The Initiator Home Page and The Approver Worklist

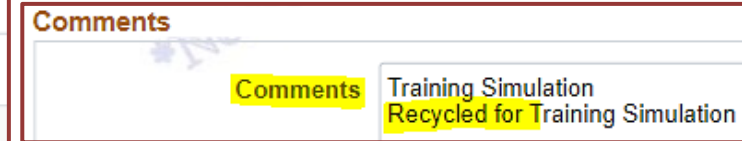
When a TBH is recycled, it is accessed in different locations depending on who is opening it. You will receive an e-mail notification. Be sure to read the comments about the needed edits.

## Initiators

**Initiators** access TBHs recycled to them by 1<sup>st</sup> level approvers from the *Hire/Rehire Employee* home page in the **Transactions in Progress** section, along with the draft TBHs. You will receive an email notification.



Select	Transaction Type	Effective Date	Name
<input type="checkbox"/>	HIRE	01/30/2023	Ar

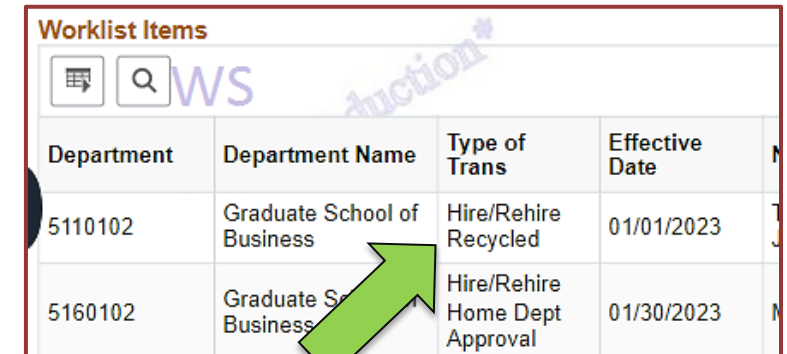
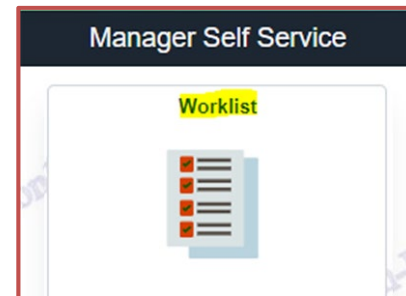


Comments
Training Simulation Recycled for Training Simulation



## Approvers

**1<sup>st</sup> level approvers** access transactions recycled to them by subsequent approvers from the **Worklist**. You will also receive an email.



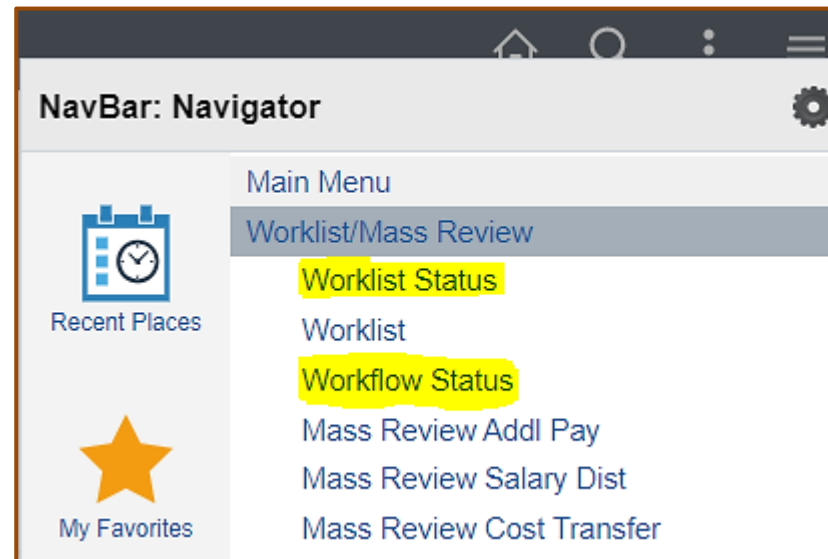
Department	Department Name	Type of Trans	Effective Date
5110102	Graduate School of Business	Hire/Rehire Recycled	01/01/2023
5160102	Graduate School of Business	Hire/Rehire Home Dept Approval	01/30/2023



# Worklist Status – Approver View

This page provides a *view only* summary of pending, cancelled (denied) and processed TBHs. If a TBH was submitted into workflow, its status is viewable on this page. Action cannot be taken from this page.

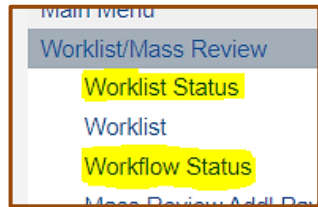
- **Pending Transactions** displays transactions that are pending approval by an approver or pending processing by the HRPC.
- **Cancelled Transactions** displays transactions that were denied by an approver or the HRPC.
- **Processed Transactions** displays transactions that were processed by the HRPC.



This page is similar to the *Hire/Rehire Status* page for Initiators. View that topic for a description of the sections.

# Workflow Status – Approver View

**Workflow Status** provides the location of transactions currently in workflow. It is not viewable to the Initiator Only role. If you do not hold an approver role, contact a department approver(s) to locate this information.



**Workflow Status Page Filter** - you can enter criteria into one of the filters on the top of the page to locate a specific transaction or group of transactions.

**View Transaction Details and Workflow Status** - select the **Details** link next to the item. The top of the page displays the overall transaction status.



User ID	Department (Foreign)	Approval Action	Action Date
Pve,Fywqfmdvqw		Pending	
Fbmq,Njzm		Pending	
Fbmq,Jwcvhmd		Pending	

**Workflow Routing Section** - lists which approvers can review the transaction at the level indicated.



# HRPC and the Manage Hire Process

HRPC is the Human Resources Processing Center and are the final step to adding a new hire in PAC. Once the Manage Hire Process is complete, the employee's personal, job, and tax information is added into the PAC system and the template no longer exists in its format.

If upon review, there is missing information, the HRPC will recycle it back to the 1<sup>st</sup> level approver for updates. Note: it is rare that HRPC will deny a transaction and will consult with a level 3 approver prior to denial.

Once employees are added to PAC, you can view their information in MSS (Manager Self-Service). You will also see that the employee appears on the Processed Transaction section of the Worklist Status Page. Initiators will see this on the Hire/Rehire Status Page.



# Confirm the Employee is in PAC

## Initiators

If you submitted the TBH, you could see the employee was added to PAC if the Transaction Status in the *Hire/Rehire Status* page = **Hired/Added**. You will also see their Employee ID in the *Person ID* column.

Transaction Type	Effective Date	Transaction Status	Name
Hire/Rehire	10/01/2022	Hired/Added	Wgsyl

## Approvers

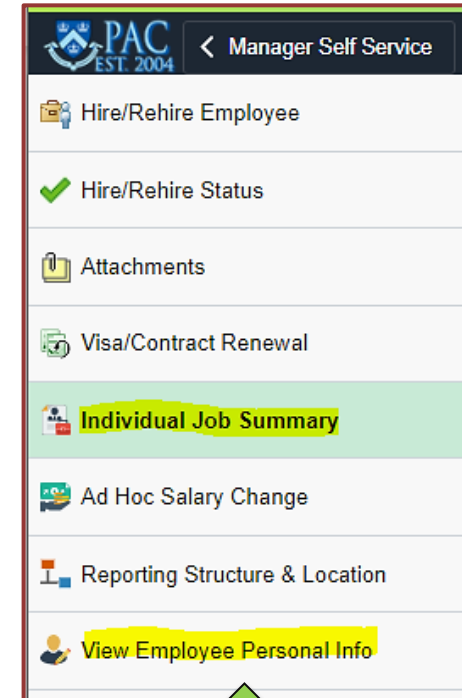
You can see the employee was added to PAC system once their name appears on the *Processed Transactions* section of the *Worklist Status* page. You will also see their Employee ID in the *Person ID* column.

# MSS - View Employee Personal Information

In **Manager-Self Service (MSS)**, you can view employee's personal and job information via the View Employee Personal Info and the Individual Job Summary pages.

The *Employee Information page* displays addresses, phone numbers, emergency contacts, job summary and where you can generate a Personnel Action Form (PAF).

1. Click **View Employee Personal Info** from the left menu (of the HR Transactions tile page).
2. Change the **date** (if needed). The date defaults to today's date and you can change it to an earlier date if you want to see data from a prior time period for viewing non-active faculty and staff. If the date was changed, click the **Refresh Employees** button and the employee list will refresh, displaying active employees as of that date.
3. Click the **Select** button next to the employee's name (the employee information appears).



**Employee Selection Criteria**  
Select the employee whose job and personal information you want to review. You will be able to process on

As Of Date

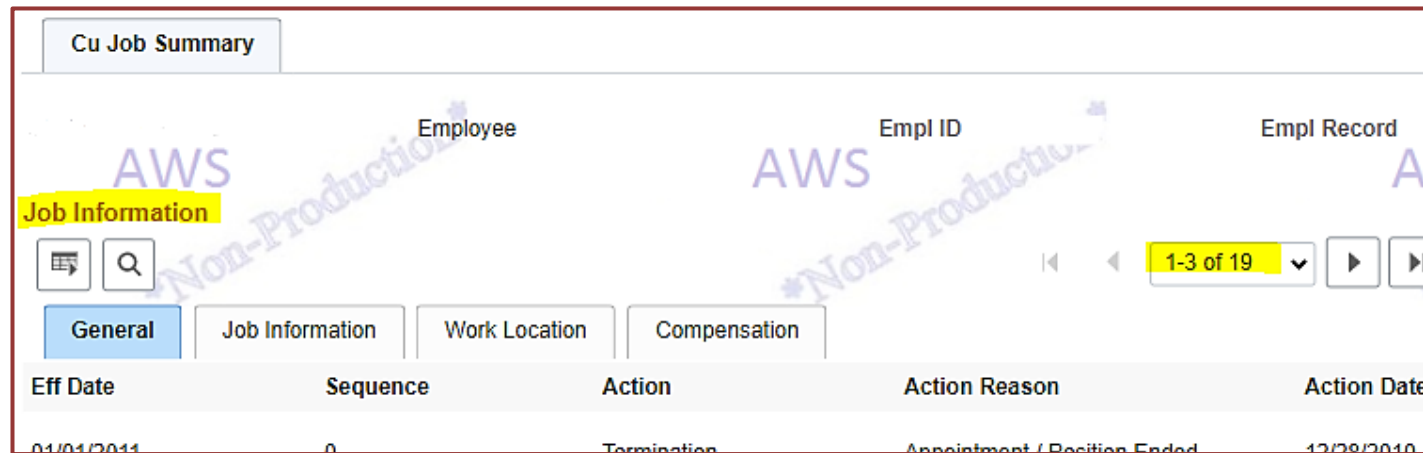
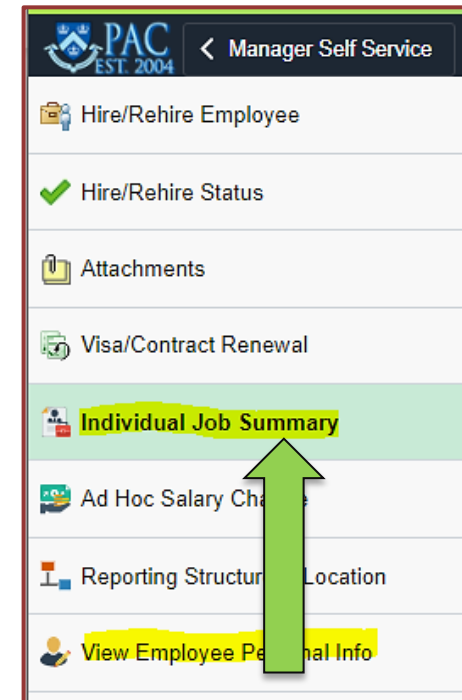
Select	Name
<input type="button" value="Select"/>	-9
<input type="button" value="Select"/>	Aa
<input type="button" value="Select"/>	Aa

# MSS - View the Individual Job Summary

The *Individual Job Summary* page displays a summary overview of history on a specific position. You will see changes to position data, action reasons, effective and status dates, department and job codes and budgeting information. This can also be accessed via a link within the Employee Personal Information.

1. Click **Individual Job Summary** from the left menu (of the HR Transactions tile page).
2. **Search** for the employee and then select the employee from the list that displays.

Use the navigation arrows or *View All* link to view historical data.

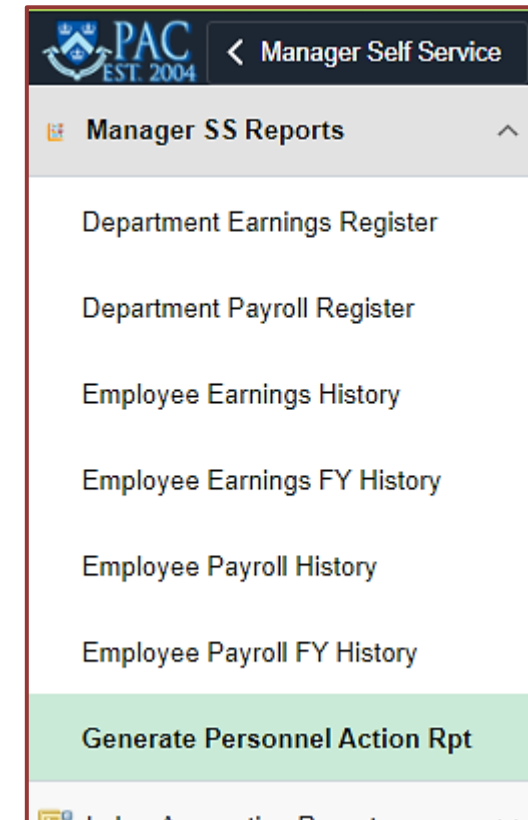


Eff Date	Sequence	Action	Action Reason	Action Date
01/01/2011	0	Termination	Appointment / Position Ended	12/29/2010

# MSS - View Employee in a Personnel Action Report

The *Personnel Action Report* lists employees in your department who had a transaction action date in the current month. It displays the Employee's Name, ID, Status, Department, Position, Annual Rate, Action Reason Codes, Action and Effective Dates. In the first week of every month, only the preceding month's data is available.

1. Open the **Manager SS Reports** tile from the Manager Self Service home page.
2. Select **Generate Personnel Action Rprt.**





# Getting Help

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## Questions?

Speak with your manager to discuss hiring for your department.

Visit the [HR Manager Toolkit](#) for information on processing HR Transactions.

For HR inquiries regarding Hires/Rehires, contact the [Human Resources Service Center](#).



# Module Completion

## Congratulations

You have completed the *Template-Based Hires – Page 1* module.

The *Template-Based Hires Course* has another module: *Template-Based Hires and Labor Accounting, Page 2 of the Template*, which has an associated knowledge assessment that requires a passing grade of 90% to receive credit for the course and to gain access to TBH in PAC.

Click on the “X” in the upper right corner to close out of this module where you can launch the next module.