Hire Form (Staff)

When to use

Use this procedure to hire or re-hire Boston University (BU) staff into a vacant position.

Note: If the employee you are hiring is already active in SAP, process a Position Change (same manager or payroll coordinator) or Transfer form (different manager *and* payroll coordinator) instead.

Warning: HR Talent Recruitment Services processes Hire forms for staff members recruited through Talent Recruitment Services. If you are unsure whether to process a Hire form for an employee, contact your department HR liaison or your HR Talent Recruitment Services point of contact.

Before you begin

Ensure any necessary organization management (OM) forms have been submitted and approved before submitting the personnel actions form. See the BUworks Form Decision Guide for a complete list of forms necessary for each action type.

Collect the following information from the employee:

- Social Security Number
- BU ID (if employee has a previous affiliation)
- Legal First Name (no nicknames)
- Legal Last Name
- Date of Birth
- Legal Gender
- Country of Citizenship
- Personal Email (non-BU email)
- Home Address

You will need the following additional information:

- Effective date of hire (*i.e.*, the date the employee will begin working)
- Position number to be filled
- Office Address and Phone Number
- Work Schedule Rule
- Assignment Duration
- Percent Time
- Basic Pay (Hourly Rate or Semi-Monthly Amount)
- Mail Code
- Cost Distribution (if different from what was entered on corresponding OM form; if grant funded, this information must be entered)

Incorrect information will result in longer processing times and may cause your form to be returned or rejected.

To prevent late payment to an employee, pay careful attention to the form deadlines and plan accordingly.

Note: If hiring a student employee into a staff position, Student Payroll will need to terminate the individual from the Student Employee level prior to hiring. See the Student Employment Office website for instructions. The termination cannot be processed prior to the student's graduation date. All hires must be processed *after* the student's graduation date; the effective date of the hire cannot be retroactive.

References

- If a new position is required for this hire and the position does not yet exist in SAP, complete the Create Position form before proceeding.
- If an existing, vacant position is required for this hire and the position has not been opened in SAP, complete the Maintain Position form before proceeding.
- Click here for the Data Dictionary

Hire Form (Staff): Step-by-Step

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Log into BUWorks using your BU login and Kerberos password at the following URL: https://ppo.buw.bu.edu</td></tr>
<tr><td>2</td><td>Once you are logged in, click on the tab relevant for your role in SAP:
<table><tr><th>IF your role is…</th><th>THEN click the…</th></tr><tr><td>Manager</td><td>Manager Self-Service tab</td></tr><tr><td>Payroll Coordinator</td><td>Payroll Coordinator tab</td></tr></table>
Note: If you are both a manager and a payroll coordinator, select the Manager Self-Service tab if you are taking action for a direct report. Otherwise, use the Payroll Coordinator tab.</td></tr>
<tr><td>3</td><td>Click the Hiring - Staff hyperlink.

Note: Based on your privileges, you may also see a Hiring - Faculty (All Ranks) hyperlink. Forms must be completed one at a time; do not open multiple forms in multiple tabs.

Result: A new window will open with the Hire form</td></tr>
<tr><td>4</td><td>In the Date of Hire field, enter the date the work performed was (or will be) completed in mm/dd/yyyy format. If preferred, click the Calendar Lookup icon to select the effective date of hire from the calendar.

Note: The listed tabs are specific to compensated staff. If hiring a non-compensated staff member, fewer tabs will be available, but the instructions for those tabs remain the same.

Warning: To avoid potential delays in payment to the employee, take note of the assigned PA deadline for the intended pay period and plan accordingly.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Complete the UID/Social Security Number (SSN) field:
<table>
<tr><th>IF hiring…</th><th>THEN …</th></tr>
<tr><td>An employee who has a previous BU employment AND the BU ID is known</td><td>Enter the employee's UID

Note: If an error results, use the SSN instead</td></tr>
<tr><td>An employee who has a previous BU affiliation AND the BU ID is <u>not</u> known</td><td>Enter the employee's SSN</td></tr>
<tr><td>A new employee who is a US citizen and has no previous BU affiliation</td><td>Enter the employee's SSN</td></tr>
<tr><td>An ISSO-sponsored foreign national without a SSN</td><td>Enter the BUID assigned to the employee by the ISSO office, and
Select the ISSO Sponsored Employee Hire checkbox.
Warning: If you are prompted for a SSN, enter 999999999. If you encounter any issues, email hrsys@bu.edu.</td></tr>
<tr><td>An ISSO-sponsored foreign national with a SSN</td><td>Enter the BUID assigned to the employee by the ISSO office, and
Select the ISSO Sponsored Employee Hire checkbox.</td></tr>
</table></td></tr>
<tr><td>6</td><td>Click the Begin Hire button.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>There are 2 options for identifying the position the employee will be hired into:

Option 1 – you do not know the position number being hired into
Select an Org. Unit from the Select Organization dropdown menu
Select an available position from the Select Position dropdown menu
Leave Position Number blank
Option 2 – you know the position number being hired into
Skip the Select Organization dropdown menu
Skip the Select Position dropdown menu
Enter the position number in the Position Number field
Warning: If the position number does not appear in the dropdown, or you receive an error that the position is not vacant, cease processing and 1) check to be sure the position was opened via OM form and, 2) there is no holder as of the effective date of the Hire form. If the position is not open, you will need to process a Maintain Position form. If the position is not vacant, you will either need to terminate the current holder (if appropriate) or identify a different vacant position for the employee being hired.</td></tr>
<tr><td>8</td><td>Click the Proceed to Details button.

Result: the position's details are displayed in the Position Information section.</td></tr>
<tr><td>9</td><td>Select the reason for hire from the Hire Reason dropdown menu.

Warning: The position's details appear automatically and cannot be edited.</td></tr>
<tr><td>10</td><td>Confirm the position details are as expected. These details drive access to time entry, benefits eligibility, and compensation structure so it is critical they are correct.

If you think there is an issue, cease processing the form and contact HR Compensation (hrcomp@bu.edu). Include the tracking number of the OM form you used to maintain the position.</td></tr>
<tr><td>11</td><td>Click Next Step.</td></tr>
</table>

Step	Action
12	Complete the fields in the **Personal Data** section, as required and applicable: • First name • Middle Name • Last Name • Suffix • Date of Birth (mm/dd/yyyy) • Gender ***Note:*** If an employee is non-binary, contact HR Information Systems (hrsys@bu.edu) for next steps. • Personal Email ***Note:*** The personal email address will be used for automated onboarding emails and identity matching, if applicable. • Country of Citizenship ***Note:*** • Required fields are indicated by a red asterisk (*) • The last 4 digits of the SSN will appear on this tab; however, the SSN is not editable. • Data entered on this tab is used to match employees with previous BU affiliations with their previous records. Accurate information on this tab is critical to reduce the risk of creating a duplicate BU ID, thus slowing down the employee's onboarding process. ***Information:*** This data is needed for tax purposes and third-party vendors so it must represent the employee's legal name (no nicknames) and the employee's sex as stated on the employee's legal documents. If the employee identifies as transgender or non-binary, and their legal documents do not match the name or sex they use publicly, contact HR Information Systems (hrsys@bu.edu) for next steps regarding public display of the employee's name.
13	Click **Next Step**.

Step	Action
14	Complete the fields in the **Home Address** section: • House Number and Street • City • State • Zip Code • Country • Home Telephone Number ***Note:*** • Required fields are indicated by a red asterisk (*) • Double check the home address is entered correctly – the input will be used for tax forms. ***Warning:*** If the employee has a foreign address, enter the US residential or work address. Once the form completes workflow, submit a request to hrsys@bu.edu to update the address in SAP. Provide the employee's BU ID number, name, and foreign address. Employees will not be able to update their own address online if they live internationally; if an update is needed, the employee should email hrsys@bu.edu.
15	Click **Next Step**.
16	Select the appropriate building where the employee will be located in the **Building** dropdown menu in the **Office Address** section.
17	Enter the office phone number of the employee in the **Office Telephone Number** field. If unknown, use a main or general department phone number.
18	Click **Next Step**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19</td><td>
<table>
<tr><th>IF you want to edit…</th><th>THEN…</th></tr>
<tr><td>Work Schedule Rule</td><td>Select the appropriate schedule from the Work Schedule Rule dropdown menu. This drives the days an employee can enter time and/or time off requests, as well as how many hours per day an employee’s full-time schedule is.</td></tr>
<tr><td>Assignment Duration</td><td>Select the appropriate duration from the Assignment Duration dropdown menu.</td></tr>
<tr><td>Percent time employed</td><td>Enter the appropriate percent time in the Percent Time Employed field.
Click the Calculate Working Hours button and confirm the number of hours worked per week is correct.
If the hours worked per week are incorrect, adjust the percent time.</td></tr>
</table>
Warning: If you receive an error that the assignment duration/percent time does not match the employee group/subgroup, this indicates the position setup conflicts with what has been entered under assignment duration and/or percent time. Using the Position Information tab, confirm the employee group correctly reflects full-time (100% time) or part-time (under 100% time), and the employee subgroup matches with the assignment duration. If the setup is not as expected, confirm the most recently processed OM form for the position completed workflow. If the form completed workflow, contact HR Compensation (hrcomp@bu.edu) to discuss.
</td></tr>
<tr><td>20</td><td>Click Next Step.</td></tr>
<tr><td>21</td><td>Confirm the pay scale type, pay scale group, and payroll accounting area are accurate. If they are not, cease processing and confirm the most recently processed OM form for the position completed workflow. If the form completed workflow, contact HR Compensation (hrcomp@bu.edu) to discuss.</td></tr>
<tr><td>22</td><td>
<table>
<tr><th>IF the position is…</th><th>THEN enter…</th></tr>
<tr><td>Exempt</td><td>The semi-monthly pay period amount</td></tr>
<tr><td>Non-exempt</td><td>The hourly rate</td></tr>
</table>
</td></tr>
<tr><td>23</td><td>Click the Calculate Annual Salary button and confirm the result is what you expected. If it is not, check to be sure the assignment duration, percent time, work schedule rule, and salary information are accurate.</td></tr>
<tr><td>24</td><td>Select the appropriate mail code from the Mail Code dropdown menu.</td></tr>
<tr><td>25</td><td>Click Next Step.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>26</td><td><table><tr><th>IF…</th><th>THEN…</th></tr><tr><td>You want to edit the cost distribution</td><td>Proceed to the next step.</td></tr><tr><td>No edits are required</td><td>Proceed to step 29.</td></tr></table></td></tr>
<tr><td>27</td><td>Select the reason for changing the cost distribution from the Reason dropdown menu.</td></tr>
<tr><td>28</td><td>Complete the cost distribution fields, as appropriate:
Cost Center
Order Number
WBS Element
Percentage
End Date
Warning: The Total Percentage must equal 100%.</td></tr>
<tr><td>29</td><td>Click Next Step.</td></tr>
<tr><td>30</td><td>Complete the following fields in the Recurring Payments section for each approved payment that needs to be paid over more than one pay period:
Wage Type
Amount
Cost Center, Internal Order, or WBS Element
End Date
Note: You will need to attach approval for each recurring payment in the Attachments section (Step 47).</td></tr>
<tr><td>31</td><td>Click Next Step.</td></tr>
<tr><td>32</td><td>Complete the following fields in the Additional Payments section for each approved one-time payments to be made within a single pay period:
Wage Type
Amount
Cost Center, Internal Order, or WBS Element
End Date
Note: You will need to attach approval for each additional payment in the Attachments section (Step 47).</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>33</td><td>Click Next Step.</td></tr>
<tr><td>34</td><td>
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>Education section is visible</td><td>Proceed to the next step to enter optional, but encouraged, education information
OR
Proceed to step 37 if skipping this section</td></tr>
<tr><td>Education section is not visible (Temporary Staff and Faculty Additional Assignments)</td><td>Proceed to step 37</td></tr>
</table>
</td></tr>
<tr><td>35</td><td>Complete the fields in the Education section as follows. This entry should be based on the employee’s highest degree obtained:
<table>
<tr><th>Field</th><th>Entry</th></tr>
<tr><td>Education Est.</td><td>Select the type of institution from the dropdown menu</td></tr>
<tr><td>Inst. Country/State</td><td>Select the country (if outside the US) or state (if within the US) of the institution from the dropdown menu</td></tr>
<tr><td>Institute</td><td>Select the institution from the dropdown menu</td></tr>
<tr><td>Degree/Certificate</td><td>Select the type of degree or certificate from the dropdown menu</td></tr>
<tr><td>Field of Study</td><td>Select the applicable field of study from the dropdown menu</td></tr>
<tr><td>Date Degree obtained</td><td>Enter the date the degree or certificate was obtained</td></tr>
</table>
</td></tr>
<tr><td>36</td><td>Click Next Step.</td></tr>
<tr><td>37</td><td>
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>The staff member has a signed patent policy agreement</td><td>Proceed to the next step</td></tr>
<tr><td>The staff member does not have a signed patent policy agreement</td><td>Proceed to step 43</td></tr>
</table>
</td></tr>
<tr><td>38</td><td>Select the appropriate option from the Corporate Function 1 dropdown menu.</td></tr>
<tr><td>39</td><td>Enter the date the patent policy was signed in the Acquired On 1 field.</td></tr>
<tr><td>40</td><td>
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>There is a second corporate function</td><td>Proceed to the next step</td></tr>
<tr><td>There is NOT a second corporate function</td><td>Proceed to step 43</td></tr>
</table>
</td></tr>
<tr><th>Step</th><th>Action</th></tr>
</table>

<table>
<tr><td>41</td><td>Select the appropriate option from the Corporate Function 2 dropdown menu.</td></tr>
<tr><td>42</td><td>Enter the date the corporate function was acquired in the Acquired On 2 field.</td></tr>
<tr><td>43</td><td>Click Next Step.</td></tr>
<tr><td>44</td><td>
<table>
<tr><th>IF hiring…</th><th>THEN…</th></tr>
<tr><td>A returning BU employee with a break in continuous service</td><td>Enter the employee's original hire date in the Adjusted Service Date field
If unknown, leave as is
Click Next Step</td></tr>
<tr><td>A new employee</td><td>Click Next Step</td></tr>
</table>
</td></tr>
<tr><td>45</td><td>Enter comments related to any discussions with your HR Business Partner or Compensation Analyst about the position that are relevant to the Hire itself.</td></tr>
<tr><td>46</td><td>Click Next Step.</td></tr>
<tr><td>47</td><td>Upload relevant documentation in the Attachments section. Please refer to the matrix if you need assistance determining what is required for attachments.
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>There are documents to attach</td><td>Proceed to the next step</td></tr>
<tr><td>There are no documents to attach</td><td>Proceed to Step 54</td></tr>
</table>
Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</td></tr>
<tr><td>48</td><td>Click the Browse button in the Attachments section.

Result: The Open window appears.</td></tr>
<tr><td>49</td><td>Navigate to the appropriate file on your computer.</td></tr>
<tr><td>50</td><td>Click the title of the file.</td></tr>
<tr><td>51</td><td>Click the Open button.

Result: The filename appears in the Select File: field.</td></tr>
<tr><td>52</td><td>Click the Attach File button.

Result: The file now appears in the Attachments table.</td></tr>
<tr><td>53</td><td>Repeat steps 48–52 for each attachment.</td></tr>
<tr><th>Step</th><th>Action</th></tr>
</table>

<table>
<tr><td>54</td><td>Click Next Step.</td></tr>
<tr><td>55</td><td>Review all the information in the Overview section for accuracy.
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>Everything is accurate</td><td>Click SUBMIT</td></tr>
<tr><td>Changes are needed</td><td>Click Edit
Return to the appropriate section
Make the edits
Click SUBMIT</td></tr>
</table>
Result: The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.
Warning: Being able to submit the form does not mean the action is error free. A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. If an error exists, the form will crash and HR Information Systems will receive an automatic notification (ticket). No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first. </td></tr>
</table>