Adding a New Employee (New Hire)

Overview: This job aid will guide Employee Administrators in adding a new employee to UltiPro.

New Hire On-Boarding Steps

1. The Employee Administrator submits employee details in UltiPro using the procedures outlined in this job aid.
2. UltiPro triggers an approval request to the new employee's manager and to the Divisional Director of Employee Relations (DDER) for DHQ or the HR Operations Manager for THQ.
3. When the submission is approved, the IT department is notified electronically of a new employee in the system and a ticket is created in *Service Now*.
4. IT creates an email address and password for the new employee and the account details are sent to the employee's manager via the ticket, which is then transferred to the UltiPro team to finalize the UltiPro account.
5. The UltiPro team updates the employee record with the newly issued email address and closes the ticket.

Advise the Manager:

- It may take several days after the approval for the new email address and password to be created.
- If, after 2-3 days, the email address and password have not been received, send an email to the Service Desk requesting that it be provided. Be sure that the request includes employee name, employee number, ministry unit and supervisor name.

Advise the Employee:

- UltiPro can only be accessed through MyArmy with a Salvation Army email address (personal email addresses are not permitted).
- Contact the Service Desk if there are any issues accessing MyArmy or UltiPro.

Before Beginning:

To properly complete the on-boarding process in UltiPro, ensure all required documents are on hand. This includes:

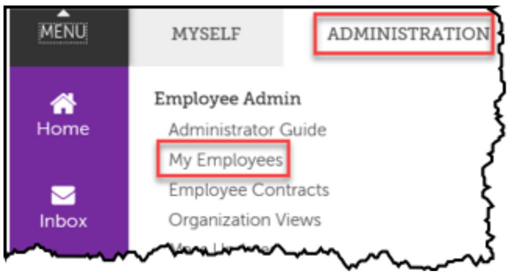
- Employee personnel file with offer letter;
- Valid Social Insurance Number (SIN) (photocopy proof required);
- Void cheque;
- Completed Federal and Provincial TD1 (completed by employee).

For further information refer to the *Employee Relations Procedure Manual*, Section 21: *Employee Personnel File – Contents.*

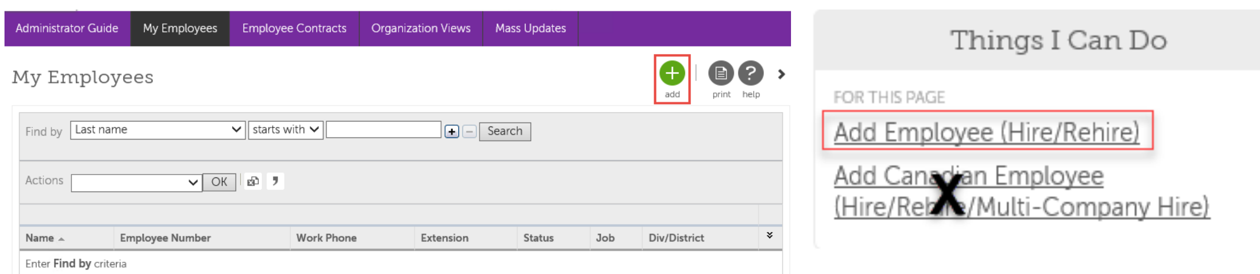
> ***Tip! Data entered can only be saved once, so before beginning ensure you have plenty of time to complete the process in full. The system will time out after an hour of inactivity and lost data cannot be retrieved.***

Add New Employee

1. Click **Menu** then select **My Employees** from the **Administration** tab.

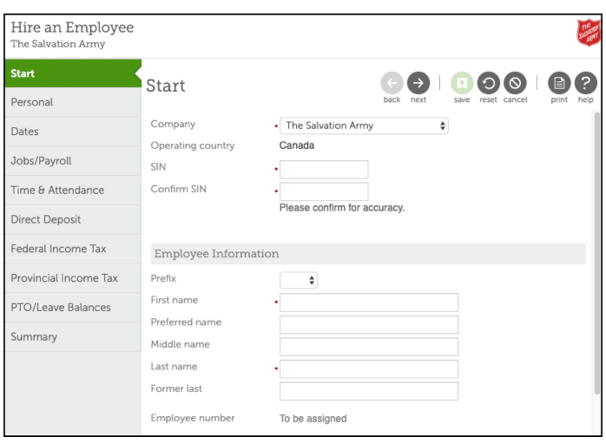


2. In the **My Employees** screen, add an employee by clicking the green **Add** button at the top right or by clicking the **Add Employee (Hire/Rehire)** button in the *Things I Can Do* box.

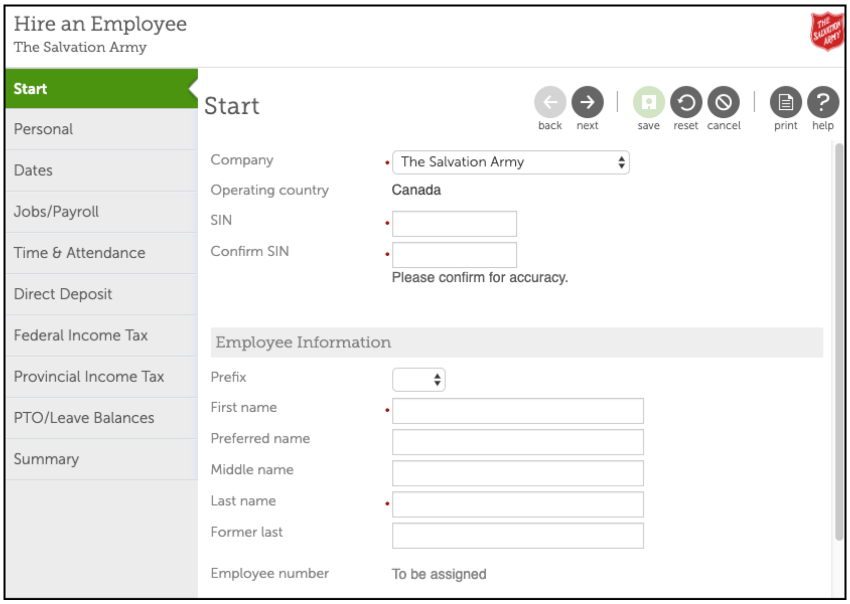


Tip! The Add Canadian Employee button is only used for rehiring Pensioners.

The **Hire an Employee** window contains a number of ribbons to the left, indicating the different sections of the form. As each step is completed, the system will highlight the current ribbon in green. Mandatory fields are indicated by a red asterisk.

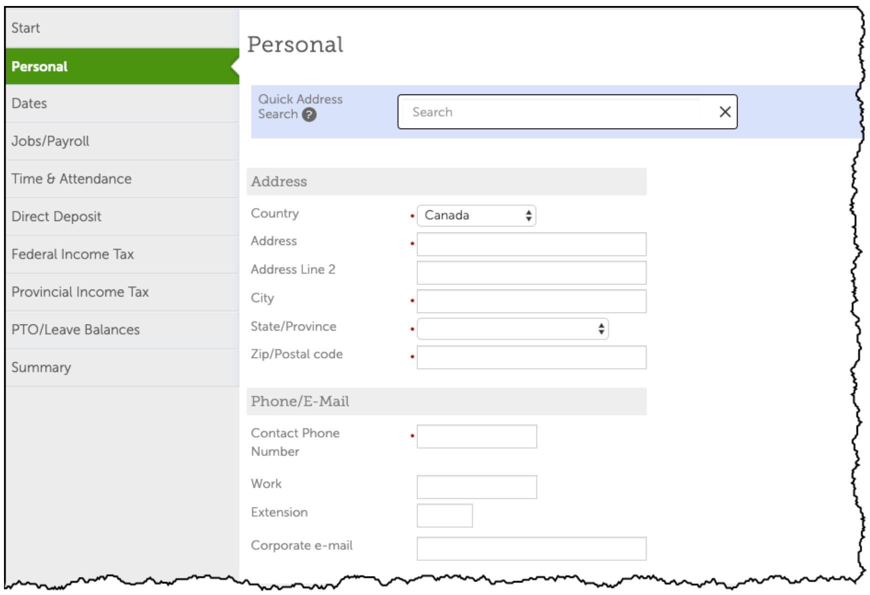


3. **Start** Ribbon
    a. Select **The Salvation Army** from the **Company** drop-down list box.
    b. In the **SIN** and **Confirm SIN** boxes, type in a valid social insurance number.
    c. Under the **Employee Information** heading, enter name details then click **Next**.

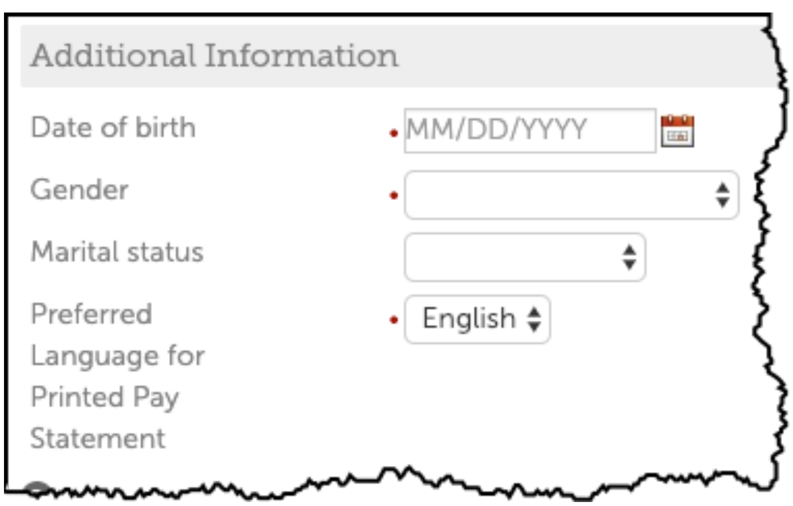


Tip! SIN numbers beginning with '9' indicate a work permit and an expiry date field will automatically display. Enter the expiry date noted on the SIN or associated government document. Individuals who have this type of SIN cannot be hired in a permanent role.

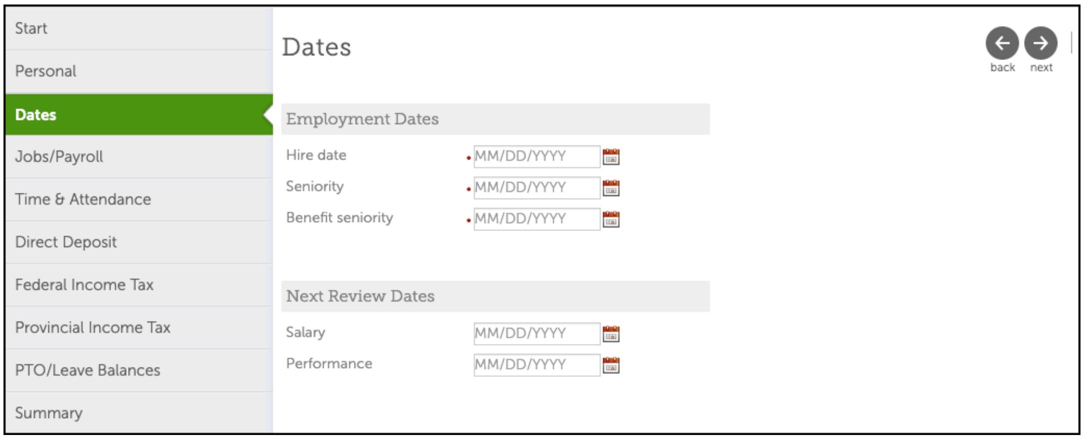
4. **Personal** Ribbon
   a. Complete the required fields under the **Address** and **Phone/Email** headings. Ensure the **Corporate email** box is left blank; this will be completed by the UltiPro team once the email address has been assigned by IT.



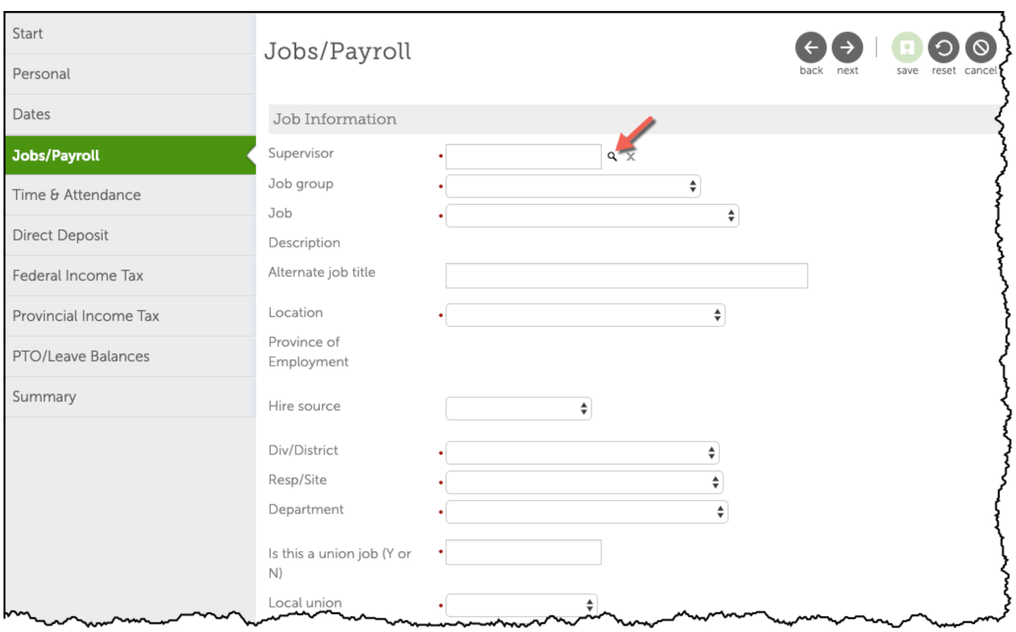
   b. Complete the required fields under the **Additional Information** heading using the available selections in each drop-down list box, then click **Next**.



5. **Dates** Ribbon
   a. Using the calendar icon, select the **Hire Date**. The **Seniority**, **Benefits seniority** and **Next Review Dates** fields will automatically populate.
   b. Click **Next**.



6. **Jobs/Payroll** Ribbon
   a. Use the magnifying glass icon to the right of the **Supervisor** box to locate the name of the individual who will be the new employee's manager and click the name to select it. The manager is the individual who will authorize the new employee entry. Ensure the manager chosen is <u>active</u> in the UltiPro system.



   b. Complete all fields in the **Job Information** heading by selecting the appropriate choices from the drop-down list boxes, noting the following:

- In the **Job Group** box, select **JG000-TSA Jobs** for a non-union job or the appropriate ministry unit specific choice for a union job.
- In the **Job** box, select an appropriate job from the drop-down menu list.

Example: selecting a non-union job:

- The **Alternate Job Title** box, while not a mandatory field, displays on the employee's pay statement, therefore it is recommended to enter the employee's specific job title in this box.
- If the job is not unionized, type **N** in the **Is this a union job** box, then in the **Local union** box, select **Non-Union** from the drop-down list box.

c. Complete all fields in the **Payroll** heading by selecting the appropriate choices from the drop-down list boxes and click **Next** once complete. Note the following:

- ***Pay rate** is based on an hourly, weekly or yearly selection.
- The **Pay group** selection is based on division or region.
- **Scheduled hours** is based on a two-week time frame. For casual, type in 16.
- **Earnings Group** is ministry unit specific. Use the Earnings Group *Hourly TE* for kettle or part-time employees.
- If employee is full time or part time and salaried, place a check mark in the **Pay Automatically** box.

See next page to learn more about Pay Rate entry.

About UltiPro Pay Bands and Hourly Rate Entry

Salary Range Values that make up each Pay Band in UltiPro are determined based on the assumption that the scheduled work week is 40 hours. To ensure that the correct salary range values are calculated, input the hourly rate for the job. If an annual salary is entered and the bi-weekly hours are less than 80, then the Annual Salary Range Value (Min/Mid/Max) will result in a system warning. ***Always enter the hourly rate for the position using the method below:***

Annual Salary *divided by* **Bi-Weekly Scheduled Hours** divided by **26** (total pay periods per year)

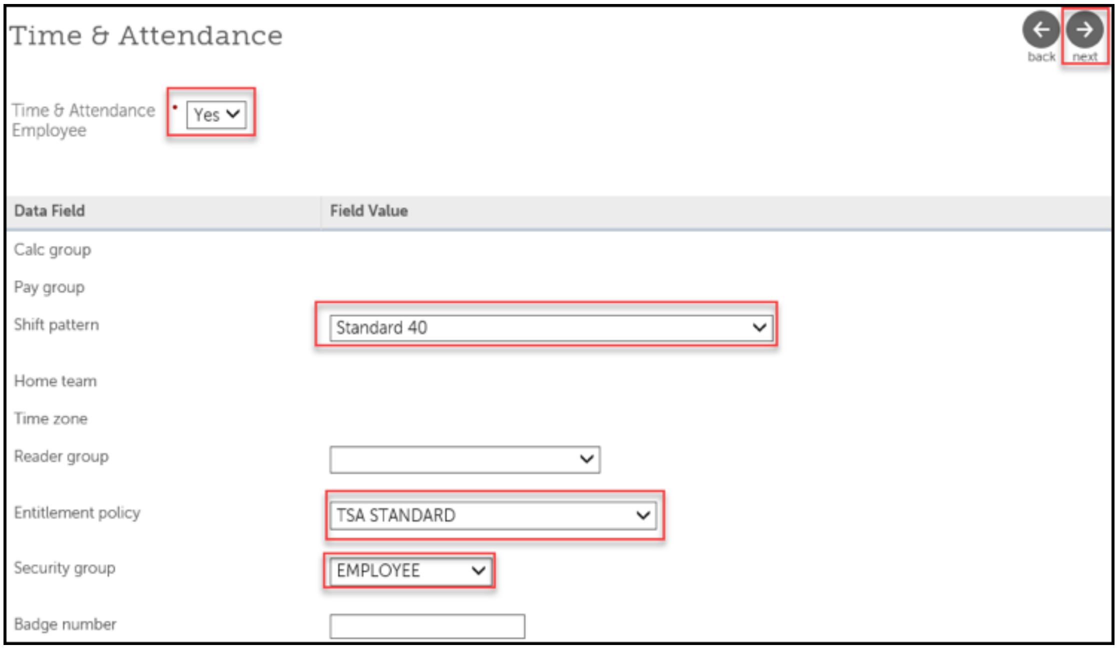
Example #1: Salaried Position of $45,500 annually with 80-hour work week:

45,500 divided by 80 = 568.75 divided by 26 = $21.87 hourly

Example #2: Salaried Position of $45,500 annually with 70-hour work week:

45,500 divided by 70 = 650 divided by 26 = $25.00 hourly

7. **Time & Attendance** Ribbon



a. Select Yes in the **Time & Attendance Employee** drop-down list box.

b. In the **Shift pattern** drop-down list box, select an appropriate shift pattern for full time or part time regular employees. This populates the time sheet in Time & Attendance with a weekly schedule of shifts. Shift patterns are listed by ministry unit, beginning with the first four digits of the ministry unit number.

c. If the employee will use a time clock, select one from the **Reader Group** drop-down list box. If a specific location's clock is not listed, select **All Clocks** from the list.

d. Select an **Entitlement Policy** from the drop-down list box. Entitlement is the vacation, sick and other plans granted to the employee. For non-union staff, select TSA plans; for union staff, refer to their collective agreement.

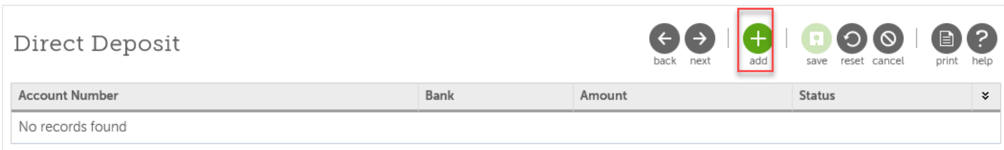
e. Select a **Security** group. Most employees will fall into the basic **Employee** group. If the employee will be a Timekeeper, then **Timekeeper** may be selected. If the employee will be managing or supervising staff, the **Supervisor** option may be selected. This can also be updated at a later time.

d. The **Badge number** field is related to clock configuration and should be completed after the UltiPro new hire process has been completed and approved (refer to ***Final Steps*** (step 3) on Page 11 of this document).

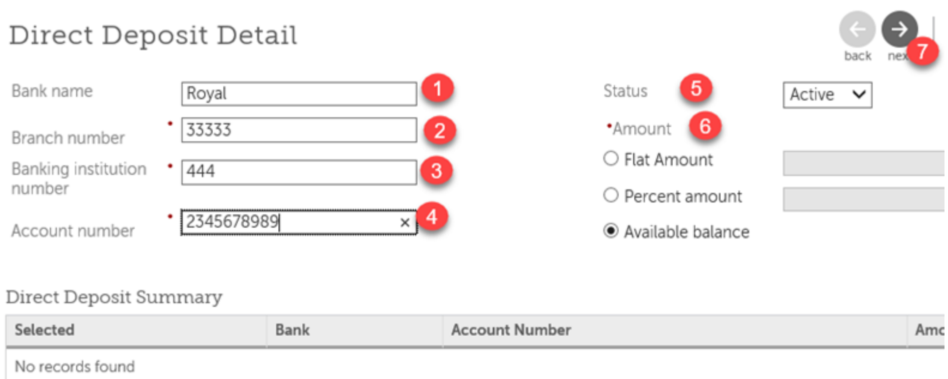
8. **Direct Deposit** Ribbon

Use the employee-provided void cheque or bank authorization form to complete this section.

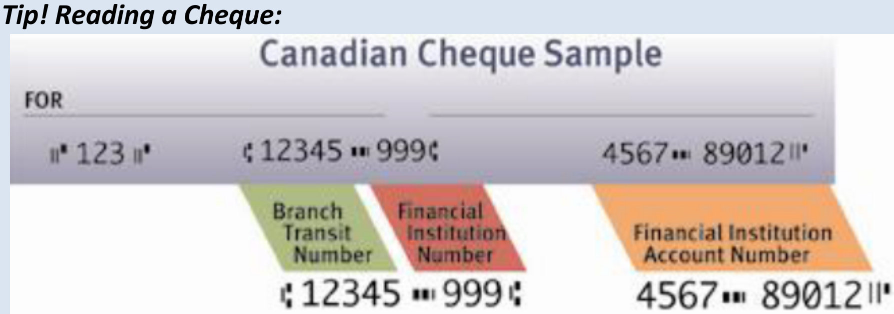
a. Click the green Add button to begin.



b. Enter all required details under the Direct Deposit Detail heading (steps 1 to 4, below) ensuring **Status** is **Active** (step 5) and **Available balance** (step 6) is selected. Click **Next** (step 7).

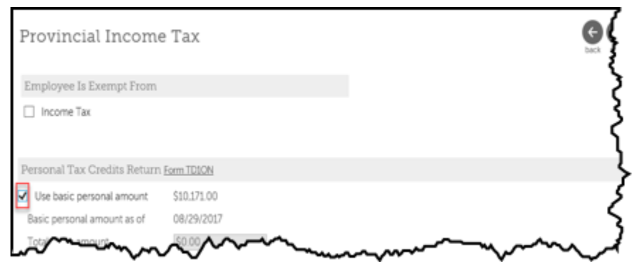


Tip! Reading a Cheque:



9. **Federal and Provincial Income Tax** Ribbons

   a. By default, both the **Federal Income Tax** and **Provincial Income Tax** screens have the basic personal amount selected. To make a change, remove the check box from the **Use basic personal amount** selection and edit the screen(s) accordingly. Click **Next**.



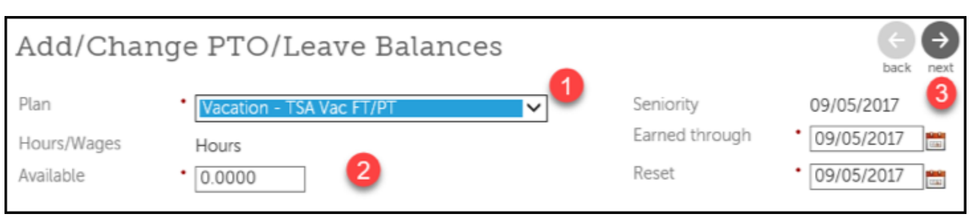
Tip! Income tax form edits can be made after the employee has been set up in UltiPro.

10. **PTO Leave/Balances** Ribbon

   a. In the **PTO/Leave Balances** window, click Add to begin adding a plan.

   b. Use the **Plan** drop-down list box to select an appropriate plan (step 1) and then type in the starting balance (step 2). Continue populating the remaining fields (step 3):

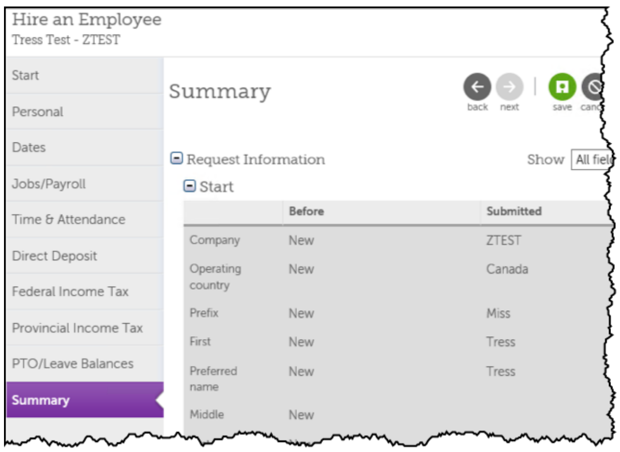
      i. The **Seniority** field will be pre-populated with the employee's hire date.
      ii. **Earned through** date for a new employee is their hire date.
      iii. **Reset date** is the PTO plan reset date. For new employees with Vacation % payout plans, the reset date is the date of hire. For all other PTO plans, the reset date is the first day of the current PTO year.



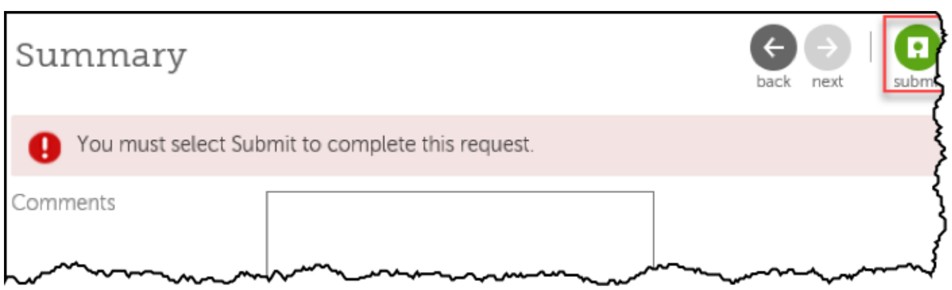
   c. Click **Next** to save the plan then click **Add** to add another plan or **Next** to continue.

11. **Summary** Ribbon

a. This screen represents a summary of all details previously entered on each ribbon. Scroll down to view all entries completed. If changes are needed, click the **back** button at top right of the screen to move back through each previous screen to make edits on the desired ribbon. ***Ensure all details are correct before moving to the next step***. If all entries are correct, click **Save**.



b. A second **Summary** screen appears. Click **Submit**. At this point, content may no longer be edited.



c. The details are automatically forwarded to the manager for authorization.
d. Scan the documents (offer letter, bank details and TD1) and email them to the approver to aid them in reviewing and approving the employee entry.
e. Once approved, a message will appear in the originator's (Employee Administrator's) UltiPro Inbox.
f. If the submission is denied, identify the errors and repeat the **Add Employee** procedure. If the submission is approved, proceed with next steps, below.

Final Steps

1. The approval status will show in the ***Completed*** display of the Employee Administrator's UltiPro Inbox and the employee will also be added to the **My Employees** list under **Menu > Administration** tab.
2. To upload supporting documents, locate the employee record in **Menu > Administration > My Employees** and click the **Documents** tab. Add digital copies of the hiring letter, void cheque and TD1s.
3. **Badge number:** if the ministry unit uses a clock, now is the time to add the employee's 7-digit number to the **Badge number** field in the Time & Attendance tab of the employee record. If the employee has been issued a physical card for clocking in, enter the badge number located on the card and include any leading zeroes.