General Instructions for Quick Hire Form

OVERVIEW

The Harvard University PeopleSoft online Quick Hire form is used to create a request for an initial appointment of annual faculty (instructors, lecturers, visiting and holding appointments) and of clinical fellows and research fellows. The request is reviewed by HR and/or OFA, and once approved, the appointment is formally registered in the Harvard University PeopleSoft system, generating the record in the HMS systems and a unique HUID number.

The faculty appointments that currently can be processed using a QuickHire form are:

- Instructor Appointments
- Lecturer Appointments
- Visiting Appointments
- Member of the Faculty (Holding) Appointments

The non-faculty appointments that currently can be processed using a QuickHire form are:

- Fellow Appointments
- Research Associate and other non-faculty Staff Associate Appointments

Form Preparers and/or Department Approvers in HMS faculty appointing departments typically initiate this process. These roles require access to the HMS PeopleSoft system and HMS shared folder servers. Application for access is available as an appendix to this guide, on the HMS Website >Human Resources>PeopleSoft On-Line Forms, or by contacting jennifer_ryan@hms.harvard.edu.

The process flow for hiring faculty and fellows in your department into the HMS PeopleSoft system is designed to either allow for a Preparer in your department to submit the form into the system for direct review and approval by HR or OFA, or to allow for a preliminary review by a Department Approver, who in turn submits the form into the system.

BASIC DEFINITIONS

Preparer: staff in the departments who enter QH forms into PeopleSoft in preparation for final approval by a Department Approver.

Preparers can:

- prepare a form on-line
- save a form as a draft
- submit a form for approval by Department Approver

Department Approver: staff in the departments who approve (or prepare and self-approve) QH forms prepared in PeopleSoft.

Dept Approvers can:

- prepare a form on-line
- review a form on-line
- save a form as a draft
- push back (return) the form to another preparer
- delete the form if needed
- submit a form to OFA or HR
By default, department staff entering forms are assigned a Department Approver role. In most departments, the preparer and approval role will one and the same. Larger appointing departments may opt to have Preparers in the department’s divisions prepare the forms and have a Department Approver review and approve those before submitting to OFA or HR.

**Submitter:** HMS staff in OFA or HR who submit to the PeopleSoft database after content review. Submitters can:
- review the form on-line
- push back (return) the form to a preparer or a department approver
- delete the form if needed
- submit the transaction to the PeopleSoft database

**Supporting Documentation:**
Prior to entering a QuickHire form, the Preparer should collect all the data and documentation necessary to support the appointment. Please refer to the checklists on the OFA website and the HR website for the exact list of documents required for each type of appointment.

Supporting documentation must be submitted electronically to HMS.

When submitting to OFA (instructors, lecturers and other annual faculty appointments) supporting documentation for each individual appointment is sent as one pdf and as an email attachment to: facappt@hms.harvard.edu.

*Important! Please email all supporting documents (as one pdf) before you submit a QuickHire action to OFA online.*

When submitting documentation to HR (clinical fellows, research fellows, and staff associates), please upload to the shared collaborative folder for your Department on eCommons (access to shared folders described in a section below).

*Important! For Quad paid appointees, the I9 form must be uploaded before you submit a QuickHire action to HR online.*

**QUICKHIRE PROCESS FLOW**

Once your documentation has been submitted, you may proceed to preparing a QuickHire form. The QuickHire form process flow is the following:

A **Preparer** in the department or a **Department Approver** enters the QuickHire data into an HMS PeopleSoft QuickHire form. A department **Preparer** clicks **Submit for Approval** thereby submitting the form to an internal **Department Approver** who will submit to HMS after review, whereas a **Department Approver** might enter the data and directly submit the form to HMS. The Department Approver always submits the form to HMS.
A daily email is sent to the HMS transactions staff indicating that forms are ready and awaiting their review & submission. Note that no action will be taken if the supporting documentation is not available to the appropriate HMS team.

Submitters at HMS pull up the QuickHire form, match it to the documentation submitted electronically, and review the form. Once approved, the QuickHire form is submitted to HMS PeopleSoft.

An email is sent back to the initial preparer of the form (either a Preparer or a Department Approver) after the QH form has been submitted to PeopleSoft; the email notification includes the new HUID that has been assigned to the appointee.

PREPARING A QUICKHIRE FORM

Collecting the necessary information
Before entering a QuickHire form, you should have the following required field information available:

- Appointee’s Social Security Number (required). This is labeled National ID. If the appointee does not yet have a SSN# (e.g., a non-resident alien) please use 999-99-9999.
- Date of Birth (required)
- First and Last Name of appointee

You should also know the following information:
- Full name of the new appointee, including middle name
- Gender
- Ethnicity/Race
- Email address (required for the Harvard University onboarding process)
- Phone number
- Effective data (aka start date)
- Your HMS Department number
- Job code for the appointment/title
- Primary job location
- Full-time or Part-time
- End date
- Local office mailing location
- Country of degree(s)
- Degrees (include all degrees)
- School(s) where degree(s) attained
- Year(s) of degree(s) (MM/YYYY)

Useful note: Although we highly recommend that you have all your data and documentation ready before you start the QuickHire process, the system allows you to save your form as a DRAFT after completing all sections through the Job Information section. This allows you to complete basic information about the appointment and return to the form later to complete or update information.

Accessing the HMS PeopleSoft system
(see appendix for access application information)

Initial User Access and Set-up
Once your request for access to the HMS systems has been processed, you will receive instructions on creating a Harvard PIN. Using your Harvard PIN, sign on to HMS PeopleSoft.
The first time you access these screens, you should configure your favorites for future easy access. To do this, follow the next four steps:

**Step 1**
Select Workforce Administrator from the Self Service drop down. This will open a tile menu based on your security access.

**Step 2**
From the Workforce Administrator tile menu, select the Harvard Processes tile.

**Step 3**
Then select Hire Monthly – Approve or Hire Monthly – Preparer from Entry/Forms. This will open a QuickHire form.

**Recommended Step 4**
Bookmark Harvard Processes form as a Favorite from the Favorites drop down accessible from the hamburger icon.

Click OK.

The next time you access HMS PeopleSoft, click on Favorites to access Harvard Processes more rapidly.
Returning User Access

Using your Harvard PIN, sign into HMS PeopleSoft.

Assuming you have set up your Favorites as described above, select **Hire Monthly-Approve** or **Hire Monthly-Preparer** (or your customized name such as QuickHire). Otherwise, follow the steps above to access Harvard Processes > Hire Monthly – Approve or Hire Monthly -- Preparer.

**CREATING A NEW QUICKHIRE RECORD**

Create your new record:

**Step 1**

Click on the **Add a New Value** tab (aka 'add a new person')

**Step 2**

Enter the SSN # into the National ID field. All Quick Hires are entered with SSN # as the first identifier.

If the appointee does not have US SSN #, you may use 999-99-9999.

Click on **Add** to open the QuickHire Form.

**Entering Data**

The QuickHire form is organized into 10 sections, numbered A-J below. See the boxes on the left for step-by-step instructions on how to complete the form.
A. Form Status and Comments

**Personal Information Complete** and **Job Information Complete** will autocheck as you complete these sections of the Quick Hire.

The save draft function is only available once both of these are checked.

**Eligible to Work in U.S.** is only applicable to Harvard paid employees.

**Comments:** Use this box to communicate with HMS. For example, you might notify HMS regarding uploaded documentation or request that a school be added to the school list.

B. Personal Information

When the system finds a match in the Harvard-wide PeopleSoft system based on **Name**, **National ID**, and/or **Date of Birth**, your Quick Hire Form will prepopulate with Personal Information data. If information prepopulates, **STOP HERE** and email the HUID that appears to your OFA or HR Transactions Coordinator. HMS will review the existing data and determine if another active or inactive appointment exists. If you create a second HUID record for an existing individual, the duplicate ID remains for the life of the individual's HMS appointments.

If no active appointment exists, you will be instructed to continue completing the form.

**Name:** Please include a middle name if available.

**National ID:** Defaults from the SSN number used to create the form, or from a match with other data you typed in the first, look-up stages. ***If the SSN is incorrect, exit the form and start over.***

**Date of Birth** and **Gender** are required fields.

**Military Status and Mail Distribution:** Leave as is.

**Home Address:** Use only local addresses. If the person does not yet have a local address, use c/o the hospital address.

Type in the **Postal (zip)** code and the correct City name and State will auto-populate.
Ethnic Group is a two-part question. If “No” for Hispanic/Latino, then you must also select one or more racial categories.

C. Email and Telephone

Always include an email, required for onboarding and always select HMS email for a work email even if it is an affiliate or other non-Harvard work email. HMS email indicates this appointment is affiliated with HMS and not another Harvard school.

If using a personal email to bridge until affiliate email is generated, select Secondary.

All phone numbers are entered here. Choose the Phone Type from the drop down.

Use the + to enter multiple types, for example, both Office and Home numbers.

D. Job Information

Complete the highlighted fields below.

Effective Date: Cannot be more than 3 months in the future.

Department: Enter your Department code.

Job Location will automatically pre-populate based on your Department. Change it only if appointee will be at a different major HMS affiliate, such as DFCI, CHALLIANCE, or the VA. Refer to the job Location list for valid values.

University Mailing Address in the next section will also pre-populate.

Leave Posting Req blank.

For Quad-based appointments, the Supervisor ID is the PI’s HUID #. Otherwise, leave blank.

See next page for Build Title details
Job Code: Refer to the Job Code chart.

Standard Hours: Always change to .01 if NPD (non-Harvard paid).

Full/Part Time: Defaults to Full-time. Do not forget to change it for Part-time appointments.

Pay Group Defaults to Non-Paid. If on Harvard payroll, click Paid button.

Useful Tips: Looking glass fields are tied to searchable tables. PeopleSoft allows you to perform searches using the contains function.

Build Title Screen

The Build Title Screen is accessed from the Job Information section, by selecting Build Title in the screen above.

Enter 1 under Job Hierarchy and click on Build Title, which will generate a Business Title. This is an important step towards ensuring a proper title reflects for the appointee in all rosters and directories across Harvard systems.

This is also your opportunity to assign a Division to the individual. This field is not used by HMS, and has been added as a tool for our affiliates. This information will appear on future reports such as RAAP and other Employee Lists.

Business Title: Click Build Title. PeopleSoft will create the title from the job code and the department name.

Division: If your department is set up to record Divisions, select the appropriate division from the look up.

Job Hierarchy: Confirm the Job Hierarchy code reads “1”.

Click OK.

When done, click OK to return to the main body of the form.

Job Information -- Harvard paid appointees (For Harvard-paid appointees ONLY)
The Comp Rate Code is always NAANNL for Harvard paid faculty and post docs. You may type it in or choose it from the look up table.

FTE Salary is the Full-time equivalent salary. Do not prorate salary (or stipend). PeopleSoft generate this based on the standard hours.

E. University Mailing Address

Location will default from the Department Location entered in the Job Information section. Just add the Floor or Lab under Address 2.

To change the location code to another location (ex: DFCI or MGH Charlestown) choose a code from the look up.

If the location is not on the location look up, use OUTSIDE as a code and enter the full address of a LOCAL (not personal) Harvard affiliated mailing address.

F. Costing Data –applicable ONLY to Harvard Paid appointees

Earn Code: Leave blank (defaults to Reg). Enter the Chart of Accounts costing string the salary or stipend is to be charged to. Additional lines of costing may be added by clicking the +.

% Distribution: Type 100 if there is one row of costing per earnings code. For earn codes with multiple rows, complete this field so that all rows add up to 100%.
G. Additional Pay (do not use - for HR office only)

H. Citizenship Data (do not use - for HR office only)

CAUTION! Do NOT click the Non Resident button.
You will not be able to close it again, and will not be able to submit your form.

I. Education Data

Education Data is REQUIRED, not optional, for HMS faculty and fellow appointments.

Country: All Schools are organized and searchable by country. The default is USA. To look up a school code, choose the country first.

Degree: type in the initials of the degree (no punctuation) or use the look up function.

Date Acquired: If actual day is unknown, use 01 as DD. EX: 05/01/1986.
If actual month is unknown, se 06/01/ as MM/DD. EX: 06/01/1992

To enter additional degrees, use the + sign.

Note: The lookup function may be necessary when selecting a country, as some codes are less intuitive than others. For example, Spain is ESP, Cambodia KHM, and Switzerland CHE.

J. Save Draft or Submit for Approval
The Save as Draft, Submit for Approval and Approve (for use by Department Administrators only) buttons are only available once Personal and Job Information are sections show as complete on the QuickHire header section as shown below. Eligible to Work in US is not required to proceed. Please ignore this status field.

Once your PeopleSoft form has been approved and submitted by HMS, the original preparer will receive a notification from psoft@harvard.edu affirming the submission into PeopleSoft. This notification will include the HUID number generated for the appointee.

COLLABORATIVE FOLDERS

There are two HMS collaborative folders available to your department. One is designed to house documents needed for appointments managed by HR and the other one for large volume projects managed by OFA.

- HMS HR Docs for [Department Name]
  Typically used for HR staff and fellow QuickHire transactions.
  - Harvard payroll forms, I9 form with supporting documents
  - CV

- HMS OFA Docs for [Department Name]
  Not typically used for faculty QuickHire transactions.
  Used for large volume projects such as term reappointments.

Note: Speak to your transactions coordinator in OFA or HR on how to access the shared eCommons folders.
APPENDIX

PeopleSoft Access Request Form

Office of Human Resources and Office for Faculty Affairs
Harvard PeopleSoft — Preparer Access Request Form

<table>
<thead>
<tr>
<th>Request Harvard ID and Preparer Access:</th>
</tr>
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<tbody>
<tr>
<td>Last Name</td>
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<tr>
<td>Email address</td>
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</table>

Do you have an eCommons ID/MARS logon? If yes, eCommons ID:

Do you have, or have you ever had, a Harvard ID? Yes No If Yes, HUID # if known:

Complete this section if you do not have a Harvard ID number

Date of Birth (mm/dd/yyyy) / / Gender: Male Female

Last 4 digits of Social Security number:

Your academic appointing department (choose from drop down):

<table>
<thead>
<tr>
<th>Supervisor Name</th>
<th>Supervisor email</th>
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For what types of appointments are you responsible? (check all that apply).

| Clinical/Research Fellows | Instructors/Lecturers | Other |

Reminder: as a Harvard employee and/or MARS user, you have acknowledged Harvard University’s confidentiality agreement and are subject to Harvard’s policies regarding use and care of confidential information. [http://policy.security.harvard.edu](http://policy.security.harvard.edu)

Preparer and Department Head Statement:

We agree to accept responsibility for all HMS/HSDM appointment transactions initiated by the Preparer in Harvard's PeopleSoft system. We also acknowledge that these access privileges are subject to periodic recertification.

<table>
<thead>
<tr>
<th>Preparer Name</th>
<th>Signature</th>
<th>Date</th>
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<tbody>
<tr>
<td>Supervisor Name</td>
<td>Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Department Head Name</td>
<td>Signature</td>
<td>Date</td>
</tr>
</tbody>
</table>

Return the signed form saved as a pdf scan via email to: jennifer_ryan@hms.harvard.edu.

You are required to cc: the appointing department head on this email.

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