



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 be 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.

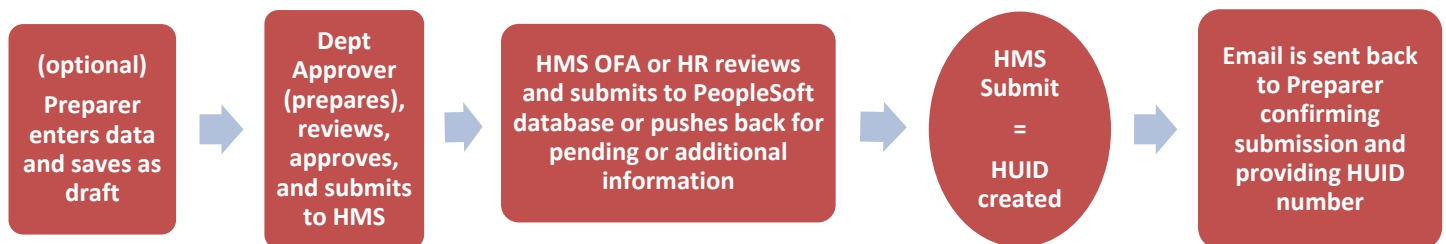
Important! Please email all supporting documents (as one pdf) before you submit a QuickHire action to OFA online.

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.



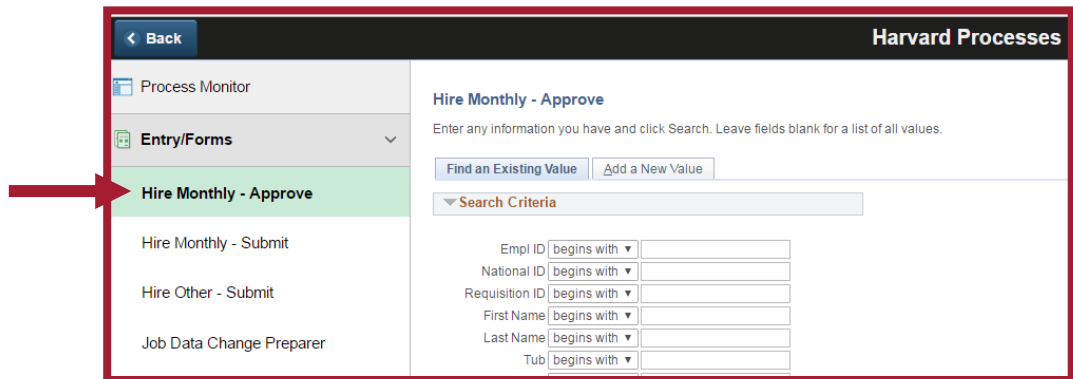
Step 2

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



Step 3

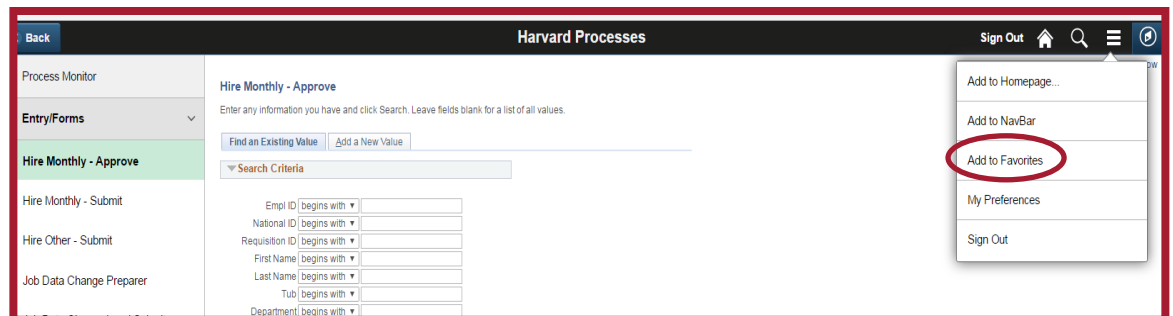
Then select **Hire Monthly – Approve** or **Hire Monthly – Preparer** from Entry/Forms. This will open a QuickHire form.



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')

Hire Monthly - Approve
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Empl ID begins with ▼

National ID begins with ▼

Requisition ID begins with ▼

First Name begins with ▼

Last Name begins with ▼

Tub begins with ▼

Department begins with ▼

Prepared By begins with ▼

Tub Payroll Rep ID begins with ▼

HR Rep ID begins with ▼

OFA Rep ID begins with ▼

Form Status = ▼

Effective Date = ▼

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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.

Harvard Processes

Hire Monthly - Approve

[Find an Existing Value](#) [Add a New Value](#)

Empl ID

National ID

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

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.

Updated on April 2017

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.

The screenshot shows the 'Quick Hire' form for a 'Harvard Monthly Paid / Non-Paid Employee'. The form has a 'Draft' status. A 'Comments' box contains the text: 'Hi - I cannot find this school on the school table: XYZ University, Tehran, Iran, MD 2009' and 'CV and letter uploaded for instructor appt as: Harvard, John cv'. The 'Personal Information' section is highlighted in red.

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.

The screenshot shows the 'Personal Information' section of the form. It includes fields for Prefix, Suffix, First Name, Middle Name, Last Name, National ID (999999999), Date of Birth, Gender, Military Status (Not indicated), and Mail Distribution (Home Address, University Mailing Address). The 'Home Address' section includes Country (USA), Address 1, Address 2, Address 3, City, State, and Postal. The 'Ethnic Group' section includes a question 'Is the person Hispanic/Latino?' (Yes/No) and a list of racial categories: American Indian/Alaska Native, Black or African American, White, Asian, and Native Hawaiian/Pacific Islander.

Updated on April 2017

Managed by the Office for Faculty Affairs

Harvard Medical School | Gordon Hall, Suite 206 | 25 Shattuck Street, Boston, Massachusetts 02115

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.

Leave **Posting Req** blank.

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

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.

See next page for **Build Title** details

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

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.

Look Up Department

Set ID: HRVRD

Department: contains Medicine

Description: begins with

Company: begins with

Location Set ID: begins with

Location Code: begins with

Manager ID: begins with

Budget with Department: begins with

Dept Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100

Department Description	Company	Location	Location Manager	Dept Description
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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**.

Named Title: []

Rank: []

Discipline CD: []

Department of: [] Academic Criteria: []

Field of Endeavor: []

Division: []

Tenure Guarantor: [] **Build Title**

Business Title: []

Job Hierarchy: **1** **Confirm this reads '1'**

Non-Academic Title: []

Rank Level: []

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)

Additional Pay - Optional						
Effective Date	Earn Amount	Goal Amount	End Date			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Earn Code Tub	Org	Object Code	Fund	Activity	Sub-Activity	Root
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Citizenship Data	
<input checked="" type="radio"/> US Citizen/Permanent Resident/Non Res Alien Working Abroad	<input type="radio"/> Non Resident Alien

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.

Education Data - Optional				Find	First	1 of 1	Last
Country:	<input type="text" value="USA"/>	Degree:	<input type="text"/>	<input type="checkbox"/>	Graduated	<input type="button" value="+"/>	<input type="button" value="-"/>
School Code:	<input type="text"/>	School:	<input type="text"/>	Date Acquired:	<input type="text"/>	<input type="button" value="B"/>	

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

Approver Name	Approve Date
Approver Signature	<input type="text"/>
<input type="button" value="Save Draft"/>	<input type="button" value="Submit for Approval"/>
<input type="button" value="Approve"/>	<input type="button" value="Submit to Database"/>
<input type="button" value="Push Back"/>	<input type="button" value="Delete"/>
<input type="button" value="Print Form"/>	

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.

The screenshot shows a web form titled "Quick Hire" for "Harvard Monthly Paid / Non-Paid Employee". On the left, there are three checkboxes: "Personal Information Complete?" (checked), "Job Information Complete?" (checked), and "Eligible to Work in U.S." (unchecked). Below these are labels for "Payroll Status:", "Form Status: Draft", and "Requisition ID:". On the right, there is a "Comments:" label above a large empty text area.

Once your PeopleSoft form has been approved and submitted by HMS, the original preparer will receive a notification from pssoft@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



Request Harvard ID and Preparer Access:		
Last Name	First Name	Middle Name
Email address		
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):		
Supervisor Name	Supervisor email	
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>)

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.		
Preparer Name	Signature	Date
Supervisor Name	Signature	Date
Department Head Name	Signature	Date

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.

Version 1.1 – 4/15/15

Updated on April 2017