Entering Employee Records Lesson

Step	Action
1.	Click the **State of Nebraska** link. State of Nebraska
2.	Click the **Human Resources** link. Human Resources
3.	Click the **Employee Maintenance** link. Employee Maintenance
4.	Click the **Employee Information** link. Employee Information
5.	If the Employee is part of your agency and is transferring to a new position within your agency, the system does not let you enter duplicate Tax IDs (Social Security Numbers). If the Employee is NOT part of your agency, you will be able to create a duplicate record. It is VERY important to conduct a the EMPLOYEE LOOK-UP to ensure you do not create a duplicate record. If an Address Book record exists for the employee you want to add, the system will display an error message to indicate a duplicate number when the last employee master screen is entered. To avoid this error you should first search to make sure the employee is not already entered into the system. To do this click in the **Employee No** field.
6.	Click the **Visual Assist** tool (magnifying glass).
7.	Enter the employee's social security number in the **Tax ID** field.
8.	Click the **Find** button.

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9.	"**No records found**", indicates the Social Security Number does not exist in the Address Book. If the Social Security Number does exist in the Address Book, and the search type is an "**E**" or "**X**", note the business unit for the employee and contact the appropriate agency to transfer the employee (Ex. S290000000 is Agency 29 = Natural Resources). If there are "**No records found**", or if the Social Security Number does exist, but not as an "**E**" or "**X**" search type you can proceed to the next step.
10.	Click the **Close** button.
11.	Click the **Add** button.
12.	**Security Business Unit** – Enter a Business Unit number that secures the employee's record from unauthorized access.
13.	Click in the **Home Company** field.
14.	**Home Company** – Enter "**10000**" for ALL State of Nebraska employees.
15.	Click in the **Check Route Code** field.
16.	**Check Route** – XX XXX XXX XX, for Agency (2 spaces), Division (3 spaces), Work Facility Code (3 spaces), Sequence # (2 spaces).
17.	Click in the **Pay Frequency** field.
18.	**Pay Frequency** – Enter if the employee is Bi-Weekly or Monthly.
19.	Click in the **Pay Status** field.
20.	**Pay Status** – Review Valid codes. Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run. Use the **Visual Assit** tool if you need to.
21.	Click in the **Employee Benefit Status** field.
22.	**Employee Benefit Status** - Enter the employee benefit status. Use **Visual Assist** tool if you need to.
23.	Click in the **Benefit Group** field.

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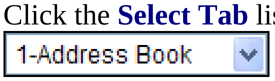
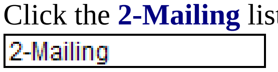
24.	**Benefit Group** – Enter the benefit group to which the employee is assigned. Use the **Visual Assist** tool if you need to.
25.	Click in the **Adj. Service Date** field.
26.	**Adjusted Service Date -** This date is used to determine the amount of leave earning the employee should be receiving. This MAY be the same date as the Original Hire Date or Agency Original Hire Date. The Adjusted Service Date is the employee's original employment date plus the number of days break in service. This can be calculated by using the Adjusted State Service Date Spreadsheet in the HR/Payroll Training Manual.
27.	**Original Hire Date** – Enter employee's Original Hire Date with the State of Nebraska excluding any time the person was employed as a temporary at the beginning of their employment with the State.
28.	**Date Pay Starts** - Enter the date the employee will begin accruing pay.
29.	Click in the **Last Start Date** field.
30.	**Last Start Date** – Enter the date the employee started with the particular agency.
31.	**Country** – This will default to US so you can leave it blank.
32.	Click the **Con't** button. 
33.	Type the employee's name in the **Alpha Name** field. Type the name as Lastname, Firstname, Middle Initial. For example, "Clark S. Kent" would be entered as "Kent, Clark S".
34.	Click in the **Tax ID** field.
35.	Type the employee's Social Security Number in the **Tax ID** field without any spaces or dashes (ex. 123456789, not 123-45-6789).
36.	Click the **Select Tab** list. 
37.	Click the **2-Mailing** list item. 
38.	**Mailing Name** – Enter the employees first name, middle initial, last name (without the commas). For eample, "John S Doe."
39.	Click in the **Address Line 1** field.
40.	Enter the employees street address in the **Address Line 1** field.
41.	Enter the city of the employees residence in the **City** field.

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42.	Click in the **State** field.
43.	Enter the state of the employees residence in the **State** field.
44.	Click in the **Postal Code** field.
45.	Enter the zip code of the employees residence in the **Postal Code** field.
46.	Click in the **County** field.
47.	Enter the county of the employees residence in the **County** field. This is a numeric code. Use the **Visual Assist** tool if neccesary.
48.	If you use the **Visual Assist** tool click the radio button next to the correct county.
49.	Click the **Select** button.
50.	Click the **OK** button.
51.	An Address Book Number for the Employee appears as the Supplier Number.
52.	Enter "**000**" into the **Payment Terms - A/P** field. Everything else defaults in.
53.	The Supplier Master is necessary to make payments other than payroll. Expense Reimbursements are an example. The 000 indicates payment is to be made upon receipt, instead of waiting until the end of the month.
54.	Click the **Tax Information** tab. Tax Information
55.	Enter "**P**" into the **Person/Corporation** field.
56.	Click the **OK** button.
57.	You will get a "yellow" Address Book Record Search Type Warning -- you can ignore the warning. Click the **OK** button again.
58.	Complete the **Ethnic Code** field. If you do not know the ethnic code to use you can use the Visual Assist tool.
59.	Click in the **Marital Status** field.
60.	Enter the marital status of the employee (M-Married or S-Single).

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61.	Click in the **Date of Birth** field.
62.	Enter the date of birth of the employee in the **Date of Birth** field.
63.	Enter the gender of the employee in the **Gender** field. M-Male or F-Female.
64.	Enter the employee's age as of the last July 1st.
65.	Click the **Con't** button.
66.	Click in the **Document Type** field.
67.	Enter the Document type in the **Document Type** field. Use the Visual Assist tool if needed.
68.	Click in the **Document Number** field.
69.	Enter the document number into the **Document Number** field.
70.	Click in the **Document Expiration Date** field.
71.	Enter the expiration date of the document into the **Document Expiration Date** field.
72.	Click the **OK** button.
73.	Enter the address book number of the employee's supervisor in the **Supervisor** field.
74.	Click in the **Home Business Unit** field.
75.	**Home Business Unit** – Enter the Business Unit to which employee is assigned.
76.	**Position ID** – The Position ID the employee is occupying.
77.	Click in the **Job Code** field.
78.	Enter the Job Code in the **Job Code** field if it does not prefill. Use the Visual Assist tool if you need to.
79.	In the **Working Title** field enter the working title only if it is different from the Job Code description.
80.	In the **Employment Status** field enter the employment status of the employee. Use the Visual Assist tool if you need to.
81.	Select the Code by click the corresponding radio button. **FULL-TIM REGULAR** is the default.

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82.	**Organizational Business Unit**, **Next Review Type** and **Next Review Date** are all optional fields
83.	Click the **Con't** button.
84.	Make sure the **Only Use Defaults to Overwrite Blank Values** option is selected. If it is not click the radio button next to it.
85.	Click the **OK** button.
86.	Complete the Salary field for salaried employees. Complete the Hourly Rate field for hourly employees.
87.	Press **[Tab]**.
88.	Make sure the following fields are completed as well: **Std Hrs/Day** **Std Hrs/Year** **Pay on Std Hours** **Overtime Exempt** **FTE** – full time equivalent Use the Visual Assist tool if you need to.
89.	Click the **Form** button.
90.	Click the **User Def.Cat. 01-10** menu. User Def.Cat. 01-10
91.	Enter the agency number in the **Agency Number** field.
92.	Complete the following fields as well: **O*Net Code** - If not defaulted, enter 99 **Union Code** **Census Code** - If not defaulted, enter 999
93.	Click the **OK** button.
94.	Click the **Con't** button.
95.	A yellow warning will appear. Click the **Con't** button.
96.	Enter the initial of the employee's first name in the **First Name Initial** field.
97.	Click in the **Middle Name Initial** field.
98.	Enter the initial of the employee's middle name in the **Middle Name Initial** field.

Step	Action
99.	Click in the **Tax Area (Residence)** field.
100.	**Tax Area (Residence)** - This is required to create tax history records. If this field is blank, the employee will not receive a W-2 at the end of the year. Use the Visual Assist tool if you need to.
101.	Click in the **Residency Status** field.
102.	**Residency Status** - Enter "**R**" to ensure that any additional State Income Tax withholding will calculate correctly.
103.	**Tax Area (Work)** - required to create tax history records. If this field is blank, the employee will not receive a W-2 at the end of the year. It should default to what you put in the **Tax Area (Residence)** field.
104.	There are four Marital Status fields: **Marital Status (Federal)** **Marital Status (State)** **Marital Status (Resident)** - displays as **N/A** **Marital Status (Local)** - displays as **N/A** All of the Marital Status fields default to an "**S**." These fields all need to match and will be either "**S**" for witholding at the "**Single**" rate, or "**M**" for witholding at the "**Married**" rate.
105.	Complete the I9 Status field. Use the **Visual Assist** tool if you need to.
106.	Click in the **Disability** field.
107.	Enter "**Y**" for Yes or "**N**" for no in the **Disability** field.
108.	Click in the **Veteran** field.
109.	Enter "**Y**" for Yes or "**N**" for no in the **Veteran** field.
110.	Click in the **Disabled Veteran** field.
111.	Enter "**Y**" for Yes or "**N**" for no in the **Disabled Veteran** field.
112.	Click the **Finish** button.
113.	Verify the following fields: **Effective On** – hire date **Change Reason** – 001 – New Hire defaults.
114.	Click the **OK** button.

Step	Action
115.	**Fe Ex** – Enter the tax withholding exemptions claimed on the employee's W-4. If the employee is claiming exempt status on the W-4, enter 99. This will exclude them from having Federal taxes calculated. If the employee is also claiming exempt on State Income Tax, enter 99 in the **Fe Ex** field, 28 in the T**ax Area** field, and F in the **Tax Type** field.
116.	**Additional Withholding** – Enter additional amount to be withheld over and above the calculated withholding. If the employee does not wish for any more to be withheld then leave this field blank.
117.	**FT** – flat tax (select from the items in the table below using visual assist) **% -** A percentage that replaces the tax rate from the tax table. **A -** An amount that is added to the tax computed from the tax table. **F -** An amount that replaces the tax computed from the tax table. **X -** An additional amount added to the standard exemption amount and deducted (exempt) from the annualized gross pay to determine taxable pay. **Y -** An amount that overrides the standard exemption amount and is subtracted from the annualized gross pay prior to the tax calculations.
118.	If State withholding equals Federal then complete the **Fe Ex** field and skip to the next step, otherwise on the second line of the grid enter the following fields: **Tax Area** – 28 **Tax Type** – F **Fe Ex** – State Withholding Allowances A value must be entered in this field even if it is the same as the Federal Income Tax Withholding. Additional Withholding – if applicable **FT** – Flat tax code **N/A** – 0
119.	Click the **OK** button.
120.	Type the new employee's address book number in the **Employee No** field.
121.	Click the **Find** button.
122.	Choose the employee by clicking the **check box** next to the employee.
123.	Click the **Row** button.
124.	Click the **User Def.Date 11-2** menu. User Def.Date 11-2
125.	In the **Enrollment Effective Date** field, enter the date of the first day of the payroll that you want deductions to start for the eligibility of the employee.

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126.	Click the **OK** button.
127.	Enter the change reason code in the **Change Reason** field. Use the Visual Assist tool if you need to.
128.	Click the **OK** button.
129.	Click the **Row** button.
130.	Click the **Address Book** object. Address Book
131.	Click the **Form** button.
132.	Click the **Phones** menu. Phones
133.	Enter the area code into the **Prefix** field.
134.	Click in the **Phone Number** field.
135.	Enter the seven digit phone number into the **Phone Number** field use the format "000-0000".
136.	Click in the **Phone Type** field.
137.	Click the **Visual Assist** button.
138.	Select the type of phone number you entered by clicking the radio button next to it.
139.	Click the **Select** button.
140.	You can add additional phone numbers if needed. Simply press the **Tab** button to go to the next line.
141.	When finished entering phone numbers for the employee click the **OK** button.
142.	Click the **OK** button.
143.	Click the **Close** button. Close
144.	You have successfully completed this lesson. **End of Procedure.**