

## Entering Employee Records

### Overview

When you hire an employee, you must add an employee record to the Employee Master table. The Employee Master table contains personal, company, job, and pay information for the employee. The information in the employee record can be used to analyze and report on your employees.

When you add a new employee record to the database, you complete a series of windows. As you complete each window, the next window appears. You can use the Back icon (Not the Back button on the browser!) to return to a previous window, where you can review or change information before saving the employee's record. NIS will save the new record **only** after you complete the entire series of windows.

-  When you add a new employee record to the database, the record is immediately available for reporting and payroll processing.
-  When Requisitions go live, a valid approved Requisition number will be required to add an employee record.
-  If a new employee's address book record is created, but the Employee Master record is not completed, obtain the Employee's address book number and skip to Step #6. Enter the new employee's address book number in the Employee Number field on the Employee Information – Employee window (instead of leaving the field blank) and continue adding the rest of the employee master record.

This work instruction shows how to add an employee record.

### NIS Policies

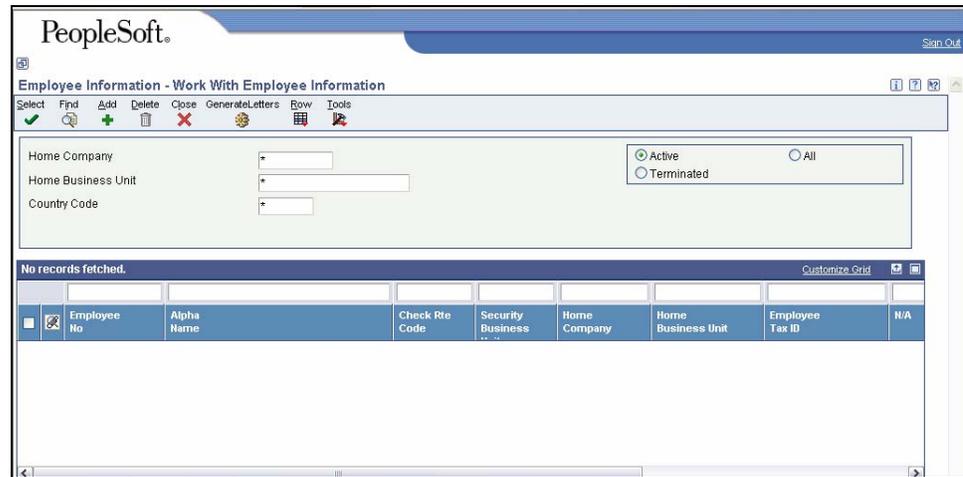
The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

### Navigation

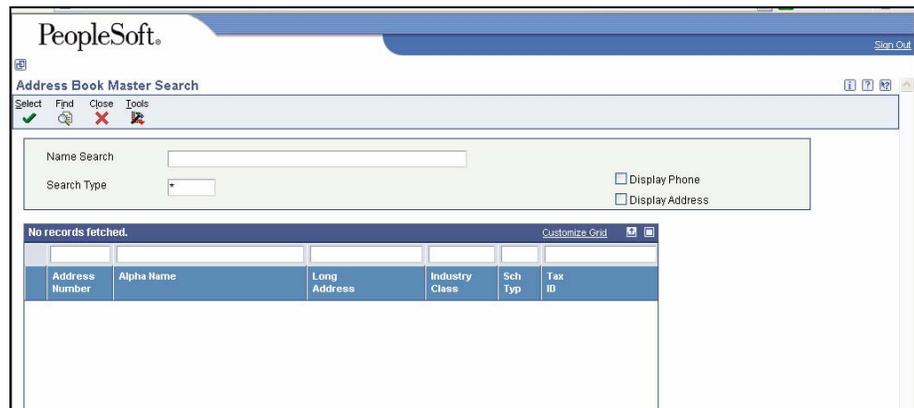
Click Roles, HR\_PR .  
(Citrix users – right click on the menu, choose View by Role, choose HR\_PR.)  
Human Resources and Payroll – Agencies > Employee Maintenance >  
Employee Information

## Steps

Start this instruction from the Employee Information – Work with Employee Information window.



1. Click on the QBE (query-by-example) line directly above Employee No in the grid.
2. Click on the Visual Assist  icon. The Employee Information – Address Book Master Search window appears.



3. Type the Employee's Social Security number without spaces or dashes on the QBE line directly above Tax ID in the grid. (ex. 123456789, not 123-45-6789)
4. Click **Find**. "No records fetched", indicates the Social Security number does not exist in the Address Book.
  -  The system does not let you enter duplicate Tax IDs. If an Address Book record exists for this employee, the system displays an error message to indicate a duplicate number when the last employee master screen is entered.

5. Click **Close**.

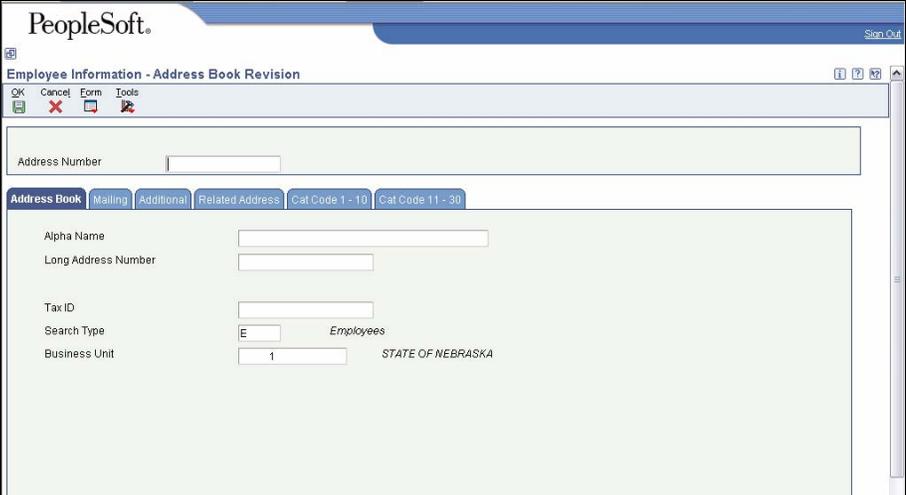
 If the Social Security number does exist in the Address Book, and the search type is an "E" or "X", note the business unit for the employee and contact the appropriate agency to transfer the employee (Ex. S290000000 is Agency 29 = Natural Resources). If there are "No records fetched", continue with Step 6.

6. On the Employee Information – Work with Employee Information window, click **Add**. The Employee Information – Employee window appears.

7. Complete the following fields:

- Security Business Unit – A Business Unit number that secures the employee's record from unauthorized access.
- Home Company – 10000 for **ALL** State of Nebraska employees
- Check Route – XX XXX XXX XX, for Agency (2 spaces), Division (3 spaces), Work Facility Code (3 spaces), Sequence # (2 spaces).
- Pay Frequency – Bi-Weekly or Monthly.
- 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.
- Employee Benefit Status

- Benefit Group – The benefit group to which the employee is assigned.
    -  Please refer to the [Benefit Groups Eligibility](#) Quick Reference Card in the HR/Payroll manual.
  - 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.
  - 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.**
  - Date Pay Starts
  - Agency Original Hire Date – the date the employee started with the particular agency.
  - Country – Leave as default to US.
8. Click **Con't** (Continue). The Employee Information – Address Book Revisions window appears.



-  It is important to press the tab key on the keyboard through each field on the Address Book tab and then click on the Mailing tab to get the OK button on this screen
9. Tab past Address Number field – the system will assign an Address Number.
10. Type the employee's name in the Alpha Name field.
  -  Type the name as Lastname, Firstname, Middle Initial.
  -  For more information on how to properly enter a name in the address book, please refer to the [Entering Information in the Address Book for HR](#) Quick Reference Card.
11. Type the employee's Social Security number in the Tax ID field without any spaces or dashes (ex. 123456789, not 123-45-6789).

12. Press the tab key through the Search type field.
13. Enter the employee's security business unit number in the Business Unit field.
14. Click **Mailing** tab.

The screenshot shows the PeopleSoft interface for 'Employee Information - Address Book Revision'. The 'Mailing' tab is selected. The form contains the following fields:

- Address Number:
- Mailing Name:
- Address Line 1:  City:
- Address Line 2:  State:
- Address Line 3:  Postal Code:
- Address Line 4:  Country:
- County:

15. Complete the following fields:
  - Mailing Name – First name, middle initial, last name
  - Address Line 1 – Employee's street address
  - City
  - State – Abbreviation for the State
  - Postal Code – Zip Code
  - Country – Leave blank for USA (default)
  - County
16. Click **OK**. Employee Information – Supplier Master Revision window appears.

- ✎ An Address Book Number for the Employee appears as the Supplier Number.
- 17. Enter **000** (three zeros) in the Payment Terms – A/P field. Everything else defaults in.
- 18. Click on the **Tax Information** Tab.
- 19. Enter a "P" in the Person/Corporation field.
- ✎ 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.
- 20. Click **OK**.
  - ✎ You will get a "yellow" Address Book Record Search Type Warning -- you can ignore the warning.
- 21. Click **OK** to create the Supplier Master. The Employee Information – Personal window appears.

- 22. Complete the following fields:

- Ethnic Code
- Date of Birth
- Gender
- Employee Age (As of Jan 1st) –

23. Click **Con't** (Continue). The Employee Information – Organizational Assignment window appears.

 The following example only shows the top portion of the window.

24. Complete the following fields:

- Supervisor – Employee's supervisor's address book number.
- Home Business Unit – Business Unit to which employee is assigned.
- Position ID – The Position ID the employee is occupying.
- Job Code – The Job Code to which employee is assigned.
- Working Title – only if different from Job Code description
- Barg. Unit – will default from Job Master
- EEO Job Category – will default from Job Master
- Date in Current Position ID
- Date in Current Job
- Employment Status
- Organizational Business Unit (optional)
- Next Review Type (optional)
- Next Review Date (optional)

25. Click **Con't** (Continue). The Employee Information – Job Default Window appears.

26. Select **Only Use Defaults to Overwrite Blank Values**.



Make sure the Proposed Information is correct. If not, make any necessary corrections.

27. Click **OK**. The Employee Information – Basic Compensation window appears.

28. Complete the following fields, if necessary:

- Salary – Only complete this field for salaried employees.
- Hourly Rate – Only complete this field for hourly employees.
- Std Hrs/Day
- Std Hrs/Year
- Pay on Std Hours
- Overtime Exempt
- FTE – full time equivalents

29. Click **Form, User Def Cat 01-10**. The Employee/Job Category Codes 01-10 window appears.

PeopleSoft  
Employee Information - Employee/Job Category Codes 01 - 10

Employee No. 3483432 JAMES, RACHELA  
Home Business Unit 65025009 NIS  
Job Code K11122 Training Specialist I  
NA

Agency Number  
Category Code 02  
Category Code 03  
NITC  
O\*Net Code 00 General Description  
Union Code 004 RULES  
Census Code 062 Human Resources, Training, and  
Benefit Payroll Cycle  
Category Code 09  
Category Code 10

30. Complete the following fields

- **Agency Number** - Enter the Agency Number
- **O\*Net Code** - If not defaulted, enter 99
- **Union Code**
- **Census Code** - If not defaulted, enter 999

31. Click **OK** to return to the Employee Information - Basic Compensation window.

32. Click **Con't** (Continue).

 A yellow warning will appear.

33. Click **Con't** to clear the warning. The National and Fiscal Data – USA window appears.

PeopleSoft  
National and Fiscal Data - USA

Employee No. 3483432

First Name Initial Tax Area (Work)  
Middle Name Initial N/A  
Tax Area (Residence) N/A  
N/A N/A  
Residency Status

Marital Status (Federal) [S] N/A [S] EIC Status  
Marital Status (State) [S] N/A [ ] Tax Method  
N/A [S]

Worker's Comp [ ] [ ] No Workers' Comp Code Disability [ ]  
I9 Status [ ] Veteran [ ]  
Disabled Veteran [ ]

34. Complete the following fields:

- First Name Initial
- Middle Name Initial
- Tax Area (Residence) - 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.

- Residency Status - enter "R" to ensure that any additional State Income Tax withholding will calculate correctly.
- 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.
- Marital Status (Federal)
- Marital Status (State)
- Marital Status (Resident)\*
- Marital Status (Local)\*
  - ✎ Marital Status fields will default with "S". These fields should all match.
- Tax Method - to exempt an employee from Social Security/FICA only, enter 4. To exempt an employee from both Medicare and FICA, enter 5.
- I9 Status
- Disability
- Veteran
- Disabled Veteran

35. Click **Finish**. The Change Reason window appears.

36. Verify the following fields:

- Effective On – hire date
- Change Reason – 001 – New Hire defaults.

37. Click **OK**. The Employee Tax Overrides window appears.

| Records 1 - 2            | Tax Area Overridden | Tax Type | Description        | Fe Ex | N/A | Additional Withholding | F T | N/A |
|--------------------------|---------------------|----------|--------------------|-------|-----|------------------------|-----|-----|
| <input type="checkbox"/> | FEDERAL             | A        | Federal Income Tax |       |     | 0.00                   | A   |     |
| <input type="checkbox"/> |                     |          |                    |       |     |                        |     |     |

38. Complete the following fields in the grid:

- Fe Ex – 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 Tax Area field, and F in the Tax Type field.

- Additional Withholding – Withholding an additional amount to be withheld over and above the calculated withholding.
- FT – flat tax (select from the items in the table below using visual assist)

|          |   |
|----------|---|
|          |   |
| <b>%</b> | A percentage that replaces the tax rate from the tax table.   |
| <b>A</b> | An amount that is added to the tax computed from the tax table.   |
| <b>F</b> | An amount that replaces the tax computed from the tax table.  |
| <b>X</b> | An additional amount added to the standard exemption amount and deducted (exempt) from the annualized gross pay to determine taxable pay. |
| <b>Y</b> | An amount that overrides the standard exemption amount and is subtracted from the annualized gross pay prior to the tax calculations.     |

If state withholding equals Federal then complete the Fe Ex field and skip to step 39, otherwise on Line 2 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

39. Click **OK** to return to the Employee Information – Work with Employee Information window.
40. Type the new employee's address book number in the Employee No field and click **Find** to locate the Employee just entered.
41. Choose the employee on the QBE line by placing a check mark in the row.
42. Click **Row, User Defined Dates 11-20**. The Employee Information - User Defined Dates 11-20 window appears.

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Employee Information - User Defined Dates 11 -20

Employee No. 3483940 TEST, LINDSEYA

|                                  |                      |                      |                      |
|----------------------------------|----------------------|----------------------|----------------------|
| Agency Adjusted Service Date     | <input type="text"/> | User Defined Date 16 | <input type="text"/> |
| Adjusted Job Code Seniority Date | <input type="text"/> | User Defined Date 17 | <input type="text"/> |
| Enrollment Effective Date        | <input type="text"/> | User Defined Date 18 | <input type="text"/> |
| User Defined Date 14             | <input type="text"/> | User Defined Date 19 | <input type="text"/> |
| User Defined Date 15             | <input type="text"/> | User Defined Date 20 | <input type="text"/> |

43. 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.
44. Click **OK**. The Change Reason window appears.
45. Enter the Effective Date and Change Reason. Click **OK**. The Employee Information - Work with Employee Information window appears.
46. Click **Close**.