Employer Administrator- Add a New Employee (Hire/Rehire)

Overview

This job aid is to guide Employee Administrators adding a new employee or rehiring a terminated employee (e.g., previous camp or kettle worker). If it is a rehire at the same Ministry Unit the entry of the SIN # will prompt UltiPro to retrieve the employee information. The employee administrator updates the information as required.

New Hire/Rehire Process

1. Employee administrator adds and submits employee information into UltiPro using the procedure outlined in this job aid.
2. UltiPro sends the submission for acceptance/denial to the Supervisor listed for the employee as well as the Divisional Director of Employee Relations for DHQ or the HR Operations Manager for THQ.
3. Once the submission is approved, the IT Dept is notified electronically by UltiPro that there is a new employee in the system.
4. IT creates an e-mail address and UltiPro password for the employee and sends it via e-mail to the Supervisor listed for the employee.
5. The UltiPro team receives the e-mail address from IT and completes the setup of the employee record. This may take 24 hours.

   Note: The IT Dept does not have access to employee files in UltiPro; they only get the name, employee number and supervisor name for the employee.

Att: Advise Supervisor:

- Please wait a few days after approving a new employee for the e-mail with the address and password to be processed.
- If e-mail address and password not received:
- E-mail the service desk requesting the password and e-mail address and provide the following information:
- Employee number, Employee name, Ministry Unit & Supervisor name and e-mail(this must be an @can e-mail address)

Advise Employees

- Once employees get into myArmy they will need to click on UltiPro to access the UltiPro system.
- The first time they access UltiPro they will need to verify your credentials.
- Enter seven digit employee number including all zeros. For example, 0078967. Employee number is assigned once employee is approved in UltiPro, and also displays on the pay statement.
- Enter first and last name as they appear on your pay statements.
- Click OK.
- Check e-mail for a verification e-mail. Click the link to complete the verification. Access UltiPro through MyArmy is now available.
- If there is any issue with logging on to myArmy send an e-mail to the service desk and include your employee number, name, ministry unit and an @can e-mail address that the new password can be sent to. This is done in order to confirm this person is legitimate and approved.

- Every 90 days you will be prompted to put a new password in.

NOTES:

- The first time you use UltiPro and go to Time and Attendance, you may encounter a pop-up blocker that prevents the time and attendance screen from appearing. Please refer to the “How to Turn Off Pop-Up Blockers” job aid on our resources page for help: https://salvationist.ca/finance/ultipro/resources/
- If an employee can get into myArmy but have an issue accessing UltiPro this is an UltiPro issue.
- E-mails sent to the service desk are filtered to the UltiPro team or the IT Team. So employees will need to specify if it is myArmy or Ultipro that they cannot access.
- An employee may use a g-mail, yahoo etc. account to request a new password however new passwords can only be sent to an @can e-mail address.

Adding New Employee/Rehire

Be Prepared

Gather the required information before you begin:

- Employee Personnel File with Offer letter,
- valid SIN (proof required –photocopy of card),
- void cheque,
- completed federal and provincial TD1 (completed by employee)

For further information see Section 21: Employee Personnel File – Contents in Employee Relations Procedure Manual.

Tip! Data entered can only be saved once you have completed the entry of all information. The system times out after an hour of inactivity and you will lose your data if it is incomplete. Ensure you set aside sufficient time to complete all the steps.

IMPORTANT: Once the new employee is approved you can see the employee records in UltiPro, but the employee will not immediately appear in time and attendance. **(See after approval steps at end of this document)**

NOTE - Rehiring kettle workers: Terminated kettle workers from last Christmas will be available in UltiPro to be rehired. However:

a. If the employee was terminated last year and did not have opening balances for this year they will have to be added as a new hire into UltiPro.
b. If the terminated employee was hired in MU A originally but MU B wants to 'rehire' them this year, then the employee will have to be hired at DHQ on behalf of the MU B.

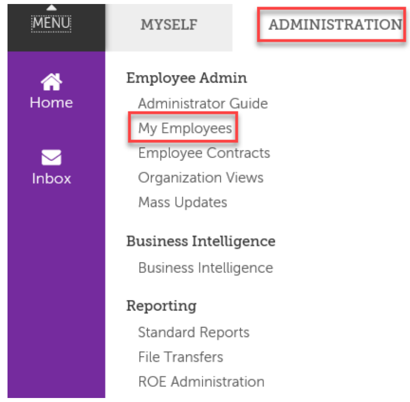
NOTE - Rehiring pensioners: When rehiring retired staff that are on pension use the *Add Canadian Employee (Hire/Rehire/Multi-Company Hire* option. Note that this is the only time this option is to be used. Ask Employee Relations for assistance.

Add Employee - Get Started

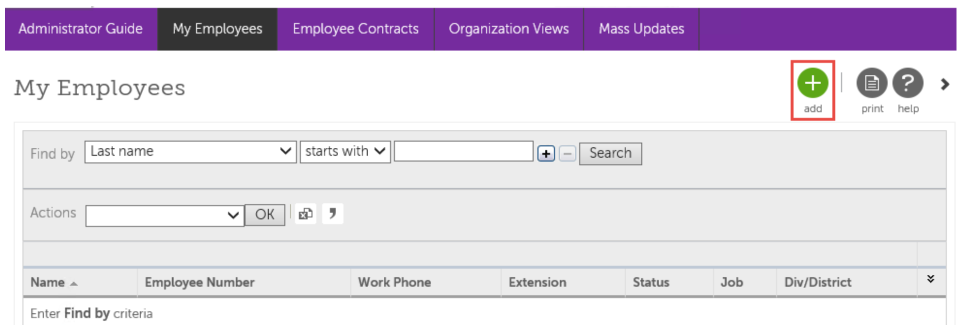
1. Click ***Menu.***

   Click ***Administration***.

   Click ***My Employees.***



2. The ***My Employees*** screen appears.



To add an employee:

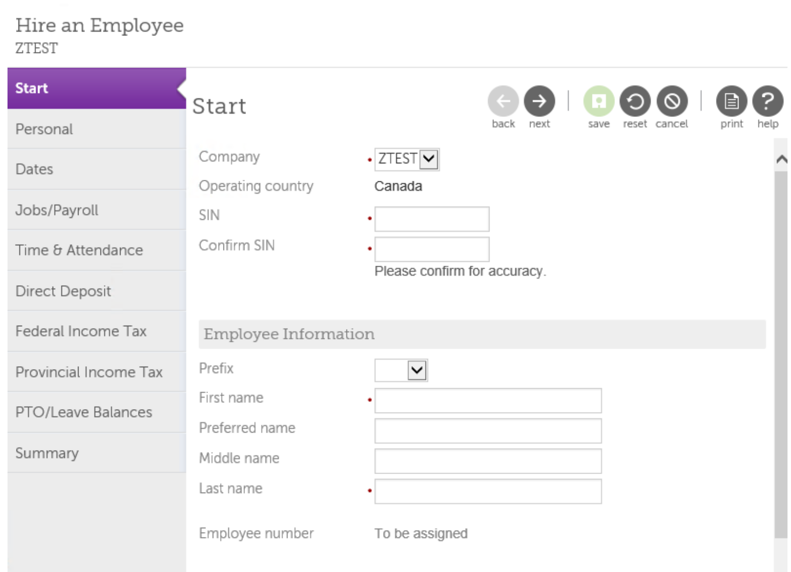
- click on the green ***Add*** icon as shown above
- or click on ***Add Employee (Hire/Rehire)*** option
- **IMPORTANT:** The Add Canadian Employee option is *only* used to rehire pensioners.

3. The ***Hire an Employee*** window displays. You must complete all mandatory fields (red asterisks).

4. Click the drop list for ***Company*** and make a selection.

5. Type in a valid ***SIN number***, and ***employee name***. This should be in the employee file.

6. Click ***Next***.



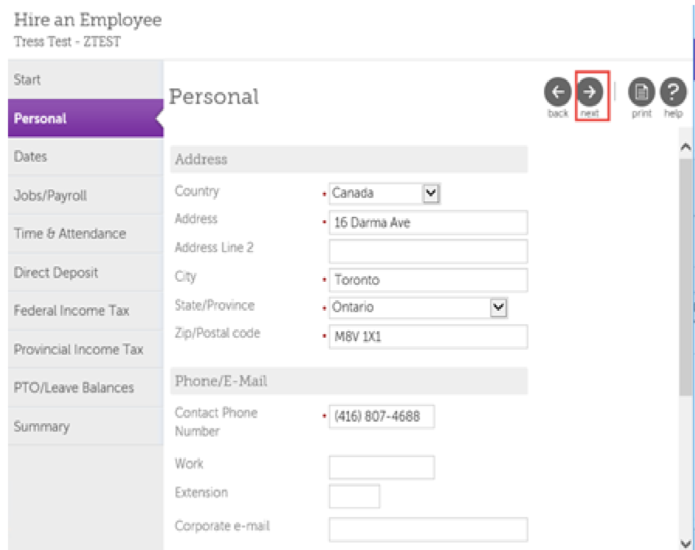
Note: SIN numbers that start with 9 indicate the use of a work permit. If the SIN card starts with a 9, an expiry date field will display. Enter the expiry date associated with this SIN. The expiry date will be on the SIN card or its equivalent government-issued document. Also note that if the SIN starts with a 9, this person cannot be hired to a permanent role.

REHIRE: Once the SIN number is entered the system will recognize if the employee is a new hire or a rehire. If it is a Rehire the data fields will be populated with employee information. Edit this information as necessary.

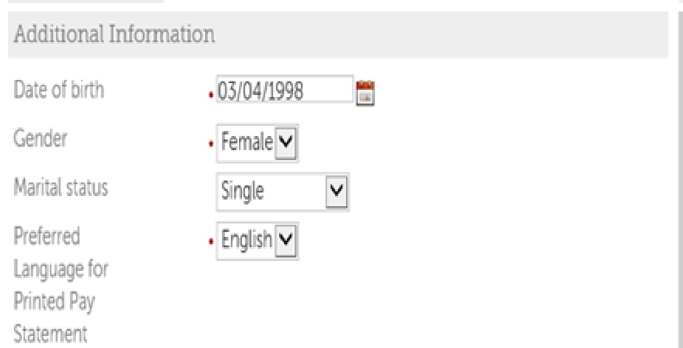
Personal

7. The ***Personal*** step displays. Type in the employee **Address** and **Phone** information.

   Scroll down the screen to ***Additional Information*** area.

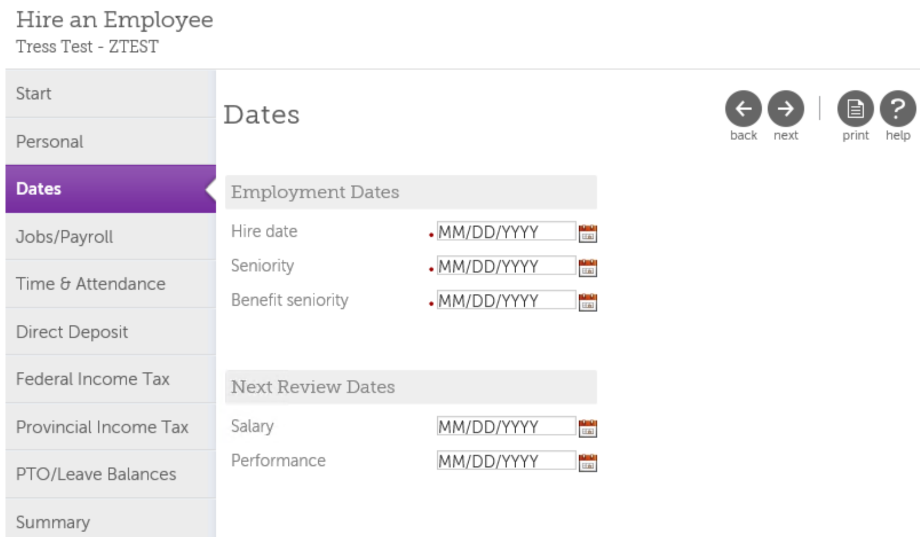


8. In the ***Date of Birth*** field click the ***calendar icon*** and select the year, month and day of birth.
9. Select ***Gender***.
10. Select **Marital Status**.
11. Select Preferred ***Language***.
12. Click **Next**.

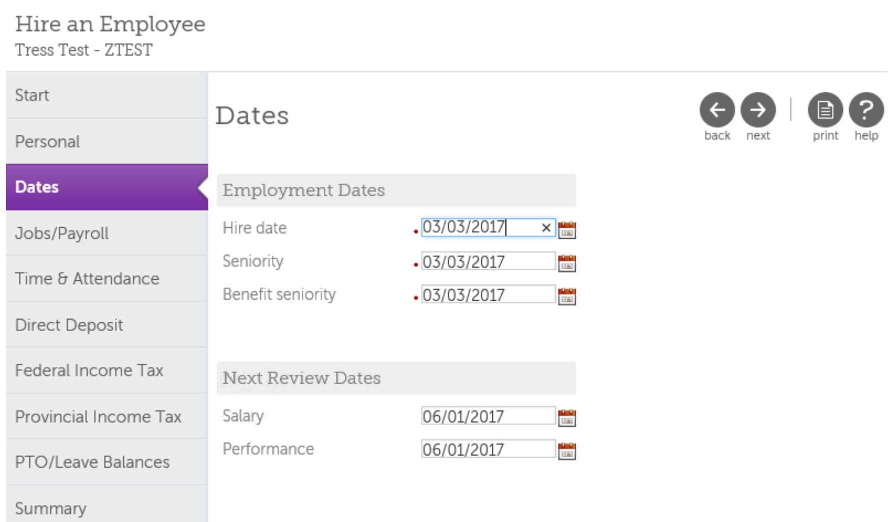


Dates

13. Click the calendar icon beside ***Hire Date*** field. Select their start date.

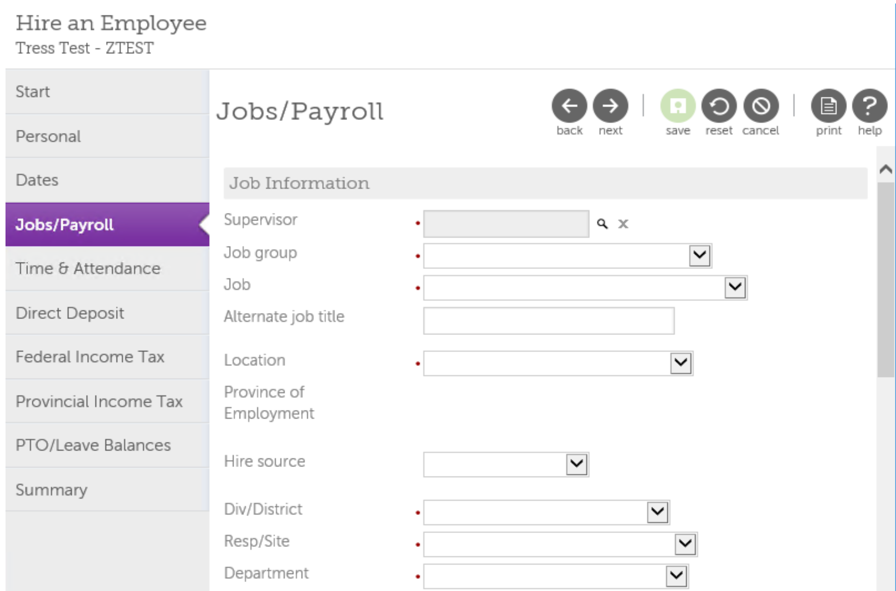


14. The other employment dates and review dates autopopulate.
15. Click ***Next***.

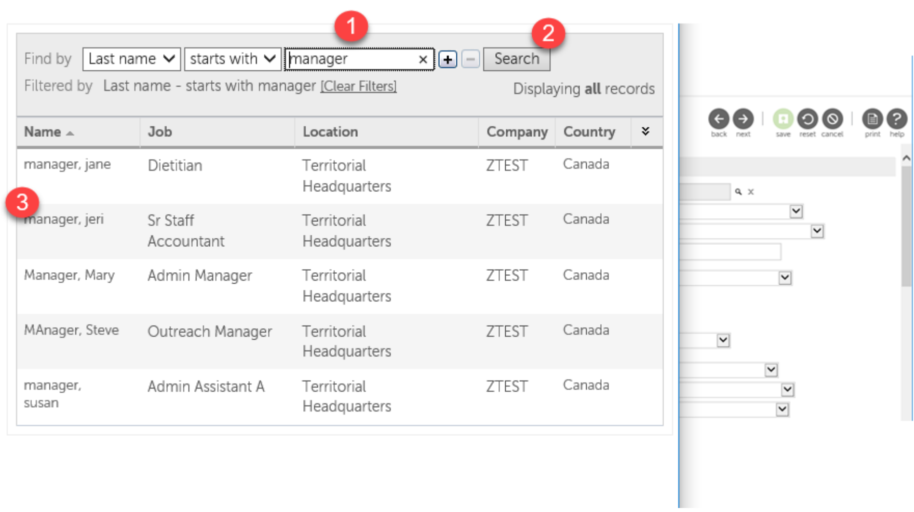


Jobs/Payroll

16. Click the magnifying glass icon beside the ***Supervisor*** field.

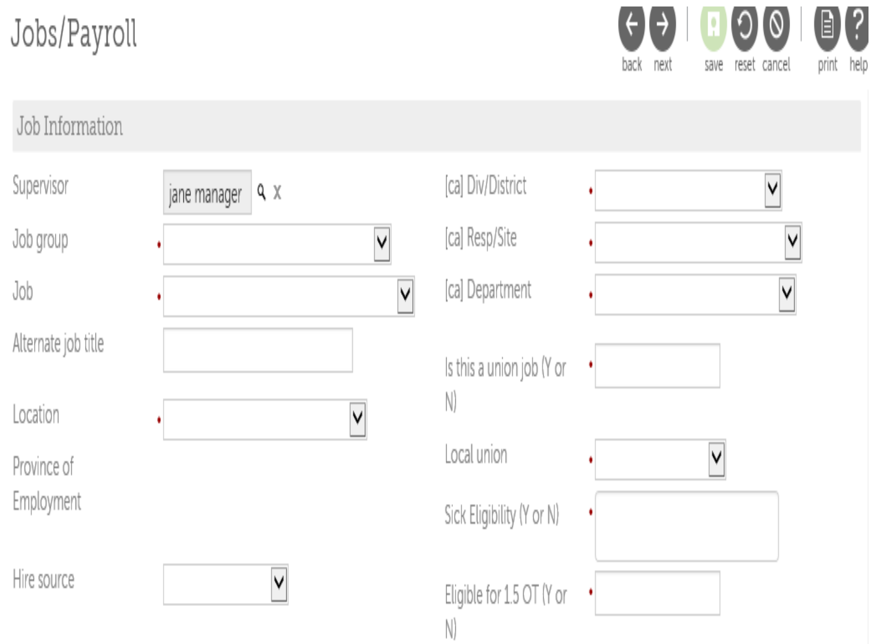


17. The ***employee selection*** screen appears. Run a search for the required manager.
18. Click ***Search***.
19. Click the manager's name.



NOTE: the manager selection is also the individual who authorizes the new employee entry. Ensure your choice is an active manager in the UltiPro system.

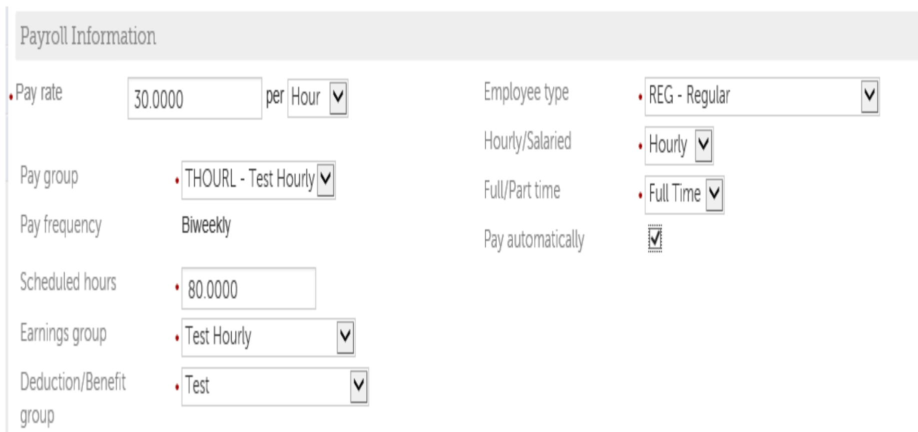
20. The ***Supervisor*** field displays the selected manager.
21. Click the droplists for ***job group*** and ***job*** and make selections.
22. The ***job*** list is generic. If the desired job name is not there, type it into the ***Alternate Job Title*** field. What appears in this field displays on the employee pay statement.
23. Click the drop list and make a selection for ***Div/District***, ***Resp Site***, and ***Department*** fields.
24. ***Is this a Union job***? Type Y or N.
25. If the job is non-union, select ***Non Union*** from the local union drop down list, otherwise select the correct union from the list.
26. ***Sick elegibility*** – Does this employee receive sick days? Type Y or N. Casual and relief staff are not eligible.
27. **Eligible for** 1.5 OT? Type Y if they are eligible for overtime at time and a half.



Scroll down to display Payroll Information fields.

28. Type in ***pay rate*** and select if per hour/week/year.
29. Select ***Pay group*** for your division/region. (**See next page for list of choices)**
30. Type in scheduled hours. For casual enter 16.
31. Select ***Earnings group*** – specific to each Ministry Unit.

    NOTE: For Kettle and part time the earning group is Hourly TE (Time Entry).



32. Select the appropriate ***Deduction/Benefit Group***. (if unsure, check with DHQ)
33. Select ***Employee type***.
34. Select ***Hourly*** or ***Salary.***
35. Select ***Full-time/Part-time***. If the employee is temporary or part-time, select part-time.
36. Click ***Pay Automatically*** if employee is Full Time/Part Time Salary Auto Pay.
37. Click ***Next***.

SALPAY/AUTO-PAY PAY GROUP

- Divisions List (All Salary or Auto-Paid Hourly Employees are included in this Pay Group)

ALB - Alberta and Northern Territories Division
BC - British Columbia Division
MAR - Maritime Division
NFL - Newfoundland & Labrador Division
OCE - Ontario Central East Division
OGL - Ontario Great Lakes Division
PRA - Prairies Division
QUE - Quebec Division
THQ - Territorial Headquarters

ONTPAY PAY GROUP

- Divisions List (Only Hourly Employees are included in this Pay Group)

OCE - Ontario Central East Division
OGL - Ontario Great Lakes Division
THQ - Territorial Headquarters

EASPAY PAY GROUP

- Divisions List (Only Hourly Employees are included in this Pay Group)

MAR - Maritime Division
NFL - Newfoundland & Labrador Division
QUE - Quebec Division

WESPAY PAY GROUP

- Divisions List (Only Hourly Employees are included in this Pay Group)

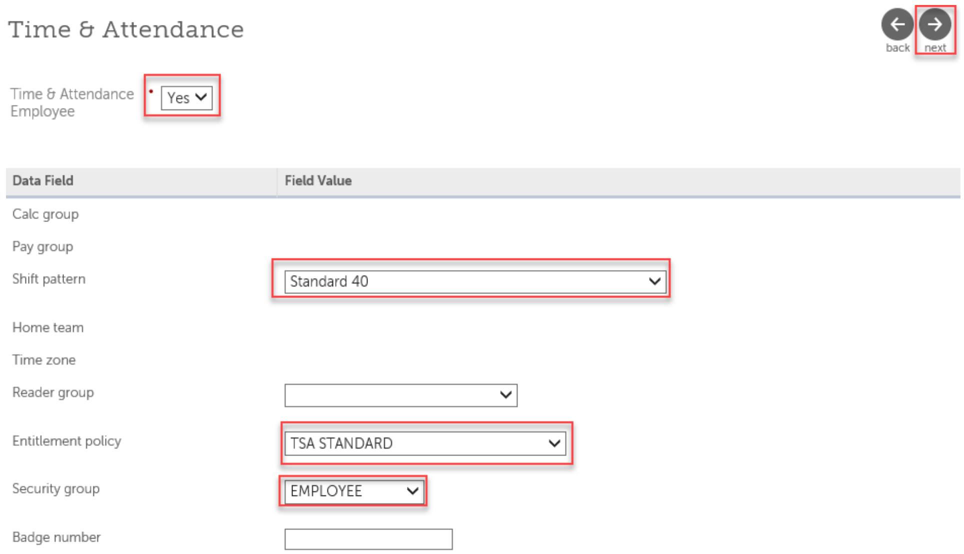
ALB - Alberta and Northern Territories Division
BC - British Columbia Division
PRA - Prairies Division

WINPAY PAY GROUP

- Divisions List (Only Hourly Employees are included in this Pay Group)

OGL - Ontario Great Lakes Division (Windsor CRC)

Time and Attendance.



38. In ***Time and Attendance*** always select Y unless it is an active officer (not a retired officer).

    For rehire select ***No***. Complete Time and Attendance fields once employee is approved.

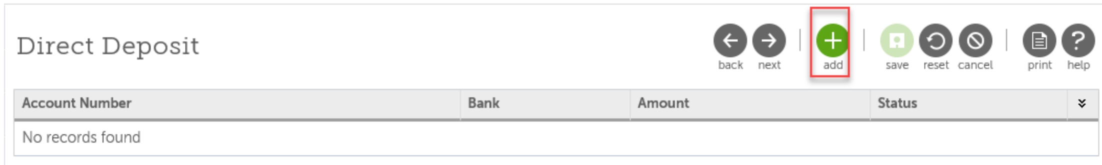
39. For FT/PT regular employee select a ***Shift pattern***. This populates the employee timesheet in Time and Attendance.
40. If this employee uses a timeclock select from the reader Group field.
41. Select an ***Entitlement policy*** from the drop list.

    NOTE: Entitlement is the vacation, sick and other plans (float, medical etc. depending on location) that the employee is entitled to. For non-union staff, TSA vacation and sick policies have been set up in UltiPro. If TSA, only select TSA plans. For unionized staff refer to their collective agreements.

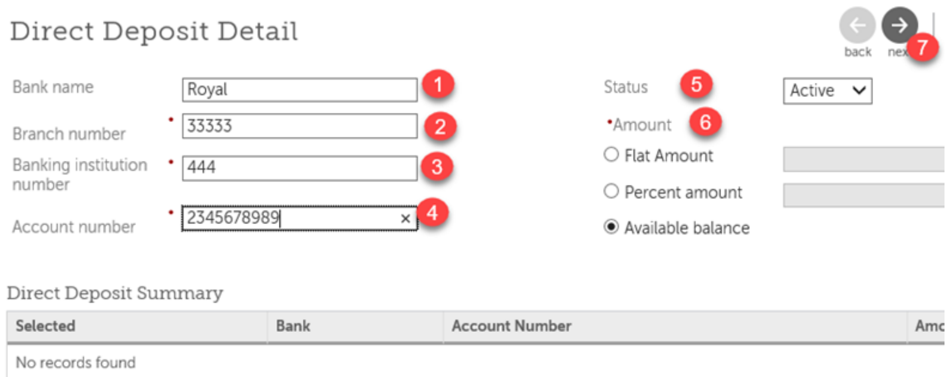
42. Select a ***Security group*** from the drop list to determine what the person can do and view.
    - See ***Assigning Security Role*** job aid for further assistance.
43. Click ***Next***.

Direct Deposit

44. Click ***Add***.



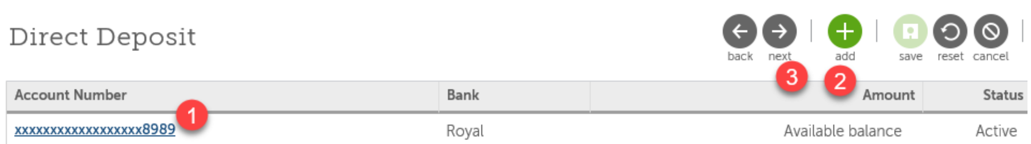
45. Refer to the employee's void cheque.



Type in:

1. Bank name.
2. Branch number.
3. Institution number.
4. Account number.
5. Keep **status** as active.
6. Choose **amount** to go to this account. Since this is the primary account, select **Available balance**.
7. Click ***Next***

For Rehire



1. The existing account information displays. Click the ***account number*** to edit if necessary.
2. Ensure status field is showing as ***active***.
3. Click ***Next.***

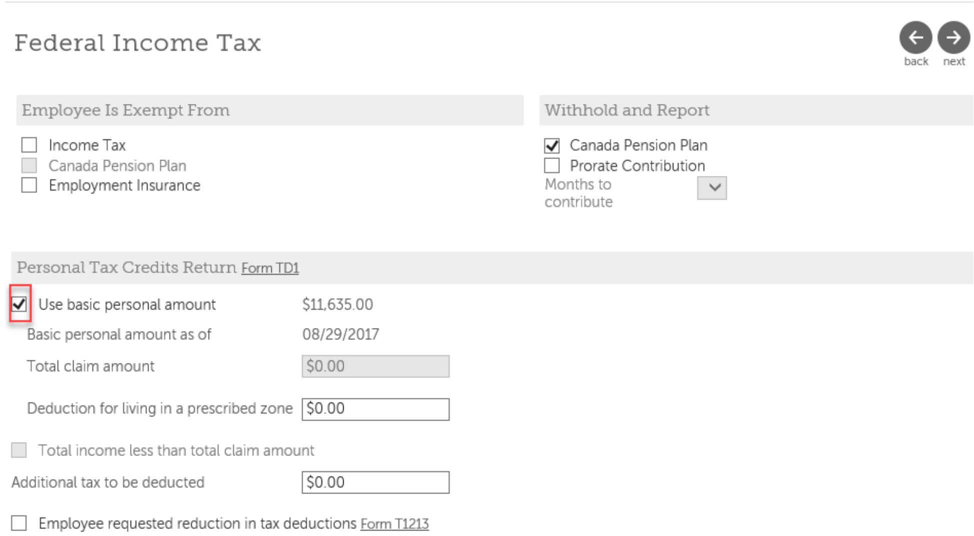
How to Read a Cheque

The branch transit number, financial institution number, and bank account number are located at the bottom edge of your cheque. Branch transit numbers are always five (5) digits and financial institution numbers are always three (3) digits. Bank account numbers may be up to 12 digits.

Income Tax

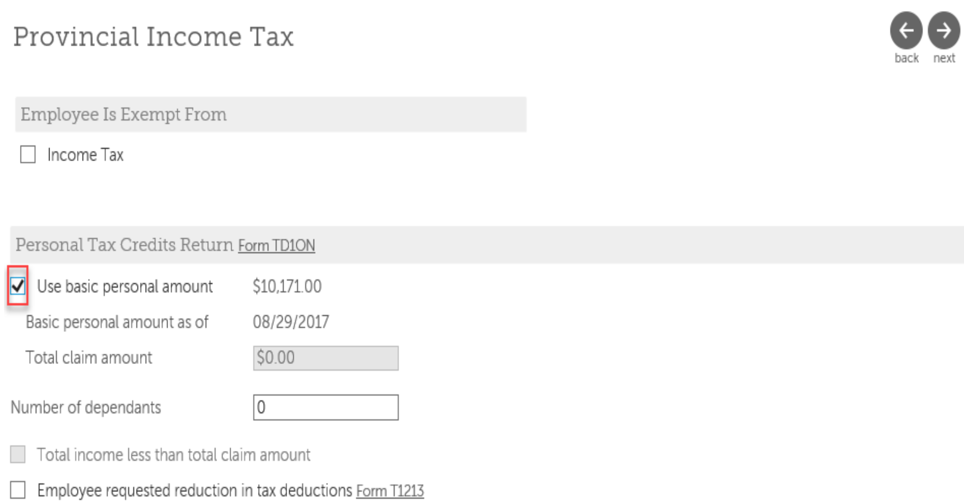
This screen shows the federal tax information from the Personal Tax Credits Return (TD1).

46. If there are changes, deselect ***Use basic personal amount***, and make edits.
47. Click ***Next***.



This screen shows the provincial Ontario Personal Tax Credit Return (TD ON1).

48. If there are changes, deselect ***Use basic personal amount***, and make edits.
49. Click ***Next***.

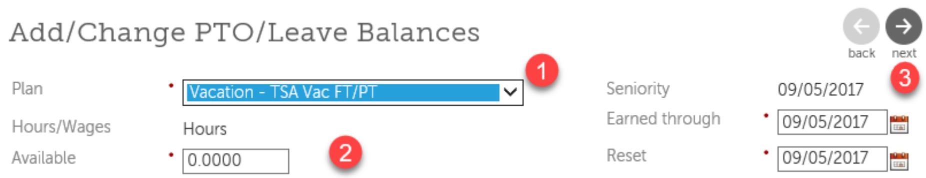


NOTE: If more detailed edits are required to the income tax forms, these edits can be completed once the employee has been hired and is in the UltiPro system. (See ***Editing Taxes*** job aid).

PTO Balances

50. Click **Add** to add a PTO plan.

51. Click the drop list for **Plan** and select a PTO plan. This could include a vacation plan, a sick plan and a mental leave/health plan.



NOTE:

- PTO selection must align to the entitlement policy selected at the ***Time and Attendance*** step. E.g. If TSA Standard Entitlement Policy was selected, and then select only TSA plans.
- **Union staff:** Union selection, Entitlement Policy and PTO plans must match. If they don't match, PTO balances may not transfer to UTA.
- **Kettle workers and part time staff:** Typical PTO plan is Vacation plan **"VacTempPayout6%"** and not eligible for sick plans. (but are eligible for OT)
- Anyone who is attached to an accrual vacation plan (non vacation payout plan) must also be attached to this plan Vaca Additnl %. This is meant to ensure employees are accruing vacation on extra / OT hours in cases where they work extra hours.
- Refer to job aid "*Adding PTO Plans*" for a list of PTO selections.

52. Type in available hours for the plan. For vacation, if they are accruing, use daily hours multiplied by the remaining months. (1.25 day per month up to end of year).

    For sick time, they need to earn it and are not entitled until after 3 months' probation (enter zero hours for sick plan). Only THQ gets medical plan of 8 hours a year. Some districts have Mental Health plan.

53. ***Seniority Date*** is the actual hire date.
    a. **Earned Through Date** for a new employees is the hire date.
       Reset Date is the date when the PTO plan "resets".
       - For new employees with Vacation % payout plans reset date is date of hire
       - For all other PTO plans, the reset date is either:
         - Last day of the year (December 31, 2017), or
         - Last day of the annual cycle if employee is governed by a Collective Bargaining Agreement (e.g., March 31, 2017)

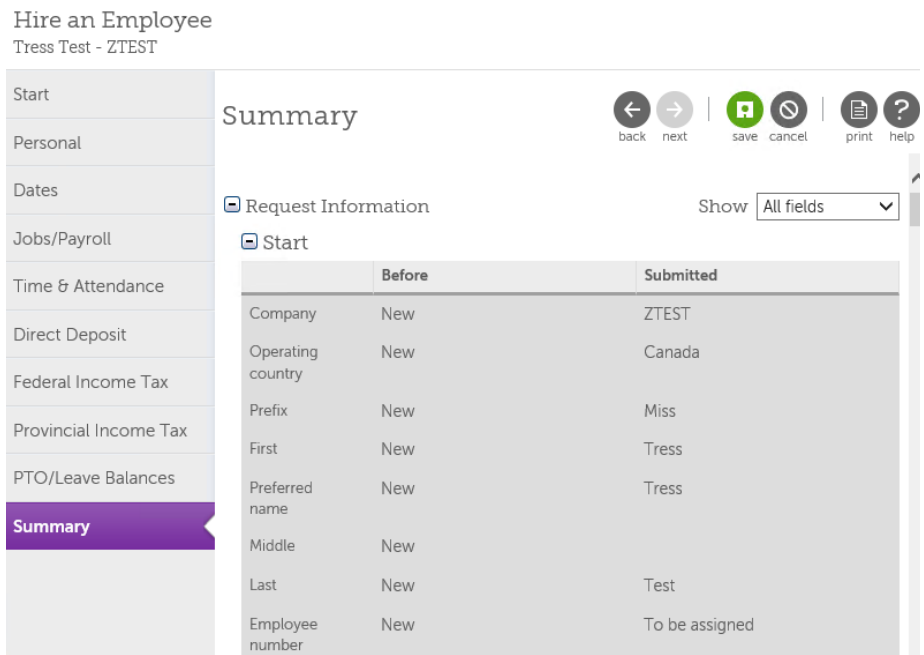
54. Click **Next**. The plan is now saved.

55. Click **Add** to add another plan or **Next** to continue.

Summary

All new employee fields have been completed. A Summary of the entered information displays. Scroll down to view all the entries. If changes are necessary click ***back*** to move through the screens to make edits. Compare the entries made against the documents you have available. **Ensure the information entered is correct before continuing to the next step.**

56. If all entries are correct, click ***Save***.



The ***Submit*** screen appears.

57. Click ***Submit***. At this point you can no longer edit the content you added.
58. The Summary information is automatically forwarded to the hiring manager for approval/authorization.

59. Scan the documents (hiring letter, voided cheque, TD1s) and e-mail them to the authorizer to help them review and approve the new hire data.
60. Once your submission is authorized or denied a message will appear in your UltiPro Inbox.
61. If your submission is denied, identify your errors and repeat the ***Add Employee Hire/Rehire*** procedure.
62. If your employee entry has been approved/authorized see below.

After employee is approved:

1. Approval status will show in your ***Completed*** display in your Inbox and the employee is added to your My Employees list.
2. Access the new employee and click on ***Documents***. Add digital copies of hiring letter, voided cheque, TD1s.
3. Now that the new employee is in UltiPro ensure ***Time and Attendance*** area is edited as necessary.
   - If this is a **Rehire** employee change Time and Attendance employee field to '**Yes**'. Complete required fields. (**see step 36**)
   - **Badge number**- If your unit has a clock, this field MUST be populated. If the employee has a card use the badge number on the card. For those that don't use cards (timeclocks and web clocks) use the employee's 7 digit employee number or another unique number.
   - Select a **Reader Group** for clock employees.
4. If you assigned the Timekeeper role send a request to UltiPro support through ServiceDesk e-mail asking that the individual be given that role for this team (include team member names or MU).
5. IT Dept. creates the e-mail address and notifies the employee's Manager. This may take a few days.
6. The UltiPro team receives the e-mail address from IT and completes the setup of the employee record. This may take 24 hours.
7. Now the new employee can log into MyArmy and have access to UltiPro.