



JOB GUIDE FOR MANAGERS LASERFICHE HIRE/ONBOARDING – Staff

*****Special Note:** Hiring Managers should initiate the Laserfiche Onboarding Process prior to making a verbal offer to the final candidate. This stage occurs immediately after the recruitment process which should have already included the completion of the posting of the job advertisement, interviews, and reference checks.

HIRE/ONBOARDING REQUEST FORM FOR STAFF

Congratulations on identifying a candidate you want to hire! HROE wants to partner with you to ensure your new employee has a positive onboarding experience and is appropriately prepared for day one and positioned for success. Please complete this form which will help us onboard your new hire.

Required fields are marked with a red asterisk*. Non-required fields do not have to be completed, but the information (if known) can help your HR Professional process your request more efficiently. Once submitted, this form routes to your HROE Customer Support HUB. Your HUB HR Generalists will review and correct any fields, if needed.

If you need help completing this form, click the link <https://employees.tamu.edu/Hubs.html> to contact your Customer Support Hub.

WORKER TYPE

Action for *

Select: Staff

Type of Staff Position*

Select from the drop-down list:

- Faculty-equivalent position (e.g. Postdoc, Senior/Principal Research Engineer)
- Budgeted Staff
- Temporary/Casual

Which System Member will the employee be hired under? *

Select the department's System member the drop-down list.

Which College, School or Division will the employee be hired under? *

Select the College, School or Division from the drop-down list.

Department/Center/Administrative Unit *

Select the department the employee will be hired into from the drop-down list.

ACTION INFORMATION

Type of Action *

Select from the drop-down list:

- **New Hire or Rehire:** *A new hire occurs when an individual who is not currently an active employee of The Texas A&M University System is hired into a position.*
- **Transfer/Promote In:** *When an individual moves from one active position to another.*

- **Additional Job:** *currently an active employee in Workday and will not be resigning from their current job(s). This means that the employee will have multiple jobs in Workday.*
- **Other – Select this if you don’t know:** *You may select this if you are unsure of the correct action to choose. Please provide additional details as to why you did not pick one of the other Type of Action choices.*

NOTE: *Type of Action* field can be corrected later by an HR Professional.

- **Other *** - A text box will only appear if *Other* was selected for *Type of Action*. The Submitter can provide additional details as to why they did not pick one of the other *Type of Action* choices.

Requisition #: Field can be filled out if the hire is via a Workday requisition and the submitter knows the R#. HR Professional will review the R# later for accuracy.

Position PIN#: Field should be filled out if the department already has a pin# they want to use. HR Professional will review the pin# later for accuracy.

Position Title *

Select appropriate Staff title from the drop-down list.

NOTE: The drop-down list will only list approved titles associated with the Staff employee type.

Proposed Business Title (if applicable)

Also referred to as Working Title. Submitter may enter a proposed business title in text box.

Full-Time/Part Time*

Select from the drop-down list:

- **Full-Time (40 hours/week)**
- **Part-Time**
 - **Percent Effort*** - Enter the percent effort of this part-time new hire.

Position Length*

Select from the drop-down list:

- **Long Term:** *A long term position is one that is offered for 6 months or more.*
- **Temporary:** *A temporary position is one that lasts 4.5 months or less in a single fiscal year and cannot be extended. The minimum % effort must be 50% or greater.*
 - **Temp position end date*** - Enter the anticipated end date of the temporary position

Annual Work Period *

Enter (in number format) how many months out of the year the department wants this position to work in the text box.

Will this position be located in the Bryan/College Station area? *

NOTE: The purpose of this information is to determine if the new hire will attend in-person onboarding in College Station or at a different location.

Select from the drop-down list:

- Yes
- No

- If no, **where will this position be located?** * A text box will only appear if *No* was selected.

NOTE: Enter the city and state the new hire will be working in, in the text box.

List the Mail Stop *

Enter the Mail Stop in the text box.

SUPERVISOR (MANAGER) INFORMATION

Name *

Information will auto populate based on login credentials. Information can be edited as needed.

Email *

Information will auto populate based on login credentials. Information can be edited as needed.

Phone Number *

Information will auto populate based on login credentials. Information can be edited as needed.

EMPLOYEE/CANDIDATE INFORMATION

Last/Family Name *

Enter in text box.

First/Given Name *

Enter in text box.

UIN (if known)

Enter in text box.

Email *

Enter in text box.

Please re-enter Email *

Text box will require the email be re-entered and checked for a match. An error will pop-up if there is not a match.

Phone Number

Enter in text box.

Do you know if this new hire is a foreign national? *

Select from the drop-down list:

- **Yes**

- If yes, review the hiring information provided by both Immigration Affairs (<https://isfs.tamu.edu/>) as well as International Student & Scholar Services (<https://iss.tamu.edu/>) to determine the appropriate visa status for this foreign national employee. If the individual will be in J-1 exchange visitor status, their documentation will be processed by ISSS. For all other immigration statuses, consult with Immigration Affairs. There may be additional actions needed to obtain appropriate documentation, which could delay the hiring process.

- **No**

- **I don't know**

Pay Type *

Select from drop-down list:

- Hourly
- Monthly

Proposed Rate of Pay*

Enter monthly rate (without a dollar sign) for all monthly paid positions. Enter hourly salary (without a dollar sign) for hourly paid positions. If a rate of pay (hourly or salary) recommendation is needed, please contact your Customer Support HUB.

ADDITIONAL ALLOWANCE STIPEND SECTION**Additional Allowance/Stipend Amount**

Enter additional allowance/stipend amount, if applicable. Leave blank if not applicable.

- **Type of Allowance/Stipend*** - Enter in a description of the allowance/stipend. Note: this will only appear if a value is added to Additional Allowance/Stipend Amount field

Add Allowance

If paid hourly, does the employee receive overtime pay OR comp time in lieu of overtime pay?

- NA
- Comp Time
- Overtime

Relocation Allowance?

- Yes
 - **Amount*** - Enter the amount for the Relocation Allowance
 - **Account** – Enter the account number to charge the Relocation Allowance to.
- No

Will this employee supervise others? *

- Yes
- No

Request Summary/Justification/Notes

In the text box, provide a justification or summary for your request. If you are hiring above the Lower Band, provide justification here. **If an exception is needed to hire outside the common hire date, provide justification here.**

Proposed Hire Date/Action Effective Date *

Available dates are hard coded to the 1st and the 16th of each month. Additional hire dates may be added by HROE to account for busy periods. Select an available hire date.

Deadline for Employee to Complete Prospective Hire Form and Background Check

The text box will auto populate based on the *Proposed Hire Date* selected. If HROE does not receive the prospective hire form from the employee, their hire date will be pushed back two (2) weeks. If the date above has passed, you will need to push back the hire date to allow time to process.

Hiring Matrix

Upload the hiring matrix you used for this requisition. You may skip this step if you have already given this to your HROE HUB Professional.

Interview Notes with Scores

Upload your interview notes with scores. You may skip this step if you have already given this to your HROE HUB Professional.

Reference Check Notes with Scores

Upload your reference check notes with scores. You may skip this step if you have already given this to your HROE HUB Professional.

All relevant communication with candidates

Upload any relevant communication with the candidates. You may skip this step if you have already given this to your HROE HUB Professional.

Uploading the Offer Letter? *

Select from the drop-down list:

- Yes
 - If yes, **Offer Letter *** will appear.
Select *Upload* to upload Offer Letter.
- No: Select this if you do not have an offer letter to upload at this time.

Additional Attachments

Select *Upload* to upload any additional relevant information.

Department/Division Head Approval *

Select from the drop-down list:

- I have approval documentation from my Department/Division Head.
 - If selected, **Department/Division Head approval documentation *** will appear.
Select *Upload* to upload approval documentation from Department/Division Head.
NOTE: Approval documentation can vary by area (memorandum, email, etc.).
- I do not have the approval documentation and need this request to route to the appropriate approvers.

Budget Review: I have reviewed the budget and confirm that funding is available to support this request. *

Select from the drop-down list:

- Yes
- No

SOURCE OF FUNDING

Source of Funding

NOTE: Format: xx-xxxxxx-xxxxx (*Part Number-Account Number-Support Account*)

Enter account information in text box.

Percentage

NOTE: Defaults to 100%, but it can be edited if funding is to be split between accounts.

Enter percentage in text box.

End Date (if applicable)

Select Date

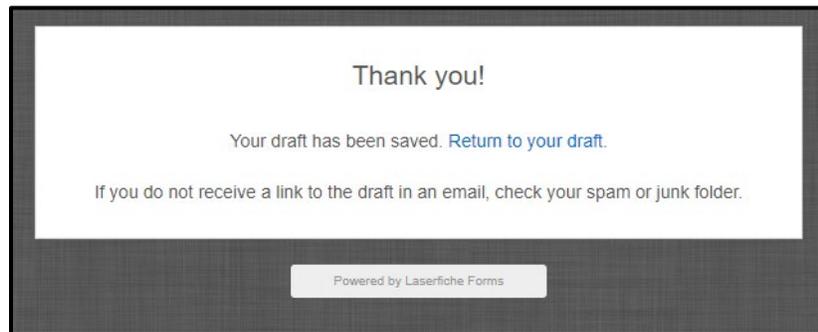
Add Another Source

NOTE: Select if you have multiple funding sources to enter.

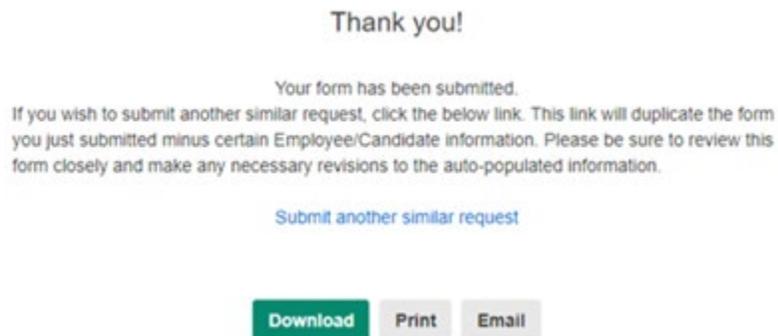
Submit or Save as Draft

Select:

- Submit
- Save as Draft
 - If the Initiator selects *Save as Draft*, the message below will appear and the submitter will receive an [email](#) with instructions on how to return to their draft.



After selecting *Submit*, the screen will appear with the confirmation message below.



NOTE:

- Laserfiche will also send a confirmation [email](#) to the Hiring Manager and Submitter. Details in the email such as Hiring Manger information, Submitter information, Department Name & Code, New Employee Name, Proposed Start Date, New Employee Title and assigned HROE Customer Support HUB will vary and be specific to the information captured in the Laserfiche Form.
- The HUB will receive an [email](#) alerting them that this action has been submitted in Laserfiche. The HUB HR Professional will review and take action on the task. HUB HR Professionals may click the email link to go to the task or use the Custom Report feature in Laserfiche to access the task.

SAMPLE EMAIL EXAMPLES

SAMPLE EMAIL TO RETURN TO SAVED DRAFT

From: LaserficheDev-DoNotReply@tamu.edu <LaserficheDev-DoNotReply@tamu.edu>
Sent: Wednesday, January 25, 2023 8:34 AM
To: Green, Paige C paige1green@tamu.edu
Subject: Your Hire/Onboarding Request form has been saved

Howdy,

Your Hire/Onboarding Request form has been saved.
[Click here to complete your form](#)

SAMPLE EMAIL TO HIRING MANAGER AND SUBMITTER

From: LaserficheDev-DoNotReply@tamu.edu <LaserficheDev-DoNotReply@tamu.edu>
Sent: Wednesday, January 18, 2023 2:08 PM
To: Hiring Manager
Cc: Submitter (if different)
Subject: IQSE: Confirmation of Hire/Onboarding Submission: Karthick, Priya

Howdy,

This is an automated confirmation that you have submitted a Hire/Onboarding request for **Karthick, Priya**. In order to process employment for **Karthick, Priya**, we will be reviewing the information and documents you provided.

Name: Karthick, Priya
Proposed Start Date: 1/22/2023
Title: Assistant Manager, Training and Development
Hiring Department: Institute Of Quantum Science
Laserfiche Tracking Number: 34374

Key steps in the process include:

- Review of hire request by HROE
- Approval for hire (if needed)
- Prospective Hire provides necessary information
- HROE processes hire
- Prospective Hire attends Onboarding session (if needed)
- HROE clears employee to begin working

It is imperative that all hiring managers understand that individuals are not allowed to begin working until all appropriate approvals have been secured and work authorization has been verified by HROE.

Later in the process you will be receiving an Onboarding Checklist to help you prepare in advance for the new employee's arrival. If a new workstation or equipment is needed for this position, please begin working with your IT contact now.

If you have questions, please reach out to:
HUB 1 - Leadership
hr1@tamu.edu
Texas A&M University
Division of Human Resources and Organizational Effectiveness

SAMPLE EMAIL TO HUB

From: LaserficheDev-DoNotReply@tamu.edu
Sent: Monday, January 23, 2023 12:59 PM
To: hr1@tamu.edu
Subject: IQSE: Hire/Onboarding: Karthick, Priya

A new Hire/Onboarding request has been submitted for your review. Click below to view the submission in a Web browser. After reviewing it, you can make your approval decision.

<https://it-trlf.tamu.edu/forms/form/approval/ba6e93b4-40ce-43f1-a8bc-4f80f638d06e?hideHeader=true>

Name: Karthick, Priya
Proposed Start Date: 1/22/2023
Title: Human Resources Generalist V
Hiring Department: Institute Of Quantum Science
Laserfiche Tracking Number: 34449