

# JOB AID

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## **HRMS Create and Maintain Payroll Master Data**

### ***New Hire***

**Section 1–For Personnel Administration Processors-page 1**

**Section 2–For Payroll Processor-page 16**

**Section 3–For Benefits Processor-page 22**





## HRMS Create and Maintain Payroll Master Data *Adding a New Hire*

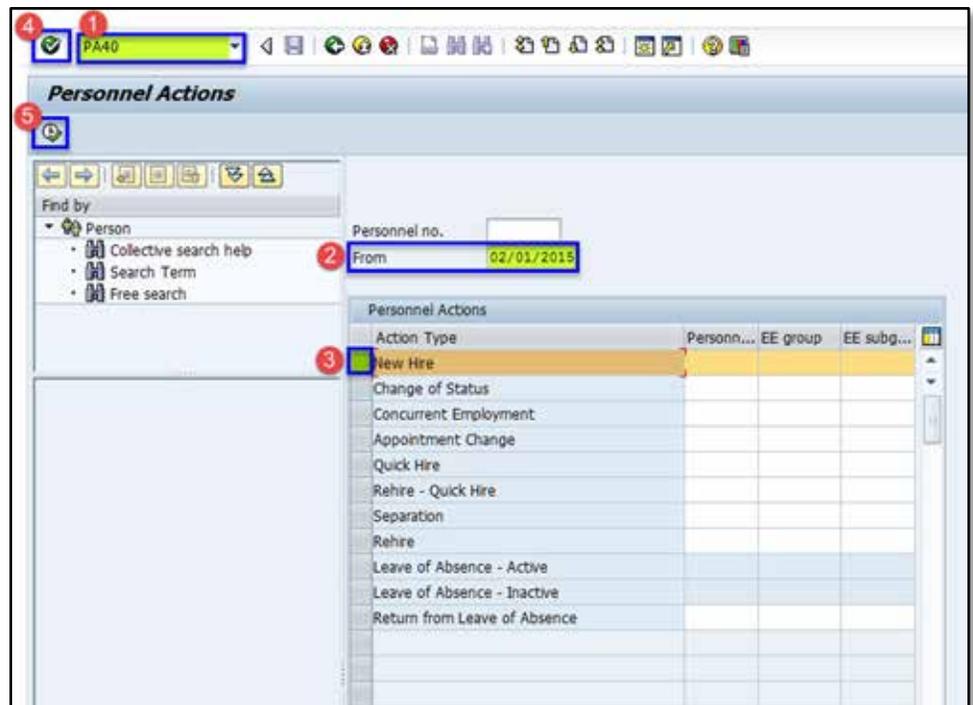
This procedure is used to hire a new employee into HRMS for the first time.

### Section 1–For Personnel Administration Processor

#### **IMPORTANT**

The actions in this section are completed by the **Personnel Administration (PA) Processor**. If you are the **Payroll Processor**, skip to **Section 2–For Payroll Processor**.

1. Start by entering Transaction Code **PA40** in the Command field and press the **Enter** key.
2. In the **From** field, type the effective date of the new hire appointment.
3. Select the box to the left of *New Hire*.
4. Click the **Enter** icon.
5. Click **Execute**.



## Section 1–For Personnel Administration Processor

### *ACTION: Create Actions (0000)*

1. Click inside the **Reason for Action** field. Click the matchcode button to view the selection list. Select the appropriate action, then click the **Enter** button.

**Example:** 02  
Probationary

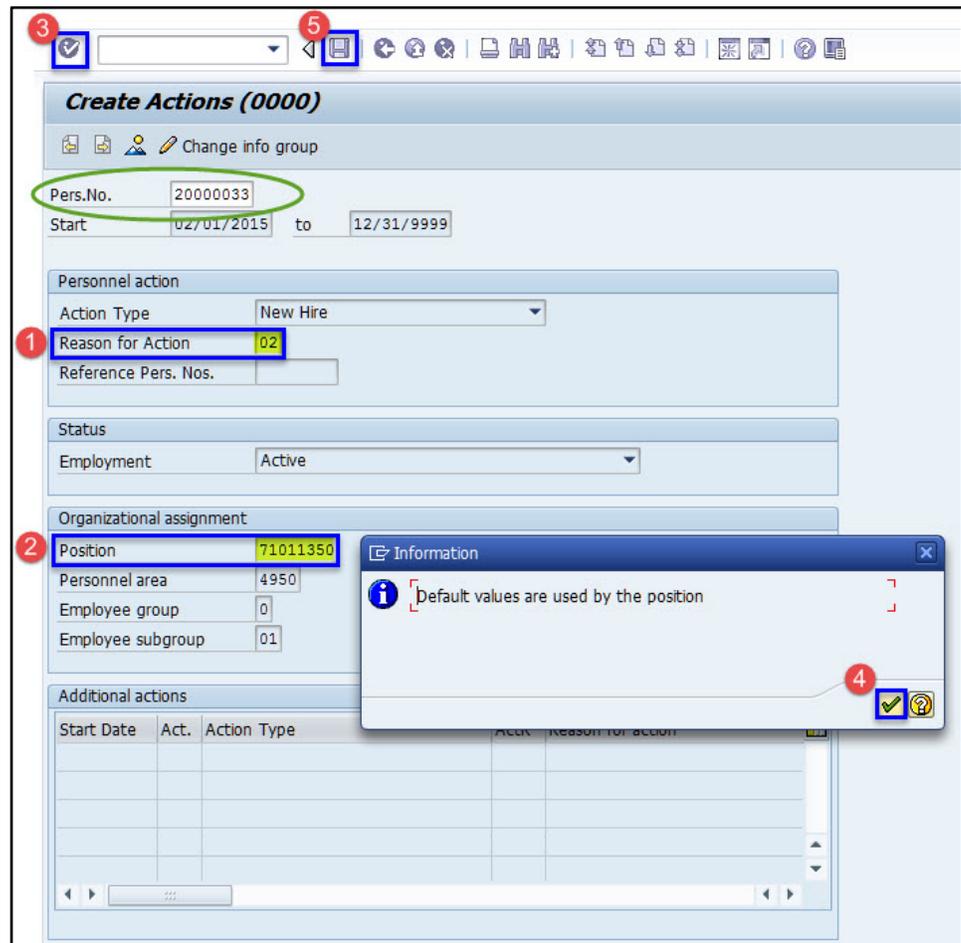
2. Enter the Position Number in the **Position** field.

**Example:** 71011350

3. Click the **Enter** icon.

4. An information window will appear. Click the **Enter** button. The employee's **Personnel Number** will now be generated.

5. Click **Save**.



**Create Actions (0000)**

Change info group

Pers.No. 20000033  
Start 02/01/2015 to 12/31/9999

Personnel action  
Action Type New Hire  
Reason for Action 02  
Reference Pers. Nos.

Status  
Employment Active

Organizational assignment  
Position 71011350  
Personnel area 4950  
Employee group 0  
Employee subgroup 01

Information  
Default values are used by the position

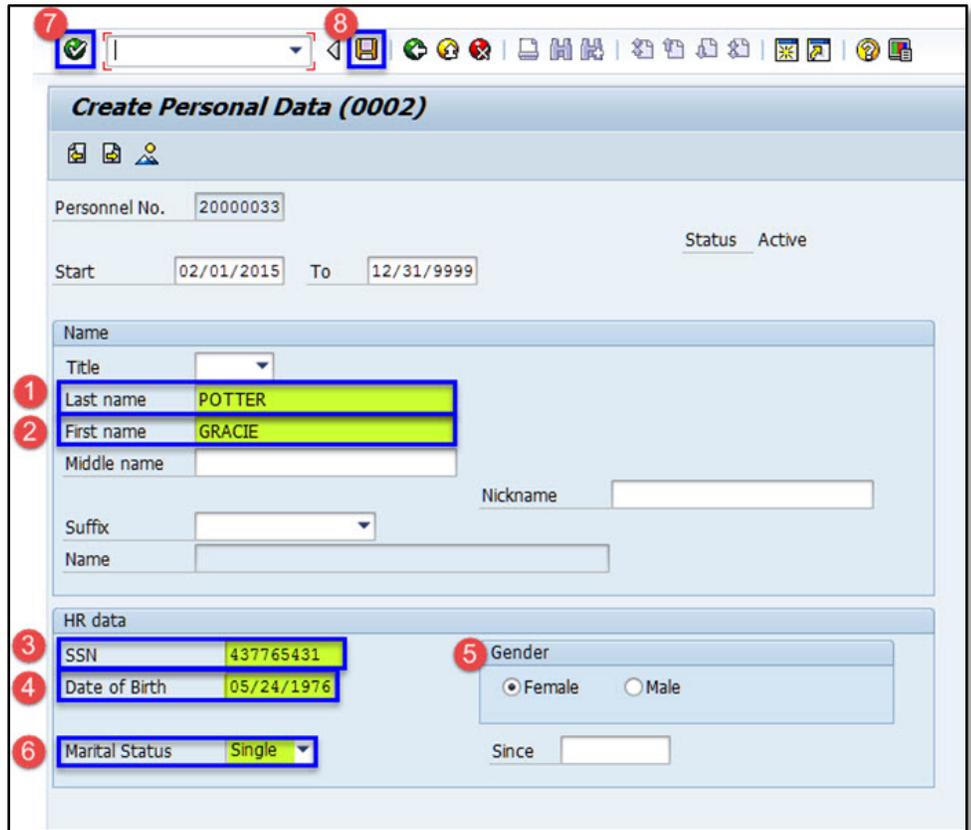
Additional actions

| Start Date | Act. | Action Type | ACCR | Reason for action |
|------------|------|-------------|------|-------------------|
|            |      |             |      |                   |

## Section 1–For Personnel Administration Processor

### ACTION: Create Personal Data (0002)

1. Enter legal **Last name** of employee as indicated on their Social Security card.
2. Enter legal **First name** of employee as indicated on their Social Security card.
3. Enter the employee's Social Security Number (**SSN**).
4. Enter the employee's **Date of Birth**.
5. Select the employee's **Gender**.
6. Choose the employee's **Marital Status** from the drop-down list.
7. Click the **Enter** icon.
8. Click **Save**.



The screenshot shows a web browser window displaying the 'Create Personal Data (0002)' form. The form is titled 'Create Personal Data (0002)' and includes the following fields and sections:

- Personnel No.:** 20000033
- Status:** Active
- Start:** 02/01/2015
- To:** 12/31/9999
- Name Section:**
  - Title: (dropdown menu)
  - Last name: POTTER (highlighted with a blue box and callout 1)
  - First name: GRACIE (highlighted with a blue box and callout 2)
  - Middle name: (text input)
  - Nickname: (text input)
  - Suffix: (dropdown menu)
  - Name: (text input)
- HR data Section:**
  - SSN: 437765431 (highlighted with a blue box and callout 3)
  - Date of Birth: 05/24/1976 (highlighted with a blue box and callout 4)
  - Marital Status: Single (dropdown menu, highlighted with a blue box and callout 6)
  - Gender: (radio buttons for Female and Male, with Female selected, highlighted with a blue box and callout 5)
  - Since: (text input)

Callouts 7 and 8 point to the browser's address bar and the 'Save' icon in the toolbar, respectively.

## Section 1–For Personnel Administration Processor

### ACTION: Create Organizational Assignment (0001)

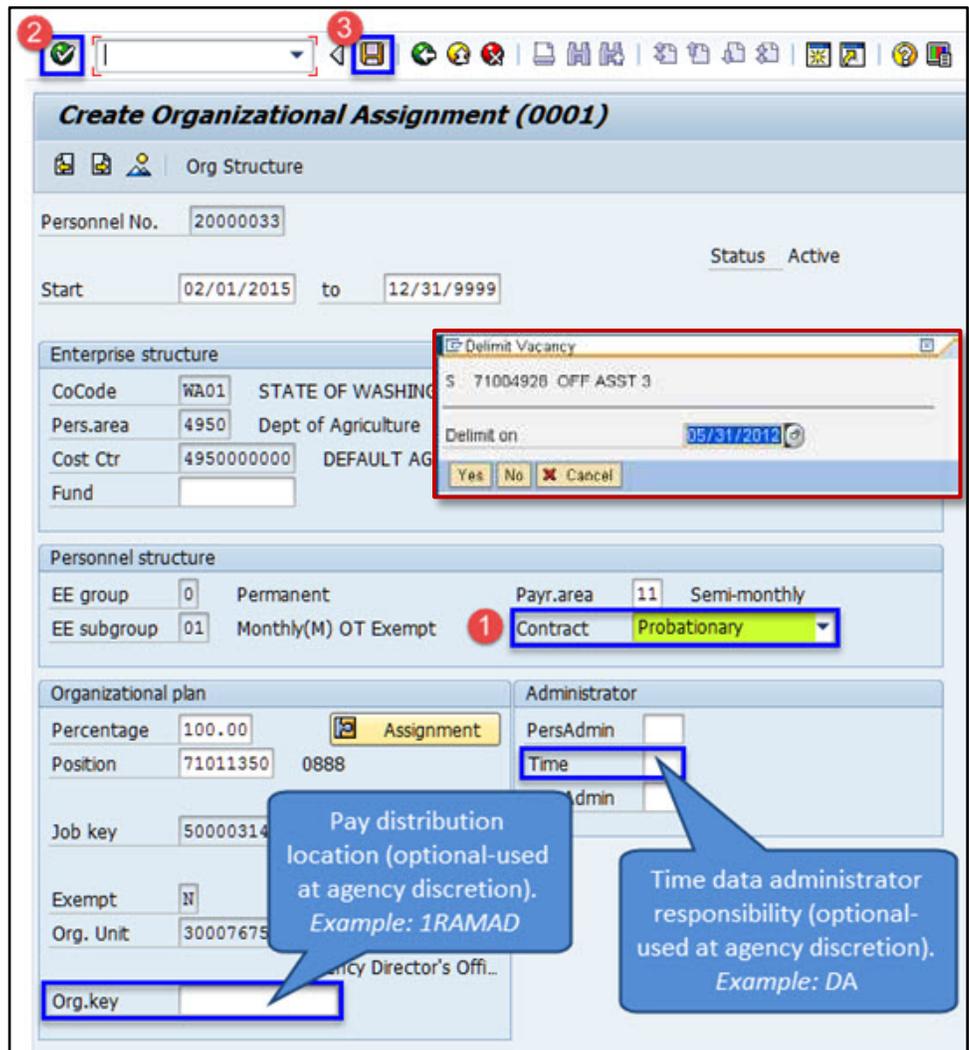
1. In the **Contract** field, select the status of the appointment from the drop-down list.

**Example:** Probationary

2. Click the **Enter** icon.

3. Click **Save**.

If the *Delimit Vacancy* screen appears, select the appropriate option for your agency's position. Then click **Yes** to delimit the Vacancy. *This screen will appear **only** if there's a vacancy that will be delimited by the new hire.*



**Create Organizational Assignment (0001)**

Org Structure

Personnel No. 20000033 Status Active

Start 02/01/2015 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHING  
 Pers.area 4950 Dept of Agriculture  
 Cost Ctr 4950000000 DEFAULT AG  
 Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly  
 EE subgroup 01 Monthly(M) OT Exempt **1** Contract Probationary

Organizational plan

Percentage 100.00 Assignment  
 Position 71011350 0888  
 Job key 50000314  
 Exempt N  
 Org. Unit 30007675  
 Org.key

Administrator

PersAdmin  
 Time  
 Admin

Delimit Vacancy

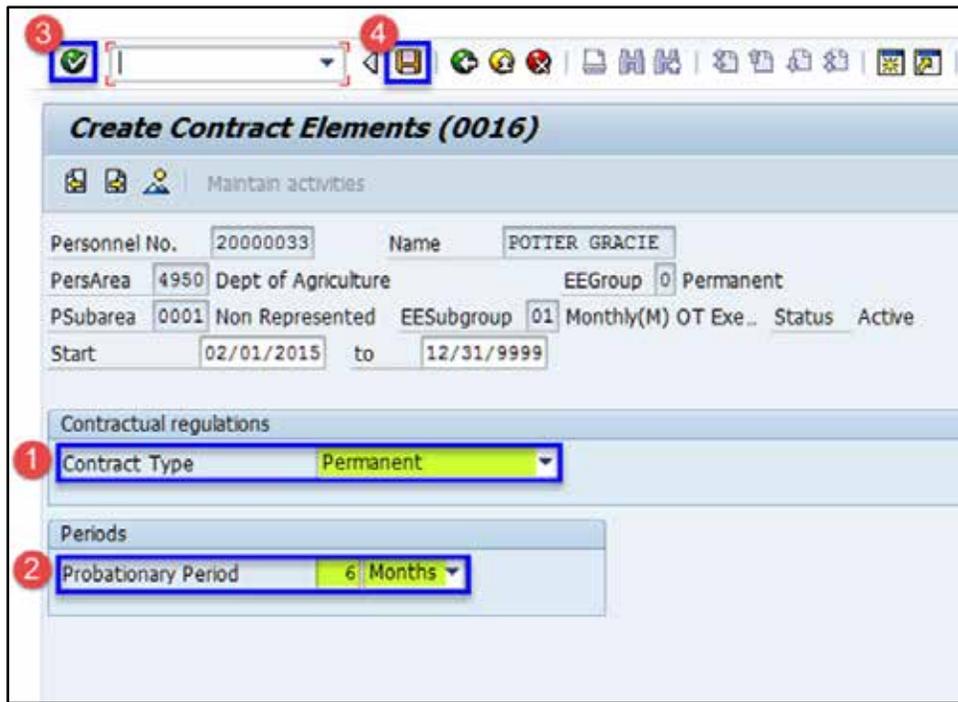
S 71004928 OFF ASST 3  
 Delimit on: 05/31/2012  
 Yes No Cancel

Pay distribution location (optional-used at agency discretion).  
 Example: 1RAMAD

Time data administrator responsibility (optional-used at agency discretion).  
 Example: DA

*ACTION: Create Contract Elements (0016)*

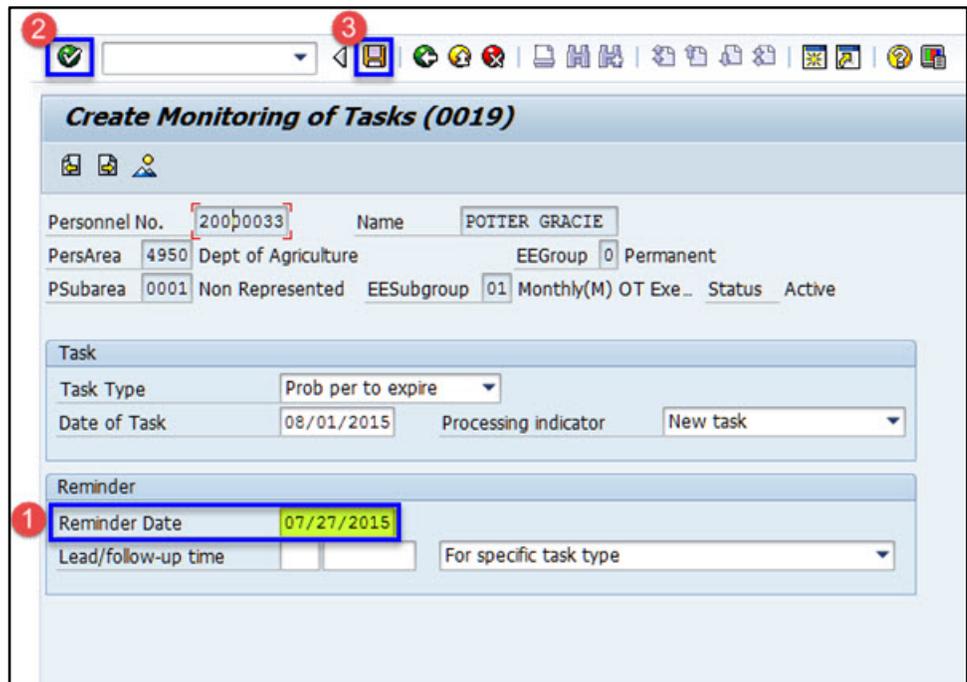
- 1. From the **Contract Type** drop-down list, select the correct status.
- 2. From the drop-down list, choose the correct length of the employee’s **Probationary Period**. *(Optional)*
- 3. Click the **Enter** icon.
- 4. Click **Save**.



**Section 1–For Personnel Administration Processor**

*ACTION: Create Monitoring of Tasks (0019)*

1. Enter the desired **Reminder Date** for the **Task Type**. (*Optional*)
2. Click the **Enter** icon.
3. Click **Save**.



**Create Monitoring of Tasks (0019)**

Personnel No.  Name

PersArea  Dept of Agriculture EEGroup  Permanent

PSubarea  Non Represented EESubgroup  Monthly(M) OT Exe... Status

**Task**

Task Type

Date of Task  Processing indicator

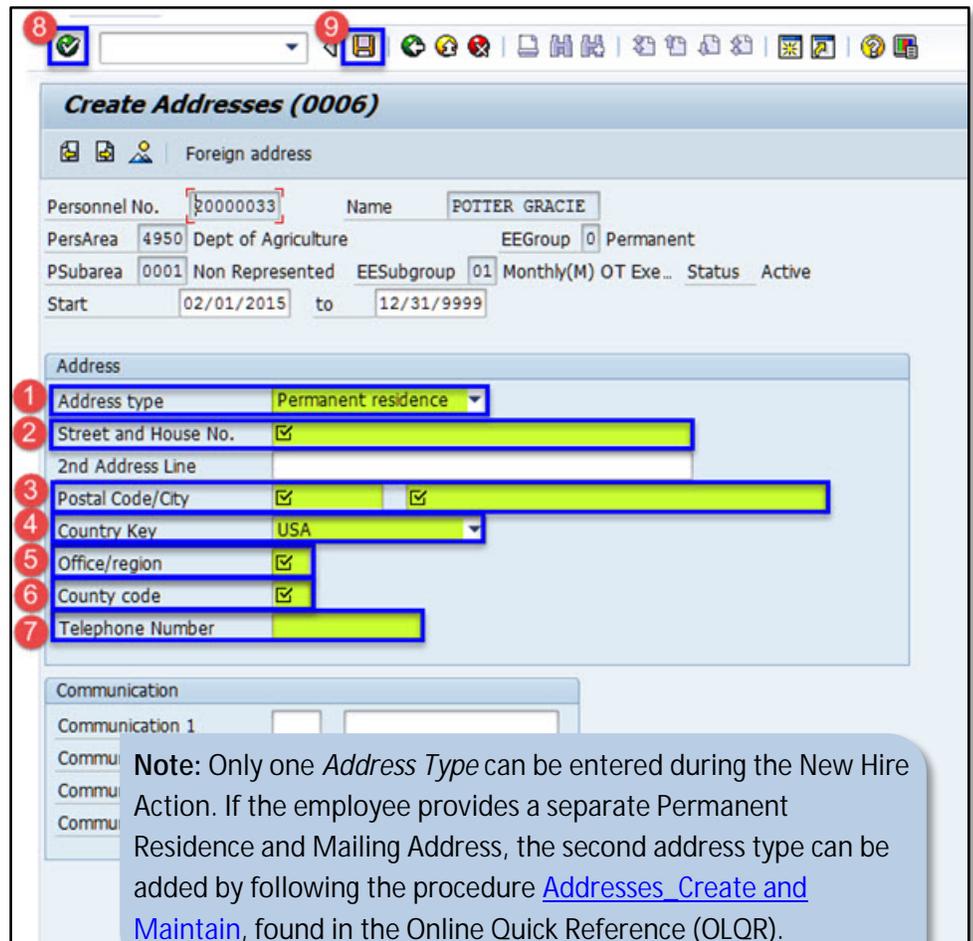
**Reminder**

Reminder Date

Lead/follow-up time   For specific task type

*ACTION: Create Addresses (0006)*

1. From the drop-down list, select the correct **Address Type**.
2. Enter employee’s street address.
3. Enter the employee’s 5 or 9 digit **Zip/Postal Code** and **City**.
4. Enter the correct **Country Key**.
5. In the **Office/region box**, enter the employee’s state.
6. Click the match code button to select the correct **County Code**, then click the **Enter** button.
7. Enter the employee’s **Telephone Number**, including area code. *(Optional)*
8. Click the **Enter** icon.
9. Click **Save**.



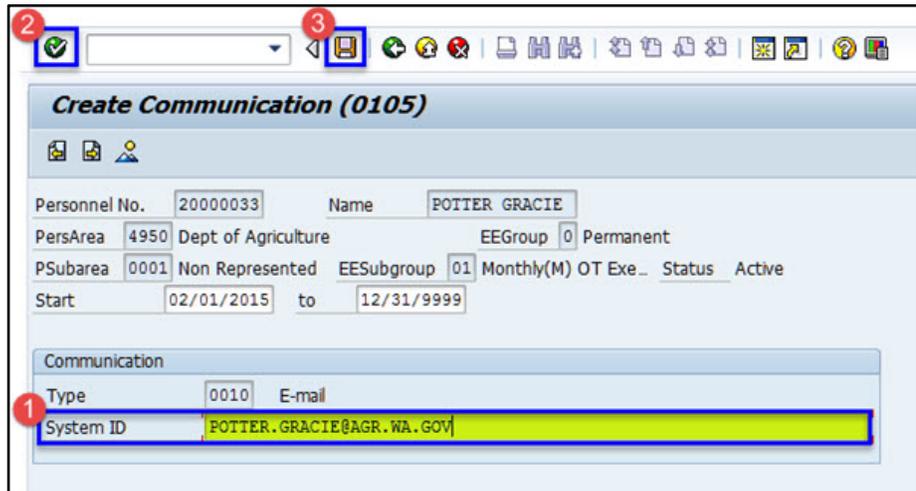
## Section 1–For Personnel Administration Processor

### *ACTION: Create Communication (0105)*

1. In the **System ID** field, enter the employee's email address.
2. Click the **Enter** icon.
3. Click **Save**.

**NOTE:** If you don't know the email address at the time of the new hire, click the *Next Record* button to move to the next infotype.

When you obtain it, enter the email address using transaction code PA30.



**Create Communication (0105)**

Personnel No. 20000033 Name POTTER GRACIE

PersArea 4950 Dept of Agriculture EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 02/01/2015 to 12/31/9999

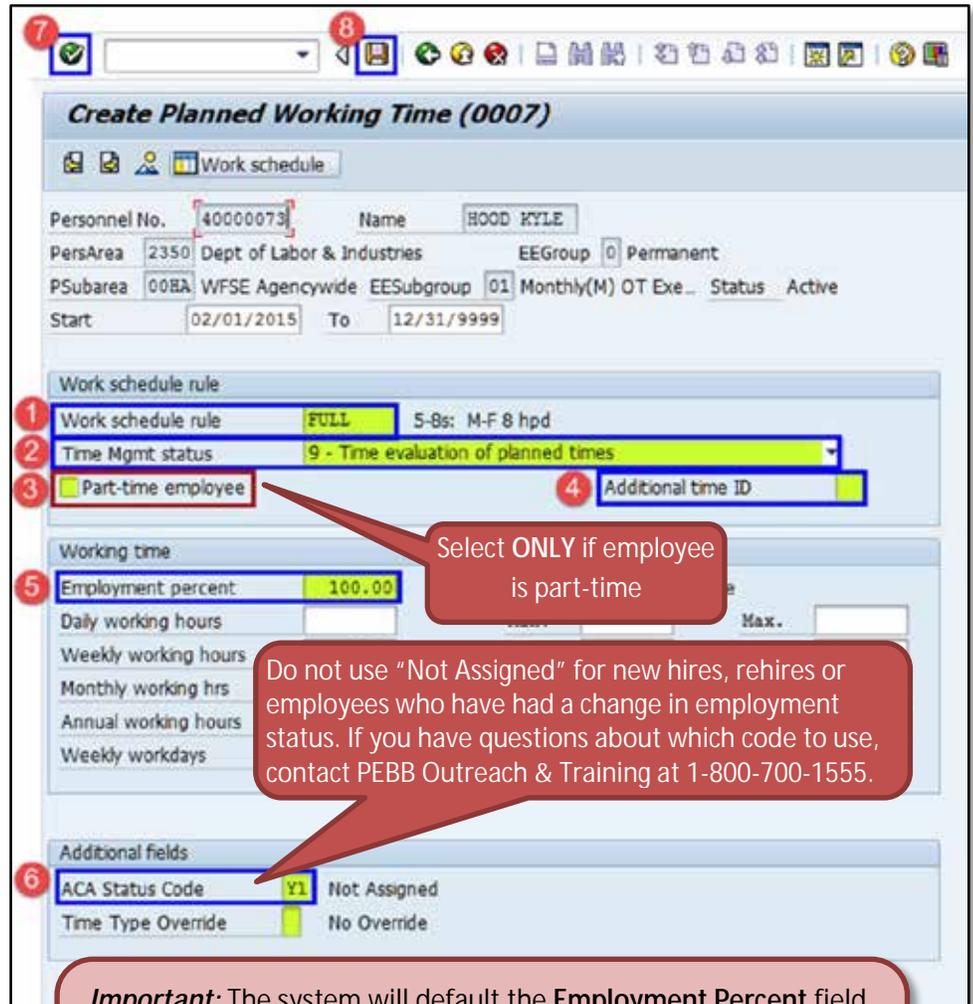
**Communication**

Type 0010 E-mail

System ID POTTER.GRACIE@AGR.WA.GOV

**ACTION: Create Planned Working Time (0007)**

1. The **Work Schedule Rule** will default to *Full*.  
If the employee is not on a *FULL 5-8s M-F 8hpd* work schedule, click inside the **Work Schedule Rule** field and select the appropriate match code from the list.
2. From the **Time Mgmt status** drop-down list, select the correct part of the work schedule that the employee is assigned to and signifies how hours are calculated. (see box #1)
3. Select the checkbox **only** if employee is part-time.
4. Enter how the employee will accrue leave. (see box #2)
5. In the **Employment percent** field, enter the percentage of time the employee will work.
6. In the **ACA Status Code** field, select the average hours per month for the employee from the match code list.
7. Click the **Enter** icon.
8. Click **Save**.



The screenshot shows the 'Create Planned Working Time (0007)' form. It includes fields for Personnel No. (40000073), Name (HOOD KYLE), PersArea (2350), Dept of Labor & Industries, EEGroup (0), Permanent, PSubarea (00BA), WFSE Agencywide, EESubgroup (01), Monthly(M), OT Exe., Status (Active), Start (02/01/2015), and To (12/31/9999). The 'Work schedule rule' section has 'FULL' selected for the rule and '9 - Time evaluation of planned times' for the Time Mgmt status. The 'Working time' section has '100.00' for Employment percent. The 'Additional fields' section has 'Y1' for ACA Status Code and 'No Override' for Time Type Override. Callouts 1-8 point to these fields. A callout box explains that 'Part-time employee' should only be selected if the employee is part-time. Another callout box states: 'Do not use "Not Assigned" for new hires, rehires or employees who have had a change in employment status. If you have questions about which code to use, contact PEBB Outreach & Training at 1-800-700-1555.'

**Important:** The system will default the **Employment Percent** field to 100. If the employee is going to work less than 100%, you **must** enter the percent. If there are changes to this field, the same percent value **must** be entered in the *Basic Pay (0008) Cap. Util.lvl* field.

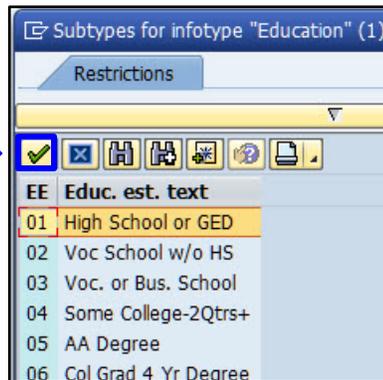
**BOX #1–Time Mgmt status**  
 Select:  
 1-Time Evaluation of actual times for **Hourly** employees  
 9-Time Evaluation of planned times for **Monthly** employees

**BOX #2–Leave Accrual Types**  
 Enter:  
 00 for full **normal** leave accrual (default if left blank)  
 01 for **NO** leave accrual  
 02 for **sick** leave accrual only

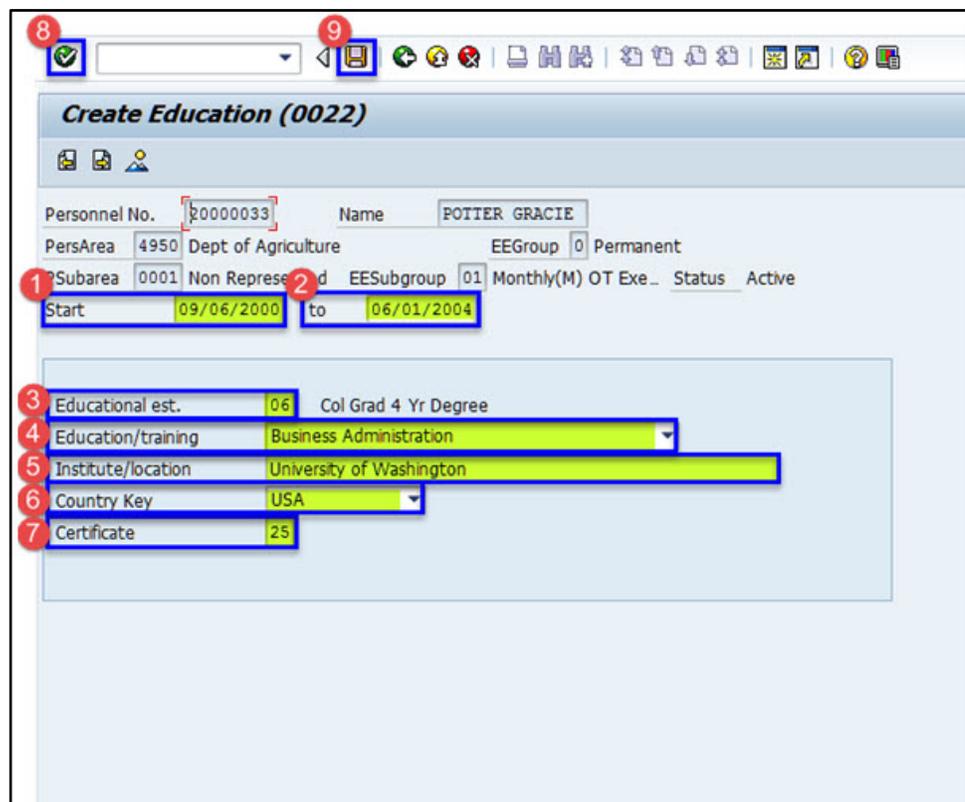
## Section 1–For Personnel Administration Processor

### ACTION: Create Education (0022)

To access the **Create Education** screen, first select the appropriate education level, then click the **Enter** button.



1. In the **Start** field, enter the date the record begins.
2. In the **to** field, enter the end date of the record, transaction or search.
3. Click inside the **Educational est.** field to access and select the correct match code.
4. In the **Education/training** field, select the correct type of education from the drop-down list.
5. In the **Institute/location** field, enter the name of the educational institution attended.
6. In the **Country Key** field, choose *USA*.
7. Click inside the **Certificate** field to access and select the correct match code.
8. Click the **Enter** icon.
9. Click **Save**.



**Create Education (0022)**

Personnel No. 200000333 Name POTTER GRACIE  
 PersArea 4950 Dept of Agriculture EEGroup 0 Permanent  
 Subarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active  
 Start 09/06/2000 to 06/01/2004

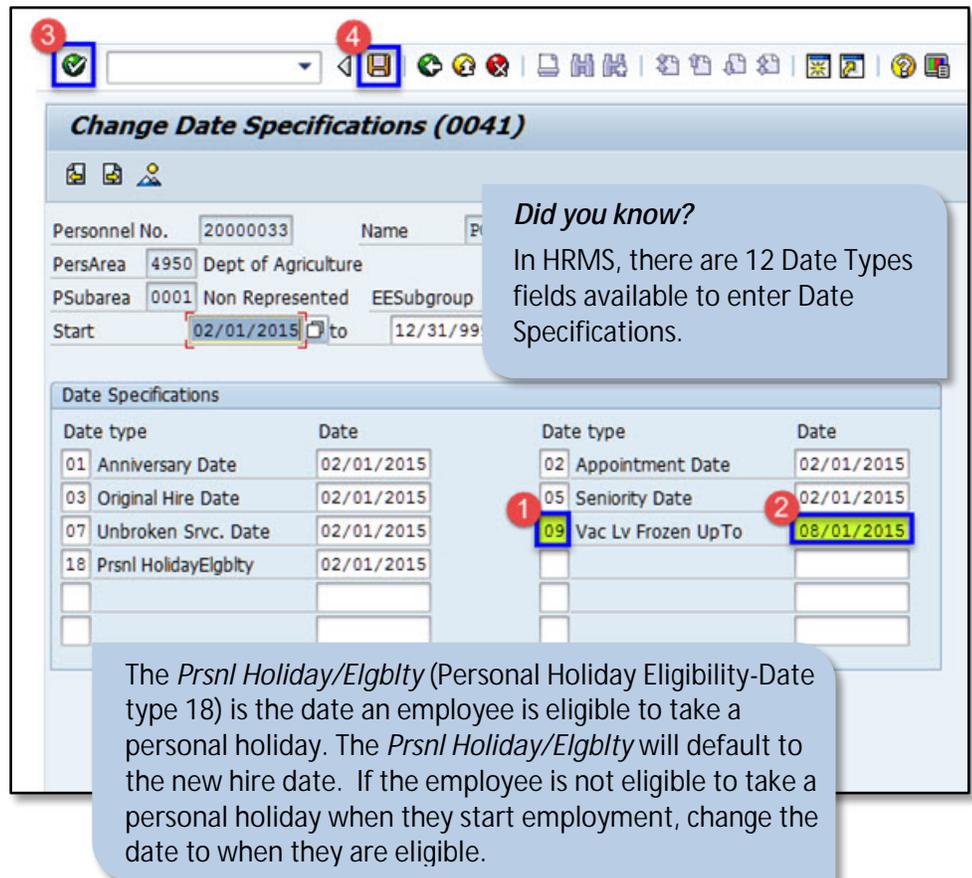
3 Educational est. 06 Col Grad 4 Yr Degree  
 4 Education/training Business Administration  
 5 Institute/location University of Washington  
 6 Country Key USA  
 7 Certificate 25

## Section 1–For Personnel Administration Processor

### ACTION: Change Date Specifications (0041)

Use this screen if you would like to indicate the date the employee will be eligible to take vacation (annual) leave. (Optional)

1. Click inside an available **Date type** field. The match code list will appear. Select *09 Vac Lv Frozen Up To*.
2. In the **Date field**, enter the date the employee is eligible to take vacation leave.
3. Click the **Enter** icon.
4. Click **Save**.



**Change Date Specifications (0041)**

Personnel No. 20000033 Name P  
 PersArea 4950 Dept of Agriculture  
 PSubarea 0001 Non Represented EESubgroup  
 Start 02/01/2015 to 12/31/99

**Did you know?**  
 In HRMS, there are 12 Date Types fields available to enter Date Specifications.

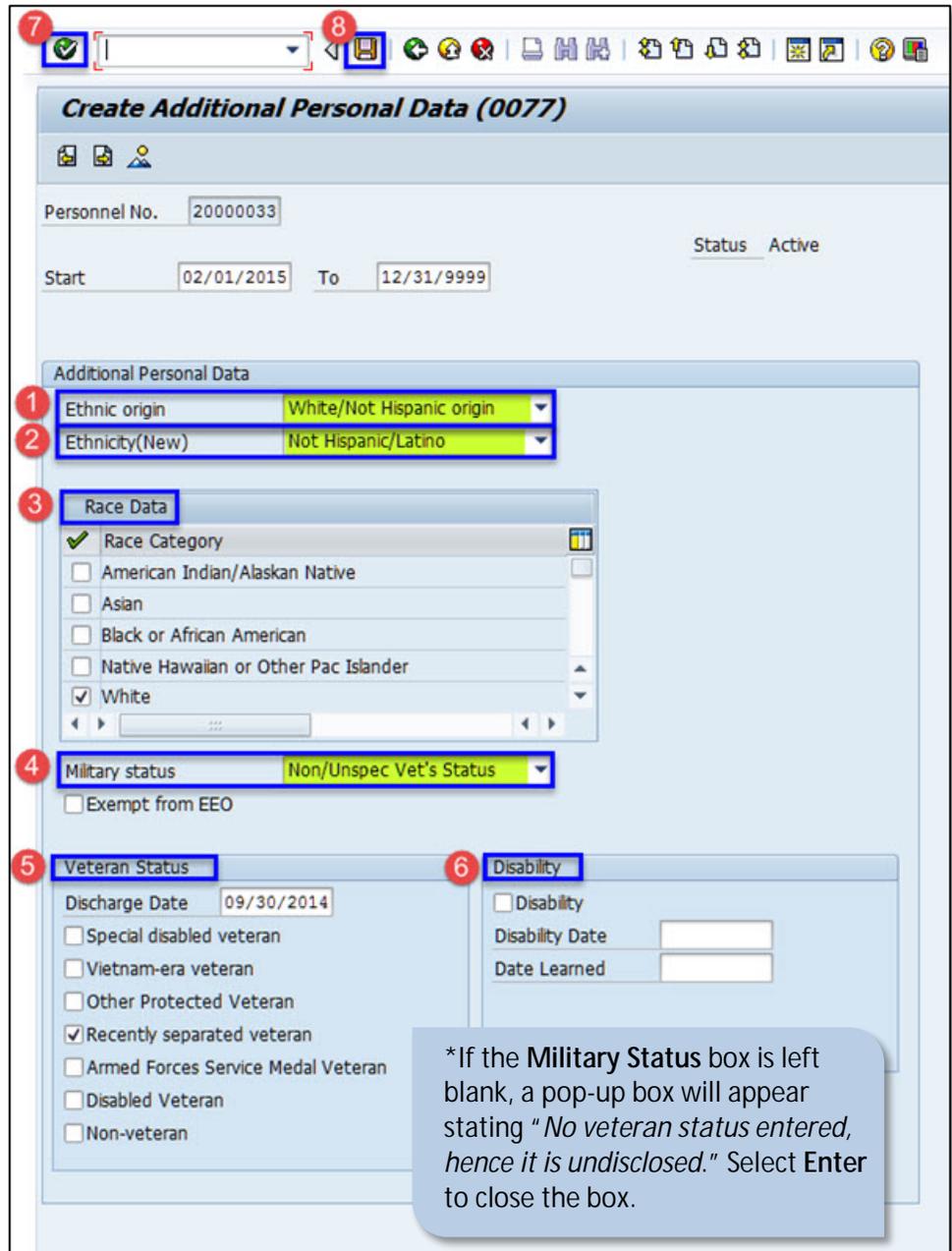
| Date type               | Date       | Date type             | Date       |
|-------------------------|------------|-----------------------|------------|
| 01 Anniversary Date     | 02/01/2015 | 02 Appointment Date   | 02/01/2015 |
| 03 Original Hire Date   | 02/01/2015 | 05 Seniority Date     | 02/01/2015 |
| 07 Unbroken Svc. Date   | 02/01/2015 | 09 Vac Lv Frozen UpTo | 08/01/2015 |
| 18 Prsnl HolidayElgblty | 02/01/2015 |                       |            |

The *Prsnl Holiday/Elgblty* (Personal Holiday Eligibility-Date type 18) is the date an employee is eligible to take a personal holiday. The *Prsnl Holiday/Elgblty* will default to the new hire date. If the employee is not eligible to take a personal holiday when they start employment, change the date to when they are eligible.

## Section 1–For Personnel Administration Processor

### ACTION: Create Additional Personal Data (0077)

1. Choose the employee's **Ethnic Origin** from the drop-down list.  
(Optional)
2. Choose the employee's **Ethnicity (New)** from the drop-down list.  
(Optional)
3. Select the correct box for **Race Data**.
4. Choose the branch of the military in which the employee served from the **Military Status** drop-down list. If none, select *Non/Unspec Vet's Status* or leave blank.\*  
(Optional)
5. Complete **Veteran Status** section, if applicable.  
*Non-Veteran* is the default **Veteran Status**. If another **Veteran Status** is selected, you must **uncheck** the *Non-Veteran* status box.
6. Complete **Disability** section, if applicable.
7. Click the **Enter** icon.
8. Click **Save**.



**Create Additional Personal Data (0077)**

Personnel No. 20000033      Status Active

Start 02/01/2015      To 12/31/9999

**Additional Personal Data**

1 Ethnic origin White/Not Hispanic origin

2 Ethnicity(New) Not Hispanic/Latno

3 **Race Data**

Race Category

American Indian/Alaskan Native

Asian

Black or African American

Native Hawaiian or Other Pac Islander

White

4 **Military status** Non/Unspec Vet's Status

Exempt from EEO

5 **Veteran Status**

Discharge Date 09/30/2014

Special disabled veteran

Vietnam-era veteran

Other Protected Veteran

Recently separated veteran

Armed Forces Service Medal Veteran

Disabled Veteran

Non-veteran

6 **Disability**

Disability

Disability Date

Date Learned

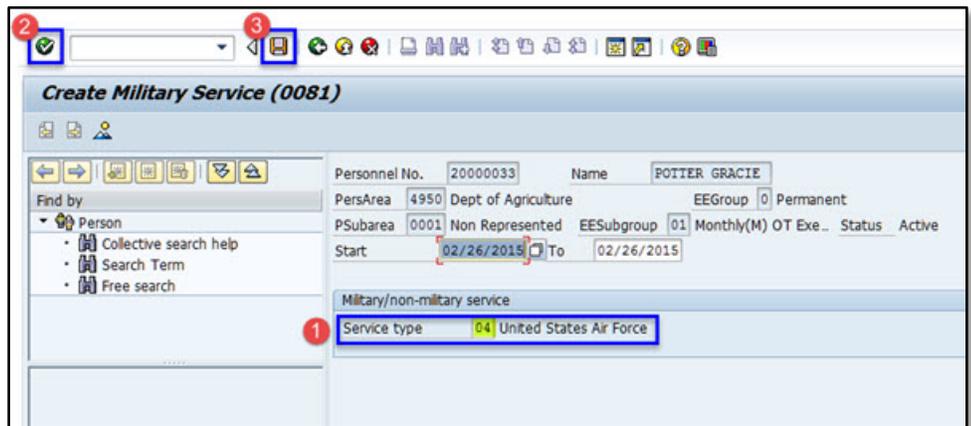
\*If the **Military Status** box is left blank, a pop-up box will appear stating "No veteran status entered, hence it is undisclosed." Select **Enter** to close the box.

## Section 1–For Personnel Administration Processor

### *ACTION: Create Military Service (0081)*

This infotype will appear only if a Military Status was chosen on the *Additional Personal Data* infotype.

1. Click on the match code to display all Service types. Select the correct **Service type**.
2. Click the **Enter** icon.
3. Click **Save**.



**Create Military Service (0081)**

Personnel No. 20000033 Name POTTER GRACIE

PersArea 4950 Dept of Agriculture EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 02/26/2015 To 02/26/2015

Military/non-military service

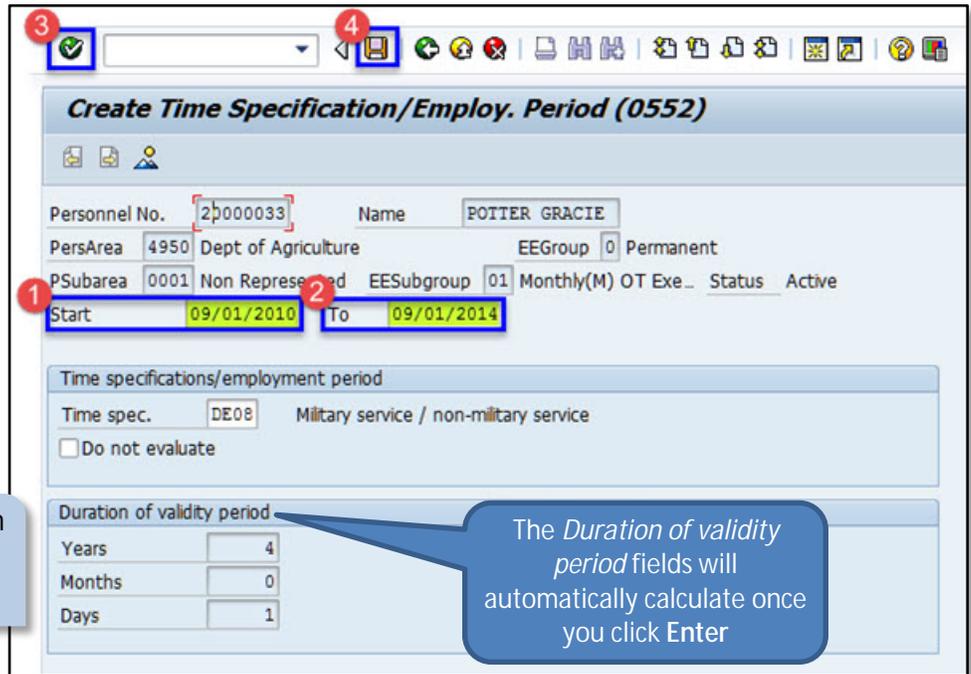
Service type 04 United States Air Force

## Section 1–For Personnel Administration Processor

**ACTION: Create Time Specification/Employ. Period (0552)**

1. In the **Start** field, enter the start date of the employee's military service\*.
2. In the **To** field, enter the end date of the employee's military service\*.
3. Click the **Enter** icon.
4. Click **Save**.

\*These should match what is on the employee's DD214 paperwork.



**Create Time Specification/Employ. Period (0552)**

Personnel No. 20000033 Name POTTER GRACIE  
 PersArea 4950 Dept of Agriculture EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 09/01/2010 To 09/01/2014

Time specifications/employment period  
 Time spec. DE08 Military service / non-military service  
 Do not evaluate

Duration of validity period  
 Years 4  
 Months 0  
 Days 1

The Duration of validity period fields will automatically calculate once you click Enter

## Section 1–For Personnel Administration Processor

### ACTION: Create Basic Pay (0008)

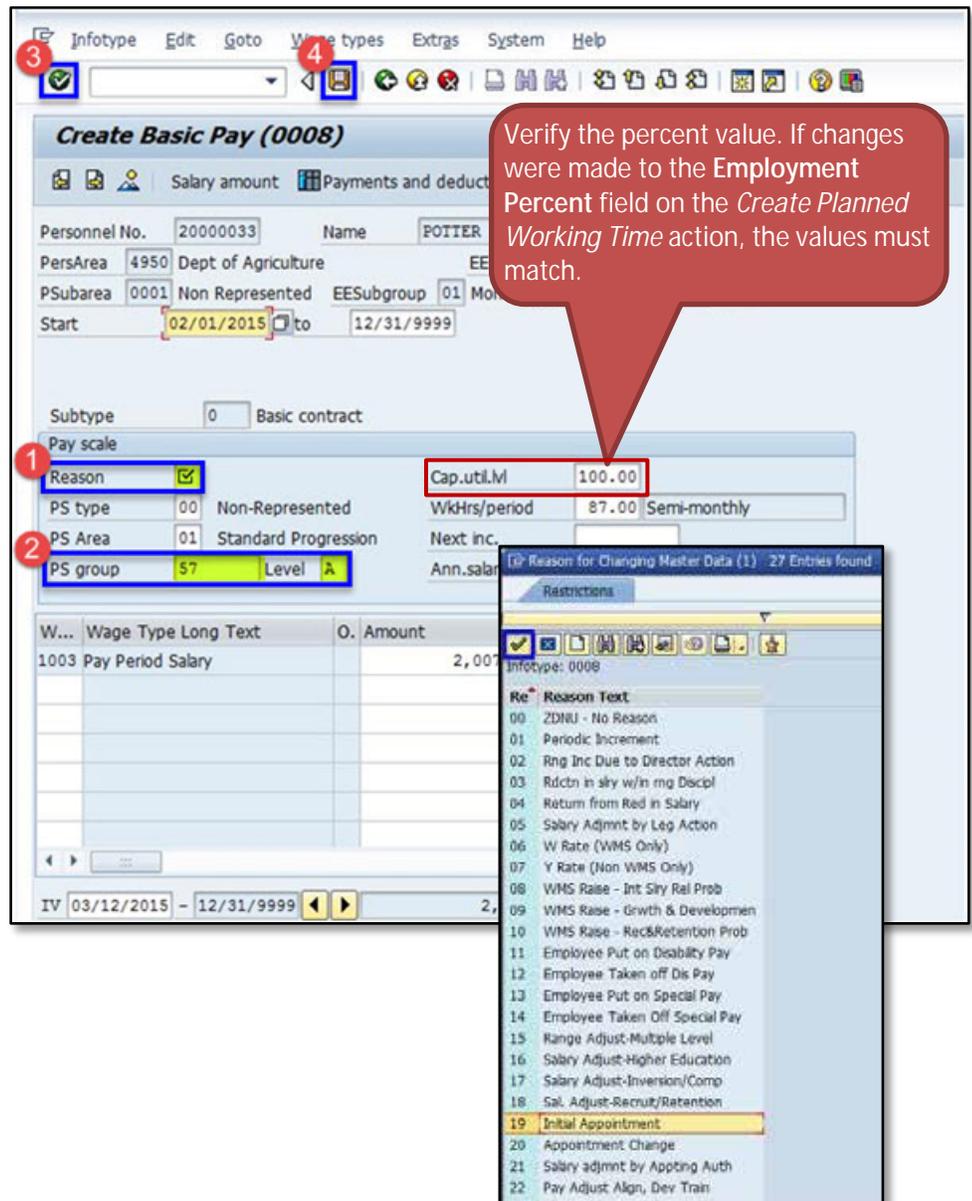
1. In the **Reason** field, click on the match code to open the *Reason for Changing Master Data* screen. Select the correct reason and click the **Enter** button.

*Example: 19–Initial Appointment*

2. Verify that the **PS group** and **Level** values are correct.

By default, the system will display a level of **A**. If the employee is hired at a higher rate, enter the correct level.

3. Click the **Enter** icon.
4. Click **Save**.



**NOTE:** This marks the end of the New Hire action for the *Personnel Administration Processor*. After saving, click **Exit** and transfer the New Hire Information Packet to the *Payroll Processor* who will continue the action.

## Section 2–For Payroll Processor

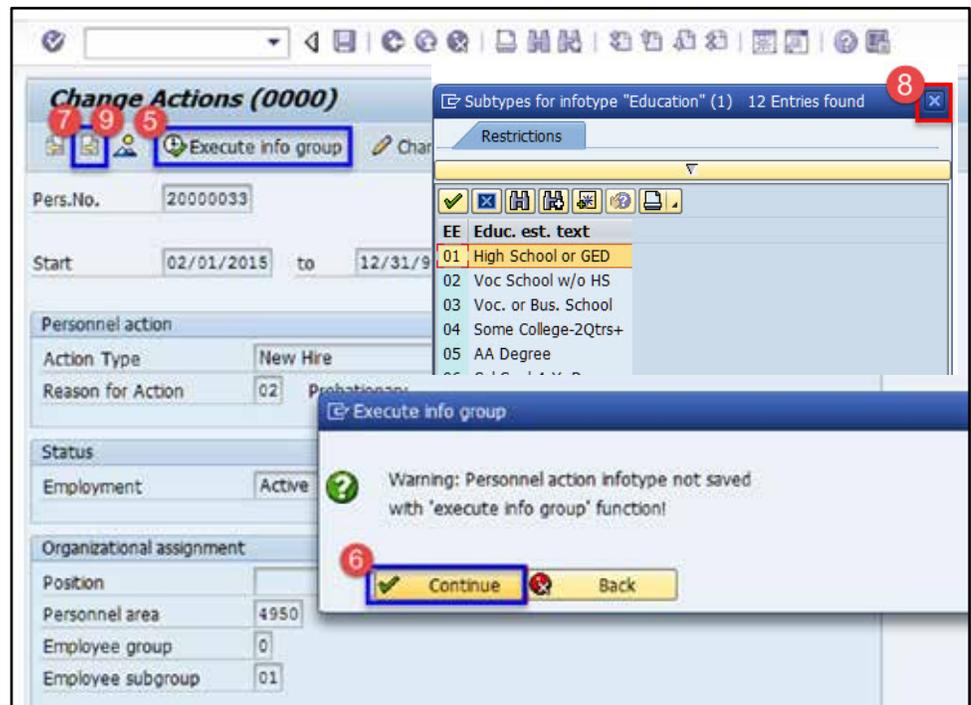
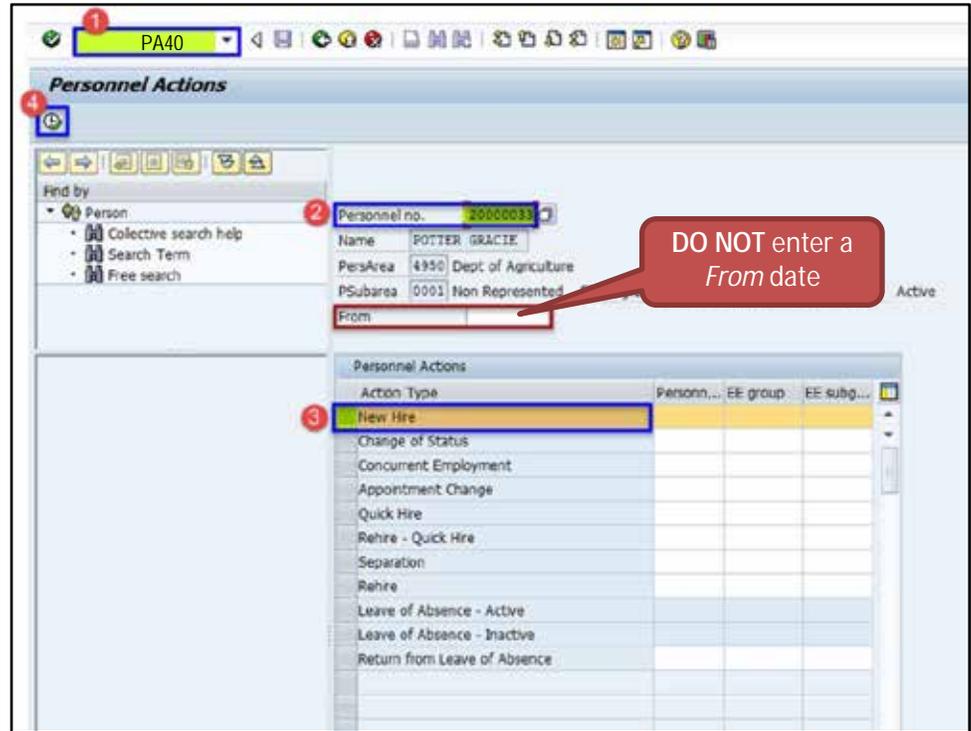
### **IMPORTANT**

The actions in this section are completed by the **Payroll Processor**. If you are the **Benefits Processor**, skip to *Section 3–For Benefits Processor*.

1. Start by entering Transaction Code **PA40** in the Command Field and press the **Enter** key.
2. Enter the employee's **Personnel Number**.
3. Select the box to the left of *New Hire*.
4. Click **Execute**.

The *Change Actions* screen will appear.

5. Click on **Execute info group**. The *Execute info group* warning box will appear.
6. Click **Continue**.
7. Click on the **Next Record** icon until the *Subtypes for infotype Education* window appears.
8. **Close** that window.
9. Continue clicking **Next Record** until you reach *Create Bank Details (0009)*.



**ACTION: Create Bank Details (0009)**

If the employee has elected direct deposit (ACH) for their pay, continue with steps 1-7. If they elect to receive a warrant, skip to step 9.

1. In the **Bank Key** field, click on the matchcode to open the *Find Bank* screen.
2. Enter a portion of the bank name followed by an asterisk in the **Bank name** field of the *Find bank* screen.
3. Click the **Enter** button.
4. The *Bank Data* screen will appear, listing available banks. Select the correct bank.
5. Click the **Enter** button.
6. Enter the employee's bank account number in the **Bank Account** field.
7. In the *Bank control key* field, enter the type of bank account. Enter **01** for Checking or **02** for Savings. **Do not leave this field blank!**
8. Enter the **Payment method**\*. →
9. Click the **Enter** icon.
10. Click **Save**.

| Country | Bank Key  | Name of bank             | House number and street | City             | Bank Branch | SWIFT/BIC | Bank number |
|---------|-----------|--------------------------|-------------------------|------------------|-------------|-----------|-------------|
| US      | 011500858 | WASHINGTON TRUST COMPANY | 2 CROSSWIND ROAD        | 02891 WESTERLY   |             |           | 011500858   |
| US      | 054001602 | WASHINGTON FIRST BANK    | 1146 19TH STREET NW     | 20036 WASHINGTON |             |           | 054001602   |
| US      | 054001699 | WASHINGTON FIRST BANK    | 1146 19TH STREET, NW    | 20036 WASHINGTON |             |           | 054001699   |
| US      | 065202461 | WASHINGTON STATE BANK    | 103 N. MAIN ST          | 70589 WASHINGTON |             |           | 065202461   |
| US      | 065204391 | WASHINGTON STATE BANK    | 103 N. MAIN ST          | 70589 WASHINGTON |             |           | 065204391   |
| US      | 071122276 | WASHINGTON STATE BANK    | 1110 PEORIA ST          | 61571 WASHINGTON |             |           | 071122276   |
| US      | 073902216 | WASHINGTON STATE BANK    | 121-125 SOUTH MARION    | 52353 WASHINGTON |             |           | 073902216   |
| US      | 104901856 | WASHINGTON COUNTY BANK   | PO BOX 248              | 68008 BLAIR      |             |           | 104901856   |
| US      | 104913161 | WASHINGTON COUNTY BANK   | BOX 248                 | 68008 BLAIR      |             |           | 104913161   |
| US      | 104914089 | WASHINGTON COUNTY BANK   | PO BOX 248              | 68008 BLAIR      |             |           | 104914089   |
| US      | 123006868 | WASHINGTON TRUST BANK    | 176 SOUTH POST STREET   | 99201 SPOKANE    |             |           | 123006868   |
| US      | 123103554 | WASHINGTON TRUST BANK    | 176 S POST ST           | 99201 SPOKANE    |             |           | 123103554   |
| US      | 125100089 | WASHINGTON TRUST BANK    | 176 S POST ST           | 99201 SPOKANE    |             |           | 125100089   |
| US      | 125108214 | WASHINGTON FEDERAL       | 425 PIKE ST             | 99201 SPOKANE    |             |           | 125108214   |
| US      | 125108670 | WASHINGTON BUSINESS BANK | 2607 N. SPOKANE         | 99201 SPOKANE    |             |           | 125108670   |
| US      | 125108722 | WASHINGTON TRUST BANK    | 176 S POST ST           | 99201 SPOKANE    |             |           | 125108722   |

**\*Payment methods:**  
 C=Warrant  
 D=Bank Transfer (ACH/direct deposit)

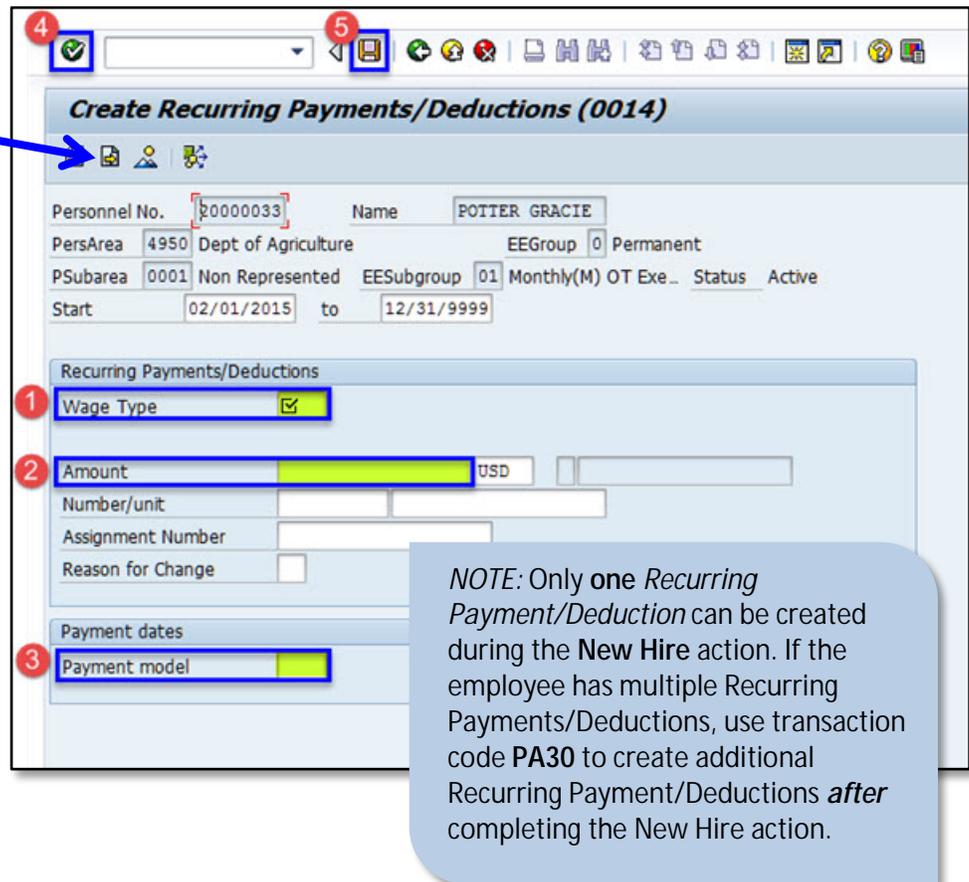
**You must save the Bank Details infotype** to accept the default of Warrant. If you do not save this infotype, the employee will red line on payroll reports and will not process through payroll until the Bank Details infotype is created and saved.

## Section 2–For Payroll Processor

### ACTION: Create Recurring Payments/Deductions (0014)

If the employee has recurring payments/deductions, follow steps 1-5. If not, click **Next record** to skip to the **Create Unemployment State** infotype.

1. In the **Wage Type** field, click on the match code and select the correct type of payment/deduction.  
*Example: 2661–Charity*
2. Enter the **Amount** of the payment/deduction.
3. In the **Payment Model** field, enter the payment schedule for the payment/deduction including the pay period and the amount.  
*Example: WA04 Every Pay Period–Full Amount*
4. Click the **Enter** icon.
5. Click **Save**.



**Create Recurring Payments/Deductions (0014)**

Personnel No. 20000033 Name POTTER GRACIE  
 PersArea 4950 Dept of Agriculture EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active  
 Start 02/01/2015 to 12/31/9999

Recurring Payments/Deductions

1 Wage Type

2 Amount  USD

Number/unit   
 Assignment Number   
 Reason for Change

Payment dates

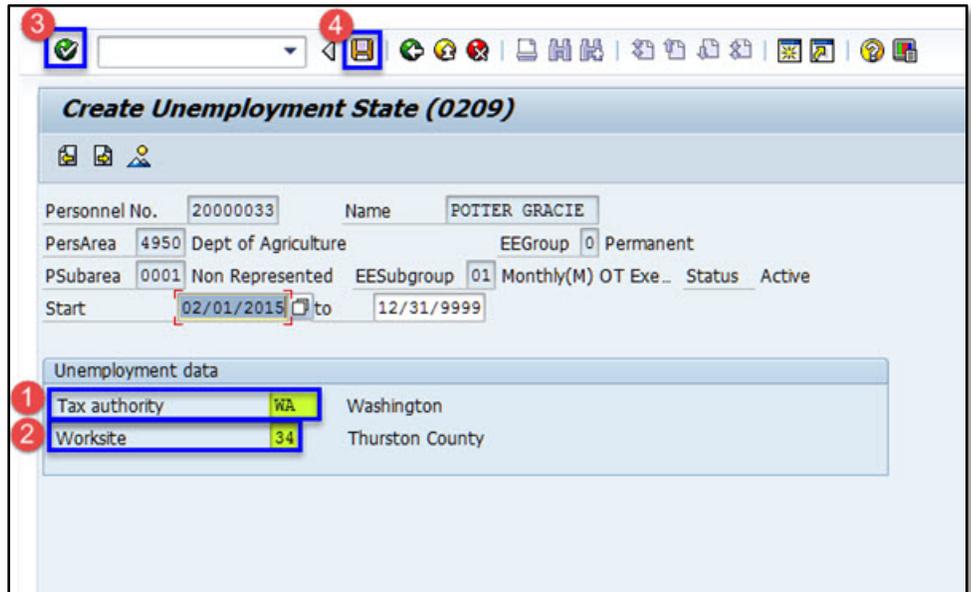
3 Payment model

**NOTE:** Only one Recurring Payment/Deduction can be created during the New Hire action. If the employee has multiple Recurring Payments/Deductions, use transaction code PA30 to create additional Recurring Payment/Deductions *after* completing the New Hire action.

## Section 2–For Payroll Processor

**ACTION: Create Unemployment State (0209)**

1. In the **Tax Authority** field, type **WA**.
2. If you know the county code for the **Worksite** field, enter it. If not, open the match code list, select the correct county and click the **Enter** button.
3. Click the **Enter** icon.
4. Click **Save**.



The screenshot shows a web-based form titled "Create Unemployment State (0209)". The form contains the following fields and values:

- Personnel No.: 20000033
- Name: POTTER GRACIE
- PersArea: 4950 Dept of Agriculture
- EEGroup: 0 Permanent
- PSubarea: 0001 Non Represented
- EESubgroup: 01 Monthly(M) OT Exe...
- Status: Active
- Start: 02/01/2015 to 12/31/9999

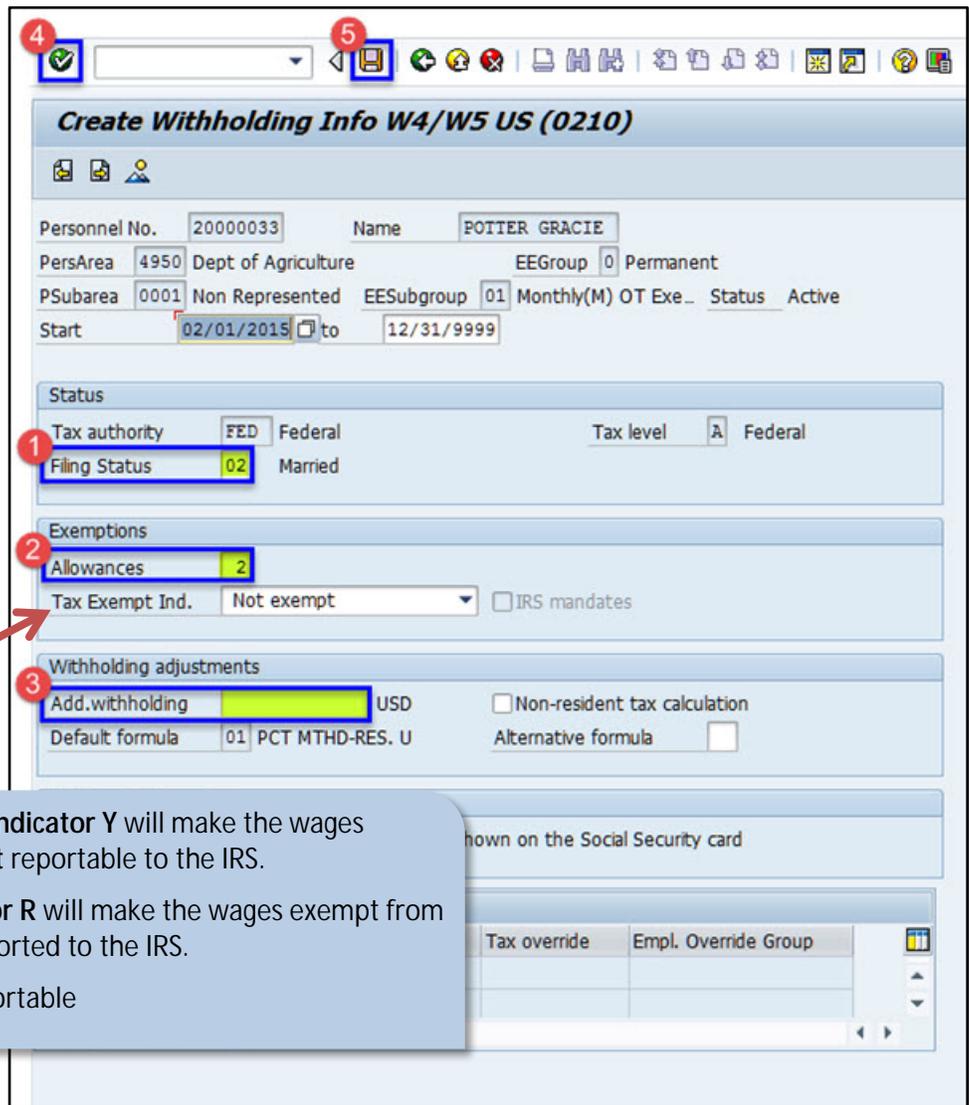
Below the main form is a section titled "Unemployment data" with two rows:

| Field         | Value | Description     |
|---------------|-------|-----------------|
| Tax authority | WA    | Washington      |
| Worksite      | 34    | Thurston County |

Numbered callouts in the image indicate: 1. Tax authority field, 2. Worksite field, 3. Save button (top left), and 4. Enter button (top right).

**ACTION: Create Withholding Info W4/W5 US (0210)**

1. In the **Filing Status** field, enter the status selected by the employee for Federal tax withholding.
2. Enter the number of dependents claimed in the **Allowances** field.
3. If the employee wishes to have additional withholding deducted, enter that amount in the **Add. withholding** field. *(Optional)*
4. Click the **Enter** icon.
5. Click **Save**.



**Create Withholding Info W4/W5 US (0210)**

Personnel No. 20000033 Name POTIER GRACIE  
 PersArea 4950 Dept of Agriculture EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active  
 Start 02/01/2015 to 12/31/9999

**Status**  
 Tax authority FED Federal Tax level A Federal  
 Filing Status 02 Married

**Exemptions**  
 Allowances 2  
 Tax Exempt Ind. Not exempt  IRS mandates

**Withholding adjustments**  
 Add.withholding USD  Non-resident tax calculation  
 Default formula 01 PCT MTHD-RES. U Alternative formula

shown on the Social Security card

| Tax override | Empl. Override Group |
|--------------|----------------------|
|              |                      |

**NOTE:** Using Tax Exemption indicator Y will make the wages exempt from taxation and **not** reportable to the IRS.

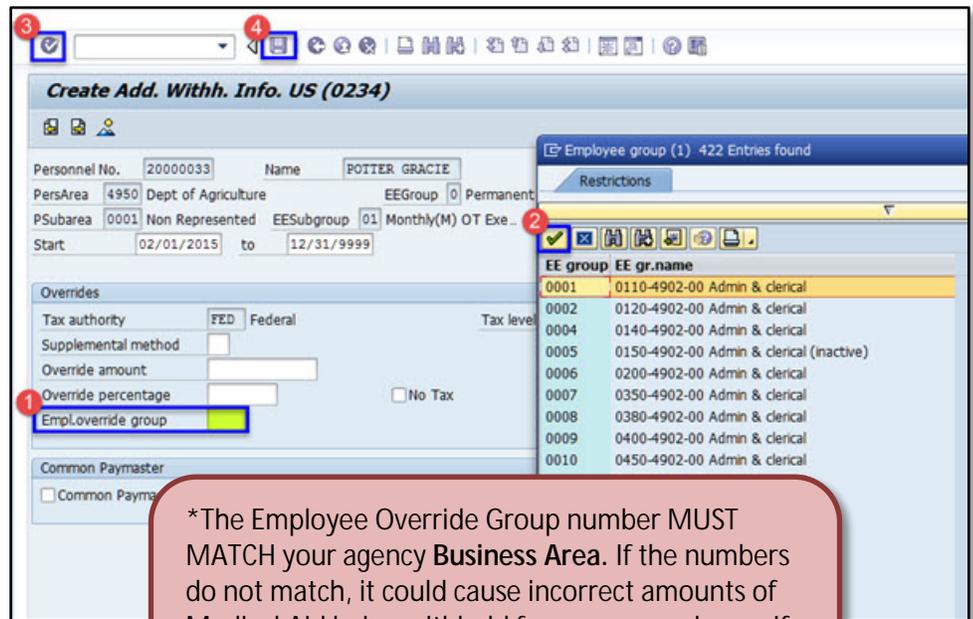
Using Tax Exemption indicator R will make the wages exempt from taxation and earnings **are** reported to the IRS.

**Example:** Y–Exempt, not reportable

## Section 2–For Payroll Processor

**ACTION:** Create Add. Withh. Info. Us (0234)

1. From the *Empl. Override group* match code list, select the correct code.\*
2. Click the **Enter** button, to close the match code window.
3. Click the **Enter** icon.
4. Click **Save**.



**Create Add. Withh. Info. US (0234)**

Personnel No. 20000033 Name POTTER GRACIE  
 PersArea 4950 Dept of Agriculture EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe...  
 Start 02/01/2015 to 12/31/9999

**Overrides**

Tax authority FED Federal Tax level  
 Supplemental method  
 Override amount  
 Override percentage  No Tax  
 Empl. Override group

**Common Paymaster**

Common Paymaster

**Employee group (1) 422 Entries found**

| EE group | EE gr.name                               |
|----------|--|
| 0001     | 0110-4902-00 Admin & clerical            |
| 0002     | 0120-4902-00 Admin & clerical            |
| 0004     | 0140-4902-00 Admin & clerical            |
| 0005     | 0150-4902-00 Admin & clerical (inactive) |
| 0006     | 0200-4902-00 Admin & clerical            |
| 0007     | 0350-4902-00 Admin & clerical            |
| 0008     | 0380-4902-00 Admin & clerical            |
| 0009     | 0400-4902-00 Admin & clerical            |
| 0010     | 0450-4902-00 Admin & clerical            |

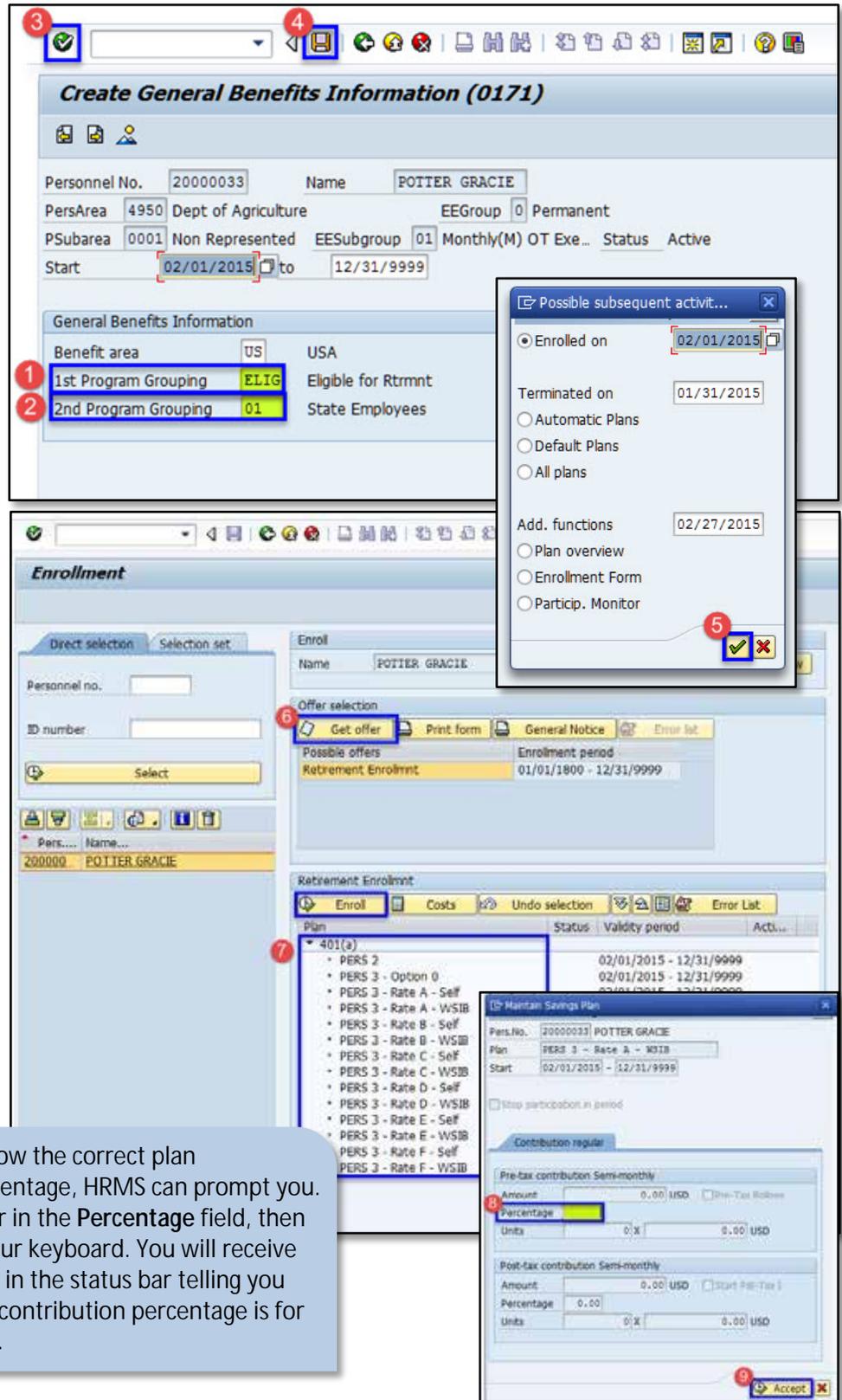
\*The Employee Override Group number MUST MATCH your agency **Business Area**. If the numbers do not match, it could cause incorrect amounts of Medical Aid being withheld from your employee. If unsure of which code to use, contact the Department of Labor & Industries.

**NOTE:** This marks the end of the New Hire action for the *Payroll Processor*. If you are also the *Benefits Processor*, continue with the action. If not, after saving, click **Exit** and transfer the New Hire Information Packet to the *Benefits Processor* who will continue the action.



**ACTION: Create General Benefits Information (0171)**

1. The **1<sup>st</sup> Program Grouping** field will automatically default to **ELIG**.
2. The **2<sup>nd</sup> Program Grouping** field will automatically default from the personnel area.
3. Click the **Enter** icon.
4. Click **Save**.
5. The *Possible subsequent activities* box will appear. Click the **Enter** button to close the box.
6. The *Enrollment* screen will appear. Click **Get Offer**.
7. From the *Plan* list, choose the correct Plan.
8. Enter the correct **Percentage** amount for the retirement deduction.\* **Do not leave the Percentage field blank or HRMS will not take any deductions for retirement.**
9. Click **Accept**.



\*If you do not know the correct plan contribution percentage, HRMS can prompt you. Enter any number in the **Percentage** field, then press **Enter** on your keyboard. You will receive an error message in the status bar telling you what the correct contribution percentage is for the selected plan.

*ACTION: Create General Benefits Information (0171), continued*

10. The *Retirement Enrollment* screen will appear. Click **Enroll**.

11. The *Confirmation of Selected Actions* screen will appear. Click **Enroll**.

12. The *Enrollment completed successfully* screen will appear. Click **Continue** to continue or click **Confirmation** to print confirmation, then **Continue**.

13. You will be taken to the *Enrollment* screen. Click the **Back** button to return to the previous screen.

14. The *Possible subsequent activities* screen will appear. Click **Cancel**. You will be taken back to the *Personnel Actions (PA40)* screen.

***Congratulations, you have hired a new employee into HRMS!***

