Checklist for New Employees

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Use this job aid as a checklist to guide you through the Human Resources, Benefits, Time and Labor, and Payroll set up of a new employee in Core-CT.

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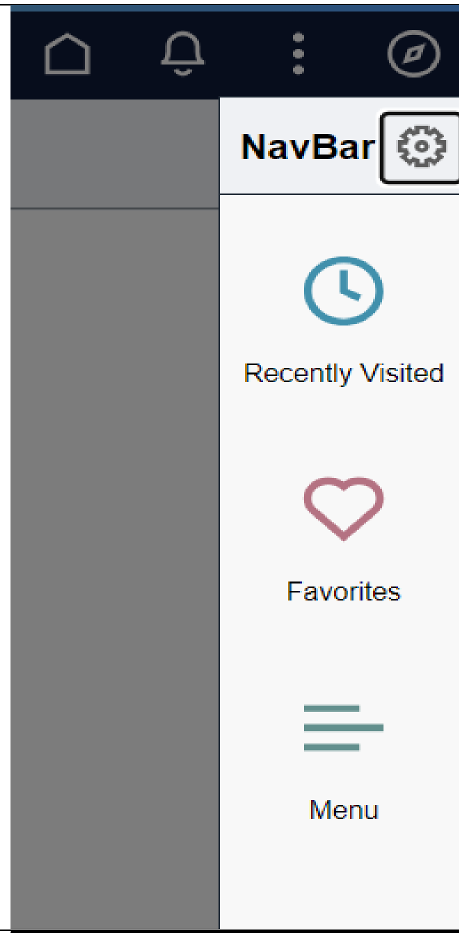
<tr><td>Nav Bar > Menu</td><td>
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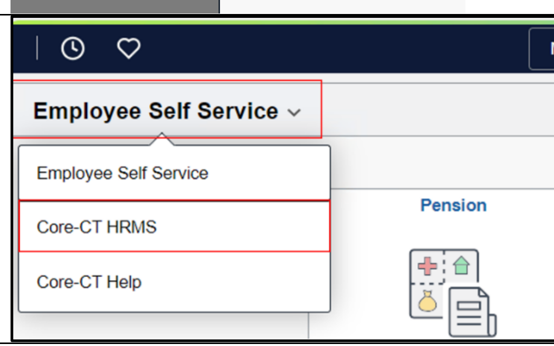
<tr><td>Fluid Dashboard</td><td>
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Part A – Verify Position

Part A should be performed before commencing the Hire Process.			
	Step	**Step Details**	**Core-CT Module**
☐	**Verify Position Data**	Using the Fluid Dashboard, navigate to: ***Core-CT HRMS > Workforce Administrator > Position Management > Manage Position*** 1. Search for the “Position Number” in the Position Number field. **Important:** The Position Status field on the Position page must be set to Approved and the Status field must be set to Active in order to hire someone into that position. If the Position Status field is not set to Approved or the Status is not set to Active, then the position cannot be used for the hire process. **Important:** Verify that the Refill Indicator field is accurate on the Position page. The Refill Indicator must be set to “Auto’ or “Six Months’ in order to hire someone into that position. A Refill Indicator set to Manual is not authorized to fill.	**HR**

Part B – Hire Employee

Part B identifies only the initial steps that should be taken to hire an employee. For detailed step by step instructions, refer to the Job Aids titled “Hiring an Employee” and “Hire/Rehire”			
	Step	**Step Details**	**Core-CT Module**
☐	**Hire Employee**	Using the Fluid Dashboard, navigate to: ***Core-CT HRMS > Workforce Administrator > Manage Human Resources > Create Employee*** 1. Enter and/or select the appropriate information. **Important:** Employee must exist in Core-CT in order for his/her check to be processed. **Important:** Benefit Service Date on the Job page must be populated on the Employment Section, or the employee WILL NOT be paid. Benefit Service date should be accurate or employee will accrue leave time at the wrong rate. **Important:** Remember to select the Time Reporter Data link after completing the hire through the Create Employee tile or use the Manage Time Reporter Data tile to access this information. **Important:** Avoid creating multiple identification numbers for an employee by verifying previous State employment. Enter the Social Security number and tab out to see if the SSN is already in Core-CT or in	**HR**

		the State Employees Retirement System. Refer to Hiring an Employee job aid for detailed information on how to proceed if the SSN is already in use. **Important:** If an employee was terminated from the State of Connecticut and returns back to work and he/she was originally in Core-CT, then the employee should be processed as a rehire. **Important:** If an employee was terminated from the State of Connecticut and returns back to work and he/she does not exist in Core-CT, then the employee should be processed as a direct hire. **Important:** If an employee holds more than one job, then he/she should be processed using the Organizational Relationship tile.	
☐	**Enter Identification Data (If Applicable)**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Workforce Administration*** > ***Personal Information*** > ***Citizenship*** > ***Identification Data*** 1. Enter and/or select the appropriate information.	**HR**
☐	**Enter Disability Data (If Applicable)**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Workforce Administration*** > ***Personal Information*** > ***Disability*** > ***Disabilities*** 1. Enter and/or select the appropriate information.	**HR**
☐	**(OPTIONAL) Enter Emergency Contacts**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Workforce Administration*** > ***Personal Information*** > ***Personal Relationships*** > ***Emergency Contact*** 1. Enter and/or select the appropriate information.	**HR**
☐	**(OPTIONAL) Enter Driver's License Data**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Workforce Administration*** > ***Personal Information*** > ***Biographical*** > ***Driver's License Data*** 1. Enter and/or select the appropriate information.	**HR**
☐	**(OPTIONAL) Enter License and Certificate Data**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Workforce Development*** > ***Profile Management*** > ***Profile*** > ***Person Profiles*** 1. Enter and/or select the appropriate information.	**HR**
☐	**(OPTIONAL) Enter Education Data**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Workforce Development*** > ***Profile Management*** > ***Profiles*** > ***Person Profiles*** 1. Enter and/or select the appropriate information. ion	**HR**

☐	**Run Personnel Action History Report**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Workforce Administration > Workforce Reports > Personnel Actions History*** 1. Enter and/or select the appropriate information. 2. Run Report and review transaction(s).	**HR**

Part C – Initial Benefit Data Check

Part C identifies the initial steps that should be taken to verify an employee's benefit data. Part C should be completed once an employee has been hired into Core-CT through Human Resources and the Benefits Administration program has successfully completed.			
	Step	**Step Details**	**Core-CT Module**
☐	**Verify Job**	Using the Fluid dashboard, navigate to ***Menu > Core-CT HRMS > Workforce Administrator > Mange Human Resources > Manage Job*** 1. On the Job Information section of the Job Details page, verify that the values in the FTE and Employee Class fields are correct for the employee. 2. Use the Benefit Program section on the Job Details page to verify that the Annual Benefits Base Rate field is filled with the life insurance coverage amount the employee was eligible for when the employee was first hired. **Important:** Benefits are determined by the primary job. **Important:** If the Annual Benefits Base Rate field is left blank on the Job page, then the employee will not be able to enroll in life insurance coverage and benefits administration will put the employee in error.	**BN**

Part D – Enrolling and Adding to Benefit Plans

Part D lists the tasks to enroll employees into benefit plans and adding dependents and/or beneficiaries into the plans. Part D should be performed after Part C has been completed.			
	Step	**Step Details**	**Core-CT Module**
☐	**Add Dependent / Beneficiaries**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary*** 1. Add the appropriate Dependent(s) and/or Beneficiary (ies). **Important:** When the appropriate relationship is selected in the "Relationship to Employee" dropdown menu, the Dep/Benef	**BN**

		type field will default to the correct value for the relationship. DO NOT CHANGE THE DEFAULT VALUE. **Important:** Dependent Beneficiary Information must be entered before it can be referenced in the benefit participation pages.	
☐	**Enroll into Benefits Plan(s)**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Benefits*** > ***Manage Automated Enrollment*** > ***Events*** > **On Demand Event Maintenance** 1. Enroll the employee into the appropriate plan(s)	**BN**

Part E – Auditing Base Benefits

Part E is the auditing portion of benefits. The tasks under Part E should be performed to identify employees' records with potential error conditions prior to open enrollment or anytime throughout the year.			
	Step	**Step Details**	**Core-CT Module**
☐	**Run and review the Base Benefits Audit Report**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Benefits*** > ***Reports*** > ***Audits*** > ***Base Benefit Audit By Agency*** 1. Run and review the report	**BN**
☐	**Run and review the Life Insurance Invalid Report**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Benefits*** > ***Reports Contribution and Deductions*** > ***Life Insurance Invalid Report*** 1. Run and review the report	**BN**
☐	**Run and review the Missing Elections Report**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Benefits*** > ***Manage Automated Enrollment*** > ***Investigate Exceptions*** > ***Missing Elections Rpt*** 1. Run and review the report	**BN**
☐	**Run and review the Invalid Benefit Elections Report**	Navigate to ***Nav Bar*** > ***Menu*** > ***Core-CT HRMS*** > ***Benefits*** > ***Manage Automated Enrollment*** > ***Investigate Exceptions*** > ***Invalid Elections Rpt*** 1. Run and review the report	**BN**

Part F – Initial Time and Labor Data Check

	Step	Step Details	Core-CT Module
Part F identifies the initial steps that should be taken to verify an employee's Time and Labor data. Part F should be completed once an employee has been hired into Core-CT through Human Resources. If your agency does not use Time and Labor, then proceed to Part K.			
☐	**Verify Time Reporter Data**	Using the Fluid Dashboard, navigate to ***Core-CT HRMS > Time and Labor > Manage Time Reporter Data*** 1. Verify that the information entered during the employee's hire is correct **Important:** If the information on the Maintain Time Reporter Data page is incorrect and you wish to update, remember that correct history on the Time Reporter Data page will only be available for the current pay period. In addition you will only be able to add rows with an effective date that is greater than or equal to the pay period beginning date of the current pay period. No corrections to rows that fall in past pay periods can be made. **Important:** Verify the employee's group membership by clicking the Group Membership link **Important:** If an employee has been terminated on the Job Data page, make sure to Inactivate the employee on the Maintain Time Reporter Data page for the appropriate employee (EMPLID) and employee record number (RCD #). **Important:** Remember, Using the Fluid Dashboard, navigate to ***Core-CT HRMS > Workforce Administrator > Manage Human Resources > Manage Job.*** The initial setup of this page should be done during the Hire Process using Time Reporter Data under the Actions dropdown, found on the Job Actions Summary page.	**TL**

☐	**Verify / Assign Work Schedule**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Time and Labor > Enroll Time Reporters > Assign Work Schedule*** 1. Verify the schedule assignment 2. If the schedule assignment is incorrect, add a new row and insert the appropriate schedule assignment. **Important:** If an employee is a positive time reporter then the Assign Workgroup Default Schedule field on the Assign Work Schedule page must be set to 'Use Default Schedule'. Employees on an unpaid leave of absence on JOB should be given the ZERO_HOURS schedule and no time should be reported for the dates the employee is on the unpaid leave of absence.	**TL**
☐	**Assign Leave Plan, if applicable**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Benefits > Enroll In Benefits > Leave Plans*** 1. Assign employee to the appropriate leave plans. **Important:** When assigning leave plans to employees make sure to set the effective date to a date after the last leave accrual run. You can check the last Accrual Date by viewing the "Accrual Date" of the Leave Accruals page for an active employee with leave plans.	**TL/BN**
☐	**Assign Comp/ Holiday Time Off Plan, if applicable**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Time and Labor > Enroll Time Reporters > Comp Plan Enrollment*** 1. Assign employee to the appropriate comp and/ or holiday time off plan.	**TL**

Part G – Enter Time

Part G is the step to enter time into Core-CT.			
	Step	**Step Details**	**Core-CT Module**
☐	**Enter Time into Core-CT**	Using the Fluid Dashboard, navigate to ***Core-CT HRMS > Manager Self Service > Team Time > Enter Time*** **OR** If you are a self service employee, using the Fluid Dashboard, navigate to ***Self Service > Time > Report Time*** 1. Enter time for yourself and/or your employees.	**TL**

Part H – Validate Time

Part H lists different steps that can be performed to verify/validate the time entered into Core-CT. Part H can only be performed during a week when Time Administration is running.

	Step	Step Details	Core-CT Module
☐	**Check for Exceptions (Errors)**	Navigate to ***Nav Bar > Menu > Core CT-HRMS > Time and Labor > View Time > Exceptions*** 1. Review the exceptions	**TL**
☐	**View Payable Time**	Using the Fluid Dashboard, navigate to ***Core-CT HRMS > Manager Self Service > Team Time > Payable Time*** **OR** If you are a self-service employee, using the Fluid Dashboard, navigate to ***Employee Self Service > Time >Payable Time*** 1. Review the payable time	**TL**
☐	**Correct or Allow an exception**	1. To correct an exception: Using the Fluid Dashboard, navigate to ***Core-CT HRMS > Manager Self Service or Self Service > Team Time > Manage Exceptions*** to correct the exception if appropriate **OR** 2. To allow an exception: Navigate to ***Nav Bar > Menu > Core-CT HRMS > Manager Self Service >Approve Time and Exceptions > Exceptions*** **Important:** All exceptions should be cleaned up every pay period. If the exception should not be cleaned up and you do not want the time to be paid then the time that is causing the exception should be deleted from the Timesheet page. **Important:** An exception for one day causes all time entered for that day to be in error. If the exception is not corrected or cleared, then the whole day will be in error and the employee will not receive pay for that day.	**TL**

Part I – Approve Time (Applies only to Time and Labor Self Service agencies)

Part I is only for agencies that have employees in workgroups set up as "Needs Approval" (e.g. Time and Labor Self Service agencies).			
	Step	**Step Details**	**Core-CT Module**
☐	**Approve Time**	Using the Fluid Dashboard, navigate to ***Core-CT HRMS > Manager Self Service > Time Approvals*** 1. Approve time as needed.	**TL**

Part J – Final Verification of Time

Part J outlines reports that can be used to obtain the status of time entered into Core-CT. Please note that some of these reports may be payroll reports.			
	Step	**Step Details**	**Core-CT Module**
☐	**Run Department Payable Status Rpt**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Time and Labor > Reports > Payable Status Report CTTLR252*** 1. Select the parameters to appear on the report 2. Run and review report.	**TL**
☐	**Run Time Summary Report**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Time and Labor > Reports > Payable Status Reports CTTLR251*** 1. Select/Type in the appropriate parameters. 2. Run and review report.	**TL**
☐	**Run Payroll Register On-Demand**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Payroll Processing USA > Pay Period Reports > Payroll Register On-Demand*** 1. Select/Type in the appropriate parameters. 2. Run and review report.	**PY**
☐	**Run Unprocessed Timesheet Report**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Time and Labor > Reports > Unproc Timesheets CTTLR403*** 1. Select/Type in the appropriate parameters 2. Run and review report	**TL**

Part K – Maintain Employee Payroll Data

Part K identifies the initial steps that should be taken to setup an employee's Payroll data. Part K should be completed once an employee has been hired into Core-CT through Human Resources.			
	Step	**Step Details**	**Core-CT Module**
☐	**Set up State and Federal Tax**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data*** 1. Enter the appropriate information. (Note: State Tax information must be setup with CT regardless of the state the employee actually lives.) **Important:** An employee with concurrent jobs will only have one tax record. Therefore, the tax set up will function for both jobs. Both agencies have access to update the tax record. Helpful Hint: This step should be performed at the time of hire and at the time an employee requests a tax change. If tax information has not been setup, the employee WILL NOT receive a paycheck.	**PY**
☐	**Set up Additional Pay**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Employee Pay Data USA > Create Additional Pay*** 1. Enter the appropriate information **Important:** If using the End Date field, make sure that the End Date is in the pay period that you would like the additional payment to be paid. For example an additional payment that is setup with an effective date of 04/05/2024 and an end date of 05/02/2025 will be paid out once. An additional payment that is setup with an effective date of 04/19/2024 and an end date of 05/16/2024 will be paid out twice. Once for the pay period that includes the 05/02/2024 date, and once of the pay period that includes the 05/16/2024 date.	**PY**
☐	**Set up General Deductions**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions*** 1. Enter the appropriate information **Important:** New hires are auto enrolled into the Tier IV plan. Agencies no longer have to set up retirement deductions unless a change is desired after the autoenrollment runs.	**PY**
☐	**Set up Direct Deposit**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Employee Pay Data USA > Request Direct Deposit*** 1. Enter and/or select the appropriate information	**PY**

		Important: Regardless of the number of jobs an employee holds, only one direct deposit account is allowed.	
☐	**Set Up Garnishments**	***Please contact the Central Payroll Garnishment Unit if the employee needs a Garnishment setup.***	**PY**

Part L – Validate Pay

Part L lists steps that can be performed to verify/validate the pay generated for an employee. Part L can only be performed after the employee has been processed by pay calculation.			
	Step	**Step Details**	**Module**
☐	**View Paycheck Data**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck (or Review Paycheck Summary)*** 1. Enter the appropriate information 2. Review the data. **Important:** These pages are view-only. This data is available the Monday following a Pay End Date.	**PY**
☐	**Run Payroll Register On-Demand**	Navigate to ***Nav Bar > Menu > Core-CT HRMS > Payroll for North America > Payroll Processing USA > Pay Period Reports > Payroll Register On-Demand*** 1. Enter and/or select the appropriate parameters. 2. Run and review report**.**	**PY**