

Setting Up a New Employee (Task 16)

Overview

Before adding new employees to the schedule, specific settings will need to be adjusted in the Personnel tab.

Process

The process below describes how to set up a new employee's information including Primary Schedule Job, waivers and attributes, and availability.

In this scenario a new Courtesy Clerk, Monique Baker, was hired by the store.

From the main menu:

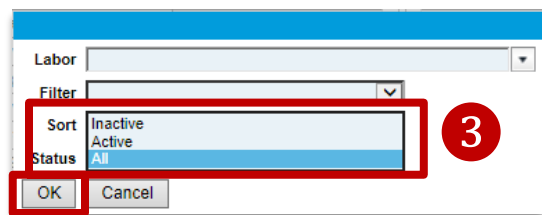
1. Select the **Personnel** tab.



2. Select **Filter** from the toolbar.



3. Locate the Status field and select **All** from the drop down options.



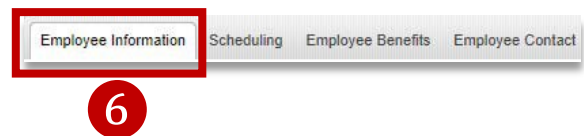
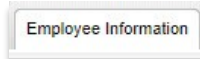
4. Select **OK**. The screen will return to the Personnel tab.



5. Use the **drop down arrow** from the toolbar to locate the new employee (Monique Baker) on your list.



6. Select **Employee Information** tab from the secondary toolbar.



Continued on next page

Setting Up A New Employee (continued)

7. Go to the Job Information table and change the Primary Scheduled Job to the correct job title (Courtesy Clerk).

Field	Value
Hire Date	10/05/2014
Seniority Date	10/05/2014
Contract Entry Date	
Contract Lvl Number	6
Labor Agreement	0160
Location Group	NA
Labor Job Group	COURTESY CLK
Job Class Grouping	Courtesy Clerks
Job Title	Courtesy Clerk
Home Dept	347
Acct Code	199
Primary Sch Job	Unassigned.Unassigned

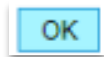
8. Select **Save** from the toolbar



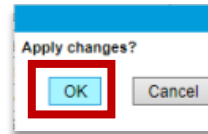
8



9. Click **OK** when prompted to apply changes.



9



10. View the **Waivers and Attributes** table. Adjust the correct Waivers for the employee.

- a. **6hr Waiver** (California ONLY) – indicates whether an employee can work up to 6 hours with no meal break. The default is set per the employee's contract.

This setting can be changed to Yes or No if the employee elects to waive or retain the 6-hour work rule

- b. **10hr Waiver** (California ONLY) – default is **No**; If the employee elects to waive the 10-hour work rule, change this setting to Yes

- c. **Meal Break Length** – default is **60min**

****Updates take effect the next day, this change requires an over-night refresh****

Options include 30min break lengths

- d. **4x10** – default is **No**

Field	Value
Default 6hr Waiver	Y
6hr Waiver	Default
10hr Waiver	N
Meal Break Length	60min
4x10	N

Continued on next page

Setting Up A New Employee (continued)

11. View the **Labor** table and ensure that the Primary Scheduled Job is checked and the Auto Schedule box is checked.

Sort	Labor	Primary	Auto Schedule	JobCode
	349 Indirect Indirect	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11004
	349 Indirect Jury Duty	<input type="checkbox"/>	<input type="checkbox"/>	11004
	352 Training Training	<input type="checkbox"/>	<input type="checkbox"/>	11004

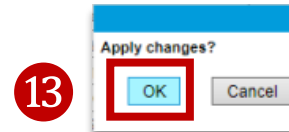
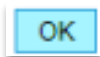
Note: All employees have three standard schedule jobs –

- Indirect
- Training

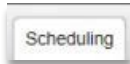
12. Select **Save** from the toolbar.



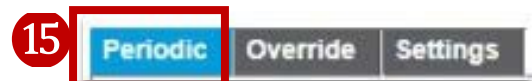
13. Click **OK** when prompted to apply changes.



14. Go to the **Scheduling** tab to enter Availability and Unavailability.



15. Select the **Periodic** tab (default in the schedule grid).



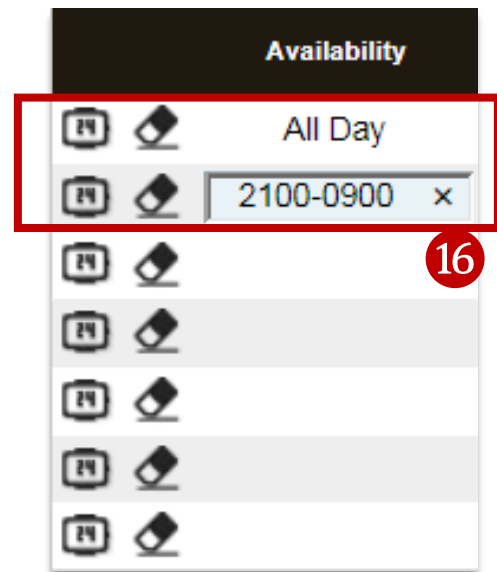
Setting Up A New Employee (continued)

16. Enter the employee's long-term availability, click inside the cells under the Availability column.

- Selecting **All Day** represents a midnight to midnight availability to work



- Entering a timeframe restricts the employee's availability to work within the range
- For overnight or graveyard shift availability, enter a timeframe of 9:00pm (2100) to 9:00am (next day) on the calendar day when the shift will start
- For swing shifts (past 12am), enter a timeframe of 2:00am to 2:00am (next day) on the calendar day when the shift will start

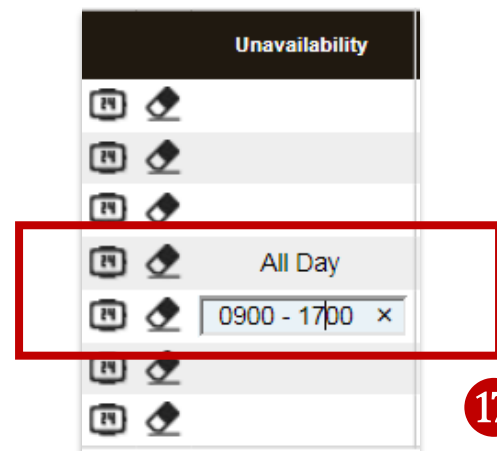


17. Enter the employee's unavailability, click inside the cells under the Unavailability column.

- Selecting **All Day** represents a 24-hour unavailability to work



- Entering a time-frame restricts the employee's unavailability to work within the range
- To delete a shift, select the Erase icon



18. Select the **Save** icon.



****For employees that are minors, continue to the page 5, otherwise continue to page 6****

Setting Up A New Employee (continued)

19. Enter the employee's minor status. Select the **Minors** tab.



19

20. The **Minor Rule** will be set by PeopleSoft.

The **School** can only be set to **IN** or **OUT** which sets the employee to the in-school scheduling rules or the out of school scheduling rules.

Set the **School** to **IN** or **OUT** depending on the time of year.

Field	Value
Minor Rule	CA_NorCal
School	CA IN
Minor Exempt	CA IN
Exemption Reason	CA_Out

20

*** This only applies to **Minors** ***

21. The **Minor Exempt** is only to be set to **Y** if an employee is no longer in school because they are **Emancipated** or have **Graduated**.

Setting **Minor Exempt** to **Y** will only reflect the out of school scheduling rules and will not remove all scheduling limitations until the employee is no longer a minor.

Field	Value
Minor Rule	CA_NorCal
School	CA IN
Minor Exempt	N
Exemption Reason	Y

21

22. The **Exemption Reason** field only needs to be set if **Minor Exempt** is set to **Y**

Select either **Emancipated** or **High School Graduate** from the drop down

Field	Value
Minor Rule	CA_NorCal
School	CA IN
Minor Exempt	Y
Exemption Reason	Emancipated

22

23. Select the **Save** icon.



23

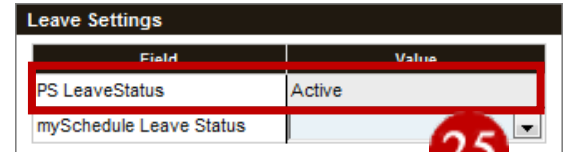
Setting Up A New Employee (continued)

24. You must adjust the employee's **Leave Status**. Select the **Leave Status** tab.



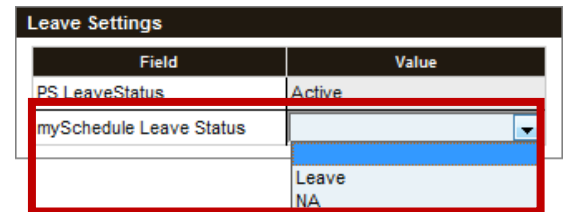
24

25. When the employee account gets updated from PeopleSoft you will be able to see their **PS LeaveStatus**.



25

26. To change the employee's status in mySchedule, select either **blank** or **Leave** from the drop down menu for **mySchedule Leave Status**.



26

Changing the mySchedule Leave Status will not change the PeopleSoft Leave Status and if set manually will not automatically update from PeopleSoft

mySchedule Leave Status must be set to Active or Leave to allow or prevent scheduling.

27. Select the **Save** icon.



27

You will now be able to schedule the new hire .