Add New Employee Pre-Employment Information
(For State and Research Foundation Employees)

Before you add a new employee to the database you must first go to the Search Match page and search the PS database to make certain that the person does not already exist.

The person that you are hiring may exist in the database already for the following reasons:

- They are an active, current employee at the University, UHMC or Long Island State Veterans Home
- They are a current or past student of the University
- They are a retired or terminated employee
- They are an “affiliate” of the University (i.e., volunteer, temporary worker, visitor, etc.)

Navigation to Search/Match:
  Workforce Administration > Personal Information > Search for People
Employee Personal Data

The **Employee Personal Data** component is used to record the new employee’s personal and demographic information as well as certain “pre-employment” information required by Human Resource Services and other areas that issue ID Cards, Library access and computer accounts. You must complete this information for all new State and Research Foundation employees.

You will obtain this information from the **Demographic Form** that the new employee completed.

**Navigation:**

SBU > SBU Human Resources > Use > Employee Personal Data

Modify Employee Personal Data

Find an Existing Value  Add a New Value

EmplID: begins with ▼  
Empl ID Nbr: ▼  
Name: begins with ▼  
Last Name: begins with ▼  
Campus ID: begins with ▼  
National ID: begins with ▼  
□ Case Sensitive

Search  Clear  Basic Search  □ Save Search Criteria

If you found the person in **Search/Match** you will enter their EmplID here and go on to modify the existing personal/demographic information (refer to the “Update Personal Information” instructions).

If you did not find the person in **Search/Match**, click the **Add a New Value** tab to add them now.

Modify Employee Personal Data

Find an Existing Value  Add a New Value

EmplID: NEW

Add

Find an Existing Value  Add a New Value

Leave **NEW** in the EmplID field and click **Add**.

A new EmplID number will be assigned after you enter and save all of the required information. The EmplID is the **Stony Brook ID** number that will appear on the employee’s ID Card.
Click the **Personal Data 1 tab**

The **Effective Date** will default to the today's date.

Click the **Add Name** link

Complete the name information and click **OK**.
Biographic Information:

Enter the Date of Birth (mmddyyyy).

Select the Birth Country.

Biographical History:

In the Effective Date field, enter the employee’s hire date. You cannot enter a future date. If the hire date is in the future then leave today’s date.

Select the Gender.

Select the Highest Education Level.

Select the Marital Status.

Enter the National ID (Social Security Number).
**Click the Contact Information tab**

Enter the person’s **Home Address**:

1. Click the **Add Address Detail** link.
2. Click the **Add Address** link.
3. Enter the home address information and click **OK**.
   - To enter a foreign address, click the **Change Country** link first.
4. Click **OK** again.
To add a Mailing address:

Click the **Add a New Row** button. 
Select **Mailing** for the Address Type. 
Click **Add Address** Detail.

Click **Add Address**

Enter the Mailing Address and click **OK**

Click **OK** again
Enter the Phone Information:

Select **Home** for the **Phone Type** and enter the complete telephone number including area code.

Select the **Preferred** option.

Office Phone is also required. To add it, click the **Add a new row button** and choose **Office 1** as the **Phone Type**.

De-select the **Preferred** option if selected. Only one phone type should be marked as **Preferred**.

The **Campus Email** information will be populated automatically. Add the home/personal email if known.
Click the **Eligibility/Identity tab**

Select the **Ethnic Group**.

Select the **Military Status**.

**I9 Information** will be completed by HRS staff.
Click the **SB Personal Data** tab

Enter the **Domestic Partner/Spouse Name**.

Under **Citizenship Status**, select **USA** as the **Country**.

Then select the person’s **Status** in this country. This will be **Native** for US Citizens and for Non-US Citizens it will be one of the other options in the list:

<table>
<thead>
<tr>
<th>Description</th>
<th>Status</th>
<th>Dependent ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Native</td>
<td>USA</td>
<td></td>
</tr>
<tr>
<td>Naturalized</td>
<td>United States</td>
<td></td>
</tr>
<tr>
<td>Alien Permanent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alien Temporary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permanent Resident</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Visa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undocumented Alien</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Indicated</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If this is a Non-US citizen, click the **Add a new row** button and select the person’s **Country** of citizenship. Then select **Native** for the **Status** in that country.

If the person doesn’t have a Social Security Number and they’ve been assigned a temporary USB number enter it in the **Campus ID/Pseudo ID** field. Otherwise, leave this field blank.
Click the Pre-Employment tab

The information on this page must be completed for all new State and Research employees. It is also used to facilitate getting an ID Card (not a Badge), SOLAR account, Notes email account and Library access for employees BEFORE the hire process is completed by HR. This can be done by making the Effective Date up to 70 days before the employee’s hire date.

Enter the Office Address information.

Enter the Hire Date.

Enter the Eff Date - this is the date that you want this pre-employment information to become effective. This date can be today’s date or up to 70 days BEFORE the employee’s hire date for those employee’s who need to obtain an ID Card, SOLAR account, Notes email account and/or Library access early. Do not enter a date earlier than today!

Select the Business Unit – RSFND (for Research) or USBNY (for State).

Enter the Dept ID (6-digit budget account code followed by 2 zeros).

Status should default to Active when adding a new employee. It will automatically be changed to Inactive once the Hire process is completed by Human Resources.
If the employee needs Email Notes or Library access select these options.

The Fac/Staff and SOLAR indicators will be turned on when you enter the Dept ID. This information is used to indicate that the new employee needs an ID Card and SOLAR account.

If this is a Southampton employee select this option.

You will only Add a New Row (+) if you need to change any of this information after it is entered and saved. Remember to add the Effective Date if you do make a change!
**Save the Employee Personal Data**

Once you’ve entered all of the required information on the pages in the Employee Personal Data component click the SAVE button.

Notice that the new employee has been assigned a EmplID (Stony Brook ID) number.

Now go ahead and complete the Person Profile page, Emergency Contact page, and the Office Address page.

And then Print the Hire Form, complete it and submit for the necessary approvals.

The person’s status in PeopleSoft will still be “Non-employee” until HR receives the paperwork and completes the hire in PeopleSoft.
Emergency Contact

Navigation:
SBU > SBU Human Resources > Use > Emergency Contact

Enter the **Contact Name**.

Select the **Relationship to the Employee**.

Indicate whether this is the **Primary Contact** by checking this box.

Enter the **Address** and home **phone** information. If this is the same as the employee’s home address/phone just click the box “Same Address and Same Phone as Employee” and the information will fill in.

If the contact has other phone numbers that you’d like to record, click the **Other Phone Numbers** tab and complete that page. You can add as many phone numbers as you’d like on this page by clicking the **Add a New Row (+)** button.

Click **Save**
Office Address

**Navigation:**

SBU > SBU Human Resources > Use > Office Address

<table>
<thead>
<tr>
<th>Office Address</th>
<th>Emplid: 107502683</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sammy Rand</td>
<td></td>
</tr>
<tr>
<td>Zip #: 3382</td>
<td>Client Support</td>
</tr>
<tr>
<td>Building #: 005</td>
<td>Mt. Grove Library</td>
</tr>
<tr>
<td>Room #: 35120</td>
<td></td>
</tr>
</tbody>
</table>

**Status:** UNKNOWN

**Contact Category:** M Manager/Supervisor

<table>
<thead>
<tr>
<th>Phones</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td></td>
</tr>
<tr>
<td>HOME</td>
<td></td>
</tr>
<tr>
<td>OFF1</td>
<td></td>
</tr>
</tbody>
</table>

**Email**

<table>
<thead>
<tr>
<th>Email</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td></td>
</tr>
</tbody>
</table>

The office address will default from the information that you entered on the Pre-employment page.

If applicable, select the **Contact Category** (i.e., Assistant to Chair, Essential Personnel – Snow, Manager/Supervisor, etc.).

Do not enter email information. The campus email will be filled in automatically for all employees.

Click **Save**
**Add Education**

The **Person Profile** page is used to track *Education, Licenses/Certifications* and Languages. Department users can only add this information for new employees (who do not have a job record in PeopleSoft yet). To update this information for existing employees, contact Human Resource Services.

**Navigation:**

SBU > SBU Human Resources > Use > Person Profile

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<table>
<thead>
<tr>
<th>Competencies</th>
<th>Responsibilities</th>
<th>Qualifications</th>
<th>Education</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**School Education (Approval Not Required)**

There are currently no School Education for this profile. Please add one if required.

- **Add New School Education**

**Degrees (Approval Not Required)**

There are currently no Degrees for this profile. Please add one if required.

- **Add New Degree**

**Areas of Study (Approval Not Required)**

There are currently no Areas of Study for this profile. Please add one if required.

- **Add New Areas of Study**

**Profile Groups**

- **Add Profile to Group**

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*When you come to the Person Profile page, click the Education link.*

*Then, click Add New Degrees.*
Enter the information provided on the *Demographic Form* or as it appears on the *diploma*:

- **Select the Degree.**
- **Enter the Country.**
- **Enter the State.**
- **Select the Major Code.**
- **Select the School Code.**
- **Enter the Year Acquired.**
- **Select the Graduated checkbox.**
  
  *(If entering more than one Degree, click Apply and Add Another).*

  **Click OK.**
You will see the Degree listed here but it will not be posted until it is submitted.

Click **Save**.

Notice that the Degree is saved but not posted to the Person Profile yet.

You must click **Submit** to post it.
Click **Submit** one more time to complete the transaction.

Now the Degree is now posted to the Person Profile.

If you made an error and need to delete the degree click the delete button (the trash can).

Click **Save**.
Licenses and Certifications

The **Person Profile** page is used to track *Education, Licenses/Certifications* and *Languages*. Department users can only add this information for new employees (who do not have a job record in PeopleSoft yet). To update this information for existing employees, contact Human Resource Services.

**Navigation:**

SBU > SBU Human Resources > Use > Person Profile

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When you come to the Person Profile page, click the **Qualifications** link

Then, click **Add New Licenses and Certifications**
Enter the information provided on the **Demographic Form** or as it appears on the **License/Certification**:

1. Select the **License**.
2. Select the **Country**.
3. Select the **State**.
4. Enter the **Expiration Date**.
5. Enter the **Issue Date**.
6. Enter the **License/Certification Number**.
7. Enter the **Issued By** information.
8. (If entering more than one License/Certification, click **Apply and Add Another**).
9. Click **OK**.

You will see the License/Certification listed here but it will not be posted until it is submitted.

Click **Save**.
Notice that the License/Certification was saved but **not posted** to the Person Profile yet.

Click **Submit** to post it.

Click **Submit** one more time to complete the transaction.
Now the License/Certification is now posted to the Person Profile.

If you made an error and need to delete the degree click the delete button (the trash can).

Click **Save**.
Languages

The Person Profile page is used to track Education, Licenses/Certifications and Languages. Department users can only add this information for new employees (who do not have a job record in PeopleSoft yet). To update this information for existing employees, contact Human Resource Services.

Navigation:

SBU > SBU Human Resources > Use > Person Profile

When you come to the Person Profile page, click the Qualifications link

Then, click Add New Language Skills
Enter the information provided on the **Demographic Form**:

1. Select the **Language**.
2. Enter additional information if known.
3. (If entering more than one Language, click **Apply and Add Another**).
4. Click **OK**.

Click **Save**.
Notice that the Language was saved but not posted to the Person Profile yet.

You must click **Submit** to post it.

Click **Submit** one more time to complete the transaction.
Now the Language is posted to the Person Profile.

If you made an error and need to delete the degree click the delete button (the trash can).

Click **Save**.