

Use this checklist when: You have new incoming staff employee hire who has completed onboarding activities in Taleo.

Step 1: Review the New Person list and identify your new hire

1 Select **New Person** from the **Navigator**.

2 Identify the new employee to be converted:

- Highlight the row containing the employee's name
(Note: **do not** click the blue name hyperlink)
- Click the **Actions** button and select **Convert**

Step 2: Complete the Required Fields to convert the worker in Oracle Cloud HCM

3 Enter the required info on each page (detailed list below)

4 **Review** and **Submit** for approval.
Note: the employee will not become active until both 1-9 steps and all approvals have been completed.

Page	Action Needed				
Identification	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm Start Date <input type="checkbox"/> Action Reason: Hire - Employment or Reestablish Employment (as appropriate) <input type="checkbox"/> US Citizen or Permanent Resident: indicate Yes or No 				
Person Information	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm address was populated during onboarding – if missing/incomplete, enter the address. (Note: the employee can add more addresses and/or other information within Personal Information) 				
Employment Information	<ul style="list-style-type: none"> <input type="checkbox"/> New Hire Status: select Include in the New Hire Report (the 1-9 information will be added by Central HR) <input type="checkbox"/> Payroll Relationship Details: <ul style="list-style-type: none"> o Expand Payment Details section o Select Overtime Period (for Biweekly or Weekly employees only) <input type="checkbox"/> Assignment Status: confirm Active – Payroll Eligible <input type="checkbox"/> Reporting Establishment: select The Vanderbilt University <input type="checkbox"/> Confirm: FTE and Headcount (use Work Measure Details if needed to add/update) <input type="checkbox"/> Manager Details: Enter name of manager <input type="checkbox"/> Payroll Details: Click + (plus sign) to add a line for payroll <ul style="list-style-type: none"> o Select the Payroll Relationship (ex: Biweekly – note: <i>IC payrolls are only selected by International Tax</i>) o Expand <u>both</u> Payment Details sections, and then under <u>each</u> of those two sections: <ul style="list-style-type: none"> ▪ Select Overtime Period (for Biweekly or Weekly employees only) ▪ Select Time Card Required (choose Yes for Biweekly or Weekly / No for Monthly) <input type="checkbox"/> Enter Collective Agreement information if applicable (union employees only) 				
Compensation and Other Information	<ul style="list-style-type: none"> <input type="checkbox"/> Enter: Salary basis and amount (Note: Be sure amount per Taleo agrees with Core HR – if not, contact your HR Recruiter to adjust the Taleo record) <input type="checkbox"/> Enter: Award Compensation (if applicable) <input type="checkbox"/> Enter Default Expense Account:* <table border="1" style="width: 100%; margin-top: 5px;"> <tr> <td><input type="checkbox"/> Entity and Financial Unit: select as appropriate</td> <td><input type="checkbox"/> Account: 6740 – Miscellaneous Expense</td> </tr> <tr> <td><input type="checkbox"/> Net Asset Class: 05 – General Unrestricted</td> <td><input type="checkbox"/> Other fields: select default values</td> </tr> </table> 	<input type="checkbox"/> Entity and Financial Unit: select as appropriate	<input type="checkbox"/> Account: 6740 – Miscellaneous Expense	<input type="checkbox"/> Net Asset Class: 05 – General Unrestricted	<input type="checkbox"/> Other fields: select default values
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* Important: The Default Expense Account is used to populate default COA string in **Expense Reports** and **Procurement Requisitions** (as applicable). If needed, **payroll costing** may be completed via **Manage Costing for a Person** after the new person's assignment is active.