Checklist: Convert a Pending Worker (Staff)

Use this checklist when: You have new incoming employee 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 **Convert** button

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 your transaction and **Submit** for approval.
   Note: the employee will not become active until the I-9 is completed and Central HR approves.

<table>
<thead>
<tr>
<th>Page (train stop)</th>
<th>Action Needed</th>
</tr>
</thead>
</table>
| Identification             | □ Confirm Start Date  
□ Action Reason: Hire or Rehire (as appropriate) |
| Person Information         | No entries needed                                                            |
| Employment Information     | □ New Hire Status: select **Include in the New Hire Report** (the I-9 information will be added by Central HR)  
□ Payroll Relationship Details:  
   - Expand **Payment Details** section  
   - Select **Overtime Period** (for Biweekly or Weekly employees only)  
□ Assignment Status: confirm **Active – Payroll Eligible**  
□ Reporting Establishment: select **The Vanderbilt University**  
□ Manager Details: **Enter name of manager**  
□ Payroll Details:  
   - Add **Payroll** (ex: Biweekly, Regular Monthly)  
   - Expand the two **Payment Details** sections, and then under each of those two sections:  
     - Select **Overtime Period** (for Biweekly or Weekly employees only)  
     - Select **Time Card Required** (choose Yes for Biweekly or Weekly / No for Monthly)  
□ Enter **Collective Agreement** information if applicable (union employees only) |
| Compensation and Other Information | □ Confirm: **Salary basis and amount**  
   - Note: if incorrect, contact your HR Recruiter to make the update – Taleo and Core HR must be in sync  
□ Enter default expense account:  
   - **Entity and Financial Unit**: select as appropriate  
   - **Net Asset Class**: 05 – General Unrestricted  
   - **Account**: 6740 – Miscellaneous Expense  
□ **Other fields**: select default values |