### **Unclassified Staff New Hire integration (Cornerstone to Banner integration):**

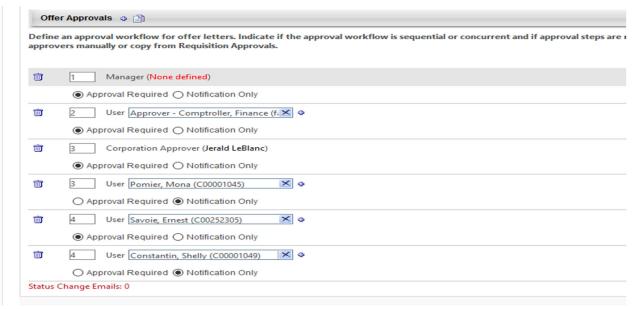
The Office of Human Resources is continuing with our initiatives to automate personnel actions, first utilizing DocuSign to approve PAFs rather than physical paper routing, and now to use Banner and Cornerstone functionality to replace our PAF utilizing EPAFs (electronic PAFs).

**EPAFS** are a product/feature within our Banner system, which will be used for most of our personnel transaction Approvals and application to employee records. One important component of an EPAF is the existence of a ULID (Employee ID C#) in order to associate the transaction with the respective employee. This highlights an issue for new employees to the University, who may not have a ULID, resulting in the need for a unique solution for new hire processing. Our team has been working on configuring a solution using an integration between our Recruit software in Cornerstone (CSOD) and Banner to solve this issue via a data-feed automation.

Initially this feed will **ONLY** target **New Fulltime Unclassified Staff** hires; Faculty job offers & Classified hires have not been adapted to our Cornerstone system yet, but should be in the near future.

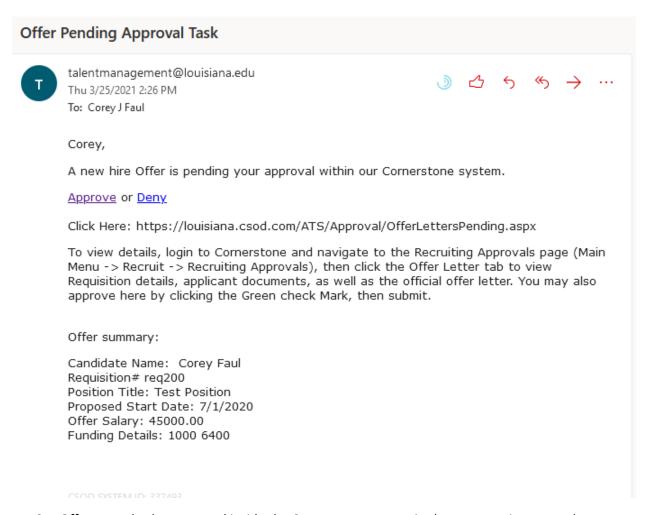
#### **Revised Process:**

 Requisitions to fill <u>positions</u> will be submitted via our current processes; however, an additional routing for personnel actions (<u>Job offers</u>) will be established by HR mimicking the current routing of PAFs in Docusign.



2. Once a candidate is selected as a New hire, a representative from the Hiring Dept. or committee will simply change the candidate's status in the requisition to "Offer Letter", which will notify HR to coordinate offer details (salary, start date, etc.) and submit to the pre-established Offer approval queue.

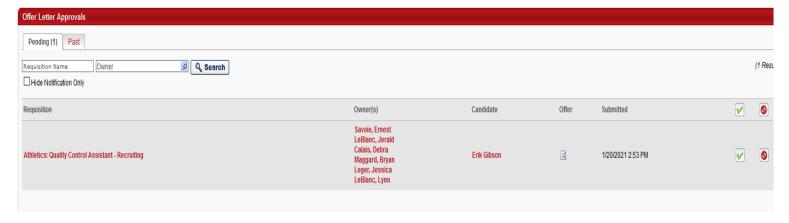
Offers can be approved directly via the email message, utilizing the same approve/deny functionality as our position Requisition approvals. A summary of the personnel action will appear within this email template for ease of approvals. For additional information, a link directly to the offer approval menu will also be imbedded within the message, re-directing into the Recruiting Approvals menu:



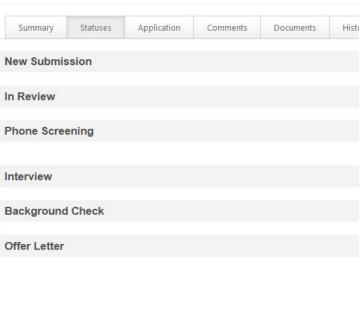
3. Offers can also be approved inside the Cornerstone system in the same environment that Requisitions route, the "Recruiting Approval" page in CSOD. The Offer approvals are separated in their own tab of this page.



4. Within this tab, you can view the offer letter, and are also provided links to refer to the requisition information and the candidate's documents (Resume/CV/References/etc.) Approvals are processed utilizing the same check mark or decline circle icons as requisition approvals. Additional details can also be accessed from the hyper-linked columns listed in this menu:



- a. The Requisition Column link will redirect to the position data approved during the requisition process, including funding information, the approved salary range, etc.
- b. The Candidate Column link will redirect into the Candidate's applicant profile, where application documents including the Resume and Cover letter, as well as other relevant documents (Reference lists, portfolios, etc) may be viewed or retrieved.
- c. The Offer column linked icon will launch the actual offer letter document which will be submitted to the candidate post-approval .
- 5. Approvals can be tracked from the Candidate Profile's **Status** tab, which will display all approvals received at that point, as well as any comments made at each prior approval step. To track the status, access the Candidate's profile from the Candidate linked name (pictured above), then click **Statuses**, and View Details:





All Approvals received thus far, as well as any comments made will appear from this Details view.

### View/Edit Approvals Status User Decision Comments Finance Approver - Comptroller Approved on 1/20/2021 adminhrforms@louisiana.edu Jerald LeBlanc approving for FY 21. **4** 3374826235 Approved on 1/20/2021 ■ jerrylukeleblanc@louisiana.edu **Ernest Savoie \$** 3374826203 Sent on 1/20/2021 joseph.savoie@louisiana.edu

6. Once all approvals are attained, HR will submit the offer letter along with a brief new hire data form to the candidate (to gather identification data). After acceptance notifications will go out advising accordingly. Approvers will be able to view completed/accepted Offers from the Applicant profile of the selected Candidate. Upon acceptance of the offer, HR marks the candidate as hired, which triggers a integration from CSOD to Banner, creating the new ULID or updating an existing ID, and populating their employee and job record, completing the hiring process. Automated Notifications will also occur at this point.

## Takeaways:

- All authorization for new hires will occur in Cornerstone system. The Offer document and other relevant data (app docs, position data, etc.) can be retrieved from the respective requisition, and will also be scanned into Banner's BDM (Business Document Mgmt.) software.
- Approval process will mirror the requisition approval, replacing the paper/digital DocuSign PAF for new fulltime staff hires/rehires.
- Initially this feed will only target New FT Staff hires; Faculty job offers and Classified Staff have not been adapted to our Cornerstone system yet, but should be in the near future.
- Position Changes for existing employees (promotions/job changes/Dept. Transfers), non-fulltime hires (temporary employees and student personnel), and other non-hiring changes (salary adjustments, title changes, funding source changes) for existing personnel will be automated with direct **EPAFs** in our next phase of our Automation rollout, prospectively later in 2021.

# **Summary of the Process Workflow:**

