



# ATTACHING DOCUMENTS

- Click Menu~ My Team~My Employees
- If you have a Role box on the upper left, select Payroll Rep
- Search by Last Name and click on the desired employee

Administration Employee Admin

UltiPro by ULTIMATE SOFTWARE

Paula Joyas | To Do | Help | Logout

Administrator Guide My Employees Employee Contracts Third Party Pay Organization Views PTO Requests Process Hires Find...

My Employees

add print help

Things I Can Do

FOR THIS PAGE

- [Add Employee \(Hire/Rehire\)](#)
- [Add Canadian Employee \(Hire/Rehire/Multi-Company Hire\)](#)
- [Add Global Employee](#)

Quick Tours and Tips

- [Human Resources - Resources for Employee Administrators](#)
- [UltiPro Navigation Overview](#)
- [Search with Filters Tour](#)
- [Modify Search Results Tour](#)
- [Hire/Rehire an Employee in the U.S. Tour](#)
- [Hire a Global Employee Tour](#)
- [Updating Global Employee Information Tour](#)

Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
<a href="#">Jackson, Mark M.</a>	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
<a href="#">Jackson, Mark M.</a>	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
<a href="#">Jackson, Richard R.</a>	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
<a href="#">Jackson, Susan D.</a>	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

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- The Employee Screen appears; click on the Documents Tab

ABC Company - Manufacturing(2)  
Mr. Mark M. Jackson - 152251252

UltiPro by ULTIMATE SOFTWARE

Mr. Mark M. Jackson

Personal Jobs Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Employee Summary Name, Address, and Telephone Status/Key Dates Property Contacts Private Info Identification Documents Termination Info

Mark M Jackson  
Shift Worker (312) 555-1234 mark\_jackson@ultimate.com

Personal Information

Name	Mark M. Jackson	Primary e-mail	mark_jackson@ultimate.com
Preferred	Mark	Alternate e-mail	
Employee number	152251252	Mailstop	
Time clock		Primary Home Phone	(312) 555-1234
Address	121 N 78 St Height City, CA 60000 United States	Primary Work Phone	(312) 555-9655
		Work extension	

Things I Can Do

FOR THIS PAGE

- [Change National ID \(SSN/SIN\)](#)
- [Manage Employee Photo](#)

FOR THIS TAB SET

- [Change Name, Address, or Telephone](#)
- [Add Alternate Phone Number](#)
- [View Status History](#)
- [Change Status](#)
- [Add Company Property](#)
- [Add Contact](#)
- [Change Private Information](#)
- [Change I-9](#)
- [Add Identification Document](#)
- [Terminate Employee](#)
- [Transfer Employee](#)
- [Change Other Personal Information](#)

Quick Tours and Tips

Human Resources -

- Click the green **Add** button (OR) under Things I Can Do, click Add Document

ABC Company - Manufacturing(2)  
Mr. Mark M. Jackson - 152251252

UltiPro by ULTIMATE SOFTWARE

Mr. Mark M. Jackson

Personal Jobs Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Employee Documents

Employee Documents

add delete print help

Things I Can Do

FOR THIS PAGE  
Add Document

Find by Category is Search

Document View	Document Title	Category	Uploaded By	Date Added	Expiration Date	Viewable By Employee	Notes	Delete
No records found								

- The Add/Change Document screen appears

Tommie Anne Ruble - 010259 - Larimer County - Google Chrome

Secure | https://nw12.ultipro.com/DefaultChild.aspx?USParams=pageName=DefaultChild.aspx&cid=P6U9R!country=USA!currentpage=1!leid=...

Larimer County  
Tommie Anne Ruble - 010259

Tommie Anne Ruble

Personal Jobs Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Employee Documents

Add/Change Document

save cancel print help

Document \* Choose File No file chosen  
File types supported: doc, docx, pptx, ppt, xlsx, xls, xlt, xltx, txt, rtf, tif, png, jpg, jpeg, gif, bmp, pdf, mht, db, zip, xml, log, dpt, odt, ods

Document Title \*

Category \*

Expiration Date MM/DD/YYYY

Viewable by Employee

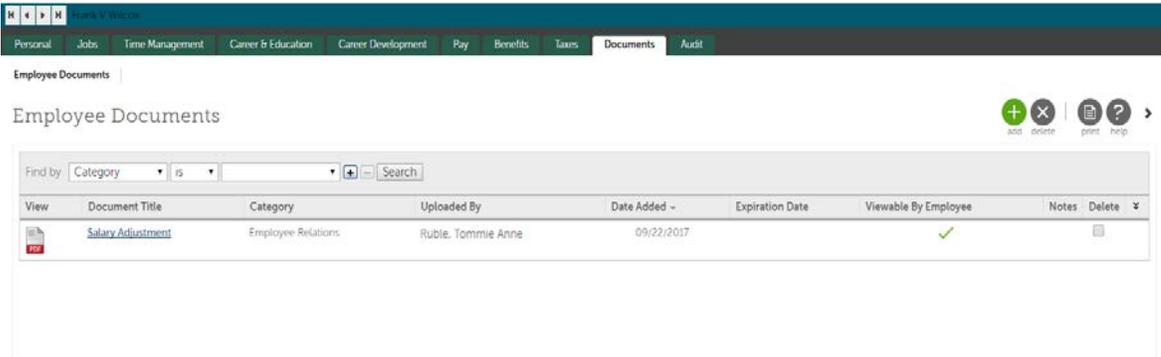
Notes

- Complete fields (**fields with a red dot are required fields**)
  - *Document*: Click the Browse button and choose the File you wish to upload
  - *Document Title*: Type the document title (ex: Resignation Letter)
  - *Category*: Choose a document category from the drop-down list
  - *Expiration Date*: Enter if appropriate; otherwise leave blank
  - *Viewable by Employee box*: Check to give the employee the ability to view the document
  - *Notes*: Enter additional info, as desired



- Click the green SAVE button on upper right (  )

- The document will then show under Employee Documents







## MAKING CORRECTIONS

- Click Menu~My Team~My Employees
- If you have a Role box on the upper left, select Payroll Rep
- Search by Last Name or Employee ID and select the desired employee
- Go to the “Jobs” tab and click on the “Job History” sub-tab

ABC Company(2)  
Mr. Blaine M. Sawyer - 000000043

UltiPro by ULTIMATE SOFTWARE

Mr. Blaine M. Sawyer

Personal | **Jobs** | Time Management | Career & Education | Career Development | Pay | Benefits | Documents

Job Summary | Compensation | Compensation Plans | Variable Pay | Organization | Work Location | **Job History** | Contracts | Allocations | Reviews | Workers' Compensation | Other Company Info

Job History

History type: All

Find by: Date range From MM/DD/YYYY To MM/DD/YYYY Search

Effective	Job	Status	Reason	Pay Frequency	Hourly/Salaried	Type	Viewable By Employee	Notes
12/15/2002	CLERK1 - Clerk Level 1	Active	Merit Increase	Weekly	Hourly	Regular	✓	
12/30/2001	CLERK1 - Clerk Level 1	Active	Merit Increase	Weekly	Hourly	Regular	✓	
04/19/1999	CLERK1 - Clerk Level 1	Active	Change in Supervisor	Weekly	Hourly	Regular	✓	
01/01/1997	CLERK1 - Clerk Level 1	Active	New hire	Weekly	Hourly	Regular	✓	

Things I Can Do

FOR THIS PAGE  
[Add Employee Job History](#)

FOR THIS TAB SET  
[Change Job](#)  
[Add Secondary Jobs](#)  
[Change Job and Salary](#)  
[Change Salary](#)  
[Request One-Time Payout](#)  
[Change Variable Pay](#)  
[Change Organization](#)  
[Add Work Location \(USA\)](#)  
[Add Employment Contracts](#)  
[Add Employee Labor Allocations](#)

- Click on the Effective Date link for the action you wish to correct.
- The selected employee action will appear in a new screen
- Click the “Correct” button on the upper right

Mr. James M. Bana - 000000068 - ABC Company(2) - Google Chrome

Secure | https://et11.ultiopro.com/DefaultChild.aspx?U5Params=pageName=DefaultChild.aspx?coId=HDLBXIcountry=USAI...

ABC Company(2)  
Mr. James M. Bana - 000000068

UltiPro by ULTIMATE SOFTWARE

Mr. James M. Bana

Personal | **Jobs** | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes

Job Summary | Compensation | Compensation Plans | Variable Pay | Organization | Work Location | **Job History**

MGRPER - HR Manager

edit labels | back | **correct** | print | help

Viewable by Employee

Job

Effective: 05/07/2014  
Reason: 301 - Reclassification  
Job: MGRPER - HR Manager  
Salary grade: 204 - Tech 2  
FLSA: Management (no longer valid)  
Workers' compensation: 8810 - Administrative

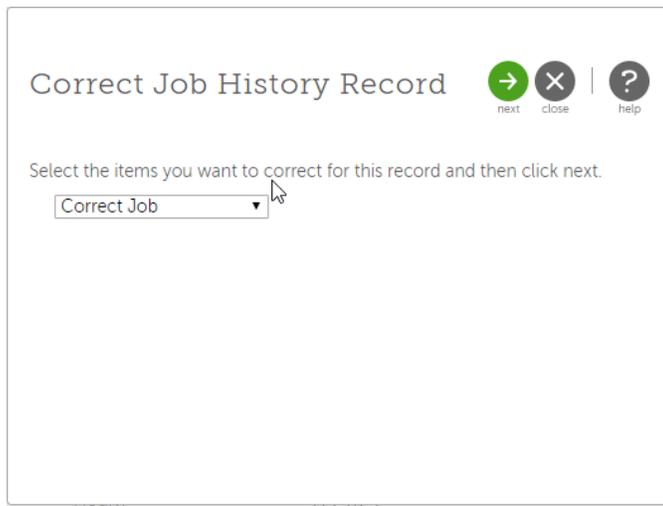
Payroll

Pay group: CORPBI - Corporate - Biweekly  
Pay frequency: B - Biweekly

Things I Can Do

FOR THIS TAB SET  
[Change Job](#)  
[Change Job and Salary](#)  
[Add Secondary Jobs](#)  
[Change Salary](#)  
[Request One-Time Payout](#)  
[Change Variable Pay](#)  
[Change Organization](#)  
[Add Work Location \(USA\)](#)  
[Add Employee Job History](#)  
[Add Employment](#)

- The Correct Job History Record screen appears



- Select the action to correct from the drop-down list
- Click on the green Next button on the upper right
- The Correct Job screen appears

- Make desired changes to fields
- When finished, click the Save button. (  )
- A Workflow Approval message will appear.
- Click the Submit button. (  )



## COSTING CHANGE

- Click MENU~ My Team~My Employees
- If you have a Role box on the upper left, select Payroll Rep
- In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click Search

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- The selected employees will appear in the list
- Click on the desired employee to go to his/her record.
- Click on the Jobs tab and the Organization sub-tab

Job Summary

Job	5134 - Department Spec II
Regular Position or Limited Term	
Elected, Appointed, or Neither (N/A)	
Date in job	02/07/2013
Time in job	4 years 9 months
Salary grade	402 - 402

- The Organization screen appears.
- Click the Edit button.

Larimer County  
Dee Marina Schmidt - 061620

Dee Marina Schmidt

Personal | **Jobs** | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes | Documents | Audit

Job Summary | Compensation | Variable Pay | **Organization** | Work Location | Job History | Allocations | Reviews | Workers' Compensation | Other Company

### Organization

Effective date	02/07/2013
Reason	100 - New hire
Supervisor	Nicholas A Cole
Location	F2000 - FC 200 W Oak
Project	00000000 - None
Home company	Larimer County
Time clock	
DIVISIONS	ACMDIV - BCC Assit County Manager
DEPARTMENTS	HRDSRV - HRD Services

edit print help

Things I Can Do

FOR THIS PAGE  
[Change Organization](#)

FOR THIS TAB SET  
[Change Job](#)  
[Change Job and Salary](#)  
[Add Secondary Jobs](#)  
[Change Salary](#)  
[Change Variable Pay](#)  
[Add Work Location \(USA\)](#)  
[Add Employee Job History](#)  
[Add Employee Labor Allocations](#)

- The Change Organization screen appears.

Larimer County  
Dee Marina Schmidt - 061620

Dee Marina Schmidt

Personal | **Jobs** | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes | Documents

Job Summary | Compensation | Variable Pay | **Organization** | Work Location | Job History | Allocations | Reviews | Workers' C

### Change Organization

save reset cancel print help

Effective	MM/DD/YYYY
Reason	
Supervisor	Nicholas A Cole
Location	F2000 - FC 200 W Oak
Project	00000000 - None
Home company	Larimer County
Time clock	
DIVISIONS	ACMDIV - BCC Assit County Manager
DEPARTMENTS	HRDSRV - HRD Services
FUND and ORG	HRADMN - HR 101.110950
GL LOCATIONS	NONE - 000 Location Code

Things I Can Do

FOR THIS TAB SET  
[Change Job](#)  
[Change Job and Salary](#)  
[Add Secondary Jobs](#)  
[Change Salary](#)  
[Change Variable Pay](#)  
[Change Organization](#)  
[Add Work Location \(USA\)](#)  
[Add Employee Job History](#)  
[Add Employee Labor Allocations](#)  
[Add Review History](#)  
[Change Workers' Compensation](#)  
[Change Other Company Information](#)

- Complete the necessary fields:
  - Effective Date*: Enter the effective date.
  - Reason*: Select the reason from the drop-down list (402-Costing Change)
  - Project*: Select the appropriate project code
  - DIVISIONS*: Select the Division code
  - DEPARTMENTS*: Select the Department
  - FUND and ORG*: Select the Fund/Org code
  - GL LOCATIONS*: Select the Location Code

- Click the green SAVE button in the upper right (  )

- A Workflow Approval message will appear.

- Click the Submit button. (  )

## TO SPLIT COSTING FOR AN EMPLOYEE:

- Click on the Jobs tab and the Allocations sub-tab

Larimer County  
Tommie Anne Ruble - 010259

Personal **Jobs** Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Job Summary Compensation Variable Pay Organization Work Location Job History **Allocations** Reviews Workers' Compensation Other Company Info

### Allocations

Auto Allocate Employee

Edit	Primary	Allocation	FUND And ORG	GL LOCATIONS	Project	Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100.00 %	HR 101 110951	000 Location Code	None	
<b>Total</b>		100.00 %				

Things I Can Do

FOR THIS PAGE  
[Add Employee Labor Allocations](#)

FOR THIS TAB SET  
[Change Job](#)  
[Change Job and Salary](#)  
[Add Secondary Jobs](#)  
[Change Salary](#)  
[Change Variable Pay](#)  
[Change Organization](#)  
[Add Work Location \(USA\)](#)  
[Add Employee Job History](#)  
[Add Review History](#)  
[Change Workers' Compensation](#)

- Click the Auto Allocate Employee box and **click the save button** (  )  
(this will enable the Add button)

Larimer County  
Tommie Anne Ruble - 010259

Personal **Jobs** Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Job Summary Compensation Variable Pay Organization Work Location Job History **Allocations** Reviews Workers' Compensation Other Company Info

### Allocations

Auto Allocate Employee

Edit	Primary	Allocation	FUND And ORG	GL LOCATIONS	Project	Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100.00 %	HR 101 110951	000 Location Code	None	
<b>Total</b>		100.00 %				

Things I Can Do

FOR THIS PAGE  
[Add Employee Labor Allocations](#)

FOR THIS TAB SET  
[Change Job](#)  
[Change Job and Salary](#)  
[Add Secondary Jobs](#)  
[Change Salary](#)  
[Change Variable Pay](#)  
[Change Organization](#)  
[Add Work Location \(USA\)](#)  
[Add Review History](#)  
[Change Workers' Compensation](#)

- Click the Add button.
- The Allocation entry screen appears.
- Complete the fields as follows:



Navigation: Personal | **Jobs** | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes | Documents | Audit

Sub-navigation: Job Summary | Compensation | Variable Pay | Organization | Work Location | Job History | **Allocations** | Reviews | Workers' Compensation | Other Company Info

### Allocations

Allocation:

FUND and ORG:

GL LOCATIONS:

Project:

Primary	Allocation	FUND And ORG	GL LOCATIONS	Project
<input checked="" type="checkbox"/>	100.00 %	HR 101 110951	000 Location Code	None
<b>Total</b>	100.00 %			

FOR THIS TAB SET

- [Change Job](#)
- [Change Job and Salary](#)
- [Add Secondary Jobs](#)
- [Change Salary](#)
- [Change Variable Pay](#)
- [Change Organization](#)
- [Add Work Location \(USA\)](#)
- [Add Employee Job History](#)
- [Add Employee Labor Allocations](#)
- [Add Review History](#)
- [Change Workers' Compensation](#)
- [Change Other Company](#)

- *Allocation*: Enter the % of the costing you are about to add
- *FUND and ORG*: Select from the drop-down list
- *GL LOCATIONS*: Select from the drop-down list
- *Project*: Select from the drop-down list



- When finished, click the Save button (  )
  - The costing will appear in the list. The original costing string percentage will adjust accordingly (ex: if the original costing string was 100%, adding the 2<sup>nd</sup> string at 50% will change the original string to 50% also).

- Make additional changes/additions as necessary



- When finished with all splits, click the SAVE button (  )



- If a Workflow Approval message appears, click the Submit button. (  )



## EVALUATION ONLY

- Click MENU~ My Team~ My Employees
- If you have a Role box on the upper left, select Payroll Rep
- In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields
  - Click “Search”

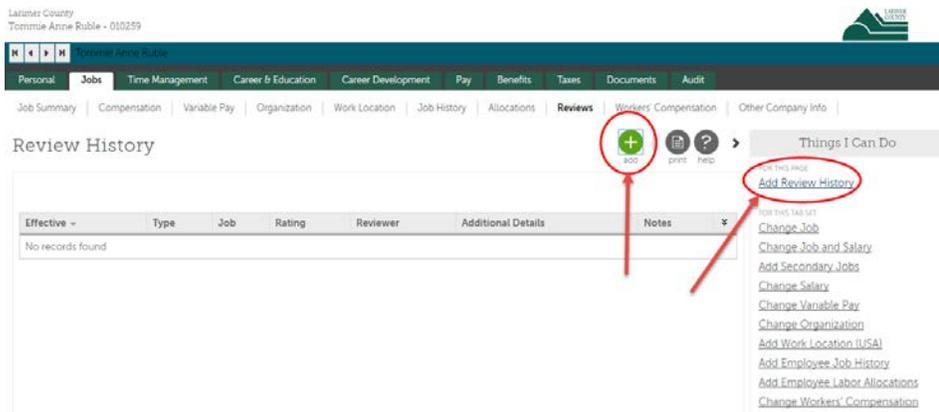
Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
Jackson, Mark M.	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
Jackson, Mark M.	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
Jackson, Richard R.	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
Jackson, Susan D.	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

- The employees will appear in the list
- Click on the desired employee to go to his/her record
- Click on the “Jobs” tab and the “Reviews sub-tab.

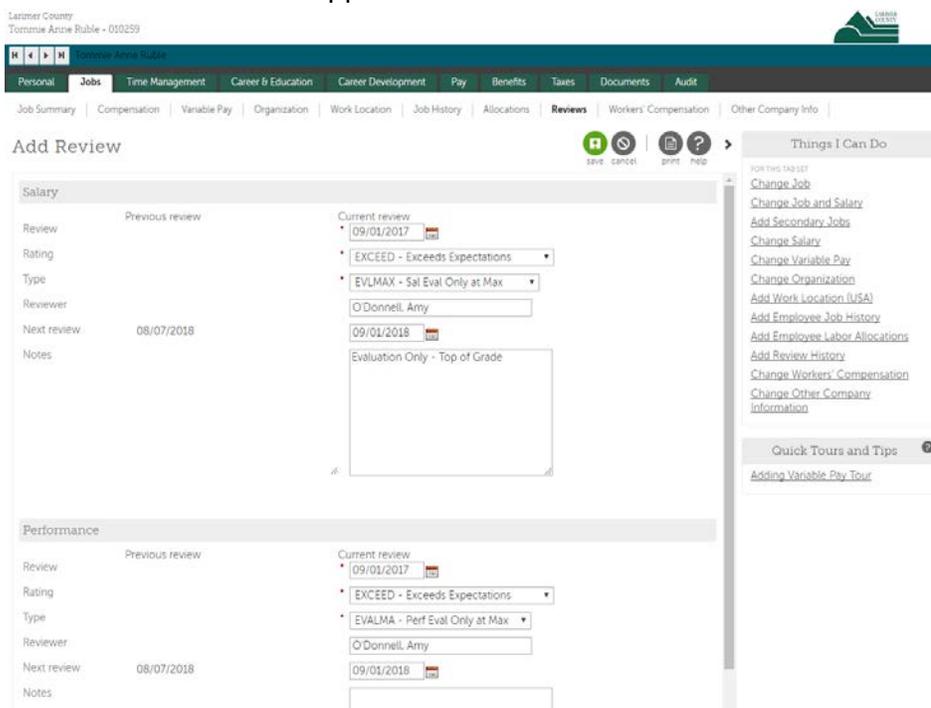
Job Summary

Job	500096 - Payroll Spec
Regular Position or Limited Term	
Elected, Appointed, or Neither (N/A)	
Date in job	03/25/2002
Time in job	15 years 7 months 13 days
Salary grade	404 - 404
Pay group	BIWEEK - BIWeekly

- Click the Add button on the upper right (OR) under Things I Can Do, click on “Add Review History”



- The Add Review screen appears



- **NOTE:** UltiPro separates Salary Review and Performance Review. Even though this is an Evaluation Only, you need to enter a Salary Rating and Type in the Salary section in order to have the Next Review date change.
  - Enter Salary info:
    - *Current review:* Enter the effective date of the review
    - *Rating:* Select the appropriate rating from the drop-down list
    - *Type:* Select the appropriate type (for an Eval Only, choose either “EVLMAX – Sal Eval-At Max”, or “PROBN - Sal Eval-End Probation”
    - *Reviewer:* Type the reviewer’s name (Last name, First name)
    - *Next review:* Enter the next review date
    - *Notes:* Type any additional info about this action

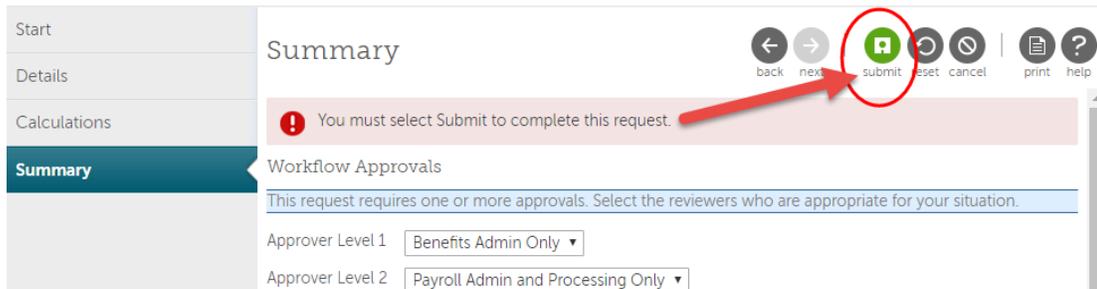
- Enter Performance info:
  - *Current review:* Enter the effective date of the review
  - *Rating:* Select the appropriate rating from the drop-down list
  - *Type:* Select the appropriate type (for an Eval Only, choose either “EVALMA – Perf Eval-At Max”, or “PROB – Perf Eval-End Probation”)
  - *Reviewer:* Type the reviewer’s name (Last name, First name)
  - *Next review:* Enter the next review date
  - *Notes:* Type any additional info about this action

- Check all information for accuracy.



- When finished, click  .

- A Workflow Approval message may appear.

A screenshot of a software interface showing a "Summary" page. On the left is a navigation menu with "Summary" selected. The main content area has a "Summary" header and a red error message: "You must select Submit to complete this request." Below this is a "Workflow Approvals" section with a blue instruction: "This request requires one or more approvals. Select the reviewers who are appropriate for your situation." There are two dropdown menus for "Approver Level 1" (set to "Benefits Admin Only") and "Approver Level 2" (set to "Payroll Admin and Processing Only"). At the top right, a toolbar contains buttons for "back", "next", "submit", "reset", "cancel", "print", and "help". The "submit" button is circled in red, and a red arrow points from the error message to it.

- Click the Submit button. (  )





# HOURS CHANGE

- Click MENU~ My Team ~ My Employees
- If you have a Role box on the upper left, select Payroll Rep
- In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click “Search”

My Employees

Find by: Last name starts with j Search

Filtered by: Last name - starts with j [Clear Filters]

Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
Jackson, Mark M.	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
Jackson, Mark M.	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
Jackson, Richard R.	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
Jackson, Susan D.	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

- The selected employee will appear in the list. Click on the desired employee to go to his/her record.
- Click on the Jobs tab and the Compensation sub-tab

Dee Marina Schmidt - 061620 - Larimer County - Google Chrome

Secure | https://nw12.ultipro.com/DefaultChild.aspx?USParams=pageName=DefaultChild.aspx&icoId=PGU9R1&country=USA&currentpa...

Larimer County  
Dee Marina Schmidt - 061620

Personal Jobs Time Management **Compensation** Career & Education Career Development Pay Benefits Taxes Document

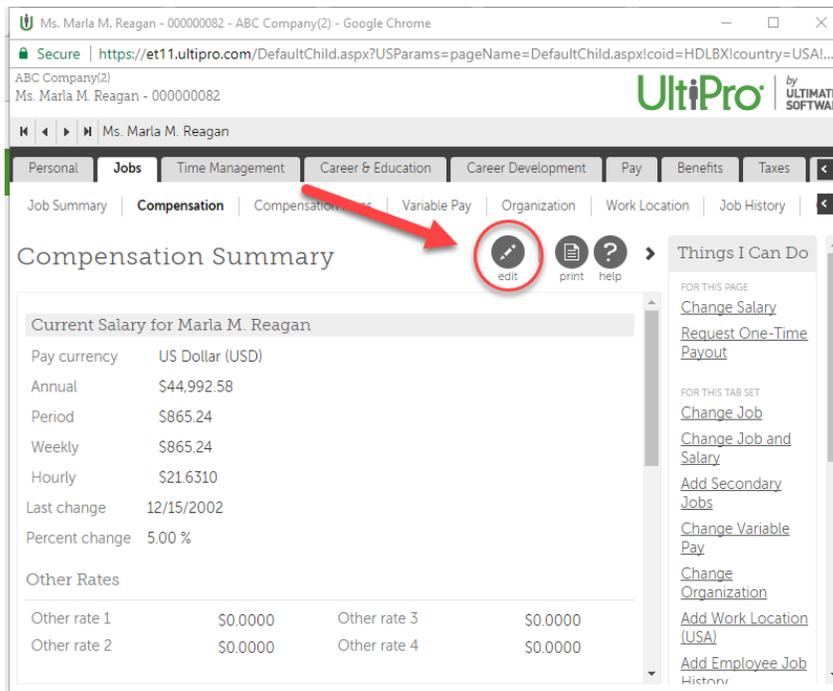
Job Summary Compensation Variable Pay Organization Work Location Job History Allocations Reviews Worker

Job Summary

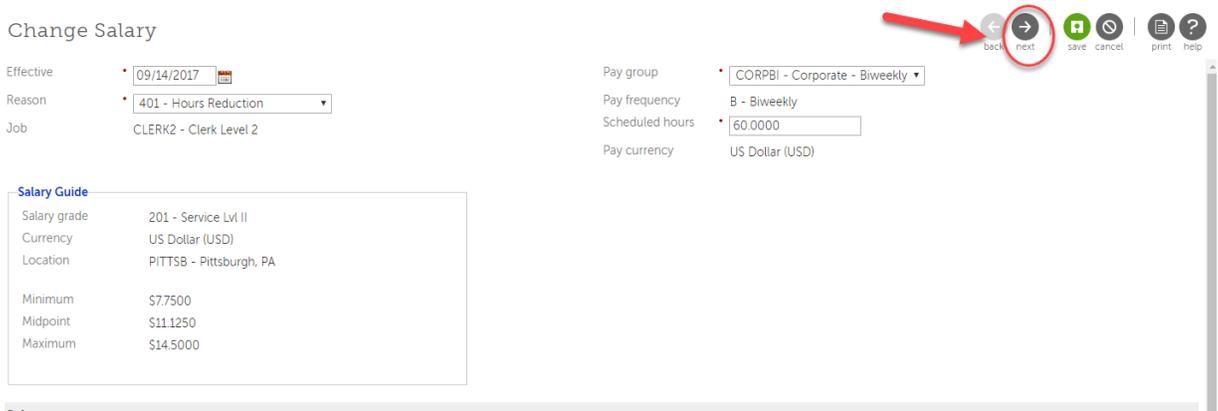
Primary Job

Job	5134 - Department Spec II
Alternate title	
Date in job	02/07/2013
Time in job	4 years 7 months 19 days
Salary grade	402 - 402
Pay group	BIWEEK - BIWeekly
Pay frequency	Biweekly
Hourly/Salaried	Hourly
Seasonal	<input type="checkbox"/>
Agricultural	<input type="checkbox"/>
Youth/Training	<input type="checkbox"/>
Direct labor	<input type="checkbox"/>
Send with current new hire file	<input type="checkbox"/>

- Click on the EDIT button (upper right)



- The Change Salary screen appears.



- Complete the necessary fields:
  - *Effective Date*: Enter the effective date of the Hours Change.
  - *Reason*: Select the reason from the drop-down list ( 400 – Hours Increase or 401 – Hours Reduction )
  - *Scheduled Hours*: Enter new total hours for the biweekly period.
- Click the Next button on upper right.
- The Change Review Panel appears.
  - ***Leave this screen blank since there are no changes to salary or performance review dates with an Hours Change action.***

- Click on the Next button.

Change Review

Salary

Review: Previous review 12/15/2002, Current review MM/DD/YYYY

Rating: SAT - Satisfactory

Type: Salary

Reviewer: Julie Austin

Next review: 12/15/2003

Performance

Review: Previous review 12/15/2002, Current review MM/DD/YYYY

Rating: SAT - Satisfactory

Type: Performance

Reviewer: Julie Austin

Next review: 12/15/2003

- The Summary screen appears.

Change Salary - Google Chrome

Secure | https://et11.ultiopro.com/pages/edit/SubmitProcess.aspx?USParams=coid=HDLBXIcountry=USAteiid=BFACM907N080pk=EEADM1role=PRADMININewJobUsesPayScales=NISessionID=66568...

Change Salary  
Ms. Yamira M. Cazes - 326738918 - ABC Company(2)

Summary

Request Information

Warning  
Hourly rate is greater than the maximum for this salary grade.

Change Salary

	Before	Submitted
Effective date		09/14/2017
Reason	300 - Promotion	401 - Hours Reduction
Scheduled hours	80.0000	60.0000
Weekly pay rate	\$899.01	\$674.26
Period pay rate	\$1,798.03	\$1,348.52
Annual salary	\$46,748.67	\$35,061.47

- Review all changes (click the Show box and choose Changed Fields to see only the fields that have been changed).
- To make changes, click the Back button and make the necessary edits. Then click Next to return to the Summary screen.



- When finished, click the green SAVE button in the upper right. ( save )

- A Workflow Approval message may appear.

Summary

You must select Submit to complete this request.

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1: Benefits Admin Only

Approver Level 2: Payroll Admin and Processing Only



- Click the Submit button. ( submit )





## NEW HIRES

- Click MENU~ My Team~ My Employees
- If you have a Role box on the upper left, select Payroll Rep
- The My Employees screen appears.
- On the right side of the screen, under “Things I Can Do”, select “Add Employee (Hire/Rehire)” (OR) Click the green “Add” button.

The screenshot shows the UltiPro interface for 'My Employees'. At the top, there is a navigation bar with 'MENU' and 'Administration Employee Admin'. The main navigation bar includes 'Administrator Guide', 'My Employees', 'Employee Contracts', 'Third Party Pay', 'Organization Views', 'PTO Requests', and 'Process Hires'. A search bar is visible on the right. Below the navigation, the 'My Employees' section has a search area with 'Find by Last name' and 'starts with' dropdowns, and a search button. Below the search area is an 'Actions' section with a dropdown menu and 'OK' and 'Print' buttons. A table header is visible with columns: Name, Employee Number, Primary Work Phone, Extension, Status, Job, Location, and Division. Below the table is a text input field for 'Find by criteria'. On the right side, there is a 'Things I Can Do' sidebar with a red circle around the 'add' button and another red circle around the 'Add Employee (Hire/Rehire)' option. Below this sidebar is a 'Quick Tours and Tips' section with several links.

- The Hire an Employee screen appears.
- Ultipro will lead you through the series of screens listed on the left side.
- Fill in the fields on each screen as necessary (**fields with a red dot are required fields**).
- Click Next to get to the next screen.



○ **START:**

- **Company:** Click the drop-down list to select the appropriate company.  
NOTE: HR Only is for people who will be given system access but are not employees and will not be paid by us (ex: contingent workers, Sheriff's Posse, etc.)
- **SSN:** Type in the employee's social security number – no dashes. Enter carefully and check to the employee's SS card!
- **Confirm SSN:** Retype SS number
- **Names:** Enter Name fields as indicated (First and Last names are required)
- **Employee Number:** Enter a 6-digit employee number (**during Dual Entry, enter the ADP number with 0's in front, ex: if the ADP number was 212, enter 000212**). Once we go live with UltiPro, the employee number will autofill from the iCIMS feed.
- **Time Clock:** Leave blank
- Click the Next button (  ) to go to the next screen



Start

**Personal**

Dates

Jobs/Payroll

Time Management

Direct Deposit

Federal Income Tax

State Taxes

Local Taxes

PTO/Leave Balances

Summary

### Personal

back next print help

**Address**

Address

Address Line 2

City

State/Province

Zip/Postal code

County

**Phone/E-Mail**

Home phone

Work phone

Other

Other type

Primary e-mail

Alternate e-mail

**Additional Information**

Date of birth

Gender

Marital status

Ethnic origin

I-9 verification

○ PERSONAL:

- **Address:** Enter address, city, state and zip code in appropriate fields
- **Phone/Email:** Enter phone numbers and email addresses in fields  
**NOTE: The Primary e-mail will become the employee's User ID for signing in to UltiPro and the address to which work-flowed information will go. Use a county email address whenever possible. If the employee doesn't have a county email, use his/her personal email. If the Primary e-mail address changes, notify Human Resources so they can change the User ID also.**
  
- **Additional Information:**
  - Enter appropriate info in each field
  - **Marital Status:** Leave blank. The Benefits staff will fill in if necessary.
  - **I-9 verification:** Select "Yes" from drop-down list
- Click the Next button (  ) to go to the next screen



Start

Personal

**Dates**

Jobs/Payroll

Time Management

Direct Deposit

Federal Income Tax

State Taxes

Local Taxes

PTO/Leave Balances

Summary

## Dates

Employment Dates

Hire date

Seniority

Benefit seniority

Next Review Dates

Salary

Performance

back next | print help

o DATES:

▪ Employment Dates:

- **\*Hire date:** Enter the new hire effective date
- **\*Seniority:** Date will autofill from new hire date; leave as is
- **\*Benefit Seniority Date:** Date will autofill from new hire date; leave as is

▪ Next Review Dates:

- **Salary:** Date autofills one year from hire date; adjust as necessary
- **Performance:** Date autofills 180 days from hire date; adjust as necessary
- **NOTE:** For temporary employees, remove the review dates and leave these fields blank

- Click the Next button (  ) to go to the next screen



Start

Personal

Dates

**Jobs/Payroll**

Time Management

Direct Deposit

Federal Income Tax

State Taxes

Local Taxes

PTO/Leave Balances

Summary

### Jobs/Payroll

Supervisor

Job group

Alpha Job Lookup List

Job

Elected, Appointed, or Neither (N/A)

Location

State of employment

Hire source

Project

DIVISIONS

DEPARTMENTS

FUND and ORG

GL LOCATIONS

Health Care Measurement Group

Appointing Authority

HR Generalist

---

#### Payroll Information

Pay rate  per

Other rate 1

Other rate 2

Other rate 3

Other rate 4

Pay group

Pay frequency

Distribution center

Scheduled hours

Earnings group

Deduction/Benefit group

1095-C Deduction Group Assignment Date

Employee type

Regular Position or Limited Term

Hourly/Salaried

Full/Part time

Pay automatically

back next save reset cancel print help

○ JOBS/PAYROLL:

▪ Job Information:

- **Supervisor:** Click the Finder icon and a pop-up box appears. Enter the supervisor's last name in the Find by box, click Search. Double click the name in the list and it will fill the field.
- **Job Group:** Skip this field
- **Alpha Job Lookup List:** Type the first few letters of the Job title and all jobs that contain those letters will appear. Make note of the desired job number to enter in the Job field below.
- **\*Job:** Click the drop-down arrow and select the job number/name from the list (jobs are in numerical order so use the job number you found in the field above to help locate the job).
- **Elected, Appointed, or Neither:** Select the appropriate status
- If a Sheriff's Department sworn job was selected, the following fields will appear:
  - **Pay scale:** Select from the drop-down list
  - **Salary Step:** Select from the drop-down list
- **\*Location:** Select location from drop-down list
- **State of Employment:** This field will auto-fill once a location is chosen.

- *Hire Source*: Skip this field
  - *Project*: Select the Project from the drop-down list
  - *DIVISIONS*: Select the Division code from the drop-down list
  - *DEPARTMENTS*: Select from the drop-down list
  - *FUND and ORG*: Select from the drop-down list
  - *GL LOCATIONS*: Select from the drop-down list
  - *Health Care Measurement Group*: Leave blank
  - *Appointing Authority*: Select from the drop-down list
  - *HR Generalist*: Select from the drop-down list
- Payroll Information:
- **Salary Guide** shows salary grade and range for this job
  - **NOTE**: For Sheriff's Dept. sworn jobs, the Salary Guide will not appear.
  - **\*Pay rate**: Enter pay rate PER HOUR (for **all** employees, *including Exempt*)
  - *Other rates*: Leave blank
  - **\*Pay group**: Select from drop-down list
  - *Distribution center*: Select "LARCO – Larimer County"
  - **\*Scheduled hours**: Enter the scheduled hours for the two-week pay period (ex: for full time, enter 80 hours)
  - **\*Earnings group**: Select from drop-down list
  - **\*Deduction/Benefit group**: Select from drop-down list (**FOR TEMPORARY EMPLOYEES CHOOSE NO BENEFITS/TEMPORARY**)
  - *1095-C Deduction Group Assnt Date*: Leave blank
  - **\*Employee type**: Select from drop-down list (For temps, select "TMP-Temporary Employee")
  - *Regular Position or Limited Term*: Select from drop-down list
  - **\*Hourly/Salaried**: **Select Hourly for ALL employees, including Exempts. (Nonexempt & Exempt status is set up at the job level)**
  - **\*Full/Part time**: Select from drop-down list
  - *Pay automatically*: Leave box unchecked
- Click the Next button (  ) to go to the next screen

- TIME MANAGEMENT:
  - This section is not yet set up. Skip this screen during Dual Entry.

- Click the Next button (  ) to go to the next screen

- DIRECT DEPOSIT:
  - Click on the “add” button at top of screen to add new accounts
  - The Direct Deposit Detail screen appears

Selected	Account Type	Bank	Account Number	Amount	
No records found					

- Fill in all bank account information
- **\*Amount:** If *all* pay will go to this account, click *Available balance*.  
If pay will be split between accounts, click *Flat Amount* or *Percent amount* and enter amount or % to go to this account.
- Click the Next button (  ) to go to the next screen
- The Bank Account information will appear in the Direct Deposit list

Account Number	Bank	Account Type	Amount	Status	
xxxxxxxxxxxxxxxxxxxxxxxx2220	First National	Checking	Available balance	Active	

- To add another account, click the Add button again and complete the Direct Deposit Detail screen for the additional account

- Then click “Next” to return to this screen and view both accounts in the list
- Add additional accounts as necessary
- Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - ABC Company(2)

UltiPro<sup>®</sup> by ULTIMATE SOFTWARE

Start  
Personal  
Dates  
Jobs/Payroll  
Time Management  
Direct Deposit  
**Federal Income Tax**  
State Taxes  
Local Taxes  
PTO/Leave Balances  
Summary

Federal Income Tax

Federal Taxes (Form W-4)

Filing status: SINGLE

Total allowances claimed: 0

Additional amount withheld each paycheck: \$0.00

Employee claims exemption from withholding (blocked)  
 Employee has a Federal lock-in letter

Backup Withholding (Form W-9)

Payee is subject to backup withholding

W-2 Reporting

Pension

back next save reset cancel print help

○ FEDERAL INCOME TAX

- Enter the following information from the employee’s W-4 form in the appropriate fields:
  - Filing status
  - Total allowances claimed
  - Additional amount to be withheld (if any)
- Do not check any of the boxes *unless...*
  - If the employee is claiming exemption from withholding, check the *Employee claims exemption* box. If claiming exemption, do not enter any allowances
- Click the Next button (  ) to go to the next screen

Hire an Employee - Google Chrome  
Secure | https://et11.ultipro.com/pages/EDIT/EEAdminTaxState.aspx?USParams=PK=EEADM!MenuID=424!ParentRerId=425!SubDivRerId=674!mode=addoriginati...

Hire an Employee  
John Jones - ABC Company(2)

State Taxes

State: Colorado

Filing status: SINGLE

Total allowances claimed: 1

Additional amount withheld each paycheck: \$0.00

Employee claims exemption from withholding (blocked)

Employee has a lock-in letter for this jurisdiction

Navigation: back, next, save, reset, cancel, print, help

○ STATE INCOME TAX

- Enter the following information from the employee's W-4 form in the appropriate fields:
  - Filing status
  - Total allowances claimed
  - Additional amount to be withheld (if any)
  
- Do not check any of the boxes *unless...*
  - If the employee is claiming exemption from withholding, check the *Employee claims exemption* box. If claiming exemption, do not enter any allowances
  
- Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - ABC Company(2)



Start

Personal

Dates

Jobs/Payroll

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Federal Income Tax

State Taxes

Local Taxes

**PTO/Leave Balances**

Summary

### PTO/Leave Balances

back next add save reset cancel print help

Plan	Available	Hours/Wages	Earned Through	Reset
No records found				

- PTO/LEAVE BALANCES:
  - LEAVE BALANCES WILL NOT BE MAINTAINED IN ULTIPTRO UNTIL GO-LIVE
  - Some balances have been loaded to allow us to run sample payrolls and to learn the system, but these will be deleted prior to loading accurate balances in December
  - Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - ABC Company(2)



Summary

Request Information

Show All fields

	Before	Submitted
Company	New	ABC Company(2)
Operating country	New	United States
Prefix	New	
First	New	John
Preferred name	New	John
Middle	New	James
Last	New	Jones
Former last	New	
Suffix	New	
Employee number	New	To be assigned
Time clock	New	

Personal

	Before	Submitted
Country	New	United States
Address	New	123 Elm St
Address Line 2	New	
City	New	Fort Collins
State/Province	New	Colorado
Zip/Postal code	New	80521

○ SUMMARY:

- A warning will appear if the pay rate is outside the pay range for the assigned job.
- Check all fields here for accuracy
- Click “back” to return to previous screens for editing



- When all information appears correct, click the green SAVE button (  )

- A Workflow Approval message will appear.

Summary

back next submit reset cancel print help

 You must select Submit to complete this request.

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1 Benefits Admin Only

Approver Level 2 Payroll Admin and Processing Only



- Click the Submit button. (  )

- **FINAL STEPS:**

- Once the new hire is saved, you will be returned to the “My Employees” screen.
- To find the employee you just added:
  - In the Find by box, select “Last name”
  - Select “is”
  - Type the new hire’s last name and click Search
  - The new hire will appear in the list

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- Click on the new hire’s name to go directly to his/her record

ABC Company(2)  
John James Jones - 123333332

John James Jones

Personal | Jobs | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes | Documents | Audit

Employee Summary | Name, Address, and Telephone | Status/Key Dates | Property | Contacts | Private Info | Identification Documents | Termination Info | Other Personal Info

**John J Jones**  
Admin Assistant 2 (970) 232-2233 johnjones@gmail.com

Personal Information

Name	John James Jones	Primary e-mail	johnjones@gmail.com
Preferred	John	Alternate e-mail	
Employee number	123333332	Mailstop	
Time clock		Primary Home Phone	(970) 232-2233
Address	123 Elm St Fort Collins, CO 80521 United States	Primary Work Phone	
Company		Work extension	

Things I Can Do

FOR THIS PAGE

- [Change National ID \(SSN/SIN\)](#)
- [Manage Employee Photo](#)

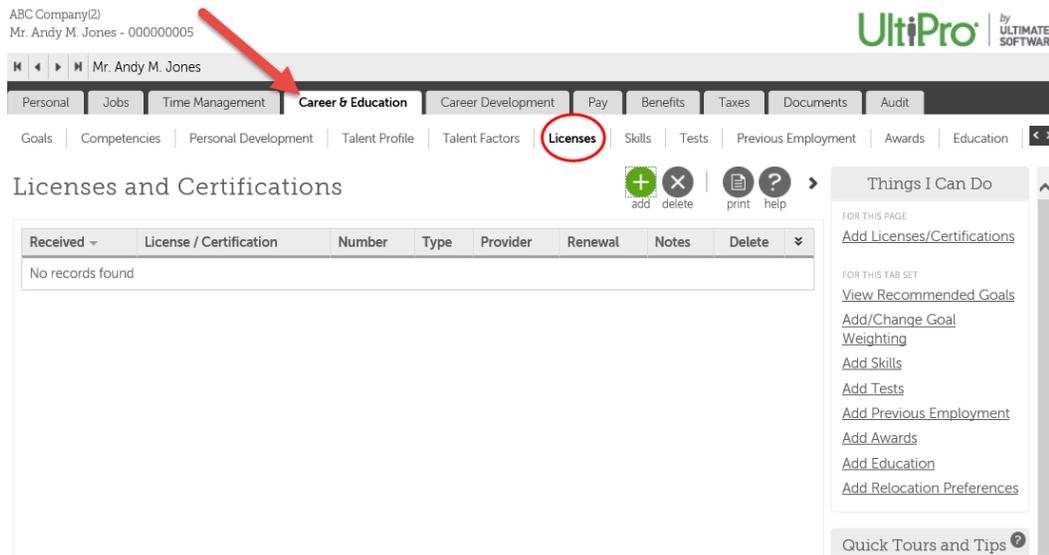
FOR THIS TAB SET

- [Change Name, Address, or Telephone](#)
- [Add Alternate Phone Number](#)
- [View Status History](#)
- [Change Status](#)
- [Add Company Property](#)
- [Add Contact](#)
- [Change Private Information](#)
- [Change I-9](#)
- [Add Identification Document](#)
- [Terminate Employee](#)
- [Transfer Employee](#)
- [Change Other Personal Information](#)

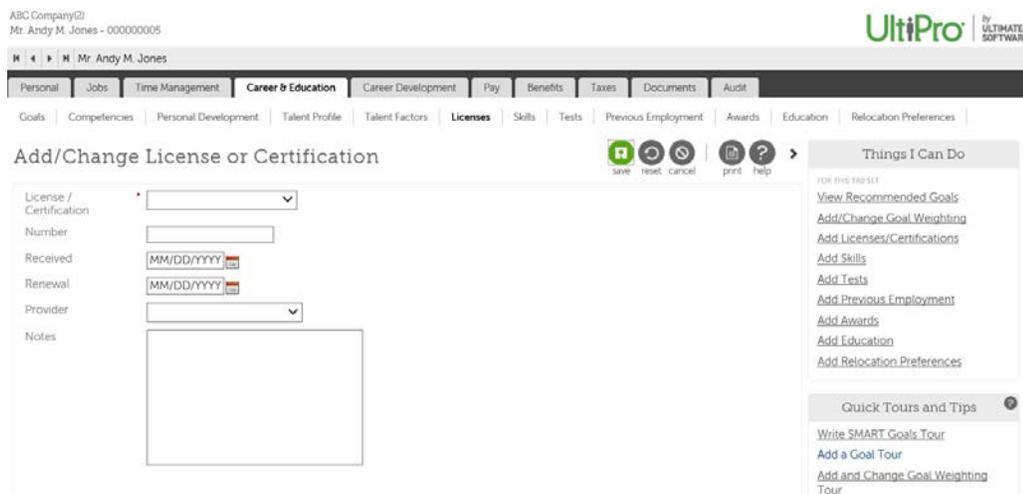
Quick Tours and Tips

- [Human Resources – Resources for Employee Administrators](#)
- [Terminate an Employee Tour](#)
- [Transfer an Employee Tour](#)

- To add Driver's License information for the new employee, click on the Career & Education tab and the Licenses sub-tab



- Click the green Add button on the upper right (OR) under Things I Can Do, click on Add Licenses/Certifications



- Complete all fields:
  - *License/Certification*: Select license type from drop-down list
  - *Number*: Enter the Driver's License number, including dashes
  - *Received*: Enter the Issued date
  - *Renewal*: Enter the Expiration date
  - *Provider*: Select the State that issued the license
  - *Notes*: Type additional information, if desired



- Click the green SAVE button ( **save** ) in the upper right corner
- A Workflow Approval message may appear.



- Click the Submit button. ( **submit** )



## MERITS

- Click MENU~ My Team~ My Employees
- If you have a Role box on the upper left, select Payroll Rep
- In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click “Search”

Administration Employee Admin

UltiPro by ULTIMATE SOFTWARE

Paula Joyas | To Do | Help | Logout

Administrator Guide My Employees Employee Contracts Third Party Pay Organization Views PTO Requests Process Hires Find...

### My Employees

add print help

Things I Can Do

FOR THIS PAGE

- [Add Employee \(Hire/Rehire\)](#)
- [Add Canadian Employee \(Hire/Rehire/Multi-Company Hire\)](#)
- [Add Global Employee](#)

Quick Tours and Tips

- [Human Resources – Resources for Employee Administrators](#)
- [UltiPro Navigation Overview](#)
- [Search with Filters Tour](#)
- [Modify Search Results Tour](#)
- [Hire/Rehire an Employee in the U.S. Tour](#)
- [Hire a Global Employee Tour](#)
- [Updating Global Employee Information Tour](#)

Find by: Last name | starts with | Search

Filtered by: Last name - starts with J [Clear Filters] Displaying all records

Actions: OK

Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
Jackson, Mark M.	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
Jackson, Mark M.	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
Jackson, Richard R.	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
Jackson, Charles D.	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

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- The selected employees will appear in the list
- Click on the desired employee to go to his/her record
- Click on the “Jobs” tab.

ABC Company(2)  
Richard R Jackson - 122331133

UltiPro by ULTIMATE SOFTWARE

Richard R Jackson

Personal Jobs Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Employee Summary | Name, Address, and Telephone | Status/Key Dates | Property | Contacts | Private Info | Identification Documents | Termination Info

### Richard R Jackson

Admin Assistant 2 (770) 123-8102 r\_jackson@ultimate.com

print help

Things I Can Do

FOR THIS PAGE

- [Change National ID \(SSN/SIN\)](#)
- [Manage Employee Photo](#)

FOR THIS TAB SET

- [Change Name, Address, or Telephone](#)
- [Add Alternate Phone Number](#)
- [View Status History](#)
- [Change Status](#)
- [Add Company Property](#)
- [Add Contact](#)
- [Change Private Information](#)
- [Change I-9](#)
- [Add Identification Document](#)
- [Terminate Employee](#)
- [Transfer Employee](#)

#### Personal Information

Name	Richard R Jackson	Primary e-mail	r_jackson@ultimate.com
Preferred	Richard	Alternate e-mail	
Employee number	122331133	Mailstop	
Time clock		Primary Home Phone	(770) 123-8102
Address		Primary Work Phone	(770) 129-9012

- The Job Summary will appear.
- On the right side, under “Things I Can Do”, select “Change Salary”

ABC Company(2)  
Richard R Jackson - 122331133

UltiPro by ULTIMATE SOFTWARE

Richard R Jackson

Personal Jobs Time Management Career & Education Career Development Pay Benefits Taxes Documents Audit

Job Summary Compensation Compensation Plans Variable Pay Organization Work Location Job History Contracts Allocations Reviews

Job Summary

edit print help

Things I Can Do

FOR THIS PAGE  
Change Job  
Change Job and Salary  
Add Secondary Jobs

FOR THIS TAB SET  
Change Salary  
Request One-Time Payout  
Change Variable Pay  
Change Organization  
Add Work Location (USA)  
Add Employee Job History  
Add Employment Contracts  
Add Employee Labor Allocations  
Add Review History  
Change Workers' Compensation  
Change Other Company

Primary Job	
Job	ADMINA - Admin Assistant 2
Alternate title	
Date in job	06/15/2002
Time in job	15 years 2 months 2 days
Salary grade	101 - Admin Level II
Shift Group	Z - None
Shift	Z - None
Pay group	HOURLY - Hourly - Weekly
Pay frequency	Weekly
Hourly/Salaried	Hourly
Seasonal	<input checked="" type="checkbox"/>
Agricultural	<input type="checkbox"/>

- The Change Salary screen appears.
- Fill in the fields as necessary (**fields with a red dot are required fields**)

Change Salary  
Mr. Kewin M. Saulniers - 871150101 - ABC Company(2)

UltiPro by ULTIMATE SOFTWARE

Change Salary

Change Review  
Summary

Effective • 08/17/2017  
Reason • 200 - Merit Increase  
Job CSR - Customer Service Rep  
Pay group • CORPBI - Corporate - Biweekly  
Pay frequency B - Biweekly  
Scheduled hours • 80.0000  
Pay currency US Dollar (USD)

Salary Guide

Salary grade	100 - Admin Level I
Currency	US Dollar (USD)
Location	TAMPA - Tampa, FL
Minimum	\$15.3846
Midpoint	\$19.7116
Maximum	\$24.0385

Salary

back next save cancel print help

○ CHANGE SALARY SCREEN:

- **\*Effective:** Enter the effective date of the Merit Review.
- **\*Reason:** Select the reason from the drop-down list (select “200-Merit Increase”)
- **Job:** This field will autofill

- **\*Pay group:** This field will autofill (Biweekly, 28Day or Elections)
  - **Pay frequency:** This field will autofill
  - **\*Scheduled hours:** This field will autofill
  - **Pay currency:** This field will autofill (US Dollar)
  
  - **Salary Guide:** These fields will autofill with current job info and ranges
  
  - **\*Salary:** Enter the Percent Change (ex: enter **3** for a 3.00% change)  
**(OR)**  
Enter the New Rate (enter the hourly rate and select per “Hour” from drop-down list)
  
  - **Other rates:** Skip these fields
  - **Notes:** Enter any additional information about this Merit action
- Click the NEXT button  (on upper right) to go to next screen

• The Change Review screen appears.

Change Salary  
Mr. Kewin M. Saulniers - 871150101 - ABC Company(2)

**UltiPro** | by ULTIMATE SOFTWARE

Change Salary

**Change Review**

Summary

### Change Review

back next save cancel print help

	Previous review	Current review
Review	12/31/2009	MM/DD/YYYY 
Rating	EXCELL - Excellent	<input type="text"/>
Type	Salary	<input type="text"/>
Reviewer	James Bana	<input type="text"/>
Next review	12/31/2010	MM/DD/YYYY 
Notes		<div style="border: 1px solid #ccc; height: 80px;"></div>

---

	Previous review	Current review
Review	01/01/2007	MM/DD/YYYY 

○ CHANGE REVIEW:

- **Salary:**
  - **\*Current Review:** Enter or select the current review date
  - **\*Rating:** Select the appropriate rating from the drop-down list
  - **\*Type:** Select the review type from the drop-down list (MERIT – Merit Review)
  - **Reviewer:** Enter the name of the reviewer (Last name, First name)

- *Next Review:* Enter the date the next salary review will be due
- *Notes:* Enter any other information to be included with this action

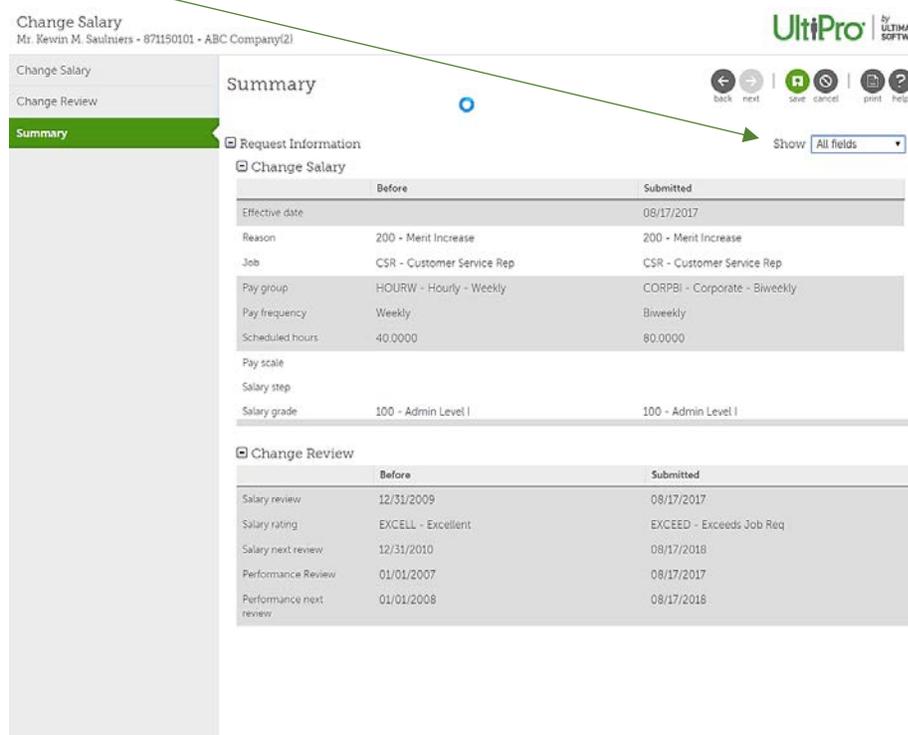
▪ Performance:

- *\*Current Review:* Enter or select the current review date
- *\*Rating:* Select the appropriate rating from the drop-down list
- *\*Type:* Select the review type from the drop-down list (ANN – Annual Review)
- *Reviewer:* Enter the name of the reviewer (Last name, First name)
- *Next Review:* Enter the date the next performance review is due
- *Notes:* Enter any additional information you'd like to include

- Click the NEXT button  (on upper right) to go to next screen

• SUMMARY SCREEN:

- Check all fields here for accuracy
- Click the “Back” button to return to previous screens for editing
- A warning will appear if the pay rate is outside the pay range for the assigned job.
- To view only the fields that were changed, go to the Show box and select “Changed Fields.”



Change Salary  
Mr. Kevin M. Saulniers - 671150101 - ABC Company(2)

Change Salary  
Change Review  
Summary

Summary

Request Information

Change Salary

	Before	Submitted
Effective date		08/17/2017
Reason	200 - Merit Increase	200 - Merit Increase
Job	CSR - Customer Service Rep	CSR - Customer Service Rep
Pay group	HOURW - Hourly - Weekly	CORPBI - Corporate - Biweekly
Pay frequency	Weekly	Biweekly
Scheduled hours	40.0000	80.0000
Pay scale		
Salary step		
Salary grade	100 - Admin Level I	100 - Admin Level I

Change Review

	Before	Submitted
Salary review	12/31/2009	08/17/2017
Salary rating	EXCELL - Excellent	EXCEED - Exceeds Job Req
Salary next review	12/31/2010	08/17/2018
Performance Review	01/01/2007	08/17/2017
Performance next review	01/01/2008	08/17/2018

Show: All fields

- When all information appears correct, click  save .
- A Workflow Approval message will appear.

Start

Details

Calculations

**Summary**

### Summary

back next **submit** reset cancel | print help

**!** You must select Submit to complete this request.

#### Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1

Approver Level 2

- Click the Submit button. (  submit )





## POSITION CHANGE

- This will include FLEX STAFF, PROMOTIONS, DEMOTIONS, TRANSFERS, RECLASSIFICATIONS, TEMP TO REG, AND REGULAR TO TEMP ACTIONS
  - For QUESTIONS about putting thru ICIMS, contact your Recruitment Specialist.
  - For OTHER QUESTIONS, contact your Generalist.
- Click MENU~ My Team~ My Employees
- If you have a Role box in the upper left, select Payroll Rep
- The My Employees screen appears.
  - In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click “Search”
- The selected employees will appear in the list.

Administration Employee Admin

UltiPro by ULTIMATE SOFTWARE

Paula Joyas | To Do | Help | Logout

Administrator Guide | My Employees | Employee Contracts | Third Party Pay | Organization Views | PTO Requests | Process Hires | Find...

### My Employees

add print help

Find by Last name starts with | Search

Filtered by Last name - starts with j [Clear Filters] Displaying all records

Actions OK

Name ^	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
<a href="#">Jackson, Mark M.</a>	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
<a href="#">Jackson, Mark M.</a>	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
<a href="#">Jackson, Richard R.</a>	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
<a href="#">Jackson, Susan D.</a>	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

FOR THIS PAGE

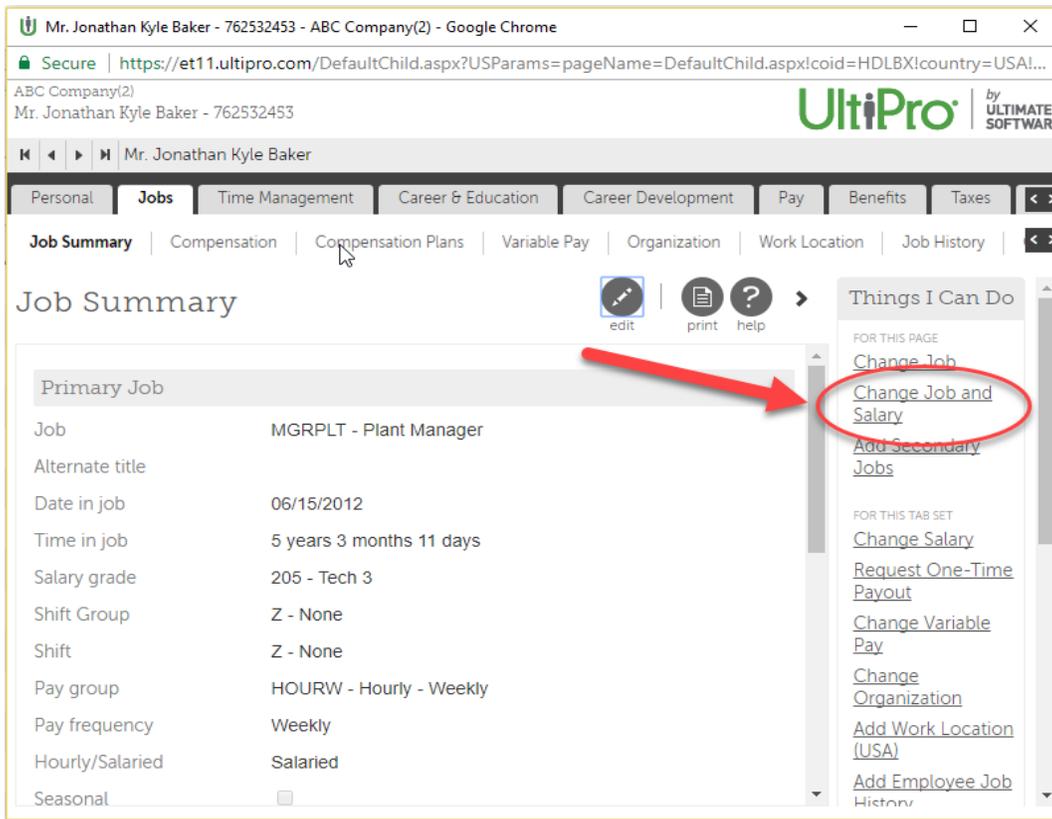
- [Add Employee \(Hire/Rehire\)](#)
- [Add Canadian Employee \(Hire/Rehire/Multi-Company Hire\)](#)
- [Add Global Employee](#)

Quick Tours and Tips

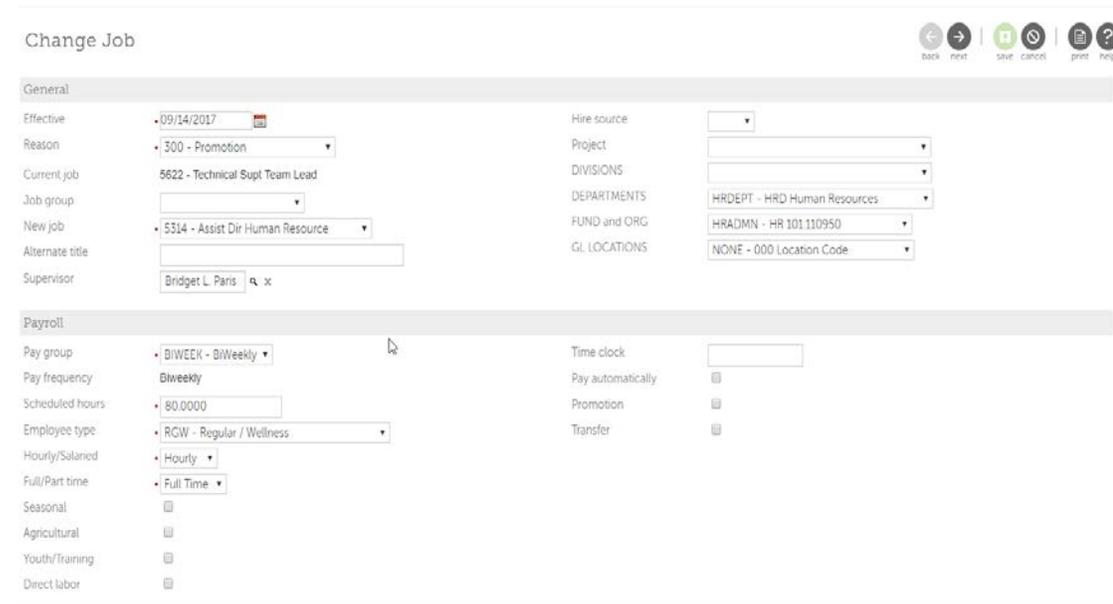
- [Human Resources – Resources for Employee Administrators](#)
- [UltiPro Navigation Overview](#)
- [Search with Filters Tour](#)
- [Modify Search Results Tour](#)
- [Hire/Rehire an Employee in the U.S. Tour](#)
- [Hire a Global Employee Tour](#)
- [Updating Global Employee Information Tour](#)

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- Click on the desired employee to go to his/her record.
- Click on the Jobs tab.
- Under Things I Can Do, click on “Change Job and Salary.”



- The Change Job screen appears.



- Complete the necessary fields (if staying the same leave as is):
  - *Effective Date*: Enter the effective date.
  - *Reason*: Select the reason from the drop-down list (ex: 300-Promotion)
  - *New Job*: Select the new job from the drop-down list
  - *Supervisor*: Click the Finder icon and select the new Supervisor
  - *Project*: Select the appropriate project code

- *DIVISIONS*: Select the Division code
  - *DEPARTMENTS*: Select the Department
  - *FUND and ORG*: Select the Fund/Org code
  - *GL LOCATIONS*: Select the Location Code
  - *Pay Group*: Select the Pay Group
  - *Scheduled Hours*: This is for the full pay period so 80 is most common
  - *Employee Type*: Select Employee Type
  - *Hourly/Salaried*: **ALWAYS CHOOSE HOURLY (even for Exempt employees)**
  - *Full/Part Time*: Select Full Time or Part Time
- Click Next
  - The Change Salary screen appears

Change Job and Salary  
Mr. Jonathan Kyle Baker - 762532453 - ABC Company(2)

Change Job  
**Change Salary**  
Change Review  
Summary

Change Salary

back next save cancel draft print help

**Salary Guide**

Salary grade	204 - Tech 2
Currency	US Dollar (USD)
Location	CHARLO - Charlotte, NC
Minimum	\$45,000.00
Midpoint	\$60,000.00
Maximum	\$75,000.00

**Salary**

Percent change \*  %

New rate  USD per

- Change the salary by entering a Percent change OR by typing in the New rate (per HOUR)
- Click Next.
- The Change Review screen appears.

The screenshot shows a web form titled "Change Review" with navigation buttons (back, next, save, cancel, print) in the top right. The form is divided into two main sections: "Salary" and "Performance".

**Salary Section:**

	Previous review	Current review
Review		09/14/2017
Rating		NOTAPP - Not Applicable
Type		SNTAPP - Not Applicable
Reviewer		
Next review	06/24/2018	09/14/2018
Notes		

**Performance Section:**

	Previous review	Current review
Review		09/14/2017
Rating		NOTAPP - Not Applicable
Type		NOTAPP - Not Applicable
Reviewer		
Next review	06/24/2018	03/14/2018
Notes		

- Complete the necessary fields:
  - Salary:
    - *Current Review:* Enter the effective date of action.
    - *Rating:* Select Rating from list (or select Not Applicable if review was not done)
    - *Type:* Select Type from list (or select Not Applicable if review was not done)
    - *Reviewer:* Type name of reviewer (Last name, first name)
    - *Next Review:* Enter appropriate date for next Salary Review
  - Performance:
    - *Current Review:* Enter the effective date of action.
    - *Rating:* Select Rating from list (or select Not Applicable if review was not done)
    - *Type:* Select Type from list (or select Not Applicable if review was not done)
    - *Reviewer:* Type name of reviewer (Last name, first name)
    - *Next Review:* Enter appropriate date for next Performance Review
- Click Next.
- The Summary screen appears.

Summary

back next save cancel print help

Show Changed fields

Request Information

Change Job

	Before	Submitted
Effective		09/14/2017
Reason	100 - New hire	300 - Promotion
Job	5622 - Technical Supt Team Lead	5314 - Assist Dir Human Resource
Supervisor	Mark Lane Olson	Bridget L. Paris
Project	IT0105 - User	
DIVISIONS	ITDIV - IT Information Technology Div	
DEPARTMENTS	ITCLNT - IT End User Computing	HRDEPT - HRD Human Resources
FUND and ORG	ITENDU - IT 608 460470	HRADMN - HR 101110950

Change Salary

	Before	Submitted
Salary grade	704 - 704	809 - 809
Salary grade minimum	\$28,4226	\$37,4832
Salary grade midpoint	\$34,1072	\$44,9798
Salary grade maximum	\$39,7917	\$52,4764
Hourly pay rate	\$39,7917	\$47,7500
Weekly pay rate	\$1,591.67	\$1,910.00
Period pay rate	\$3,183.34	\$3,820.00
Annual salary	\$82,766.74	\$99,320.08
Percent change	0.00 %	20.00 %

Change Review

	Before	Submitted
Salary review		09/14/2017
Salary rating		NOTAPP - Not Applicable
Salary type		SNTAPP - Not Applicable
Salary next review	06/24/2018	09/14/2018
Performance Review		09/14/2017
Performance rating		NOTAPP - Not Applicable
Performance type		NOTAPP - Not Applicable
Performance next review	06/24/2018	03/14/2018

- In the Show box, click *Changed Fields* to see only those fields that have changed.
- Review all fields; click the Back button if necessary to edit previous screens.



- When finished, click the Save button. (  )
- A Workflow Approval message will appear.

Start

Details

Calculations

Summary

Summary

back next submit reset cancel print help

! You must select Submit to complete this request.

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1 Benefits Admin Only

Approver Level 2 Payroll Admin and Processing Only



- Click the Submit button. (  )





## REHIRES

- Click MENU~ My Team~ My Employees
- If you have a Role box on the upper left, select Payroll Rep
- The My Employees screen appears.
- On the right side of the screen, under “Things I Can Do”, select “Add Employee (Hire/Rehire)” (OR) Click the green “Add” button.

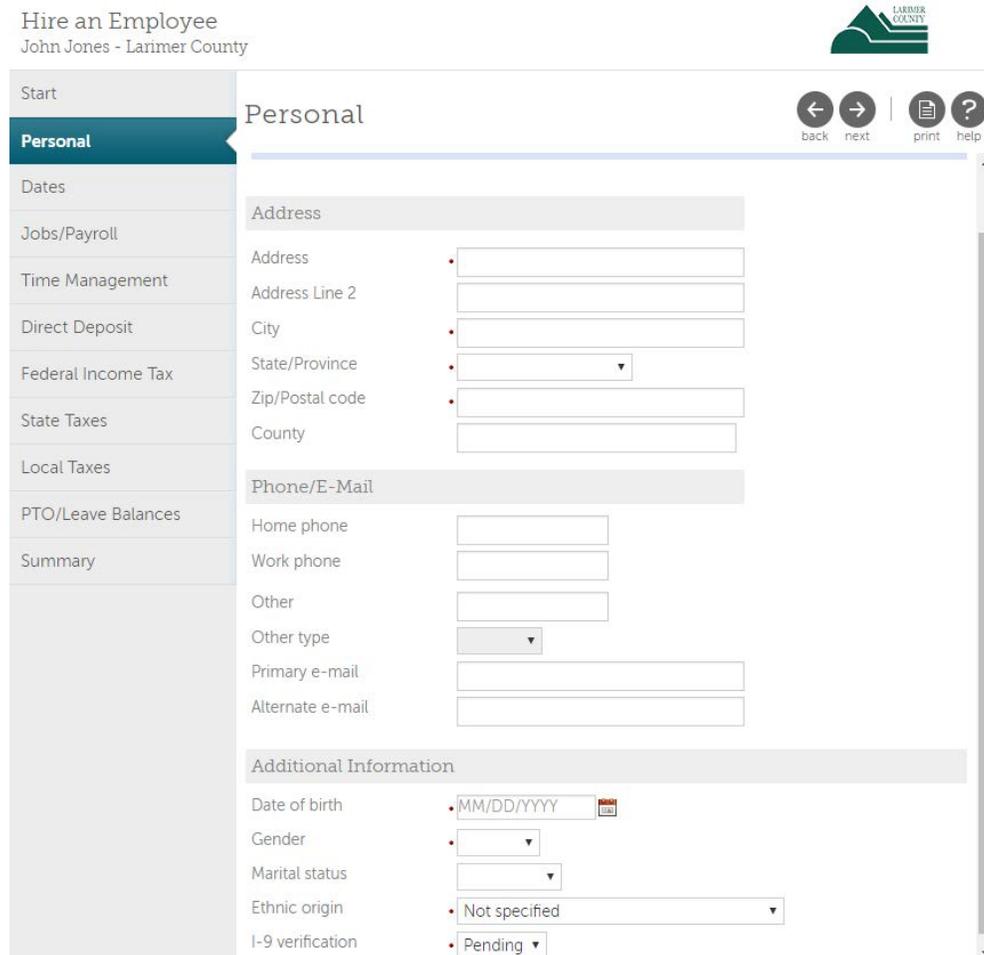
The screenshot shows the UltiPro interface for the 'My Employees' section. At the top, there is a navigation bar with 'My Employees' selected. Below this, there is a search area with a dropdown for 'Last name' and a 'Search' button. To the right of the search area, there are icons for 'add', 'print', and 'help'. The 'add' icon is circled in red. On the right side of the screen, there is a 'Things I Can Do' sidebar. Under this sidebar, the option 'Add Employee (Hire/Rehire)' is circled in red. Below this, there are several other options: 'Add Canadian Employee (Hire/Rehire/Multi-Company Hire)', 'Add Global Employee', and a 'Quick Tours and Tips' section with various links.

- The Hire an Employee screen appears (this is for rehires too).
- Ultipro will lead you through the series of screens listed on the left side.
- Fill in the fields on each screen as necessary (**fields with a red dot are required fields**).
- Click Next to get to the next screen.



- **START:**
  - **Company:** Click the drop-down list to select the appropriate company.  
NOTE: HR Only is for people who will be given system access but are not employees and will not be paid by us (ex: contingent workers, Sheriff's Posse, etc.)
  - **SSN:** Type in the employee's social security number – no dashes. Enter carefully and check to the employee's SS card!
  - **Confirm SSN:** Retype SS number
  
- A Warning Message appears to let you know that the SSN is already assigned to a terminated employee.

- Click the *Ignore Warnings* box
  - The Start screen will reset and autofill the fields with the employee's previous employment information
  - Check all fields and correct as necessary
  - Click the Next button (  ) to go to the next screen
- The Personal screen appears.



Hire an Employee  
John Jones - Larimer County

Personal

Address

Address

Address Line 2

City

State/Province

Zip/Postal code

County

Phone/E-Mail

Home phone

Work phone

Other

Other type

Primary e-mail

Alternate e-mail

Additional Information

Date of birth

Gender

Marital status

Ethnic origin

I-9 verification

- PERSONAL:  
(Many of the fields will be auto-filled from the employee's previous employment; **check and edit all fields as necessary.**)
  - **Address:** Enter address, city, state and zip code in appropriate fields
  - **Phone/Email:** Enter phone numbers and email addresses in fields

**NOTE: The Primary e-mail will become the employee's User ID for signing in to UltiPro and the address to which work-flowed information will go. Use a county email address whenever possible. If the employee doesn't have a county email, use his/her personal email. If the Primary e-mail address changes, notify Human Resources so they can change the User ID also.**

- **Additional Information:**
  - *I-9 verification:* Select “Yes” from drop-down list
- Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - Larimer County



Start	Dates		
Personal			
<b>Dates</b>		Employment Dates	
Jobs/Payroll		Hire date	<input type="text" value="MM/DD/YYYY"/>
Time Management		Seniority	<input type="text" value="MM/DD/YYYY"/>
Direct Deposit		Benefit seniority	<input type="text" value="MM/DD/YYYY"/>
Federal Income Tax		Next Review Dates	
State Taxes		Salary	<input type="text" value="MM/DD/YYYY"/>
Local Taxes		Performance	<input type="text" value="MM/DD/YYYY"/>
PTO/Leave Balances			
Summary			

Navigation: back, next, print, help

- DATES:
  - Employment Dates:
    - *\*Hire date:* Enter the new hire effective date
    - *\*Seniority:* Date will autofill from new hire date; leave as is
    - *\*Benefit Seniority Date:* Date will autofill from new hire date; leave as is
  - Next Review Dates:
    - *Salary:* Date autofills one year from hire date; adjust as necessary
    - *Performance:* Date autofills 180 days from hire date; adjust as necessary
    - **NOTE:** For temporary employees, remove the review dates and leave these fields blank
- Click the Next button (  ) to go to the next screen



Start	Jobs/Payroll		back	next	save	reset	cancel	print	help
Personal	Supervisor	<input type="text"/>	DIVISIONS		<input type="text"/>				
Dates	Job group	<input type="text"/>	DEPARTMENTS		<input type="text"/>				
<b>Jobs/Payroll</b>	Alpha Job Lookup List	<input type="text"/>	FUND and ORG		<input type="text"/>				
Time Management	Job	<input type="text"/>	GL LOCATIONS		<input type="text"/>				
Direct Deposit	Elected, Appointed, or Neither (N/A)	<input type="text"/>	Health Care Measurement Group		<input type="text"/>				
Federal Income Tax	Location	<input type="text"/>	Appointing Authority		<input type="text"/>				
State Taxes	State of employment	<input type="text"/>	HR Generalist		<input type="text"/>				
Local Taxes	Hire source	<input type="text"/>							
PTO/Leave Balances	Project	<input type="text"/>							
Summary	Payroll Information								
	Pay rate	<input type="text"/>	per	<input type="text"/>	Employee type	<input type="text"/>			
	Other rate 1	<input type="text"/>			Regular Position or Limited Term	<input type="text"/>			
	Other rate 2	<input type="text"/>			Hourly/Salaried	<input type="text"/>			
	Other rate 3	<input type="text"/>			Full/Part time	<input type="text"/>			
	Other rate 4	<input type="text"/>			Pay automatically	<input type="checkbox"/>			
	Pay group	<input type="text"/>							
	Pay frequency	<input type="text"/>							
	Distribution center	<input type="text"/>							
	Scheduled hours	<input type="text"/>							
	Earnings group	<input type="text"/>							
	Deduction/Benefit group	<input type="text"/>							
	1095-C Deduction Group Assignment Date	<input type="text"/>							

○ JOBS/PAYROLL:

- These fields will autofill from employee's previous job; **check and edit all fields as necessary with correct information for the employee's new job**
- Job Information:
  - **Supervisor:** Click the Finder icon and a pop-up box appears. Enter the supervisor's last name in the Find by box, click Search. Double click the name in the list and it will fill the field.
  - **Job Group:** Skip this field
  - **Alpha Job Lookup List:** Type the first few letters of the Job title and all jobs that contain those letters will appear. Make note of the desired job number to enter in the Job field below.
  - **\*Job:** Click the drop-down arrow and select the job number/name from the list (jobs are in numerical order so use the job number you found in the field above to help locate the job).
  - **Elected, Appointed, or Neither:** Select the appropriate status
  - If a Sheriff's Department sworn job was selected, the following fields will appear:
    - **Pay scale:** Select from the drop-down list
    - **Salary Step:** Select from the drop-down list
  - **\*Location:** Select location from drop-down list
  - **State of Employment:** Will auto-fill once a location is chosen.

- *Hire Source*: Skip this field
  - *Project*: Select the Project from the drop-down list
  - *DIVISIONS*: Select the Division code from the drop-down list
  - *DEPARTMENTS*: Select from the drop-down list
  - *FUND and ORG*: Select from the drop-down list
  - *GL LOCATIONS*: Select from the drop-down list
  - *Health Care Measurement Group*: Leave blank
  - *Appointing Authority*: Select from the drop-down list
  - *HR Generalist*: Select from the drop-down list
- Payroll Information:
- **Salary Guide** shows salary grade and range for this job
  - **NOTE**: For Sheriff's Dept. sworn jobs, the Salary Guide will not appear.
  - **\*Pay rate**: Enter pay rate PER HOUR (for **all** employees, *including Exempt*)
  - *Other rates*: Leave blank
  - **\*Pay group**: Select from drop-down list
  - *Distribution center*: Select "LARCO – Larimer County"
  - **\*Scheduled hours**: Enter the scheduled hours for the two-week pay period (ex: for full time, enter 80 hours)
  - **\*Earnings group**: Select from drop-down list
  - **\*Deduction/Benefit group**: Select from drop-down list (**FOR TEMPORARY EMPLOYEES CHOOSE NO BENEFITS/TEMPORARY**)
  - *1095-C Deduction Group Assnt Date*: Leave blank
  - **\*Employee type**: Select from drop-down list (For temps, select "TMP-Temporary Employee")
  - *Regular Position or Limited Term*: Select from drop-down list
  - **\*Hourly/Salaried**: **Select Hourly for ALL employees, including Exempts. (Nonexempt & Exempt status is set up at the job level)**
  - **\*Full/Part time**: Select from drop-down list
  - *Pay automatically*: Leave box unchecked
- Click the Next button (  ) to go to the next screen

- TIME MANAGEMENT:
  - This section is not yet set up. Skip this screen during Dual Entry.

Hire an Employee  
John Jones - ABC Company(2)

Time Management

Choose the Time Management security access and time entry rules that are relevant to this employee.

Additional Security Access

- Supervisor
- Administrator
- Both Supervisor and Administrator
- None

Employee Time Entry Rules

Shift number: DEFAULT SHIFT

Pay policy: DEFAULT PAY POLICY

Holiday rule: STANDARD

Pay type: Non-Exempt

Pay category: Full Time

Employee access group: Employee Access

Schedule request approver

Supervisor and Administrator

Supervisor access group: Supervisor Access

Administrator access group: Administrator Access

- Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - ABC Company(2)

Direct Deposit

Account Number	Bank	Account Type	Amount	Status	
xxxxxxxxxxxxxxxxxxxxxxxx2220	First National	Checking	Available balance	Active	

- DIRECT DEPOSIT:
  - The rehired employee's previous bank information will autofill.
  - Check all bank account information carefully
  - To add another account, click the Add button and complete the Direct Deposit Detail screen for the additional account
  - Then click "Next" to return to this screen and view both accounts in the list
  - Add or delete accounts as necessary

- Click the Next button (  ) to go to the next screen

Start	Federal Income Tax	          
Personal	Federal Taxes (Form W-4)	
Dates	Filing status	<input type="text" value="SINGLE"/>
Jobs/Payroll	Total allowances claimed	<input type="text" value="0"/>
Time Management	Additional amount withheld each paycheck	<input type="text" value="\$0.00"/>
Direct Deposit	<input type="checkbox"/> Employee claims exemption from withholding (blocked) <input type="checkbox"/> Employee has a Federal lock-in letter	
<b>Federal Income Tax</b>	Backup Withholding (Form W-9)	<input type="checkbox"/> Payee is subject to backup withholding
State Taxes	W-2 Reporting	<input type="checkbox"/> Pension
Local Taxes		
PTO/Leave Balances		
Summary		

○ FEDERAL INCOME TAX

- These fields will autofill with the employee's previous information
- Enter the following information from the employee's new W-4 form in the appropriate fields:
  - Filing status
  - Total allowances claimed
  - Additional amount to be withheld (if any)
- Do not check any of the boxes *unless...*
  - If the employee is claiming exemption from withholding, check the *Employee claims exemption* box. If claiming exemption, do not enter any allowances
- Click the Next button (  ) to go to the next screen

The screenshot shows a web browser window titled "Hire an Employee - Google Chrome" with the URL "https://et11.ultipro.com/pages/EDIT/EEAdminTaxState.aspx?USParams=PK=EEADM!MenuID=424!ParentRerId=425!SubDivRerId=674!mode=addoriginati...". The page header includes "Hire an Employee" and "John Jones - ABC Company(2)" on the left, and the "UltiPro by ULTIMATE SOFTWARE" logo on the right. A navigation menu on the left lists: Start, Personal, Dates, Jobs/Payroll, Time Management, Direct Deposit, Federal Income Tax, **State Taxes** (highlighted in green), Local Taxes, PTO/Leave Balances, and Summary. The main content area is titled "State Taxes" and contains the following fields: State (Colorado), Filing status (SINGLE), Total allowances claimed (1), and Additional amount withheld each paycheck (\$0.00). At the bottom of the form, there are two unchecked checkboxes: "Employee claims exemption from withholding (blocked)" and "Employee has a lock-in letter for this jurisdiction". On the right side of the form, there are six circular buttons: back, next, save, reset, cancel, and print/help.

○ STATE INCOME TAX

- These fields will autofill with the employee's previous information
- Enter the following information from the employee's new W-4 form in the appropriate fields:
  - Filing status
  - Total allowances claimed
  - Additional amount to be withheld (if any)
- Do not check any of the boxes *unless...*
  - If the employee is claiming exemption from withholding, check the *Employee claims exemption* box. If claiming exemption, do not enter any allowances
- Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - ABC Company(2)



Start

Personal

Dates

Jobs/Payroll

Time Management

Direct Deposit

Federal Income Tax

State Taxes

Local Taxes

**PTO/Leave Balances**

Summary

### PTO/Leave Balances

back next add save reset cancel print help

Plan	Available	Hours/Wages	Earned Through	Reset
No records found				

- PTO/LEAVE BALANCES:
  - LEAVE BALANCES WILL NOT BE MAINTAINED IN ULTIPTO UNTIL GO-LIVE
  - Some balances have been loaded to allow us to run sample payrolls and to learn the system, but these will be deleted prior to loading accurate balances in December
  - Click the Next button (  ) to go to the next screen

Hire an Employee  
John Jones - ABC Company(2)



Summary

Request Information

Show All fields

	Before	Submitted
Company	New	ABC Company(2)
Operating country	New	United States
Prefix	New	
First	New	John
Preferred name	New	John
Middle	New	James
Last	New	Jones
Former last	New	
Suffix	New	
Employee number	New	To be assigned
Time clock	New	

Personal

	Before	Submitted
Country	New	United States
Address	New	123 Elm St
Address Line 2	New	
City	New	Fort Collins
State/Province	New	Colorado
Zip/Postal code	New	80521

○ SUMMARY:

- A warning will appear if the pay rate is outside the pay range for the assigned job.
- Check all fields here for accuracy
- Click “back” to return to previous screens for editing



- When all information appears correct, click the green SAVE button (  )

- A Workflow Approval message will appear.

Summary

You must select Submit to complete this request.

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1 Benefits Admin Only

Approver Level 2 Payroll Admin and Processing Only

submit



- Click the Submit button. (  )

- **FINAL STEPS:**

- Once the rehire is saved, you will be returned to the “My Employees” screen.
- To find the employee you just rehired:
  - In the Find by box, select “Last name”
  - Select “is”
  - Type the rehired employee’s last name and click Search
  - The employee will appear in the list

My Employees

Find by Last name is jones Search

Filtered by Last name - is jones [Clear Filters] Displaying all records

Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
Jones, Andy M.	000000005	(954) 555-8600	1288	Active	Vice President - Sales	Ft. Lauderdale, FL	Software Division
Jones (Comer), Ann M.	321543232	(770) 724-4300		Active	Trainer	Atlanta, GA	Administration Division
Jones, Howard M.	000000111	(614) 555-2000	6544	Terminated	Technical Writer	Columbus, OH	Software Division
<b>Jones, John J.</b>	123333332			Active	Admin Assistant 2	Denver, CO	

- Click on the employee’s name to go directly to his/her record

ABC Company(2)  
John James Jones - 123333332

John James Jones

Personal | Jobs | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes | Documents | Audit

Employee Summary | Name, Address, and Telephone | Status/Key Dates | Property | Contacts | Private Info | Identification Documents | Termination Info | Other Personal Info

**John J Jones**  
Admin Assistant 2 (970) 232-2233 johnjones@gmail.com

Personal Information

Name	John James Jones	Primary e-mail	johnjones@gmail.com
Preferred	John	Alternate e-mail	
Employee number	123333332	Mailstop	
Time clock		Primary Home Phone	(970) 232-2233
Address	123 Elm St Fort Collins, CO 80521 United States	Primary Work Phone	
Company		Work extension	

Things I Can Do

FOR THIS PAGE

- [Change National ID \(SSN/SIN\)](#)
- [Manage Employee Photo](#)

FOR THIS TAB SET

- [Change Name, Address, or Telephone](#)
- [Add Alternate Phone Number](#)
- [View Status History](#)
- [Change Status](#)
- [Add Company Property](#)
- [Add Contact](#)
- [Change Private Information](#)
- [Change I-9](#)
- [Add Identification Document](#)
- [Terminate Employee](#)
- [Transfer Employee](#)
- [Change Other Personal Information](#)

Quick Tours and Tips

- [Human Resources - Resources for Employee Administrators](#)
- [Terminate an Employee Tour](#)
- [Transfer an Employee Tour](#)

- Finally, update the Driver’s License information for the rehired employee.

- Click on the Career & Education tab and the Licenses sub-tab

ABC Company(2)  
Mr. Andy M. Jones - 000000005

UltiPro by ULTIMATE SOFTWARE

Personal | Jobs | Time Management | **Career & Education** | Career Development | Pay | Benefits | Taxes | Documents | Audit

Goals | Competencies | Personal Development | Talent Profile | Talent Factors | **Licenses** | Skills | Tests | Previous Employment | Awards | Education

### Licenses and Certifications

Received	License / Certification	Number	Type	Provider	Renewal	Notes	Delete
No records found							

Things I Can Do

FOR THIS PAGE  
[Add Licenses/Certifications](#)

FOR THIS TAB SET  
[View Recommended Goals](#)  
[Add/Change Goal Weighting](#)  
[Add Skills](#)  
[Add Tests](#)  
[Add Previous Employment](#)  
[Add Awards](#)  
[Add Education](#)  
[Add Relocation Preferences](#)

Quick Tours and Tips

- If the license appears in the list, click on it.
- If there is nothing in the list, click the green Add button on the upper right (OR) under Things I Can Do, click on Add Licenses/Certifications

ABC Company(2)  
Mr. Andy M. Jones - 000000005

UltiPro by ULTIMATE SOFTWARE

Personal | Jobs | Time Management | **Career & Education** | Career Development | Pay | Benefits | Taxes | Documents | Audit

Goals | Competencies | Personal Development | Talent Profile | Talent Factors | **Licenses** | Skills | Tests | Previous Employment | Awards | Education | Relocation Preferences

### Add/Change License or Certification

License / Certification:

Number:

Received:

Renewal:

Provider:

Notes:

save reset cancel print help

Things I Can Do

FOR THIS TAB SET  
[View Recommended Goals](#)  
[Add/Change Goal Weighting](#)  
[Add Licenses/Certifications](#)  
[Add Skills](#)  
[Add Tests](#)  
[Add Previous Employment](#)  
[Add Awards](#)  
[Add Education](#)  
[Add Relocation Preferences](#)

Quick Tours and Tips

[Write SMART Goals Tour](#)  
[Add a Goal Tour](#)  
[Add and Change Goal Weighting Tour](#)

- Complete and/or edit all fields:
  - **License/Certification:** Select license type from drop-down list
  - **Number:** Enter the Driver's License number, including dashes
  - **Received:** Enter the Issued date
  - **Renewal:** Enter the Expiration date
  - **Provider:** Select the State that issued the license
  - **Notes:** Type additional information, if desired



- Click the green SAVE button ( **save** ) in the upper right corner
- A Workflow Approval message may appear.



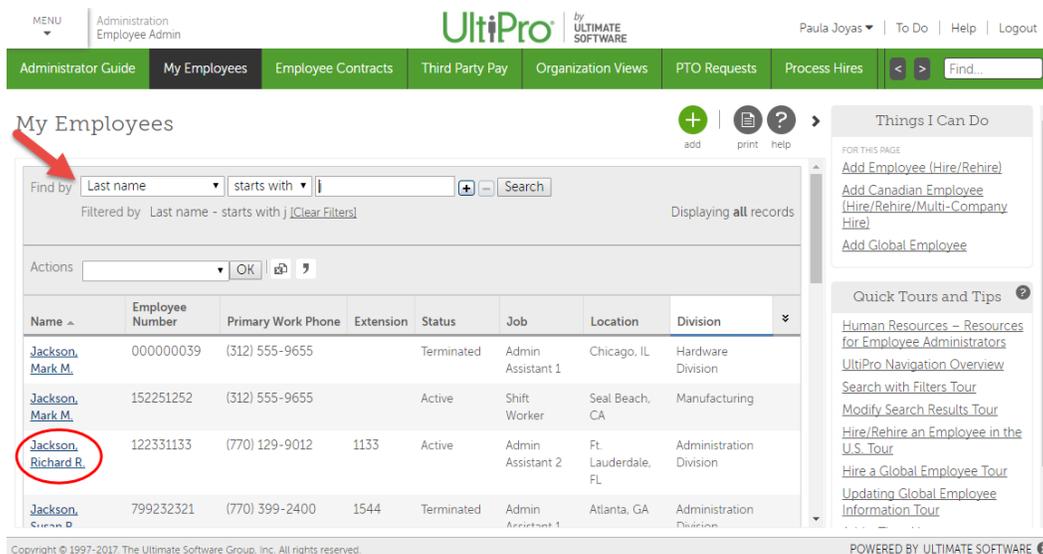
- Click the Submit button. ( **submit** )



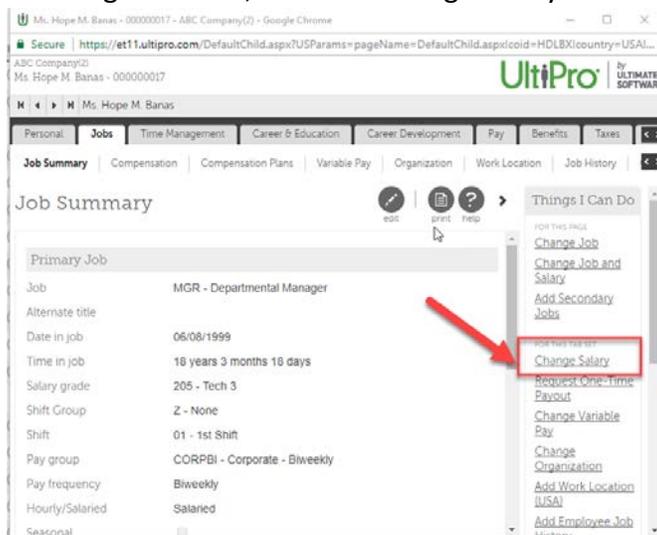


# SALARY ADJUSTMENT

- Click MENU~ My Team ~ My Employees
- If you have a Role box in the upper left, select Payroll Rep
- The My Employees screen appears.
  - In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click “Search”
- The selected employee will appear in the list.



- Click on the desired employee to go to his/her record.
- Click on the Jobs tab.
- Under Things I Can Do, click on “Change Salary.”



- The Change Salary screen appears.

	Current	New
Hourly	\$36.7789	\$40.4568
Weekly	\$1,471.15	\$1,618.27
Period	\$2,942.31	\$3,236.54
Annual	\$76,500.02	\$84,150.12
Percent change	0.00 %	10.00 %

- Complete the necessary fields:
  - *Effective Date*: Enter the effective date.
  - *Reason*: Select the reason from the drop-down list ( 201 – Salary Adjustment )
  - *Salary*: Enter Percent Change or New Rate (per Hour).
- Click Next.
- The Review Salary screen appears
  - Leave Review Date fields blank (most inequity or other salary adjustments do not affect the employee’s existing review date.)
- Click on Next.
- The Summary screen appears.

	Before	Submitted
Effective date		09/22/2017
Reason	200 - Merit Increase	201 - Salary Adjustment
Hourly pay rate	\$36.7789	\$40.4568
Weekly pay rate	\$1,471.15	\$1,618.27
Period pay rate	\$2,942.31	\$3,236.54
Annual salary	\$76,500.02	\$84,150.12
Percent change	0.00 %	10.00 %

- A warning will appear if the pay rate is outside the pay range for the assigned job.
- Check all fields here for accuracy
- Click “back” to return to previous screens for editing



- When all information appears correct, click the SAVE button (  )

- A Workflow Approval message will appear.

Start

Details

Calculations

**Summary**

Summary

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1

Approver Level 2

back next submit reset cancel print help

- Click the Submit button. (  )

- **FINAL STEPS:**

- Add backup documentation to the employee's record
  - Click on the DOCUMENTS TAB
  - Click on the Add button
  - Attach backup documentation.
  - See *Attaching Documents* guide for more detailed instructions





# SUPERVISOR CHANGE

- Click MENU~ My Team ~ My Employees
- If you have a Role box in the upper left, select Payroll Rep
- The My Employees screen appears.
  - In the “Find by” box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click “Search”
- The selected employees will appear in the list.

Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
Jackson, Mark M.	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
Jackson, Mark M.	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
Jackson, Richard R.	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
Jackson, Susan D.	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

- Click on the desired employee to go to his/her record.
- Click on the Jobs tab and the Organization sub-tab

Dee Marina Schmidt

Personal | **Jobs** | Time Management | Career & Education | Career Development | Pay | Benefits | Taxes

Job Summary | Compensation | Variable Pay | **Organization** | Work Location | Job History | Allocations | Reviews

Primary Job

Job	5134 - Department Spec II
Alternate title	
Date in job	02/07/2013
Time in job	4 years 7 months 19 days
Salary grade	402 - 402
Pay group	BIWEEK - BiWeekly
Pay frequency	Biweekly
Hourly/Salaried	Hourly
Seasonal	<input type="checkbox"/>
Agricultural	<input type="checkbox"/>
Youth/Training	<input type="checkbox"/>

Things I Can Do

- Change Job
- Change Job and Salary
- Add Secondary Jobs
- Change Salary
- Change Variable Pay
- Change Organization
- Add Work Location (USA)
- Add Employee Job History
- Add Employee Labor Allocations

- Click on the EDIT button (upper right)

Larimer County  
Dee Marina Schmidt - 061620

Organization

Effective date	02/07/2013
Reason	100 - New hire
Supervisor	Nicholas A Cole
Location	F2000 - FC 200 W Oak
Project	00000000 - None
Home company	Larimer County
Time clock	
DIVISIONS	ACMDIV - BCC Assit County Manager
DEPARTMENTS	HRDSRV - HRD Services
FUND and ORG	HRADMN - HR 101.110950
GL LOCATIONS	NONE - 000 Location Code

Things I Can Do

- FOR THIS PAGE: [Change Organization](#)
- FOR THIS TAB SET: [Change Job](#), [Change Job and Salary](#), [Add Secondary Jobs](#), [Change Salary](#), [Change Variable Pay](#), [Add Work Location \(USA\)](#), [Add Employee Job History](#), [Add Employee Labor Allocations](#), [Add Review History](#), [Change Workers' Compensation](#)

- The Change Organization screen appears.

Larimer County  
Dee Marina Schmidt - 061620

Change Organization

save reset cancel print help

Effective	MM/DD/YYYY
Reason	
Supervisor	Nicholas A Cole
Location	F2000 - FC 200 W Oak
Project	00000000 - None
Home company	Larimer County
Time clock	
DIVISIONS	ACMDIV - BCC Assit County Manager
DEPARTMENTS	HRDSRV - HRD Services
FUND and ORG	HRADMN - HR 101.110950
GL LOCATIONS	NONE - 000 Location Code

Things I Can Do

- FOR THIS TAB SET: [Change Job](#), [Change Job and Salary](#), [Add Secondary Jobs](#), [Change Salary](#), [Change Variable Pay](#), [Change Organization](#), [Add Work Location \(USA\)](#), [Add Employee Job History](#), [Add Employee Labor Allocations](#), [Add Review History](#), [Change Workers' Compensation](#), [Change Other Company Information](#)

- Complete the necessary fields:
  - *Effective Date*: Enter the effective date.
  - *Reason*: Select the reason from the drop-down list ( 503 - Supervisor Change)
  - *Supervisor*: Click the Finder icon to select new supervisor



- Click the green SAVE button in the upper right. ( save )

- To check your work, click on the Personal tab and the Employee Summary sub-tab. Scroll down to the Job section at the bottom of the screen to see the new supervisor name.





# TERMINATE EMPLOYEE

- Click MENU~ My Team~ My Employees
- If you have a Role box in the upper left, select Payroll Rep
- The My Employees screen appears.
  - In the "Find by" box, choose a search option (Last name, Employee number, etc.)
  - Choose/enter appropriate info in the next two fields and click "Search"
- The selected employees will appear in the list.

My Employees

Find by: Last name | starts with: | Search

Filtered by: Last name - starts with j [Clear Filters] | Displaying all records

Name	Employee Number	Primary Work Phone	Extension	Status	Job	Location	Division
Jackson, Mark M.	000000039	(312) 555-9655		Terminated	Admin Assistant 1	Chicago, IL	Hardware Division
Jackson, Mark M.	152251252	(312) 555-9655		Active	Shift Worker	Seal Beach, CA	Manufacturing
Jackson, Richard R.	122331133	(770) 129-9012	1133	Active	Admin Assistant 2	Ft. Lauderdale, FL	Administration Division
Jackson, Susan P.	799232321	(770) 399-2400	1544	Terminated	Admin Assistant 1	Atlanta, GA	Administration Division

- Click on the desired employee to go to his/her record
- Click on the Benefits tab and the PTO PLANS sub-tab

ABC Company(2)  
Richard R Jackson - 122331133

Richard R Jackson

Personal | Jobs | Time Management | Career & Education | Career Development | Pay | **Benefits** | Taxes | Documents | Audit

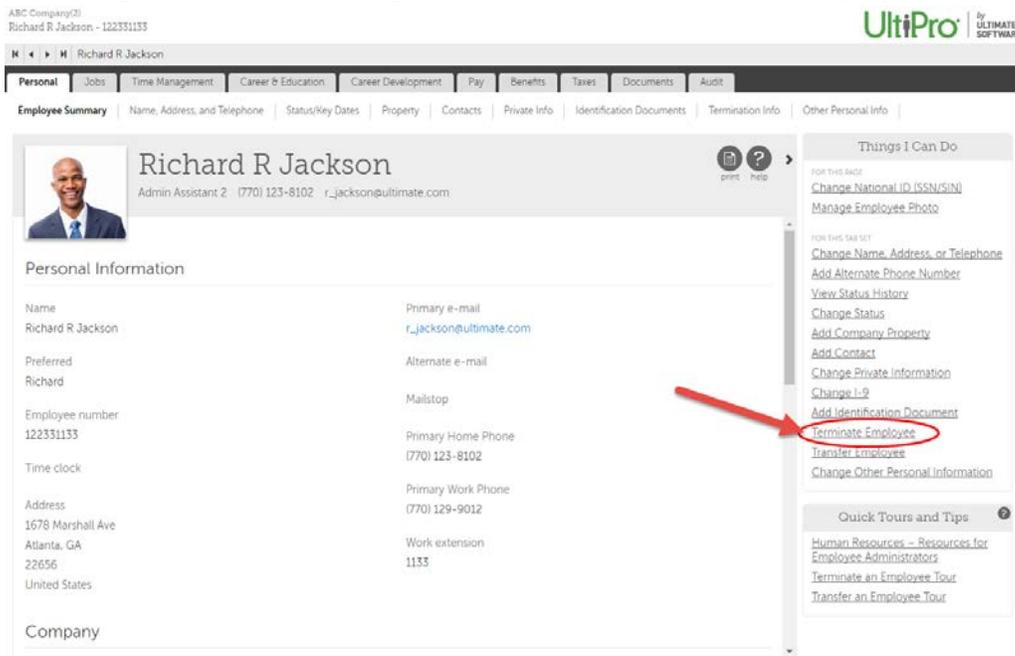
Current Benefits | Beneficiaries/Dependents | Investments | **PTO Plans** | PTO Requests | COBRA | Health Care Eligibility | 1095-C | Offer of Coverage | Links

PTO Plans

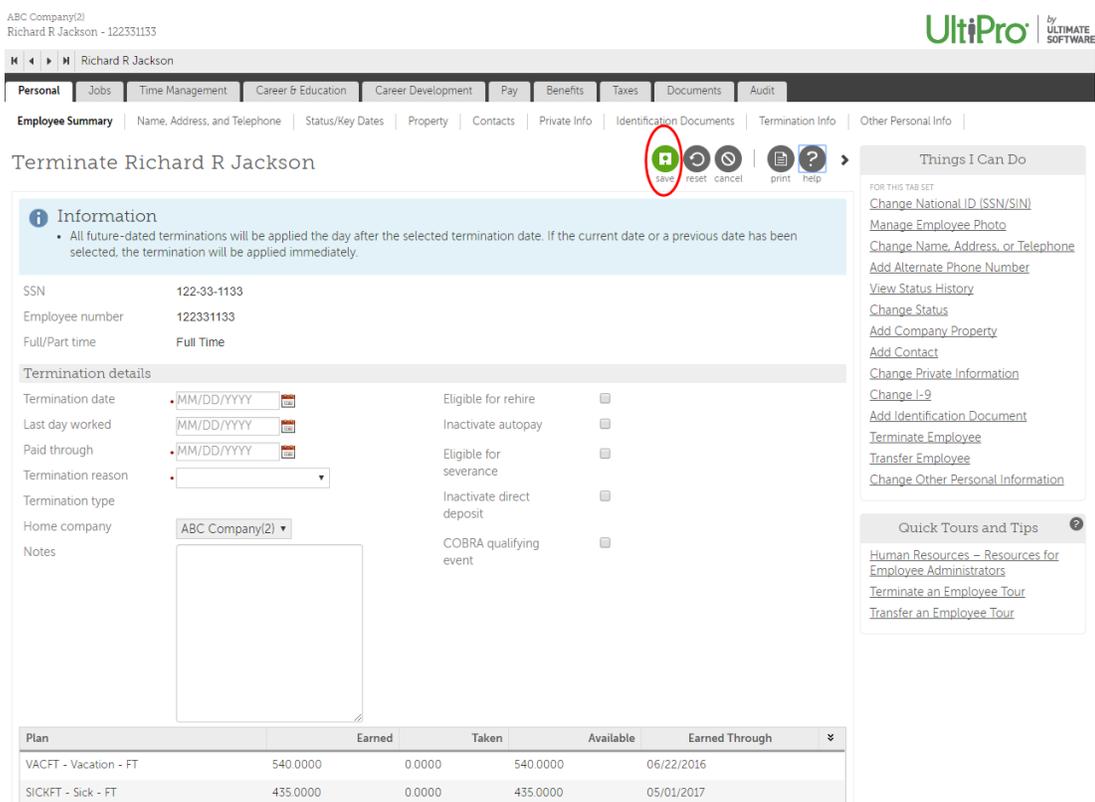
Length of service as of 05/21/2017  
14 Years 11 months 6 days

Plan	Earned	Processed	Available	Unprocessed Approved	Estimated Total Plan	Earned Through	Reset Date	Hours/Wages	Delete
Sick - FT	435.0000	0.0000	435.0000	0.0000	540.0000	05/01/2017	12/31/2016	Hours	<input type="checkbox"/>
Vacation - FT	540.0000	0.0000	540.0000	0.0000	540.0000	06/22/2016	06/15/2016	Hours	<input type="checkbox"/>

- Check the employee's PTO Balances.
  - As of right now accruals are NOT in Ultipro. These will be loaded when we do the first payroll for 2018.
- Go back to the Personal tab.
- On the right side, under "Things I Can Do", select "Terminate Employee"



- The Terminate Employee screen appears.



- Fill in the fields as necessary (**fields with a red dot are required fields**)
  - *Termination date*: Enter the effective date of the termination (this is the last day in paid status – NOT the day after like with ADP)
  - *Last day worked*: Enter the last day the employee was physically on the job
  - *Paid through*: Usually same as term date (last day in paid status)
  - *Termination reason*: Select reason from drop-down list
  - *Termination type*: This will autofill based on the termination reason chosen
  - *Home company*: This field will autofill
  - *Notes*: Enter any information related to this termination action
  - *Eligible for rehire*: Check this box if employee is eligible for rehire (if not, leave unchecked)
  - **Leave other boxes unchecked**



- When all information appears correct, click the green **SAVE** button (  )
- A Workflow Approval message will appear.

A screenshot of a web application interface. On the left is a navigation menu with 'Summary' selected. The main content area is titled 'Summary' and contains a red error message: 'You must select Submit to complete this request.' Below this is a 'Workflow Approvals' section with a blue instruction: 'This request requires one or more approvals. Select the reviewers who are appropriate for your situation.' There are two dropdown menus for 'Approver Level 1' (set to 'Benefits Admin Only') and 'Approver Level 2' (set to 'Payroll Admin and Processing Only'). At the top right of the main content area, there is a toolbar with buttons for 'back', 'next', 'submit', 'reset', 'cancel', 'print', and 'help'. The 'submit' button is circled in red, and a red arrow points to it from the error message.

- Click the Submit button. (  )
- **COMPLETE FINAL STEPS:**
  - If the employee is a Supervisor, reassign direct reports (see Supervisor Change instructions).
  - **ATTACH ALL DOCUMENTS:** Resignation Letter, Employee Separation Form, etc. (see *Attaching Documents* guide for detailed instructions)



## Payroll and the General Ledger

UltiPro has a General Ledger process so it can produce a file to send to our Finance Department and post Payroll to the General Ledger.

The basic structure for the Finance General Ledger is *Fund.Org.Project.Account.Location*. Because of this structure, all of the fields are required in UltiPro.

- Fund and Org – Enter your department fund and org
- Project – Enter your department appropriate project code or **00000000 – 00000000 – No Project**
- Account – Hard coded in UltiPro based on earnings codes and deductions codes. No entry required.
- GL Location – Enter your department appropriate GL Location code or **NONE – 000 Location Code**

The screenshot shows the 'Organization' form in UltiPro. A yellow callout box at the top states: 'For GL to work you must complete: FUND and ORG, Project, GL LOCATIONS. If you do not use Project or GL Locations you must select the zero codes as listed in this example.' Red arrows point from this box to the 'Project' and 'GL LOCATIONS' fields. The 'Project' field contains '00000000 - 00000000 - No Project' and is highlighted with a red box. The 'GL LOCATIONS' field contains 'NONE - 000 Location Code' and is also highlighted with a red box. Other fields include 'Effective date', 'Reason' (203 - Market Increase), 'Supervisor' (Linda Marie Illum), 'Location' (F2000 - FC 200 W Oak), and 'Home company' (Larimer County). The right side of the form shows 'DIVISIONS' (ACMDIV - BCC Assit County Manager), 'DEPARTMENTS' (HRDSRV - HRD Services), and 'FUND and ORG' (HRADMN - HR 101.110950), with the latter two highlighted in blue boxes. A 'Sheriff's Department Information' section is at the bottom.

**DO NOT USE the "Z" code in Core or UTM.**

The screenshot shows a dropdown menu for project codes. The 'Z - None' option is highlighted in yellow. The '00000000 - 00000000 - No Project' option is highlighted in blue. A blue arrow points from a text box to this option. The text box contains: 'When you are using the drop down box for Project... If you do not use a specific Project code then select the all zeros item - No Project. Do NOT use the Z - None. This is an UltiPro system code that is used when the system can not match GL codes. If used, this will cause your whole GL coding to drop from the GL File.'