



Capital HR User Guide

New Hire Process (example Transfer)



Overview

Due to the current system configuration, new hire actions cannot be processed in the workflow. For this reason, personnel action requests (PARs) for new hires must be created and processed in the HR offices. To ensure all necessary authorizations/ approvals are obtained and documented prior to the PAR being processed, the administrative/ management offices will use the Capital HR Recruit workflow functionality. Please note that this Step is separate from that of the PAR action which will be processed by HR. There is no link between the Recruit Request and the PAR. The Recruit Request should be closed out before the PAR is created. For all actions make sure you view the [GPPA](#) and [Vet Guide](#) (Guide to Processing Personnel Actions and/or the Veterans Guide!)

Note: This job aid describes the flow of the new hire process from the Administrative/Management Office, to HR Operations, and to the HR & Payroll Solutions Branch (HRPSB, also known as WRD).

Capital HR Transfer/New Hire (Completed in OHR/CSD)

Example of a transfer PAR Action:

For all actions make sure you view the [GPPA](#) and [Vet Guide](#) (Guide to Processing Personnel Actions and/or the Veterans Guide!)

- 1) Navigation
 - a. Menu > Workforce Administration > Job Information > Hire Employee (USF)
- 2) Click “**Add**” (do not change Empl Rcd Nbr. It must remain “0”.)
- 3) **Data Control Tab**

The screenshot shows the 'Data Control' form in the HR system. A red callout box at the top right says 'Fill out all tabs and all hyperlinks'. Red arrows point from this box to the 'Personal Data', 'Job', 'Position', 'Compensation', 'Employment 1', and 'Employment 2' tabs. The form fields include:

- Actual Effective Date: [calendar icon]
- Proposed Effective Date: 01/05/2016
- Transaction # / Sequence: [] []
- Not To Exceed Date: []
- *Action: HIR Hire
- Par Status: REQ Requested
- *Reason Code: []
- Contact Emplid: []
- NOA Code: []
- NOA Ext: []
- Authority (1): [] Descr (1): [] Descr (1) Part 2: []
- Authority (2): [] Descr (2): [] Descr (2) Part 2: []
- PAR Request#: []
- Buttons: Print SF-52, Process Monitor, PAR Remarks, Award Data, Tracking Data, Severance Pay

- 4) Actual Effective Date, enter or click on calendar and select
- 5) Reason Code = **XFR** (this is just an example, view the [GPPA](#) and [Vet Guide](#))
- 6) NOA Code - **130** (this is just an example, view the [GPPA](#) and [Vet Guide](#))
- 7) NOA Ext – **0** (this is just an example, view the [GPPA](#) and [Vet Guide](#))



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- 8) Not To Exceed Date: (if applicable) must be entered **after** NOA Code (**System Edit** – required if NOA code requires it)
- 9) Authority (1) = as applicable
- 10) Authority (2) = as applicable
- 11) PAR Status defaults to “REQ”
 - a. HR Assistant places PAR Status to INI (initiate), HR Specialist reviews the action and places the PAR Status to REV (review)
- 12) Click on PAR Remarks hyperlink
- 13) Remark CD = fill in code or select from Lookup (view the [GPPA](#) and [Vet Guide](#))
- 14) Tab out of the Remark code field to see the text of the Remark
- 15) If insertion is required checkbox is checked, enter required information
- 16) To add **additional Remark Codes** click on the **(+)** sign
- 17) For HHS specific Remarks code you must use ZZZ (put all such HHS Remarks under the one ZZZ code.)
- 18) After **all** Remarks have been entered, click “OK”

Personal Data Tab

EmplID: NEW Empl Rcd#: 0

Find | View All First 1 of 1 Last

Effective Date:	Transaction# /Seq	PAR Status: Requested
Action Type: Hire	NOA Code:	Empl Status: Active
Prefix: <input type="text"/>		
First: <input type="text"/>	Middle: <input type="text"/>	
Last Name: <input type="text"/>	Suffix: <input type="text"/>	
Name:		
Gender: <input type="radio"/> Male <input checked="" type="radio"/> Female	Citizenship Status *Country: <input type="text" value="USA"/> United States Citizenship: <input type="text" value="1"/> U.S. Citizen	
Draft Status: <input type="text"/>	Date of Death: <input type="text"/>	Ethnicity
*Date of Birth: <input type="text"/>	Date Entitled to Medicare: <input type="text"/>	
Disability Code: <input type="text" value="05"/> No Handicap		

[Additional Birth Info](#) [Address Information](#) [Personal Phone Numbers](#) [Veterans Info](#) [Marital Info](#) [Education Details](#)

Country: <input type="text" value="USA"/>	*Type/Description: <input type="text" value="PR"/>	National ID: <input type="text"/>
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Capital HR allows punctuations like apostrophes, example O’Brian

Use Roman Numerals rather than numbers when applicable

- 1) First Name = as stated
- 2) Middle Name = as stated
- 3) Last Name = as stated (do not enter suffix in the last name field)



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- 4) Suffix = if applicable Enter suffix using the “suffix box” do not enter suffix in the last name field. Any suffix other than those shown will have to be submitted on a ticket to the Department
- 5) Gender = defaults ‘Female’, select radio button for ‘Male’ if applicable
- 6) Citizenship Status = defaults to “1”, use the “Lookup” for other. Non-citizens should be “8”

Ethnicity Hyperlink

Note: You will see both the Race and National Origin (RNO) Ethnic Group field and the Ethnicity and Race Identification (ERI) field. Edits have been added to this page so that if the ERI field is updated by selecting one or multiple checkboxes, the RNO Ethnic Group field is updated. You cannot enter an ERI code and then change the Ethnic Group.

- 1) Choose valid ERI combo (as many apply)

Ethnicity and Race Identification - Choose a valid Combo

Hispanic or Latino? Ethnicity and Race Ident: 100001

American Indian or Alaska Native?

Asian?

Black or African American?

Native Hawaiian or Other Pacific Islander?

White?

- a.
- b. In the above scenario if the employee chose “Hispanic or Latino” and “White”. Their ERI 6-digit code is represented as: 100001. The order from the top-down maps to the 6-digit code from left to right. In the scenario where the person would have chosen “Asian” and “Black or African American” the code would be represented as 001100.

- 2) RNO Ethnic Group is generated

Race and National Origin

*Ethnic Group: Black, not of Hispanic origin

- a.
- 3) Click OK icon
- 4) Draft Status = select from drop-down menu
- 5) Date of Birth = as stated
- 6) Disability Code = default (05) otherwise select from Lookup

Additional Birth Information Link Page

- 1) Birth Location = enter city
- 2) Birth State = enter state (if born in USA) or select from drop-down menu
- 3) Birth Country = enter country (defaults to USA) or use Lookup
- 4) OK, returns to Personal Data tab



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Address Information Link Page (*limited to 25 characters*)

Note: WRD FAU (Final Authorizers Unit) will submit tickets for foreign addresses. Foreign address should NOT be keyed into Capital HR without prior discussion with WRD FAU. Foreign addresses must be an APO address. Reference the OPM Duty Station Locator for the foreign address geographic location code. Country should NEVER change from USA even if in a foreign location.

- 1) See Contact Address
- 2) Confirm the default country of USA or enter another country by using Lookup
- 3) Click Edit Address
- 4) In Address 1, fill in Street Address
- 5) City
- 6) County (in known)
- 7) State
- 8) Postal
- 9) Res Location Code - fill in the residential geographic location code or use Lookup. Unless using an overseas code, all codes should contain state, city, and county.
- 10) "OK" Address information is displayed from Edit Address page Note: The first "Address" box is used for Payroll purposes. The second box, 'Mailing Address,' is not used for payroll purposes. This additional 'Mailing Address' may be stored but will not be sent to Payroll.
- 11) "OK" returns you to Personal Data tab

Veterans Info Hyperlink – (If there is no Veterans Information, you may skip this step, Veterans Info defaults to none). For all actions make sure you view the [GPPA](#) and [Vet Guide](#) (Guide to Processing Personnel Actions and/or the Veterans Guide!)

- 1) Veterans Preference – 'None' defaults, change by using drop-down menu
- 2) Veterans Status – 'Not a Veteran' defaults, change by using drop-down menu
- 3) Uniformed Service - fill in or use drop down menu as appropriate
- 4) Military Separation Status - fill in or use drop down menu as appropriate
- 5) Military Grade - fill in or use drop down menu as appropriate
- 6) Military Service Start Date – fill in as appropriate
- 7) End Date – fill in as appropriate
- 8) Reserve Category - fill in or use drop down menu as appropriate
- 9) Creditable Military Service - fill in as appropriate (months/years)
- 10) Veterans Preference RIF – check box, if applicable
- 11) Disabled Veteran – check box, if applicable
- 12) "OK" returns to Personal Data tab

Education Details Hyperlink –

- 1) Degree (Education level) - fill in or use Lookup as appropriate (**System edit** – for 06, 10 and 13 or greater, requires a year of degree and a degree code)
- 2) Year Earned/Expected – fill in year Earned ONLY – do not use future date (**System edit** – must be greater than year of birth plus seventeen years)



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- 3) Major Code – fill in or use “Lookup” as appropriate. Only the first 300 will appear, so use Description Lookup if necessary to see appropriate OPM value.
- 4) “OK”, returns to Personal Data tab
- 5) National ID (**SSN**) = fill in

Job Tab

EmpID: NEW Empl Rcd#: 0

Data Control	Personal Data	Job	Position	Compensation	Employment 1	Employment 2	CI Exceptions
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Job Data Find | View All First 1 of 1 Last

Effective Date:	Transaction# /Seq	PAR Status: Requested
Action Type: Hire	NOA Code:	Empl Status: Active
Position: <input type="text"/>	- -	<input type="checkbox"/> Position Management Record
*Job Code: <input type="text"/>	- -	<input type="checkbox"/> Position Override
Reports To: <input type="text"/>		<input checked="" type="checkbox"/> Eligibility to Telework
*Agency: <input type="text"/>		Transferred From Agency: <input type="text"/>
Sub-Agency: <input type="text"/>		Transferred To Agency: <input type="text"/>
*Business Unit: NIH00	National Institutes of Health	Benefits/FEHB Data
*Department: <input type="text"/>		FEGLI/Retirement/FICA
*Location: <input type="text"/>		Departmental Hierarchy
Tax Location: NA	Not Applicable	Detail

[Data Control](#) | [Personal Data](#) | [Job](#) | [Position](#) | [Compensation](#) | [Employment 1](#) | [Employment 2](#) | [CI Exceptions](#)

- 1) Position Number – enter position number assigned (fields will populate based on the Position build)
- 2) Verify the following fields are correct: Job Code, Pay Plan, Occupational Series, Grade, Position Title, Department (Dept ID) and Location. “Transferred From” agency – enter code or use Lookup
- 3) See user guide “[Job Code Position Number User Guide](#)”
- 4) Click on the “Eligibility to Telework” field to select telework eligible. Uncheck the “Eligibility to Telework” field change the value to ‘No’ telework eligible.
 - a. NOTE: if the “Position Number” is not Telework eligible, even if the employee is eligible to Telework, the “Eligibility to Telework” field for that employee must be set to No/unchecked. Otherwise, the error below will appear and prevent saving/PRO’ing the action changes.

Message from webpage

The 'Eligibility to Telework' field at the position level is set to N. The field must be updated with the appropriate value before the save can occur.

The PeopleCode program executed an Error statement, which has produced this message.



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Benefits/FEHB Data hyperlink

- 1) Benefit Record Number – defaults to 0
- 2) Benefit Program – defaults to 'GVT'
- 3) FEHB Eligibility – If eligible for FEHB the “Permanent” radio button must be used – even if employee is temporary, defaults to 'Not Eligible'
- 4) FEHB Date - If employee is 'Not Eligible' for FEHB, enter the date on which they will qualify for the benefit.
- 5) “OK”, returns to Job tab

FEGLI/Retirement/FICA hyperlink

- 1) FEGLI Code – defaults to 'CO'; to modify use Lookup
- 2) Retirement Plan – use the “Lookup” or enter the appropriate code
- 3) FERS Coverage – select from the drop down menu, the default is blank
- 4) Previous Retirement Coverage – confirm or select from drop down menu, the default is “never covered”
- 5) Annuitant Indicator – use the “Lookup” or enter the appropriate code
- 6) Annuity Commencement Date – enter date, if applicable
- 7) CSRS Frozen Service – confirm or change (4 digits – years and months), the default is “0000”
- 8) FICA Status – change by using drop-down menu, the default is subject
- 9) “OK”, returns you to the “Job” tab

Position Tab

Data Control | **Personal Data** | **Job** | **Position** | **Compensation** | **Employment 1** | **Employment 2** |

EmpID: NEW Empl Rcd#: 0

Position Data Find | View All First 1 of 1 Last

Effective Date:	Transaction# /Seq	PAR Status: Requested
Action Type: Hire	NOA Code:	Empl Status: Active
LEO Position: <input type="text"/>	<input checked="" type="checkbox"/> SF-113G Ceiling	*Regular Shift: Not Applicable <input type="text"/>
POI: <input type="text"/>	Shift Rate/ Factor: <input type="text"/> <input type="text"/>	
*Pay Group: <input type="text"/>		
Pay Frequency:	*Work Period: W <input type="text"/>	Holiday Schedule: <input type="text"/>
Earnings Program:	Type Appt: Career (Competitive Svc Perm) <input type="text"/>	
*Employee Type: <input type="text"/>	Posn Occupied: <input type="text"/>	
Employee Classification: <input type="text"/>	Work Schedule: Full Time <input type="text"/>	
*Reg/Temp: Regular <input type="text"/>	*FLSA Status: (Invalid Value) <input type="text"/>	Job Indicator: Primary
Manager Level:	<input type="checkbox"/> Adds to FTE Actual Count	
Medical Officer:	*Standard Hours: <input type="text"/>	FTE: <input type="text"/>

- 1) Pay Group = confirm (based on pay plan)
- 2) Type Appt = confirm or select from the drop-down menu, the default is “Career (Competitive Svc Perm)” Note: The Employee Classification field is only used for Indian Preference,



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- 3) Verify other auto-populated fields are correct

Compensation Tab

EmplID: NEW Empl Rcd#: 0

[Data Control](#) [Personal Data](#) [Job](#) [Position](#) **Compensation** [Employment 1](#) [Employment 2](#) [CI Exceptions](#)

Find | View All First 1 of 1 Last

Effective Date: Transaction# /Seq PAR Status: Requested

Action Type: Hire NOA Code: Empl Status: Active

Pay Rate Determinant: Regular Rate Pay Basis: Per Annum

Pay Plan / Table/Grade: Step: 0 Step Entry Date:

Rtnd PP/Table/Grade: Step: 0 Grade Entry Date:

Quoted Pay

Base Pay: Compensation Frequency: Annual

Loc/LEO Adjust: 0.00 Annuity Offset Amount:

Adjusted Base Pay: Benefit Base Override FEGLI Base:

Total Pay:

[Other Pay Information](#) [Expected Pay](#) [Accounting Info](#)

- 1) Pay Rate Determinate – confirm or select from the drop-down menu, the default is “Regular Rate” (**System Edits** – If Special Rate, pay table must be a special pay table; if Regular Rate, pay table cannot be a special pay table)
- 2) Step – enter step or “0” for those employees that do not have a step, the default is “00”. GS, GR, GP must have step 1 thru 10.
- 3) After the step is entered the following fields will populate: Step entry date, Base Pay, Loc/LEO Adjust,
- 4) Adjusted Base Pay, Total Pay, FEGLI Base
- 5) Annuity Offset Amount – If employee is reemployed annuitant, enter annual amount
- 6) Base Pay – only open for entry for these pay plans: AD, ED, EE, EF, EG, EH and EI
- 7) Loc/LEO Adjust – for new employees on Market Pay, must process 894 Action.

Other Pay hyperlink (Only applicable to the WRD-FAU, Final Authorizers Unit)

- 1) Earnings Code – enter or select from Lookup
- 2) Pay Period Amount – enter (Quoted Annualized Amount and Expected Amount are displayed)
- 3) OK, returns to Compensation tab

Accounting Info hyperlink

- 1) Account Code – enter or select **CAN** code
- 2) OK, returns to Compensation tab



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Employment 1 Tab

Data Control Personal Data Job Position Compensation **Employment 1** Employment 2 CI Exceptions

EmpID: NEW Empl Rcd#: 0

Employment Data 1 Find | View All First 1 of 1 Last

Effective Date: Transaction# /Seq PAR Status: Requested
 Action Type: Hire NOA Code: Empl Status: Active

EOD Dt: Hire NTE Dt: Mand Retire Dt: [Exp Dates](#) [Filling Position Data](#)
 Rehire Dt: Separation Dt: Next Review Dt: [Appt Data](#)

Service Computation Dates		Service Conversion Dates	
*Leave: <input type="text"/> <input type="button" value="B1"/>	Retire: <input type="text"/> <input type="button" value="B1"/>	Conv Begin Date: <input type="text"/> <input type="button" value="B1"/>	
RIF: <input type="text"/> <input type="button" value="B1"/>	TSP: <input type="text"/> <input type="button" value="B1"/>	Career Conv Date: <input type="text"/> <input type="button" value="B1"/>	
LEO: <input type="text"/> <input type="button" value="B1"/>	Sev Pay: <input type="text"/> <input type="button" value="B1"/>	Career-Cond Conv Date: <input type="text"/> <input type="button" value="B1"/>	

Within-Grade Increase Data

WGI Status: Non-Pay Hours WGI: Last Increase Dt:
 WGI Due Date: LEI Date: Intermittent Days Worked:

For transfers and other EODs without a “break in service”, see the SF75

Service Computation Dates

- 1) Leave – confirm or change date, as appropriate
- 2) RIF – confirm or change date, as appropriate
- 3) Retire – confirm or change date, as appropriate
- 4) TSP – confirm or change date no earlier than 01-01-84, as appropriate
- 5) Sev Pay – confirm or change date, as appropriate

Service Conversion Dates

- 1) Conv Begin Date – enter date, if applicable (if appointment is due to be converted to another appointment on this specific date)
- 2) Career Conv Date – enter appropriate date (3 years from Career Conditional Appointment. Example: if CCA is 02-03-04, this date should be 02-03-07, if serving on a Career Conditional or converting to Career Conditional)
- 3) Career-Cond Conv Date – enter date, if applicable (this applies to those employees serving a 2 year Excepted Service Appointment who will be converted to a Career Conditional Appointment on this two year anniversary date) For Veterans' Recruitment Appointment (VRA) - the career-conditional conversion date should be 2 years after the EOD (Enter on Duty) Date

Within-Grade Increase Data Heading

- 1) WGI Status – defaults to “Waiting” unless step 10, then to “NA”
- 2) WGI Due Date – enter as appropriate (if step 10, leave blank)
- 3) Last Equivalent Increase (LEI) Date – enter as appropriate, usually the last promotion or pay increase date



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Filling Position Data hyperlink

- 1) Position Filled By - select from drop-down menu
- 2) OK, returns to Employment 1 tab

Appt Data hyperlink

- 1) Benefit Record Number - defaults to "0"
- 2) Special Employment Program – select from drop down menu, if applicable
- 3) Special Pay Indicator – if applicable, select from the drop-down menu. Example "T38" Premium Pay, T42 "AD" pay plan.
- 4) OK, returns to Employment 1 tab

Employment 2 Tab

- 1) Tenure – select from drop-down menu, there is no default

Probation Dates Heading

- 2) If person is currently serving their initial appointment on a "Probationary Date", "SES Probation Date" or, "Supv/Manager Probation Date" – enter the probationary **END** date in appropriate box.
- 3) Probation Date – enter completion date, if applicable
- 4) SES Probation Date - enter completion date, if applicable
- 5) Supv/Manager Probation Date - enter completion date, if applicable
- 6) Verify Bargaining Unit

Retained Grade Expires Heading

- 1) Enter the beginning and ending dates of grade retention.

Security Info hyperlink

- 2) Security Clearance – enter from info on OF-8, item 12
- 3) Financial Disclosure Required – Check checkbox if required, item 8 on OF-8
- 4) Click OK, returns to Employment 2 tab



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Data Control Tab

- 1) Click Save and document the EMPLID

Provide to the Quality Control Specialist for Review:

1. When the SF-52 is returned from Quality Control Specialist, update the record with any necessary changes and have someone change the PAR status to "PRO".
2. Click Save.
3. Health Benefits (for New Employees who are transferring with current FEHB enrollment) Note - If the employee has "Self & Family" Coverage, then data *can be entered (but not mandatory)* in the Dependent/Beneficiary section.
4. If Self-only, skip to 2nd Step.

1st Step - Adding Dependent/Beneficiary Data

Menu>Benefits>Update Dependent/Beneficiary

- 1) Name tab
- 2) Dependent/Beneficiary ID – auto generated
- 3) Effective date = FEHB effective date
- 4) Format type – default 'English'
- 5) Click 'Edit Name' hyperlink

Edit Name hyperlink

- Enter First Name, Middle Name, Last Name, and Suffix (if applicable)
- Click OK, returns to Name tab

Address Tab

- 1) Click box 'Same address as employee' or fill in data under 'Edit Address' (25 character limit)

Personal Profile Tab

- 1) Enter Date of Birth
- 2) Select 'Gender' of Dependent/Beneficiary
- 3) If you have it, National ID (SSN) (optional)
- 4) Save

Note: If additional dependents need to be entered, click the Name Tab. Click (+) on the Dependent/Beneficiaries tab to add another row of data and add the next dependent.

2nd Step

Menu>Benefits>Enroll in Benefits>Health Benefits

Health Benefits Elections Tab Capital HR **Plan Type** – Enter or use Lookup

- 1) Coverage Begin Date - actual effective date
- 2) Deduction Begin Date - defaults from Coverage Begin Date
- 3) Election Date – confirm or change date (effective date)
- 4) Coverage Election - verify the "ELECT" button is selected
- 5) Benefit Plan – enter or use Lookup



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- 6) Coverage Code – enter or use Lookup
- 7) Cost to Employee – confirm or change radio button
- 8) *(If SELF ONLY enrollment, or if you will not be adding dependent/beneficiary data, skip Dependents Tab)*
- 9) Dependents/Beneficiaries Tab ID (This field accesses the dependent's data entered on the Dependent/Beneficiary pages) *Note: If additional dependents need to be entered, Click (+) to add another row of data and add the next dependent. Repeat previous steps.*
- 10) Save

Savings Plan (TSP)

Menu >Benefits>Enroll In Benefits>Savings Plan

- 1) Plan Type – Confirm or use Lookup
- 2) Coverage Heading
- 3) Coverage Begin Date - hire date (for all)
- 4) TSP Status Date – date provided on SF-75 info
- 5) Deduction Begin Date - hire date (for all)
- 6) TSP Status Code – entry from SF-75 info
- 7) Coverage Election - defaults
- 8) Election Date - defaults
- 9) Benefit Plan - TSP1 for FERS, TSP2 for CSRS

Before Tax Investment (from SF-75 info)

Enter flat amount, or percent of gross

(OR)

After Tax Investment (ROTH) (from SF-75 info)

Enter flat amount, or percent of gross

Save

For Help Contact HRSS:

Submit a help desk ticket: <https://intrahr.od.nih.gov/helpdeskform.htm>

Email: hrss@nih.gov

Website: <https://hr.od.nih.gov/hrsystems/staffing/caphr/default.htm>

Try It at OnDemand: <http://webcastor.hrs.psc.gov/ehrp/EHRPTrainingManual/toc.html>