

# Adding Personnel (Add Personnel Wizard)

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Using the Add Personnel Wizard

**PATH:** *Human Resources > Personnel > Add Personnel Wizard*

The Add Personnel Wizard allows you to add new personnel to Campus. The wizard walks you through the process of entering general information, contact information, work assignments and qualifications.

The wizard may display different screens for different users. The screens that display are controlled by the user's tool rights. To use this tool, users must have [Social Security Number Tool Rights](#).

**Instructions**

**Personnel Search**

Search for Personnel that may already be tracked in Campus SIS using the fields provided. A minimum amount of data must be entered in order to search. Users MUST enter the full Last Name, full First Name, and Gender or Staff State ID.

Click "Create New Personnel" to add a new Personnel Master record for an individual.

Create New Personnel

<p>Last Name <input style="width: 100%;" type="text"/></p> <p>First Name <input style="width: 100%;" type="text"/></p> <p>Gender <input style="width: 100%;" type="text" value="v"/></p> <p>Birth Date <input style="width: 100%;" type="text"/> <input style="width: 20px; height: 20px;" type="button" value=""/></p> <p>Middle Name <input style="width: 100%;" type="text"/></p> <p>SSN # <input style="width: 100%;" type="text"/></p> <p>Staff State ID <input style="width: 100%;" type="text"/></p> <p style="text-align: center;"><span style="background-color: #cccccc; padding: 2px 10px;">Search --&gt;</span></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">Name</th> <th style="width: 15%;">Staff State ID</th> <th style="width: 10%;">Gender</th> <th style="width: 15%;">Birth Date</th> <th style="width: 10%;">%</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="height: 200px;"> </td> </tr> </tbody> </table>	Name	Staff State ID	Gender	Birth Date	%					
Name	Staff State ID	Gender	Birth Date	%							

*Add Personnel Wizard*

## Using the Add Personnel Wizard

### Before you Begin

Before you can add personnel, you must first set up Campus Human Resources. Setting up Campus Human Resources includes creating Position Codes, HR Codes, Status Codes, Bargaining Groups and Salary Schedules. The Add Personnel Wizard uses these codes to expedite the entry process.

Complete the following steps to add new personnel.

[Step 1. Search for Personnel](#) | [Step 2. Entering General and Contact Information](#) | [Step 3. Adding Qualifications](#) | [Step 4. Adding Work Assignments](#)

## Step 1. Search for Personnel

On the first screen of the wizard, search for personnel that may already be tracked in Campus SIS. When you search, personnel that exist in Campus SIS and Campus Human Resources display in the search results. Personnel that are already stored in Campus Human Resources display with an arrow next to their name on the right-hand side of the screen.

These fields are optional; however, they improve the search results.

- **Birth Date**
- **Middle Initial**
- **SSN #** (Social Security number)

**Instructions**

**Personnel Search**

Search for Personnel that may already be tracked in Campus SIS using the fields provided. Users **MUST** enter the full name for first and last name search criteria, required fields are in red. Click "Create New Personnel" to add a new Personnel Master record for an individual.

Create New Personnel

**Last Name\***

**First Name\***

**Gender\***

Birth Date

Middle Initial

SSN #

Staff State ID

Search -->

Name	Staff State ID	Gender	Birth Date	%
Smith, David Lee		M	04/26/1979	100
↗ Smith, David T	321	M	01/01/1969	100

Personnel that are already stored in Campus Human Resources display with an arrow next to their name.

Step 1--Personnel Search

If...	Then...
the person already exists in Campus Human Resources (indicated by the arrow next to their name)	click their name to edit their personnel record in Campus Human Resources.
the person already exists in Campus SIS	click their name and continue to <b>Step 2. Entering General and Contact Information.</b>
the person was partially entered using the wizard previously	click their name to continue entering personnel information in Campus Human Resources.
the person is a <a href="#">Non-employee Resource</a>	<p>click their name and continue to <b>Step 2. Entering General and Contact Information.</b></p> <p>Completing this step ends their Non-employee Resource assignment.</p> <p>If the wizard finds a future-dated Non-Employee Resource assignment for the person, a message displays asking whether you want to delete the assignment. To continue adding the new employee, the future-dated Non-Employee Resource assignment must be deleted.</p>
the person does not display in the search results	click the <b>Create New Personnel</b> button and continue to <b>Step 2. Entering General and Contact Information.</b>

## Step 2. Entering General and Contact Information

The General Information section allows you to enter confidential information, not tied to a specific work assignment, about a person employed by the district. The Contact Information editor allows you to enter personal, work, and emergency contact information. Keep the following items in mind when filling out fields on this screen:

- The Effective Date is the current system date and cannot be edited.
- If Auto-Personnel Numbering is set up on the District Master tab, you cannot edit the Personnel Number field.
- At least one phone number is required in the Personal Contact section.
- At least one address is required with the HR Mailing checkbox selected to indicate that Human Resource mailings and employee-related mailings should be sent to this address. If your district uses the Payroll module, the PR Residence checkbox must also be selected.

Primary Address

**New**

5551 Pine St  
Lino Lakes MN 55014

HR Mailing  SIS Mailing

Payroll Residence

\*Start 7/15/2010  End

**Instructions**

**New Personnel**

Create a new personnel master record. Complete the required HR General Information and Contact Information. Click Save and Continue to proceed.

HR General Information/Contact Information > Qualifications > Work Assignments

**Required Current Record**

**HR General Information -**

PersonID  \*Personnel Number  State Number

\*First Name John Middle Name  \*Last Name Smith

Nickname  Suffix  \*Birth Date  Age:

\*Social Security Number  \*Gender Male  \*Is the individual Hispanic/Latino?

I-9 on File  Background Check  FLSA Exempt

\*Status

Employment Type

\*Veteran

Retirement Information

**Retirement Information**

**Employment Dates**

**New**

\*Hire Date  \*Hire Status

Probation Type

Seniority Date  Tenure Date  Last Date Worked

Termination Date  Exit Reason

**Contact Information**

Households & Addresses

**Work Information**

Work Phone Number  Work Email

**Personal Information**

\*At least one phone number is required when no Household Home Phone is populated.

Other Phone Number  Personal Email

Cell Phone Number  Pager

**Emergency Contacts**

For more detailed information about the fields on this screen, see the articles [Managing General Information](#) and [Managing Contact Information](#).

If...	Then...
the New Qualifications screen displays	Go to <b>Step 3. Adding Qualifications</b> .
the New Work Assignments screen displays	Go to <b>Step 4. Adding Work Assignments</b> .
the <a href="#">HR General Information</a> displays in the Personnel Master	you have finished using the wizard.

## Step 3. Adding Qualifications

Qualifications are a staff member's education, licensure and work history. Qualification information is useful for determining which courses a staff member may teach and scheduling teachers and other personnel for subsequent school years. You can enter multiple qualifications for a staff member. For example, the staff member may be highly qualified in two subject areas or may have multiple degrees.

Entering qualifications is optional; however, for detailed accountability reporting (i.e., Federal EDEN reporting and NCLB data collection) each staff member should have the proper qualifications entered.

### Qualification Categories

- **ED: Education.** The Education Credential is used to track a staff person's education level.
- **HQ: Highly Qualified.** The **Subject Type** for which the staff person is highly qualified and the **Subject Matter Competency**.
- **LC: Licensure/Certification.** The staff person's English Learners (EL), Special Education settings and other non-instructional licensing and/or certification that may be received. This option also allows you to enter endorsements related to the license/certification. You may enter an unlimited number of endorsements.
- **WH: Work History.** The staff person's past and current work experience.

For more detailed information about the fields on this screen, see the article [Managing Qualifications](#).

Click the **Next** button to skip this step.

This screen only displays if you have access to the [Qualifications](#) screen. If you do not see this screen, continue to Step 4. Adding Work Assignments

**Instructions**

**New Qualifications**

Create a new Qualification records to track Education, Highly Qualified, Licensure/Certification or Work History. Click New to create a new Qualification record, select the applicable Qualification Category and click Save to create a new record.

HR General Information/Contact Information > **Qualifications** > Work Assignments

Filter On Qualification Category: All

Qualification Category	Type	Start Date	End Date
Highly Qualified		09/01/2002	

**Qualifications Details**

\*Qualification Category

- ED: Education
- HQ: Highly Qualified
- LC: Licensure/Certification
- WH: Work History

*Step 3--Qualifications*

If...	Then...
the New Work Assignments screen displays	Go to <b>Step 4. Adding Work Assignments</b> .
the <a href="#">HR General Information</a> displays in the Personnel Master	you have finished using the wizard.

## Step 4. Adding Work Assignments

The Work Assignment describes the position a person holds within a district as well as the agreed-upon terms of employment. If your district uses the Campus Payroll module, fields specific to Campus Payroll will display. See the article, [Work Assignments \(Payroll\)](#) for more information. If you entered Qualifications (Step 3. Adding Qualifications), you can assign them to the work assignment.

For more detailed information about the fields on this screen, see the article [Managing Work Assignments](#).

This screen only displays if you have access to the [Work Assignments](#) screen.

**Instructions**

**New Work Assignments**

Create new Work Assignments for personnel. Click New to create a new Work Assignment entry, click Save to store the new record. Qualifications can be associated with a Work Assignment if already entered. When all Work Assignments entries have been completed and saved, click "Finish" to exit.

HR General Information/Contact Information > Qualifications > Work Assignments

New Assignment Back Save Finish

**Work Assignment Editor**

Active	Position Description	Primary Location	Start Date	End Date

**Work Assignment Details**

\*Position Code/Description

\*Start Date                      End Date                      Primary  
                                           

Assignment Code

\*Primary Location                      Primary Sub-Location  
                     

\*At least one is required

Department:

\*Percent

*Step 4--Work Assignments*

**Required Fields**

See the [Managing Work Assignments](#) article for more information about these fields.

Field	Description
<b>Position Code/Description</b>	The options that appear in this dropdown field are set up on the <a href="#">Position Codes</a> tab. The Position Code you select may automatically update other fields on this screen.
<b>Start Date</b>	The date on which the employee started this work assignment.

Field	Description
<b>Primary</b>	<p>This checkbox indicates whether the position is the employee's primary position.</p> <p>It is strongly recommended that each person have <b>one</b> position with the <b>Primary</b> checkbox marked. The Personnel Master tool includes this field to further identify a person when searching for employees. If your district uses the Campus Payroll module, Campus will automatically mark the first assignment you enter as the Primary work assignment. This can be changed once multiple work assignments have been entered.</p> <p>To help identify the primary work assignment, a "(P)" displays next to the work assignment on the Work Assignment Editor.</p>
<b>Primary Location and Percent</b>	<p>The main location where this person is working and the percent of time at the location.</p> <p>The locations that display in this field are set up on the HR Codes tab.</p>
<b>Work Locations</b>	All location(s), including the Primary Location, where this person will be working. You may select more than one location.
<b>EEO Category</b>	The EEO Category for the work assignment.
<b>GL Account Number</b>	The General Ledger account to which you want to record the distribution of salary funds.
<b>Percent</b>	The percent allocated to the account.

The following required fields only display if your district uses the Campus Payroll module. See the [Work Assignments \(Payroll\)](#) article for more information.

Field	Description
<b>Benefit Plan</b>	This field determines the default benefit deductions to assign to the employee. Options in this field are set up in the Campus Payroll module.
<b>Conversion Plan</b>	Conversion Plans tell the Payroll system how to calculate various salary amounts for this position; e.g., daily, weekly, monthly, hourly and annual amounts. Conversion Plans are defined in the Campus Payroll module.
<b>Earn Plan</b>	This field determines the default earn plan to be assigned to an employee in this position. Earn Plans are defined in the Campus Payroll module.



Field	Description
<b>Pay Frequency</b>	The frequency with which this position is paid. Options include the following: <ul style="list-style-type: none"> <li>• BW: Biweekly</li> <li>• M: Monthly</li> <li>• SM: SemiMonthly</li> <li>• W: Weekly</li> </ul>

The following fields are required if your district uses [Position Control](#).

Field	Description
<b>Position FTE</b>	This field displays the Full-Time Equivalent the individual is working on the work assignment.
<b>GL Account Number</b>	The General Ledger account to which you want to record the distribution of salary funds. The Position Code may include default information for this field; however, you can change the default information at any time.