

About Template-Based Hire (TBH) in Human Resources PeopleSoft



Reference Guide

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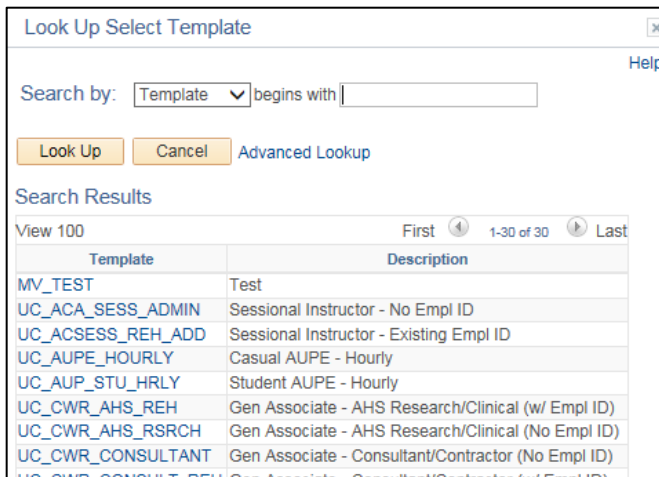
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Introduction

The Template-Based Hire (TBH) transaction in Human Resources PeopleSoft is used when you are hiring or rehiring for a job that does not involve Faculty or Unit recruiters or the recruitment process. It is also used to add an additional job to an existing employee.

When to Use a TBH

Listed below are the **appointment types that use the template-based hire process** at the University of Calgary. On the Template-Based Hire page you will see a similar list when you select the type of template from the drop down menu. Your PeopleSoft security setup and the job duties you perform at the university will determine whether you see only some or all of the templates listed here.



Template	Description
MV_TEST	Test
UC_ACA_SESS_ADMIN	Sessional Instructor - No Empl ID
UC_ACSESS_REH_ADD	Sessional Instructor - Existing Empl ID
UC_AUPE_HOURLY	Casual AUPE - Hourly
UC_AUP_STU_HRLY	Student AUPE - Hourly
UC_CWR_AHS_REH	Gen Associate - AHS Research/Clinical (w/ Empl ID)
UC_CWR_AHS_RSRCH	Gen Associate - AHS Research/Clinical (No Empl ID)
UC_CWR_CONSULTANT	Gen Associate - Consultant/Contractor (No Empl ID)
UC_CWR_CONSULT_REH	Gen Associate - Consultant/Contractor (w/ Empl ID)

Template Name	Used for the Following Positions
For new hire use UC_ACA_SESS_ADMIN For a rehire use UC_ACSESS_REH	Academic Sessional <ul style="list-style-type: none"> Term Certain Sessional (excluding International)
<ul style="list-style-type: none"> AUPE Hourly AUP STU HRLY 	AUPE Support Staff - Hourly (Operating or Project Funded - excluding Recurring part-time) <ul style="list-style-type: none"> Casual employee Student job
<ul style="list-style-type: none"> CWR AHS REH CWR AHS RSRCH CWR CONSULTANT CWR CONSULT REH CWR DVLC CWR POSTDOC CAN CWR POSTDOC INT CWR QATAR CWR VISPROF CAN CWR VISPROF INT 	General Associates or Associates – Limited Access (contractors)* <ul style="list-style-type: none"> AHS Research/Clinical Consultant/contractor (contingent worker) Distributed Veterinary Learning Comm. Visiting Scholar (excludes Research) Qatar local hire Guest Postdoc <p>*These are non-employee relationships</p>



FHOB0 HOURLY <ul style="list-style-type: none"> FHOB0 SALARIED 	Funds Held on Behalf of Others
<ul style="list-style-type: none"> GRADASSIST GRADASSIST SS GRAD RSRCH HRLY 	Graduate Assistants <ul style="list-style-type: none"> Teaching (GSGAT) Non-Teaching (GSGANT) Graduate Assistantship GSGAR– Research Hourly
<ul style="list-style-type: none"> NAPI HRLY 	NAPI Ambassadors Hourly (Indigenous Elders)
<ul style="list-style-type: none"> NONCLSFD HRLY NONCLSFD SALAR 	Non Classified: (Salaried or Hourly) <ul style="list-style-type: none"> Non-credit Teaching (NCTEAC) Reader/Demonstrator (RDR123)
<ul style="list-style-type: none"> POSTDOC GRAD <p>*TBH initiated by the Postdoc office or HR</p>	Postdoctoral Scholars <ul style="list-style-type: none"> Postdoctoral Fellowship (PDF175) Postdoctoral Associate (PDF162)
<ul style="list-style-type: none"> POST GRAD 	Post Graduates <ul style="list-style-type: none"> Medicine (PGME) Vet. Med (PGVET)
<ul style="list-style-type: none"> STUPRG HRLY STUPRG SAL 	Student Programs Undergrad (Operating or Project) <ul style="list-style-type: none"> Canada Summer Job Summer Temporary Employment Program (STPP) Community Resident Assistant Co-op student
<ul style="list-style-type: none"> STU SCHOLR ID STU SCHOL NO ID 	Scholarship <ul style="list-style-type: none"> Undergrad Scholarship (UNDSCH) Grad Scholarship (PRJ002) Project Grad Scholarship (GSSCH) Operating
<ul style="list-style-type: none"> VIS RES SCHOL 	Visiting Researcher Scholar Job (VISSLR)

Accessing the Template-Based Hire Page

Templates are housed under the **People management** menu in Human Resources PeopleSoft.

To access the template location from the myUofC Portal:

- Click **My work** from the ribbon menu.
- Under People management, click **Template-based hire**.

The **Add Template-Based Hire** screen is displayed.

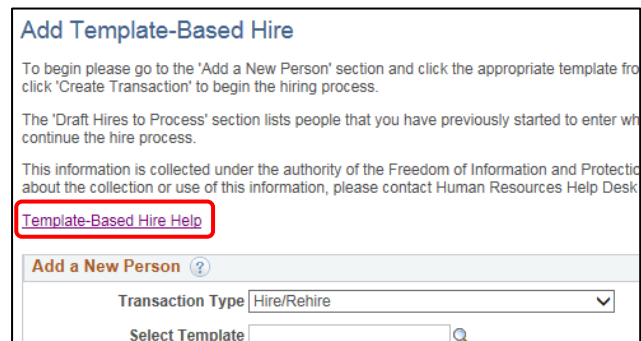
Dashboard ▾	All about me	My work
People management Manager self service Job opening request Template-based hire 2. Manage applicants My team learning Job Profile Database Onboarding checklists	Finance & Supply Chain Payment Selector Tool Create a Payment Request Create expense report Manage expenses Create requisition Manage requisitions Pending approvals	Travel 1. Policy & procedures Travel & expense card Book travel International travel & risk Team travel Mobile phone roaming Vehicle Rentals

Template-Based Hire Security and Help

To initiate a TBH, specific PeopleSoft security roles are required. These should have been set up for you, but if they haven't you can find which roles you need for which templates and other helpful information, such as which templates to use and when, by clicking the Template-Based Hire Help link on the Add Template-Based Hire screen.

After clicking the Template-Based Hire Help link, the Training and Development homepage appears.

On this page are links to documents that take you through the TBH process for each of the available template types.

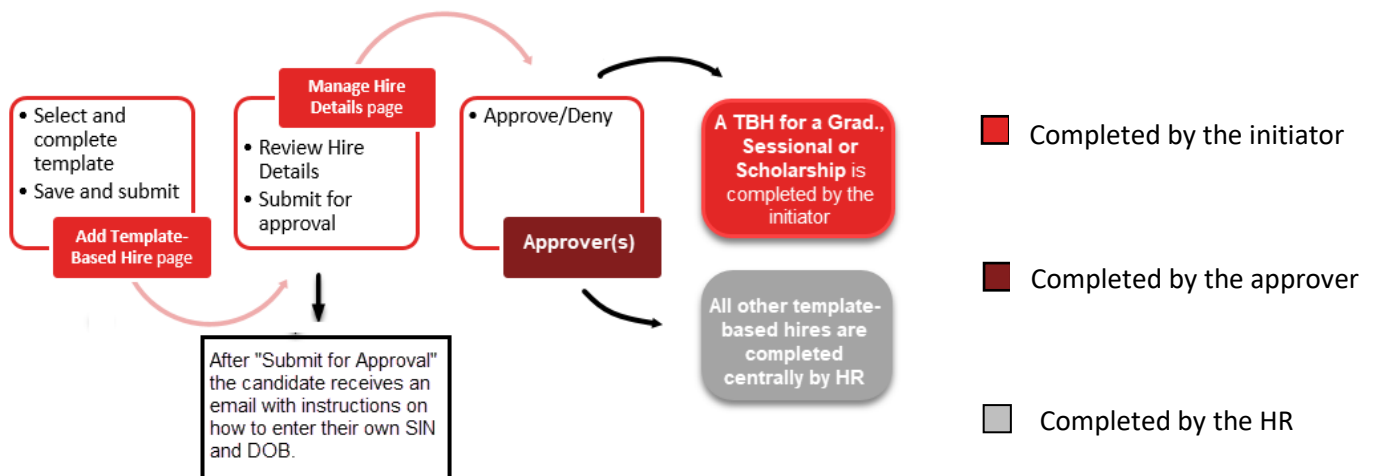


Templates

Mandatory fields on each template are marked with an asterisk (*).

Template-Based Hire Process

The graphic below explains this process:



Template-Based Hire Process and Approvals

Template-based hires are created by an initiator with the department/faculty, with the exception of PostDocs which are done by the PostDoc office.

Once created, the templates go through an approval process. Approvers generally consist of Department Budget Owners, Project Budget Owners or Reporting Managers. Some templates may also require other approvals from areas such as Compliance & Eligibility or Position Management.

Once approved, most template-based hires will be finalized by HR.

Grads, Sessionals and Scholarships templates are completed and hired by the initiator. **Scholarship** template-based hires do not require approvals. Once the candidate provides their SIN and DOB (date of birth) through the SIN Self-Service process (if applicable), the initiator completes the TBH (i.e. clicks the Person & Job Update button), and the job record is created. Scholarship payments are entered separate from the hire and these payment are approved by the Budget Owner.

Approvals Overview

- A TBH for a **salaried** job is approved by the Budget Owner.
- A TBH for an **hourly** job is approved by the Reports-To Manager and the Department Budget Owner is notified.
- A TBH for a **Sessional Instructor or a Grad student** is approved by the Department Budget Owner.
- A TBH for a **Scholarship or a GAR** does not require approval.

A contact/summary is automatically generated on completion of the TBH.

Pay Rates/Salary Tables

Support Staff casual and student employee salary rates are listed in schedule A of the AUPE (Alberta Union of Provincial Employees) Collective Agreement. When changes are made to salary scales they become effective April 1st of each year.

Graduate student stipend and salary scales are listed in Schedule A of the Grad Student Association Collective Agreement. Administrators should refer to this information when initiating a TBH. When changes are made to grad student salary scales, they become effective May 1st of each year.

Term certain (Sessional) salary schedules are listed in Schedule B of the Faculty Association Collective Agreement. Administrators should refer to this information when initiating a TBH. When changes are made to Sessional salary scales, they become effective July 1st of each year.