

Cancel and Delete a Template-Based Hire (TBH)

Purpose: There are specific scenarios under which you can cancel and subsequently delete a Template-Based Hire (TBH) that is no longer required.

Audience

Budget Owners and University of Calgary employees with the Reports to Manager or HR Forms Initiator security role in Human Resources PeopleSoft.

Note: Only the person who initiated the TBH can access and cancel it.

Prerequisites:

Must be logged in to the My UCalgary portal.

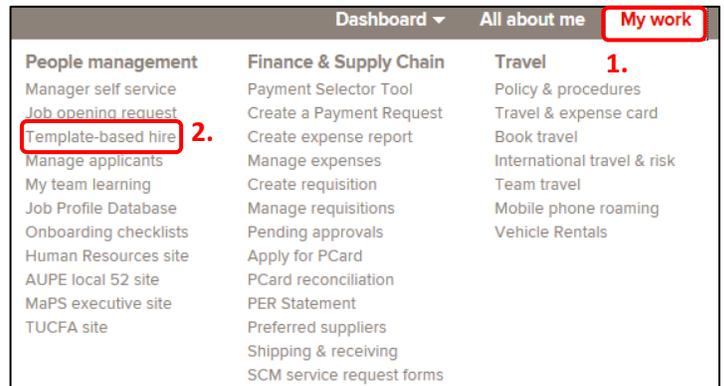
After a TBH is initiated it will move through three stages; (1) Draft, (2) Workflow/Approval and (3) Hired. The process to cancel or delete a TBH is dependent on what stage it is at, and the type of template used (e.g. Scholarship and Grad Assistant Research - or GAR - have unique characteristics). The following 3 sections will help you identify the stage a TBH is at and subsequently how to cancel/delete a TBH that is no longer required.

1) DRAFT STAGE

The draft stage is when a TBH has been initiated and the *Save for Later* button is selected. To identify if the TBH is in draft stage (and to subsequently delete it), use the following steps.

Step 1: Access the Add Template-Based Hire page.

1. From the myUofC portal, click **My work**.
2. Under People management, click **Template-based hire**. The **Add Template-Based Hire** screen is displayed.





Cancel and Delete a Template-Based Hire (TBH)

The **Draft Hires to Process** section will display any TBH transactions that are still in in draft form.

Add Template-Based Hire

To begin please go to the 'Add a New Person' section and click the appropriate template from the 'Look Up Select Template' menu, then click 'Create Transaction' to begin the hiring process.

The 'Draft Hires to Process' section lists people that you have previously started to enter who are currently in draft status. Select a name to continue the hire process.

This information is collected under the authority of the Freedom of Information and Protection of Privacy Act. If you have any questions about the collection or use of this information, please contact Human Resources Help Desk at (403) 220-5932.

Click the on-screen Help link at the top right of the page to access available training resources.

Add a New Person

Transaction Type: Hire/Rehire
 Select Template: [Search]
 Create Transaction

Transaction Type: Hire/Rehire
 Refresh

Draft Hires to Process Personalize | Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	HIRE	2016/06/01	Jane Sample	NEW	Add Gen Assoc	Canada

Delete Selected Transactions

- If the TBH you are searching for is;**
- **listed in the Drafts Hires to Process section proceed to → step 2**
 - **not listed proceed to → section 2) Workflow/Approval Stage**

Step 2: If the TBH is listed under **Drafts Hires to Process** use the following steps to delete it. This also applies to a GAR and Scholarship TBH.

Important!
 Once a cancelled TBH is deleted from the Draft Hires to Process section, it can never be retrieved, so be sure that this is something you want to do!

1. Locate the TBH you would like to delete and click the **Select** box after double checking the information is for the correct individual.
2. Click the **Delete Selected Transactions** button. The template for the employee/student is deleted and cannot be retrieved.

Draft Hires to Process Personalize | Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input checked="" type="checkbox"/> 1.	HIRE	2016/06/01	Jane Sample	NEW	Add Gen Assoc	Canada

Delete Selected Transactions 2.

End of Process



2) WORKFLOW/APPROVAL STAGE

The TBH is in the workflow/approval stage when it is submitted for processing (i.e. you clicked the **Submit for Approval** button on the Manage Hire Details page) and is **still pending approval**. To identify if the TBH is in the workflow/approval stage, and subsequently delete it, follow these steps.

Step 1: Access the *Manage Hire Details* screen to bring up the TBH.

1. From the myUofC portal, click **My work**.
2. Under People Management, select **Manager Self Service**.
3. Under Job and Personal Information, select **Template-Based Hire**.
4. Click on **Manage Hire Details**

Step 2: Locate the TBH

1. Enter either the
 - o request number or the
 - o EMPL ID or
 - o the name
2. Click **Search**.

Important! Ensure the correct TBH is selected from the search results!

Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value

Search Criteria

Request ID = []

Template Sequence = []

Template begins with []

Hire Request Status = []

Empl ID begins with []

First Name begins with []

Last Name begins with []

Department begins with []

Location Code begins with []

Search [] Clear Basic Search Save Search Criteria

Enter one search criteria



Step 3: Check the Hire Status on the Manage Hire Details page

A) When the TBH appears on the **Manage Hire Details** page and the Hire Status shows as **Requested** - this indicates the TBH is pending approval and can still be cancelled. **Proceed to Step 4** to cancel the request.

- Note: For a **Scholarship or GAR TBH** - if the Hire Status is **Requested** and the **Cancel Request** button is still **enabled**, the TBH can be cancelled. Proceed to Step 4.

B) If the TBH does not appear on the **Manage Hire Details** page (the search resulted in no matches found), this indicates the TBH was approved by all approvers and is no longer accessible. Proceed as follows.

If the TBH is for a Scholarship	If the TBH is for a GAR	For all other TBH
Scholarship records will automatically terminate after a period of inactivity. To terminate immediately send an email request to hrops@ucalgary.ca . End of Process	The Reports to Manager will need to initiate an online Job Termination Request . End of Process	Proceed to section 3) Hired stage to check the Template-Based Hire Status page.

Step 4: Cancel a TBH that shows a Requested status (pending approval) on the Manage Hire Details page.

1. On the **Manage Hire Details** page, enter a reason for the cancellation (e.g. Assistantship no longer required due to low registration) in the **Approval Comments** text field. You are unable to cancel a TBH without entering a reason.

2. Select **Cancel Request**.

The TBH is returned to the *Draft Hires to Process* section on the Add Template-Based Hire

page and can now be deleted in the next step. Note: Canceling the request does not delete the transaction. **Proceed to step 5.**



Step 5: Delete the Template-Based Hire

1. Access the Add Template-Based Hire page. From the myUofC portal, click → My work, and → Template-Based-Hire.
2. From the **Draft Hires to Process** section, select the TBH you would like to delete.
2. Click the **Delete Selected Transactions** button. The template for the employee/student is deleted and cannot be retrieved.

Add Template-Based Hire

To begin please go to the 'Add a New Person' section and click the appropriate template from the 'Look Up Select Template' menu, then click 'Create Transaction' to begin the hiring process.

The 'Draft Hires to Process' section lists people that you have previously started to enter who are currently in draft status. Select a name to continue the hire process.

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Add a New Person ?

Transaction Type: Hire/Rehire
Select Template: [Search] [Create Transaction]

Transaction Type: Hire/Rehire [Refresh]

Draft Hires to Process Personalize | Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/> 1.	HIRE	2016/06/01	Jane Sample	NEW	Add Gen Assoc	Canada

Delete Selected Transactions 2.

3. Email the approver informing the cancellation is complete.

End of Process



3) Hired Stage

When the TBH does not show on the Manage Hire Details screen, check the **Template-Based Hire Status** page to confirm if the status is **Hired/Added** or **Requested** (pending). Navigate to the **Template-Based Hire Status** page (from the myUofC portal, click My work. Under People Management, select Manager Self Service → Job and Personal Information → Template-Based Hire → Template-Based Hire Status).

1. You can also navigate from the **Add Template-Based Hire** screen. Select **Template Based Hire Status**.

2. Click the **HR Review Status** dropdown and select **All**. If you process a high volume, you may want to refine the search by inserting a date range.
3. Click Refresh.

Select	Transaction Type	Effective Date	Transaction Status	Name	Person ID	Action
<input type="checkbox"/>	Hire/Rehire	2019/01/01	Hired/Added	Employee Name		Hire

4. If the status shows **Hired/Added** the Reports to Manager will need to initiate an online [Job Termination Request](#). Note this also applies to a GAR TBH.

Note: Template-Based Hires appear in the [Manager's standard reports](#) the day after they are processed by HR Operations. **End of Process**