

Initiate a Template-Based Hire – Funds Held on Behalf of Others (FHOB), Hourly

Purpose: This reference guide takes you through the process of hiring or rehiring an individual into an hourly job with a Funds Held on Behalf of Others (FHOB) organization.

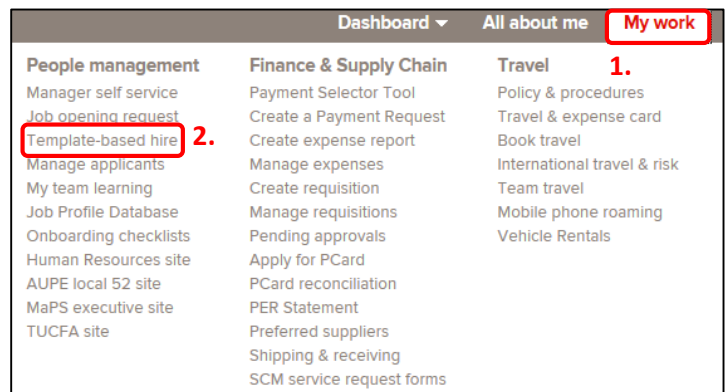
Audience: University of Calgary employees with the Reports to Manager or HR Forms Initiator security role in Human Resources PeopleSoft.

- Prerequisites:**
- Must be logged in to the myUofC portal.
 - Must have performed a Search/Match for the individual ([Click here for Search/Match Quick Reference Guide](#))
 - Must have the individual’s personal information and job details on hand.

Step 1: Access Template-Based Hire Screen

1. From the myUofC Portal, click **My work**.
2. Under People management, click **Template-based hire**.

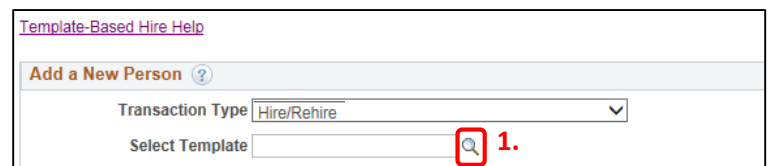
The **Add Template-Based Hire** screen is displayed.



Step 2: Access Template Selection

1. Click the **Look up Select Template button (magnifying glass)** next to the **Select Template** field.

The **Look up Select Template** window is displayed.



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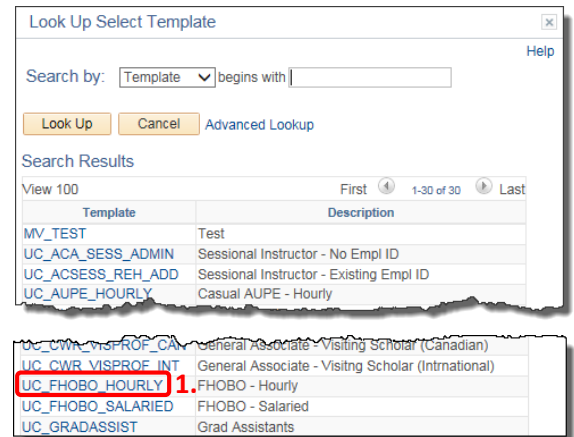
Reference Guide

Step 3: Select Template

The templates displayed are specific to the types of hires Reports to Managers/HR Forms Initiators perform. You may have more or fewer templates visible depending on your HR security roles.

1. Click the **UC_FHOB_HOURLY** link.

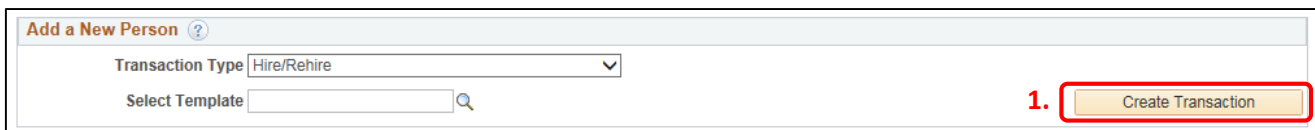
You are returned to the **Add Template-Based Hire** screen.



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_CWR_VISPROF_CAN	General Associate - Visiting Scholar (Canadian)
UC_CWR_VISPROF_INT	General Associate - Visiting Scholar (International)
UC_FHOB_HOURLY	FHOB - Hourly
UC_FHOB_SALARIED	FHOB - Salaried
UC_GRADASSIST	Grad Assistants

Step 4: Create Transaction

1. Click the **Create Transaction** button.



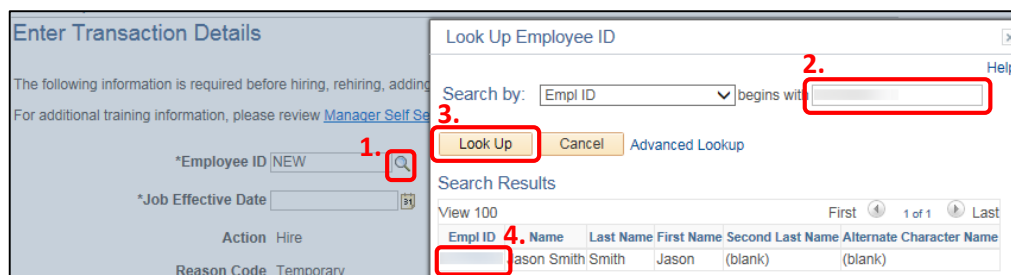
You will arrive at the **Enter Hire Details** screen.

Step 5: Enter Transaction Details

How you complete the **Enter Transaction Details** screen depends upon whether you are entering a rehire or a new hire:

For a **Rehire** (where the person **has** an Employee or Student ID):

1. Click the **Look up Employee ID button (magnifying glass)** next to the **Employee ID** field.
2. Enter the employee ID you located while performing a Search/Match.
3. Click **Look Up**.
4. Click on the ID in the **Empl ID** column.



Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
[Red Box]	Jason Smith	Smith	Jason	(blank)	(blank)

For a **Hire** (where the person **does NOT have** an Employee or Student ID):

1. Leave the default NEW in the Employee ID field.

Enter Transaction Details

The following information is required before hiring, rehiring, adding, or renewing a Person.
For additional training information, please review [Manager Self Service](#) eLearning.

1.

The next stage in the process is the same for both a Rehire or a Hire.

1. Click the **Choose a date button (calendar)** next to the **Job Effective Date** field.
2. Select either the 1st or the 16th of the month to coincide with a new pay period.
3. Click **Continue**.

*Job Effective Date 1.

Action Hire

Reason Code Temporary

3.

Note: The action field defaults to **Hire**. If this is a rehire, the field will automatically adjust once the template is saved.

Step 6: Complete Enter Personal Info Tab

1. On the **Enter Personal Info** tab, complete the following fields:
 - a. **First Name**
 - b. **Last name**
 - c. **National ID (SIN#)**
2. Click the **Personal Info cont.** tab.

Note: If you are performing a **Rehire**, these fields will automatically be filled in. Verify that the information is correct before proceeding.

Note:

If entering a **900 series Social Insurance Number**, you must complete ALL fields in the **Validation of Person** section. The Visa/Permit Number is located in the top left corner of the permit. This number typically starts with a U and is a smaller number. It is NOT the number in red in the top left corner.



Step 7: Complete the Personal Info cont. Tab

1. On the **Personal Info cont.** tab, complete the following fields:
 - a. **Date of Birth**
 - b. **Gender**
 - c. **Address Line 1**
 - d. **City**
 - e. **Province**
 - f. **Postal Code**
 - g. **Telephone Number**
 - h. **Email Address**
(optional but recommended)
2. Click the **Enter Job Info** tab.

Remember: If you are performing a **Rehire**, these fields will automatically be filled in. Verify that the information is correct before proceeding.

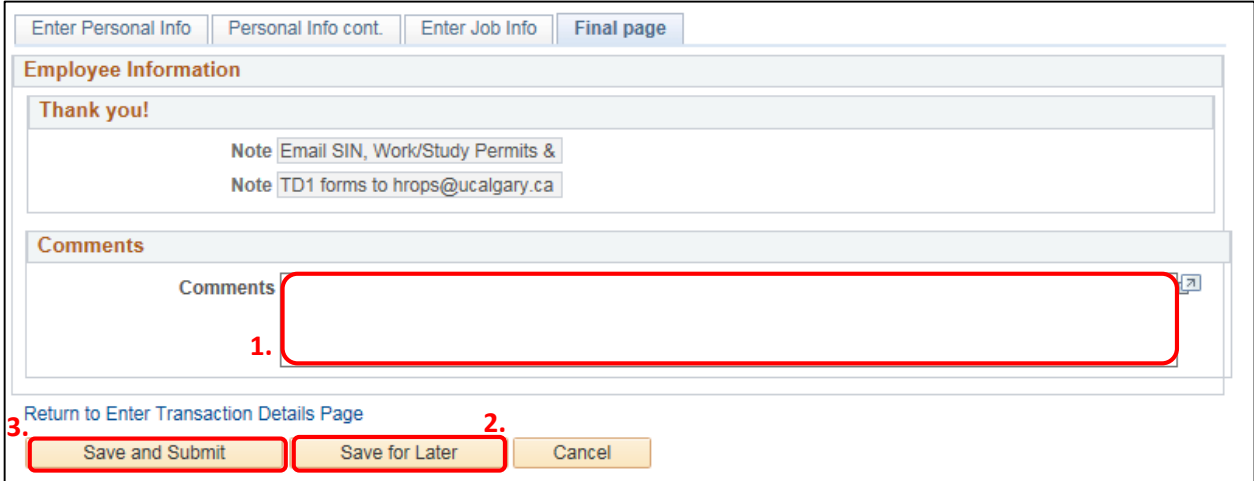
Step 8: Complete the Enter Job Info Tab

1. Confirm **FHOB** defaults in the **Business Unit** field.
2. Enter the correct department information into the **Department** field. This is the department number under which the individual will be working.
3. Confirm the **Job Code** defaults to **FHOB - Hourly**.
4. Click the **Look up Reports To Position Number** button (magnifying glass) to specify the Reports to Manager for this position. You can search by business title, department, first name, last name and position number. When you search by position number, you can verify who holds that position to ensure you select the correct position.
5. Enter the correct hourly **Compensation Rate**.
6. Enter an appropriate **Business Title**.
7. Click the **Final Page** tab.

Enter Personal Info	Personal Info cont.	Enter Job Info	Final page 7.
Employee Information			
TBH Start Date		Job Effective Date 2016/06/01	
Work Location - Job Fields			
Business Unit	FHOB 1.	*Department	<input type="text"/> 2.
Job Information - Job Code			
Job Code	FH00H 3.		
Job Information - Reporting Information			
*Reports To Position Number	<input type="text"/> 4.		
UC Job Compensation - Pay Components			
Comp Rate Code	Default NA Hourly	Compensation Rate	<input type="text"/> 5.
Employment - Organizational Assignment Data			
*Business Title	<input type="text"/> 6.		
Benefit Program - Participation			
Benefit Program	N/A		

Step 9: Complete the Final Page Tab

1. **(Optional)** Use the **Comments** field to provide additional information to approvers in the automated approval workflow.
2. **(Optional)** Use the **Save for Later** button to save up to this point and return later via the Drafts Hires to Process section on the Template-Based Hire page.
3. Click **Save and Submit**.



Enter Personal Info | Personal Info cont. | Enter Job Info | **Final page**

Employee Information

Thank you!

Note Email SIN, Work/Study Permits &
Note TD1 forms to hrops@ucalgary.ca

Comments

Comments 1.

Return to Enter Transaction Details Page

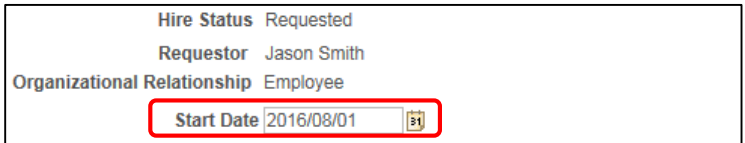
3. 2.

Manage Hire Details Page


The information entered into the template is now transferred to the Manage Hire Details page. This provides you with an opportunity to review and validate your entries prior to submitting for approval.

Always double-check the Start Date just in case you accidentally entered the wrong date. Should you need to adjust any information, you can click the Cancel Request button. This returns the template to the Draft Hires to Process list on the Add Template-Based Hire page. From here, the template can be edited and resubmitted.

You can review hire details by clicking the View Template button in the top right corner of the Manage Hire Details page. Once again, should you need to adjust any information, you can exit the View Template screen, return to the Manage Hire Details page and click the Cancel Request button to edit and resubmit the template.



Hire Status Requested
Requestor Jason Smith
Organizational Relationship Employee
Start Date 2016/08/01

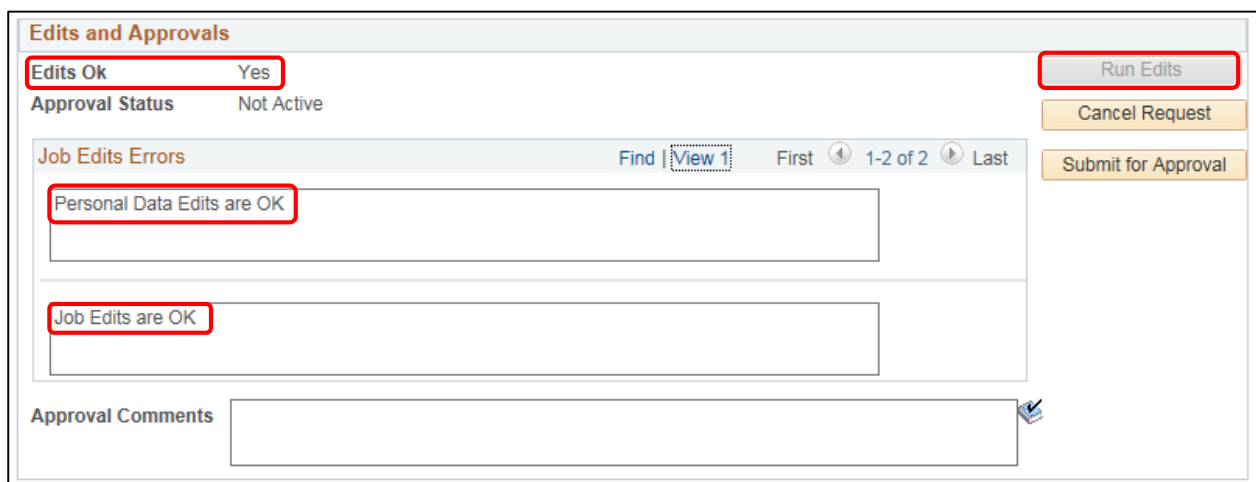


The **Run Edits** button provides a final verification of your data entries. This button runs a process to ensure that the date you entered is valid for the appointment type being hired. To perform this process, begin by clicking **Run Edits**.

If this is a new hire, click the **View All** link to view both Person and Job edits.

Upon validating your entries, and if the edits pass, the following messages are displayed:

- **Edits Ok** = Yes
- **Job Edits Errors (1)** = Personal Data Edits are OK
- **Job Edits Errors (2)** = Job Edits Errors are OK



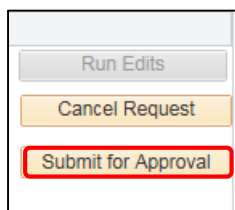
The screenshot shows the 'Edits and Approvals' section of a web application. At the top left, 'Edits Ok' is set to 'Yes'. Below it, 'Approval Status' is 'Not Active'. On the right side, there are three buttons: 'Run Edits' (highlighted with a red box), 'Cancel Request', and 'Submit for Approval'. The 'Job Edits Errors' section contains two entries: 'Personal Data Edits are OK' and 'Job Edits are OK', both highlighted with red boxes. At the bottom, there is an 'Approval Comments' text area.

If the edits fail, the following messages are displayed:

- Edits Ok = No
- Job Edits Errors (1&2) – In these sections you receive a PeopleSoft message explaining the error (e.g. Planned Exit Date cannot be before Entry Date).

At this point, you would click the Cancel Request button, review your entries and make corrections as required. Contact HR Help at 220-5932 or via hr@ucalgary.ca if the source of the job edit error is unclear.

Once the edits are ok, click Submit for Approval.



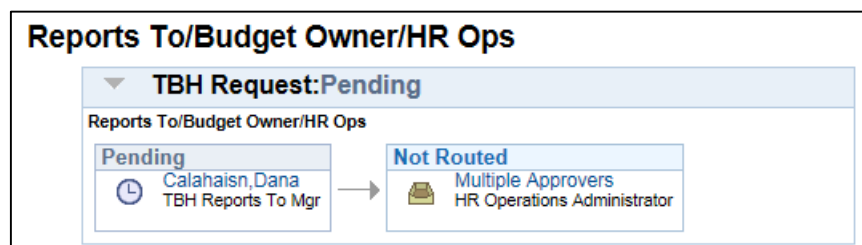
A close-up view of the three buttons from the previous screenshot: 'Run Edits', 'Cancel Request', and 'Submit for Approval'. The 'Submit for Approval' button is highlighted with a red box.

TBH Approval Workflow

The TBH Approval Workflow displays the status of the TBH Request as Pending.

The status remains Pending until all approvers sign into PeopleSoft and approve the transaction. At which point, the status changes to Approved.

An approver's name is displayed in the approval box, followed by any other required reviews and approvals.



The process is now complete.

Results

Completion of this transaction results in the following:

- An email notification is sent to the approver (the FHOB organization's Executive Director/Project Manager) alerting him/her that a Template-Based Hire requires approval.
- Upon approval, HR Operations processes the TBH to create the **FHOB – Hourly** job record.

Next Steps

Once you have completed this transaction, perform the following:

- Navigate to the **Template-Based Hires Status** page (**Manager Self Service → Job and Personal Information → Template-Based Hire → Template-Based Hire Status**) to confirm that the TBH is displayed under the Pending Hires section. It will remain there until HR Operations processes it.
- Template-Based Hires appear in the Manager's standard reports the day after they are processed by HR Operations