

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

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

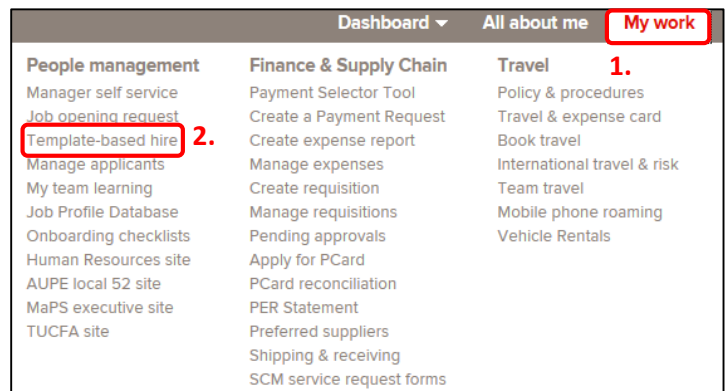
Audience: University of Calgary employees with the Reports to Manager or HR Forms Initiator security role in Human Resources PeopleSoft.

- 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.
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Step 1: Access Template-Based Hire Screen

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

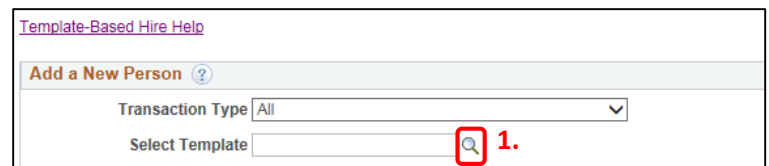
The **Add Template-Based Hire** screen is displayed.



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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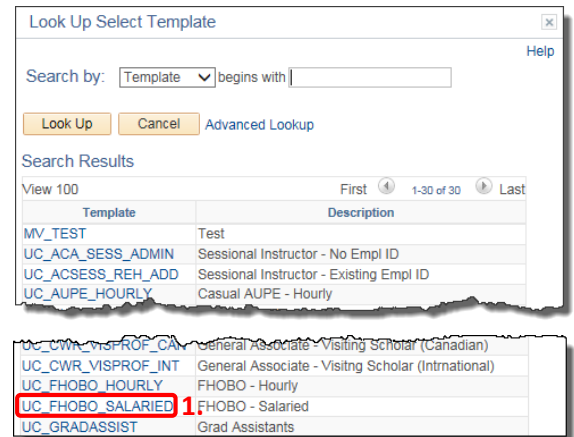
Reference Guide

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_SALARIED** link.

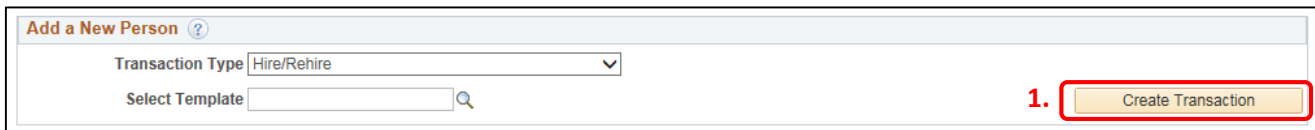
You are returned to the **Add Template-Based Hire** screen.



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.



Transaction Type: Hire/Rehire

Select Template: [Search]

1. Create Transaction

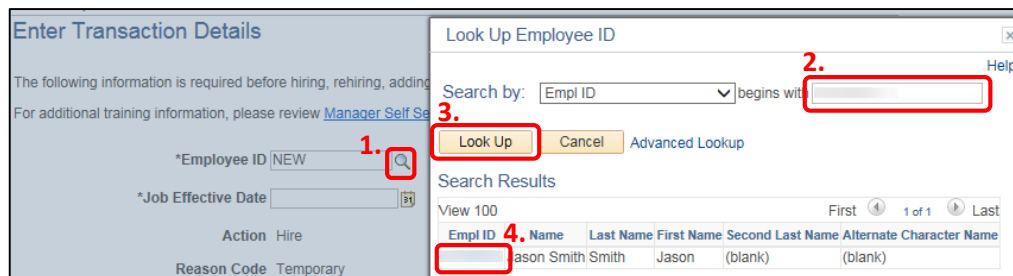
You will arrive at the **Enter Hire Details** screen.

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. Search for the employee ID you located while performing a Search/Match.
3. Click **Look Up**.
4. Click on the ID in the **Empl ID** column.



1. [Magnifying Glass Icon]

2. [Search Input Field]

3. Look Up

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

4. [Red Box]

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 the hire date for your employee.
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.

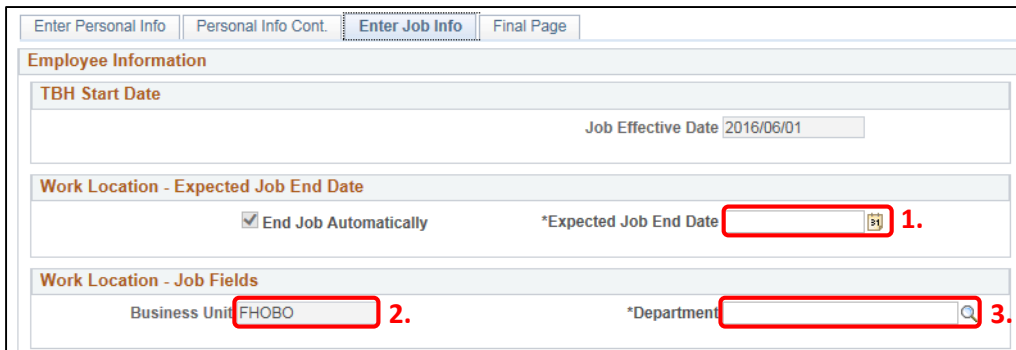
Step 7: Complete the Personal Info cont. Tab

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.

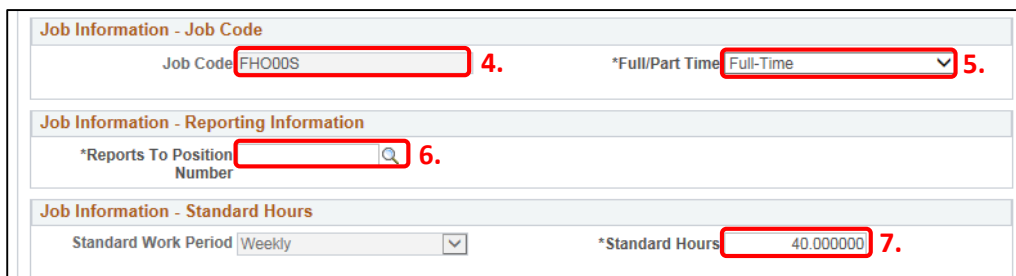
Remember: If you are performing a **Rehire**, these fields will automatically be filled in. Verify that the information is correct before proceeding.

Step 8: Complete the Enter Job Info Tab

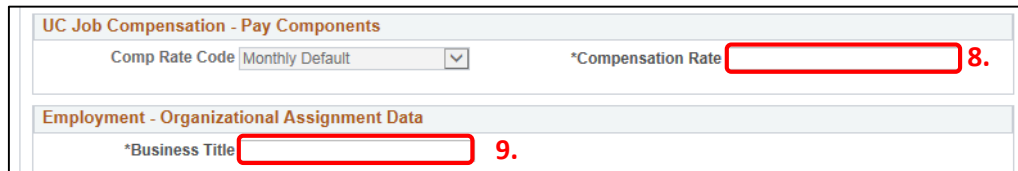
1. The End Job Automatically checkbox is pre-selected, so you must enter the **Expected Job End Date**. If you do not enter an Expected Job End Date, the template cannot be submitted.
2. Confirm **FHOB** is defaulted in the **Business Unit** field.
3. Enter the correct department information into the **Department** field. This is the department number under which the individual will be working.



4. Confirm **FHOB - Salaried** is defaulted in the **Job Code** field.
5. Click the **Full/Part Time** dropdown and make the applicable selection.
6. 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.
7. Adjust the **Standard Hours** if the person will be working less than 40 hours.



8. Enter the correct salaried **Compensation Rate**.
9. Enter an appropriate **Business Title**.

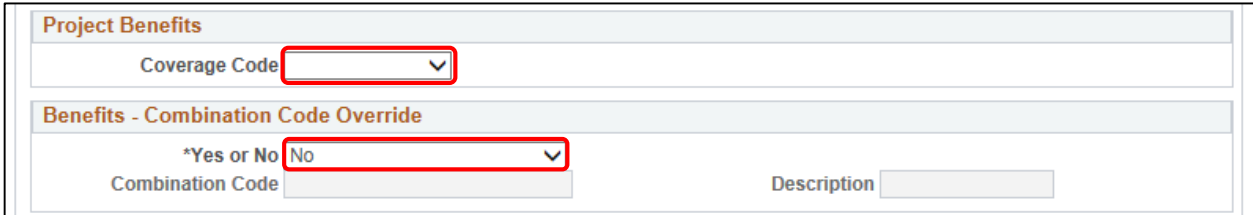


10. Complete the **Project Benefits** and **Benefits – Combination Code** fields if required.

The **Project Benefits** and **Benefits – Combination Code** sections are to be completed when the individual is eligible for benefits coverage and the **benefits are being charged to a different ChartField than the salary**.

The **Coverage Code** dropdown indicates the type of benefits coverage (Single or Family).

The **Benefits – Combination Code Yes/No** dropdown is used to indicate **YES** so that you can enter the ChartField to which benefit claims will be charged. **Use only when benefits are not being charged to the salary ChartField.**



The screenshot shows two form sections. The first section, titled "Project Benefits", contains a "Coverage Code" dropdown menu. The second section, titled "Benefits - Combination Code Override", contains a "*Yes or No" dropdown menu with "No" selected, a "Combination Code" text input field, and a "Description" text input field. Red boxes highlight the "Coverage Code" and "*Yes or No" dropdown menus.

11. Complete the **UC Job – Earnings Distribution** section if applicable.

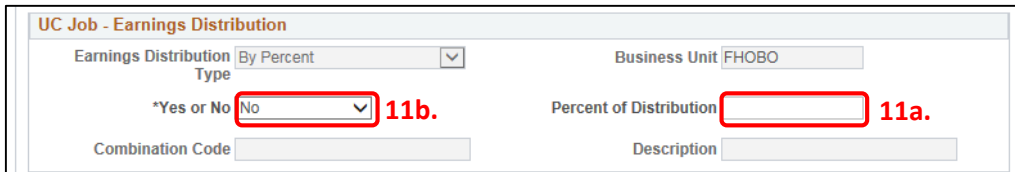
The **UC – Job Earning Distribution** section is where you specify how the student’s earnings will be distributed. Within this section, you can split the student’s salary by percentage across multiple ChartFields if/when required, or add an internal code.

For example, if you are distributing earnings across two ChartFields, you complete this section for the first ChartField and the percentage of the distribution.

You then proceed to the next section (2) and complete that section for the second ChartField and the remaining percentage of distribution.

To complete this section:

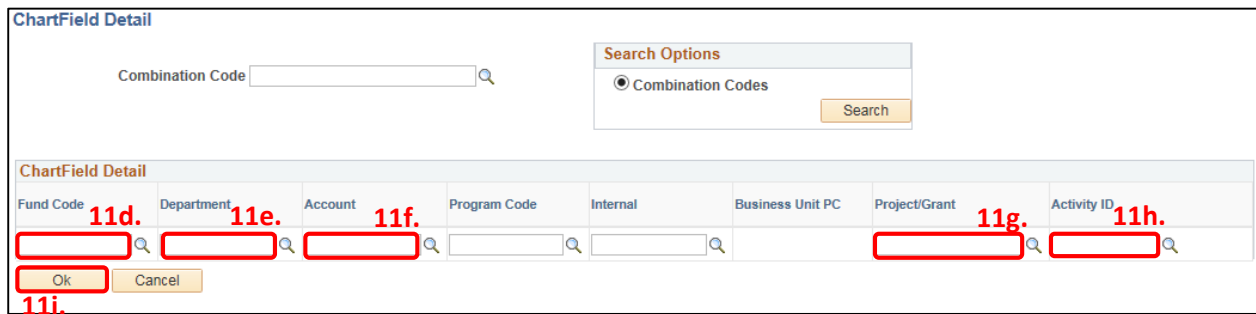
- Enter the **Percent of Distribution** field. This is 100% if you are not splitting the earnings.
- Click the **Yes or No** list dropdown.
- Select YES.



The screenshot shows the "UC Job - Earnings Distribution" form. It includes an "Earnings Distribution Type" dropdown set to "By Percent", a "Business Unit" text input field containing "FHOB", a "*Yes or No" dropdown menu with "No" selected (labeled "11b."), and a "Percent of Distribution" text input field (labeled "11a."). There are also "Combination Code" and "Description" text input fields. Red boxes highlight the "*Yes or No" and "Percent of Distribution" fields.

The ChartFields screen displays. Complete the following fields:

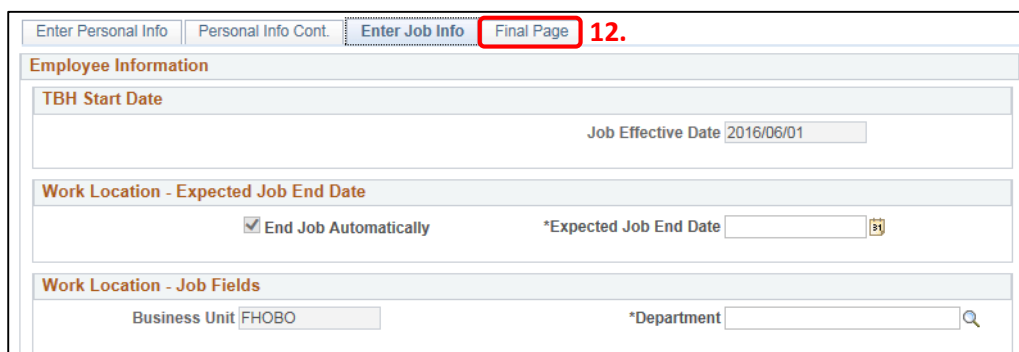
- d. **Fund Code**
- e. **Department**
- f. **Account**
- g. **Project/Grant**
- h. **Activity ID**
- i. Click **Ok**.



Do NOT enter a Combination Code. Enter the ChartFields and PeopleSoft will populate the correct Combination Code based on your entries.

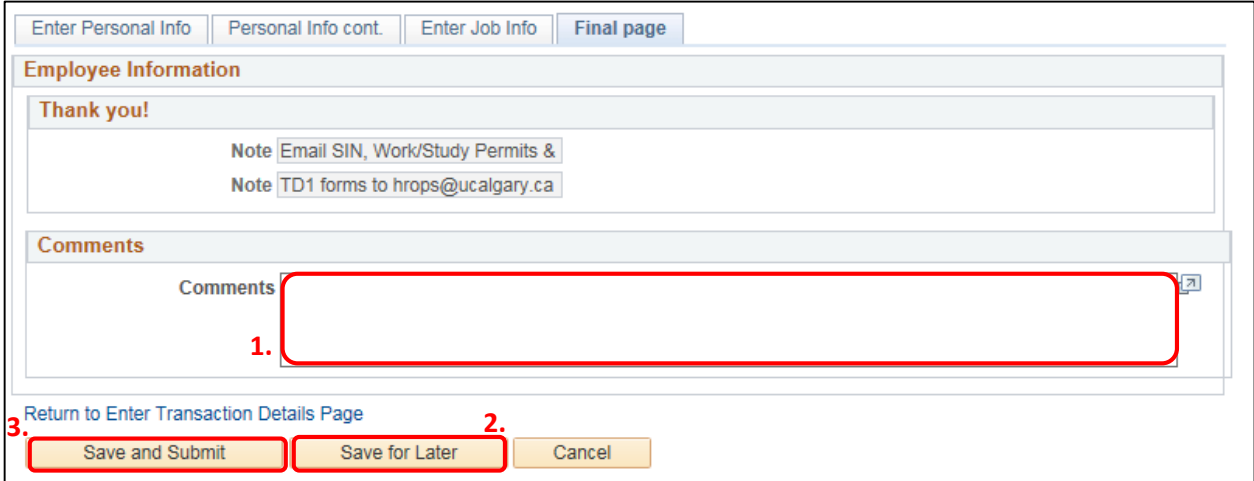
You are returned to the **Enter Job Info** tab.

- 12. Click the **Final Page** tab.



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**.



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.

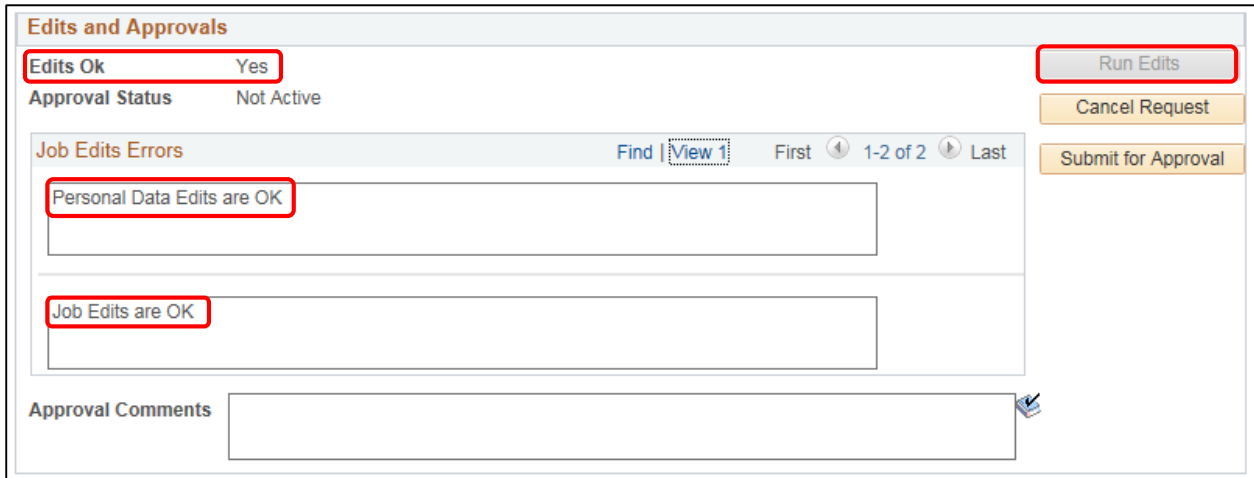


The **Run Edits** button provides a final verification of your data entries. This button runs a process to ensure that the date you entered is valid for the appointment type being hired. To perform this process, begin by clicking **Run Edits**.

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



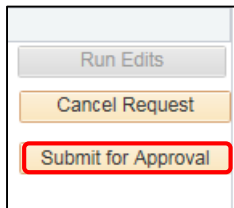
The screenshot shows the 'Edits and Approvals' section of a web application. At the top, 'Edits Ok' is set to 'Yes' and 'Approval Status' is 'Not Active'. A 'Run Edits' button is highlighted with a red box. Below this, the 'Job Edits Errors' section shows two messages: 'Personal Data Edits are OK' and 'Job Edits are OK', both highlighted with red boxes. A 'Find | View 1 | First 1-2 of 2 Last' navigation bar is visible. On the right side, there are three buttons: 'Run Edits' (highlighted), 'Cancel Request', and 'Submit for Approval'. At the bottom, there is an 'Approval Comments' text area with a small icon to its right.

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.



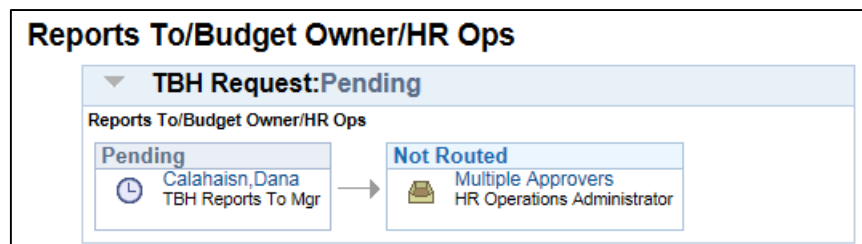
A close-up view of the button area from the previous screenshot. It shows three buttons stacked vertically: 'Run Edits' (disabled), 'Cancel Request', and 'Submit for Approval' (highlighted with a red box).

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 – Salaried** 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