Initiate a Template-Based Hire
Academic Sessional

Reference Guide

Initiate a Template-Based Hire – Academic Sessional AC0046/47

Purpose:

This reference guide takes you through the process of hiring or rehiring an **Academic Sessional instructor** using job code AC0046 and AC0047 (for Music).
This process is for Canadian and Permanent Resident Sessional hiring.

If you are hiring a non-Canadian Sessional, please refer to the hiring steps described here https://www.ucalgary.ca/hr/hiring-non-canadian-sessionals. For questions on this process, please contact the HR Contracts team at hrcontracts@ucalgary.ca.

Audience:

University of Calgary employees with the Sessional Administrator security role in Human Resources PeopleSoft.

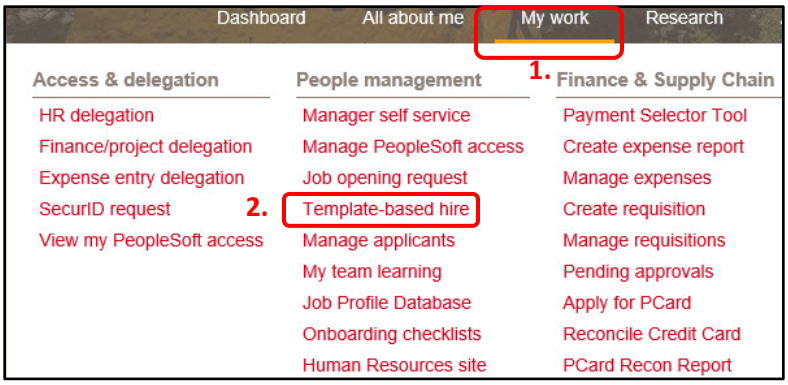
Prerequisites:

- Must be logged in to the myUofC portal.
- Must have the instructor's Empl ID, job details and accounting information on hand
- Must have referred to Schedule B in the Faculty Association Collective Agreement for salary schedule information. When changes are made to sessional salary scales, they become effective July 1st of each year

Step 1: Access Template-Based Hire Screen

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

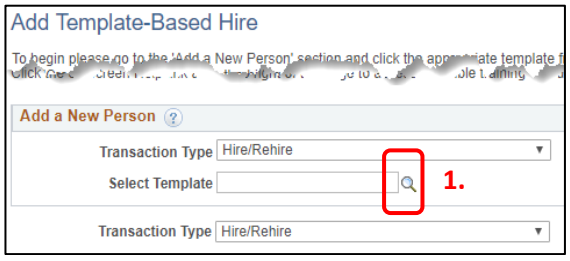
The **Add Template-Based Hire** screen is displayed.



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.



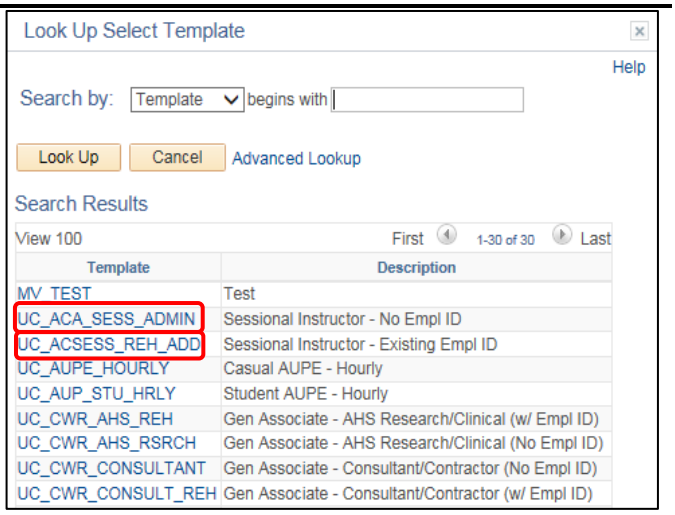
Step 3: Select Template

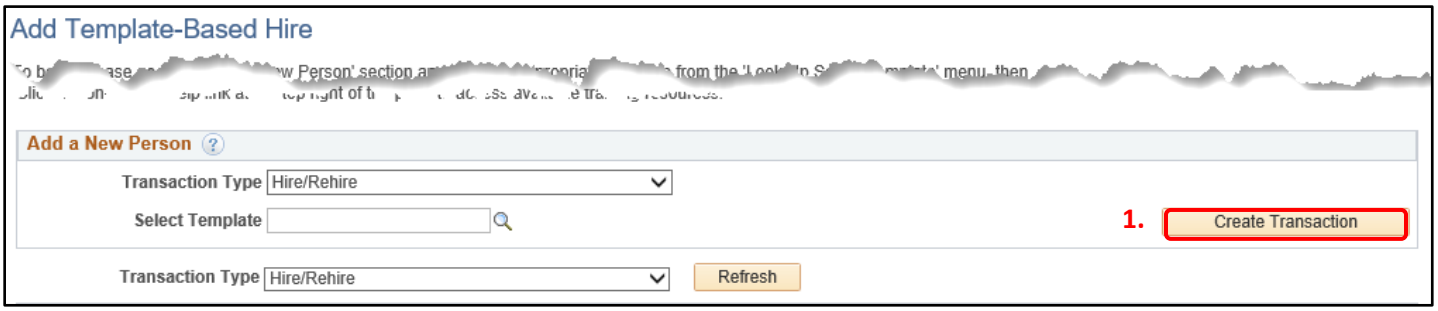
The templates displayed are specific to the types of hires Reports to Managers/HR Forms Initiators perform. You may have more or fewer templates visible depending on your HR security roles.

Select either A or B as appropriate.

A. For a **new hire** select the **UC_ACA_SESS_ADMIN** link.
B. For a **rehire** select the **UC_ACSESS_REH_ADD** link.

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





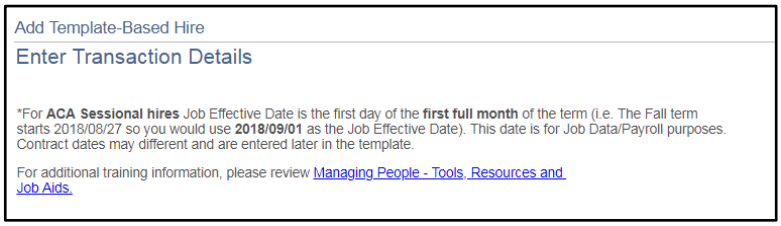
Step 4: Create Transaction

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.



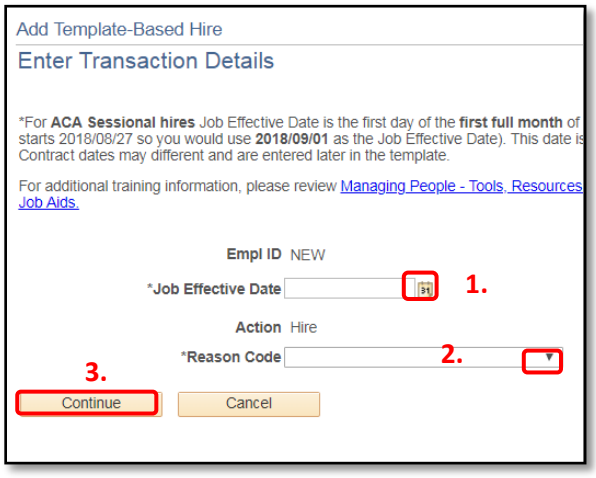
Step 5: Enter Transaction Details Continued

FOR A NEW HIRE – no existing ID

The Empl ID defaults to NEW.

1. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select the 1st of the month.
2. Click the **Reason Code dropdown** and select a reason code.

   Each code and its definition is listed in the Faculty Association Collective Agreement, Article 23.2 (HR Website → Administrators → Agreements). **Do not select Aca Term Certain K.**
3. Click **Continue**.



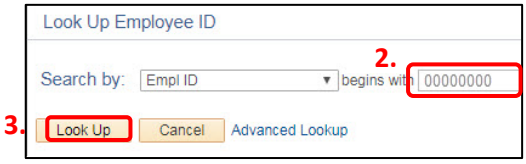
Proceed to Step 6.

To Rehire someone with an Existing Employee/Student ID

You will require the **existing employee ID**.

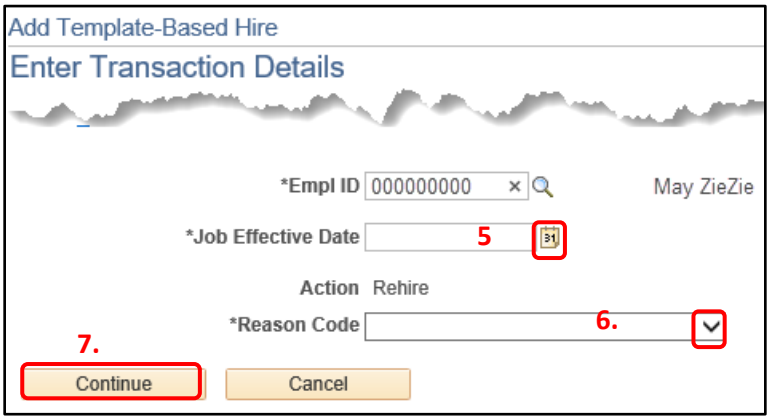
1. Click the ***Look up Employee ID*** **button (magnifying glass)** next to the **Employee ID** field

2. Enter the **employee ID**.
3. Click **Look Up**.



4. In the **Search Results** click on the ID in the **Empl ID** column.

5. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select the 1st of the month.
6. Click the **Reason Code dropdown** and select a reason code.
7. Click **Continue**



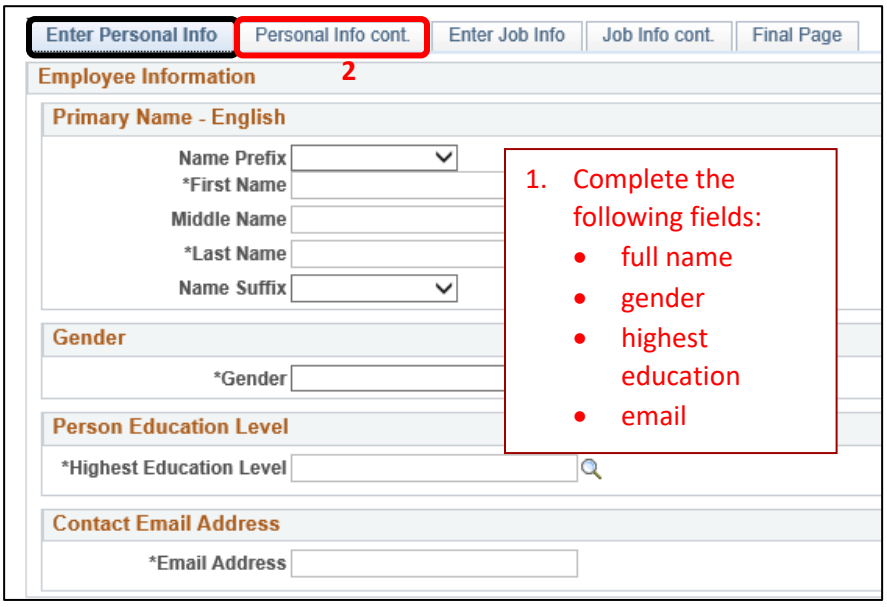
Step 6: Complete *Personal Info* Tab

1. On the **Enter Personal Info** tab, complete the following fields:
   a. **First Name**
   b. **Last name**
   c. **Gender**
   d. **Highest Education Level**
   e. **Email address**
2. Click the **Personal Info cont.** tab.

Here's are some tips for you!

The fields with an * (asterisk) are mandatory.

Use the Tab key on your keyboard to move to the next field.



Note: If you are performing a **Rehire**, these fields will automatically be filled in

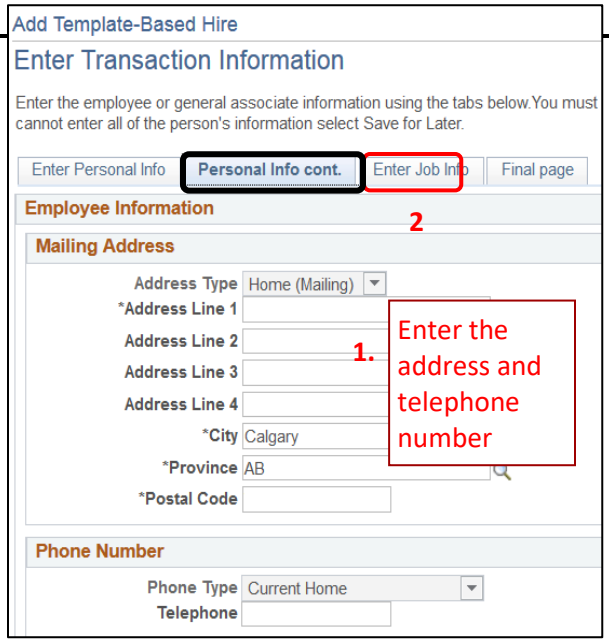
Step 7: Complete the Personal Info cont. Tab

On the **Personal Info cont.** tab, complete the following fields:

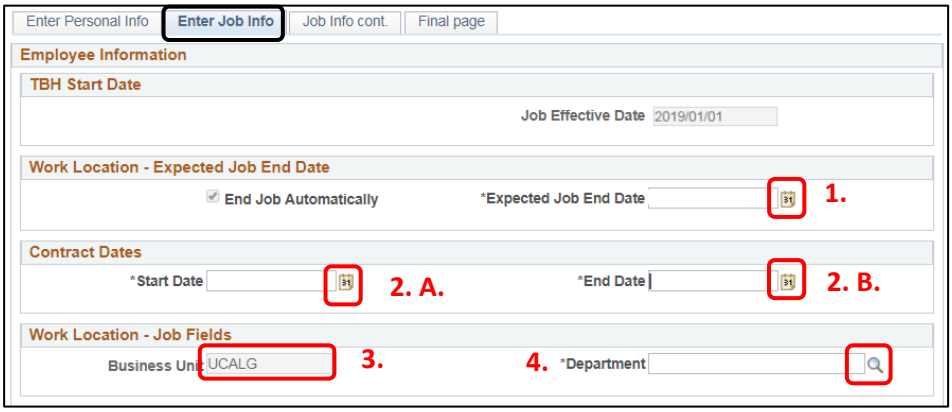
   a. **Address Line 1**
   b. **City**
   c. **Province**
   d. **Postal Code** (format _ _ _space_ _ _)
   e. **Telephone Number**

2. Click the **Enter Job Info** tab.

Remember: If you are performing a **Rehire**, these fields will automatically be filled in.



Step 8: Complete the Enter Job Info Tab

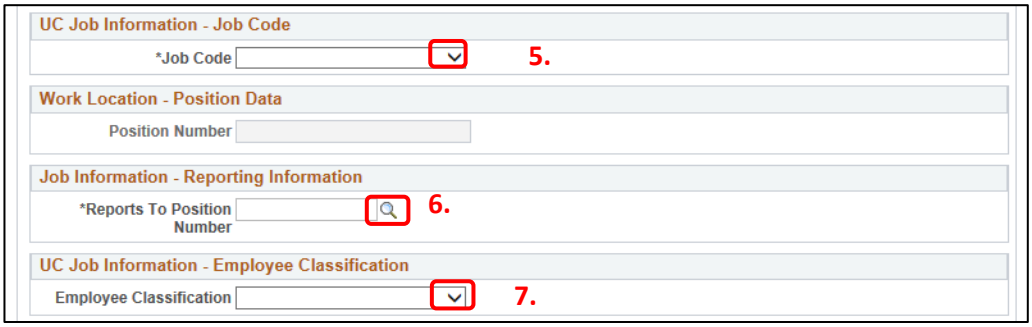


1. The End Job Automatically checkbox is pre-selected, so you must enter the **Expected Job End Date**. This should be the last day of the month in which the instructor is employed. Typically, an Academic Sessional contract is four or eight months in length.

2. Enter the **Contract Start** and **End** Date for the contract/summary (the dates may differ for the fall term).

3. Confirm **UCALG** is defaulted in the **Business Unit** field.

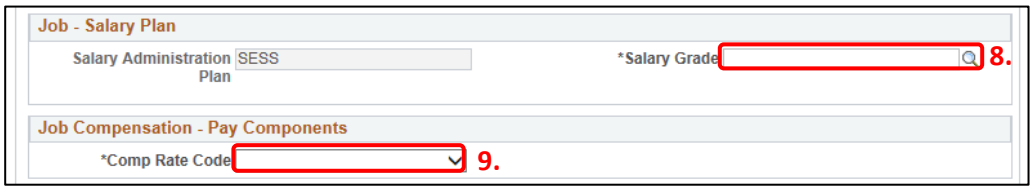
4. Enter the correct department information into the **Department** field. This is the department number under which the individual will be working. This can be different from the department to which his/her salary is charged. You must have security access to this department in order to see the hire in your reports. Complete a PeopleSoft Access Request if you know that you do not have access.



5. Click the **Job Code** dropdown and select **AC0046 – Sessional Instructor or AC0047 for Musicians**.

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.

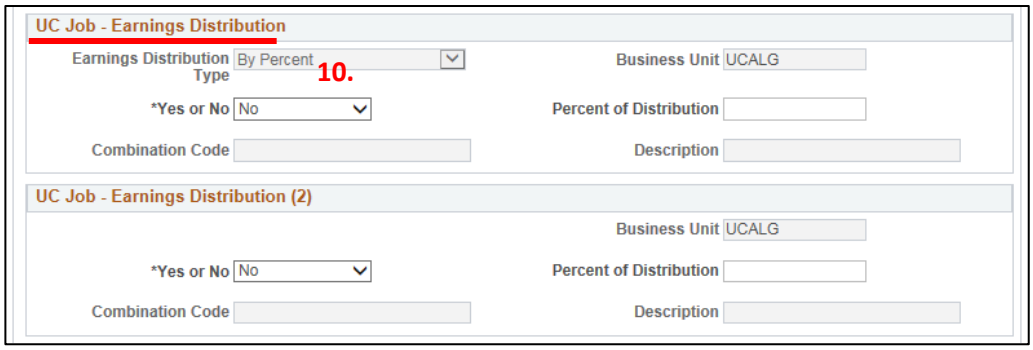
7. If required, click the **Employee Classification** dropdown and make your selection. **Note: Sessional Adj/Teaching** is for an Adjunct that has teaching duties – select this employee classification only if it applies.



8. Click the **Salary Grade** search button and make your selection**.** This defines the step under which the sessional instructor will be paid and drives allowable compensation. Steps are defined in Schedule B of the Faculty Association Collective Agreement.

9. Click the **Comp Rate Code** dropdown and select the length of the Semester. This is the full compensation rate for the entire term. The rate code you select should correspond with the appointment duration (e.g. a four month appointment would be SEM4M, a two month appointment would be SEM2M, etc…).

10. Complete the **UC Job – Earnings Distribution** section if required.



The UC Job – Earnings Distribution section is where you specify how the person's earnings will be distributed. Within this section, you can split the person'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 first section for the first ChartField and the percentage of distribution.

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

Leave the entire UC Job – Earnings Distribution section AS IS if you are not distributing the person's earnings or charging the earnings to a different ChartField. When you click the Save and Submit button, your ChartFields will default.

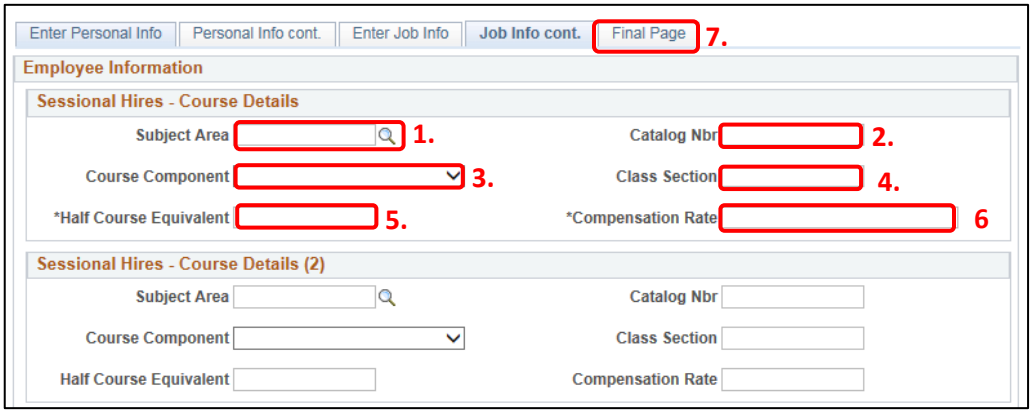
11. Click the **Job Info cont.** tab.

Step 9: Complete the Enter Job Info Cont. Tab

Refer to Schedule B in the Faculty Association Collective Agreement for the correct minimum pay rate. This will ensure that the correct minimum pay rate is used for the applicable academic year.

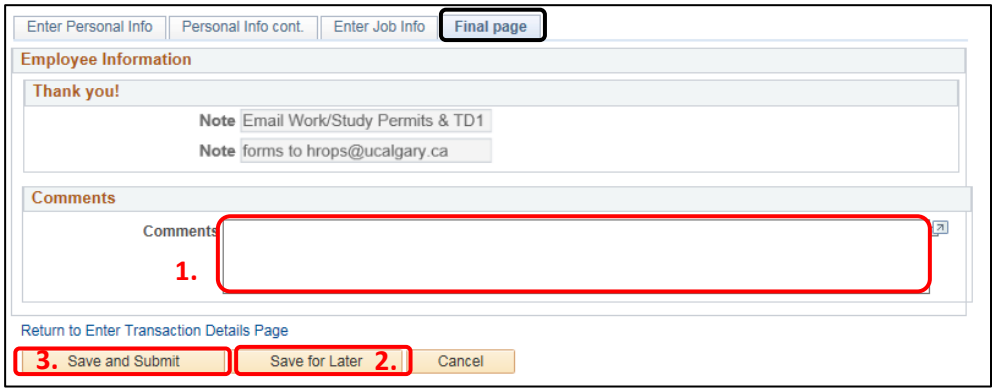
Within this section, you can specify the course(s) the instructor will be teaching if/when required. A maximum of eight different courses can be added, each with their respective compensation rate and half course equivalent. This information displays on the Academic Sessional Contract/Summary.

1. Click the **Subject Area** dropdown and make your selection.
2. Enter the **Catalog Nbr** for the course.
3. Click the **Course Component** dropdown button and make your selection.
4. Enter the **Class Section.**
5. Enter the **Half Course Equivalent**.
6. Enter the **Compensation Rate**.
7. Click the **Final page** tab.



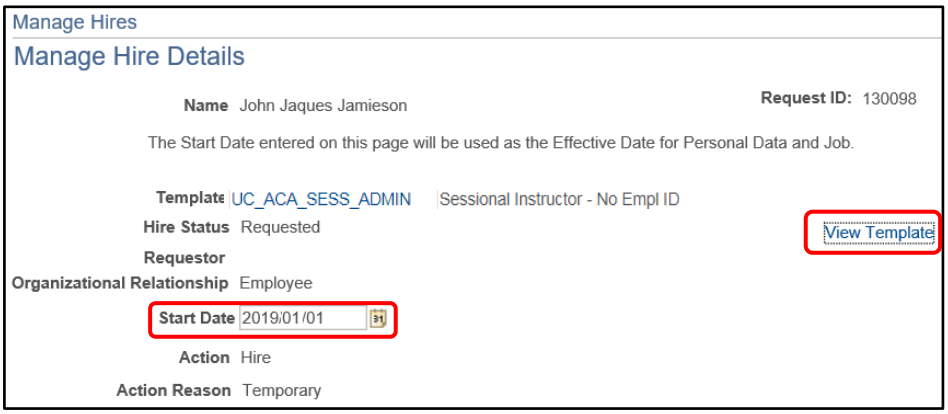
Step 10: Complete the Final Page Tab

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

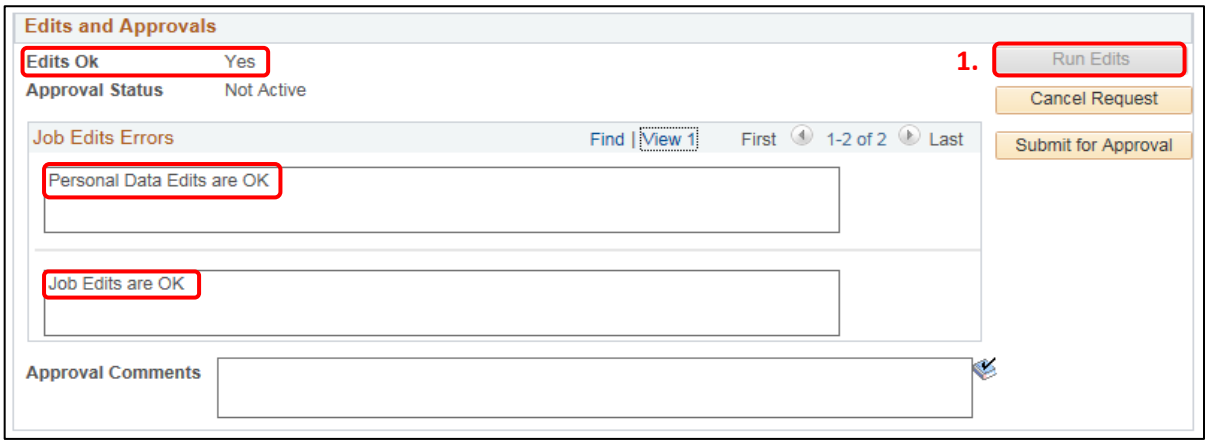
The information entered into the template is now transferred to the Manage Hire Details page. This provides you with an opportunity to review and validate your entries prior to submitting for approval.



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.

1. 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 (1) **Run Edits**.



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

Upon validating your entries, you will see either a pass or fail message (Edits Ok or No). Note: **For Rehires** there will only be *Job Edits* (no Personal Data edits).

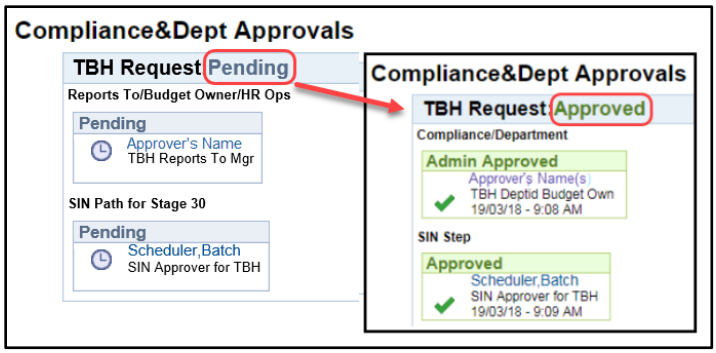
If the Edits pass, the following messages are displayed: • **Edits Ok = Yes** • **Under Job Edits Errors** = Personal Data Edits are OK = Job Edits Errors are OK	**If the Edits fail,** the following messages are displayed: • **Edits Ok = No** • **Job Edits Errors** (1&2) – In these sections you receive a PeopleSoft message explaining the error (e.g. Planned Exit Date cannot be before Entry Date). 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.

2. Once the edits are ok, click Submit for Approval.

Important! Whenever you click ***Submit for Approval*** a brand new candidate will receive an email requesting their SIN and DOB.

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. This includes a brand new candidate who will receive an email with instructions to submit their SIN and DOB. At which point, the status will change to **Approved**.



An approver's name (such as the Department Budget Owner) is displayed in the approval box, followed by any other required reviews and approvals.

- Best practice: **Record the Request ID** number for the next step.

The first part of the process is now complete.

Results

Completion of this transaction results in an email notification to the approver alerting him/her that a Template-Based Hire requires approval.

Next Step – Search Match

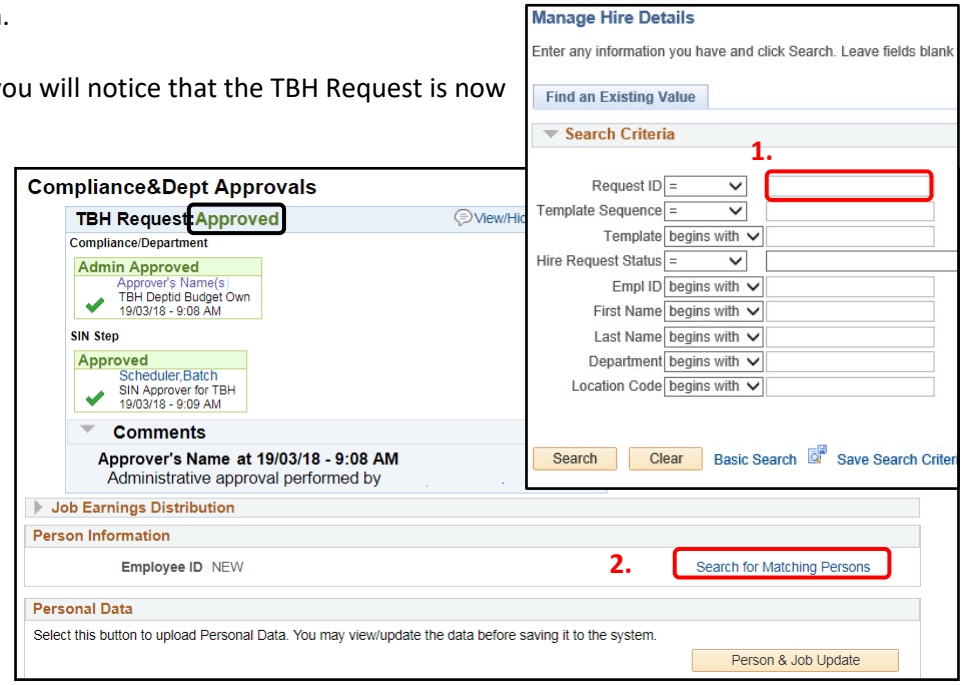
Once the approver has **approved** the TBH transaction, you will receive an email notification alerting you that the Academic Sessional has been approved.

- Sign into the MyUofC portal, under My Work, select **Manager Self Service → Job and Personal Information → Template-Based Hire → Manage Hire Details**.

1. On the **Manage Hire Details** page, enter the **Request ID**.
   - Click the **Search** button.

   On the Manage Hire Details page, you will notice that the TBH Request is now approved.

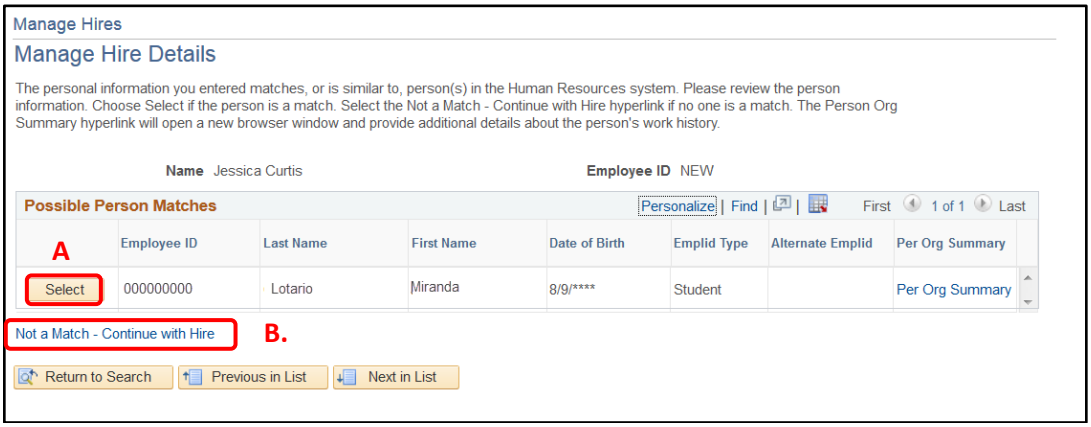
2. Click the **Search for Matching Persons** link. (Note this is only applicable to new hires for a Sessional or Scholarship TBH.)

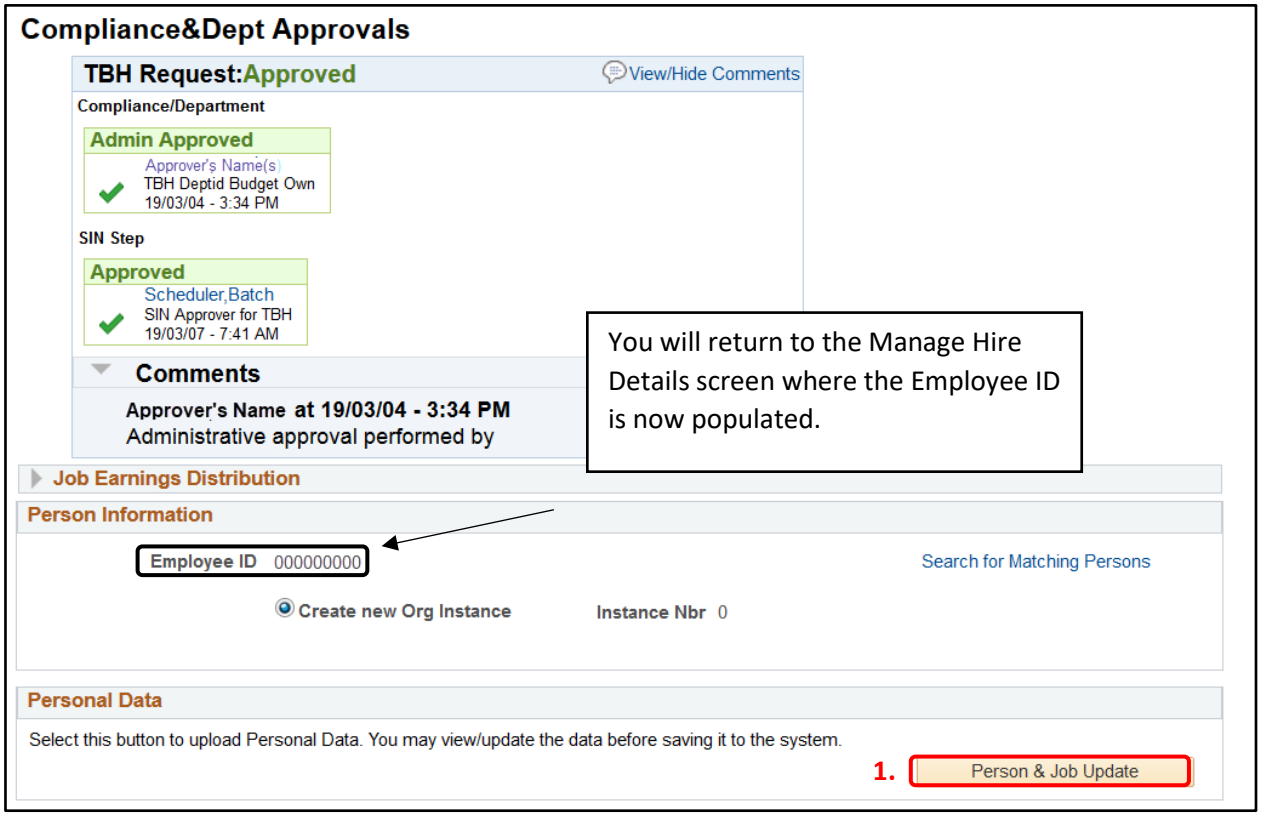


The **Possible Person Matches** appear on the Manger Hire Details screen. **Review the person information** and choose either option A or B.

A. If the information **matches** the person choose **Select**.

B. If the results **do not match** the person, click the **Not a Match - Continue with Hire** link.





Person and Job Update

1. Click the **Person & Job Update** button to create the job record.

2. Navigate to the **Template-Based Hire Status** page, (from Manager Self-Service → Template-Based Hire → Template-Based Hire Status) scroll down to the **Processed Hires** section and check to see the person's employee ID is displayed. This confirms the hire is processed.

   You will now see this hire in your HR Manager reports the following day.

End of Process