

Initiate a Template-Based Hire – Clinical and Adjunct Appointments

Purpose: This reference guide takes you through the process of hiring or rehiring a **Clinical or Adjunct appointment using** job code CL0056 or AC0019 respectively.

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

Please note – the initiator of the TBH transaction is responsible for finalizing the hire once all approvals have been completed, consistent with the TBH process used for sessional appointments.

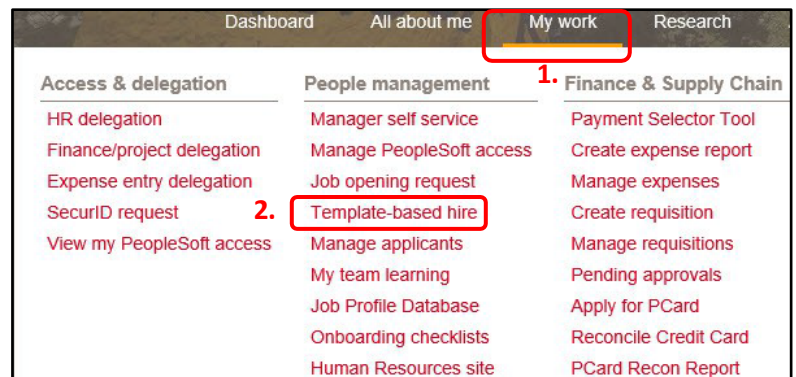
Prerequisites:

- Must be logged in to the myUofC portal.
- Must have the appointee's Empl ID (if existing), job details and accounting information (if applicable).

Step 1: Access Template-Based Hire Screen

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

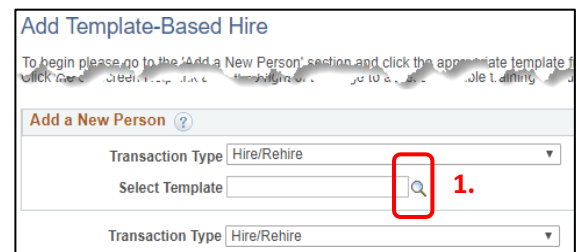
The **Add Template-Based Hire** screen is displayed.



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.



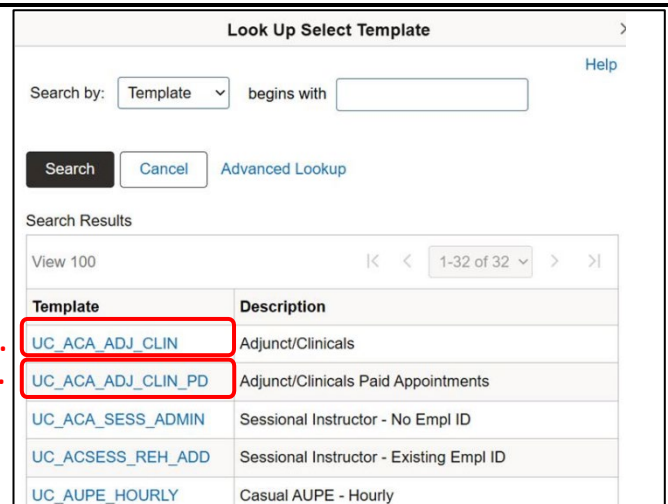
Step 3: Select Template

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.

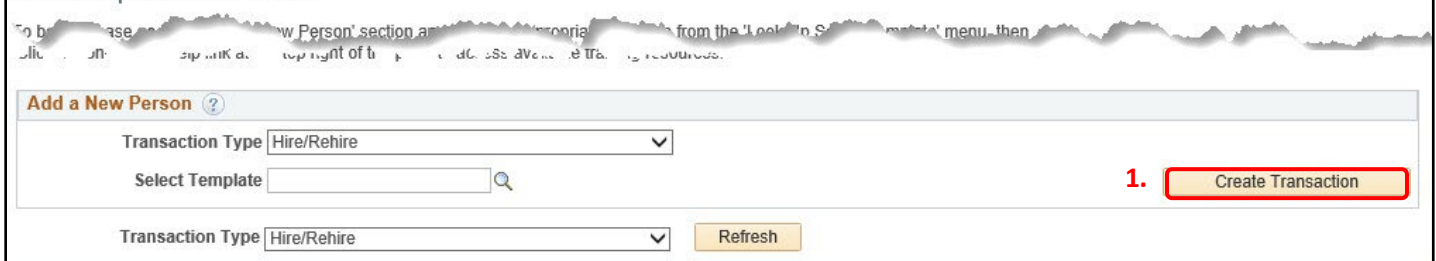
- For an **unpaid** appointment, select the **UC_ACA_ADJ_CLIN** link.
- For a **paid** appointment, select the **UC_ACA_ADJ_CLIN_PD** link.

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



Template	Description
UC_ACA_ADJ_CLIN	Adjunct/Clinicals
UC_ACA_ADJ_CLIN_PD	Adjunct/Clinicals Paid Appointments
UC_ACA_SESS_ADMIN	Sessional Instructor - No Empl ID
UC_ACSESS_REH_ADD	Sessional Instructor - Existing Empl ID
UC_AUPE_HOURLY	Casual AUPE - Hourly

Add Template-Based Hire



Transaction Type: Hire/Rehire

Select Template: [Search Icon]

Transaction Type: Hire/Rehire

Refresh

1. Create Transaction

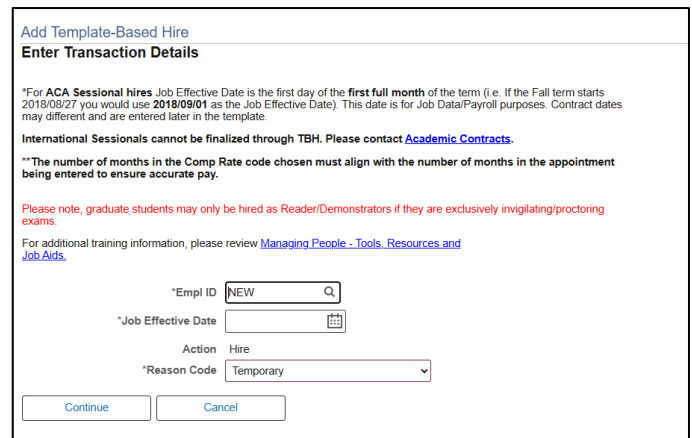
Step 4: Create Transaction

- 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.



Add Template-Based Hire
Enter Transaction Details

*For ACA Sessional hires Job Effective Date is the first day of the first full month of the term (i.e. If the Fall term starts 2018/09/27 you would use 2018/09/01 as the Job Effective Date). This date is for Job Data/Payroll purposes. Contract dates may differ and are entered later in the template.

International Sessionals cannot be finalized through TBH. Please contact [Academic Contracts](#).

**The number of months in the Comp Rate code chosen must align with the number of months in the appointment being entered to ensure accurate pay.

Please note, graduate students may only be hired as Reader/Demonstrators if they are exclusively invigilating/proctoring exams.

For additional training information, please review [Managing People - Tools, Resources and Job Aids](#).

*Empl ID: NEW

*Job Effective Date: [Calendar Icon]

Action: Hire

*Reason Code: Temporary

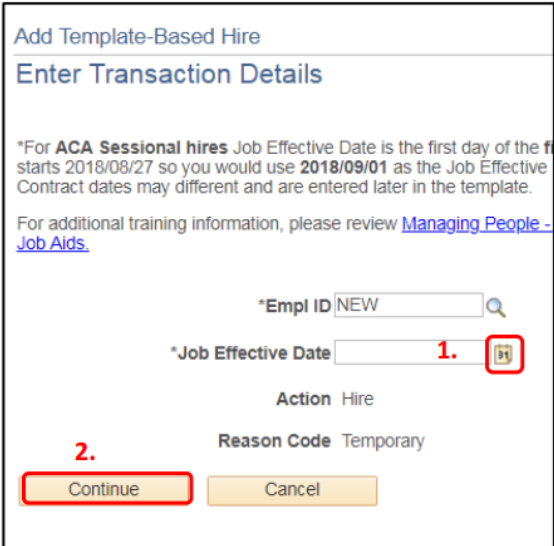
Continue Cancel

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 start date.
2. Click **Continue**.



Add Template-Based Hire
Enter Transaction Details

*For ACA Sessional hires Job Effective Date is the first day of the first contract. For example, if the hire starts 2018/08/27 so you would use 2018/09/01 as the Job Effective Date. Contract dates may differ and are entered later in the template.

For additional training information, please review [Managing People - Job Aids](#).

*Empl ID NEW

*Job Effective Date 1. [Calendar Icon]

Action Hire

Reason Code Temporary

2. [Continue] [Cancel]

To Rehire someone with an Existing Employee/Student ID

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

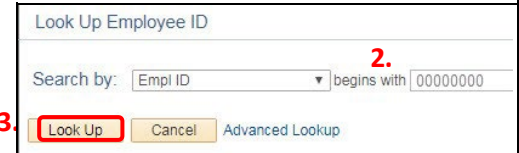
1. Click the **Look up Employee ID button (magnifying glass)** next to the **Employee ID** field



Add Template-Based Hire
Enter Transaction Details

*Employee ID NEW 1. [Magnifying Glass Icon]

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



Look Up Employee ID

Search by: Empl ID begins with 2. 00000000

3. [Look Up] [Cancel] Advanced Lookup

4. A message appears confirming the person already exists. Click **OK**.
5. In the **Search Results** click on the ID in the **Empl ID** column.

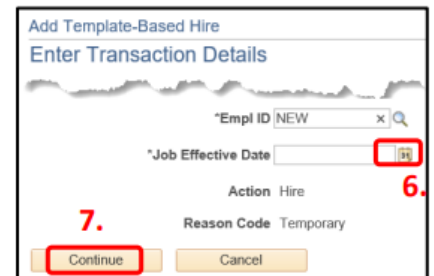


Look Up Employee ID

Search by: Empl ID begins with 00000000

Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
5. 00000000	Train12_May Zie Zie	Train12_May	(blank)	(blank)	(blank)

6. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select the start date.
7. Click **Continue**. Note: the 'Action' status defaults to **Hire**. If this is a **Rehire**, the field will automatically adjust once the template is saved.



Add Template-Based Hire
Enter Transaction Details

*Empl ID NEW

*Job Effective Date 6. [Calendar Icon]

Action Hire

Reason Code Temporary

7. [Continue] [Cancel]

Step 6: Complete *Personal Info* Tab

1. On the **Enter Personal Info** tab, complete the following fields:
 - a. Prefix
 - b. First Name
 - c. Last name
 - d. Email address
2. Click the **Personal Info cont.** tab to continue.

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.

Add Template-Based Hire

Enter Transaction Information

Enter the employee or general associate information using the tabs below. You must complete each tab before you can Save and Submit. If you cannot enter all of the person's information select Save for Later.

Enter Personal Info | Personal Info cont. | Enter Job Info | Final Page

Employee Information

Primary Name - English

Name Prefix

*First Name

Middle Name

*Last Name

Name Suffix

Contact Email Address

*Email Address

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

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

Click the **Enter Job Info** tab to continue.

Add Template-Based Hire

Enter Transaction Information

Enter the employee or general associate information using the tabs below. You must complete each tab before you can Save and Submit. If you cannot enter all of the person's information select Save for Later.

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

Employee Information

Mailing Address

*Address Type

*Address Line 1

Address Line 2

Address Line 3

Address Line 4

*City

*Province

*Postal Code

Phone Number

*Phone Type

Telephone

Phone Extension

[Return to Enter Transaction Details Page](#)

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 the individual will be working.
2. 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.
3. Click the **Job Code** dropdown and select **AC0019 for Adjunct**, or **CL0056 for Clinical** appointees.
4. If a **position number** has been created for the role, enter the number. A position number is only required when a reporting relationship will exist with this appointee.
5. 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.

[Add Template-Based Hire](#)

Enter Transaction Information

Enter the employee or general associate information using the tabs below. You must complete each tab before you can Save and Submit. If you cannot enter all of the person's information select Save for Later.

Enter Personal Info Personal Info cont. **Enter Job Info** Final Page

Employee Information

TBH Start Date

Job Effective Date

Work Location - Expected Job End Date

☒ End Job Automatically *Expected Job End Date

Work Location - Job Fields

*Business Unit *Department

UC Job Information - Job Code

*Job Code

Work Location - Position Data

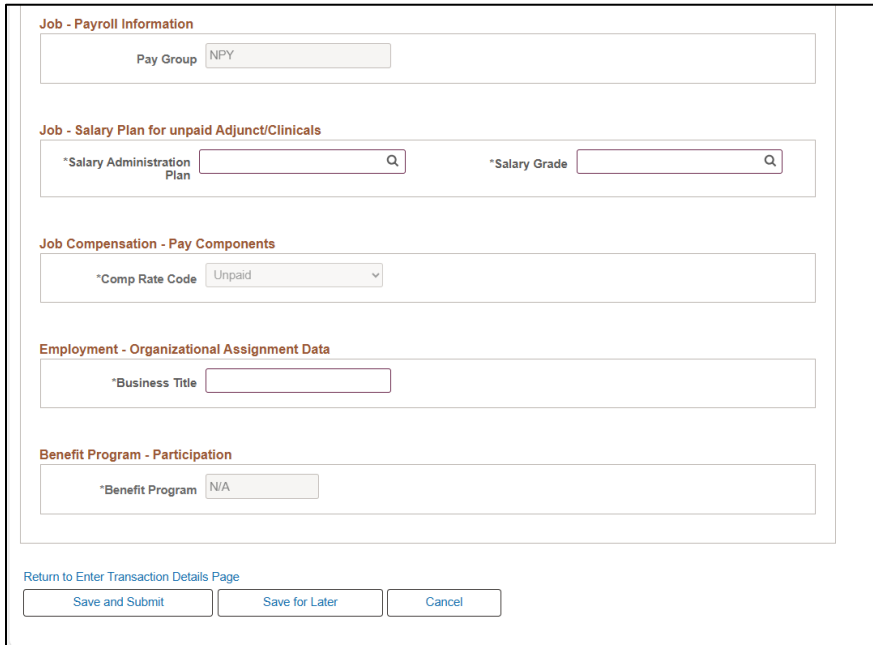
Position Number

Job Information - Reporting Information

*Reports To Position Number

For **Unpaid** Appointments:

- Enter the **Business Title** of the appointee (e.g., Clinical Instructor, Adjunct Professor).
- Click the **Final Page** tab at the top of the screen to continue.



Job - Payroll Information

Pay Group

Job - Salary Plan for unpaid Adjunct/Clinicals

*Salary Administration Plan *Salary Grade

Job Compensation - Pay Components

*Comp Rate Code

Employment - Organizational Assignment Data

*Business Title

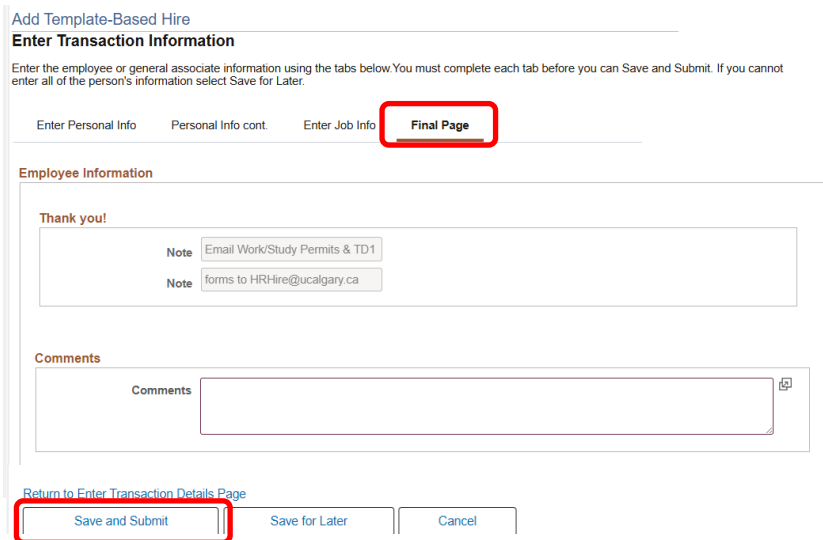
Benefit Program - Participation

*Benefit Program

[Return to Enter Transaction Details Page](#)

Step 10: Complete the Final Page Tab

- (Optional) Use the **Comments** field to provide additional information to approvers in the automated approval workflow.
- (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.
- Click **Save and Submit**.



[Add Template-Based Hire](#)

Enter Transaction Information

Enter the employee or general associate information using the tabs below. You must complete each tab before you can Save and Submit. If you cannot enter all of the person's information select Save for Later.

Enter Personal Info Personal Info cont. Enter Job Info **Final Page**

Employee Information

Thank you!

Note

Note

Comments

Comments

[Return to Enter Transaction Details Page](#)

For **Paid** Appointments:

1. Enter the **Compensation Rate** (annual rate) for the appointment.
2. If the accounting string for the appointment is different from the default accounting for the hiring Department, select **"Yes"** from the **Earnings Distribution** dropdown.
 - Enter the **Combination Code** to specify the accounting string where the compensation will be charged.
3. Click the **Final Page** tab at the top of the screen to continue.

Job - Payroll Information

Pay Group

Job - Salary Plan

*Salary Administration Plan

*Salary Grade

Job Compensation - Pay Components

*Comp Rate Code

*Compensation Rate

Benefit Program - Participation

*Benefit Program

UC Job - Earnings Distribution

*Earnings Distribution Type

Business Unit

*Yes or No

Percent of Distribution

Combination Code

Description

UC Job - Earnings Distribution (2)

Business Unit

*Yes or No

Percent of Distribution

Combination Code

Description

[Return to Enter Transaction Details Page](#)

ChartField Detail

Combination Code

Search Options

☒ Combination Codes

ChartField Detail

Fund Code	Department	Account	Program Code	Internal	Business Unit PC	Project/Grant	Activity ID

Step 10: Complete the Final Page Tab

1. Enter the **Business Title** of the appointee (e.g., Clinical Instructor, Adjunct Professor).
2. **(Optional)** Use the **Comments** field to provide additional information to approvers in the automated approval workflow.
 - If **salary recovery** is required for paid appointments, include these details in the Comments box.
3. **(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.
4. Click **Save and Submit**.

Add Template-Based Hire

Enter Transaction Information

Enter the employee or general associate information using the tabs below. You must complete each tab before you can Save and Submit. If you cannot enter all of the person's information select Save for Later.

Enter Personal Info Personal Info cont. Enter Job Info **Final Page**

Employee Information

Employment - Organizational Assignment Data

*Business Title

Thank you!

Note Email Work/Study Permits & TD1

Note forms to HRHire@ucalgary.ca

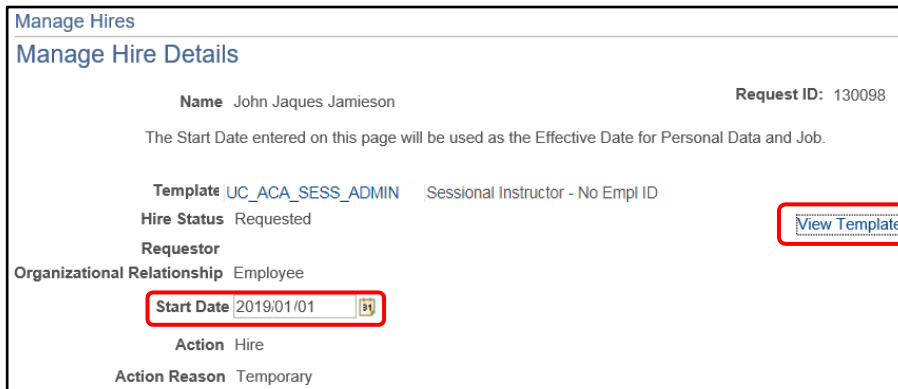
Comments

Comments

Save and Submit Save for Later Cancel

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.



Manage Hires
Manage Hire Details

Name John Jaques Jamieson Request ID: 130098

The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.

Template UC_ACA_SESS_ADMIN Sessional Instructor - No Empl ID

Hire Status Requested **View Template**

Requestor

Organizational Relationship Employee

Start Date 2019/01/01

Action Hire

Action Reason Temporary

Always double-check the **Start Date**.
Should you need to adjust any information, you can click the Cancel Request button.

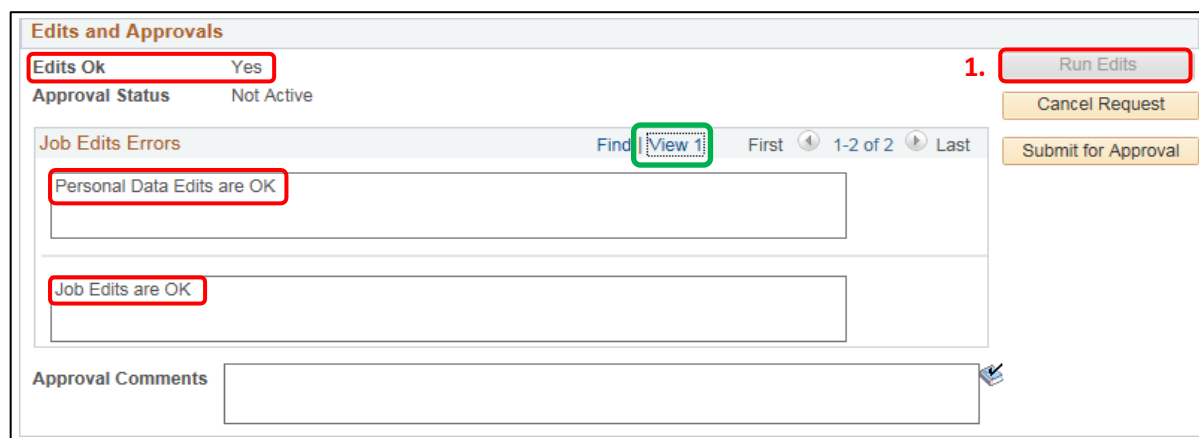
This returns the template to the **Draft Hires to Process** list on the **Add Template-Based Hire page**.

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.



Edits and Approvals

Edits Ok Yes **1. Run Edits**

Approval Status Not Active Cancel Request

Job Edits Errors Find **View 1** First 1-2 of 2 Last Submit for Approval

Personal Data Edits are OK

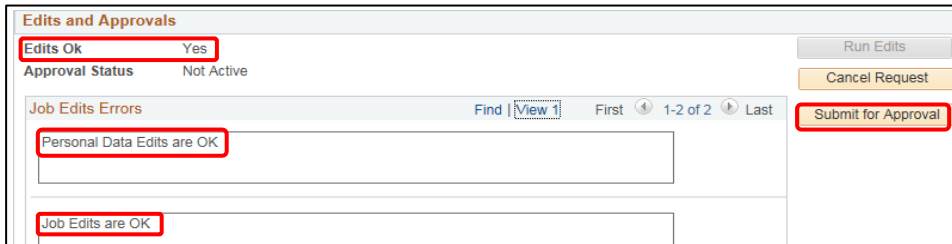
Job Edits are OK

Approval Comments

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



Important! When you click **Submit for Approval**, a new candidate will receive an email requesting their SIN, gender, DOB. *SIN is requested for PAID appointments only.*

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 the new candidate who will receive an email with instructions to submit their SIN and DOB (*paid appointments only*). At which point, the status will change to **Approved**.

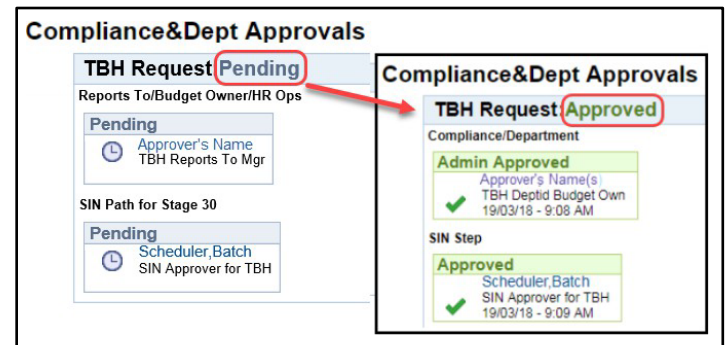
An approver's name (such as the Department Budget Owner) is displayed in the approval box, followed by any other required reviews and approvals.

- **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 next approver alerting them that a Template-Based Hire requires their approval.



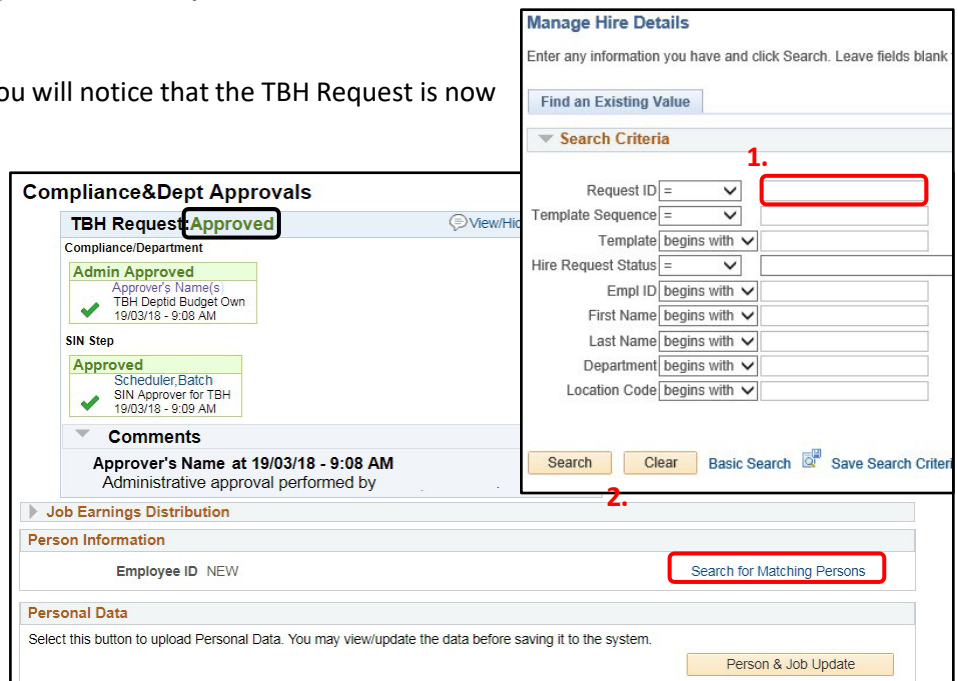
Next Step – Search Match

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



Manage Hire Details

Enter any information you have and click Search. Leave fields blank

Find an Existing Value

Search Criteria

Request ID = 1.

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

Compliance&Dept Approvals

TBH Request Approved View/Hide

Compliance/Department

Admin Approved

Approver's Name(s)
TBH Dept'd Budget Own
19/03/18 - 9:08 AM

SIN Step Approved

Scheduler, Batch
SIN Approver for TBH
19/03/18 - 9:09 AM

Comments

Approver's Name at 19/03/18 - 9:08 AM
Administrative approval performed by

Job Earnings Distribution

Person Information

Employee ID NEW

Search for Matching Persons

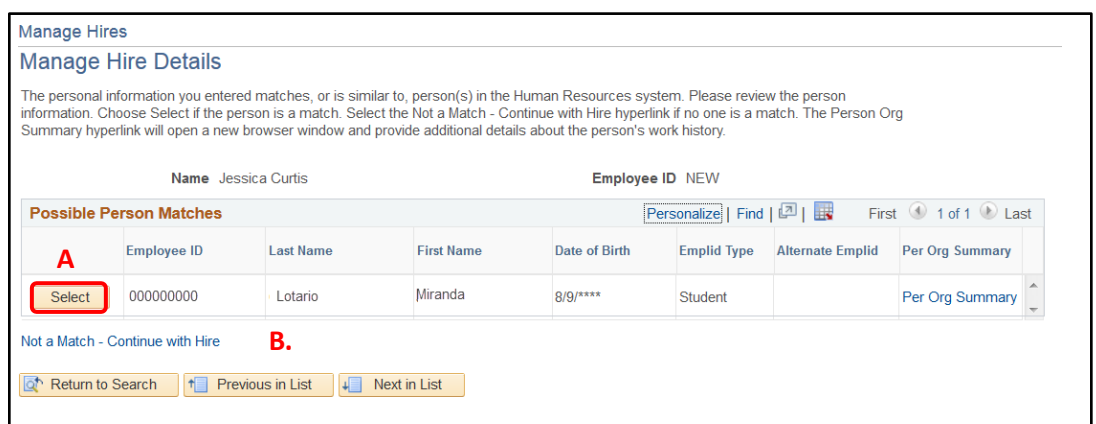
Personal Data

Select this button to upload Personal Data. You may view/update the data before saving it to the system.

Person & Job Update

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.



Manage Hires

Manage Hire Details

The personal information you entered matches, or is similar to, person(s) in the Human Resources system. Please review the person information. Choose Select if the person is a match. Select the Not a Match - Continue with Hire hyperlink if no one is a match. The Person Org Summary hyperlink will open a new browser window and provide additional details about the person's work history.

Name Jessica Curtis Employee ID NEW

Possible Person Matches Personalize Find 1 of 1 Last

	Employee ID	Last Name	First Name	Date of Birth	Emplid Type	Alternate Emplid	Per Org Summary
A	000000000	Lotario	Miranda	8/9/****	Student		Per Org Summary

Select

B. Not a Match - Continue with Hire

Return to Search Previous in List Next in List

Compliance&Dept Approvals

TBH Request: Approved [View/Hide Comments](#)

Compliance/Department

Admin Approved

✓ Approver's Name(s)
TBH Deptid Budget Own
19/03/04 - 3:34 PM

SIN Step

Approved

✓ Scheduler, Batch
SIN Approver for TBH
19/03/07 - 7:41 AM

Comments

Approver's Name at 19/03/04 - 3:34 PM
Administrative approval performed by

Job Earnings Distribution

Person Information

Employee ID 000000000 [Search for Matching Persons](#)

☐ Create new Org Instance Instance Nbr 0

Personal Data

Select this button to upload Personal Data. You may view/update the data before saving it to the system.

1. **Person & Job Update**

You will return to the Manage Hire Details screen where the Employee ID is now populated.

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