Initiate a Template-Based Hire Clinical/Adjunct

Reference Guide

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.

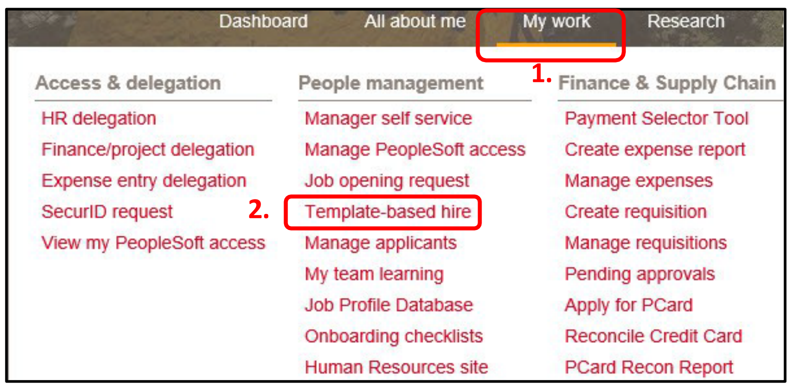
Prerequisites:

- 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**.

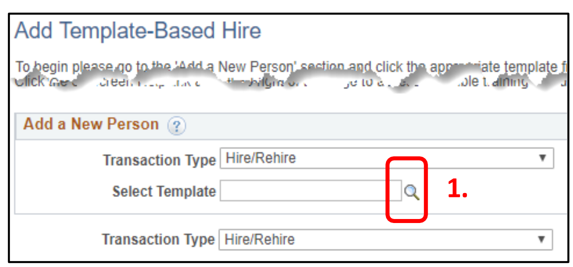
The **Add Template-Based Hire** screen is displayed.



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.



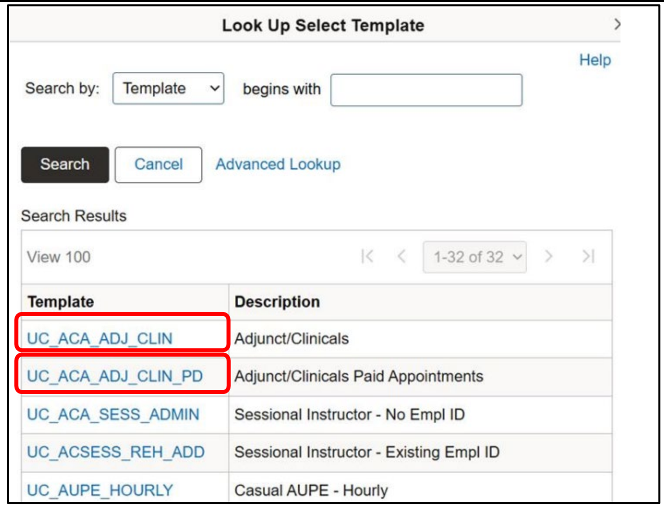
Step 3: Select Template

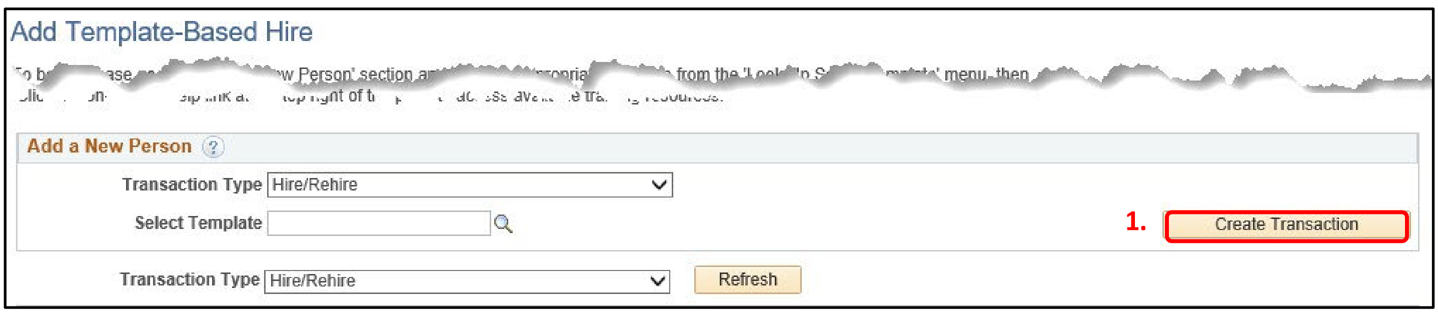
The templates displayed are specific to the types of hires Reports to Managers/HR Forms Initiators perform. You may have more or fewer templates visible depending on your HR security roles.

Select either A or B as appropriate.

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

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





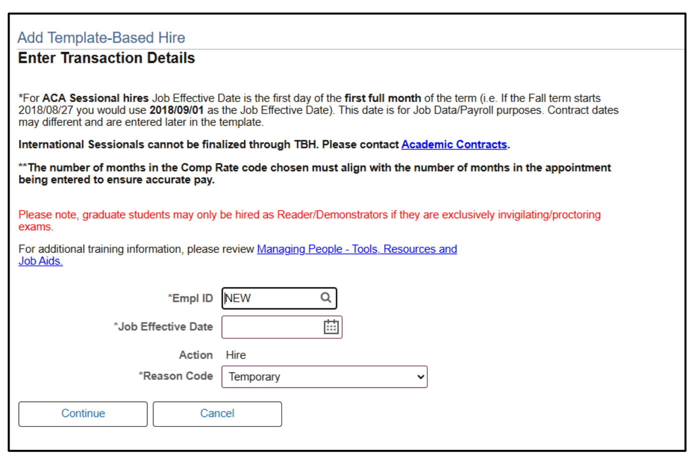
Step 4: Create Transaction

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 start date.

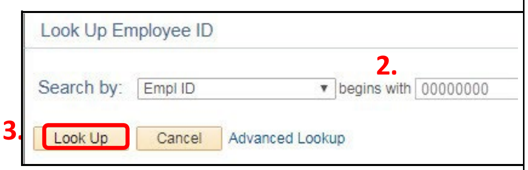
2. Click **Continue**.

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

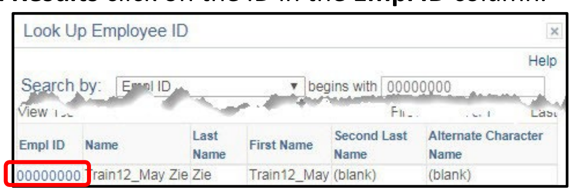
2. Enter the **employee ID**.
3. Click **Look Up**.



4. A message appears confirming the person already exists. Click **OK**.

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

5.



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.

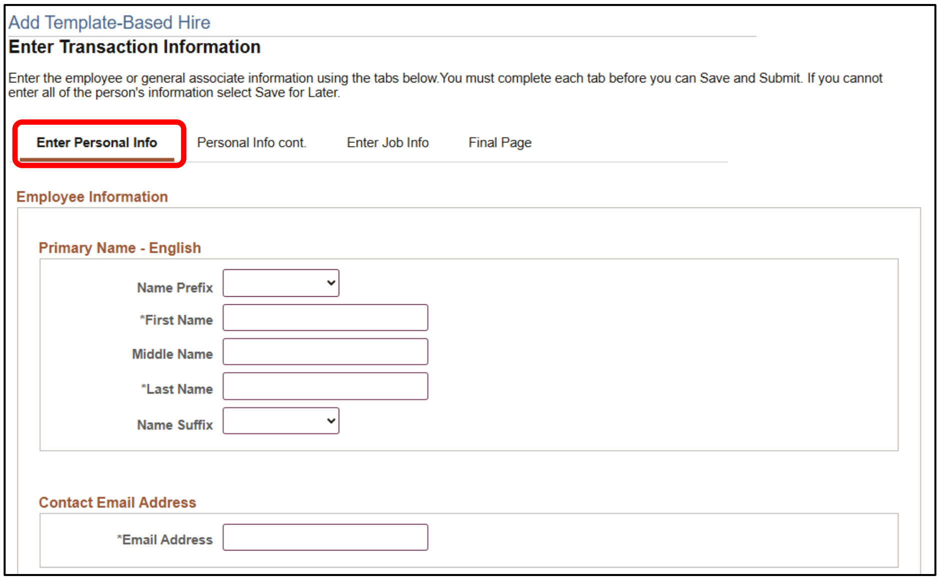
Step 6: Complete *Personal Info* Tab

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.



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

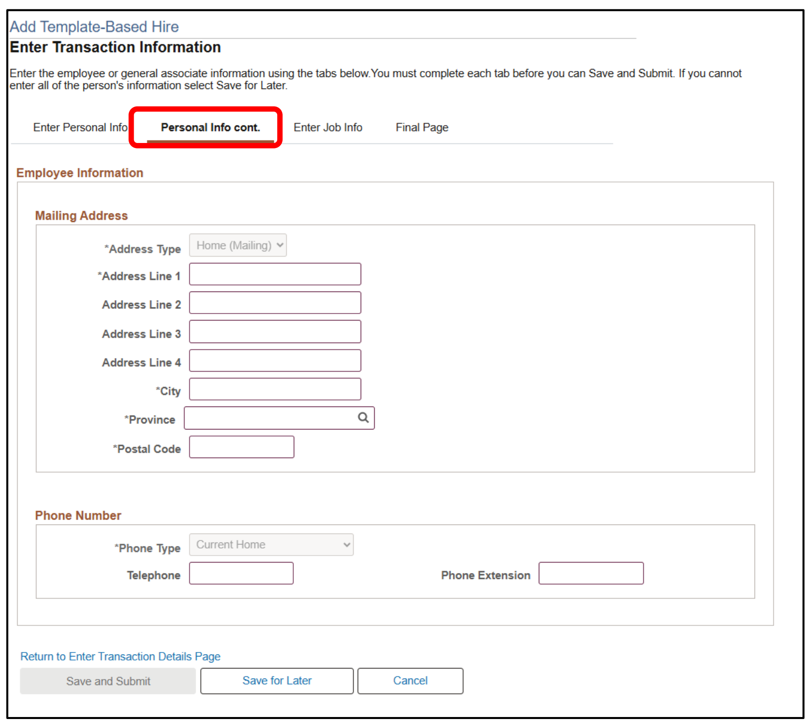
Step 7: Complete the Personal Info cont. Tab

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.



Step 8: Complete the Enter Job Info Tab

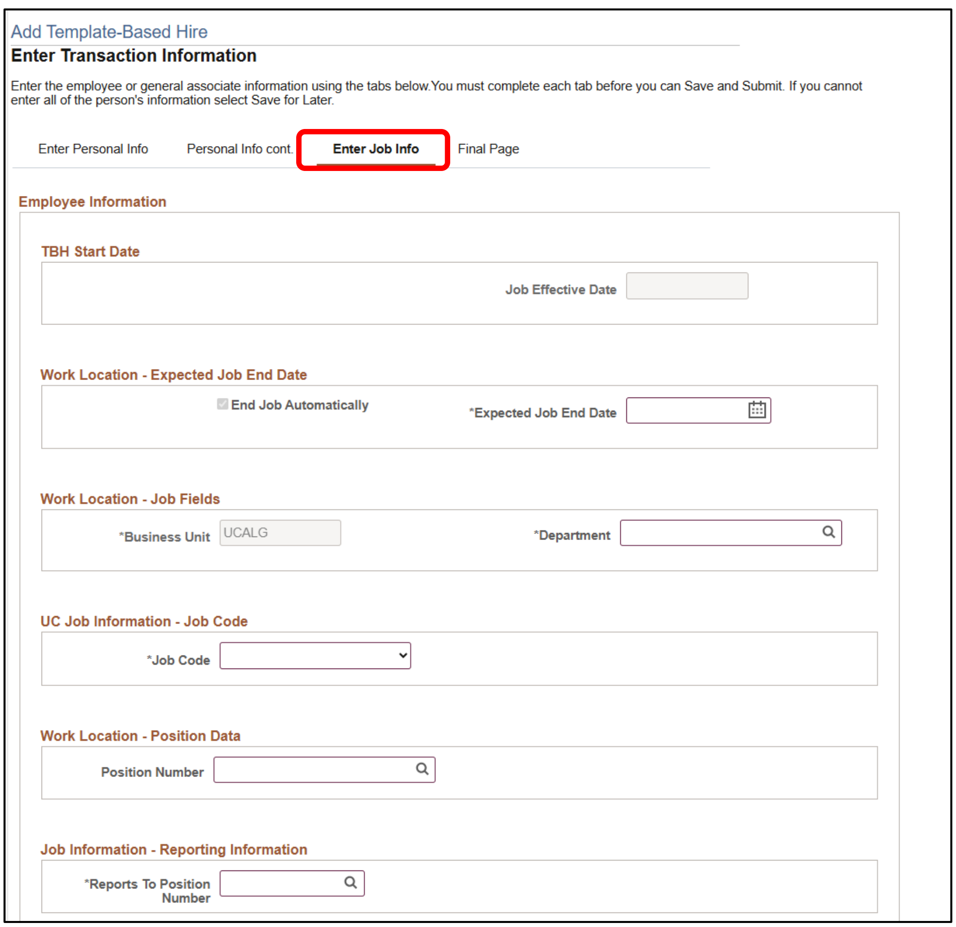
1. The End Job Automatically checkbox is pre-selected, so you must enter the **Expected Job End Date**. This should be the last day the individual will be working.

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.

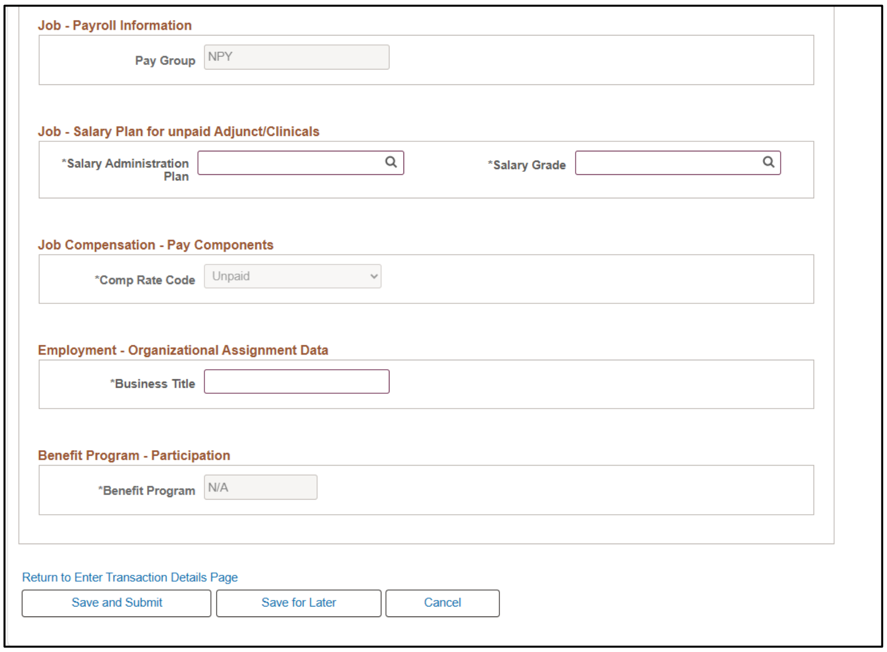
4. If a **position number** has been created for the role, enter the number. A position number is only required when a reporting relationship will exist with this appointee.

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.



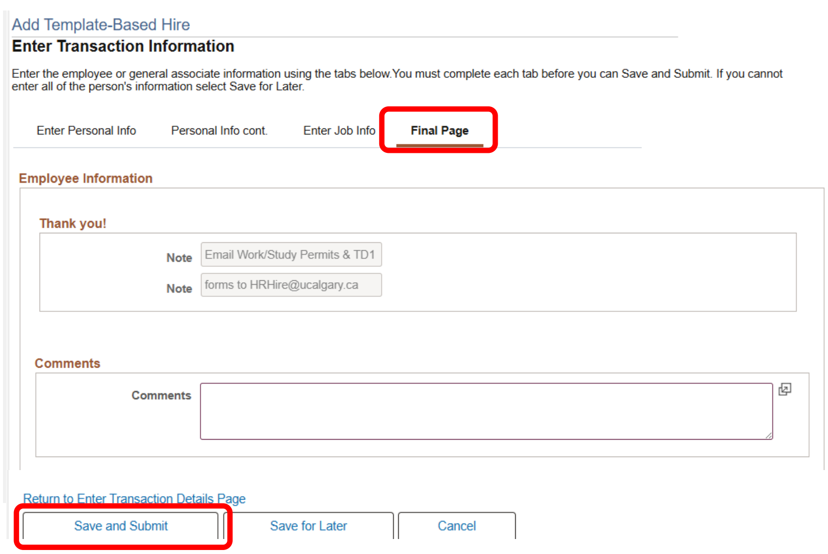
For Unpaid Appointments:

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



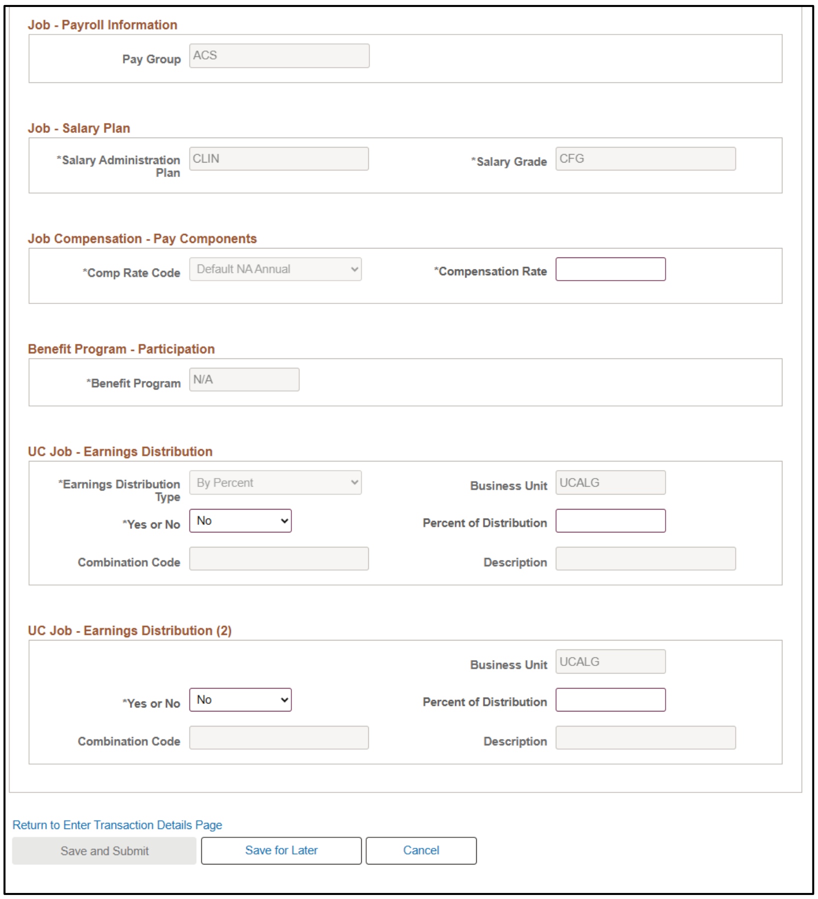
Step 10: Complete the Final Page Tab

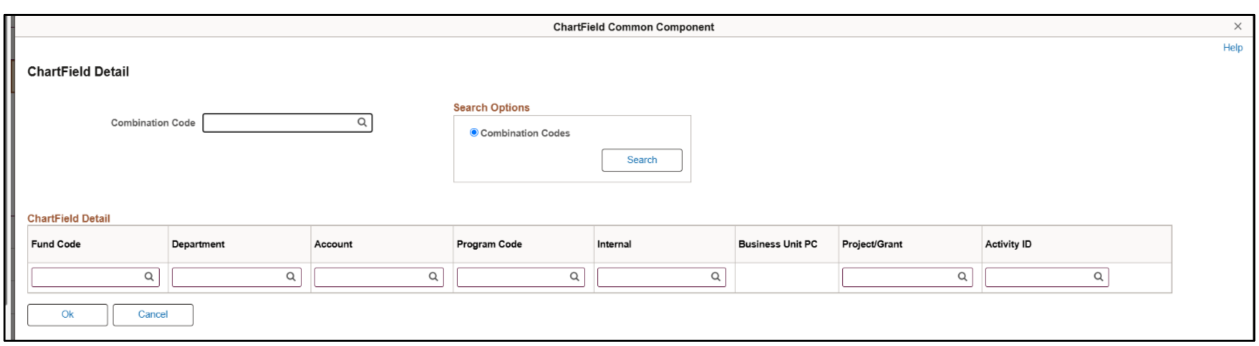
1. **(Optional)** Use the **Comments** field to provide additional information to approvers in the automated approval workflow.
2. **(Optional)** Use the **Save for Later** button to save up to this point and return later via the Drafts Hires to Process section on the Template-Based Hire page.
3. Click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



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.





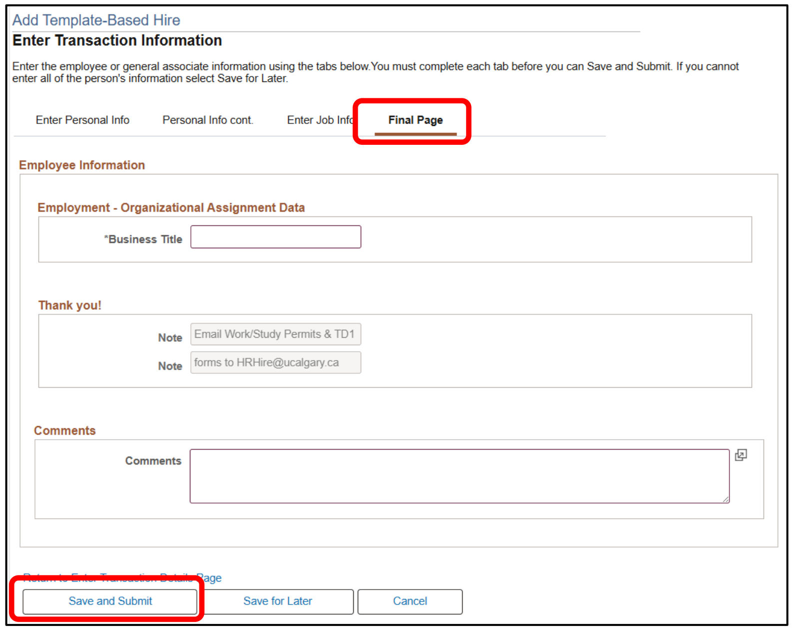
Step 10: Complete the Final Page Tab

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.

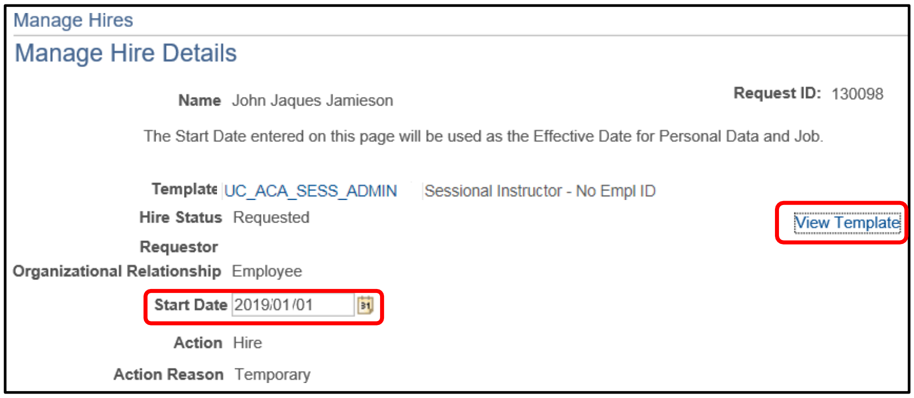
3. **(Optional)** Use the **Save for Later** button to save up to this point and return later via the Drafts Hires to Process section on the Template-Based Hire page.

4. Click **Save and Submit**.



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.

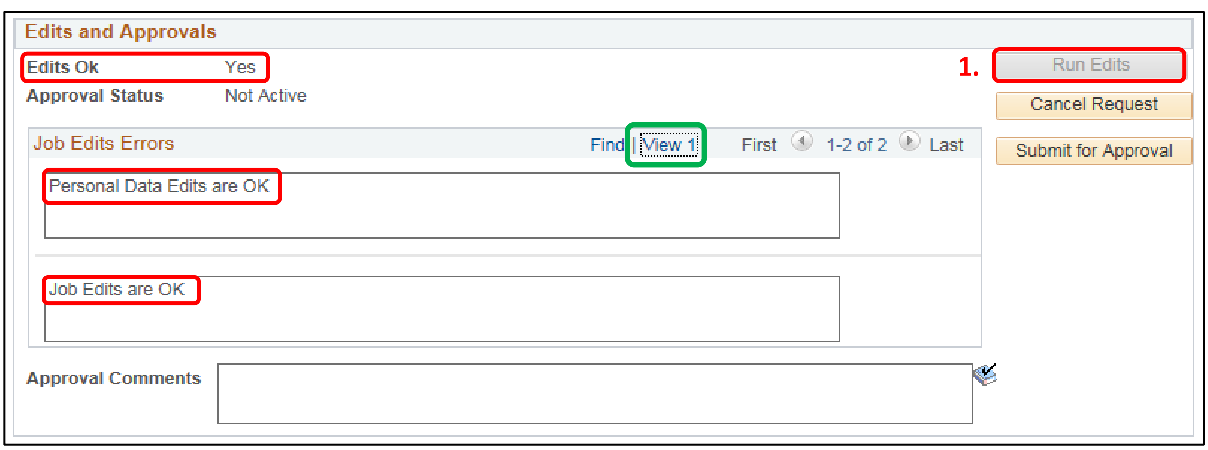


Always double-check the **Start Date**. **Should you need to adjust any information, you can click the Cancel Request** button. This returns the template to the **Draft Hires to Process** list on the **Add Template-Based Hire page**. From here, the template can be edited and resubmitted.

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.



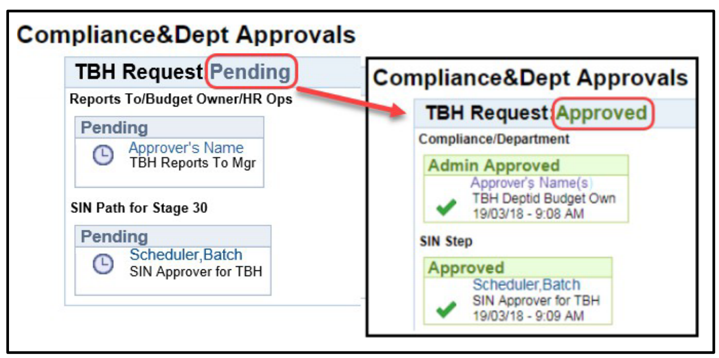
Upon validating your entries, you will see either a pass or fail message (Edits Ok or No). Note: **For Rehires** there will only be *Job Edits* (no Personal Data edits).

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! 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

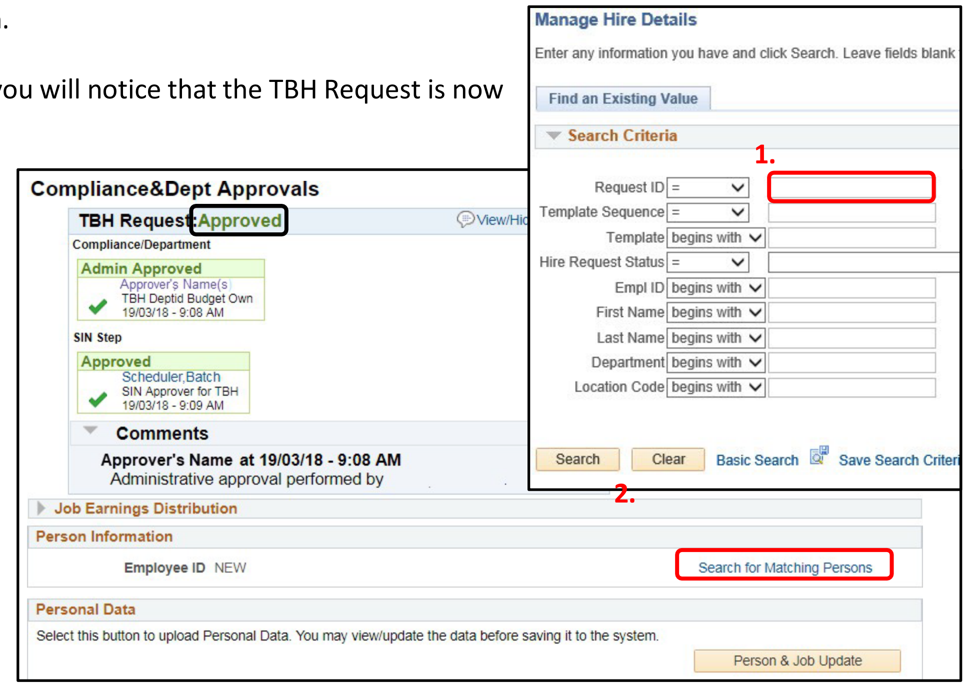
Once the approver has **approved** the TBH transaction, the Requestor will receive an email notification alerting you that the transaction has been approved.

- 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.

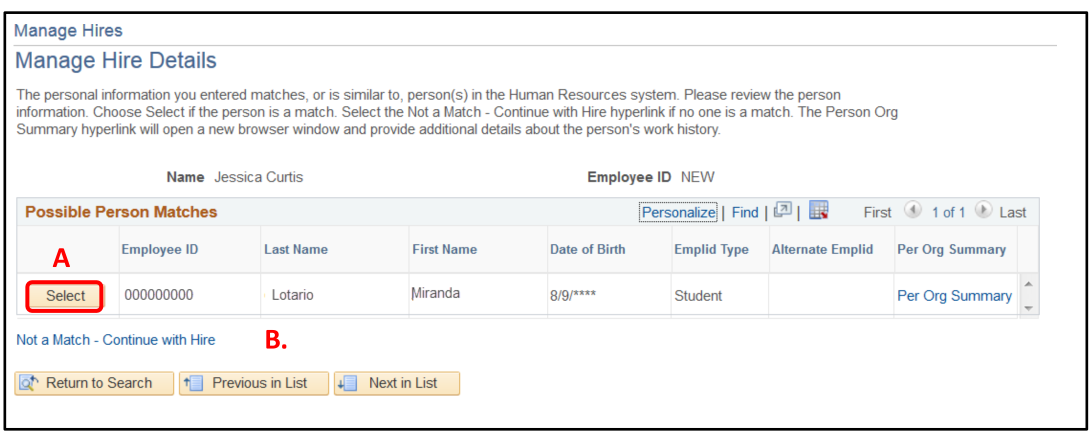
2. Click the **Search for Matching Persons** link.

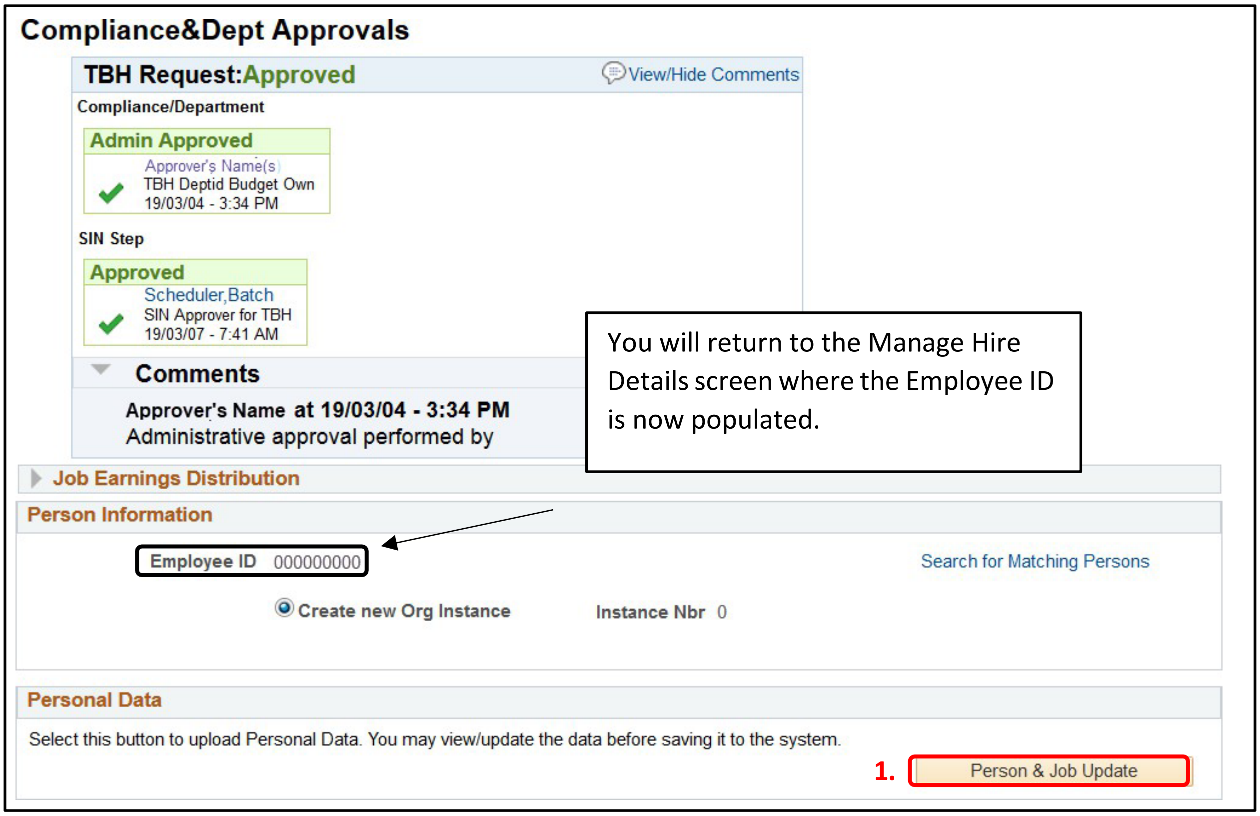


The **Possible Person Matches** appear on the Manger Hire Details screen. **Review the person information** and choose either option A or B.

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