UNIVERSITY OF CALGARY

Initiate a Template-Based Hire for a General Associate Relationship

Purpose:

This reference guide takes you through the process of hiring/rehiring a General Associate relationship using the Template-Based Hire (TBH) in PeopleSoft. Please visit the HR website General Associate and Associate – Limited Access page for information and processes of other General Associate relationship types.

For hiring a consultant/contractor, please contact HR Services to help determine whether a service provider should be hired and paid as an employee or as an independent contractor.

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 the individual's personal information, including date of birth (to prevent issuing multiple UCIDs for the same person), and job details on hand.
- If hiring for a consultant/contractor relationship type, ensure you have the supplier ID provided by Supply Chain Management (SCM). If the consultant/contractor was sourced from the approved master list of Preferred Suppliers, then include the supplier ID in the TBH template.
- If you are **setting up a brand new consultant/contractor not on the approved master list**, (1) contact HR Services to help determine whether a service provider should be hired and paid as an employee or as an independent contractor. If it is determined your service provider should be an independent contractor, proceed to contact Procurement Services to (2) complete a **Competitive Bid** process or a **Sole Source Request** form depending on the amount. Once the competitive bid process is complete, or a Sole Source request is approved (3) the consultant/contractor will need approval as a new supplier and will therefore need to fill out the New Supplier Request Form (scroll down to Suppliers) before any services are performed, in order to obtain a Supplier ID. Refer to How to set up a Contractor as a Supplier quick reference guide or contact Supply Chain Management or HR Services for assistance.

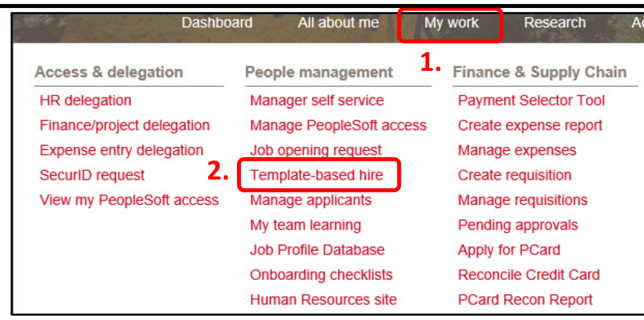
Initiate a Template-Based Hire General Associate

Reference Guide

Step 1: Access Template-Based Hire Screen

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

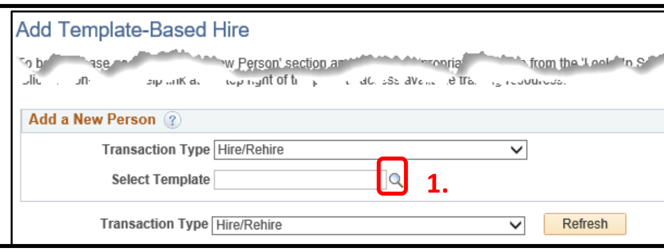
The **Add Template-Based Hire** screen is displayed.



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.



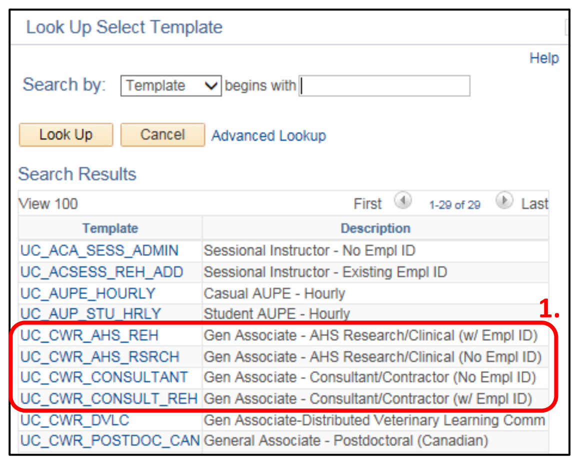
Step 3: Select Template

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.

1. Select the appropriate General Associate type:
   - **Consultant/Contractor** or
   - **AHS Research/Clinical Administrator**.

   Note: **There are two choices for each type**:
   - Select "**No Empl ID**" if no employee ID exists; or,
   - Select "**w/Empl ID**" if an employee ID already exists

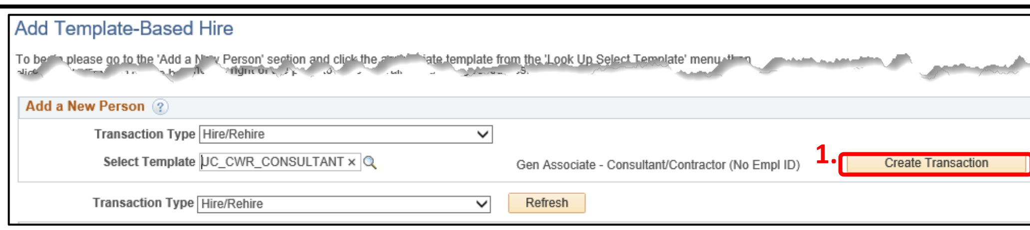
You are returned to the **Add Template-Based Hire** screen.



Step 4: Create Transaction

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

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



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

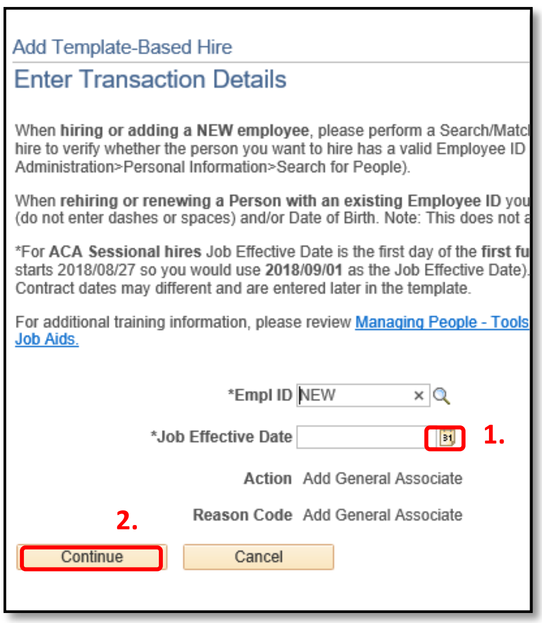
Step 5: Enter Transaction Details

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 or the 16th of the month to coincide with a new pay period.

2. Click **Continue**.



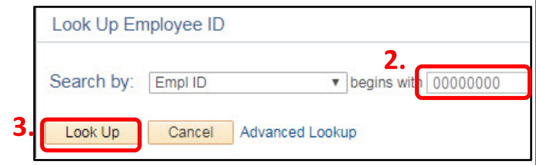
Proceed to Step 6.

To Rehire someone with an Existing Employee/Student ID

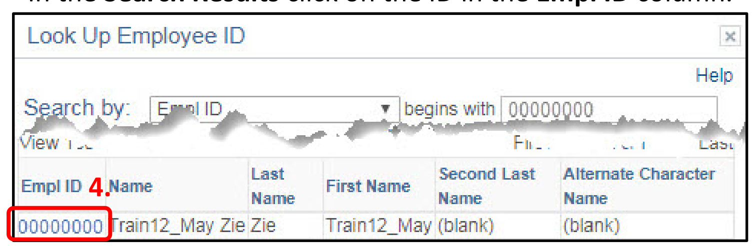
You will require the **existing student or employee ID**.

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

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

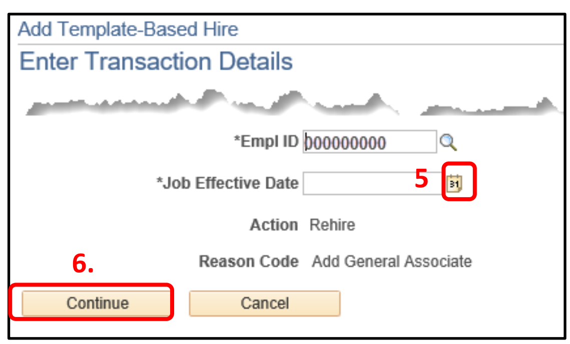


4. In the **Search Results** click on the ID in the **Empl ID** column.



5. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select the 1st or the 16th of the month.

6. Click **Continue**



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. Date of Birth**
   - **d. Gender**
   - **e. Address – Line 1**
   - **f. Telephone**
   - **g. Email Address**

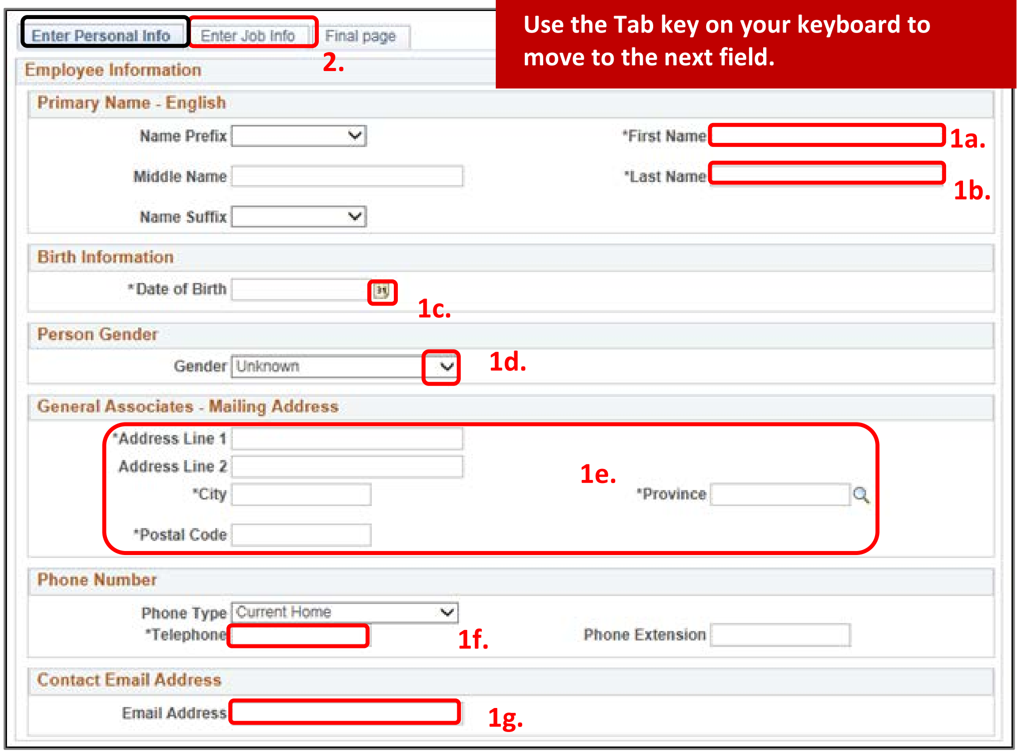
     (Gender and Email are optional, but encouraged)
2. Click the **Enter Job Info** tab.

Note: If you are performing a **Rehire** these fields will not appear as the information is already on file.

Here 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.



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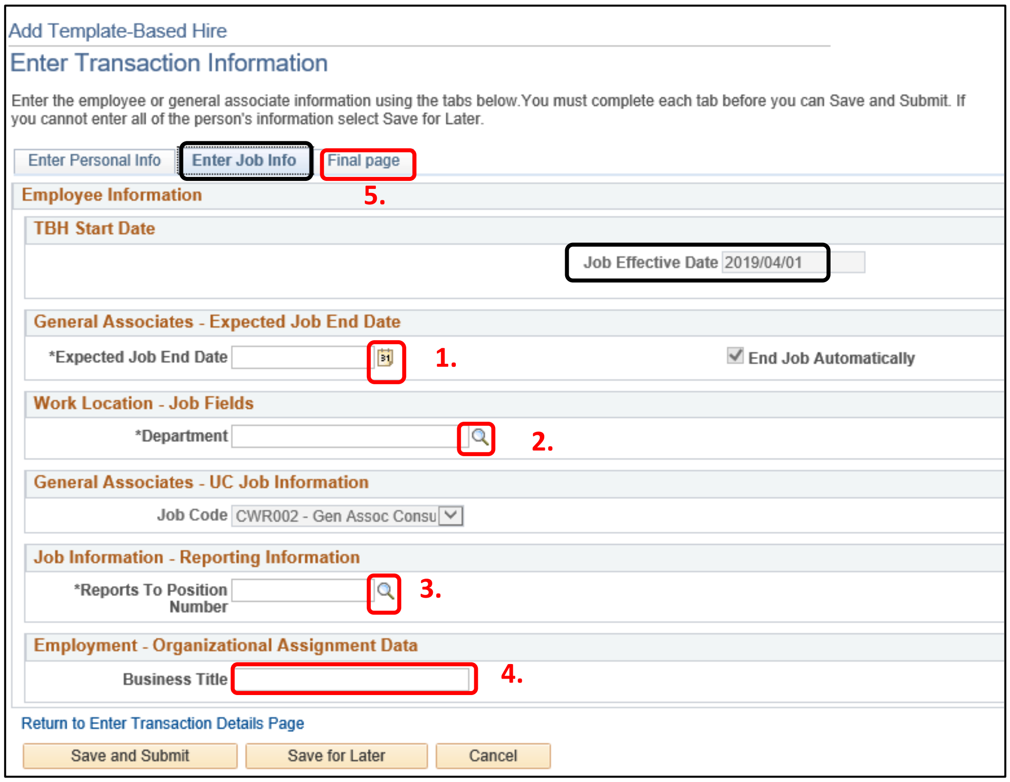
Step 7: Complete the Enter Job Info Tab

- Ensure the Effective Date is accurate.

1. Enter the Expected **Job End Date**. Because the End Job Automatically box is pre-selected, you must enter an end date (max 2 years). It is a good idea to make note of the end date as this is when the job will terminate in PeopleSoft.
2. Enter the correct department information into the **Department** field. This is the department number under which the individual will be working.
3. 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.
4. Enter an appropriate **Business Title**.
5. Click the **Final Page** tab.



Step 8: Complete the Final Page Tab

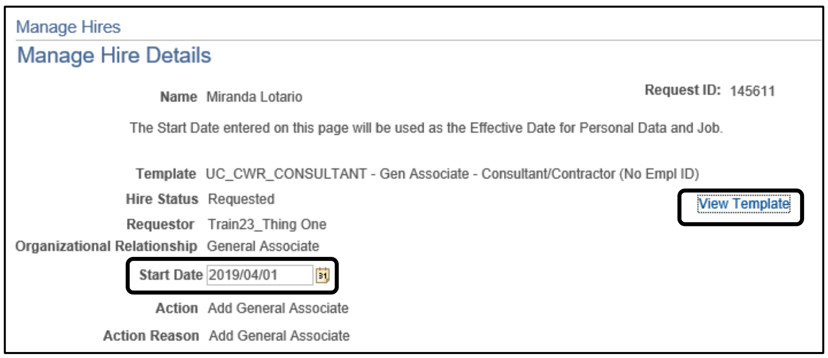
1. Use the **Comments** field to provide additional information to approvers in the automated approval workflow. **Note**: If you are hiring a **Consultant/Contractor**, in the Comments field enter the **Supplier ID provided by Supply Chain Management**. If you are hiring an **AHS Research/Clinical Administrator**, no comments are required.

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**. **Note**: Each tab must be complete before you can Save and Submit.

Step 10: 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.

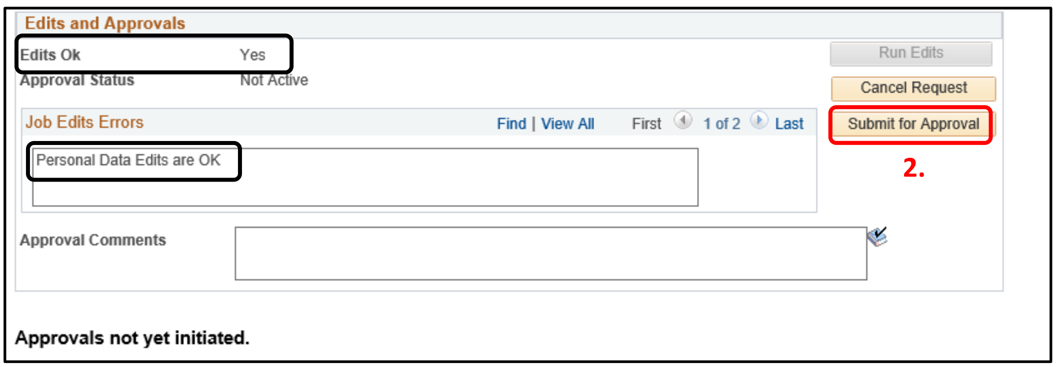
1. The **Run Edits** button provides a final verification of your data entries. This button runs a process to ensure that the date you entered is valid for the appointment type being hired. To perform this process, begin by clicking **Run Edits**.

   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. Note: **For Rehires** there will only be *Job Edits* (no Personal Data edits).

If the Edits pass, the following messages are displayed:	**If the Edits fail,** the following messages are displayed:
• **Edits Ok = Yes** • **Under Job Edits Errors** = Personal Data Edits are OK = Job Edits Errors are OK	• **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.

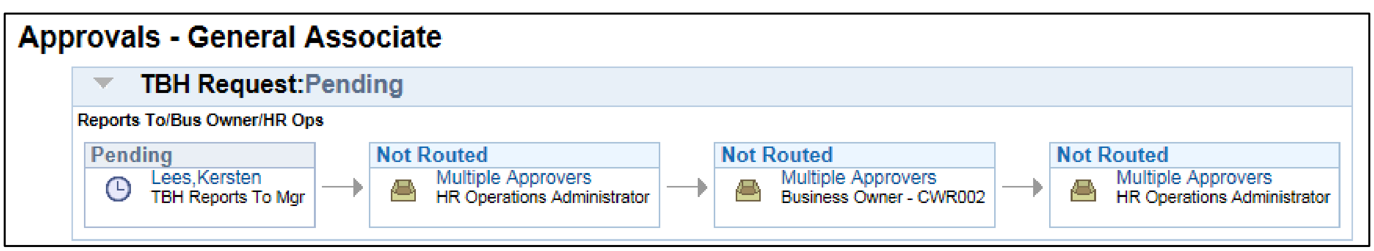


TBH Approval Workflow

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 alerting him/her that a Template-Based Hire requires approval.

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

Viewing the Contract/Summary

A printable version of the contract/summary for this Template-Based Hire is available in the myUofC portal. To access this summary, follow the menu path: My work → Manager Self Service → Job and Personal Information → Template-Based Hire → TBH Contract/Summaries.

Follow the steps below to view the contract/summary:

1. Choose your search criteria using the **Search by:** dropdown.
2. Enter your specific search request (last name, employee ID, request ID, etc…) into the **Search by:** field.
3. Click **Search**.
4. Once the search has completed, click the specific TBH you are looking for and in the **TBH Contracts/Summaries** page, click **View Document**.

The contract opens in a new window in your browser.