

Initiate a Template-Based Hire – Casual AUPE Hourly (Operating)

Purpose: This reference guide takes you through the process of hiring or rehiring an individual who will be paid from an operating budget to augment the regular workforce for no more than 30 work days per calendar year (Casual Augmentation), or to replace an employee who is absent from work for less than 20 consecutive days (Casual Replacement).

Definitions of casual appointment types are provided in Article 1 of the Alberta Union of Provincial Employees (AUPE) Collective Agreement.

Note: Recurring part-time hourly jobs are hired through the Job Opening Request Form (in Human Resources PeopleSoft), not a Template-Based Hire.

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 referred to Schedule A in the AUPE Collective Agreement for salary schedule information. When changes are made to salary scales, they become effective April 1st of each academic year.
 - Must have the individual’s personal information and job details on hand.

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.

Dashboard	All about me	My work
People management Manager self service Job opening request Template-based hire 2. Manage applicants My team learning Job Profile Database Onboarding checklists Human Resources site AUPE local 52 site MaPS executive site TUCFA site	Finance & Supply Chain Payment Selector Tool Create a Payment Request Create expense report Manage expenses Create requisition Manage requisitions Pending approvals Apply for PCard PCard reconciliation PER Statement Preferred suppliers Shipping & receiving SCM service request forms	Travel 1. Policy & procedures Travel & expense card Book travel International travel & risk Team travel Mobile phone roaming Vehicle Rentals



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. Click the **UC_AUPE_HOURLY** 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_ACCESS_REH_ADD	Sessional Instructor - Existing Empl ID
UC_AUPE_HOURLY	Casual AUPE - Hourly
UC_AUP_STU_HRLY	Student AUPE - Hourly
UC_CWR_AHS_REH	Gen Associate - AHS Research/Clinical (w/ Empl ID)

Step 4: Create Transaction

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

You arrive at the **Enter Transaction 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 **ACA Sessional hires** Job Effective Date is the first day of the **first full month** of the term (i.e. The Fall term starts 2018/08/27 so 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.

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

*Empl ID: NEW

*Job Effective Date: []

Action: Hire

Reason Code: Temporary

Continue Cancel



Step 5: Enter Transaction Details

To Hire a New Employee with no Existing Employee/Student ID

Leave the default NEW in the Empl ID field.

1. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select either the 1st or the 16th of the month to coincide with a new pay period.
2. Click **Continue**.

Add Template-Based Hire
Enter Transaction Details

*For **ACA Sessional hires** Job Effective Date is the first day of the first month 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.

Action Hire

Reason Code Temporary

2.

To Rehire someone with an Existing Employee/Student ID

You will require the **existing employee ID**. (Note: This does not apply to a Sessional or Grad template based hire.)

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.

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

Look Up Employee ID

Search by: Empl ID begins with 00000000 2.

3.

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

Message

Person ID 00000000 already exists in the system for Miranda Lotario (1007,61)

Select OK to continue the hire process with this Person ID. Select Cancel to enter a new Person ID.

4.

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

Search Results

View 100 First 1 of 1 Last

Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
00000000	Train12	May Zie Zie	Train12_May	(blank)	(blank)

5.

6. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select either the 1st or the 16th of the month to coincide with a new pay period.

Add Template-Based Hire
Enter Transaction Details

*Empl ID NEW

*Job Effective Date 6.

Action Hire

Reason Code Temporary

7.

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 Enter Personal Info Tab

1. On the **Enter Personal Info** tab, complete the following fields:
 - a. **First Name**
 - b. **Last name**
 - c. **Gender**
 - d. **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.

Enter the full name, gender, and email

Step 7: Complete the Personal Info cont. Tab

1. On the **Personal Info cont.** tab, complete the following fields:
 - a. **Address Line 1**
 - b. **City**
 - c. **Province**
 - d. **Postal Code**
 - e. **Telephone Number**
2. Click the **Enter Job Info** tab.

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

Enter the address and telephone number



Step 8: Complete the Enter Job Info Tab

1. Select **UCALG** in the **Business Unit** field.
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 **Job Code** dropdown and select the applicable hourly job code.
4. 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.
5. Click the **Employee Classification** dropdown and make your selection: **Casual Aug** for Casual Augmentation or **Casual Rep** for Casual Replacement. See Article 1 of the AUPE Collective Agreement for descriptions of both casual employee classifications.
6. Click the **Union Code** dropdown and select **AUP – AB Union Provincial Empl.**
7. Enter the correct hourly **Compensation Rate**.
8. Enter an appropriate **Business Title**.
9. 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

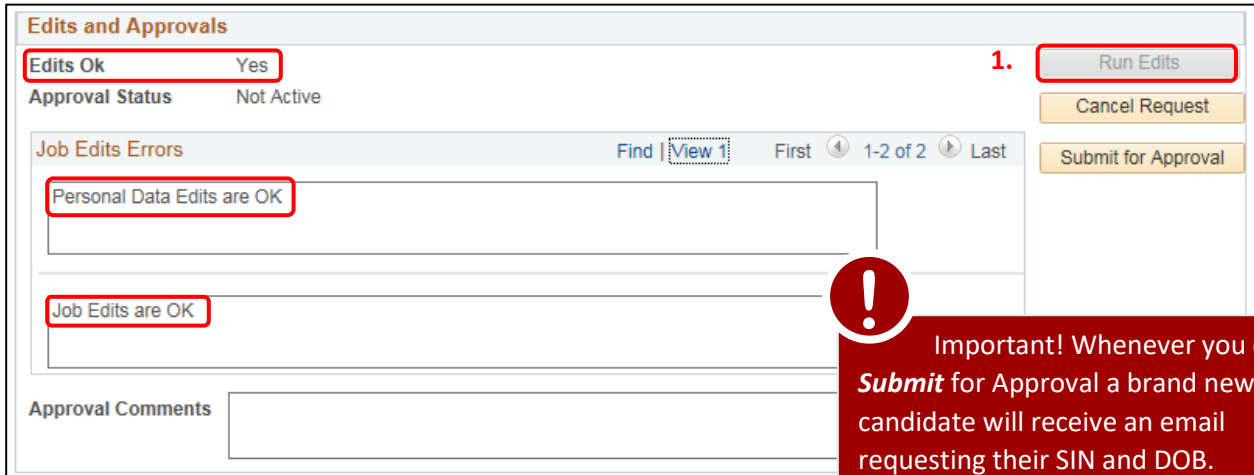
The information entered into the template is now transferred to the Manage Hire Details page. This provides you with an opportunity to review and validate your entries prior to submitting for approval.

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:

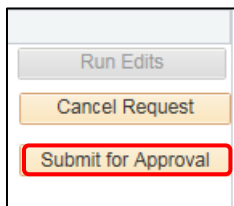
- **Edits Ok = Yes**
- **Under Job Edits Errors**
= Personal Data Edits are OK
= Job Edits Errors are OK

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.

Once the edits are ok, click Submit for Approval.

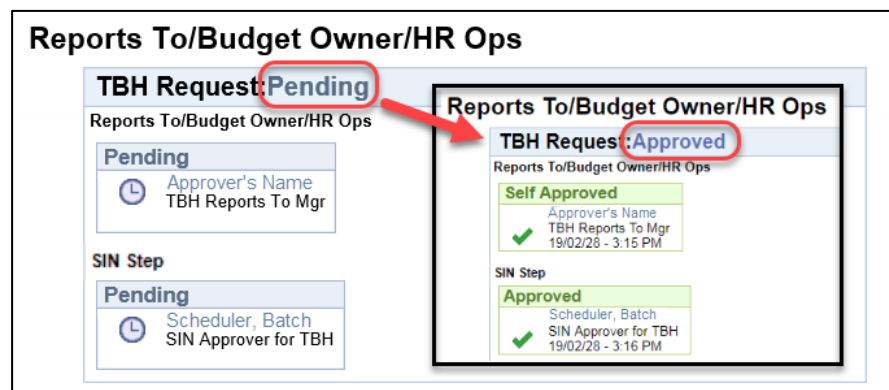


TBH Approval Workflow

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. This includes a brand new candidate who will receive an email with instructions to submit their SIN and DOB.

An approver's name is displayed in the approval box, followed by any other required reviews and approvals.



The screenshot shows two side-by-side panels for 'Reports To/Budget Owner/HR Ops'. The left panel shows a 'TBH Request: Pending' status. It includes a 'Pending' box with a clock icon and the text 'Approver's Name TBH Reports To Mgr', and a 'SIN Step' box with a clock icon and the text 'Scheduler, Batch SIN Approver for TBH'. The right panel shows the same request after approval, with 'TBH Request: Approved' status. It includes a 'Self Approved' box with a green checkmark and the text 'Approver's Name TBH Reports To Mgr 19/02/28 - 3:15 PM', and a 'SIN Step' box with a green checkmark and the text 'Scheduler, Batch SIN Approver for TBH 19/02/28 - 3:16 PM'. A red arrow points from the 'Pending' status in the left panel to the 'Approved' status in the right panel.

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.
- Once all reviews and approvals have passed, HR Operations processes the TBH to create the **Casual AUPE – Hourly** 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