Creating a New Academic Administrative Appointment

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The Add a Concurrent Job eForm is used to process an Academic Administrative Appointment transaction for active Academic staff.

Academic Administrative Appointments would be created for the following Appointments:

- Associate Dean
- Assistant Dean (Non-APO)
- Chairs
- Associate Chairs
- Assistant Chairs (Non-APO)
- Director

In this topic you will learn how to create an Academic Administrative Appointment eForm.
Academic Administrative Appointment

A list of requirements that the Concurrent Job eForm must include is provided below:

- All Administrative Appointments must have a position number
- All Administrative Appointments must have standard hours of 1.000
- All eForms must have the recommendation letter from the Provost attached
- All eForms must have the recommendation letter from the Dean attached
- eForm Action = Hire
- eForm Reason = Admin Appt.

If you are required to re-appoint an existing Academic Administrative Appointment use the 'Take Other Job Change' action, change the end date of the reappointment and attach the appropriate supporting documentation.

The page layout, the fields available, and pre-populated data on the Concurrent Job eForm may vary depending on the type of information that is added.

Procedure

Navigation Path:
Main Menu > UofA eForms WorkCenter > Add an eForm

5 Steps to Creating an eForm for a Concurrent Job

1. Conduct a search to find the existing Person ID.

2. Select an Active Employee Record.


4. Change the Compensation Information.

5. Submit the eForm for Approval.
Note: Before you begin the hire eForm process ensure you have the following information on hand:

1. Scanned copy of the Appointment Letters
2. Position Number
3. Combination Code
4. Position Number of the person the Administrator will report to

1. Once you have navigated to PeopleSoft HCM, Click the Main Menu menu.

2. Click the UofA eForms WorkCenter menu.

3. In the Menu on the left hand side of the screen, Click the Add an eForm link.

4. Click in the Person ID field.

5. In this example, it was determined that the employee will require an Academic Administrative Appointment.

6. **Step 1: Conduct a search for the existing Person ID**

   This search will help to identify the Person ID which already exists and reduce the probability of having multiple Personal IDs for the same person.

   **Important!** If an existing Person ID is found, that ID number should be used on the eForm.
7. Enter search criteria. Include one or a combination of the following options:

- Person ID
- Social Insurance Number (SIN)
- First Name
- Last Name
- Gender
- Date of Birth

**Note:**
If searching by Person ID or SIN, do not add other personal information.

If you do not know the SIN or Person ID, it is recommended to search by first name, last name, and birth date.

**Important!**
All fields within eForms are case sensitive. This means the format you use in your search must match what was used when the employee was originally entered.

For example, if an employee record was entered using all upper case letters (eg. JOHN DOE) the system will save it that way. When a search is done, you will need to remember that the name was entered in all upper case.

For this reason, a standard format for Names is to be followed starting May 30, 2017. Enter the first letter in upper case and the following letters in lower case. (eg, John Doe)

However, for older records you may need to conduct a search using different formats when using the name as search criteria.
8. In this example, Enter the employee's Person ID "1537527" into the Person ID field.

9. Click the Search button.

10. The search may take some time to process.

    You may notice an animated icon appear in the top right of the page. This is the processing icon and indicates that the system is processing the information you entered. The icon will disappear when the processing is complete.

    Ensure that this processing icon is gone before continuing to the next step.

11. One of two things will happen.

    • **Match Found**
      If a match is found for the search criteria entered, select the appropriate record from the Search Results.

    • **No Match Found**
      If the search does not return any matches, the employee is no longer active and you will need to create a Hire eForm to activate the employee. Refer to the topic 'Rehiring an Employee' for further details.
12. When the search returns records, it is important to understand the information that the Results grid provides.

The Has Job column indicates if the record applies to:
- Active Job (Green Check box),
- Inactive Job (Yellow check box) or
- No Job (blank field).

The Info column contains an information icon that, when you click on it, provides more details pertaining to the record. This link is helpful when trying to decide which record to select for the Job Change.

13. **Step 2: Select the Active Employee Record.**

Choose the appropriate record from the Results grid if more than one record is displayed.

In this example, click the Empl ID of the record provided.
14. **Step 3: Select an Action**

Provided is a list of actions that can be done in relation to Adding an eForm.

To create an eForm for an Academic Administrative Appointment, Click the **Add Concurrent Job** link.

**Note:** The eForm ID is assigned at this point and will appear in the top right of the screen.

15. The current address on the personnel file will pre-populate the form.

Click the **Next >>** button.

**Note:** Take note of the Empl Record for this employee. This Empl Record reflects the Active Job selected initially.

When the concurrent job has been added ensure there is a change to the Empl Record number.
Important!
All information entered from this point forward is Effective Dated.

Warning!
Because the information is effective dated, if you change the effective date after leaving this first page, the system will blank out all of the information you entered and you will have to start over.

16. Enter or select the Effective Date.
   Use the date as indicated on the Appointment Letter. These dates should always align.
   For example purposes, enter “15/06/2017”.
   Click the Choose a date (Alt+5) button.

17. Click the Look up Employment Type: (Alt+5) button.
18. Click the **Academic** link.

19. Click the **Look up Employment Subtype: (Alt+5)** button.
20. Click the **Admin Appt** link

21. Click the **Look up Employee Group: (Alt+5)** button.

22. Click the **177 Administrative Appt (PT)** link.

**Note:** All Academic Administrative Appointments require a position number.

Fields from the position number will auto populate into the remainder of the form.

23. Enter the **Position Number: Required**.

For example purposes, enter "00006292".
24. Enter the end date of the administrative appointment.

   Click the **Choose a date (Alt+5)** button.

25. Click the **Next >>** button.
26. Enter a rate into the *Compensation Rate: Required field.

For example purposes, enter "5000."

*Compensation Rate: 5000.00

27. A list of valid Earning Codes for that Employee Type is provided. Select the appropriate Earnings Code.

In this example, click the Look up Earnings Code (Alt+5) button.
28. Click the **385 Administrative Stipend (Pen)** link.

29. The Earnings Code MUST be entered before selecting the Combo Code.

    Click the **Select Combo Code** button.

**Note:** The **SEARCH OPTIONS** section allows you to search by Combination Codes or by Speed Types (i.e. if you have the Speed Type (code) and need to search for the Combo Code.)
30. If you know the Combo Code, you can enter it in the Combination Code field. Otherwise, enter the known information into the ChartField Detail grid.

31. In this example the ChartField Detail grid is used to find the appropriate Combo Code.

   Enter into the Fund Code: field. Enter "210".

32. Use the Tab key to go to the next field.

   In this example, enter "360710" into the Department field

33. Click the Search button.
34. Review the Combo Codes returned in the search, then

   Click the **Select** button.

35. You are returned to the ChartField Detail page.

   Click the **Ok** button.
36. Scroll to the right and enter the percentage you would like allocated to the combo code selected.

**Note:** The total percentage amount within the grid MUST equal to 100.

In this example, Enter "100.".

37. Click the **Next >>** button.

38. You may enter the Direct Deposit information on this page if it is available. Otherwise, you can skip to the next page.

Employees will have access to update or add this information through Bear Tracks.

Click the **OK** button.
39. Click the Next >> button.

40. The File Attachments section provides you the opportunity to add the applicable attachments to the eForm. Refer to the 'Adding Attachments to eForms' topic for further details.

   Click the Appointment Letter list item.

41. Click the Upload button.

42. Search for your attachment using the Browse option.
43. Click the **Upload** button.

44. The **Action Items** section indicates that the employee must provide a valid social insurance number and that you have informed the employee of this obligation.

   Click the **SIN Verification** option.

45. The **Comments** section allows you to enter any additional information related to the Appointment.

   When you click on the Comments option a field will open and allows you to enter any comments.

   Click the **Expand section** button.

46. For this example, Enter "**Any information out of the ordinary.**" in the **Comments Section.**
47. At the bottom of the page you can choose one of the following actions.

**Save**
Saves all the information entered but does not submit the form for approval. You can submit the form at a later time.

**Submit**
Saves all the information entered AND Submits the eForm for approval.

Click the **Submit** button.

48. Congratulations! You have completed the training on Creating a New Academic Administrative Appointment.

**End of Procedure.**