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Hiring a Graduate Teaching Assistant

Graduate Students include the following positions.

- Graduate Teaching Assistant (GTA)
- Graduate Research Assistant (GRA)
- Graduate Research Assistant Fellowship (GRAF)
- Short Term Academic Related Employment (STARE)


In this topic you will learn how to create a Hire eForm specifically for a Graduate Teaching Assistant (GTA)

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**Procedure**

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

1. **Before** creating a Hire eForm ensure you have the following information about the person being hired.
   - Effective Date (the person's date of appointment)
   - Job Code (for Non-Position Hires)
   - Combo Code
   - Reports To ID (Position Number of Supervisor)
     If supervisor has no position number, use Supervisor ID.

   This will help to make the creation process smoother.

2. Once you have navigated to PeopleSoft HCM, Click the **Main Menu** button.

3. Click the **UofA eForms WorkCenter** list item.
4. In the Menu on the left hand side of the screen, Click the **Add an eForm** link.

5. In order to view more of the eForm, minimize or close the left hand menu.

   Click the **Minimize** button.
6. **10 Steps to Creating a Hire eForm for a Graduate Student**

1. Conduct a search to confirm if the person has an existing Person ID.
2. Add Person for Hire.
3. Enter the person's Personal Information.
4. Enter Basic Job Information.
5. Enter Job Information.
6. Enter Compensation Information.
7. Enter Direct Deposit Bank Information (Optional).
8. Enter UofA Specific Information.
10. Submit the eForm for Approval.

In this example, Laurel Hamilton is being hired within the Physics Department as a Graduate Teaching Assistant for one year starting March 16, 2017.

7. **Step 1: Conduct a search to confirm if the person has an existing Person ID.**

   In some cases, the person being hired may be associated with the University as a current or former employee, student, applicant or guest.

   This search will help to identify if a Person ID 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 is to be used on the eForm, rather than creating a duplicate Person ID.
8. 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 that the format you use to enter information, such as First and Last name, is how the system will record and save the information.

For example, if you enter a name 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 is to be followed by entering the first letter in upper case and the following letters in lower case.**

**YES:** Jason Bourne

**NO:** JASON BOURNE
**NO:** jason bourne

9. In this example, a combination of fields are used to conduct the search.

   Enter "Laurel" into the **First Name** field.

**Important!**
It is important to use the [Tab] key to move to the next field because the system validates the information entered into each field when you leave the field.

10. Enter "Hamilton" into the **Last Name** field.

11. Click the button to the right of the **Gender** field.

12. Click the **Female** list item.

13. Click the button to the right of the **Date of Birth** field.
14. Select the Month, Year and Day of the person’s birthday.

In this example, click **February 20, 1980**.

![Calendar showing February 20, 1980 as highlighted date]

15. Click the **Search** button.

16. 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 the processing icon is gone before continuing to the next step.
17. One of two things will happen.

- **Match Found**
  If a match is found for the search criteria entered, the person is not a new hire. Refer to the topic 'Rehiring an Employee' for further instructions.

- **No Match Found**
  If the search does not return any matches, the person must be added into PeopleSoft.

18. In this example, the search returned no results.

This indicates that the employee does not exist and you may continue to Step 2: Add Person for Hire.

19. If the search returned results, select the line that has an active job and continue to Step 3: Enter the Person's Personal Information, to confirm that the information entered is correct.

20. **Step 2: Add Person for Hire**

Click the **Add Person for Hire** button.

**Note:** The eForm ID is assigned and appears in the top right of the screen.

21. **Step 3: Enter the Person’s Personal Information.**

Enter data into the relevant fields on the Hire Personal page.
22. In this example, select the appropriate Name Prefix for the person.
   
   Click the button to the right of the Name Prefix field.

23. Click the Ms list item.

24. The information used to conduct your search will automatically populate into the corresponding fields.
   
   Ensure that the legal name is entered in the First and Last Name fields and confirm that the other defaulted information is correct.
   
   In this example, the Name, Gender, and Date of Birth fields automatically populated with the search information used.

25. Enter the person’s SIN number into the Social Insurance # field. If you do not have the SIN number use the default entry of 999999999.
   
   In this example, enter "999999999" into the Social Insurance #: field.

   **Remember!**
   If using the default SIN of 999999999 at the time of the eForm creation, you have 3 days from the employee’s start date to provide the employee’s SIN to Human Resource Services.
26. All fields marked with an asterisk ( * ) indicates a required field and must contain information.

**Note:** Each time you move to a different field, the system validates the information entered. This validation may take some time to process.

Before continuing to the next field, ensure that the processing icon no longer appears in the top right corner of the page.

Press [Tab] until you get to the next field.

27. The 'Citizenship' fields **MUST** be entered and should represent where the person is from.

Click the button to the right of the *Citizenship Country* field.

28. A list of valid Citizenship Countries is provided. Select the appropriate value.

In this example, Click the CAN [Canada] list item.

**Note:** When the Citizenship Country field is CAN (Canada), the Citizenship Status field should be C.

Click the button to the right of the *Citizenship Status* field.

29. A list of valid values is provided based on what is entered in the Citizenship Country field.

In this example, Click the C [Canadian Citizen] list item.

30. **Important!**

The **Home Address and Phone Numbers** section is used to record the person’s Canadian residence while working for the U of A.

If no Canadian address is provided, use the hiring department’s address.

31. Click the button to the right of the *Country* field.

32. A list of Countries is provided. However, only the Canada option is used for this field.

Click the CAN [Canada] list item.
33. Enter the Person's Home Address in Canada into the **Address 1:** field.

   **Note:** The information entered in the Address 1 field is used on the person's T 4 and pay checks.

   In this example, enter "123 Hunter Way".

34. The Address 2 through Address 4 fields are used to add additional lines related to one address.

   For example,
   Address 1: Box 12345  
   Address 2: 2236 - 123 Ave SW

35. Enter the City into the **City:** field.

   In this example, "Leduc" into the **City** field.

36. Click the button to the right of the **Provo** field.

37. A list of valid options is provided based on what is entered in the City field. Select the appropriate value.

   In this example, Click the **AB [Alberta]** list item.

38. Enter the Postal Code with a space as the separator, into the **Postal:** field.

   In this example, enter "TE 0 M 4" into the **Postal** field.

39. Enter the Home Phone Number, without any spaces or separations, into the Home Phone field.

   In this example, enter "7806505995" into the **Home Phone** field.

40. The system will automatically add the separators to distinguish between the area code and the phone number.
41. Click the **Next** button.

42. **Step 4: Enter Basic Job Information**

   Within the **Job Information** Page the Employee Information section is populated based on what was entered on the previous page.

   The Person ID will show as `NEW` until the form is saved or submitted. Only after saving or submitting the form will the Person ID be automatically assigned.

   **Important!**
   All information entered from this point forward is Effective Dated.
43. Click the button to the right of the *Effective Date field.

44. Select the student's date of appointment.

   In this example, click September 20, 2017.

   **Important!**
   The Effective Date MUST be entered.

   Ensure that this date is correct and matches the date on the appointment letter. If you change the Effective Date later, other job-related information that was entered will be cleared out and will need to be re-entered.

45. Click the button to the right of the Employment Type field.
46. A list of valid Employment Types is provided. Select the appropriate Employment Type.

In this example, click the **Student** list item.

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>Academic</td>
</tr>
<tr>
<td>Excluded</td>
<td>Excluded</td>
</tr>
<tr>
<td>Person of Interest</td>
<td>Person of Interest</td>
</tr>
<tr>
<td>Student</td>
<td>Student</td>
</tr>
<tr>
<td>Support</td>
<td>Support</td>
</tr>
<tr>
<td>Trainee</td>
<td>Trainee</td>
</tr>
</tbody>
</table>

47. Click the button to the right of the **Employment Subtype** field.

48. A list of valid Employment Subtypes is provided. Select the appropriate subtype.

- GRAF [Graduate Research Assistant Fellowship]
- GTA/GRA [Graduate Teaching Assistant/Graduate Research Assistant]
- Other Academic Templet [Other Academic Employment Type]
- Scholarship/Bursary

In this example, click the **GTA/GRA** list item.

49. Click the button to the right of the **Employee Group** field.

50. A list of valid Employee Groups is provided based on what was selected in the previous fields. Select the appropriate Employee Group.

In this example, Click the **228 [Graduate Teaching Assistant]** list item.

**Important!**

The **Employee Group** is a crucial piece of information which determines the information provided within the eForm. Therefore, if you change this field later, other job-related information that was entered will be cleared out and will need to be re-entered.

51. **Step 5: Enter Job Information**

Once you have selected the Employee Group information, the **Job Info** section will open up.

52. Click the button to the right of the **Job Code** field.
53. A list of valid Job Codes are provided based on what was entered in the Basic Job Info section.

The Job Codes for the GTA/GRA employment group, contain a numerical value at the end of the description. This value represents the standard number of hours the person will be working. It is important to select the correct Job Code because it populates other fields within the eForm.

Select the appropriate Job Code.

In this example, click the S 0010 [Grad Teaching Assistant 10] list item.

54. Enter the 6 digit Department Number into the *Department field.

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

55. The Department field is secured to provide only those Departments which you have security access for.
**Note:** The Location, Standard Hours and FTE fields are automatically populated. Confirm that these are the correct values.

DO NOT change the Standard Hours or the FTE fields. If the information is incorrect, go back to the Job Code Field and select the Job Code that reflects the correct hours.

56. Click the button to the right of the *Appointment End Date* field.

57. Select the last day that the person will work.

   In this example, click **March 31, 2018**.

58. **Always** enter the **Reports To ID** (Position Number of Supervisor).

   However, if you don’t have the position number, enter the Supervisor ID (Employee ID of the Supervisor). The system will only allow you to enter one or the other.

   One of these fields MUST be populated to continue.

   In this example, enter "**00001548**" into the **Reports To** field.

   **Note:** The Reports To field updates the Job information not the Position information.

59. From this point forward you can Save the eForm and return to it at a later time to complete.

   (Remember to record the eForm ID.)

   You will need to use the Update an eForm menu option when returning to complete the eForm. Refer to the 'Updating an eForm' topic for further details.
60. Click the **Next** button.

61. **Step 6: Enter Compensation Information**

   The **Compensation Information** page will appear.

62. **The One Time Pay** section is used to pay the person a lump sum amount only once.

   **Note:** The **One Time Pay** section is **NOT used for GTA/GRA**.

63. Within the **Compensation Information** section, the Salary Plan and Grade information automatically default based on the Job Information entered on the previous page.

   Ensure the defaulted information is correct.

64. The information entered in the Basic Job Info section will help to identify which of the Compensation Information fields need to be filled out.

   The **Step** field **MUST** be chosen when hiring a **GRA/GTA**, as this defines which program the person is in.

   When hiring a **GRAF**, the **Compensation Rate** field **MUST** be populated with a value.

65. Click the button to the right of the **Step** field.
66. A list of valid programs are provided.

For a GRA/GTA the values provided represent a program.

**Value 1** → used for students in Master’s Program

**Value 1.5** → used for Students in PHD Program

**Value 2** → used when Job Code S 0012 is entered and is a Principal Instructor (Em[pal Group 229). (Value 2 is only visible when hiring a Student for 12 hours (Employ Group 228) but is only used for Principal Instructors)

**Value 2.5** → DO NOT select.
This value represents the award portion for the GTA/GRA and is pre populated in the Supplemental Pay Grid.

67. Select the applicable value representing the appropriate program.

In this example, click the **1 Masters Program** list item.
**Note:** The system will allow you to increase the defaulted compensation rate but not decrease it.

If you have entered a compensation rate that is less than the minimum amount setup within the system, a message will appear indicating that the compensation rate must be greater than or equal to a specific amount.

An example of this message is provided.

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68. **For GRA/GTA Employment Types Only:**

The Award amount will appear once the Step is entered.

The Award amount is system generated and the distribution is automatically assigned within the Supplemental Pay grid.
69. **Retro Pay Required Option**

This option will automatically be selected if the effective date entered is in the past and the pay period for that date is closed and Pay Confirm has been run.

70. **Contingent Option**

This option is used for Academic Staff Hires only.
71. The **Compensation Distribution** section is used to specify how the person’s salary and benefits are to be distributed.

   Click the button to the right of the **Earnings Code** field.

![Image of Earnings Code field]

72. A list of valid Earning Codes for that Employee Type is provided. Select the appropriate code.

   In this example, click the **003 Regular Salary** list item.

73. Click the **Select Combo Code** button.

![Image of Select Combo Code button]

**Note:** The **SEARCH OPTIONS** section allows you to search by Combination Codes or by Speed Types. (if you have the Speed Type (code) and need to search for the Combo Code.)

![Image of ChartField Detail grid]

74. 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.

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

   Enter "210" into the **Fund Code** field.
76. In this example, Enter the Department Number "360710" into the **Department** field.

77. Continue to enter information into ALL of the ChartField Detail grid fields including "0" entries.

In this example, enter "0" into the **Program Code** field.

78. Enter "0" into the **Class Field** field.

79. Once you have entered either the Combo Code or all of the ChartField Details, Click the **Search** button.

80. The valid Combo Code is provided.

Click the **Select** button.

81. You are returned to the **ChartField Detail** page.

Click the **Ok** button.

82. The Combo Code Fields column auto populates based on the combo code you selected.
**Note:** If you choose a combo code setup up with the TriCouncil option, a new section will appear on your eForm prompting you to enter the reason for the TriCouncil option.

This option is not shown in this example.

### Step 83.
Scroll to the right and enter the percentage you would like allocated to the combo code selected.

Keep in mind that the total percentage amount within the grid MUST equal to 100.

In this example, enter "100" into the **Percent of Distribution** field.

### Step 84.
You can choose to **Add** another line and follow the same steps to create another distribution line if required.

### Override Benefits Distribution Option

The Benefits Distribution for the employee is automatically allocated based on a combination of the information entered on the eForm. In the rare occurrence that you need to change the benefits distribution, you can select this option and continue filling out the grid similar to what was done in the Compensation Distribution grid.
86. **Stat Deduction Distribution Option**

   This option refers to the Statutory Deductions for the employee and is automatically allocated based on a combination of the information entered on the eForm. In the rare occurrence that you need to change the Stat Deduction distribution, you can select this option and continue filling out the grid similar to what was done in the Compensation Distribution grid.

87. **Hire with Supplemental Payment Option**

   The Hire with Supplemental Payment option is used for payments in addition to salary and indicates the distribution of pay in terms of Awards.

88. **Supplemental Pay - Ongoing**

   If the employee is eligible for Ongoing Supplemental Pay the Supplemental Pay - Ongoing grid needs to be filled out.

   ![Supplemental Pay Grid](image)

89. **For GRA/GTA Employment Types Only**

   The Supplemental Pay area will automatically be checked and reflects the Award amount. The **Supplemental Pay - Ongoing** grid will be populated with the default distribution information. Do Not change this line entry unless a different combo code is required for distribution purposes.

   **Note:** The GTA/GRA Award value that auto populates cannot be changed.
90. Additional 'ongoing' supplemental pay options which can be entered into this grid includes the following.

- Regular Salary (Non Pen)
- Scholarship with Fees
- Bursary (T4A)(No Tax)
- Fellowship
- Scholarship (T4A)(No Tax)

To add an additional row to the Supplemental Pay - Ongoing grid, click the + (Insert a Row) icon located on the far left within the Supplemental Pay - Ongoing grid. Then enter the information as prompted in each field for the new line.

91. **One Time Supplemental Pay Option**

If the employee is eligible for a Lump Sum supplemental pay, click the One time Supplemental Pay option and the Supplemental Pay - One Time grid will appear for you to fill out.

**Note:** If the employee is eligible for both types of supplemental pay, ensure you enter the correct information into the appropriate grid.

92. Additional 'one time only' supplemental pay options which can be entered into the Supplemental Pay - One Time grid includes the following.

- Regular Salary (Non Pen)
- Scholarship with Fees
- Bursary (T4A)(No Tax)
- Scholarship (T4A)(No Tax)
- Scholarship - One Time Only

**Warning!**

If you realize that this employee is not eligible for Supplemental Pay you need to first remove the information entered in the supplemental grids.

Deleting the information in each field in the grid ensures that the system does not save the entries.

93. Click the **Next** button.
94. Click the **OK** button.

Direct Deposit (20002.16013)
Direct deposit is mandatory for all employees and banking information should be entered before leaving this page

95. **Step 7: Direct Deposit Bank Information (Optional)**

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

For staff privacy purposes, only you as the originator will be able to see this page. Any approvers will not see this page or the information on it.

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

Click the **Next** button.
96. **Step 8: Enter UofA Specific Information**

This page is used to record U of A Specific Information. The options provided on this page may differ depending on the Job Information entered.

97. **Working Outside of Province Option**

This option is used when the employee's home address is local but they are working in a different province.

98. Click the **Next** button.

99. Three sections within the **Submit Page** require review before submitting the eForm for approval.

100. The **Action/Reason** section automatically defaults for a New Hire. Ensure the appropriate Action/Reason information is correct.

**Note:** If the Action/Reason you are looking for is not available, leave the fields as the default entries and use the Comments section to record the actual action and reason for the hire.
101. **Step 9: Add Required Attachments**

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.

**Important!**

All 'Required' documents must be attached or HRS will recycle the eForm back to you, which causes a delay in the approval process.

A list of attachments required with eForm submission is provided on the Standard Use Reference document.

102. **Step 10: Submit eForm for Approval**

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

**Note:** The eForm cannot be submitted if the checkbox has not been selected.

Click the *SIN Verification* option.
103. The **Comments** section allows you to enter any additional information related to the employee.

**Important!**
Include any additional setup requirements and employee related information that has not been captured in the eform.

In this example, Click the **Comments** button.

104. In this example, enter "**Add Comments as required**" into the **Comments** field.

105. At the bottom of the page you have a few options to choose from.

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

**Withdraw** option (not shown)
Cancels your request and removes all of the information entered.

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

106. Click the **Submit** button.
107. If you entered the default SIN 999999999, two warning message will appear.

No further action is required.

Click the **OK** button.

108. The **Finalized** page provides the approval workflow and the stage that the form is at.

109. Within the Stage boxes is a link that will display either the name of the Approver or "Multiple Approvers" if there are multiple approvers for that stage.

110. All approved eForms will go to Human Resource Services for final approval prior to loading into PeopleSoft HCM.
111. The **Transaction/Signature Log** section is where the audit trail is kept which is date and time stamped and provides the different stages pertaining to where eForm is at.

The eForm stages you may see are as follows.

- **Saved**...................... Form Not Submitted for approval
- **Pending** ................. Waiting for Approval
- **Partially Approved** .... At least one approval has been completed
- **Withdrawn** ............... Originator withdrew the eForm
- **In Error** ................... HRS is to investigate the eForm further
- **Authorized** .............. All approvals complete; Ready to load into PeopleSoft HCM
- **Denied** ..................... Approver has denied the eForm
- **Executed** ............... eForm has been uploaded into PeopleSoft HCM
- **On Hold** ................. Approver requires more time to action

112. Congratulations! You have completed the training on creating a Hire eForm for a Graduate Teaching Assistant.

**End of Procedure.**