Creating a Hire eForm for Support Staff

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In this topic you will learn how to create a Hire eForm for Support Staff.

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To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

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Procedure

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

**9 Steps to Creating a Hire eForm for Support Staff**

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. Direct Deposit Bank Information (Optional).
8. Enter UofA Specific Information.
9. Submit the eForm for Approval.
1. Before creating a Hire eForm ensure you have the following information, about the person being hired, readily available for referencing.

   • Effective Date (the person's date of appointment)
   • Position Number (for Position Hires)
   • Job Code (for Non-Position Hires)
   • Combo Code
   • Supervisor ID or Position Number of the person the employee will report to

   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 menu.

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

5. In this example, Diane Smith is being hired for two weeks as a Casual Level 1 Support Staff, within the Physics Department, starting March 16, 2017.
6. **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.

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.

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

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

First Name [ ]
9. **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 after you tab out of the field.

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

11. Press [Tab].

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

13. Click the **Female** list item.

14. Press [Tab].

15. Click the button to the right of the **Date of Birth** field.

16. Select the Month, Year and Day of the person's birthday.

   In this example, click the **February 19, 1957**.

17. Click the **Search** button.
18. 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.

19. One of two things will happen.

- **Match Found**
  If a match is found for the search criteria entered then 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.
20. 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.

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

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

![Add Person for Hire button](image)

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

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

Enter data into the relevant fields on the Hire Personal page.
24. **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 for Names is to be followed. Enter the first letter in upper case and the following letters in lower case.

**YES:** Jason Bourne

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

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25. Click the button to the right of the **Name Prefix** field.

Name Prefix:
26. Select the appropriate Prefix.

In this example, click the **Ms** option.

![Image of a screenshot showing the prefix selection step]

27. 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.

28. If the default 999999999 displays in the **Social Insurance #** field, update the field with the correct SIN, if available.

   In this example, enter "999999998" into the **Social Insurance #** field.

   ![Image of a screenshot showing the social insurance number input step]
29. **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.

30. All fields marked with an asterisk (*) indicates a required field and must contain information.
31. **Note:** When you move to a different field, the system validates the information. This means it 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.

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

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

Click the **CAN [Canada]** list item.

34. **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.
35. A list of valid values is provided based on what is entered in the Citizenship Country field. Select the appropriate value.

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

36. 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.

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

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

Click the CAN [Canada] list item.

39. Enter the person's Home Address into the Address 1 field.

In this example, enter "3855 85 STREET NW".
40. The Address 2 through Address 4 fields are used to add additional address lines related to one address.

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

41. Enter the person’s home City into the *City field.

In this example, enter "Edmonton".

42. Enter the Province into the *Prov: field.

Click the button to the right of the *Prov field.

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

Click the AB [Alberta] list item.
44. Enter the Postal Code with a space as the separator, into the **Postal: Required** field.

   ![Postal Code Input Field]

   In this example, enter **"T5J 4L4"**.

45. Enter the person's Home Phone Number, without any spaces or separations, into the **Home Phone** field.

   ![Home Phone Input Field]

   In this example, enter **"7809999999"**.

46. When you tab out of the Home Phone field, the system will automatically add the separators to distinguish between the area code and the phone number.

47. Click the **Next >>** button.
48. **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.

49. **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.

50. **Click the button to the right of the *Effective Date* field.**
51. Select the person's date of employment.

In this example, click **March 16, 2017.**

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

Ensure that this date is correct. 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.

53. Click the button to the right of the **Employment Type** field.

54. A list of valid Employment Types is provided. Select the appropriate Employment Type.

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

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

56. A list of valid Employment SubTypes is provided. Select the appropriate subtype.

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

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

58. 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 **133 [Casual Level I Operating]** list item.
59. **Step 5: Enter Job Information**

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

![Job Information Screen]

60. Enter the Job Code, if known, into the *Job Code* field. Otherwise use the look up feature.

   In this example, click the button to the right of the *Job Code* field.

   *Job Code:

61. A list of valid Job Codes are provided based on what was entered in the Basic Job Info section.

   You can use the **Search by** function to view a more condensed list.

   In this example, enter "N0018" into the **begins with** field.
62. Click the **Look Up** button.

63. Click the **N0018** option.

64. **Note:** Each time you Tab to the next field the system validates the information entered. Validation may take a few seconds before the system will allow you to continue in the next field.

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

   The lookup feature for this field provides a list of your departments to choose from.

   In this example, Enter "360700" into the **Department: Required** field.

66. The Location field automatically populates based on the Department number entered.
67. **Note:** The Standard Hours and FTE (Full Time Employment) fields automatically populate based on the Job Code selected.

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.

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

69. Select the last day the person will work.

In this example, click **April 30, 2017**.
70. **Important!**  
The **Intermittent Work** checkbox is used to indicate that the employee is working less than 0.40 FTE (<40% of a Full Time Employee's hours) and is working sporadic hours.

If the Intermittent Work checkbox is selected you will also need to change the 'Probation Type' field to Not Applicable within the UA Specific Information page.
71. Enter the **Reports To** ID (Position Number of Supervisor).

    If you do not have a 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.

72. **Warning!**

    The look up feature will provide a list of ALL positions, therefore it is important to know the position number to be entered in these fields.

73. In this example the Supervisor ID field is used.

    Enter the Reports To "1382695" into the **Supervisor ID** field.

74. The system will validate the ID entered.

    Press [Tab].
75. 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.

76. Click the **Next >>** button.

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

    The **Compensation Information** page will appear.

    Refer to the Human Resource Services ([http://www.hrs.ualberta.ca/](http://www.hrs.ualberta.ca/)) web site for details on what an employee is eligible for.
78. The **One Time Pay** section is used to pay the person a lump sum amount only once. Refer to the One Time Payment related topics for further details.
79. Within the **Compensation Information** section the Salary Plan and Grade information will automatically default based on the Job Information entered on the previous page.

Ensure the defaulted information is correct.

80. To select the appropriate Step, click the button to the right of the **Step** field.

81. A list of valid Steps to choose from is provided. The Value column represents the step listed on the employee agreements.

   In this example, click the **4.5** list item.

82. The **Compensation Rate** and **Compensation Frequency** will automatically default based on the Step selected.

   Review the information to ensure it is correct. If the Rate is not correct, change the Step.

   Press `[Tab]`. 
83. **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.
84. **Contingent Option**

This option is used for Academic Staff Hires only.

85. **Compensation Distribution** section is used to specify how the person’s salary and benefits are to be distributed within finance.

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

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

In this example, click the **018** list item.

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

Click the **Select Combo Code** button.

88. **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.

![Image of search options screen](image)

89. 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.

90. **Note:**
   - For a **Trust** employee provide the Trust combo code.
   - For an **Operating** employee provide the Operating combo code.
91. In this example the ChartField Detail grid is used to find the appropriate Combo Code.

Enter "210" into the Fund Code field.

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

In this example, enter "360700" into the Department field.

93. Continue to enter information into the remaining fields including those fields with a '0' value.

94. Once you have entered either the Combo Code or the ChartField Details, Click the Search button.
95. The valid Combo Code is provided. Click the **Select** button.

96. You are returned to the ChartField Detail page. Click the **Ok** button.
97. The **Combo Code Fields** column automatically populates based on the combo code you selected.

98. **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.

99. 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" into the **Percent of Distribution** field.
100. **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.
101. **Stat Deduction Distribution Option**

This option refers to Statutory Taxes that are deducted 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.

102. Click the **Next >>** button.

103. **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.

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

104. Click the **Next >>** button.
105. **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.

106. In the **Additional Job Data** section, select the type of probation the person is applicable for.

   Click the button to the right of the *Probation Type* field.

   ![Probation Type Field](image)

107. **Remember!**

   If you selected the **Intermittent Work** option on the Job Information page, the **Probation Type** field must be set to **Not Applicable**.

108. A list of valid options is provided. Select the appropriate probation type.

   In this example, click the **Not Applicable** list item.
109. **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.

110. Click the **Next >>** button.

111. **Step 9: Submit eForm for Approval**

   There are 3 sections within the **Submit Page** that require review before submitting the eForm for approval.

   ![Submit Page](image)

112. 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.
113. 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.

114. 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.
115. After reviewing the Description, you must acknowledge that you have read the Canada Revenue Agency requirements for SIN.

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

Click the **SIN Verification** option.

116. The **Comments** section allows you to enter any additional information related to the employee.

When you click on the Comments option a field will open and allows you to enter any comments.
117. **Important!**
Use the Comments section to include any additional setup requirements and employee related information that has not been captured in the eform.

118. 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.

119. Click the **Submit** button.

120. The **Finalized** page provides the approval workflow and the stage that the form is at.
121. 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.

Click the Multiple Approvers link.
122. The pop up window provides additional information about the approver(s).

Click the **Close** button.

123. Congratulations! You have completed the training on Creating a Hire eForm for Support Staff.

**End of Procedure.**