Creating a Hire eForm for Academic Staff
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Creating a Hire eForm for Academic Staff

In this topic you will learn how to create a Hire eForm for Academic 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

10 Steps to Creating a Hire eForm for Academic 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 Education Information

9. Enter UofA Specific Information.

10. 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, Elizabeth Taylor is being hired for two weeks as a Professor, within the Physics Department, starting April 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 using first name, last name, and birth date.

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

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

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 "Taylor" into the **Last Name** field.

11. Click the button to the right of the **Date of Birth** field.
12. Select the Month, Year and Day of the person's birthday.

In this example, click the April 2, 1970.

13. Click the **Search** button.

14. 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 the processing icon is gone before continuing to the next step.

15. 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.
16. 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.

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

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

18. **Note:** The eForm ID is assigned at this point and appears in the top right of the screen.
19. **Step 3: Enter the Person’s Personal Information.**

Enter data into the relevant fields on the Hire Personal page.

20. **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
21. 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 and Date of Birth fields automatically populated with the search information used.

22. 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 #: Required field.

23. 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.

24. All fields marked with an asterisk ( * ) indicates a required field and must contain information.
25. **Note:** When you move to a different field, the system validates the information. This may take some time to process.

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

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

27. A list of valid Citizenship Countries is provided. Select the appropriate Country.

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

28. **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 Citizenship Countries is provided. Select the appropriate Citizenship Status.

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.

In this example, enter "12538 167 Street NW".
34. 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

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

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

36. Enter the Province into the **Prov: Required** field.

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

37. **Note:** You can also use the Look Up button to select the province.

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

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

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

In this example, enter "**7805873333**".
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.

43. **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.

44. Enter the employee's date of appointment into the **Effective Date: field**.

Click the button to the right of the **Effective Date** field.
45. In this example click **April 16, 2017**.

![Calendar](image)

46. **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.

47. Click the button to the right of the *Employment Type:* field.

![Employment Type](image)

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

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

![Employment Type](image)

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

![Employment Subtype](image)

50. A list of valid Employment Subtypes is provided. Select the appropriate Subtype.

- APO [Administrative Professional Officer]
- Academic Casual
- Admin Appt [Administrative Appointment]
- CAST [Contract Academic Staff: Teaching]
- FAC [Faculty]
- FSO [Faculty Service Officer]
- LIB [Librarian]
- SOTS [Sessionals and Other Temporary Staff]
- TRAS [Trust/Research Academic Staff]

In this example, click the **FAC** list item.
51. Click the button to the right of the *Employee Group: field.

52. 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 173 [Full-Time] list item.

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

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

Press [Tab].
54. Enter the Position Number for the person into the **Position Number** field.

You can also use the Look Up button to view a list of positions to choose from.

In this example, enter "00008096".

55. All fields under the Position Number field will automatically populate based on what was entered.
56. The **Business Title** field and the **Long Business Title** field can be manually overwritten.

57. The **Override Position Data** option allows you to override the defaulted information related to the Position selected.

Click the **Override Position Data** option.
58. When the Override Position Data option is checked, the following fields become editable and can be changed as required.

- Full/Part Time
- Standard Hours
- FTE
- Reports To/Supervisor ID fields

59. **Note:** If changing the default information in the Reports To or Supervisor ID fields, the system will only allow you to enter one or the other. One of these fields MUST be populated to continue.

It is recommended to enter the Reports To ID (Position Number of Supervisor) whenever possible.

60. **Warning!** The look up feature for the Reports To field and the Supervisor ID field will provide a list of ALL positions, therefore it is important to know the position number to be entered in these fields.

61. In this example, no changes are required to the defaulted information.

Click the **Override Position Data** option.
62. 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.

63. Click the **Next >>** button.

64. **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.
65. 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.
66. 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.

67. The Employment Type will help to identify which of the Compensation Information fields need to be filled out.

**Note:** If you are entering the Compensation Rate, leave the Step field blank.

68. The Compensation Rate for Academic Staff is an annual amount entered into the **Compensation Rate: Required** field.

In this example, Enter "148000" into the **Compensation Rate** field.

69. The system will validate the amount entered.

**Note:** If you have entered a compensation rate that is not within the parameters setup within the system, a message will appear indicating what the parameters are. You will be taken back to the Compensation Rate field to enter a new amount.
70. **Retro Pay Required Option**

This option is automatically 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.

71. **Contingent Option**

This option is used for Academic Staff Hires only when the fund source is contingent.
72. The **Compensation Distribution** section is used to specify how the person's salary and benefits are to be distributed within finance.

   This section MUST be filled out.

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

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

   In this example, click the **001 [Regular Salary]** list item.

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

   Click the **Select Combo Code** button.
75. **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.

76. If you know the Combo Code, you can enter it in the **Combination Code** field. Otherwise, complete the fields within the **ChartField Detail** grid.

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

**Note:** Ensure that you enter all ChartField string details including the zeros.

78. Enter the Fund Code into the **Fund Code** field.

In this example, enter "210".
79. Enter the Department ID into the **Department** field.

In this example, enter "360710".

80. Enter the appropriate Program Code into the **Program Code** field. If there is no Program Code, enter "0". Do not leave this field blank.

In this example, enter "0".

81. Enter the appropriate Class Field into the **Class Field** field. If there is no Program Code, enter "0". Do not leave this field blank.

In this example, enter "0".

82. Once you have entered the Combo Code or the ChartField Details, Click the **Search** button.

83. The Combo Code matching your search criteria is provided.

Click the **Select** button.
84. You are returned to the **ChartField Detail** page. Click the **Ok** button.

85. The **Combo Code Fields** column automatically populates based on the combo code you selected.
86. 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.

87. **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.

88. **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.
89. **Stat Deduction Distribution Option**

This option refers to the 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.

90. **Hire with Supplemental Payment Option**

The Hire with Supplemental Payment option is used for payments in addition to salary.

Click the **Hire with Supplemental Payment** option.
91. After selecting the Hire with Supplemental Payment option two more areas become available.
   • One Time Supplemental Pay option
   • Supplemental Pay - Ongoing grid.

92. Click the **One time Supplemental Pay** option.

93. Both the Supplemental Pay - One Time Grid and the Supplemental Pay - Ongoing grid are shown.
94. **Supplemental Pay - Ongoing**

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

Click the button to the right of the **Pay Start Date** field.

95. **Select the Pay Start Date.**

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

96. **Click the button to the right of the Pay End Date field.**
97. Select the Pay End Date.

In this example, click **April 30, 2017**.

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

99. A list of valid Earnings Code is provided. Select the appropriate code.

In this example, click the **182 [Market Supp - Recruitment]** list item.

100. Enter the pay amount into the **Amount** field.

In this example, enter "**5000**".

101. Click the **Select Combo Code** button.
102. Enter either the Combo Code, ChartField Detail or Select the Speed Type option to find a valid combo code.

In this example, enter "000005725" into the **Combination Code** field.

![](image1.png)

103. **Click the Search button.**

![](image2.png)

104. Ensure that the ChartField information provided for the Combo code entered is correct.

**Click the Select button.**

![](image3.png)
105. Click the Ok button.

106. The **Combo Code Fields** column will auto populate with the ChartField string.

107. **One Time Supplemental Pay Option**

   This option is used if the employee is eligible for a Lump Sum supplemental pay. Follow the same steps as outlined for the Supplemental Pay - Ongoing option but use the Supplemental Pay - One Time grid.
108. In this example, the person is not eligible for One time Supplemental pay.

Since no information was entered into the Supplemental Pay - One Time grid, you can close this grid without further action.

If information was added to this grid, you need to remove the information from the fields before closing the grid to ensure the system does not keep the entered information.

Click the **One time Supplemental Pay** option.

109. The One time Supplemental Pay option is no longer checked and the Supplemental Pay - One Time grid no longer appears.

110. Click the **Next >>** button.
111. **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.

Click the button to the right of the **Direct Deposit Account Type** field.

112. Click the **Chequing** list item.

113. Enter the person’s Bank ID into the **Bank ID** field.

   In this example, enter “0001”.

114. Enter the person’s Bank Branch ID into the **Bank Branch ID** field.

   In this example, enter “263999”.

115. Enter the person’s Account Number into the **Account Number** field.

In this example, enter "8888999".

![Image of the account number field](image)

116. Click the **Next >>** button.

![Next button](image)

117. **Step 8: Enter Education Information**

On the Education page, enter the person’s Educational background.

Click the button to the right of the **Highest Education Level** field.

![Image of the highest education level field](image)

118. A list of valid education levels is provided. Select the Highest Level of education that applies to the person.

In this example, click the **3 [Masters Degree]** list item.
119. **The Education** section should contain ALL of the person’s Education information. This information is required for Stats Canada Reporting purposes.

120. Enter the year that the person completed the accomplishment into the **Year** field. When entering the year, the format must be yyyy. A two-digit year will cause the form to error when uploading into PeopleSoft HCM. In this example, enter "2000".

121. Click the button to the right of the **Accomplishment** field.

122. A list of valid accomplishments is provided. Select the applicable accomplishment. At the top of the list you can use the search feature to find the applicable Accomplishment. In this example, enter "M" into the **begins with** field.

123. Click the **Look Up** button.
124. The list will populate based on the search criteria entered.

In this example, all options beginning with an "M" in the Value column is provided.

Click the **MDCM [Med. Doctor, Master of Surgery]** list item.

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

126. A list of valid Country selections is provided. Select the Country that the person completed the accomplishment in.

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

127. Click the button to the right of the **Prov/State** field.

128. A list of valid provinces/states is provided based on the Country chosen. Select the province/state that the person received the accomplishment in.

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

129. Click the **School Code** button.

130. A list of valid codes for the different schools is provided. Find and select the appropriate school code.

**Note:** If the school you need is not on the list, contact Human Resource Services.

In this example, click the **S0071 [U of Alberta]** list item.
131. Use the "+" to add more lines. Continue to add lines until ALL the Education for the person has been entered.

132. The **Work Experience** section is used to record the person's last employer before the U of A.
133. Click the button to the right of the **Start Date** field.

134. Select the Date the person started the past job.

   In this example, click **January 15, 2001**.

135. Click the button to the right of the **End Date** field.

136. Select the Date the person ended employment for the job.

   In this example, click **April 14, 2017**.
137. Enter the Employer Name into the **Employer** field.

   In this example, enter "**University of Alberta**".

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

139. A list of valid Countries is provided. Select the applicable Country value.

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

140. Click the button to the right of the **Prov/State** field.

141. A list of valid province/state values based on the Country selected is provided.

   Select the appropriate province/state value.

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

142. Use the "+" to add more lines to record additional work experience if required.
143. The **Previous Employment** section is used to record the Employment Type as related to the data entered in the Work Experience section.

![Image of the Human Capital Management interface showing Previous Employment section]

144. Enter the current year into the **Rpt Year** field.
   
   For this example, enter "1999".

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

146. A list of valid Employment Types is provided. Select the applicable Employment type value.
   
   In this example, click the 06 [Hospital Clinic Employment] list item.

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

148. A list of valid Countries is provided. Select the applicable Country value.
   
   In this example, click the CAN [Canada] option.
149. Click the button to the right of the **Prov/State** field.

150. A list of valid province/state values based on the Country selected is provided. Select the appropriate province/state value.

In this example, click the **AB [Alberta]** option.

151. Use the "+" to add more lines to match the lines entered in the Work Experience section.

152. Click the **Next >>** button.

153. **Step 9: 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.
154. The **Distribution List** field is used to specify which email distribution list the person should be added to.

Click the button to the right of the **Distribution List** field.

![Distribution List](image)

155. A list of available distribution lists is provided. Select the list that best fits the person as you can only select one.

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

![Delegate List](image)

156. In the **Probation Type** field, select the type of probation the person is applicable for.

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

![Probation Type](image)

157. A list of valid probation types is provided. Select the applicable probation type.

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

![Probation List](image)
158. Click the button to the right of the **Probation Date** field.

159. Select the date that the person's Probation will end.

In this example, click the **April 15, 2019**.

160. **Working Outside of Province Option**

   This option is checked when the employee’s home address is local but they are working in a different province.
161. The **Relocate on Hire** option should be marked if the U of A is responsible for coordinating and paying for the person's relocation move, under the relocation policy.
162. The **UA Employee Data** section is used to record the person’s **Tenure Date** and **Sabbatical Credit** amount if the person is eligible for either.

163. Click the **Next >>** button.

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

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

165. 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.
166. The **File Attachments** section provides you the opportunity to add attachments to the eForm. Refer to the 'Adding Attachments to eForms' topic for further details.

167. 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.
168. 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.

169. Click the **Expand Comments section** button.
170. 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.

In this example, enter "**Academic Hire**" into the **Comments** field.

171. **Note:** Ensure you enter complete information before leaving the comments section.

The system assumes that when you leave the comments section you have finished the entry and saves it as a single transaction. When you go back into the comments section, the system treats it as an entirely new entry.
172. 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.

173. Click the **Submit** button.

174. The **Finalized** page provides the approval workflow and the stage that the form is at.
175. Within the **Stage** boxes, a link is provided to display either the name of the Approver or "Multiple Approvers" for that stage.

176. Congratulations! You have completed the training on Creating a Hire eForm for Academic Staff.

**End of Procedure.**