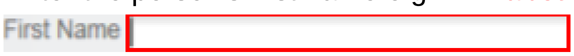
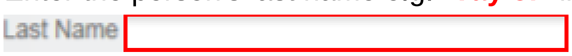
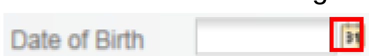
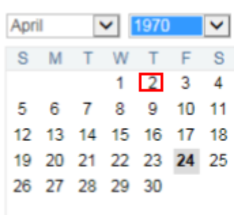
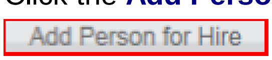
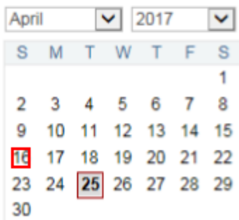
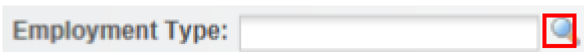
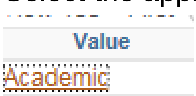
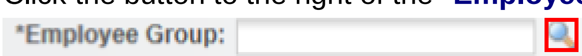
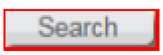
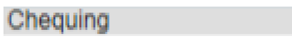
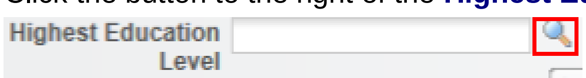
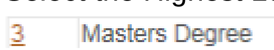
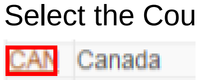
Creating a Hire eForm for Academic Staff

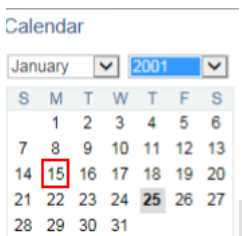
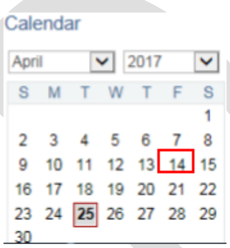
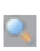
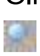
Step	Action
1.	Once you have navigated to PeopleSoft HCM, click the **Main Menu** button. 
2.	Click the **UofA eForms WorkCenter** menu. 
3.	Click the **Add an eForm** link. 
4.	**Step 1**: **Conduct a search to confirm if the person has an existing Person ID.**
5.	Enter the person's first name e.g. "**Elizabeth**"into the **First Name** field. 
6.	Enter the person's last name e.g. "**Taylor**" into the **Last Name** field. 
7.	Click the button to the right of the **Date** field. 
8.	Select the Month, Year and Day of the person's birthday. 
9.	Click the **Search** button. 
10.	**Step 2: Add Person for Hire** Click the **Add Person for Hire** button. 
11.	**Step 3: Enter the Person's Personal Information.** Enter data into the relevant fields on the Hire Personal page

Step	Action
12.	Enter a valid value e.g. "**999999998**" into the **Social Insurance #** field. *Social Insurance #:
13.	Click the button to the right of the ***Citizenship Country** field. *Citizenship Country:
14.	Select the appropriate Country. CAN Canada
15.	Click the button to the right of the ***Citizenship Status** field. *Citizenship Status:
16.	Select the appropriate Citizenship Status. Value C
17.	Click the button to the right of the ***Country** field. *Country:
18.	Select the appropriate Country. CAN Canada
19.	Enter the person's Home Address into the ***Address 1** field. *Address 1:
20.	Enter the person's home City into the **City** field. *City:
21.	Enter the Province into the ***Prov** field. *Prov:
22.	Enter the person's Postal Code with a space as the separator, into the ***Postal:** field. *Postal:
23.	Enter the person's Home Phone Number, without any spaces or separations, into the **Home Phone** field. Home Phone:
24.	Click the **Next >>** button. Next
25.	**Step 4: Enter Basic Job Information**

Step	Action
26.	Click the button to the right of the ***Effective Date** field. 
27.	Select the person's date of employment e.g. **April 16, 2017**. 
28.	Click the button to the right of the ***Employment Type:** field. 
29.	Select the appropriate Employment Type. 
30.	Click the button to the right of the **Employment Subtype** field. 
31.	Select the appropriate Subtype. 
32.	Click the button to the right of the ***Employee Group:** field. 
33.	Select the appropriate Employee Group. 
34.	**Step 5: <u>Enter Job Information</u>**
35.	Enter the Position Number for the person into the **Position Number** field. 
36.	To override the defaulted information, click the **Override Position Data** option. 
37.	Click the **Next >>** button. 
38.	**Step 6: <u>Enter Compensation Information</u>**

Step	Action
39.	Enter either the Step into the Step field or the Compensation Rate amount e.g. "**148000**" into the **Compensation Rate** field. 
40.	In the Compensation Distribution section, click the button to the right of the **Earnings Code** field. 
41.	Select the appropriate Earnings Code. 
42.	Click the **Select Combo Code** button. 
43.	If you know the Combo Code, you can enter it in the **Combination Code** field. Otherwise, complete the fields within the **ChartField Detail** grid.
44.	Click the **Search** button. 
45.	Click the **Select** button. 
46.	Click the **Ok** button. 
47.	Enter the percentage you would like allocated to the combo code selected e.g. "**100**" into the **Percent of Distribution** field
48.	**Supplemental Pay - Ongoing** If the employee is eligible for Ongoing Supplemental Pay the Supplemental Pay - Ongoing grid needs to be filled out.
49.	**One Time Supplemental Pay Option** Follow the same steps as outlined for the Supplemental Pay - Ongoing option but use the Supplemental Pay - One Time grid.
50.	Click the **Next >>** button. 

Step	Action
51.	**Step 7: <u>Direct Deposit Bank Information (Optional)</u>** You may enter the Direct Deposit information on this page if it is available. Otherwise, you can skip to the next page. Click the button to the right of the **Direct Deposit Account Type** field. 
52.	Click the **Chequing** list item. 
53.	Enter the person's Bank ID into the **Bank ID** field. In this example, enter "**0001**". 
54.	Enter the person's Bank Branch ID into the **Bank Branch ID** field. 
55.	Enter the person's Account Number into the **Account Number** field. 
56.	Click the **Next >>** button. 
57.	**Step 8: <u>Enter Education Information</u>** Click the button to the right of the **Highest Education Level** field. 
58.	Select the Highest Level of education that applies to the person. 
59.	Enter the year that the person completed the accomplishment into the **Year** field.
60.	Click the button to the right of the **Accomplishment** field. 
61.	Select the applicable accomplishment.
62.	Click the button to the right of the **Country** field.
63.	Select the Country that the person completed the accomplishment in. 

Step	Action
64.	Click the button to the right of the **Prov/State** field. 
65.	Select the province/state that the person received the accomplishment in. AB Alberta
66.	Click the **School Code** button. 
67.	Find and select the appropriate school code. S0071 U of Alberta
68.	In the Work Experience section, click the button to the right of the **Start Date** field. 
69.	Select the Date the person started the past job. 
70.	Click the button to the right of the **End Date** field. 
71.	Select the Date the person ended employment for the job. 
72.	Enter the Employer Name into the **Employer** field.
73.	Click the button to the right of the **Country** field. 
74.	Select the applicable Country value. CAN Canada
75.	Click the button to the right of the **Prov/State** field. 

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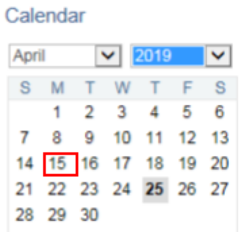
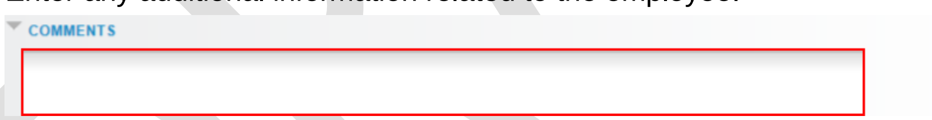
76.	Select the appropriate province/state value. AB Alberta
77.	In the **Previous Employment** section Enter the current year into the **Rpt Year** field.
78.	Click the button to the right of the **Employment Type** field.
79.	Select the applicable Employment type value. 06 Hospital Clinic Employment
80.	Click the button to the right of the **Country** field.
81.	Select the applicable Country value. CAN Canada
82.	Click the button to the right of the **Prov/State** field.
83.	Select the appropriate province/state value. AB Alberta
84.	Click the **Next >>** button. Next
85.	**Step 9: <u>Enter UofA Specific Information</u>**
86.	Click the button to the right of the **Distribution List** field. Distribution List:
87.	Select the list that best fits the person as you can only select one. Delegate
88.	Click the button to the right of the **Probation Type** field. *Probation Type:
89.	Select the applicable probation type. Probation
90.	Click the button to the right of the **Probation Date** field. Probation Date:

Step	Action
91.	Select the date that the person's Probation will end. 
92.	Click the **Next >>** button. 
93.	**Step 10: Submit eForm for Approval**
94.	Ensure the appropriate Action/Reason information is correct.
95.	Attach all of the required documentation related to the type of form being submitted.
96.	Click the **SIN Verification** option. 
97.	Click the **Expand Comments section** button. 
98.	Enter any additional information related to the employee. 
99.	Click the **Submit** button. 
100.	**End of Procedure.**