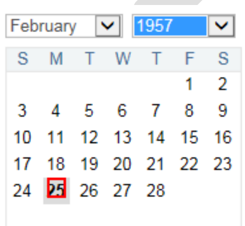
Creating a Hire eForm for Support Staff

Step	Action
1.	Once you have navigated to PeopleSoft HCM, click the **Main Menu** button. Main Menu
2.	Click the **UofA eForms WorkCenter** menu. UofA eForms WorkCenter
3.	Click the **Add an eForm** link. Add an eForm
4.	**Step 1: <u>Conduct a search to confirm if the person has an existing Person ID</u>**
5.	Enter the person's first name e.g. "**Diane**" into the **First Name** field. First Name
6.	Enter the person's last name e.g. "**Smith**" into the **Last Name** field. Last Name
7.	Click the button to the right of the **Date of Birth** field. Date of Birth
8.	Select the Month, Year and Day of the person's birthday. 
9.	Click the **Search** button. Search
10.	**Step 2: <u>Add Person for Hire</u>** Click the **Add Person for Hire** button. Add Person for Hire
11.	**Step 3: <u>Enter the Person's Personal Information.</u>** Enter data into the relevant fields on the Hire Personal page.
12.	If the default 999999999 displays in the ***Social Insurance #** field, update the field with the correct SIN, if available. *Social Insurance #:

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13.	Click the button to the right of the ***Citizenship Country** field. *Citizenship Country:
14.	Select the appropriate Citizenship Country.
15.	Click the button to the right of the ***Citizenship Status** field. *Citizenship Status:
16.	Select the appropriate Citizenship Status.
17.	Click the button to the right of the ***Country** field. *Country:
18.	Select the appropriate Country.
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.	Click the button to the right of the ***Prov** field. *Prov:
22.	Select the appropriate Province.
23.	Enter the Postal Code with a space as the separator, into the **Postal: Required** field. *Postal:
24.	Enter the person's Home Phone Number, without any spaces or separations, into the **Home Phone** field. Home Phone:
25.	Click the **Next >>** button. Next
26.	**Step 4: <u>Enter Basic Job Information</u>**
27.	Click the button to the right of the ***Effective Date** field. *Effective Date:

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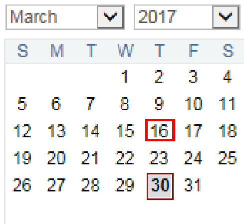
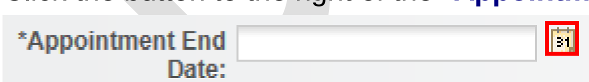
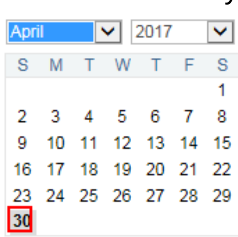
28.	Select the person's date of employment. 
29.	Click the button to the right of the **Employment Type** field. 
30.	Select the appropriate Employment Type.
31.	Click the button to the right of the **Employment Subtype** field. 
32.	Select the appropriate subtype.
33.	Click the button to the right of the ***Employee Group** field. 
34.	Select the appropriate Employee Group.
35.	**Step 5: <u>Enter Job Information</u>**
36.	Enter the Job Code, if known, into the ***Job Code** field. Otherwise use the look up feature. 
37.	Enter the 6 digit Department Number e.g. "**360700**" into the **Department: Required** field. 
38.	Click the button to the right of the ***Appointment End Date** field. 
39.	Select the last day the person will work. 

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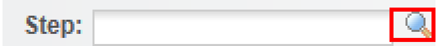
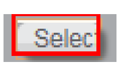
40.	Enter the **Reports To** ID (Position Number of Supervisor). If you do not have a position number enter the **Supervisor ID** (Employee ID of the Supervisor).
41.	Click the **Next >>** button. 
42.	**Step 6: <u>Enter Compensation Information</u>**
43.	To select the appropriate Step, click the button to the right of the **Step** field. 
44.	Select the appropriate Step.
45.	Click the button to the right of the **Earnings Code** field. 
46.	Select the appropriate Earnings Code.
47.	Click the **Select Combo Code** button. 
48.	Search using the Combo Code field or enter the Chartfield information into the grid provided.
49.	Click the **Search** button. 
50.	Click the **Select** button. 
51.	Click the **Ok** button. 
52.	Scroll to the right and enter the percentage you would like allocated to the combo code selected. Enter the percentage to be allocated to the combo code selected e.g. "**100**" into the **Percent of Distribution** field.
53.	Select the Override Benefits Distribution Option, if required.

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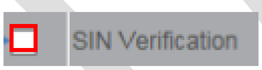
54.	Select the Stat Deduction Distribution Option, if required.
55.	Click the **Next >>** button. 
56.	**Step 7: <u>Direct Deposit Bank Information (Optional)</u>**
57.	Click the **Next >>** button. 
58.	**Step 8: <u>Enter UofA Specific Information</u>**
59.	Click the button to the right of the ***Probation Type** field. 
60.	Select the appropriate probation type. 
61.	Click the **Next >>** button. 
62.	**Step 9: <u>Submit eForm for Approval</u>**
63.	Ensure the appropriate Action/Reason information is correct.
64.	Add the applicable attachments to the eForm.
65.	Click the **SIN Verification** option. 
66.	Use the Comments section to include any additional setup requirements and employee related information that has not been captured in the eform.
67.	Click the **Submit** button. 
68.	**End of Procedure.**