Schulich Temp Full Time Contract Extension Procedures

Version 3.3

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Schulich Staff Contract Extension: Standard Operating Procedures

Overview

This document has been designed for Managers and Schulich Human Resources and all other staff involved in the hiring process. The document outlines the steps involved in requesting permission to extend an existing staff member's employment contract.

How this guide is organized

This guide provides information about each step in the process. Where the step requires that Schulich Human Resources (HR) or a Hiring Manager take action, the action is written out step by step. Where the action is taken by Western Human Resources, an overview of the task is provided.

All tasks related to the <mark>Hiring Manager are highlighted Yellow</mark> and all tasks related to <mark>Schulich Human Resources are highlighted Green</mark>. This will allow you to scan the table of contents for the actions relevant to your role.

Some steps require using the Schulich Administrative System (SAS), OneForm. When OneForm is used in the process, you will need to reference the *Help Documentation* within SAS as those details are not contained in this guide.

The table of contents provides the step number and title of each action involved in the Contract Extension process, designed through a collaborative process involving Hiring Managers, Schulich Human Resources, and the Schulich School of Medicine & Dentistry Project Management Office. You can use the table of contents as your 'Quick Guide', or look within the guide for the details of each step involved.

If you notice any errors, omissions, or points of confusion please contact Schulich Human Resources via email at OneForm.Feedback@schulich.uwo.ca.

RFH Initial Request

Overview

The first step in requesting approval to extend a current contract is the completion of the Request for Hire form (RFH). Both the RFH and Staff Appointment Notice (SAN) are now referred to as the OneForm in the Schulich Administration Systems (SAS).

1.0 Need Identified by <mark>Hiring Manager</mark> OneForm RFH completed

Refer to your OneForm training for specific details about completing the form, however when you complete the OneForm you will need the information listed below:

- Job Status (TF)
- Job Title
- Job Description
- Hours (number to work each week)
- Vacation Pay (4% is the Employment Standards Act standard)
- Position Funding (grant, operating, or operating/tithe) If the position is grant funded, a waiver, indicating that funding is available to cover all of the position expenses, must be signed and attached to the RFH.
- Rationale in bottom comment area (explanation for hiring, i.e. Grant funding for project ' X'.)
  - o this area must include if position had budget, how position will add to the mission of the school, what project is this for if grant funded, Grant details, length of funding available for the position within the grant, impact / risk of not filling position
- Hiring Level (PMA/UWOSA),
- Job Code
- Est. Start Date (and term date for contract)
- Action Code (https://www.uwo.ca//hr/admin/form_doc/references/action_reason_tbl.pdf)
- Reason Code.

Note: As soon as the RFH is created, a Tracking number is generated. This number is used for tracking and reference during the New Hire process.

If you do not have approval permission for your department/ unit, the form will be routed to the unit approver before being submitted to Schulich Human Resources. If sent to unit approver, the form may be rejected if more

information is needed. In this case, the person completing the form revises it and escalates it to the Manager again.

	Step	Description	Result
Hiring Manager submits RFH		After inputting the information into the RFH in OneForm, the Manager submits the form. The table below shows what occurs to the form upon submission:	
	Step	**Description**	**Result**

	1	OneForm RFH is submitted, via submit button
		• Scan and attach *Grant Funding Waiver* to the RFH, if the position is Grant Funded(the attaching of the waiver is mandatory – if it is not attached, the system will not allow you to continue with your submission)
			• email is sent to the next person in the process automatically,
			• RFH is submitted to the next level within SAS, either to:
			  1. Dept. manager if his/her approval is required, and then to
			  2. Schulich HR.
			
			• NOTE: The form status will indicate whether the form was submitted for Dept. or Schulich HR approval.

1.1 Schulich HR verifies info

Schulich HR verifies the RFH information.

If the request...	Then ...
is complete	request submitted to Schulich Dean's Office approver for approval.
needs revisions	Schulich HR 'refuses' the RFH, this triggers the form to be routed back to the Hiring Manager so that necessary changes can be made.

1.2 Schulich HR preps RHF's for Dean's Office approval

Schulich HR sends RFH's to the Dean's Office approver for approval.

Step	Action
1.	Press Submit in OneForm to send RFH's to the Dean's Office approver.
2.	Setup meeting with the Dean's Office approver to review submitted RFH's.

2.0 Dean's Office approver reviews RFH

The Dean's Office must approve all RFH's prior to the requests being routed to Western Staff Relations.

If the Dean's Office approver...	Then the Dean's Office approver...
Approves the request	Press *Approve* in OneForm
Approval is denied	Either: **Allows re-submission:** • **Refuse** the OneForm RFH • Add comments to email, OR **Refuse and closes** • **Refuse and Closes** the RFH and − Instructs Schulich HR to close the request − Add comments to email This ends the process and prevents re-submission.

2.1 Schulich final approver sends RFH to Western HR

If the RFH is met with approval, the Schulich Dean's Office Final Approver sends the request to Western Staff Relations.

The Dean's Office Final Approver follows the steps in the table below:

Step	Action
1.	Press Approve in OneForm • Confirm that you want to Approve
2.	Press Email in OneForm. • Select Email RFH (Form and Spreadsheet) Excel Spreadsheet and RFH in PDF format are generated
3.	Press Send

	Schulich Dean's Office Final Approver sends email to Western Staff Relations and OneForm attaches both documents to the email.

Provost Reviews RFH's	Western Staff Relations forwards all RFH's to the Provost. • The Provost reviews each application and • Decides to approve or decline the request, • Provost forwards the decision back to Western Staff Relations.
2.2 - 2.3 Western HR sends RFH decision	Western Staff Relations sends an email to Schulich HR indicating whether the RFH was approved or not by the Provost.
3.0 Schulich HR sends RHF hiring approval to Hiring Manager	When approved, Schulich HR changes status of RFH based on the decision received from Provost. Schulich HR will change the form style to a SAN, and an email is generated to notify the Hiring Manager of the status.
3.1 Schulich HR action when Provost declines request	Schulich HR has two options when the Provost declines an RFH: **Option #1:** **Change status** of the RFH in OneForm to, 'RFH Refused", − Guidance can be provided to the Hiring Manager to increase the potential success of the re-submission Or **Option #2:** **Refuse and Close** the RFH, preventing re-submission, • Generates an email to the Hiring Manager, − add comments in the email explaining why the RFH was refused and closed − Process ends here.
4.0 Hiring Manager receives approval	The Hiring Manager receives the RFH approval via email and moves to *Step 5*.

4.1 <mark>Hiring Manager</mark> receives refusal message

When the Hiring Manager receives an email stating that the RFH was 'Refused ' follow the steps outlined below :

If the comments in the email state that...	Then ...
Re-submission of the RFH is suggested	- Open up the RFH, - Add additional details to the Rationale field to strengthen the submission. i.e. additional details such as the impact of not filling the role on the Faculty or School, funding opportunities that may be possible since the RFH was created, etc.
The RFH has been refused and closed	No further action is required.

Making an Offer

5.0 <mark>Hiring Manager</mark> & Supervisor if appropriate, verify the terms of employment for incumbent	The Hiring Manager & Supervisor, if appropriate, discuss and determine the terms of employment for the incumbent and what, if any changes are to be made. Items discussed include:
	↳ Salary – this must be within the appropriate range,
	    o UWOSA roles must adhere to the Collective Agreement
	    o PMA roles must follow the PMA Guidelines
	↳ Vacation 4% or time off in lieu,
	↳ Start date (will be day after current contract ends),
	↳ Hours per week.
	
	Hiring Manager documents the offer agreed upon.

6.0 <mark>Hiring Manager</mark> makes verbal offer to candidate	Hiring Manager discusses the contract extension with the incumbent. During the discussion the Hiring Manager provides details about: • End date • Salary • Vacation The candidate may agree immediately, or take 24 or 48 hours to consider the offer. The Hiring Manager changes the OneForm status to 'Verbal Offer Extended'.
7.0 Candidate accepts verbal offer	The candidate verbally accepts the offer. The Hiring Manager changes the OneForm status to 'Verbal Offer Accepted'. If candidate does not accept offer, then Hiring Manager commences Request for Hire, if he/she feels that the position still needs to be filled.
8.0 <mark>Hiring Manager</mark> drafts Contract Extension Letter	The Hiring Manager drafts and signs the contract extension letter using the template from the SSMD website. (www.schulich.uwo.ca/humanresources/stafftemplateletters) The Hiring Manager changes the OneForm status to 'Offer Letter Sent'.
9.0 <mark>Hiring Manager</mark> gives	The employee is given the contract extension offer letter. The employee signs and returns the letter to Hiring Manager.

Contract Extension letter to Employee

9.1 <mark>Hiring Manager</mark> **Uploads Signed Contract Extension letter to OneForm**

The Hiring Manager uploads the signed contract extension letter into OneForm andupdates the OneForm status to 'Offer Letter Received'.
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- If the candidate has a 900-series SIN, a Work Permit must be attached to the record in OneForm.

9.2 <mark>Hiring Manager</mark> **completes SAN in OneForm**

The Hiring Manager enters all required information into the SAN.

The Hiring Manager changes the OneForm status to 'Applicant Information Completed'.

9.3 <mark>Hiring Manager</mark> **sends SAN and offer letter to Schulich HR**

The Hiring Manager clicks 'Submit' to send the SAN and offer letter to Schulich HR.

Updating the Staff Information

10.0 <mark>Schulich HR</mark> Coordinator reviews and verifies information	The Schulich HR Coordinator reviews finalized letter and the SAN. Email is automatically generated and sent to Hiring Manager.

If the SAN & offer letter...	Then ...
are complete	documents are sent tofinal Schulich HR approver.
needs revisions	Schulich HR coordinator 'refuses' the OneForm. This triggers the form to be sent back to the Hiring Manager so he/she can make the necessary changes.

10.1<mark>Schulich HR</mark> Coordinator sends SAN and offer letter for final Schulich HR approval

The Schulich HR Coordinator sends SAN and offer letter to final Schulich HR approver by clicking 'Submit'; the form status will change to 'Submitted for Schulich Approval'.

10.2 Final <mark>Schulich HR</mark> approver reviews and approves SAN and offer letter

Final Schulich HR approver reviews the SAN and offer letter and approves; the form status will change to 'SAN and Offer Letter Approved by Schulich'.

10.3<mark>Schulich HR</mark> final approversend docs to Western HR

Fully completed SAN output and contract extension letter are sent to Western Payroll through secure file transfer.
- The documents are sent via email
- The status of OneForm is changed to 'SAN and Offer Letter Sent to Corporate'.

11.0 Western HR updates PeopleSoft

Input of SAN by Western HR updates all corporate records.

12.0 <mark>Schulich HR</mark> downloads EE info from PeopleSoft HR

Once info is updated, Schulich HR downloads employee information from PeopleSoft HR. PeopleSoft automatically matches the info to the OneForm and it updates the record in the Schulich Administrative System (SAS).

13.0 <mark>Schulich HR</mark> updates OneForm

Schulich HR updates the status in OneForm to 'Hiring Activity Complete & File Closed'.

Technical Feature Support

OneForm Help Page

Users requiring more information on the technical features of OneForm are directed to the Help page, which is accessible within any open record in OneForm.

The Help page will assist you with navigating through OneForm, and contains step-by-step instructions which pertain to the use of the form only, and not the policies and procedures of the hiring process.

The Help Page defines the fields in the RFH and SAN form styles, outlines how to add attachments, how to submit for approval, approving/refusing the RFH/SAN, copying records, sharing/editing records within work groups, secure hires, and delegating signing authority.

Change Log

Version 3.1 February 7, 2014	Step 2.1 – RFH outputs now generated and sent by Schulich Dean's Office Final Approver. Step 9.1 – Clarification of work permit requirement for individuals with 900-series SINs Step 10.3 – SAN outputs now generated and sent to Corporate HR by Schulich HR Final Approver
Version 3.2 April 8, 2014	Addition of Technical Feature Support information
Version 3.3 October 15, 2014	Addition of Technical Feature Support information Step 10.3 – through secure file transfer