Ontario Tech University – Docusign
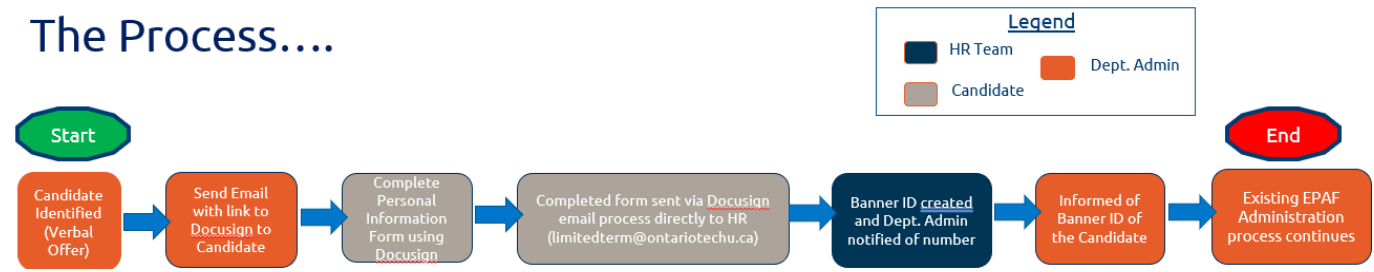## Administrative Support Job Aid

Process workflow

Purpose

This new secure and confidential process is to enhance security when obtaining a new hire's personal information. This job aid will provide you with a quick step by step on how to efficiently connect with your successful candidates.

STEP ONE: Once your new hire has verbally accepted the offer to the vacant position. Please send the **following email** to request the personal information that is required to create the Banner ID.

Subject: Personal Information Required

Dear [Recipient's Name]

Congratulations on your verbal acceptance of the position of [########] within the Department/Faculty of [########].

The next step of our hiring process is to provide you with a written offer of employment.

You will be required to complete the following personal information form in advance of receiving the final contract. This secure link will help to facilitate the collection of this pre-employment data.

If you are in possession of a valid work permit, please ensure that you have submitted a copy to limitedterm@ontariotechu.ca. This information is necessary to confirm eligibility to work in Canada.

Your information will only be used for administrative purposes, to create your unique Banner ID and employee profile within our HR system.

Upon receipt of this information our Human Resources Team **will ensure confidentiality.**

Please copy the information below into the 'contract information section' of the secure document

Position Title: [New Hire Position Title]

Manager Name: [Hiring Manager's Name]

Faculty/Unit Administrator: [Supporting Faculty/Unit Admin – EPAF creator]

Requisition ID (if applicable): [3-digit Req ID]

STEP TWO: Once the successful new hire has clicked on the link provided in the email below

You will be required to complete the following personal information form in advance of receiving the final contract. This secure link will help to facilitate the collection of this pre-employment data.

They will be directed to the screen below, which provides an explanation of the requirements and how the information will be utilized.

OntarioTech
UNIVERSITY

Welcome

Personal Information Form

Your information will only be used for administrative purposes, to create your unique employee ID (Banner ID) and employee profile within our Human Resources (HR) system.

Notice of Collection: This form is for the collection of personal information.

Personal information provided to Ontario Tech University through Docusign is collected under the authority of the University of Ontario Institute of Technology Act, SO 2002, c. 8, Sch. O. and will be collected, protected, used, disclosed, and retained in compliance with Ontario's Freedom of Information and Protection of Privacy Act R.S.O. 1990, c. F.31. This information will be used for statistical and program improvement purposes, as well as to create a unique Banner ID and employee profile within our Human Resources Information System and, if applicable, to administer employment and for communication on an ongoing basis. Questions regarding the collection of your personal information may be directed to: Ontario Tech University Human Resources, 2000 Simcoe Street North, Oshawa, ON L1H 7K4, 905-721-8668, email: HRrecruitment@ontariotechu.ca

Start

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STEP THREE: Your new hire will complete the form with their personal information and hiring details, as outlined in your initial email

New Hire email *

Legal First name *
New Hire Legal First name

Legal Lastname *
New Hire Legal Lastname

Preferred First Name *

Banner ID
Banner ID (if available)

Date of Birth *
Please format as dd/mm/yyyy

dd/mm/yyyy ☐

Legal Sex *
Legal Sex (Male or Female)

-- Select -- ▼

Social Insurance Number (SIN) *
Social Insurance Number (SIN)

Work Visa Expiry Date
Work Visa Expiry Date (if applicable)

dd/mm/yyyy ☐

Telephone Number *

Full Address *
Full Address (including province & postal code)

Finish Later | Back | **Next**

33% completed

Contract Information

Position Title *

Manager Name *

Faculty/Department Administrator Name *

Requisition ID
Requisition ID (if known)

Finish Later | Back | **Next**

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STEP FOUR: The new hire will have the opportunity to review all the information entered into the form before finalizing and submitting it

STEP FIVE: The new hire will need to check the box below in order to move forward with sign-off.

Please Review & Act on These Documents

OntarioTech eSignature
Ontario Tech University

Please read the Electronic Record and Signature Disclosure.
☐ I agree to use electronic records and signatures.

Please Review & Act on These Documents

OntarioTech eSignature
Ontario Tech University

Please read the Electronic Record and Signature Disclosure.
☑ I agree to use electronic records and signatures.

CONTINUE

STEP SIX:

The new hire should **review the information**, make any necessary changes, then scroll to the bottom of the page and click the 'Sign' box.

Contract Information	
Position Title	HR Recruiter
Manager Name	Current Manager
Faculty/Department Administrator Name	HR
Requisition ID (if known)	1008
Signature	Sign ↓
Date	11-Sep-2024

STEP SEVEN: The new hire should enter their signature in the box below

"Adopt & Sign"

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*

EM

Initials*

E

SELECT STYLE   DRAW   UPLOAD

PREVIEW   Change Style

Signed by: Initial

EM   E

E893F72BBA72499...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.

ADOPT AND SIGN   CANCEL

STEP EIGHT: Click Finish to submit

Ready to Finish?
You've completed the required fields. Review your work, then select **FINISH**.

FINISH

New hire personal information form has successfully been submitted.

Thank you
We've received your form.

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All Faculty/Unit Administrators will be provided with the below email from Limited Term, when the banner ID is created with a **regular SIN (Canadian Citizen/Permanent Resident)**

The blue hi-lighted fields will be updated accordingly for each email.

Subject: Limited-Term Employment Contract Process – Banner ID created

Dear [Recipient's Name],

We have created the banner record for your new hire [insert new hire name] the Banner ID is [#########].

Please proceed in creating the appropriate employment contract within our EPAF system.

All supporting payroll documents, including voided cheques, and completed TD1 forms, should be forwarded to payroll@ontariotechu.ca

Kind Regards,

Human Resources
limitedterm@ontariotechu.ca

If a Banner ID is created with a **SIN number beginning with a "9,"** the supporting Faculty/Unit administrator will need to ensure that a copy of the incumbent's work permit is requested.
This step is necessary to comply with work authorization requirements as set by Immigration Canada.

Subject: Employment Contract Process - Work Permit Required

Dear [Recipient's Name],

We have successfully created the banner record for your new hire, [Employee Name]. The Banner ID is [#########].

Before proceeding with the creation of the employment contract, please ensure that [Employee Name] provides a copy of a valid work permit for review. The work permit can be sent to HRrecruitment@ontariotechu.ca

Once we have received the work permit, you can proceed with creating the appropriate employment contract within our EPAF system.

If you have any questions, feel free to reach out.

Best regards,

Human Resources
limitedterm@ontariotechu.ca

Exemption – Incumbents who may receive a work permit at border services, please contact your Recruitment Specialist for further guidance.