**HR Front End Transaction – Academic Professional Transfer**

**(Initiated by the Hiring Unit)**

***Overview***

Transaction type: Request Access, Add a Job, Job End Date, and Employee Data Change.

Routing: Hiring Org Initiate, Request Access, Hiring Org Review, Home Org Review, College Review,

Campus Apply

Documents to attach:

Background Clearance Check email if required (required unless person has had Background Check within the past 2 yrs)

 To be attached by Home Org due to ending current job(s)

o Letter of resignation or other relevant documents

 To be attached by the new Org due to adding job(s)

o OEOA

o Offer/Accept letter

o PAPE

o Hiring Request form

o CV if total salary over $90,000 & title appears on BOT approval guidelines

o Provost Approval if salary is over $90,000

***HR Front End Detailed Steps***

1. *Hiring Unit* searches for employee and opens **Limited Employee Record View**.

2. Click **Request Access**

3. Select **Initiate** Level of Access.

4. Confirm that **Add a Job** is selected for transaction type.

5. Enter a Comment for the Home ORG that includes contact email & phone number, and click

**Submit**.

6. *Home Unit****:*** locates request access transaction in the **Group Inbox**. Open transaction and **Take**

**Ownership.**

7. Select **Yes** for approved.

8. Enter comment including contact email & phone number and click **Submit**.

9. Click **Cancel/Done** to exit screen.

10. *Hiring Unit:* locate request access transaction in **My Inbox**. Open the transaction.

11. Select **Transactions**»**Add a Job**.

12. On the Employee Class screen

a. Choose **Employee Group** *B‐Academic Professionals*.

b. Verify the answer to the Visa question.

c. Type the **Total % Employed** for the entire person using whole numbers between 0 and

100. Press **Tab**.

d. Select the appropriate length for the academic contract (usually *Greater than or equal*

*to 9 months*).

8/11/09

e. If contract is 9 months or greater, select **Pay Basis** *12/12* (typically used for A/P jobs). If

appropriate choose *10/12* or *9/12* instead.

f. If contract is less than 9 months type **Service Begin** and **Service End Dates** (not typical

for A/P jobs).

g. Click **Continue**.

13. On the **Job Dates** screen:

a. Verify that the **Job Employee Class** is correct.

b. Type a **Job Begin Date**. This must be after the end date added to the employee’s

existing job(s).

c. Type a **Job End Date** if required or if known.

d. Click **Continue**.

14. Type a position number, or search for a position by chart and org and highlight the desired

position. If no position number is available to be re‐used you can create a new position.

15. Click **Continue**.

16. On the **Position Data** screen verify, select, or type the following fields as needed: **Position Class**,

**Position Title** (use UPPERCASE letters only), **Position Employee Class**, **PAPE#**, **Budget Profile**,

**Budget Org**, **Position Labor Distribution**

17. Click **Continue**.

18. On the **Job Data** screen:

a. Type the **Job FTE** using decimal value from 0.01 to 1.00

b. Review the **Annual** rate. If the job is 9/12 all three rate fields auto‐complete based on

the **Job Begin Date**.

c. Verify the **Job Title** and **Job Employee Class**.

d. **Job Change Reason** defaults to *JB001‐Add Job*. If necessary choose a different reason.

e. Verify the **Job Labor Distribution**:

i. If a change is needed to existing values click on that field, overwrite the

numbers, and click **Update** to the right of the LD row. Note: You must click

**Update** next to each LD row for which you change values.

ii. If an additional line is needed, use vertical blank fields below the LD row(s) to

enter data, click **Add LD**.

f. Type a **Job Comment** that includes contact email & phone number, and click **Add**

**Comment**. Note: Once the comment is added you cannot change or remove it.

g. Click **Continue**.

19. If necessary, add attachment(s) as follows:

b. Click **Attachments** tab

c. Click **Add Attachment**

d. Click **Browse**, select document to attach (either on your hard drive or network drive).

e. Click **Open**

f. Click **Add**

g. Select **Document Type**, and type a **Description**.

h. Repeat as necessary for additional documents. Once all are listed, click **Upload**. Check

the message at the top of the screen to ensure that no error occurred.

i. Click **Done**.

20. You may change the **Doc Type** in **Employee Record View** by using the drop down box. You can

also edit the **Description**. Then click **Save Attachment**.

21. **Route** transaction. Hiring ORG will receive, review and route transaction.

8/11/09

22. *Home Unit:* Receives transaction in **Group Inbox**. **Take Ownership** and open the transaction.

23. Click **Add Change** in the ***Proposed Changes*** accordion to start the next component.

24. Set the **View** date:

a. If the job record currently has an end date, type the existing end date in the **View** date

field. Click **View**.

b. If the job has no existing end date, type the desired end date in the **View** date field.

Click **View**.

25. Select **Transactions** » **Job End Date**.

26. Click the job you want to end to expand the ***Job Detail*** if it is not already expanded.

27. Enter the desired end date in the **Job End Date** field and press **Tab**.

28. If the **Job End Date** entered is less than the previous end date, you may see a pop‐up message

informing you that the system is going to refresh the page to the end date entered. Click **OK**.

NOTE: If the end date entered is before the **Last Paid Date** the system automatically adjusts the

**Job End Date** and **Personnel Date** fields as necessary. Any pay adjustment transactions should

be processed outside of the HR Front End.

29. Select the proper **Job Change Reason** from the list (such as *EJ010* for Employee Job resignation).

30. Type a **Job Comment** that includes contact email & phone number, and click **Add**.

Note: Once the comment is added you cannot change or remove it.

31. Click **Save**. ***Proposed Changes*** accordion appears for the new Job End Date transaction.

32. If the job ended is 9/12 or 10/12 and the end date is anything other than 8/15, the system

generates a deferred pay (DP) job for pay owed to the employee. Calculate and enter remaining

pay owed for each DP job. If you are unfamiliar with this process contact your college for

assistance.

33. If you need to end another job for this person, click **Add Change** and repeat steps 3‐11.

34. If necessary, add attachment(s) as follows:

j. Click **Attachments** tab

k. Click **Add Attachment**

l. Click **Browse**, select document to attach (either on your hard drive or network drive).

m. Click **Open**

n. Click **Add**

o. Select **Document Type**, and type a **Description**.

p. Repeat as necessary for additional documents. Once all are listed, click **Upload**. Check

the message at the top of the screen to ensure that no error occurred.

q. Click **Done**.

r. You may change the **Doc Type** in **Employee Record View** by using the drop down box.

You can also edit the **Description**. Then click **Save Attachment**.

35. Click **Add Change** in the ***Proposed Changes*** accordion to start the next component.

36. Select **Transactions**»**Employee Data**.

37. Click once on the ***Employee General Information*** accordion to expand it if it is not already

expanded.

38. Under the Home Chart ORG Section, select the new **COA** and **Organization**.

39. Click **Save**.

8/11/09

40. Routing:

a. Review all changes again and click **Route**. Should get message success routing to Home

ORG Review.

b. Transaction appears in Home ORG reviewer **Group Inbox**. Org reviewer must **Take**

**Ownership**, review, and **Route**. Should get message Success routing to COLLEGE Review

stop. (If Org on job(s) ended is not the Home Org transaction goes to the Home Org first

before reaching the college.)

c. Transaction appears in COLLEGE Reviewer **Group Inbox**. College reviewer must **Take**

**Ownership**, review, and **Route**. Should get message Success routing to CAMPUS Apply

stop. (If college on job(s) ended is not the Home College transaction routes to Home

College before reaching the campus.)

d. Transaction appears in CAMPUS apply **Group Inbox**. Campus applier must **Take**

**Ownership**, review, and **Apply**.