Reappointments
HR FRONT END TRAINING
HOW-TO GUIDE
# Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

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# Course Information

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<thead>
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<th>Reappointments</th>
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</thead>
<tbody>
<tr>
<td>Revision Date:</td>
<td>October 10, 2020</td>
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<td>1.0</td>
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</table>

## APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon

- Do not share your passwords or store them in an unsecured manner.
- Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information

- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.
### HR Front End Reappointment Quick View

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<td>4</td>
<td>• Review Proposed Changes in the Employee Record View. Edit data if necessary.</td>
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<td>• Add additional components if necessary.</td>
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<td>6</td>
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</tr>
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**Introduction**

This guide will help you understand and process Reappointment transactions in the HR Front End. It includes an explanation of the Reappointment transaction and gives general guidelines about when it is appropriate to use the Reappointment transaction type. It also provides instructions on how to complete Reappointment transactions.

**Assumptions**

This guide assumes that you have completed the HR Front End Overview and Navigation online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the HR Front End Overview and Navigation course is not repeated in this guide.

Before processing a Reappointment transaction, ensure that prior approvals have been obtained where applicable.

**What is a Reappointment?**

Reappointment transactions in the HR Front End are used for one of two purposes:

- **Extend a Job:** A Reappointment can extend a job that has a Job End Date.
  
  For example, an international employee’s Visa is renewed, and the job now needs to be extended. Use a Reappointment to edit the end date in this case.

- **Reactivate a Job:** You can reactivate a terminated job that the employee once held using a Reappointment transaction. Only active employees can be reappointed to a job. If the individual is not an active employee, then a New Hire transaction is required to rehire the person. To determine whether an employee is Active or Terminated, check the Status on the General Information tab of the Employee Record View.

  For example, a student held a position with your unit two semesters ago. When the student left campus to study abroad the job was ended, but the student is still shown as an active employee in the HR Front End. Now the student has returned to complete study on campus and will return to the same job previously held with your unit. Use a reappointment transaction to reappoint the job for the student employee.

In both of these cases, the job you wish to reappoint already has a specified Job End Date. Only jobs with Job End Dates are eligible for reappointment.

Also, you must have proper authorization to the job you wish to reappoint. If you open the record of an employee who you do not currently “own”, you will receive a Limited Employee Record View that will allow you to reappoint only jobs the employee has held which your unit owns.

If you need to reappoint multiple jobs for an employee, this can be accomplished in a single transaction by adding a component for each job to be reappointed. The Reappointment Wizard leads you through the required screens for each job.
Salary Planner or other mass reappointment programs will still be used for:

- Budgeted Faculty and Other Academics
- Budgeted Academic Professionals
- Civil Service and Extra Help
- Mass grad reappointments for fall semester

Reappointment transactions should not be used to:

- Correct Job End Dates. To correct Job End Dates use a Job End Date transaction.
- Change an employee from Visiting to permanent. This would be a transaction that involves Job End Date and either Employee Record Change or Add a Job depending on your unit/campus procedures.

**Conventions Used in this Guide**

- Indicates a **Note** or additional information that might be helpful to you.
- Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.
- Indicates a **Hint** such as a tip, shortcut, or additional way to do something.
Reappointing a Job

Jobs can only be reappointed to an active employee. To reappoint a job, it must have an existing Job End Date. Follow these steps to complete a Reappointment transaction in the HR Front End:

Beginning a Reappointment

To begin a Reappointment Transaction, you must first open the employee’s record.

1. Click Employee Search in the navigation bar at the top of the screen.

   *The Employee Search screen appears.*

   ![Employee Search screen](image)

   **Figure 1: Employee Search screen**

2. Type or select the search criteria in the available fields and click Search.

   *The search results appear in a table at the bottom of the screen.*

3. Highlight the desired employee in the results list and click Select.

   *The Employee Record View for the selected employee appears. (See Figure 2)*

4. Click Transactions in the toolbar and select Reappoint/Reactivate Job from the list.

   *The Job Selection screen of the Reappoint/Reactivate Job Wizard appears (see Figure 33).*
Figure 2: Employee Record View - Reappoint / Reactivate Job

Job Selection Screen

The Job Selection screen, the first screen of the wizard, allows you to choose the job to be reappointed. You must choose a job from the list of eligible jobs on this screen.

5. Select the job you wish to reappoint
6. Click Continue.

The Reappointment/Reactivation Dates screen of the wizard is displayed.

NOTE: The only jobs that appear in the Job Selection screen are those that meet all of these conditions:
- The employee either currently holds or has at one point held the job (same Position and Suffix combination).
- You have security access to the job.
- The job has an end date in the past (except GA, which can have future date).
- The job employee class does not begin with C or D.

HINT: Click Close in this screen of the wizard to return to the Employee Record View as of today’s date.

WARNING: The transaction will be lost if you click Close before the transaction is saved.
Reappointments

**Reappointment/Reactivation Dates Screen**

Reappointment/Reactivation Dates is the final screen of the wizard. It allows you to enter the begin and end dates for the job being reappointed.

7. Type the **Reappointment/Reactivation Begin Date**. If applicable, type the **Reappointment/Reactivation End Date**. Then click **Continue**.

The Employee Record View appears as of the Reappointment/Reactivation Begin Date (see Figure 5).

**NOTE:**

- The **Reappointment/Reactivation Begin Date** must be after the Current Job End.
- The **Reappointment/Reactivation End Date** must be after the Reappointment/Reactivation Begin Date. The end date is only required if the Job E-Class is GA or RA. Entering an end date for other employee classes is allowed, but is not required.

**HINT:**

- To return to the previous screen of the wizard use the **Job Selection** breadcrumb below the Person Bar.
- Notice that the **Save** button now appears. This button can be clicked to save the transaction and assign a transaction ID. Once saved the transaction appears in **My Inbox**, and you can access it there later to finish it.
Reappointments

After the last screen of the wizard is completed, the **Employee Record View** shows the state of the employee as of the **Reappointment/Reactivation Begin Date** entered into the wizard.

8. If there are multiple components for the transaction, click the **View** link to the left of the Reappointment component.

The **Employee Record View** refreshes as of the **Change Date** for the component.

**NOTE:** If multiple jobs are reappointed with the same **Reappointment Begin Date**, they are all included in one transaction component. If different begin dates are used for each reappointment, a separate component will be generated for each job reappointed.

**NOTE:** The Proposed Changes accordion at the top of the Employee Record View (see Figure 6) summarizes all the changes proposed on this transaction. The Change Date and Personnel Date for the Reappointment (noted by 'REA' in the Change Type column) are the same as the Reappointment/Reactivation Begin Date typed in while completing the wizard.
Reappointments

9. Under the Jobs tab, click the accordion bar with the reappointed job to view the Job Detail. The Job Detail accordion for this job is expanded.

NOTE:

- Any values in the Job Detail that were not specified as part of the wizard default to the values from the last effective-dated job record in Banner.
- The Personnel Date now equals the Reappointment/Reactivation Begin Date typed into the wizard. This value is editable.
- The Job End Date also appears if a value was typed into the wizard. This field is not editable.
- The Job Change Reason defaults to RA001 - Reappointment. This reason is editable.
- The Job Status is set to A - Active.

Figure 5: Employee Record View after Reappointment Wizard
10. Edit any data in the editable Job Detail fields that has changed since the employee last held this job. This might include Title, Job Type, FTE, Pay Rates, Timesheet Org, and so on, depending on the employee class and your security.

The data edited now appears highlighted in red. The original value is in a white box below the new value.
11. Click **Save**

    The transaction is now ready to be routed and applied to Banner.

**HINT**: Data in the *Job Labor Distribution* and *Position Data* accordions are also editable as they would be in Job Changes. All other accordions are un-editable. Job Suffix is also not editable in a Reappointment transaction.
Appendix A – Reappointment Process Flow

Reappointment transactions in the HR Front End are processed with the help of a wizard. Below is the Reappointment process steps, including before, during, and after.

- Access Timeline View or Employee Record View
- Select Reappoint/Reactivate Job from Transactions menu
- Wizard appears providing a list of eligible jobs
- Select job to be reappointed and click Continue.
- Enter Reappointment/ Reactivation Dates
- Choose one of the effective-dated records and click Continue
- System displays Employee Record View with Proposed Changes
- Make necessary changes to Employee Record View
- Transaction Routed
- Transaction Reviewed
- Transaction Applied
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Appendix B: Screenshots of HRFE Video

Welcome to the:

Reappointment Transaction

course
This course will help to equip you when you are working with Reappointment transactions in the HR Front End Application.
Appropriate Use and Security of Confidential and Sensitive Information

Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.

- Do NOT share passwords or store them in an unsecured manner
- Do NOT leave workstation unattended while logged on to administrative information systems
- Do NOT share confidential and sensitive information with anyone, including colleagues, unless there is a business reason
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view
- Secure reports containing confidential and sensitive information (e.g. FERPA, EEO, or HIPAA protected data)
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.
Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What a Reappointment transaction is
- Business Process Flow
Reappointment Wizard - Button Functionality

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>FUNCTIONALITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply</td>
<td>The Apply feature completes the transaction and applies the data to Banner. The User must have Apply permissions for this button to be active. The Close button enables the user to exit the transaction.</td>
</tr>
<tr>
<td>Close</td>
<td>The Continue button is used to proceed through the screens of a Wizard.</td>
</tr>
<tr>
<td>Continue</td>
<td>The Delete Transaction button is used to delete a transaction from the system.</td>
</tr>
<tr>
<td>Delete Transaction</td>
<td>The Print Friendly View button opens a separate window that will align the data from the current screen in a format that can be easily printed.</td>
</tr>
<tr>
<td>Print Friendly View</td>
<td>The Route feature sends the transaction on to the next stop in the predetermined routing for the transaction.</td>
</tr>
<tr>
<td>Route</td>
<td>The Save button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User’s inbox (My inbox).</td>
</tr>
<tr>
<td>Save</td>
<td>The Send To feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.</td>
</tr>
</tbody>
</table>

Click the Next button to continue.
What is a Reappointment?

Reappointment Transactions are used for one of two purposes:

- **Extend a Job**: A Reappointment can extend a job that has a Job End Date.
- **Reactivate a Job**: You can reactivate a terminated job that the employee once held using a Reappointment transaction. Only active employees can be reappointed to a job. If the individual is not an active employee, then a New Hire transaction is required to rehire the person. To determine whether an employee is Active or Terminated, check the Status on the General Information tab of the Employee Record View.
Only jobs with Job End Dates are eligible for reappointment.

User must have proper authorization to the job you wish to reappoint. If you open the record of an employee who you do not currently “own”, you will receive a Limited Employee Record View that will allow you to reappoint only jobs the employee has held which your unit owns.

If you need to reappoint multiple jobs for an employee, this can be accomplished in a single transaction by adding a component for each job to be reappointed. The Reappointment Wizard leads you through the required screens for each job.
Reappointments Quick View

1. Locate the employee’s record and initiate a Reappointment transaction.
2. Complete the Job Selection screen.
3. Complete the Reappointment Dates screen.
5. Add additional components if necessary.
6. Add Transaction Memo and attach related documents, if necessary.
7. Route/review the transaction.
8. Apply the transaction to Banner.

Click the Next button to continue.
Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What a Reappointment transaction is
- Business Process Flow
Chapter 2

Initiating a Reappointment Transaction

In this Chapter, you will learn:

- How to initiate a reappointment transaction
- How to select the job you wish to reappoint in the Reapointment wizard
- How to enter reappointment dates
To begin a Reappointment Transaction, you must first open the employee's record. Once you have selected a UIN that you have permissions to, you will be taken to the Employee Record View.

Also, you must have proper authorization to the job you wish to reappoint. If you open the record of an employee who you do not currently “own”, you will receive a Limited Employee Record View that will allow you to reappoint only jobs the employee has held which your unit owns.
Reappoints

Reappointment Transaction - HR Front End

**Job Selection**

This employee is currently working in or has been in the following jobs that you (the user) own. Only jobs with End Dates are listed and eligible for reappointment or reactivation. Please select the job you wish to reappoint/reactivate this employee on and click Continue if you want to reappoint/reactivate employee on more than one of the listed jobs, you will need to proceed through this wizard separately for each.

The Job End Date listed is what is in Banner. If reappointing or reactivating the same job multiple times within a transaction any new job end dates are not reflected.

<table>
<thead>
<tr>
<th>Position</th>
<th>Suffix</th>
<th>Job Title</th>
<th>Job E-Class</th>
<th>Job End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>U69041</td>
<td>00</td>
<td>GRAD TEACH ASS'T</td>
<td>GA</td>
<td>05-15-2006</td>
</tr>
<tr>
<td>U69421</td>
<td>00</td>
<td>GRAD RES ASS'T</td>
<td>GA</td>
<td>12-31-2009</td>
</tr>
<tr>
<td>U78897</td>
<td>SM</td>
<td>SUMMER GRAD RES ASS'T</td>
<td>GA</td>
<td>07-15-2009</td>
</tr>
</tbody>
</table>

**The Job Selection screen, the first screen of the wizard, allows you to choose the job to be reappointed. You must choose a job from the list of eligible jobs on this screen.**

1. Click the job you wish to reappoint
2. Then click the **Continue** button to continue.
Reappointments

1. Type the **Reappointment/Reactivation Begin Date**. 1/1/2010
2. If applicable, type the **Reappointment/Reactivation End Date**. 5/15/2010
3. Then click **Continue**

The **Reappointment/Reactivation End Date** must be after the **Reappointment/Reactivation Begin Date** and is only required for certain Employee Classes.

**Reappointment/Reactivation Dates** is the final screen of the wizard. It allows you to enter the begin and end dates for the job being reappointed.
Chapter 2 Review

In this Chapter, you learned:

- How to initiate a reappointment transaction
- How to select the job you wish to reappoint in the Reappointment wizard
- How to enter reappointment dates
Chapter 3

Reviewing the Reappointment Transaction

In this Chapter, you will learn about:

- The Proposed Changes accordion
- Reviewing and editing any information on the Employee Record View
- Routing the transaction
The **Proposed Changes** accordion summarizes all the changes proposed on this transaction. If there are multiple components for the transaction, click the **View** link to the left of the Reappointment component. Click the **Wizard** link to make changes in the wizard.

After the last screen of the wizard is completed, the **Employee Record View** shows the state of the employee as of the **Reappointment/Reactivation Begin Date** entered into the wizard. The reappointed job appears in green denoting that the information is system generated.
Reappointments

Notice the Personnel Date field is 1/1/2010, which carries over from the wizard.

Edit any data in the editable Job Detail fields that has changed since the employee last held this job. This might include Title, Job Type, FTE, Pay Rates, Timesheet Org, and so on, depending on the employee class and your security.
After necessary changes have been made to the job, the transaction is ready to be routed.
Once the transaction has been routed you will get a success routing message.
Chapter 3 Review

In this Chapter, you learned about:

- The Proposed Changes accordion
- Reviewing and editing any information on the Employee Record View
- Routing the transaction
You have reached the conclusion of the Reappointment Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the COMPLETE COURSE button below.