

Reappointment

Human Resources Front End

How-To Guide

HR Front End Training Team

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

Reappointment

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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.

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HR Front End Reappointment 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.
- 4
 - Review Proposed Changes in the Employee Record View. Edit data if necessary.
- 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.

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Introduction

This guide will help you understand and process Reappointments in the HR Front End. It includes an explanation of Reappointments 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 **Hint** such as a tip, shortcut, or additional way to do something.



Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

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.*

The screenshot shows the 'Employee Search' interface. At the top, there is a navigation bar with icons for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, and ADMIN TO. The main form contains several search criteria:

- UIN:** A text input field with a yellow circle '2' around it.
- LAST NAME:** A text input field with the placeholder 'Last Name'.
- FIRST NAME:** A text input field with the placeholder 'First Name'.
- USERID:** A text input field.
- SSN:** A text input field.
- COA:** A dropdown menu with '9 - University of Illinois - Admin' selected.
- COLLEGE:** A dropdown menu with '* - All' selected.
- DEPARTMENT:** A dropdown menu with '* - All' selected.
- ORGANIZATION:** A dropdown menu with '* - All' selected.
- CAMPUS:** A dropdown menu with 'U - UIUC Urbana / Champaign' selected.
- EMPLOYEE GROUP:** A dropdown menu with '* - All' selected.

Below the form, there is a checkbox for 'INCLUDE TERMINATED EMPLOYEES' (unchecked) and 'Search' and 'Reset' buttons. At the bottom, there is a 'Refresh' button, a 'Select' button (with a yellow circle '3' around it), and the text 'Query returned 1 rows.' Below this, a table displays the search results:

UIN	Last Name	First Name	E-Class	Emp Status	Home ORG
98765432	Last Name	First Name	BA - Acad/Pro 12mth Ben Elig	A	U-9-904001 - AYP Human Resources/Shared

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).

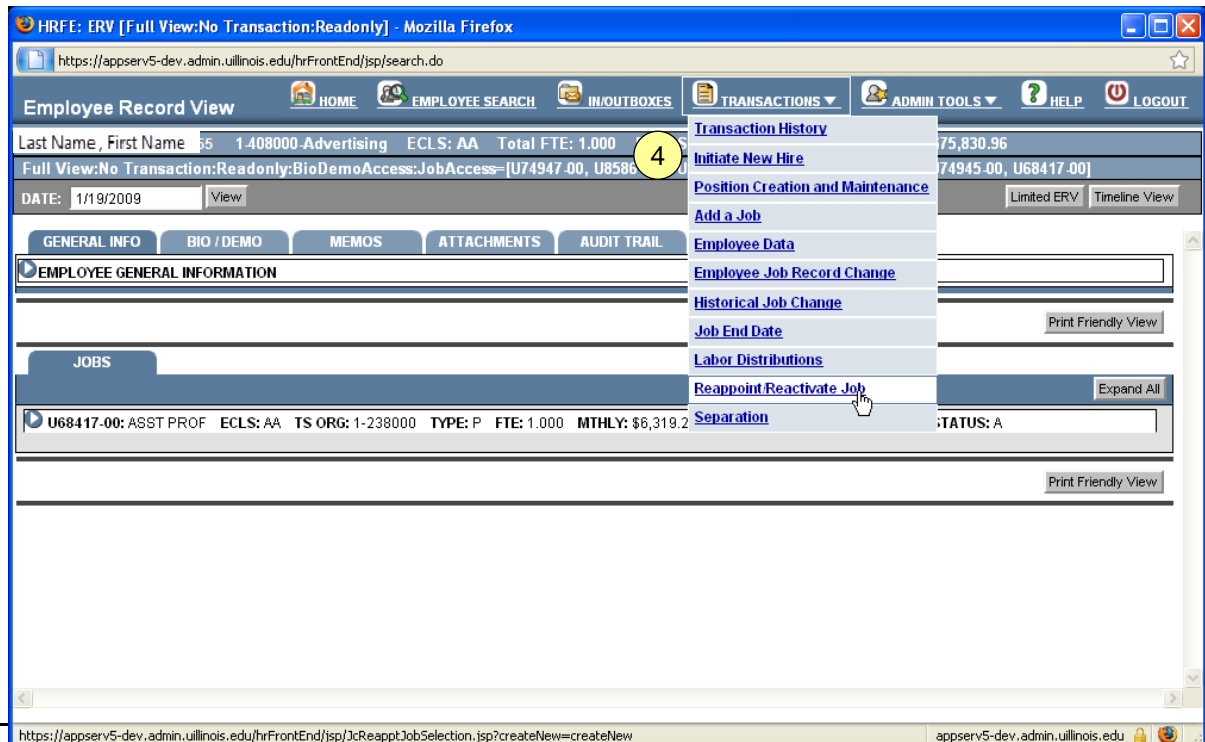


Figure 2: Employee Record View - Reappoint / Reactivate Job

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.

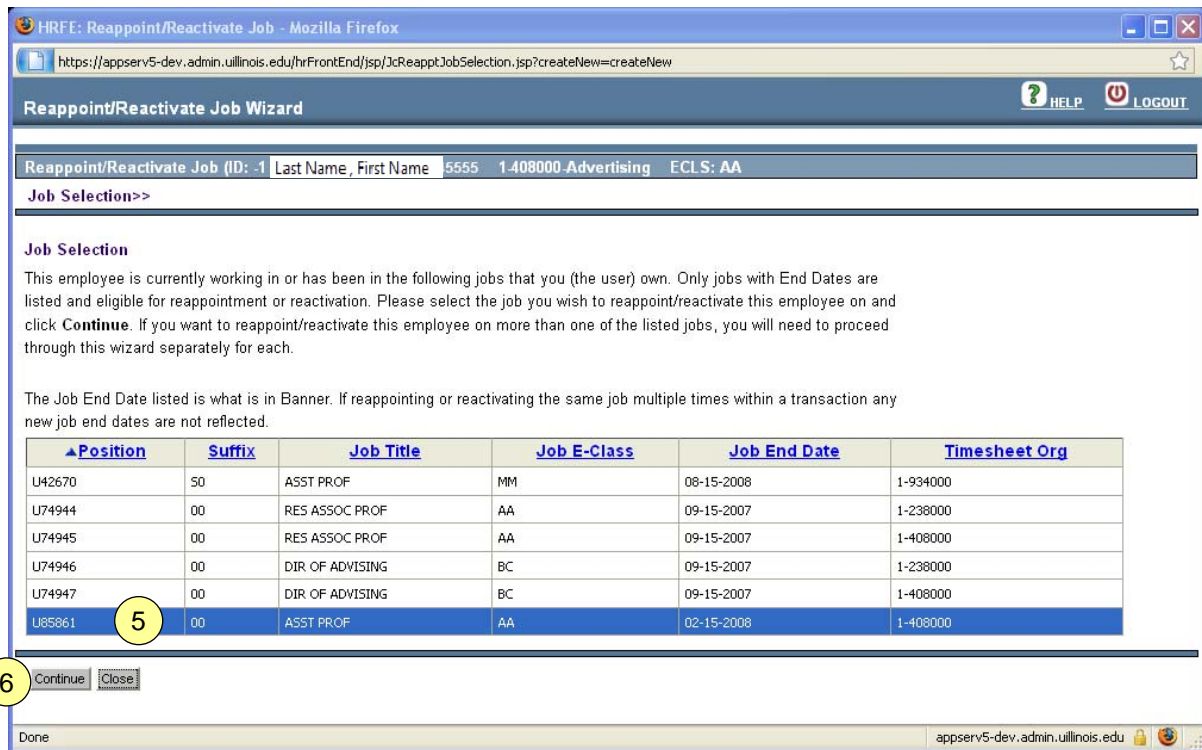


Figure 3: Job Selection screen

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.



Figure 4: Completed Reappointment/Reactivation Dates screen

Employee Record View after Reappointment 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.

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.

HRFE: ERV [Full View: Transaction (1242:3216) REAPPT (3834):Editable] - Mozilla Firefox

https://appserv5-dev.admin.uillinois.edu/hrFrontEnd/jsp/ERV.jsp

Employee Record View

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Last Name, First Name 1-408000-Advertising ECLS: AA Total FTE: 1.500 Base Salary: \$113,185.93 Total Salary: \$113,185.93

Full View: Transaction (1242:3216) REAPPT (3834):Owner=Yes :Not Completed:Editable:BioDemoAccess:JobAccess=[U74947-00, U85861-00, U74946-00, U74944-00, U42670-S0, U74945-00, U68417-00], Stop: DEPT:Default:Initiate A U-1-KT-408-408000 (1242:3216)

DATE: 1/16/2009 View Limited ERV Timeline View

PROPOSED CHANGES

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type
3834	01/16/2009	01/16/2009	U85861-00 ASST PROF	1-408000 Advertising	RA001, Reappointment	REA

Add Change

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

JOBS

ID	ECLS	TS ORG	TYPE	FTE	MTHLY	BEGIN	END	BGT PRO	STATUS
U68417-00	AA	1-238000	P	1.000	\$6,319.25	8/16/2007		R	A
U85861-00	AA	1-408000	S	0.500	\$3,112.91	8/16/2007	5/15/2009	R	A

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

Figure 5: Employee Record View after Reappointment Wizard

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*.

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

JOBS Expand All

U68417-00: ASST PROF ECLS: AA TS ORG: 1-238000 TYPE: P FTE: 1.000 MTHLY: \$6,319.25 BEGIN: 8/16/2007 BGT PRO: R STATUS: A

U85861-00: ASST PROF ECLS: AA TS ORG: 1-408000 TYPE: S FTE: 0.500 MTHLY: \$3,112.91 BEGIN: 8/16/2007 END: 5/15/2009 BGT PRO: R STATUS: A

JOB DETAIL 10

DATES

PERSONNEL DATE:	EFFECTIVE DATE:	LAST PAID DATE:	JOB BEGIN DATE:	JOB END DATE:
1/16/2009		2/15/2008	8/16/2007	5/15/2009
2/15/2008	2/15/2008		2/15/2008	

POSITION: U85861 SUFFIX: 00 POSITION CLASS: AACAA - TENUR 9MO ASPRO JOB TITLE: ASST PROF JOB TYPE: S - Secondary

PAY RATE

PAY ID:	FACTOR:	JOB FTE:	APPT %:	HOURLY:	MONTHLY:	ANNUAL:	JOB STATUS:
MN - Monthly	12	0.500	100.0	35.916859	\$3,112.91	\$37,354.97	A - Active
							T - Terminated

TIMESHEET

JOB CHANGE REASON: RA001 - Reappointment COA: 1 ORG: 408000 - Advertising TIME ENTRY METHOD: P - Payroll

FT001 - FTE Change

JOB EMPLOYEE CLASS: AA - Acad 9/12mth Ben Elig LEAVE CATEGORY: A3 - 9/12 mth 2 FH 25 ACCRUE LEAVE: N - No

SALARY

GROUP:	TABLE:	GRADE:	STEP:	PROB PERIOD:	BEGIN DATE:	END DATE:	INCREASE MM:DD:	ANNIV DATE:
2009	AA	UNDFD	0-0					
2008								

BUDGET PROFILE CODE: R - Recurring BARGAINING UNIT: NONE HOURS PER DAY: 8.0 SEARCH NUMBER:

JOB COMMENTS

Comments	UserID	Date
	eret	01-26-2009 11:19

Add

JOB LABOR DISTRIBUTIONS

POSITION DATA

WORK SCHEDULES

SERVICE DATES & CONTRACT PARAMETERS

DEFAULT EARNINGS

FACULTY RANK & TENURE

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

Figure 6: Job Detail in Employee Record View

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

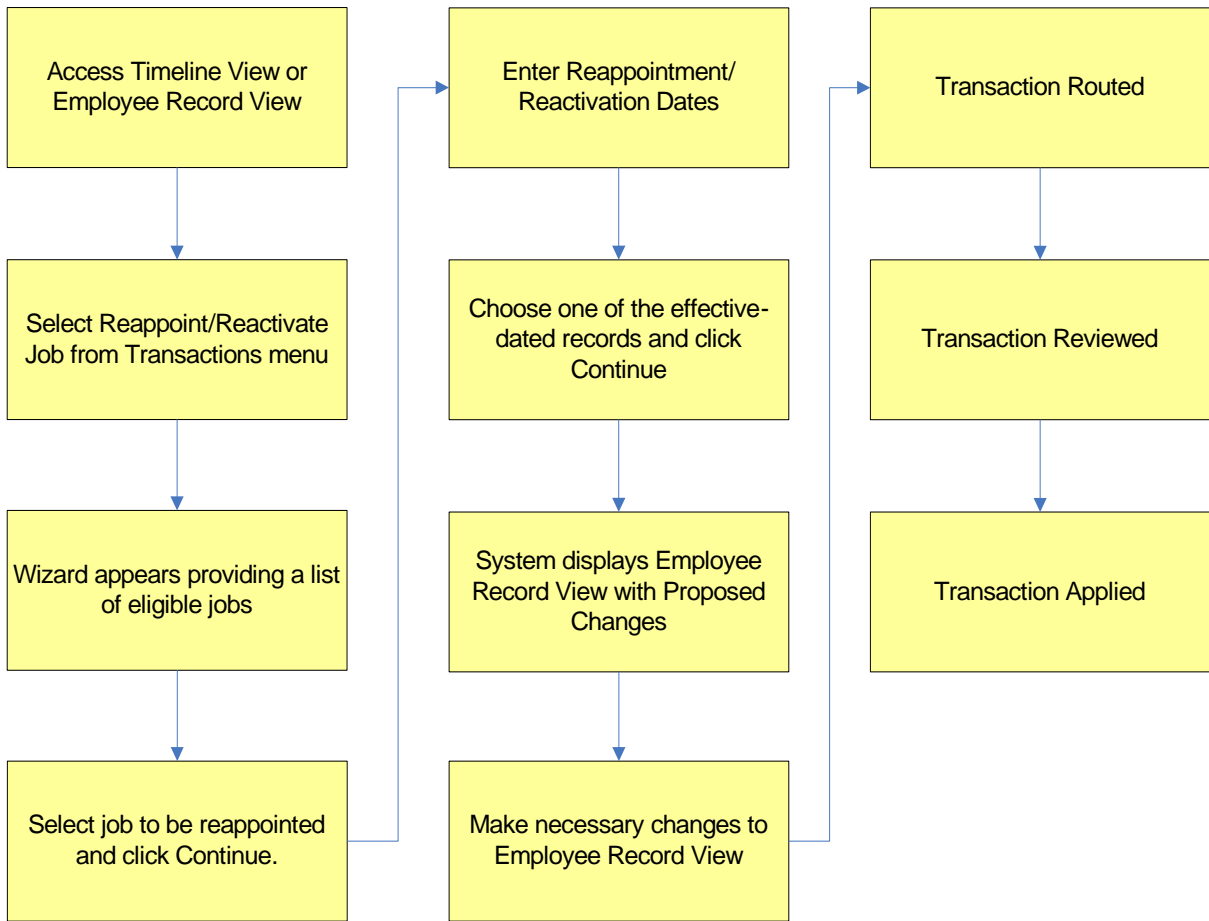
The transaction is now ready to be routed and applied to Banner.



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 flow for the Reappointment process, including steps before, during, and after the wizard.



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