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.
Documents to attach:
- To be attached by Home Org due to ending current job(s)
  - Letter of resignation or other relevant documents
- To be attached by the new Org due to adding job(s)
  - OEOA
  - Offer/Accept letter
  - PAPE
  - Hiring Request form
  - CV if total salary over $90,000 & title appears on BOT approval guidelines
  - 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
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.
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).
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.
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**.
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**.