HR Front End Transaction – Academic Professional Transfer (Initiated by the Home Unit)

Overview
Transaction type: Job End Date, Employee Data Change, and Add a Job
Routing: Home Org Initiate, Send To new Org, Home Org Review, College Review, Campus Apply
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. The Hiring Unit should contact the Home Unit and ask them to start the transaction if they have not already done so. Make sure the Home Unit has information for the person or group in the Hiring Unit who will add the new job(s) to the transaction so that the Home Unit can use Send-To.
2. **Home Unit** searches for employee and opens Employee Record View.
3. 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.
4. Select Transactions→Job End Date.
5. Click the job you want to end to expand the Job Detail if it is not already expanded.
6. Enter the desired end date in the Job End Date field and press Tab.
7. 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.
8. Select the proper Job Change Reason from the list (such as EJ010 for Employee Job resignation).
9. 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.
10. Click Save. **Proposed Changes** accordion appears for the new Job End Date transaction.
11. 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.

12. If you need to end another job for this person, click Add Change and repeat steps 3-11.
13. If necessary, add attachment(s) as follows:
   a. Click Attachments tab
   b. Click Add Attachment
   c. Click Browse, select document to attach (either on your hard drive or network drive).
   d. Click Open
   e. Click Add
   f. Select Document Type, and type a Description.
   g. 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.
   h. Click Done.
   i. 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.

14. Click Add Change in the Proposed Changes accordion to start the next component.
15. Select Transactions»Employee Data.
16. Click once on the Employee General Information accordion to expand it if it is not already
   expanded.
17. Select the new Home COA and Organization.
18. Click Save.
19. Click the Send-To button.
20. Choose a radio button to send the transaction to either a Person or a Group Inbox.
21. Type or select search criteria as appropriate.
22. If sending to a person, click the Refresh button to display employees who match your search
    criteria.
23. Click Send-To.
24. Should get Success performing Send-To message with the group or person information.
    NOTE: Home Unit should monitor the Group Inbox. The transaction will return to the Home
    Unit for review later in the route path.
25. Hiring Unit: Transaction appears in My Inbox if sent to a person, or in Group Inbox if sent to a
    group.
26. Take Ownership of the transaction and open it.
27. Click Add Change in the Proposed Changes accordion.
28. Select Transactions»Add a Job.
29. 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.
30. On the Job Date 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.
31. 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.
32. Click Continue.
33. 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
34. Click Continue.
35. 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.
36. 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.
37. 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.
38. 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 ORG review stop.
c. Transaction appears in 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.)

d. 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.)

e. Transaction appears in CAMPUS applier **Group Inbox.** Campus applier must **Take Ownership,** review, and **Apply.**