

# Semester Reappointment ePAF Training

Semester Reappointments, Semester Conversions & Automated Reappointment Letters

### What We'll Cover Today

- Course Assistants: Move from Salaried to Hourly
- Pooled Position Numbers
- Reappointment ePAF Listing
- Requirements of Reappointment ePAFS
- Semester Based Reappointment Conversion ePAFs
- Semester Based Reappointment ePAFs
- Defaulted Values and Defects
- Demo
- Automated Reappointment Letters
- Faculty Reappointment ePAFs with Step Adjustment
- User Guides
- Questions?





# **Goals and Objectives**

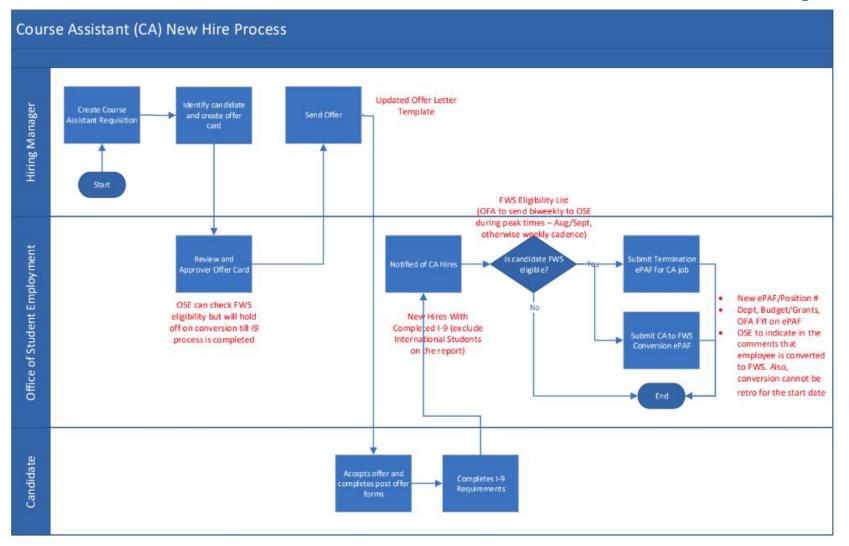
### **FLEXIBILITY**

and more employment opportunities while complying with labor regulations and TC policy

# IMPROVED STUDENT EXPERIENCE

# MAXIMIZE FEDERAL FUNDING

# FYI: New Hires - CA to FWS (If applicable)



- Recruit and send offers to new CAs as per usual
- Updated and Clearly Labeled
   Offer Letters and Pay Rate
   Notices Available in PageUp
- Office of Student Employment (OSE) will work with Office of Financial Aid (OFA) to confirm FWS eligibility and transfer student if necessary

#### Difference:

 Timesheet will display different position number (see next slide)

### Reappointments - Conversion to Hourly

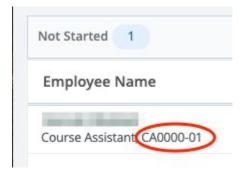
### **Processing:**

- CA0000 is the new HOURLY pooled position number
- Account remains the same 6462 and is budget neutral
- Hourly Rate is \$18/hour and 4.5 hours/week
- Input total appointment amount into comments section (\$18 per hour
   X 4.5 hours per week X 15 weeks = max of \$1215 for the semester)
- Auto Generated Reappointment Letters still apply; inputs in the Comments section remain unchanged

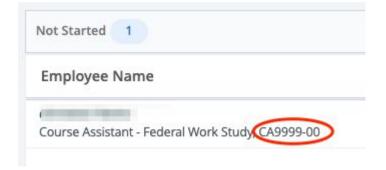
### Timesheets:

- Timesheet submission and approval now required
- Supervisor listed on ePAF will approve timesheets
- Follow bi-weekly payroll calendar; See <u>deadlines here.</u>

### **CA Timesheet**



### **CA - FWS Timesheet**







### **Pooled Position Numbers**

Category	EClass	Position	Position Description	Account
PT Instructional	31 - Part Time Instructor	N00000	Part-Time Instructor	6122 - PT Instructors Exempt
PT Instructional	35 - Adj/PTVisiting Prof/PTLecturer	A00000	Adjunct Professor	6132 - PT Adjunct Professor Exempt
PT Instructional	39 - Community Teachers	M00000	Community Teachers	6142 - Community Teacher
PT Instructional	81 - Fee Based Instructors	B00000	Fee Based Instructors	6152 - PT Fee Based Instructor Exempt
Professional Staff	45 - Part Time Professional Stud	G00000	Part Time Professional Student	6432 - PT Professional Students
Professional Staff	48 - Temporary Professional	E00000	Temporary Professional	6252 - Temporary Professional Exempt
Graduate Assistant	87 - Research/Teaching Assistant	R00000	Research Assistant	6422 - TA/RA - Part-Time
Graduate Assistant	87 - Research/Teaching Assistant	RT0000	Teaching Assistant	6422 - TA/RA - Part-Time
Doctoral Research Fellow	88 - Doctoral Research Fellow	D00000	Doctoral Research Fellow	6442 - Doctoral Research Fellow-Part-Time
Student Assistant	84 - Course Assistant	CA0000	Course Assistant	6462 - Course Assistants
Student Assistant	89 - Administrative Fellows	F00000	Administrative Fellow	6412 - Administrative Fellows Part-Time
Student Assistant	90 - Work Study	CA9999	Course Assistant - Federal Work Study	7829 - College Work Study
Student Assistant	90 - Work Study	999999	Federal Work Study	7829 - College Work Study
Student Assistant	93 - Interim Student	TS0000	Interim Student	6452 - Temporary Prof. Non-Exempt Student
Interim	91 - Interim Employee	T00000	Interim Employee	6254 - Temporary Professional Non-Exempt





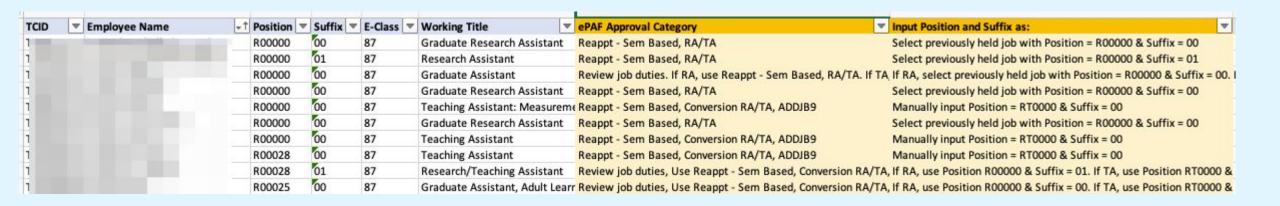
### Reappointment ePAF Listing

Providing a more detailed reappointment listing which will detail which ePAF Approval Category, Position and Suffix to use.



### Reappointment ePAF Listing for RAs and TAs

Providing a more detailed reappointment listing which will detail which ePAF Approval Category, Position and Suffix to use.



\*\*Please update the working title of all RA/TA reappointments. In Comments section, input "Title = xxxxxxxxx"



# **CAs on Reappointment ePAF Listing**

Since we are moving all CAs to hourly, they will all be processed on:

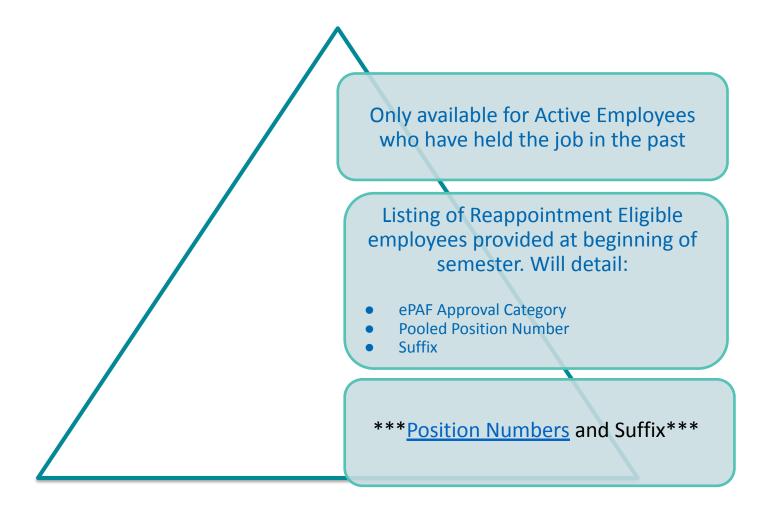
Position = CA0000

Suffix = 00

We will reintroduce CA (hourly) reappointments for Spring 2025.



### Requirements of ePAFs





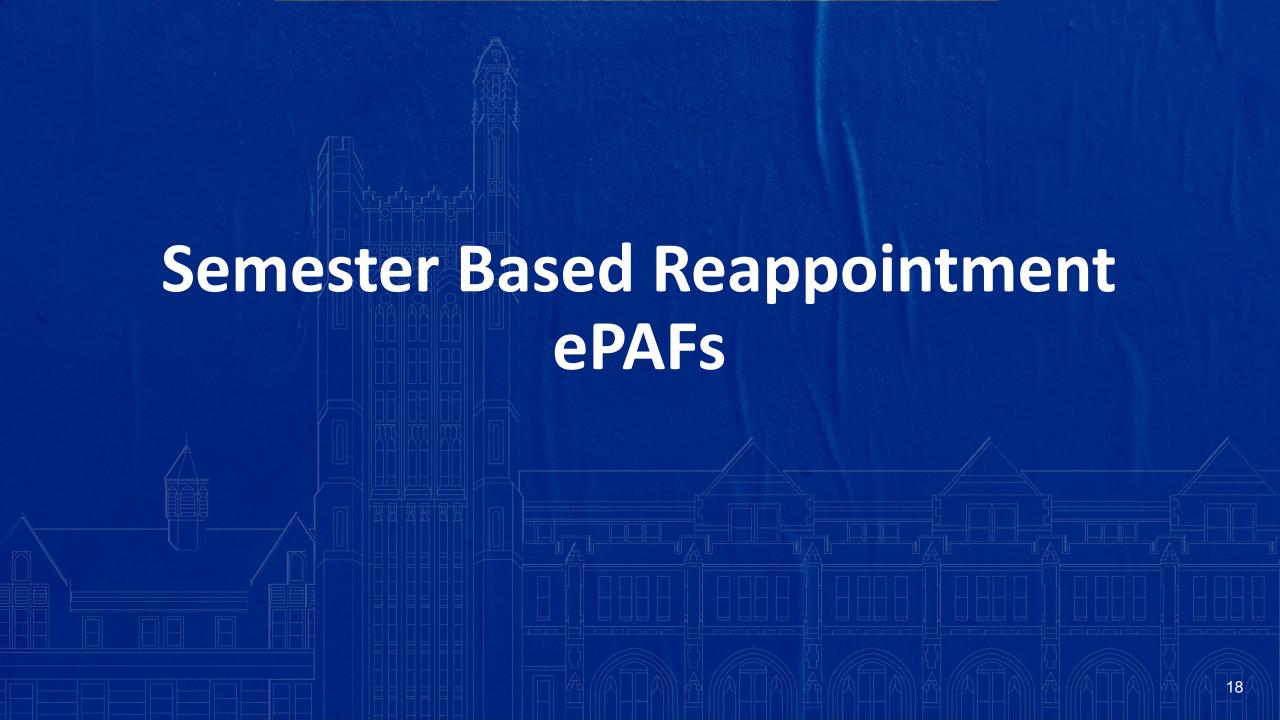
### **Semester Based Conversion ePAFs**

These ePAFs will reappoint AND convert the employee into the updated pooled position numbers (see <u>Slide 8</u>)

Employee Group	ePAF Approval Category	Account	Pay Type
PT Instructors	Reappt - Sem Based, Conversion Adjunct Professor ADDJ10	6132	Salaried
	Reappt - Sem Based, Conversion PT Instructors ADDJ10	6122	Salaried
	Reappt - Sem Based, Conversion Fee Based Instructors ADDJ10	6152	Salaried
Community Teachers	Reappt - Sem Based, Conversion Comm. Teachers ADDJ11	6142	Salaried
Research Assistants/	Reappt - Sem Based, Conversion Research Assistants, ADDJB9	6422	Salaried
Teaching Assistants	Reappt – Sem. Based, Conversion Teaching Assistants, ADDJB9	6422	Salaried
Course Assistants	Reappt - Sem Based, Conversion to Hourly Course Assistant, ADDJ14	6462	Hourly

### **Conversion ePAFs**

- Query Date:
  - For Hourly → Input day (MM/DD/YYYY) employee starts work.
  - For Salaried  $\rightarrow$  Input **09/16/2024**
- Manually input new Position and Suffix
- Ignore Time Orgn on Job Listing (can update in ePAF)
- Update Labor Distribution; Use Default from index button
- Always Input "**Title = xxxxxx**;" in comments section



## Semester Based Reappointment ePAFs

Employee Group	ePAF Approval Category	Account	Pay Type
		6122, 6132,	
PT Instructors	Reappt - Sem Based, PT Instructional, PTIAPP	6152	Salaried
Community Teachers	Reappt - Sem Based, Community Teacher, CMMUTY	6142	Salaried
Research Assistants/			
Teaching Assistants	Reappt - Sem Based, RA/TA, GRDAPP	6422	Salaried
Course Assistants	Must use Reappt/Conversion ePAF (see Slide 16)	6462	Hourly



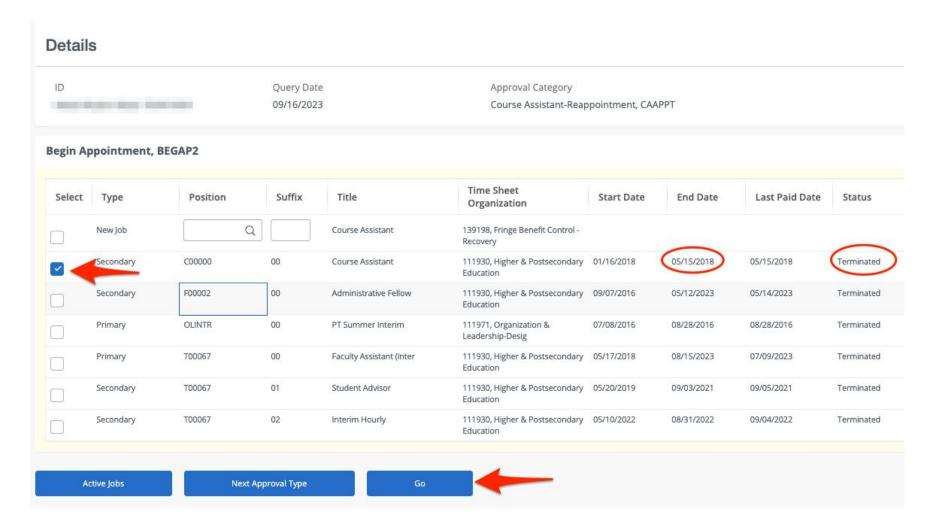
<sup>\*</sup>These ePAFs have not changed. Please use the individual user guides for step-by-step details on the ePAFs

### Reappointment ePAFs

- Query Date: Input 09/16/2024
- Select previously held job (Position and Suffix)
- Ignore Time Orgn on Job Listing (can update in ePAF)
- Update Labor Distribution; Use Default from index button
- Always Input "Title = xxxxxx;" in comments section

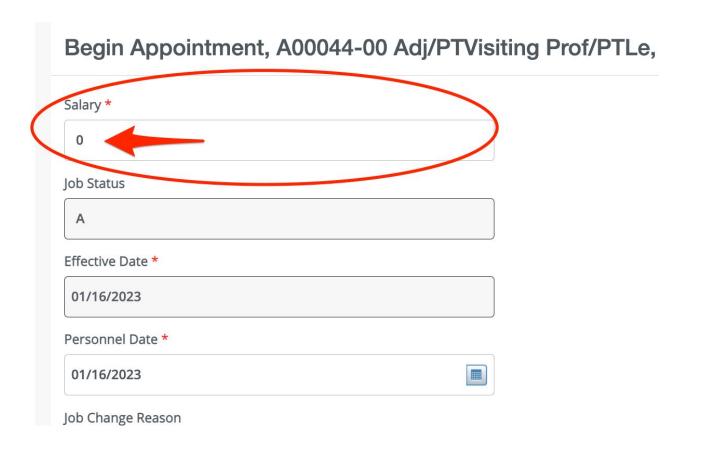


### **Select Previously Held Job**



Review All Jobs and select previously held job as indicated on the reappointment listing

## **Defaulted Values: Salary**



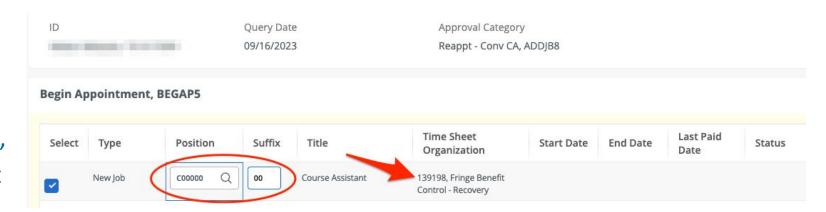
Any ePAFs with a **Salary** or **Hourly Rate** have been defaulted to "0"

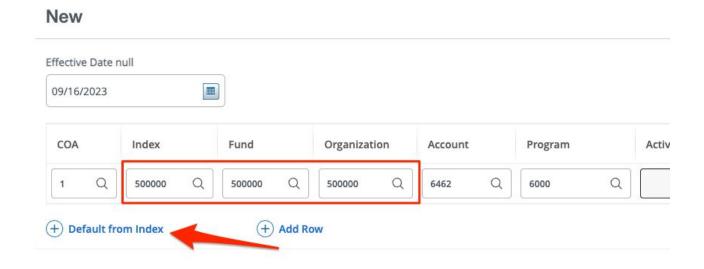
The ePAF will NOT error out, but be sure to <u>update this to the</u> <u>correct amount</u> - otherwise your employee will not get paid.



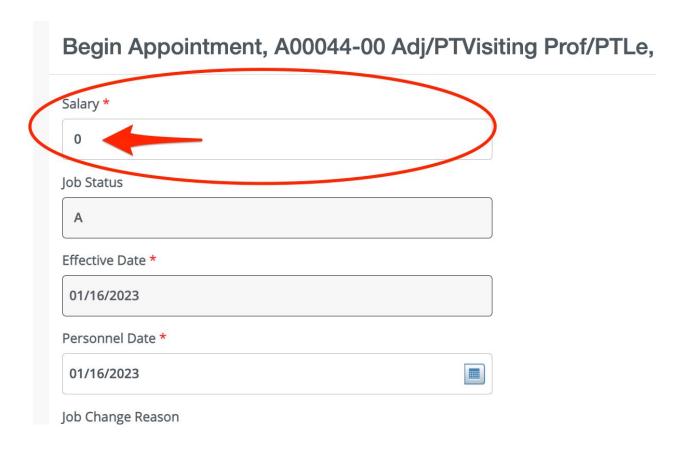
### **Pooled Position - Defaulted Values**

Due to being used across the College, the pooled position numbers will not initially display organizations/indices aligned with your department. You will update this information within the ePAF.





### **Defaulted Values: Salary**

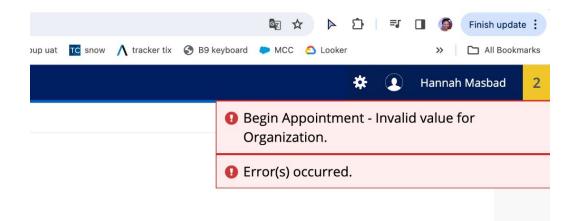


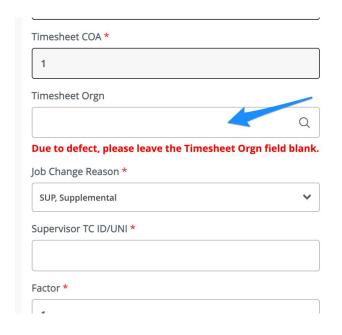
 Any ePAFs with a Salary have been defaulted to "0"

 The ePAF will NOT error out, but be sure to update this to the correct amount - otherwise your employee will not get paid.

### **Defect: Timesheet Orgn Field Defect**

**Defect**: The **Timesheet Orgn** field causes error (shown below)





**Resolution**: Leave field Null

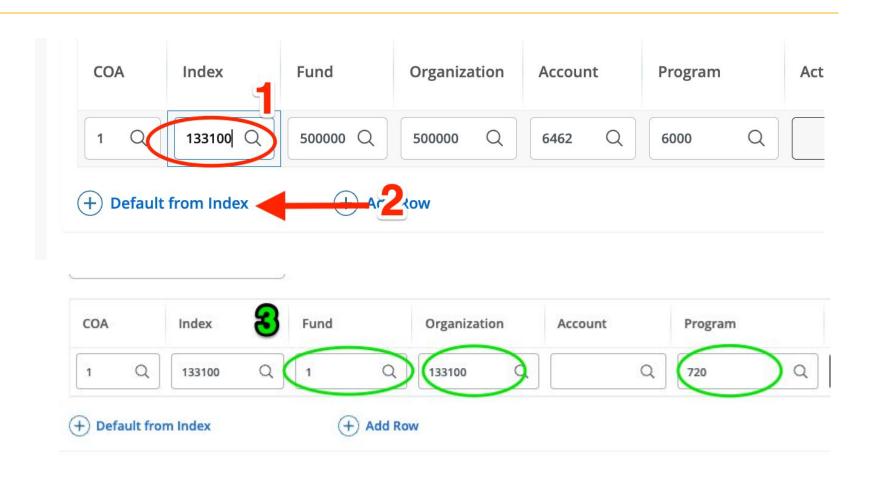
### **Defect: Funding Allocation: Default From Index**

When updating the funding information, you should only update two fields **Index** and **Account**.

**Step 1**. Manually enter the Index field only

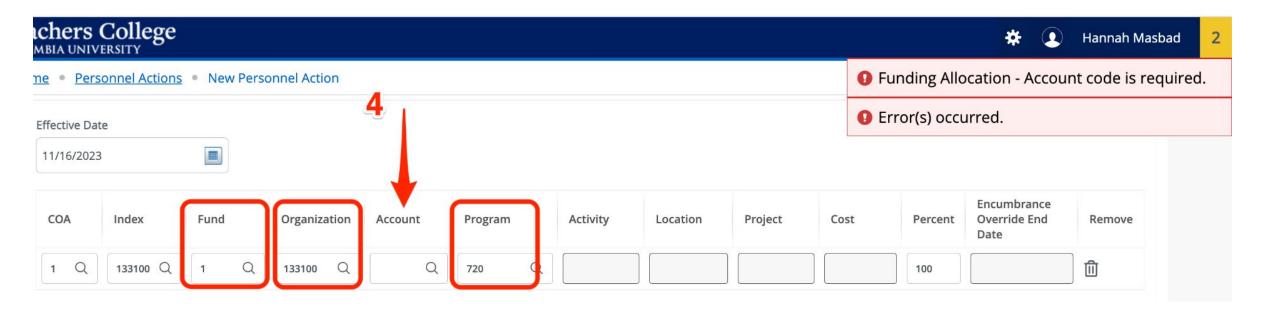
**Step 2**. Click Default from Index

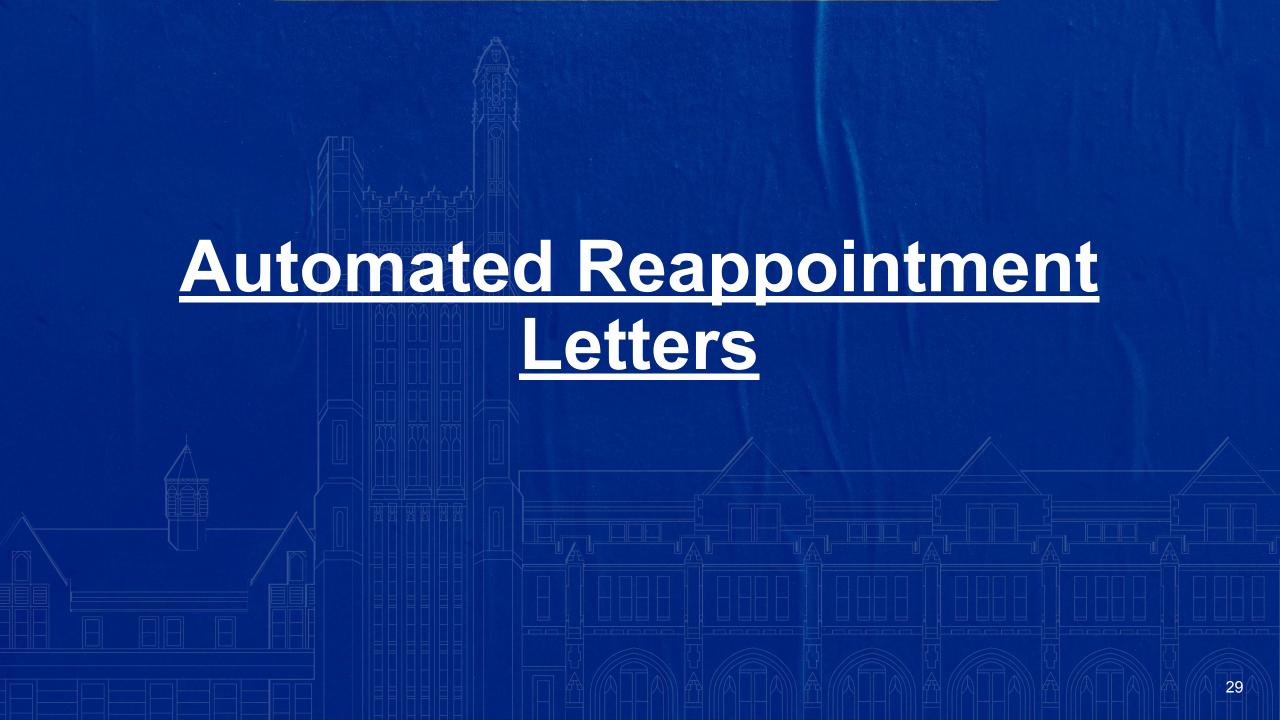
**Step 3.** The Fund, Organization and Program fields will automatically populate



## Defect continued: Account Code is required

Step 4. Enter Account Code





# Things to Have Ready to Auto Generate Reappointment Letters

### **Employee Info**

- Employee Name & TCID
- Position Number to be reappointed

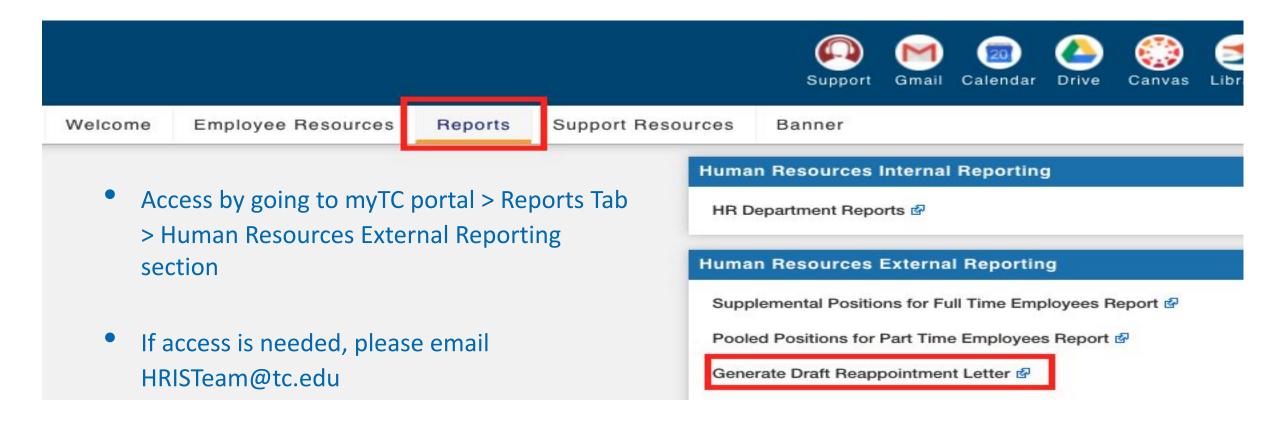
### **Teaching Info**

- Program Name
- Course Name
- Title Update
   (\*Mandatory for
   Conversion ePAFs)
- ORL specific text
- GA Scholarship Points
- GA hours/week

### **Browser Tabs**

- ePAF System
- Reports (to review drafts)

### Reappointment Letter Draft Generator



### **Auto Generated Reappointment Letters Tips**

- ✓ <u>Make sure to review the Draft Letter before submitting the ePAF (ePAF needs to be saved)</u>. Final letter will be automatically sent when ePAF is fully approved and processed.
- ✓ Make sure to include Titles "Title = xxxxx;"
- ✓ Make sure to put semicolons (;) at the end of each comment
- ✓ Make sure to reload the entire web page in the draft generator if changes are made to the ePAF and saved again
- ✓ Supervisor TCID listed in ePAF will be the signatory of the letter
- Reappointed employee's TCID needed to access the reappointment letter

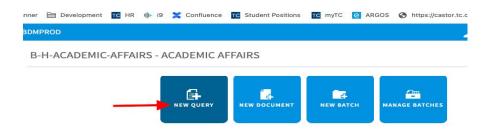


## **Banner Document Management (BDM)**

1. In Banner INB, click **RETRIEVE** in the upper right corner



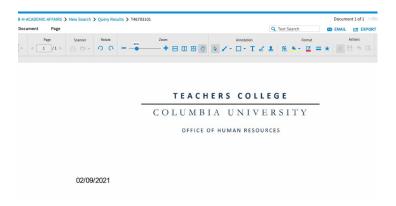
2. You'll be taken to a search page. Click **New Query** 



3. Input the TCID of the employee whose final reappointment letter you'd like to access and click **Run** 



4. You'll now be taken to the final version of the reappointment letter for that employee



## **Auto Generated Reappointment Letters**

- Currently only available for select employee groups:
  - Adjuncts
  - Part Time Instructor
  - Research / Teaching Assistants
  - Course Assistants
  - Interims

#### TEACHERS COLLEGE COLUMBIA UNIVERSITY

A Graduate School of Education, Health & Psychology

07/16/2021 Dear Nancy, DRAFT

We are pleased that you will be teaching in the PROGRAM OF MANIA. This message will serve as your letter of appointment, which will commence on 09/10/2021 and end on 12/15/2021, for Autumn 2021. Please review the academic calendar for specific course dates.

#### Salary & Benefits Information

Title: MASTER OF THE UNIVERSE

Course: AH123
Compensation: \$5,000.00
Pay-cycle: Semi-Monthly

If you have worked at Teachers College in the last few months, you should not have to fill out new HR paperwork. If you are not sure about your status or if you are a non-US citizen, please contact the Office of Human Resources (hr@t.columbia.edu or 212.678.3175) to ensure everything is in order.

If you are to receive a supplement, an email with details will follow

#### Enrollment policies

Your appointment is contingent on your course(s) enrolling a minimum of 21 points. If attendance at the first session suggests that the course is under-enrolled, please discuss with your Program Director as soon as possible.

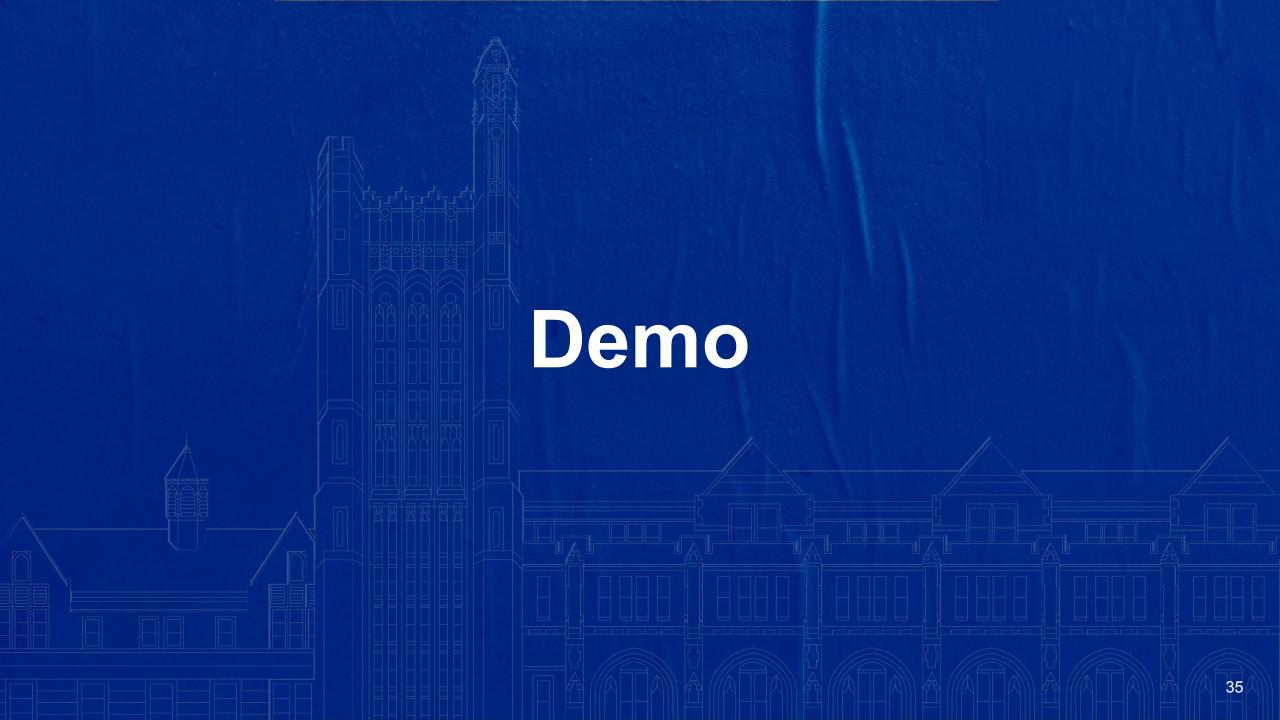
An instructional Guide to acquaint you with various College policies can be found in the TC portal, under the Employee Resources tab. You are expected to abide by all of the College's policies. The area labeled instructional Staff includes the Guide and the College's official syllabus statements.

#### Course Information

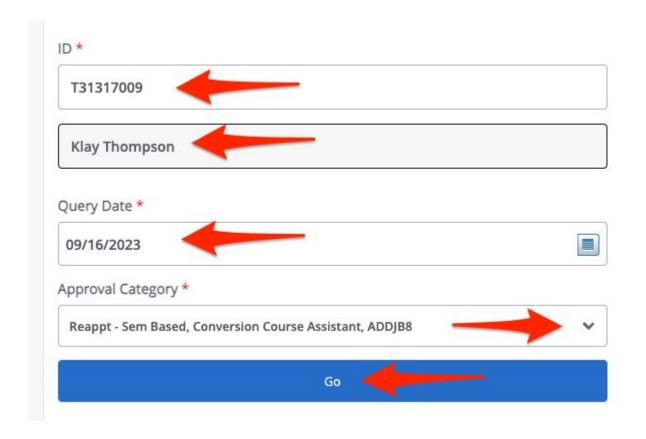
Dates, times and locations of classes may change so please remember to check the TC Course Schedule and contact your Program Secretary with any questions or concerns. Given the ongoing pandemic, Teachers College continues to offer courses primarily online. As such, you will be required to conduct your course(s) remotely. If you have any questions about the necessary IT requirements to conduct your course, please contact TC IT via the "Support" link in MyTC portal.

Once reappointment letter has been reviewed, go back to submit ePAF. See <u>Slide 28:</u> <u>Step 5: Submit the ePAF</u>

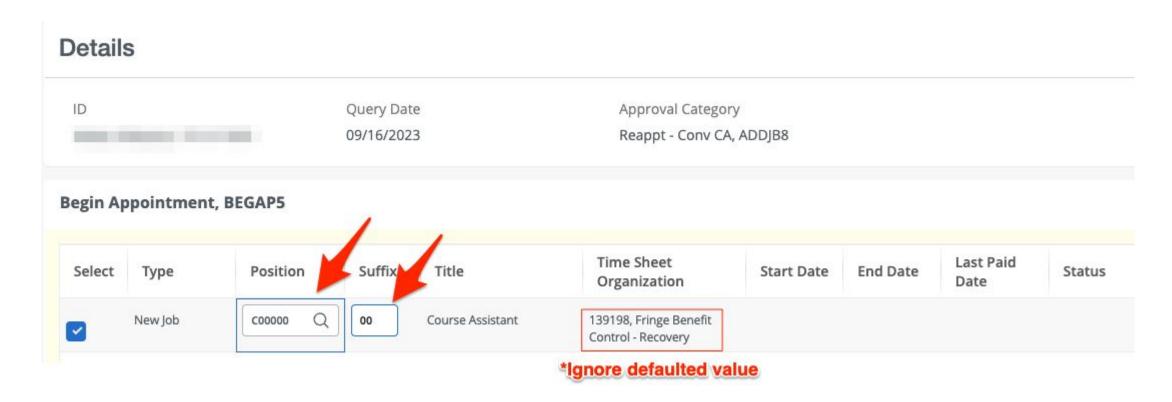




### Step 1: Select an Employee & ePAF Approval Category

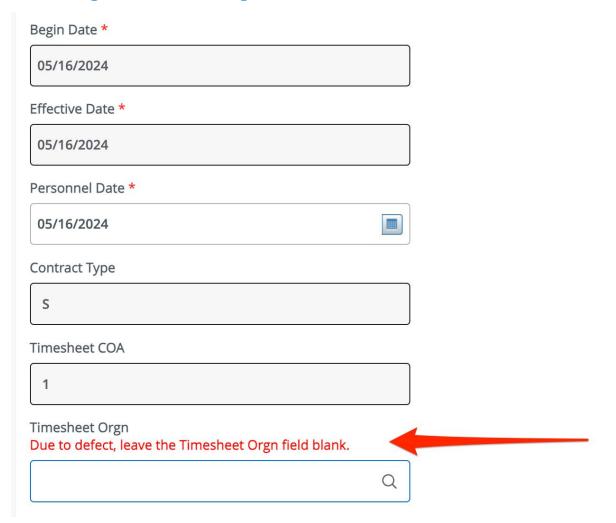


## Step 2: Manually Input Position Number & Suffix





### Step 3: Inputted Enterable Fields on ePAF

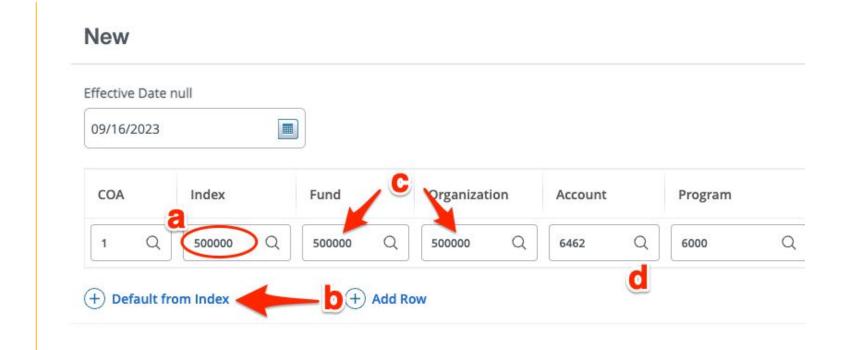


- All Required fields marked by \*
- Due to defect, leave <u>Timesheet</u>
   <u>Orgn field blank</u>

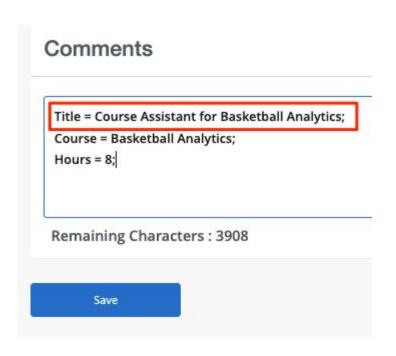
### **Step 3a: Update Labor Distribution Section**

Pooled position numbers will have dummy funding information defaulted. This **must** be updated.

- a. Input your Index.
- b. Click Default from Index.
- c. Fund, Organization and Program will be defaulted.Account will get deleted and you will get an error.
- d. Re -Enter Account.



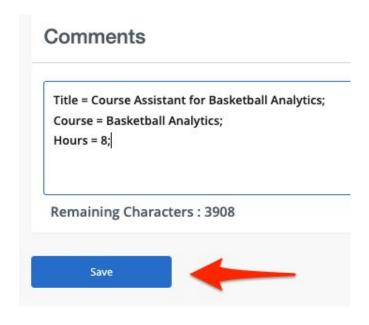
# Step 3b: Input Title and Additional Reappointment Letter Information



For all conversion reappointments, you must input the title along with the other required fields. Please refer to the automated reappointment letter guides for details on each:

- Auto Generate Reappointment Letters for PT Instructors SSB9
- Auto Generate Reappointment Letters for Adjuncts SSB9
- Auto Generate Reappointment Letters for RA\_TA SSB9
- Auto Generate Reappointment Letters for Course Assistants SSB9
- Auto Generate Reappointment Letters for Interim employees SSB9

### **Step 4: Save ePAF**



Once all fields are filled, click Save at the bottom of the ePAF

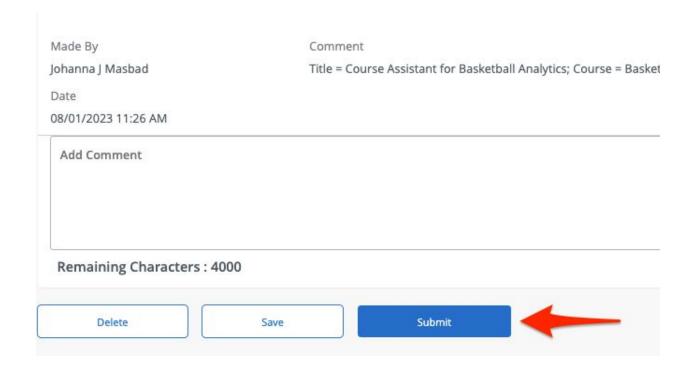


Remember, the transaction still remains at a status of "Waiting"

Save as a draft. Review reappointment letter if applicable. See <u>Slide</u> <u>34: Automated Reappointment Letters</u>



### **Step 5: Submit the ePAF**



After **Updating** or **Saving** the EPAF, you can choose to **Submit** or **Delete** the EPAF from one of the icons listed under the Index.

The EPAF will <u>not</u> be submitted until you **Submit** the EPAF. If the **Transaction Status** still shows 'Waiting' the EPAF has <u>not</u> been submitted.

Remember to only press **Submit** or **Delete** once.



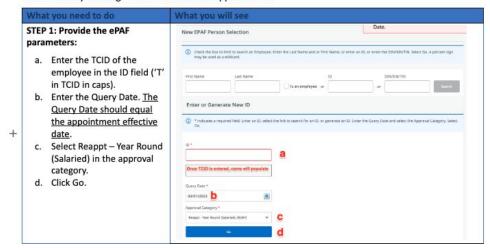
### **User Guides**

### Always available in the <u>Manager's Toolkit</u> on the HR website

#### COLUMBIA UNIVERSITY

#### Reappt - Year Round (Salaried)

This ePAF is used to reappoint the following employee groups: Full Time Faculty & Instructional Staff, Full Time Professionals & Exempt Part Time Professionals. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.



#### **EPAFS**

General Information and Tools

- · Detailed Listing of ePAFs
- · Visual Guide for ePAF Originators
- Visual Guide for ePAF Approvers
- Position Guidance for Additional Compensation or Job
- Determining a Position Number for a Pooled Position for a PT Employee
- Determining a Position Number for a Supplemental Compensation for FT Employee
- · Additional Job or Compensation ePAF Common Issues Guide

#### How To:

Full Guide: Guide to HR Banner Forms & Transactions

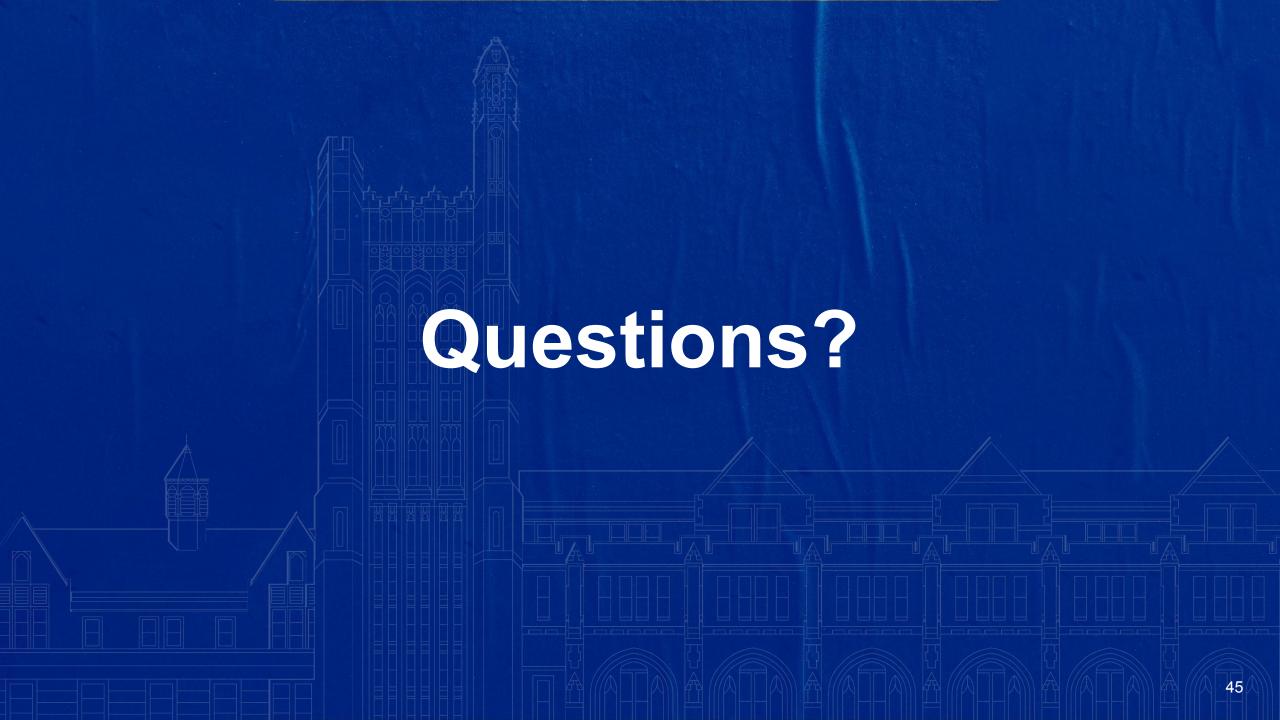
Additional Compensation or Job

- Additional Compensation or Job Salaried
- Additional Job Hourly
- Additional Job College Work Study
- · Additional Job Students
- · Reinstate Job or Compensation Salaried & Hourly

#### Adjustments to Active Jobs

- Salary or Hourly Rate Updates
- · Salary Adjustment Faculty FT Lecturer
- Labor Update
- · Hourly Rate or Labor Update Interim
- Hourly Rate or Labor Update Work Study
- · Timesheet, Leave Report Approver, and or Title Updates
- Joh Tormination



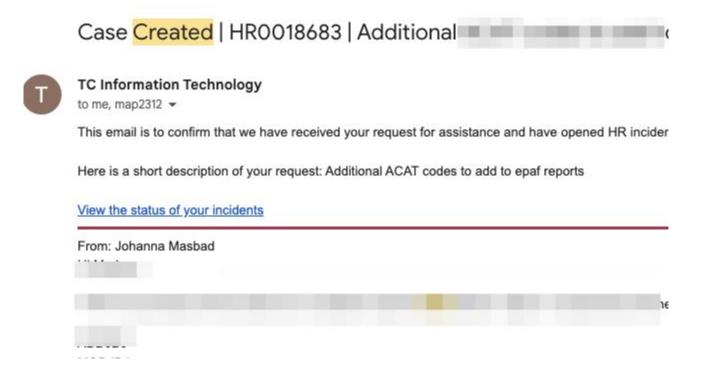


## Help!

Contact: HRISTeam@tc.edu or your HR Rep 😄

\*\* By emailing <a href="mailto:HRISTeam@tc.edu">HRISTeam@tc.edu</a> a ServiceNow ticket will automatically be created. You will receive a follow up email saying that a case has been created along with a case number.

Please correspond with us by replying to the email with the CASE NUMBER.





# Appendix: Required Inputs for Reappointment Letters

Part Time Instructor / Adjunct and Part Time Lecturer:

PROGRAM=xxxxx; (required)
COURSE=yyyyy; (required)

TITLE=xxxxxxx; (required for all Conversion Reappointment ePAFs)

ORLSPECIAL; (only for Organization and Leadership special enrollment text)

### Research / Teaching Assistant:

HOURS=xxxxx; (required)
POINTS=yyyyy; (required)
DETAILS=zzzzzz; (required)

TITLE=xxxxxxx; (required for all Conversion Reappointment ePAFs)

### **Course Assistant:**

HOURS=xxxx; (required)
COURSE=yyyyy; (required)

**DETAILS=zzzzzz**;

TITLE=xxxxxxxx; (required for all Conversion Reappointment ePAFs)