

#### Teachers College COLUMBIA UNIVERSITY

## Semester Reappointment ePAF Training

Semester Reappointments, Semester Conversions & Automated Reappointment Letters

# What We'll Cover Today

- New Pooled Position Numbers
- Reappointment ePAF Listing
- Conversion ePAFs
- Semester Based Reappointment ePAFs
- Defaulted Values and Defects
- Automated Reappointment Letters
- Faculty Reappointment ePAFs with Step Adjustment
- User Guides
- Questions?



# **New Pooled Position Numbers**

# Why The Change



Eliminate confusion around pooled position numbers



Streamline recruitment and hiring process



### **New Pooled Position Numbers**

**Previous State**: Pooled positions have different position numbers depending on index and account.

**Current State:** One pooled position number for each employee class (ie 999999 for all College Work Study employees).

#### Impacts

- PT Instructional, Student except CWS, Interim employees (temp hourly)
- JD templates
- Reappointments for SPRING Semester 2024
- Reappointment Letters

#### Decision

- New ePAFs for reappointments using pooled position number.
- Budget to deactivate/disable pooled position numbers that will not be used starting in Fiscal Year 2024



#### **New 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	84 - Course Assistant	C00000	Course Assistant	6462 - Course Assistants - P/T 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	89 - Administrative Fellows	F00000	Administrative Fellow	6412 - Administrative Fellows Part-Time
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**

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#### **Reappointment ePAF Listing**

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

А	В		С	C	E	<b>↓ </b> G	Н	К	L
TCID	= Employee Name	Ŧ	Position	₹ Su	<b>∓ E-(</b>	- Index		Use ePAF Approval Category:	Input Position and Suffix as:
T7	1		A00056	0	35	111941	6132	Reappt - Sem Based, Conversion PT Instructors, ADDJ10	Manually input: Position = A00000, Suffix = 00
T7	_/		A00056	1	35	111941	6139	Reappt - Sem Based, Conversion PT Instructors, ADDJ10	Manually input: Position = A00000, Suffix = 01
T7	,		A00056	3	35	111941	6132	Reappt - Sem Based, Conversion PT Instructors, ADDJ10	Manually input: Position = A00000, Suffix = 02
T7	1		B00120	0	81	111941	6152	Reappt - Sem Based, Conversion PT Instructors, ADDJ10	Manually input: Position = B00000, Suffix = 00
T7	,		B00120	1	81	111941	6159	Reappt - Sem Based, Conversion PT Instructors, ADDJ10	Manually input: Position = B00000, Suffix = 01
T7	/		E00000	0	48	546290	6252	Reappt - Year Round (Salaried)	Select previously held job where Position = E00000, Suffix = 00



### **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.

TCID	= Employee Name	Ŧ	Position	Ŧ	Suff \Xi	Index \Xi	JOB_TITLE =	ePAF ACAT =	ePAF Position 📼	ePAF Suffix =	
•		olas	R00000		1	544174	Research Assistant	Reappt - Sem Based, RA/TA	R00000	1	
								Review job duties. Use Reappt - Sem Based, Conversion RA/TA, ADDJB9. If a research assistiant use position R00000, if a teaching assistant use position			
·		olas	R00002		0	542613	Graduate Assistant (Econ & Ed) Fall 2020	RT0000.	see ePAF ACAT	0	
·			R00000		0	515130	Graduate Research Assistant	Reappt - Sem Based, RA/TA	R00000	0	
·			R00000		0	111801	Teaching Assistant: Measurement, Evalu	Reappt - Sem Based, Conversion RA/TA, ADDJB9	RT0000	0	
•			R00000		0	542738	Graduate Research Assistant	Reappt - Sem Based, RA/TA	R00000	0	
·			R00000		0	111011	Teaching Assistant	Reappt - Sem Based, Conversion RA/TA, ADDJB9	RT0000	0	
•			R00026		0	111915	Research Assistant	Reappt - Sem Based, Conversion RA/TA, ADDJB9	R00000	0	



# **Conversion ePAFs**

#### **Requirements of ePAFs**





#### **Conversion ePAFs**

ePAF Approval Category	User Guide	Account
Reappt - Sem Based, Conversion PT Instructors, ADDJ10**	Reappt - Sem Based, Conversion Adjunct Professor ADDJ10	6139
	Reappt - Sem Based, Conversion PT Instructors ADDJ10	6129
	Reappt - Sem Based, Conversion Fee Based Instructors ADDJ10	6159
Reappt - Sem Based, Conversion Comm. Teachers ADDJ11**	Reappt - Sem Based, Conversion Comm. Teachers ADDJ11	6149
Reappt - Sem Based, Conversion Course Assistant, ADDJB8**	Reappt - Sem Based, Conversion Course Assistant, ADDJB8	6469
Reappt - Sem Based, Conversion RA/TA, ADDJB9**	Reappt - Sem Based, Conversion Research Assistants, ADDJB9	6429
	Reappt – Sem. Based, Conversion Teaching Assistants, ADDJB9	6429



## **Conversion ePAFs**

- Use 05/16/2024 as the Query Date
- 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



# Defaulted Values and System Defects

#### **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)

	🗟 🌣 🕨 🗗 📑 🔳 🌘 Finish update 🗄
oup uat TC snow 🔨 tracker tix 🔇 B9	keyboard 🌘 MCC 🙆 Looker 🛛 👋 🗋 All Bookmarks
	🗱 💽 Hannah Masbad 2
	Begin Appointment - Invalid value for Organization.
	I Error(s) occurred.

Timesheet COA *	
1	
Timesheet Orgn	
	Q
Due to defect, please leave the Time	esheet Orgn field blank.
Job Change Reason *	
SUP, Supplemental	~
Supervisor TC ID/UNI *	
Supervisor TC ID/UNI *	
Supervisor TC ID/UNI *	

#### **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





# Defaulted Value: End Appointment End date = 01/01/1900

End Appointment, D00001-00 Doctoral Research Fellow, Last Paid Date: 02/28/2023



Some ePAFs will have 01/01/1900 defaulted into the date field. Update this field to the end date of the appointment/transaction.



#### Now a Demo!



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

ID *	
T31317009	
Klay Thompson	
Query Date *	
09/16/2023	
Approval Category *	
Reappt - Sem Based, Conversion Course Assistant, A	
Go	



# Step 2: Manually Input Position Number & Suffix





# **Step 3: Inputted Enterable Fields on ePAF**

Begin Date *		
05/16/2024		
Effective Date *		
05/16/2024		
Personnel Date *		
05/16/2024		
Contract Type		
S		
Timesheet COA		
1		
Timesheet Orgn Due to defect, leave the Timesheet Orgn field blank.		
	Q	

- 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.

ffective Da	te null								
09/16/2023	3								
COA	Index	Fund	C	Organization		Account		Program	
1 C	500000	Q 500000	Q	500000	a	6462	Q	6000	(



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

ourse = Basketball Analytics; ours = 8;
emaining Characters : 3908

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

#### Comments

Title = Course Assistant for Basketball Analytics;	Details
Course = Basketball Analytics; Hours = 8:	Name and ID
	Klay Thompson, T31317009
	Query Date
Remaining Characters : 3908	09/16/2023

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

Name and ID Transaction Klay Thompson, T31317009 164797 Query Date 09/16/2023

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**

Made by	Comment
Johanna J Masbad	Title = Course Assistant for Basketball Analytics; Course = Basket
Date	
08/01/2023 11:26 AM	
Add Comment	
Remaining Characters	: 4000

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.



# Semester Based Reappointment ePAFs

#### **Semester Based Reappointment ePAFs**

ePAF Approval Category	Account #
<u>Reappt - Sem Based, Course Assistant, CAAPPT</u>	6462
Reappt - Sem Based, Community Teacher, CMMUTY	6142
Reappt - Sem Based, RA/TA, GRDAPP	6422
Reappt - Sem Based, PT Instructional, PTIAPP	6122, 6132, 6152

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



### **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.



#### **Defaulted Values: End Date**

End Appointment, D00001-00 Doctoral Research Fellow, Last Paid Date: 02/28/2023

Job Status

т

Effective Date \*

Due to a known defect, do not use the datepicker tool. Type the date

01/01/1900	
Personnel Date *	
Due to a known defect, do not use the datepicker tool. Type th nt <u>o the field</u> .	ie date
01/01/1900	

Job Change Reason

EAP	
-----	--

Some ePAFs will have 01/01/1900 defaulted into the date field. <u>Update this field to</u> <u>the end date of the</u> <u>appointment/transaction</u>.



# Automated Reappointment Letters

#### 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**

- Make sure to review the Draft Letter before submitting the ePAF (ePAF needs to be saved). 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



Teachers College

# **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,



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

ïtle:	MASTER OF THE UNIVERSE	
Course:	AH123	
compensation:	\$5,000.00	
ay-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 (m@tc.colmbia.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, Faachers 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>



# User Guides

#### **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.

What you need to do	What you will see
STEP 1: Provide the ePAF parameters:	New EPAF Person Selection Dete.
a. Enter the TCID of the	Charact de basis to basis to submit as displayer, finter the Last Name and or Free Name, or enter an ID, or enter the SSM/SW/TM. Select dis A personn Up may be aveid as a writizerd.
in TCID in caps).	First Name ID SSW5/N/TIN
b. Enter the Query Date. <u>The</u> <u>Query Date should equal</u>	Enter or Generate New ID
the appointment effective date.	*Indicases a required field. Liner an ID, select the link to senth for an ID, or generate an ID. Unar the Query Date and select the Approval Galagory Select Do.
<ul> <li>Select Reappt – Year Round (Salaried) in the approval</li> </ul>	0 * Conce TCID is entered, name will provide
d. Click Go.	Query Date *
	Reapt - their Reard Galaxield, RIAP1 V C
	d

#### 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
- Job Termination



# **Questions?**

## Help!

#### Contact: <u>HRISTeam@tc.edu</u> or your HR Rep 😄

\*\* By emailing <u>HRISTeam@tc.edu</u> 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.

#### Case Created | HR0018683 | Additional



#### **TC Information Technology**

to me, map2312 💌

This email is to confirm that we have received your request for assistance and have opened HR incider

Here is a short description of your request: Additional ACAT codes to add to epaf reports

#### View the status of your incidents





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

#### **Course Assistant:**

HOURS=xxxxx;	(required)
COURSE=yyyyy;	(required)
DETAILS=zzzzz;	
TITLE=xxxxxxx;	(required for all Conversion Reappointment ePAFs)

