Reappointment User Documentation

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Reappointment Process

The purpose of the Reappointment System is to create a mass pay change process to supplement the existing Personnel Action (PA Form) paper procedures. A web-based reappointment listing is created on-line, using database developed by Informatics in ITaP. The on-line reappointment listing is created for the purpose of providing update and approval capabilities. The listing consists of the monthly-paid AY Limited Term Lecturers, graduate student staff and student administrative/professional staff, excluding fellowships.

Background Information

Timing of the reappointment process

The Reappointment System will be used several times each year.

1. In July, the system will list the fiscal-year graduate employees reflecting current information based on staging date, with the date monitoring expected term date reflecting the end of June.
2. In August, the system will list the academic-year graduate employees and limited term lecturers and will reflect current information based on staging date, with the date monitoring expected term date reflecting the end of the spring semester.
3. Throughout the year, the system will be used to apply mass pay changes for different departments across the University.

<table>
<thead>
<tr>
<th>Run Date</th>
<th>Staff Type</th>
<th>Effective date</th>
<th>End Date</th>
<th>Expected Term Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>FY - Grad</td>
<td>7/1/xxxx*</td>
<td>12/31/9999</td>
<td>6/30/xxxx*</td>
</tr>
<tr>
<td>August</td>
<td>AY - Grad/LTL</td>
<td>Semester Begin date</td>
<td>12/31/9999</td>
<td>Semester End Date</td>
</tr>
<tr>
<td></td>
<td>HFS temps</td>
<td>Date varies</td>
<td>12/31/9999</td>
<td>Semester End Date</td>
</tr>
<tr>
<td>December</td>
<td>HFS Students</td>
<td>Semester Begin date</td>
<td>12/31/9999</td>
<td>Semester End Date</td>
</tr>
<tr>
<td>January</td>
<td>AY – LTL</td>
<td>Semester Begin date</td>
<td>12/31/9999</td>
<td>Semester End Date</td>
</tr>
<tr>
<td></td>
<td>CES budget increases</td>
<td>1/1/xxxx*</td>
<td>12/31/9999</td>
<td>12/31/xxxx*</td>
</tr>
<tr>
<td>June</td>
<td>HFS Students</td>
<td>Pay period begin date of 1st Aug pay*</td>
<td>12/31/9999</td>
<td>Semester End Date</td>
</tr>
</tbody>
</table>

* xxxx = appropriate year
Access to the Reappointment System

To request new user access to the reappointment system, ask your Business Manager to send email to Heather Underwood, hunderwo@purdue.edu AND Linda Tripp, ltripp@purdue.edu, and include the following information: user name, alias, and organizational unit number(s).

To remove access to the reappointment system and/or specific organizational unit(s) due to staffing changes, send user name and list of organizational unit(s) to Heather and Linda.

The URL for the reappointment system is:

https://www2.itap.purdue.edu/onepurdue/reapp

The login screen will appear and the career account and password are used to gain access to the system.

Once the career account ID and password are entered, press Login.
Navigate the Employee List Screen

User assigned organizational units will appear. Employees are displayed alphabetically.

Select One Organization Unit

To review one organizational unit at a time -
1. Click the drop down beside Select unit to review and select the desired org
2. Click View Unit Data
ONLY employees in that organization unit will appear on the list.
**Download the list to Excel**

The list of employee’s and their detail information can be downloaded to an Excel spreadsheet. There are at least two purposes for this -

1) Can be produced prior to any edits being made as a worksheet and
2) The list needs to be downloaded once all edits are completed within the system and routed for approval.

Go to the Download drop down and select either all departments or the one department you want to download. Press the **Download CSV File** button.

An Excel spreadsheet format of the data will appear. You will need to adjust the size of the columns in order to see all the data. You may save this spreadsheet on your LAN or print it off for further processing/approvals.
Edit the Base Pay Data

When the contracts have been determined then the updates to the employee’s base pay can be made by editing the data.

When you press the edit button for an individual, a detail page will appear.
Navigation of the Employee Detail Screen

There are three titles in blue across the top of the screen.

1. If you click the <<Last Person you will go to the previous person without making any changes. (note - this does not appear on the first record on the list)
2. If you click on the Grad/Lecturer Reappointment Home you will return to the list of all employees
3. If you click the Next Person>> you will go to the next person without making any changes. (note - this does not appear on the last record on the list)

The information on the left side of the screen shows the current information on the employee. This data is not modifiable.

The information inside the box on the right side of the screen is modifiable.

1. The status box shows actions that can be taken on the employee. This is an explanation of each status when the update takes place in the system.

**Monthly reappointment logic:**

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) No Action</td>
<td>The system will establish a reappt action (IT0000), set the base pay record (IT0008) to 0.00 so no pay will be paid out on this appointment. No monitor date is set (IT0019). Contract begin date is used as effective date. The Action Required report will indicate action needs to be taken on this appointment.</td>
</tr>
<tr>
<td>(2) Continue no Change</td>
<td>The system will establish a reappt action (IT0000), and the base pay record (IT0008) will update but remain with current values. The contract expiry date will be on date monitoring (IT0019). Contract begin date is used as effective date.</td>
</tr>
<tr>
<td>(3) Continue with Change</td>
<td>The system will establish a reappt action (IT0000), set the base pay record (IT0008) to the proposed values submitted. The contract expiry date will be on date monitoring (IT0019). Contract begin date is used as effective date.</td>
</tr>
<tr>
<td>(4) Transfer</td>
<td>The system will establish a reappt action (IT0000), set the base pay record (IT0008) to 0.00 so no pay will be paid out on this appointment. No monitor date will be set (IT0019). Contract begin date is used as effective date. The appointment will not be transferred until the paperwork is received. The Action Required report will indicate action needs to be taken on this appointment.</td>
</tr>
<tr>
<td>(5) Separation</td>
<td>The system will establish a reappt action (IT0000), set the base pay record (IT0008) to 0.00 so no pay will be paid out on this appointment. No monitor date will be set (IT0019). Separation date is used as effective date so enter the day following the last day in pay status. The appointment will not be separated until the approved spreadsheet is received. The Action Required report will indicate action needs to be taken on this appointment.</td>
</tr>
</tbody>
</table>
**Bi-Weekly reappointment processing logic:**

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) No Action</td>
<td>The system will establish a reappt action (IT0000), the base pay record (IT0008) will remain as current rate of pay. No monitor date will be set (IT0019). Contract begin date is used as effective date.</td>
</tr>
<tr>
<td>(2) Continue no Change</td>
<td>The system will establish a reappt action (IT0000), and the base pay record (IT0008) will update but remain with current values. The contract expiry date will be on date monitoring (IT0019). Contract begin date is used as effective date.</td>
</tr>
<tr>
<td>(3) Continue with Change</td>
<td>The system will establish a reappt action (IT0000); set the base pay record (IT0008) to the proposed values submitted. The contract expiry date will be on date monitoring (IT0019). Contract begin date is used as effective date.</td>
</tr>
<tr>
<td>(4) Transfer</td>
<td>The system will establish a reappt action (IT0000), the base pay record (IT0008) will remain as current rate of pay. No monitor date will be set (IT0019). Contract begin date is used as effective date. The appointment will not be transferred until the paperwork is received in SSC.</td>
</tr>
<tr>
<td>(5) Separation</td>
<td>The system will establish a reappt action (IT0000), the base pay record (IT0008) will remain as current rate of pay. No monitor date will be set (IT0019). Separation date is used as effective date. If separation date is not entered, the contract date will default. The appointment will not be separated until the paperwork is received in PASC.</td>
</tr>
</tbody>
</table>

2. The **Proposed CUL** can be changed to represent the new CUL or can remain the same.
3. The **Proposed Monthly rate** can be changed to represent the new amount of salary the individual will be paid each month, or the hourly rate of pay.
4. The **Contract Begin Date** will default based on the appointment (i.e. 7/1/xx for FY and 8/xx/xx for AY). **DO NOT CHANGE THIS DATE!!!**
5. The **Anticipated Contract Expiry Date** will default to 6/30/xx for FY appointments and 5/xx/xx for AY appointments. This field (IT0019) will be used to monitor the end of the contract period. **DO NOT CHANGE THIS DATE!!! This does not stop pay; only use this date to monitor a reminder the contract is about to expire.**
6. **Separation Date**, if entered in conjunction with the Separation status, will be used as the effective date to zero any base pay. PASC will process separation action from the spreadsheets received from the departments.
7. Once all changes are made for this individual, press **Submit**.
8. When this is done the next employee’s detail screen will appear. Continue until all employees are processed.

NOTE: If a status has not been set for an appointment, no changes will take place during the update process. If a record is not changed and the submit button is not pressed, no changes will take place during the update process.
When you return to the Employee list page, you will see that the Status fields hold the value of the status set while editing the detail records. This will show you at a glance what employees have been processed and what action is being taken on them.

**Approvals**

Once all changes have been completed, a download of the data will need to be printed off and routed for approvals. These approvals are obtained at the department, school and Payroll Appointment Services (PASC) level.

Select the department to be downloaded from the dropdown list. Click on the Download CSV File button. Send this list along with approvals to the PASC. A sample approval form can be found on the B@P People/Appointment Changes page under Resources/ Sample Reappointment Approval Document.

Instructions on the desired layout of the downloaded file will be provided with each opening notice of the reappointment application.
**Reporting**

During the upload of this data into SAP there are a series of edits to make sure the data is clean enough for loading. A report will list the results of all processing activity. Users will be able to utilize the report functionality to manipulate the report as needed (such as re-sorting, viewing only successful transactions, viewing only errors, etc.).

The reports can be found on the B@P People/Appointment Changes page under Reports.

The reports include all fields for the “current” values as well as the “proposed” values for Annual Salary, FTW, Period Rate, and Hourly Rate. A message field will indicate the status of that particular record - if it failed a check, if the Infotypes were successfully updated, etc.

During the process, the Simulation upload will be run periodically. Check the **Reappointment-Simulation report** to see if your records seem to be OK for updating.

Once all data has been entered into the Reappointment system, the data will be uploaded into SAP. Once that has completed, a **Reappointment-Update report** will be available. Any records that did not update as expected will require a PA form to the PASC.

The third report is the **Reappointment-Action Required report**. This is a listing of all records where the infotype 8 was set to zero (0.00). These records need some type of PA action. These include No Action, Transfer, and Separation status records.
Retraction Error Messages/Warnings

During the update of the Reappointment file to SAP, some errors may occur if the appointment has changed since the data was pulled for the reappointment process. If this happens, an error list will be generated that will indicate an error has occurred. The possible errors are:

- **WARNING:** Input file Proposed CUL total > 50%.
  - The message is a warning – the change will process in SAP. A discussion with the other org unit(s) that employ this individual to determine where the CUL change needs to occur. A PA Form – Change in Pay will need to be completed to adjust the CUL on one or more of the appointments.
- **ERROR:** Future dated Infotype 0008 record exists.
- **ERROR:** Data mismatch on Position, Input file = 00003652, Match file = 00003678
- **ERROR:** Data mismatch on Organizational Unit, Input file = 00000051, Match file = 00000155
- **ERROR:** Data mismatch on Annual Salary, Input file = 29000.00, Match file = 30000.00
- **ERROR:** Data mismatch on Employee Status, Input file = 3, Match file = 0
- **ERROR:** At least one validation failed – SAP NOT updated

- **“Change Ind” field on the Reappointment-Update Report**
  - 1 = No Action
  - 2 = Continue No Change
  - 3 = Continue With Change
  - 4 = Transfer
  - 5 = Separation

Sample Processing Messages

Note: Most records will contain 3 lines of data.

1. Example of the messages for a successful update.
   - OK: Infotype 0000 updated
   - OK: Infotype 0008 updated
   - OK: infotype 0019 updated

2. Example of the messages for an unsuccessful update.
   - ERROR: Data mismatch on Position, Input file = 00004185, Match file = 99999999
   - ERROR: Data mismatch on Employee Status, Input file = 3, Match file = 0
   - ERROR: At least one validation failed – SAP NOT updated

3. Example of the messages for a successful update with a warning.
   - WARNING: Input file Proposed CUL total > 50%
   - OK: Infotype 0000 updated
   - OK: Infotype 0008 updated

4. Example of the messages for a record not Processed due to no update (Org Unit did not edit and submit the record in the Reappointment Application.)
   - ERROR: This record has not been updated in the Reappointment database 90017876
   - ERROR: At least one validation failed – SAP NOT updated