Job Aid for Joint Appointment Job Change

Description

- This job aid is intended to guide you through the online process for a Joint Appointment Job Change transaction to change a Tufts employee job information and modify position management. This will be initiated by an Approved Submitter.

Key Steps/Activities to be performed

1. The Approved Submitter Logs into PeopleSoft and clicks on the submit request tile from their landing page.
2. The Submitter selects the Joint Appointment – Job Change from the left-hand side navigation, which will begin the transaction and opens a window to allow the submitter to search for an employee.

3. You can search for the employee by name, employee id, position number or department.

4. Based on the search criteria, a list of employees will appear that the submitter has security access to. In the example below, the search was for "Simpson".
5. After selecting the employee from the list, the submitter will answer 5 questions about the changes they would like to make. If the question is answered “YES”, the submitter will be allowed to change the field. The questions are:
   a. Are you changing the person’s department?
   b. Are you changing the person’s location?
   c. Are you changing the person’s supervisor?
   d. Are you changing the person’s FTE/Hours?
   e. Are you changing the person’s title?

6. In our example, we have entered “YES” to all questions. This will allow the administrator to change the following fields
   a. Transaction Date – Enter the date the transaction is effective. If any part of the Transaction is Retroactive, please contact TSS prior to proceeding.
   b. Department – Enter the person’s new department
   c. Location – Enter the person’s new location
   d. Standard Hours – Enter the number of hours the employee will work each week. Note: The FTE will update automatically.
   e. Full/Part Time – This will update based on the standard hours but can be updated
   f. Reports To – Search for the position or manager that the person will be reporting to. Note: Manager Name will update automatically.
   g. Position Title – Enter the person’s new position title.

When completed the user will click on the NEXT button.
7. The submitter will have a chance to review the changes that were made and add comments that they can reference in the future and will be included in the workflow transaction. After reviewing the transaction, the submitter will click on the submit button.
8. After the transaction is submitted, the submitter will receive a message that the transaction was submitted for approval. They can also view the approval workflow chain with a pending status.

All required approvals will appear in the Approval Chain. Upon completion of the Approval Chain, certain roles will be notified. The required approvals and the notified roles will vary based on the type of employee as shown below.

<table>
<thead>
<tr>
<th>EmployeeType</th>
<th>Faculty</th>
<th>Staff (postdoc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approvers</td>
<td>OFA</td>
<td>OFA</td>
</tr>
<tr>
<td></td>
<td>OVPR Post-Award (if employed by Tufts University)</td>
<td>OVPR Post-Award (if employed by Tufts University)</td>
</tr>
<tr>
<td>Notified</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
9. The approver will receive an email that a transaction is waiting to be approved and they will also see the transaction in the pending approvals tile.
10. The approver should then select the transaction from the list. They can review the changes and comments before denying or approving the transaction. Once the final approver has approved the transaction, the employee’s job data information will reflect the changes.
Your request was approved by the approver below.

Approver Name: ___________
Transaction Name: Joint Appointment-Job Change Employee Name: Homer Simpson Employee Id: 1031846

To view the status of this request, go to:


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