

Tufts Support Services

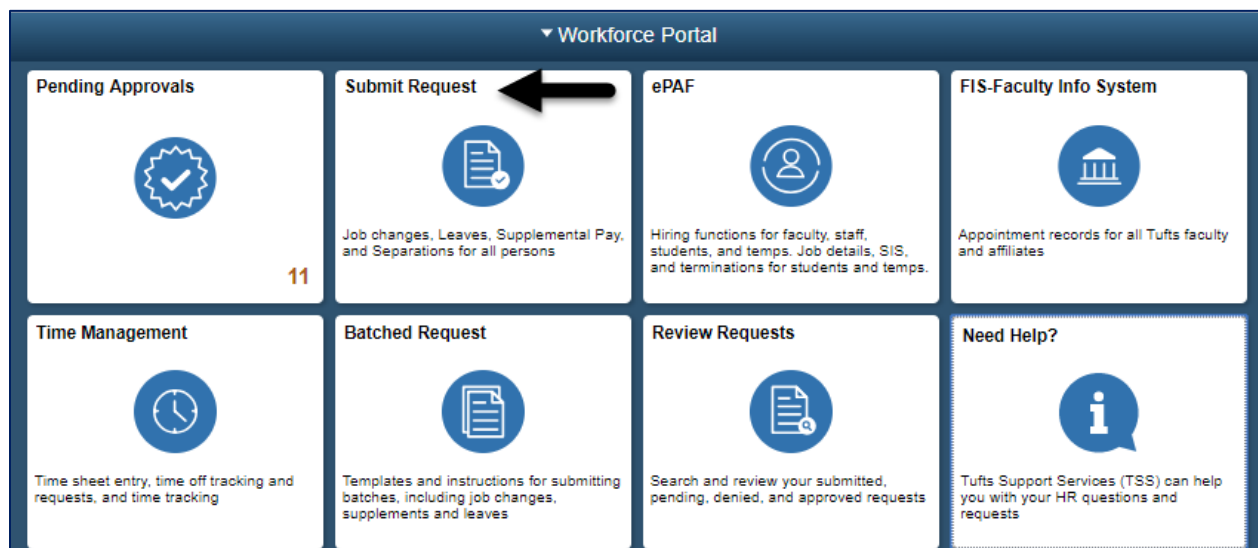
Job Aid for Joint Appointment Job Change

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.



- 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.

Submit Requests - HRBP

Update a person's Department, Supervisor, Location, Title, and/or FTE/Hours.
Note: When submitting a change for both FTE/Hours and Pay Rate with the same effective date, both requests must be submitted at the same time. After submission, the FTE/Hours request must be approved and committed before final approval can be made for the Pay Rate request.

Change Pay and Labor
 Update a person's Pay Rate (either semi-monthly or hourly), Labor Distribution, and/or Timekeep.

Make Timekeeper
 Authorize an employee as a Timekeeper and designate Timekeepers for an authorized Timekeeper.

Supplemental Pay
 One-time and periodic payments for all Tufts employees.

Leave of Absence
 Including Non-Academic Leave and Return from Leave.

Separation - Voluntary
 Termination reasons including Accepted Other Employment, Relocation, Resignation, Return to School, and Retired.

Separation - Involuntary
 Termination reasons including Job Abandonment, Job Protection Expired, Not Legally Eligible to Work, Contract Expiration, End of Limited Employment, and Death.

Separation - Layoff
 Termination reasons including Expiration of Grant Funding and Reorganization.

Joint Appointment - Job Change
 Create a Joint Appointment for faculty or postdocs either employed by Tufts University or employed elsewhere.

Joint Appointment - Pay & Labor
 Create a Joint Appointment for faculty or postdocs either employed by Tufts University or employed elsewhere.

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

Submit Requests - HRBP **Joint Appointment - Job Change**

Search Options

Search for Employees, Faculty, POI's or Students

- 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".

Submit Requests - HRBP **Joint Appointment - Job Change**

Search Options

Search for Employees, Faculty, POI's or Students

May Devers

Select Employee 5 rows

Name / Title / ID - Record	Status / Type
Assistant Professor 1027795 - 0	Active Employee
Homer Simpson Associate Professor 1031846 - 0	Active Employee
Affiliate 1153367 - 1	Active Contingent Worker

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:
- Are you changing the person’s department?
 - Are you changing the person’s location?
 - Are you changing the person’s supervisor?
 - Are you changing the person’s FTE/Hours?
 - Are you changing the person’s title?

The screenshot shows a web interface for 'Submit Requests - HRBP' with the title 'Joint Appointment - Job Change'. The user is logged in as 'Homer Simpson', an Associate Professor. The page is titled 'Questionnaire' and contains five questions, each with a 'No' radio button selected:

- Are you changing the person's department? No
- Are you changing the person's location? No
- Are you changing the person's supervisor? No
- Are you changing the person's FTE/Hours? No
- Are you changing the person's title? No

A green 'Next >' button is located in the top right corner of the questionnaire area.

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

When completed the user will click on the NEXT button.

✕ Exit
Joint Appointment - Job Change

Homer Simpson
Associate Professor

1
2

Job Detail
Review and Submit

Work and Job Information

*Transaction Date:

This employee is in a position controlled by Position Management. Position Data will be updated as a result of this transaction.

New Information

*Department ●

*Location ●

Standard Hours ●

FTE ●

*Full/Part Time ●

Reports To ●

Manager Name ● Marge Simpson

Position Title

Current Information

Urban & Enviro Policy & Plan A310001

UEP-97 Talbot Ave M147

35.00

1.000000

Full-Time

Associate Professor & Chair 00002996

John Doe

Associate Professor 00007358

● Changes Made
* Required Field

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.

✕ Exit
Joint Appointment - Job Change

Homer Simpson
Associate Professor

1
2

Job Detail
Review and Submit

Review and Submit

Transaction Date: 05/07/2019

Reason: Position Data Update

New Information

Department ●

Location ●

Standard Hours ●

FTE ●

Full/Part Time ●

Reports To ●

Manager Name ● Marge Simpson

Position Title

Current Information

Urban & Enviro Policy & Plan A310001

UEP-97 Talbot Ave M147

35.00

1.000000

Full-Time

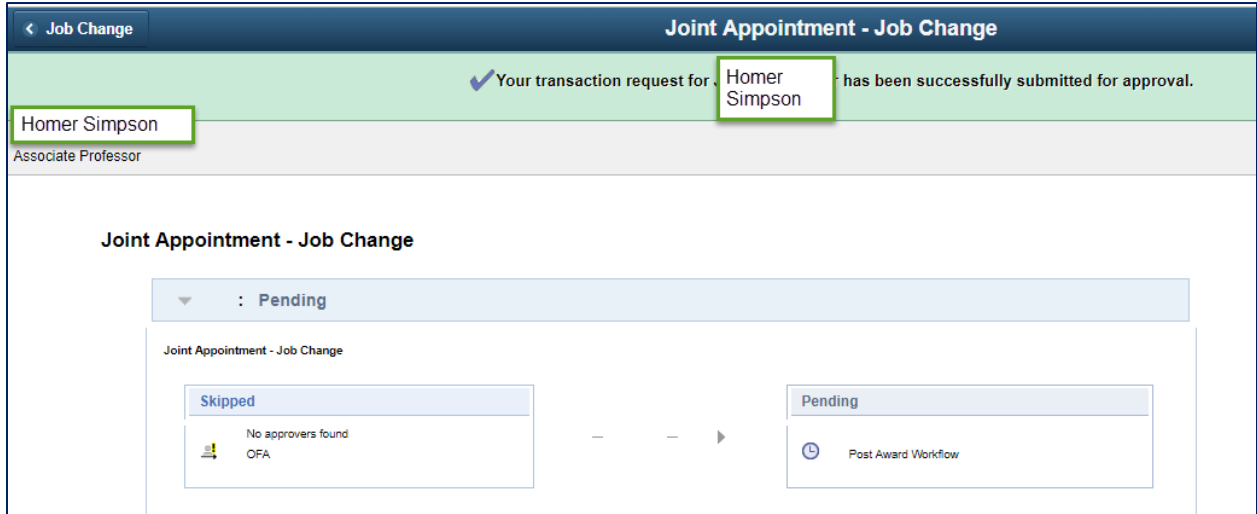
Associate Professor & Chair 00002996

John Doe

Associate Professor 00007358

Comments

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.

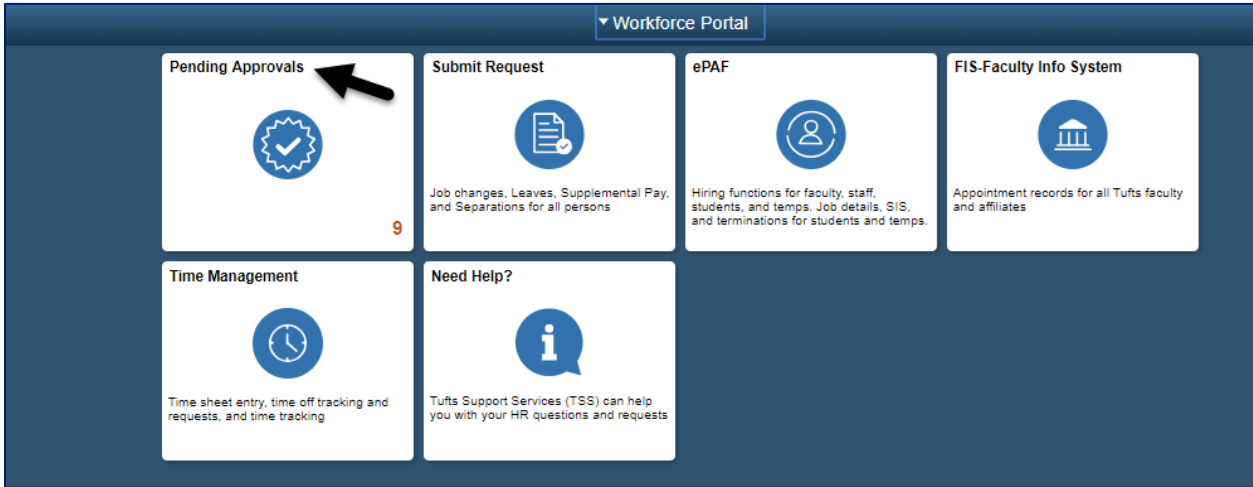


All required approvals will appear in the Approval Chain. Upon completion of the Approval Chain, certain roles will be notified. The required approvals and the notified roles will vary based on the type of employee as shown below.

EmployeeType	Faculty	Staff (postdoc)
Approvers	OFA OVPR Post-Award (if employed by Tufts University)	OFA OVPR Post-Award (if employed by Tufts University)
Notified		



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.



Reply Reply All Forward
 Mon 5/6/2019 3:26 PM
 eservenotifications@tufts.edu
 eServeRequest Submitted: Transfer to Job - Homer Simpson (1026543)

To: @tufts.edu

Your request was successfully submitted. This request requires approval(s) before it will be saved to eServe. You will receive notifications when this request is approved or denied.

Request Type: Transfer to Job
 Person Name: Homer (1026543)

To view request details and track approval status go to:
https://hrweb-test-05.uit.tufts.edu:10310/psp/HCMSTST/EMPLOYEE/HRMS/c/EL_MANAGER_FLHR_MSS_CT_VW.GBL?Page=HR_MSS_CT_EE&Action=U&EMPLID=1026543&EMPL_RCD=0&ACTION_DT_SS=2019-05-06&EFFSEQ=1&EXTRA_PROCESSID=TFTH_TRANSFER_JOB&PROCESSID=TFTH_TRANSFER_JOB

Need Help? Contact Tufts Support Services
 617-627-7000
<mailto:tss@tufts.edu>
https://tuftstss.force.com/apex/Log_A_Case
<http://tss.tufts.edu/>

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.

Pending Approvals

View By: Type

All	25
Change to Job	3
Joint Appointment-Job Cha	1
Joint Appointment-Salary	1

Joint Appointment-Job Change		Reason - Position Data Update	1 row
Joint Appointment-Job Change Homer Simpson 1031846	05/07/19		Routed 05/07/2019 >

← Pending Approvals
Home Search Help
Joint Appointment-Job Change

Delegated by Deena Pineo
Approve Deny

Summary
Homer Simpson Position Data Update
1031846 05/07/19

Proposed Changes

Description	After Approval	Before Approval
Department	Visual and Critical Studies - A120001	Urban & Enviro Policy & Plan - A310001
Location Code	Medical & Vet-136 Harrison Ave - B003	UEP-97 Talbot Ave - M147
Full/Part Time	Part-Time	Full-Time
Standard Hours	20	35
Reports To	Dir Admin & Finance - 00001009	Associate Professor & Chair - 00002996
Manager Name	Marge Simpson	Joe Smith
Supervisor	Jane Doe	

Labor Distribution
 New Labor Dist Current Labor Dist

Reply Reply All Forward

Tue 5/7/2019 2:27 PM
David Cuddihy
David Cuddihy
Informational - Joint Appointment-Job Change - Homer Simpson Approved by May Devers

To: @tufts.edu

We removed extra line breaks from this message.

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:

https://hrweb-test-05.uit.tufts.edu:10310/psp/HCMSTST/EMPLOYEE/HRMS/c/EL_MANAGER_FL.HR_MSS_CT_APPR.GBL?Page=HR_MSS_CT_APPR&Action=U&EMPLID=1031846&EMPL_RCD=0&ACTION_DT_SS=2019-05-07&EFFSEQ=1&EXTRA_PROCESSID=TFTH_JOB_JOINT_APPT&PROCESSID=TFTH_JOB_JOINT_APPT

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

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