

Setup Dual Appointment - HOME Institution

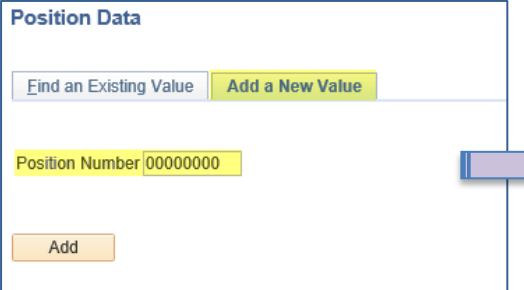
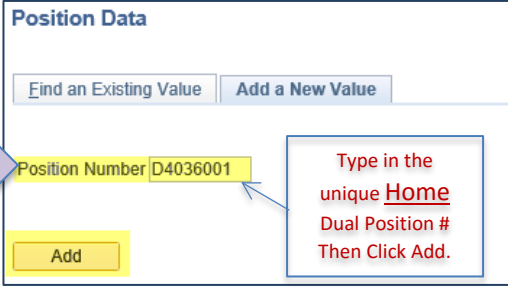

INTRODUCTION

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| Description | This process describes the steps necessary to create a new Dual Appointment Employment Instance at the Home Institution. |
| Conditions | <ul style="list-style-type: none"> • Coordinate Dual Appointment process with the Dual Appointment Coordinator. • A Position request has been approved and Budgeted. • The Home Department for the Position is 'Active' in the Department Table and is included in the Department Security Tree. • Notify Commitment Accounting after Position has been created. • Obtain the following information: <ul style="list-style-type: none"> ○ Requesting Institution's two-digit Institution ID ○ Appointment effective date ○ HOME Position this Appointment will Report to ○ Reg/Temp Status ○ Full/Part Status ○ Standard Hours ○ FTE ○ Pay Group ○ Earnings Code – (Use for JED Setup) ○ Compensation amount ○ Job Code ○ Department |
| Source Documents | Dual Appointment Agreement; Dual Appointment Coordinator. |
| Output Information | Dual Appointment Position and Employment Instance. |



| PROCEDURES | |
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| SECTION I | Create Dual Appointment Position |
| PATH | Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info > Add a New Value |
| Dual Appointment Position Naming Convention | <p>DXXYY### = D4036001</p> <ul style="list-style-type: none"> • D = Dual Appointment Indicator • XX = <u>Your</u> two-digit Institution Number • YY = <u>Other</u> Institution's two-digit Institution Number • ### = Sequential Number |
| STEP 1.1 - Define | Define Dual Appointment HOME Position Number |
| | <ul style="list-style-type: none"> • D4036001 (Example) <ul style="list-style-type: none"> ○ D = Dual Appointment Indicator ○ 40 = HOME – GA Gwinnett College (400) ○ 36 = REQUESTING GA College & State University (360) ○ 001 = 1st Sequential Number |
| STEP 1.2 - Search | Search Position Data to Identify Next Sequence # |
| | <ul style="list-style-type: none"> • Search for the beginning characters of the proposed Position Number: (i.e. 'D4036') <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Position Data</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p style="text-align: center;"> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p>▼ Search Criteria</p> <p style="background-color: #ffff00; padding: 2px;">Position Number begins with ▼ D4036 x</p> <p style="text-align: center;"> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/> </p> <p style="background-color: #ffff00; padding: 2px;">No matching values were found.</p> </div> <ul style="list-style-type: none"> • If no match is found, begin the sequence at '001' • If a match is found, increment last sequence by '1' |



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| STEP 1.3 - Add | Add Dual Appointment Position | |
| | <ul style="list-style-type: none"> The system will automatically populate the Position Number field with 00000000. Replace this number with the Dual Position number you defined in the Step-1 above. Complete Position Date Setup. | |
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| Update or Verify Fields – (Description / Specific Information / Budget and Incumbents) | | |
| 1. Effective Date 2. Reason 3. Business Unit (default) 4. Job Code 5. Reg/Temp 6. Full/Part | 7. Official Title 8. Reg Region (default) 9. Department 10. Company 11. Location 12. Reports To | 13. Standard Hours 14. Work Period 15. Max Head Count 16. Budgeted Position 17. FTE 18. Adds to FTE Actual Count |
| | Save Position Data Updates  | |
| STEP 1.4 - Update | Pay Group Information | |
| | Navigate to the Position Data - Job Information Tab Click on the ' Paygroup Info ' Link and update the following two fields: Effective Date: (Set Equal to Position Effective Date) Pay Group: (Set the Appropriate Pay Group for Position) Click ' Save ' to save the Position Pay Group Update. | |
| STEP 1.5 - Action | Navigate to the Position Data Page and Save the Position Record again. | |



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| SECTION II | Add New Employment Instance |
| PATH | Workforce Administration > Personal Information > Organizational Relationships > Add New Employment Instance |
| STEP 2.1 – Verify | Confirm that Position has been Funded Before STEP 2.2 Begins |
| STEP 2.2 – Add | New Employment Instance |
| | <ul style="list-style-type: none"> • Input the Employee Number • Verify that the Empl Record number updates correctly • Click 'Add Relationship' <div data-bbox="583 653 1216 909" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>New Employment Instance</p> <p>Empl ID <input type="text" value="1000215"/> <input type="button" value="🔍"/></p> <p>Empl Record <input type="text" value="1"/></p> <p><input type="button" value="Add Relationship"/></p> </div> |
| | <ul style="list-style-type: none"> • Update Effective Date: • Action = HIRE • Reason = New Employment Instance • Job Indicator = Secondary • Input the Dual Appointment Position Number Added in SECTION 1 > STEP 1.3 |
| | <div data-bbox="253 1115 1365 1530" style="border: 1px solid black; padding: 5px;"> <p>< Add Employment Instance</p> <p>Work Location Job Information Payroll Salary Plan Compensation</p> <p>Roll, Cinnamon (Cinnamon) Empl ID 1000215 Employee Empl Record 1</p> <p>Work Location <input type="button" value="🔍"/> Find First 1 of 1 Last <input type="button" value="Go To Row"/> <input type="button" value="+"/> <input type="button" value="-"/></p> <p>*Effective Date <input type="text" value="06/01/2017"/> <input type="button" value="📅"/></p> <p>Effective Sequence <input type="text" value="0"/> *Action <input type="text" value="Hire"/></p> <p>HR Status Active Reason <input type="text" value="New Employment Instance"/> <input type="button" value="🔍"/></p> <p>Payroll Status Active *Job Indicator <input type="text" value="Secondary Job"/></p> <p><input type="button" value="Calculate Status and Dates"/> Current <input type="button" value="📄"/></p> <p>Position Number <input type="text" value="D4036001"/> <input type="button" value="🔍"/> <input type="button" value="Override Position Data"/></p> </div> |
| STEP 2.3 – Update | Work Location Tab |
| STEP 2.4 – Update | Job Information Tab |
| STEP 2.5 - Update | Payroll Tab |
| STEP 2.6 - Update | Compensation Tab |
| STEP 2.7 - Update | Benefits Program Participation Tab |

