

Electronic Appointment Process Update June 13, 2009

We're close to the one-year anniversary of the electronic appointment process (E-Appoint). I appreciate all of you who have called during the past few months with comments, questions and suggestions. You've helped us fine-tune the system and adjust our administrative processes to adapt to this electronic environment.

I want to give you a brief summary of the items we've changed or enhanced since we last met for training in January. Here's a summary of the changes that we've made – and changes that are in the works.

1. There is now a **"Save Draft"** option in the Unclassified Appointment Process. Here's how it works: The contact person starts the request and selects 'Save Draft.' The chair/supervisor can then review the Appoint Request module, make changes as needed, and submit. Note that the contact person or supervisor must click "Submit" so that the electronic request can get in the approval process. When the "Save Draft" option is selected, the Appoint Request will appear on the Power Grid, but there will not be any information in the Power Grid approval columns until the request is submitted.

Note that the "Save Draft" option is only available to the initiator of the request. We will also modify the Unclassified Search process to include the "Save Draft" option.

2. We will be revising the **email messages** that you receive when it is time for you to approve, when an action has been approved by the final person in the approval chain, and when an action that you have initiated or approved has been canceled or disapproved by someone higher in the approval chain. These messages will include a link that will take you directly to the request module if you are logged into GUS, or to the GUS login and then to the request module.

You've probably figured out that you can manage your E-Appoint actions directly from the Power Grid and you don't need to use the email links. If you want to "eliminate" the E-Appoint emails, you can set up filters in your email. Contact your computer tech or the OIS help desk (x. 4600) for assistance.

As a reminder, you need to use Mozilla Firefox when working in the E-Appoint process. If you click on a link in an email and it does not use Firefox for the Internet browser, here's how you can change the default browser to Firefox. You can also contact your computer tech or the OIS help desk for assistance.

- Open Firefox.
- Select Tools (at the top)
- Select Options
- Select Advanced
- Select General
- Look for "System Defaults." Check the box that reads "Always check to see if Firefox is the default browser on startup."
- Click "Okay"

3. We have enhanced information on the **View Position Requests, View Search Requests and View Appoint/Fill Requests**. We've also revised the **Cancel/Disapproved list**. The columns on these sites are also sortable.

On the View Search Requests list, we've also added an "Appoint Xref" column that will contain the tracking number of the Appoint Request that has been started. This way, you can easily identify the outstanding Search Requests (those that have not had a corresponding Appoint Request started).

You can also download each of these lists into an Excel file.

4. We have enhanced the **Spoken English Assessment form**. We've added the following
 - o Radio buttons for each assessor to click either "Agree" or "Disagree"
 - o An "Update Changes" box that must be clicked to submit the action
 - o A box for each assessor to add comments

We are also tracking changes and comments in the History. The initiator can change assessors, if needed. And if an assessor needs the link to do the Spoken English Assessment, the initiator can access the Spoken English Assessment form, copy the address that starts "https//..." and send the address to the assessor in an email. This link will take the assessor to the Spoken English Assessment form.

5. We have fine-tuned the process for **Summer School Appointments for Benefits-Eligible positions**. Unclassified employees with Appointment types of CN (Continuing Non-Tenure Earning) or TM (Temporary) must have an electronic Search and Appoint for summer school assignments. TM's will also need an electronic Search and Appoint for the new academic year. Here's some tips to make this go smoother:

- o When appointing a CN or TM for the summer, use their regular Academic Year position (most are 100%) and leave the percent time as is. Do not change the percent time to a lower percentage, even though the individual will teach less than the full-time academic year or semester load.
- o For a TM, start the Search and Appoint Request for the Summer Sessions first. Then, when HRS has appointed the individual for the summer and the summer request is off of the Power Grid, you can start the Search and Appoint Request for the new Academic Year to reappoint the individual.
- o All summer appointments for a CN or TM who is eligible for benefits must be on one electronic form initiated by the employee's normal department. If a TM or CN who is eligible for benefits is appointed to teach in more than one department, the contact person of their regular department will need to complete the Search and Appoint requests with the total amount to pay and the appropriate funding sources.

NOTE: If a TM who is not eligible for benefits (20% position) has 2 or more appointments from different departments, each department can do a Search Request and Appoint Request for the individual. If a department starts an Appoint Request for an individual who has another appointment, that data will be displayed in the "Current/Pending PSU Positions" in the yellow box at the top of the module.

6. Many of you have called about the **Cost of Position** for a **Summer Appointment**. When you appoint a benefits-eligible employee for one or both of the summer sessions, the Cost of

Position includes the cost for 12 months of health insurance – and that makes the Cost of Position for that appointment too high. For most folks, the Cost is not an issue. For a few others (e.g. grant-funded positions), it is. We don't have a solution for changing the amount of health insurance used in the Cost of Position box. We have added the following note at the bottom:

Please note that this is an estimate of employer-paid fringes. The amount for health insurance reflects the cost for 12 months coverage. Contact Budget at x. 4105 if you need help determining the cost of health insurance if the appointment is less than 12 months.

7. **Extra Duty Compensation (EDC's):** Benefits-eligible employees who receive extra assignments are paid on the paper EDC form. Even though the E-Appoint process would handle this type of action, it is not set up for EDC's yet. Please complete the paper form for an EDC payment.
8. We have made the following fields **required** in the **Unclassified Appoint Request**:
 - Terminal Degree (Select Yes or No)
 - Promotion Prior Service (Use the drop down box to select 0 or the appropriate # of prior service years for promotion.)
 - Tenure Prior Service (Use the drop down box to select 0 or the appropriate # of prior service years for tenure.)
 - Special Conditions (Select Yes or No. If you select Yes, you will type the special condition language in the text box.)
9. We have enhanced **Special Conditions**. We will soon be adding examples of Special Condition language to the E-Appoint instructions. When you appoint an individual in an Appoint Request, if they have Specials Conditions on their current position, those Special Conditions will appear on the default (left) side of the Appoint Request in the Special Conditions box. You should review the current Special Condition language to determine if it will apply to the new appointment and type the "new" Special Condition as appropriate.
10. There is now a "Remove" button for Attachments so that an Attachment can be removed (e.g. the wrong document was attached). The Remove button is available only to the individual who attached the document.

Once again, thank you to everyone who has helped work through these first few months in the electronic appointment process. It is not our intent is not to eliminate verbal communication – only to make the process go quicker and (hopefully) easier. Please call Michele Sexton at extension 4188 or Lauren Werner at extension 4105 if you have questions or need help with a situation.