Overview

- This job aid is intended for the HCM Initiator.
- This job aid is for adding a summer salary assignment for TTT faculty's summer research, IF such an assignment doesn't already exist.

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1. **Navigate to Person Management**

   a. You can access **Person Management** in two ways:

      i. (Option 1) Click the Navigator icon in the upper left-hand corner of the iO page.

      i. Under the **My Client Groups** section click the drop-down arrow and select **Person Management** from the drop-down list.
2. Does Faculty Need a New Assignment?

1. In the **Name** field, type the person’s name. Select the **Search** button.

2. If the faculty member only comes up with one line – one assignment – then they are going to need another assignment to be added for their summer salary.

3. But suppose they have several lines? How do you know if they already have a summer salary assignment set up? And if so, which one is it? Take the example below.

<table>
<thead>
<tr>
<th>Department</th>
<th>Assignment Number</th>
<th>Assignment Name</th>
<th>Position</th>
<th>Assignment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>24300: Physics and Astronomy</td>
<td>E140349</td>
<td>Professor of Physics &amp; Astronomy</td>
<td>Professor</td>
<td>Active - Payroll Eligible</td>
</tr>
<tr>
<td>24300: Physics and Astronomy</td>
<td>E140349-6</td>
<td>Department Chair, Physics and Astronomy</td>
<td>Department Chair</td>
<td>Active - No Payroll</td>
</tr>
<tr>
<td>27440: Electrical and Computer Engineering</td>
<td>E140349-7</td>
<td>Professor, Electrical and Computer Engineering</td>
<td>Joint Professor Faculty Appointment</td>
<td>Active - No Payroll</td>
</tr>
<tr>
<td>24300: Physics and Astronomy</td>
<td>E140349-2</td>
<td>Professor</td>
<td>Professor</td>
<td>Active - Payroll Eligible</td>
</tr>
<tr>
<td>27500: Materials Science &amp; Nanotechnology</td>
<td>E140349-8</td>
<td>Professor, Materials Science &amp; Nanotechnology</td>
<td>Joint Professor Faculty Appointment</td>
<td>Active - No Payroll</td>
</tr>
</tbody>
</table>
a. First, you may need to make for yourself a saved search such as my example, bringing in the columns that are most informative.

b. In this example, we can recognize and eliminate from consideration the Department Chair assignment and the two joint appointments (Position column).

c. That leaves the two lines that just say Professor in the Position column.

d. Now look at the Assignment Number column. Most of the time, the one with no suffix at the end is the primary position, so that leaves the one that is highlighted in blue.

e. To confirm this, hover your cursor over the person’s name on the blue line until you see an orange oval with three dots inside it. Click the orange dots.

![Image]

f. And up pops the confirmation:

![Image]

4. So if they already have a summer salary assignment, then your next step depends on the Assignment Status of the existing record.

   a. If the existing summer salary is in the Assignment Status of Active- or Suspended-, then:

      i. Your action will be Edit / Update / Assignment Change.
      
      ii. You will use an effective start date such as 5/16/2022.
      
      iii. Make sure the Assignment Status is Active – Payroll Eligible.
      
      iv. Give it a new Projected End Date such as 8/15/2022.
      
      v. Submit.
      
      vi. Do a salary change in Compensation.

   b. If the existing summer salary is in the Assignment Status of Inactive-, then:

      i. Your action will be Edit / Update / Add Assignment.
      
      ii. You will use an effective start date such as 5/16/2022.
iii. Make sure the Assignment Status is Active – Payroll Eligible.
iv. Give it a new Projected End Date such as 8/15/2022.
v. Submit.
vi. Do a salary change in Compensation.

But that’s if they already have a summer salary position already set up. If they don’t, then here’s how you add one . . .

3. Adding a New Summer Salary Position: Note Position Number

1. If they DO NOT already have a summer salary assignment, before you go further, you will need to know their Position Number. This is the same as position numbers used to be in Banner. If you don’t know it, here’s how to find it.
   a. Click the name link on their primary assignment.
   b. In the Job Details section, hover over Position until the orange dots appear; click on that.

2. In the pop-up box, you will see their Position Number, followed by a suffix of -00, which indicates that this is the basic position.

3. Make note of this number.

4. Create a New Faculty Summer Salary Position

   1. Navigate to Workforce Structures:
      a. From the iO Home Page, select the My Client Groups tab.
i. In the Apps directory, select **Workforce Structures**.

1. Select **Manage Positions** from the Workforce Structures menu.

2. Click on Manage Positions then select the **Create** button on the Manage Positions page.
b. Enter position basic details: Effective Start Date, Business Unit, Name and Code.

*Effective Start Date: Type date or use calendar to select the date.
*Business Unit: GENERAL
*Name: Faculty Summer Salary
*Code: The faculty’s primary position number, plus of suffix of -09.
Action Reason: Skip this; no reasons loaded at this time.

c. Scroll to the top of the page, select Next.

5. Enter the following in the Position Description region on the Position Details page:

a. Status: Active.
b. Department: As appropriate
c. **Job:** Search for the **Code: SMSAL**.

![Search](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Summer Salary</td>
<td>SMSAL</td>
</tr>
</tbody>
</table>

6. Scroll down to **Work Terms** and enter:
7. **Standard Working Hours:** 40
8. **Frequency:** Weekly
   a. Scroll to the top of the page, click **Next**, until you arrive at the **Review** page.

![Review](image)

9. Review all information on the **Review** page. Then, select **Submit**.

![Submit](image)

*Please note:* Workflow will be triggered for this transaction.

a. Click **Yes** on the confirmation page.

![Yes](image)

10. Wait for this new position to complete its approvals. When it has, you will be able to go on to the next step of adding it as an assignment for the faculty member.
5. Add the New Faculty Summer Salary Position as an Assignment

1. Navigate to the faculty in Person Management. Click on the name link on the line of their primary position.
2. In the Employment section, open the Edit drop-down box.

4. Select Update.

5. In the Update Employment window, update the following fields:

   a. Effective Start Date: For pay purposes, the summer is May 16 – Aug. 15. Your dates should be those dates or some date range between those dates.
   b. Assignment Status: Add Assignment.
   c. Action Reason: Faculty Summer Salary.
   d. Click OK.
6. In the Assignment Details section, enter the following:

- **Person Type:** Employee
- **Business Unit:** GENERAL
- **Assignment Status:** Active – Payroll Eligible.
- **Primary:** No.
- **Projected End Date:** Enter the end of this year’s summer salary period; no later than Aug. 15.

7. On Job Details page, change the details as required to add the assignment:
   - **Click the down arrow by Position, then Search.**
   - **In the pop-up search box, enter the faculty’s Position Number that you made note of earlier in the Code field. Hit Search.**
   - **If the Summer Salary position has been approved, then you should see two lines in the results. Select the one with the -09 suffix.**
   - **Synchronize from Position:**
     - This field appears after you have selected a Position, and it is set to Yes by default.
     - Position Synchronization will auto-populate the values for Job, Department, Grade, Regular or Temporary, Full Time or Part Time, Assignment Category, Working Hours, Frequency, Standard Working Hours, and FTE fields.
     - **If you need to modify any of the auto-populated fields, go back and select No to Synchronize from Position and then carry on with the modifications.**
When set to **Yes**, auto-fills some fields:  
When set to **No**, fields become editable:

- **e. Job:** Faculty Summer Salary.
- **f. Assignment Name:** Faculty Summer Salary
- **g. Grade:** Leave blank.
- **h. Assignment Category:** T/TT Faculty: Benefits Eligible.
- **i. Hourly Paid or Salaried:** Salaried.
- **j. Working Hours/FTE:** OK to leave this to match primary assignment.
- **k. In the Managers Details subsection,** search for and select the NTT’s immediate supervisor.

8. Click **Next**. On the Compensation page:
   - **a. Salary Basis:** Can stay as 9 month over 12 month Salaried (Faculty)
   - **b. Salary Amount:** As appropriate

9. Click **Next** twice.

8. **Select the Review button.**

9. After you have reviewed your changes, you can either hit **Back** to go back and make any changes, or hit **Submit** to send it on for approvals.