Overview

- This job aid is intended for the HCM Initiator.

WHEN TO ADD AN ASSIGNMENT:

- If they will keep another assignment, and this one is in addition to that.
- If existing assignment(s) end one day, and this new assignment starts the next day, replacing the last one, **AND THE PERSON’S POSITION # WILL BE CHANGING.** (If this is the case, note that you must, in this order: [1] Add the new assignment, [2] End the old assignment, even if it had a 6/30/21 job end date in Banner, and [3] Add the job labor distribution for the new assignment.)
  - **NOTE:** Immediately after you add the new assignment, you will need to END the previous assignment, even if it had a Projected End Date of the day before the new assignment begin date.

WHEN NOT TO ADD AN ASSIGNMENT:

- If existing assignment(s) end one day, and this new assignment starts the next day, replacing the last one, **AND THE PERSON’S POSITION # WILL STAY THE SAME.**
  (If this is the case, even if the person’s title, rank, FTE, etc., will change, it’s better to: [1] Update the existing assignment, and, if necessary, [2] Update the job labor distribution.

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- Page 2: Add a New Assignment
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1. **Navigate to Person Management**

1. You can access **Person Management** in two ways:
   a. *(Option 1)* Click the Navigator icon in the upper left-hand corner of the iO page.

![Diagram showing navigation options](image-url)
2. Add a New Assignment
   1. In the **Name** field, type the person's name. Select the **Search** button.

   2. Select the appropriate person in the Search Results section. When you have selected a certain line, it turns **blue**. If they have multiple lines (assignments or roles), select the one that seems most relevant.
3. **Edit / Update / Add Assignment**
   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:** In general, faculty appointments should start on July 1 or January 1. See the job aid, “Fac4b_Adding an NTT Assignment – One Semester Appt” for an important exception to the rule.
   b. **Assignment Status:** **Add Assignment.**
   c. **Action Reason:** **Optional.**
   d. **Click OK.**
6. In the Assignment Details section, enter the following:

a. **Person Type:** Employee
b. **Business Unit:** GENERAL
c. **Assignment Status:** Active – Payroll Eligible

d. **Primary:** If this assignment is going to REPLACE their primary assignment, select Yes. (You will get a warning message; just confirm it.) If this is a secondary appointment, select No.

e. **Projected End Date:** Note: Some assignments (ex. Temporary Pooled Position, NTT Faculty) need the Projected End Dates field populated.

   The Projected End Date should reflect the end of the current appointment.

   Note that you must submit another action to end the assignment; otherwise, the job will stay active and the faculty will continue to receive pay beyond the Projected End Date.
7. On Job Details page, change the details as required to add the assignment:

a. **Position**: Choose from the drop-down menu.

   The Position field identifies the position number, which you can see in the second column in the dropdown menu. The numbers that start with 1, 2 or 3 correspond to the budgeted position numbers from Banner, plus a 2-digit suffix.

   So, if you have a budgeted position number, then search for that number in the “Code” field of the Search pop-up box.

   However, pooled position numbers are different. They no longer start with a letter. Here’s how pooled positions work in iO:

   **POOLED POSITION NUMBERS (CODE):**

   `XXXXX – XXXXX` (1st set of digits = position class code; 2nd set of digits = iO org #)

   To search for a pooled position number:
With a pooled position, if you get a warning message about this position not having any open headcount, just continue anyway.
b. **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:*

![Image of Synchronize from Position feature]

- **Job:** Choose from drop-down menu or Search (at the bottom). These are the options for faculty categories:

<table>
<thead>
<tr>
<th>Assistant Professor</th>
<th>Lecturer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Professor NTT</td>
<td>NIH Postdoctoral Fellow</td>
</tr>
<tr>
<td>Assistant Research Professor</td>
<td>Postdoctoral Associate</td>
</tr>
<tr>
<td>Assistant Teaching Professor</td>
<td>Professor</td>
</tr>
<tr>
<td>Associate Dean (Faculty)</td>
<td>Professor in the Practice</td>
</tr>
<tr>
<td>Associate Professor</td>
<td>Professor NTT</td>
</tr>
<tr>
<td>Associate Professor NTT</td>
<td>Research Professor</td>
</tr>
<tr>
<td>Associate Research Professor</td>
<td>Senior Lecturer</td>
</tr>
<tr>
<td>Associate Teaching Professor</td>
<td>Teaching Professor</td>
</tr>
<tr>
<td>Instructor</td>
<td>Visiting Faculty</td>
</tr>
<tr>
<td></td>
<td>Associate Dean</td>
</tr>
<tr>
<td></td>
<td>Dean</td>
</tr>
<tr>
<td></td>
<td>University President</td>
</tr>
<tr>
<td></td>
<td>Vice President</td>
</tr>
<tr>
<td></td>
<td>Vice Provost</td>
</tr>
</tbody>
</table>

- **Assignment Name:** This is the title that will be displayed in the directory; can be specialized, as with endowed chairs or named titles, e.g., Wiess Instructor.
- **Grade (Rank):** Select or Search. For faculty, **RANK** is reflected in the Grade field, even though faculty positions do not have salary ranges. All faculty
ranks in this dropdown list start with “Faculty –”, so you could search on “Faculty” to narrow down the list:

f. **Location:** This refers to the room and building on campus where this person will be working. It is a required field. If they will not be working on campus or it doesn’t apply (as for a joint appointment), you can select “No Rice Location Assigned.”

To find a specific location, search on the name of the building, then select the room. The naming convention is like: Building/floor/room#.
g. **MAIL STOP:** To add the mail stop (Don't forget!), click the Location Details icon to the right of the Location field and add the mail stop in the appropriate field. MS-92

h. **Working at Home:** Yes or No as appropriate.

i. **Worker Category:** Leave blank for faculty.
j. **Assignment Category:** Choices for faculty include:

includes Teaching Professor and Research Professor ranks

NTT faculty are benefits eligible if they teach at least 3 classes over both the fall and spring semesters in a given academic year. This is per Rice’s Policy 403 on benefits eligibility.

k. **Working as a Manager:** Select No unless you know whom they will supervise and are ready to add them. This can always be changed later.

l. **Hourly Paid or Salaried:** Choose from drop-down menu. Faculty are always salaried.

m. **Working Hours/FTE:** For budgeted positions, this defaults in, e.g., as full-time (1 FTE).

For instructional NTTs, use this as a general guide:

<table>
<thead>
<tr>
<th>Classes taught per year</th>
<th>Working hours per week</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 class</td>
<td>6.7 hrs/wk</td>
<td>.17 FTE</td>
</tr>
<tr>
<td>2 classes</td>
<td>13.6 hrs/wk</td>
<td>.34 FTE</td>
</tr>
<tr>
<td>3 classes</td>
<td>20 hrs/wk</td>
<td>.5 FTE</td>
</tr>
<tr>
<td>4 classes</td>
<td>26.7 hrs/wk</td>
<td>.67 FTE</td>
</tr>
<tr>
<td>5 classes</td>
<td>33.4 hrs/wk</td>
<td>.84 FTE</td>
</tr>
<tr>
<td>6+ classes</td>
<td>40 hrs/wk</td>
<td>1 FTE</td>
</tr>
</tbody>
</table>

When you change the Working Hours and click or tab out of the field, note how the FTE changes:
CONTINUE TO THE RIGHT HAND COLUMN of the Job Details page:

Select or fill in these fields:

n. **Skip down to Total Classroom Hours/Total Office Hours**: Enter the number of credit hours per year they are expected to teach. For example, three 3-hour classes (2 classes in the fall and 1 in the spring) = 9 Total Classroom Hours.

ACA (Affordable Care Act):

This applies to NTTs (usually part-time) who do not qualify for Rice benefits (see Policy 403), yet may qualify for health insurance through ACA.

- **2.25 hours** to be counted for each “classroom hour” (not credit hour) of time per week. Note, the multiplier of 2.25 provides credit for time spent towards class preparation and grading.
- **1.00 hour to be counted**, per week, for each additional hour that the NTT faculty member spends performing required duties outside of the classroom such as office hours, required meetings, and/or other required duties within the department.

**Example**: One (1) class that meets three (3) hours per week and requires two (2) office hours would equate to 8.75 total ACA eligible hours.

<table>
<thead>
<tr>
<th>3 classroom hours x 2.25 =</th>
<th>6.75 hours</th>
<th>Required in iO</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 office hours</td>
<td>2.00 hours</td>
<td>Required in iO</td>
</tr>
<tr>
<td><strong>TOTAL ACA eligible hours</strong></td>
<td><strong>8.75 hours</strong></td>
<td><strong>Not required in iO</strong></td>
</tr>
</tbody>
</table>

For iO this one 3-hour course would translate to:

<table>
<thead>
<tr>
<th>Number of Courses</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Classroom Hours</td>
<td>6.75</td>
</tr>
<tr>
<td>Total Office Hours</td>
<td>2</td>
</tr>
</tbody>
</table>

o. **Tenure Status**: Tenured: usually Assoc Prof or (full) Professor
   On Tenure Track: usually Assistant Professor
   Non-Tenure Track: any other faculty
   Emeritus: retired TTTs granted emeritus status

p. **Faculty Rank Effective Date**: Enter date new rank was achieved – but only when processing a change in rank.
q. In the Managers Details subsection, search for and select the new hire’s immediate supervisor.

For faculty, their Manager would be the department chair or center director. Select the line for the Department Chair assignment.

The Type is always Line Manager.

**PAYROLL TAB:**

Now scroll back up and click on the Payroll tab.

8. On the Payroll tab, in the Payroll Details section, click the + button.

   a. Select Semi-Monthly from the Payroll dropdown field. (Faculty payroll is always semi-monthly.)

9. Click on Next to the Compensation Details page.
10. On the Compensation Details page, enter the Salary Basis.

11. Enter the Salary Amount. (just numbers, no comma or $)
   a. If the faculty is full-time and/or paid a set amount over the academic year, type the annual salary.
   b. If the faculty has an appointment of at least one year, put in the amount that would be paid over the academic year assuming that the faculty earned the same amount over both semesters.

   As an example: If the faculty is teaching one class in the fall, and none in the spring, and is to be paid $4,000 per course:
   
   i. Enter the total amount that the faculty would be paid if teaching the same number of courses in the second semester as in the first. So in this example, enter a Salary Amount of 8000
   ii. When you tab or click out of the field, a calculated Annual Salary and Annualized Full-Time Salary will show in the next two fields.
   iii. In this example you would need to do another action for the next semester, in which you would change the Assignment Status (see step 6.c. on page 5 above) to “Active – No Payroll,” to stop pay in the spring semester.

12. To enter the expenses information, Expand the Expenses Information section and then click on the Search icon. A pop-up will appear.
Enter all codes as below, except for the Org code, which should be the appropriate one for this appointment.

13. If you need to add attachments, that can be done at the bottom of the Review page. Click the plus sign to add a document.
a. In the pop-up window, select Add from the Actions drop-down list.

![Add Attachment](image)

b. Choose the file to be added. Make sure the title is descriptive of the attachment. Add a description if desired.

![Add Attachment](image)

c. Close the window by hitting the X in the upper right corner.

![Attached Date](image)

**NOTE:** If this assignment is replacing one that has a Projected End Date, you need to take specific steps to END that assignment! Otherwise, they will end up double paid. See job aid, “Fac4b_Ending an NTT Assignment.”
14. Select the Review button.

15. 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.