Overview

- This job aid is intended for the HCM Initiator.
- This job aid describes adding a secondary, administrative title with no additional pay attached to someone who is primarily NTT faculty. Example: Director of xxxx.
- Secondary titles for faculty require an appointment letter, usually from the dean.
- Secondary appointments are usually for a limited term, so should have a Projected End Date.
- The Projected End Date for the secondary, administrative assignment should not exceed the Projected End Date for the NTT primary 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.
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 – No Payroll

   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, and should not exceed the Projected End Date on the primary assignment.

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 #) **The position class code for faculty administrative roles is FA001.**

To search for a pooled position number:

Select the one for the appropriate unit:
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 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:

• Job: Faculty Administrative Role.
d. Assignment Name: This is the title that will be displayed in the directory, so put what the title should be.

e. Grade: Leave blank.

f. Location: OK to select “No Rice Location Assigned.”

g. Working at Home: Yes or No as appropriate.

h. Worker Category: Leave blank for faculty.

i. Assignment Category: Should match primary assignment. 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.

j. 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.

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

l. Working Hours/FTE: If this assignment is without extra pay, OK to leave this to match primary assignment.

m. In the Managers Details subsection, search for and select the NTT’s immediate supervisor.

For faculty, their Manager would be the department chair or center director. Select the line for the Department Chair assignment. Or whatever makes sense; for example, an Associate Dean would report to the Dean.

The Type is always Line Manager.

8. 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.

![Close Window](image)

8. Select the Review button.

![Review Button](image)
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.