Overview

- This job aid is intended for the HCM Initiator.

WHEN TO CHANGE AN ASSIGNMENT:

- Reappointment, FTE change, title change, reclassification or promotion while STAYING IN SAME POSITION #.

- It is much simpler to change an existing assignment than it is to end one and start a new one, assuming that there is no change to the position number.

- Please note that to change someone’s pay is a separate transaction under Compensation. Changing their FTE will not change the salary of the person; such a change requires two actions: (1) Change Assignment under Employment, and (2) Change Salary under Compensation.

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1. **Navigate to Person Management**

   a. (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. Search for a Person

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 should be ended.
3. Reclassification

1. On the Employment tab, select the **Edit** drop down box, in the Assignment section.

2. Select **Update** button.

3. **Effective Start Date:** Type out date or use calendar to select the update date.

4. **Action:** **Assignment Change.**

5. **Action Reason:** **Reclassification. (or whatever other action reason fits this action)**
6. Update any other relevant fields, such as Assignment Status and Projected End Date.
7. In the Job Details page, for a reclassification (no change in position number), do not change the “Position” field.
8. Be sure that “Synchronize from Position” is set to “No.”
9. Update any other relevant fields, such as: Assignment Name (Title), Grade (Rank), Working Hours (which controls FTE), etc.

a. In the Job field, select a category from the drop down list, or Search (at the bottom). These are the options for faculty categories:
b. **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.

c. **Grade:** 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:
d. 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#.

![Search and Select: Location](image)

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
f. **Working at Home:** Choose as appropriate.

g. **Worker Category:** For faculty, leave blank.

h. **Assignment Category:** Choices for faculty include:

i. **Working as a Manager:** Leave as NO, unless you know who they will be supervising and are ready to enter them. This can always be changed later.

j. **Hourly Paid or Salaried:** Salaried.

k. **Working Hours:** For instructional NTTs, use this as a general guide:

```
Classes taught per year / Working hours per week / FTE:
1 class    =  6.7 hrs/wk    =  .17 FTE
2 classes  = 13.6 hrs/wk   =  .34 FTE
3 classes  = 20   hrs/wk   =  .5   FTE
4 classes  = 26.7 hrs/wk   =  .67 FTE
5 classes  = 33.4 hrs/wk   =  .84 FTE
6+ classes = 40  hrs/wk    = 1   FTE
```

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:

1. Skip down to Total Classroom 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.

m. 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

n. Tenure Date: Enter date tenure received – but only when processing promotion to tenure.

o. Faculty Rank Effective Date: Enter date new rank was achieved – but only when processing a change in rank.

Managers Details subsection:

p. Search for a Name. For faculty, their Manager would be the department chair or center director.

q. Type: Line Manager.

10. Click on Review to review the changes entered. (To come back to this action later without submitting, click Save or Save and Close.)
11. To make any changes, click the Back button to return to data entry page.
12. Upon completion of the data review, click on Submit.

9. In the warning popup, click Yes.

10. The action will now go through the approvals process.