Health Sciences Career-line Faculty Reappointment Process

Piikea Akimseu
Director, Office of Academic Affairs
Office of the Vice Dean
## Important Contacts:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Department</th>
<th>Location</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Piikea Akimseu</td>
<td>Director</td>
<td>Academic Affairs &amp; Faculty</td>
<td>5515 HSEB</td>
<td><a href="mailto:Piikea.Akimseu@hsc.utah.edu">Piikea.Akimseu@hsc.utah.edu</a></td>
<td>801-581-5705</td>
</tr>
<tr>
<td>Jan Cundey</td>
<td>Administrative Program Coordinator</td>
<td>Academic Affairs &amp; Faculty</td>
<td>5515 HSEB</td>
<td><a href="mailto:Janette.Cundey@hsc.utah.edu">Janette.Cundey@hsc.utah.edu</a></td>
<td>801-587-7882</td>
</tr>
<tr>
<td>Heather Call</td>
<td>Program Manager</td>
<td>Senior Vice President for Academic Affairs</td>
<td>308 Park Building</td>
<td><a href="mailto:Heather.call@utah.edu">Heather.call@utah.edu</a></td>
<td>801-585-5355</td>
</tr>
<tr>
<td>Tracy Allen</td>
<td>Administrative Assistant</td>
<td>Academic Affairs &amp; Faculty</td>
<td>5515 HESB</td>
<td><a href="mailto:Tracy.Allen@hsc.utah.edu">Tracy.Allen@hsc.utah.edu</a></td>
<td>801-585-6283</td>
</tr>
</tbody>
</table>
Objectives of the Training

• Who are Career-line Faculty in my Department/College?

• What tools do I need to use to run these reports for the Reappointment Process?

• When is the report due to Academic Affairs?

• What other actions may I need to take?
University and Utah Regulations Governing Career-line Faculty Appointments:

Career-line faculty members are defined by university regulations as any faculty appointment (including library faculty) in the following tracks:

- Lecturer
- Clinical
- Research

Other Faculty Categories include:

- Adjunct
- Visiting and
- Emeritus

There are 2 types of Adjunct that are part of Health Sciences:

- Adjunct and Volunteer Adjunct

See Policy 6-300 for definitions and terms for University Faculty – Categories and Ranks (http://regulations.utah.edu/academics/6-300.php)
Overview of the Process

Review information at the Department level using existing data in Peoplesoft (HRIL and Job Data) and MBM (REAPPOINTMENT: Career-Line Faculty Report).

Hold the vote for Career-line faculty for your Department/College.

Notify your Career-line faculty as appropriate and submit report to the Office of Academic Affairs.
D-JOBS and Tenure Data (HRIL)

D-Jobs and tenure data (HRIL) should be in sync.

D-Jobs data and tenure data (HRIL) is stored separately in the PeopleSoft system and are not linked to one another.

The tenure data (HRIL) in the Career-line faculty report you will be generating originates from the faculty E-PAF/eForms.

Changes to faculty titles and statuses need to be recorded in both areas by submitting a Hire or Promotion E-PAF/eForm.
D-JOBS and Tenure Data (HRIL)

If a Department has not issued a Hire ePAF/eFORM on a Faculty member, they would not have D-JOBs Data in PeopleSoft.

A department should run the HRIL report and the ‘Job Details – basic info only’ report to see if any hire ePAF’s need to be issued for current faculty members.

If you have D-JOBs access you have access to run the ‘Job Details-basic info report.'
‘Job Details-Basic info only’ report

If a department coordinator does not have access to D-JOB’s to run the ‘Job Details- Basic info only’ report, one can obtain access by requesting with the proper authorization.

Submit the ePAF/D-JOB’s/HRIL Access Form to Human Resources to request access.

This form is located in the Employment Services Section on the Human Resources Forms Web Page.

Indicate on the form you want access to run the ‘Job Details-Basic info only’ report.
Accessing your Career-line Faculty Reports in CIS

Departments will access the Human Resources Information Library (HRIL) and run the following reports: AUXILIARY FACULTY TABLE and Job Details-basic info only.

These reports should be an accurate and current report of all Career-Line faculty appointments within your department as represented in Peoplesoft.
Accessing your Career-line Faculty Reports from Human Resources Information Library (HRIL)

Log in to Campus Information system

Locate “HUMAN RESOURCE MANAGEMENT” on the “employee” tab

Click on the Human Resources Information Library link to run the Report
Accessing your Career-line Faculty Table report from Human Resources Information Library (HRIL)

Open the “FACULTY” folder

AUXILIARY FACULTY TABLE
Accessing your Auxiliary Faculty Reports from Human Resources Information Library (HRIL)

You should now be on the Auxiliary Faculty Table Query Builder.

Enter your department/college org ID.

If you have divisions or departments that roll up to your org ID, you will need to change the Dept/ID rollup to “yes” to see all of your department/college faculty.

Click the “GET RESULTS” Button.
Accessing your CAREER-LINE faculty reports – HRIL (Tenure Data)

You will see a list of your current Career-line faculty (as listed in Peoplesoft).
Download this query to Excel.
Review list for department faculty vote.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Rank</th>
<th>Tenure Dept</th>
<th>Dept Name</th>
</tr>
</thead>
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<td>ADAMS, ROBERT</td>
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<td>00223</td>
<td>Family And Preventive Medicine</td>
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<tr>
<td>000618344</td>
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<td>000689184</td>
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<tr>
<td>000469152</td>
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<tr>
<td>000309950</td>
<td>ALLEN, D. WANNI</td>
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<tr>
<td>00031551</td>
<td>ALLEN, JAMES F</td>
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<tr>
<td>000218063</td>
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<tr>
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<tr>
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<tr>
<td>00072210</td>
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<tr>
<td>000712624</td>
<td>ALLRED, THOMAS J</td>
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<tr>
<td>000112977</td>
<td>ALSUP, JR, DANIEL D</td>
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<tr>
<td>000679431</td>
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<tr>
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<tr>
<td>000333324</td>
<td>ANDERSON, MARLAY A</td>
<td>Adjunct Instructor</td>
<td>00223</td>
<td>Family And Preventive Medicine</td>
</tr>
</tbody>
</table>
Accessing your ‘Job Detail – Basic Info only’ report from Human Resources Information Library (HRIL)

Open the “CURR EMPLOYEES” folder
Accessing the ‘Job Details-basic info only’ report from the Human Resources Information Library (HRIL)

JOB DETAILS-basic info only
Accessing your ‘Job Details-basic info only’ reports in Human Resources Information Library (HRIL) (Job Data)

You should now be on the Job Details-basic info only Query Builder.

Enter your department/college org ID.

If you have divisions or departments that roll up to your org ID, you will need to change the Dept/ID rollup to “yes” to see all of your department/college faculty.

Click the “GET RESULTS” Button.
Accessing your ‘Job Details-basic info only’ reports in Human Resources Information Library (HRIL)

Compare the HRIL report with your Job Details-Basic Info Only report.

If you do not have a record for a faculty member in your Job Details-Basic Info Only report who is in your HRIL report you will need to issue a eFORM/ePAF to add that faculty member into PeopleSoft.

When submitting the eFORM/ePAF attach a copy of the President’s Letter showing the date that they were originally hired.

Indicate in comment section of eFORM/ePAF you are adding a faculty member to show in Job Data, already in system include original date of hire.

The effective date of the eFORM/ePAF will need to be the date that you issue this to add them to the system.

These eFORMS/ePAF’s will need to be issued before submitting the final reappointment list of your Career-line Faculty to our office. These eFORMS/ePAF’s are to be submitted by March 9, 2015.
Accessing the Reappointment: Career-Line Report in the MBM System

Go to the “Run a Report” Tab
Accessing the Reappointment: Career-Line Report in the MBM System

Reappointment: Career-Line
Reviewing MBM Report against HRIL Report

Compare the MBM Reappointment Career-Line Report to the HRIL Report.

If you have a record of a faculty member in MBM, but they are not listed on your HRIL report you will need to troubleshoot to see if an initial HIRE eFORM/ePAF was issued.

All 3 reports should be in synch and depending upon what report a faculty member is on or not on you will need to troubleshoot why the information is not matching up.

Once you compare all 3 reports (HRIL, Job Data and MBM) that the information is in synch you will need to prepare your final HRIL report for your department review and vote.
Clearing temporary internet files & cookies

If you are not able to view your records, you may need to clear your cache and cookies.

For Internet Explorer Browsers:
Click on tools and select “INTERNET OPTIONS”
Click on Delete Cookies and Delete Files
Clearing temporary internet files & cookies

If you are not able to view your records, you may need to clear your cache and cookies.

For Mozilla Firefox Browsers:

Click on Tools (same location as Internet Explorer) and then click on Clear Private Data.

Place a check mark next to Cache and Cookies then click on Clear Private Data Now.
Department Review and Vote

After you have reconciled your lists so that you know who your Department will reappoint for the New/Fiscal Year, you will present this list as well as any new faculty hires, promotion of Career-line faculty, and non-reappointments to Tenure-line department faculty for review and vote.

Any faculty who will have a hire date of February 19, 2015 or later (up until June 30, 2015) will need to be added to the bottom of your list manually. If you are adding new hires (at the bottom of your list), you will need to add them to your list of faculty with status of “NH” for faculty vote.

Promotions (P) and Non Reappointments (NR) should be noted on the report.

Multi-year (MY) faculty appointments should include reference to the term of the proposed contract on the list for faculty vote.
SOM Faculty who were up for Promotion in the 2014 – 2015 RPT Cycle

Keep in mind any SOM Career-line faculty members who were up for promotion during the 2014 – 2015 RPT cycle, will receive a letter from Dr. Vivian Lee in the Spring.

Once you receive this letter from Dr. Lee you can submit the ePAF moving them to the higher rank.

Other items to remember, Emeritus faculty will show up on your MBM Career-line Reappointment Report, you can disregard them on your list and not include them on your final submitted Reappointment List.
UPDATE Peoplesoft Records – INITIATE E-FORM

If you have any faculty in the following categories on your reappointment list:

- Non-Reappointment (NR)
- Promotion (P) or Multi-year Contract (MY)

An ePAF needs to be issued.

In the comment section on these ePAF’s, please indicate the date of the faculty vote and action requested (e.g. NR, P or MY). You must include supporting documentation on the eFORM/ePAF for promotion and/or multi-year contracts.

For Non-Reappointment eFORM/ePAF, please list ‘NR’ in the comment section; include date of faculty vote and tally of vote.

These termination eFORM/ePAF’s must be completed by May 16, 2015.
Run updated list of 2015-16 Career-Line faculty

The final report should reflect the current career-line faculty list including changes made as part of the career-line reappointment process for 2015-16 (e.g., promotions, name changes).

Your final department list must be reviewed and approved (signed) by the Department Chair and College Dean (for the Eccles Health Science Health Library, College of Health, College of Nursing, College of Pharmacy and School of Dentistry).
Example of what the Reappointment Spreadsheet looks like:

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Academic Rank Descr</th>
<th>Dept Name</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Appt Status</th>
<th>Approvals</th>
<th>Disapprovals</th>
<th>Abstentions</th>
<th>Comments</th>
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<tbody>
<tr>
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<td>ABELE, DALE</td>
<td>Adjunct Professor</td>
<td>Human Genetics</td>
<td>7/1/2015</td>
<td>6/30/2016</td>
<td>R</td>
<td>6</td>
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<tr>
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<tr>
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<td>7/1/2015</td>
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<tr>
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<tr>
<td>00030050</td>
<td>CAWTHON, RICHARD M</td>
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<td>1</td>
<td>Multi-year appointment through 06/30/2016</td>
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</tbody>
</table>
Submit Career-Line Faculty Re-Appointment list to Academic Affairs

Please have your Department Chair sign and date the reappointment list. Please indicate the date of the faculty vote on the report.

Send electronic copy (PDF) of the final Career-line faculty list with Department Chair and College Dean (for the Eccles Health Science Library, College of Health, College of Nursing, College of Pharmacy and School of Dentistry) signature to Tracy.Allen@hsc.utah.edu by April 1, 2015*.

Our office will obtain the signature of Dr. Carrie Byington for the School of Medicine Reappointment lists.

If you have faculty with multi-year contracts please attach copies of the multi-year contracts/memos to the final list.

*This deadline is when colleges need to have their final reports in to Academic Affairs and Faculty Development. Your college deadline may be earlier than that. Please make sure to work with your College Dean’s office to determine when you need to have your department reports submitted to your Dean’s Office.
Notice to Career-Line faculty

New appointments and/or promotions in rank will receive a letter of notification from the President (up to 3 months after the effective date).

If the department does not receive a copy of a President’s letter for a new appointment, please contact the Office of Academic Affairs & Faculty Development.

Letters will **not** be sent for individuals who are recommended for reappointment in the same rank.

They will be included in the comprehensive list distributed electronically to deans and department chairs in July.

Each college or department, however, is expected to provide its own notice to reappointed faculty, especially if they are paid, and retain a copy for your records.
Notice of Non-Reappointment

Departments/Colleges should notify faculty not reappointed through formal letter of their non-renewal.

Non-renewal (NR) eFORMS/ePAF’s of applicable faculty should be issued by May 16, 2015.

Any Career-line, Adjunct or Visiting faculty member should be given at least 3 months notice of non-renewal of appointment, unless particular contractual provisions otherwise govern.

For most faculty members with July 1-June 30 appointments, this means they must receive written notice no later than March 31.
MBM assistance with e-voting*

- To assist you in the departmental voting process, we have worked with the MBM office to allow for an online vote. If you wish to use the MBM system, please follow the following steps:

  Export query to Excel.
  Add new hires to excel report. If you have faculty that you feel should be on the current report, but are not added, please add them to the list for vote*.
  If you are proposing Multi-Year contracts for any faculty please add end date reflecting the term of this contract.
  Change rank in report for those that you are proposing promotion.
  Indicate NR on those faculty that are not going to be re-appointed.
  Email file to mbmoffice@hsc.utah.edu
  MBM will upload the file in E-Survey to automatically generate a ballot that you can send to all voting faculty within your department. The MBM Office will notify you when the upload is complete and is ready for your use.
  Notify the MBM Office when the vote is complete. Votes will be tallied into a final report and sent to you.

* e-voting for faculty appointments is a college level decision. Departments should make sure that their college has approved the use of online voting for auxiliary faculty actions before proceeding to MBM
Important Dates to Remember:

March 9, 2015 – Date any ePAF/eFORMS should be issued if a faculty member in your department needs to be added to PeopleSoft.

March 31, 2015 – Date any faculty member who will not be reappointed will need to be notified that they will not have a job for the new fiscal year.

April 1, 2015 – Date the final Reappointment Spreadsheets are due to the Office of Academic Affairs.

May 16, 2015 – Date all NR (Non Reappointment) ePAF/eFORMS should be issued.
QUESTIONS?