7. Requesting Express FTE Changes for AY Faculty and TAs

This chapter describes the procedures for performing express FTE (time base) changes for academic-year temporary faculty and teaching associates using E-TRAC.

This chapter contains the following sections:

7.1. What is an Express FTE Transaction for AY Faculty & Teaching Associates

Express FTE (time base) change transactions are used specifically to change the time base for multiple academic year-appointed temporary faculty/TAs for a designated department where the time base for the spring semester is changing from the fall semester. If the employee has a fall-only appointment and is receiving a subsequent appointment for the spring, do not use Express FTE changes; use Express Reappointments or Employee Change (Data Change/New Temp Appointment)

7.1.1. Before processing a Faculty Express FTE transaction

From the Query Manager, run the SFO_FACULTY_ROSTER for Fall to identify and review academic year appointees and time bases. If you do not have access to run the query, contact your College Dean's office coordinator to obtain the report data for your department. *Please note that the Express feature for Faculty Express FTE (time base) changes is for temporary faculty or Teaching Associates whose salary or position is not changing from the previous appointment.*

7.2. Requesting an Express FTE (time base) Change Transaction

1 Navigate to the E-TRAC home page: **SFO Self-Service** > **E-TRAC** > **E-TRAC Home** > **E-TRAC Home page**.

2 Select Express Reappointments.

3 Click **Add**. Express Reappointments Requests page appears.

4 Select **Faculty FTE (time base) Changes** from the ***Type** drop down list.

5 Note that the **DeptID** field defaults to the department for which you have security access, override if necessary. If you do not know the department ID, place your cursor in the **DeptID** box and click the magnifying glass. A list of all

department IDs will appear. Click the link for the department that you will perform the express reappointment request. The department ID will appear in the **DeptID** box.

6 In the Year and Term boxes, enter the year (YYYY) and the term that the FTE (time base) change will be effective. The valid values are **FALL**, **SPR** (Spring) and **SUM** (Summer). For example, for changes effective Fall 2007, enter **2007** in the Year field, and **FALL** in the Term field.

7 TAB out of the Term field.

At this point E-TRAC will process your request and display the link **Select Employees**.

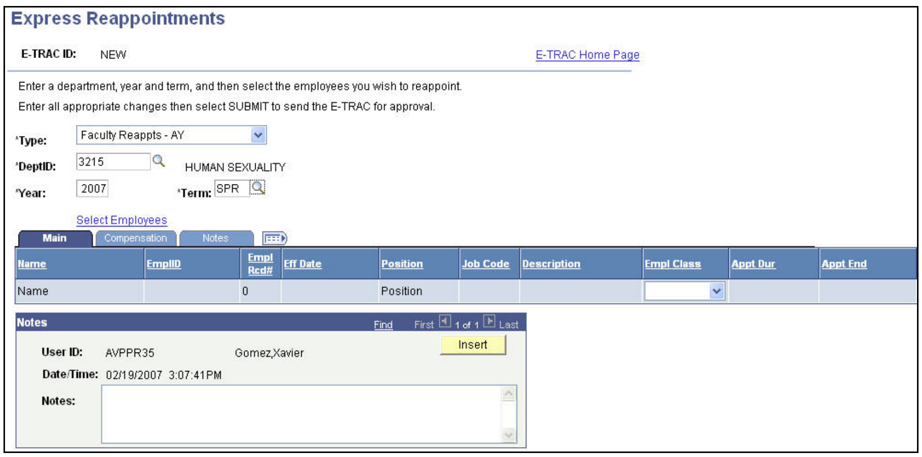
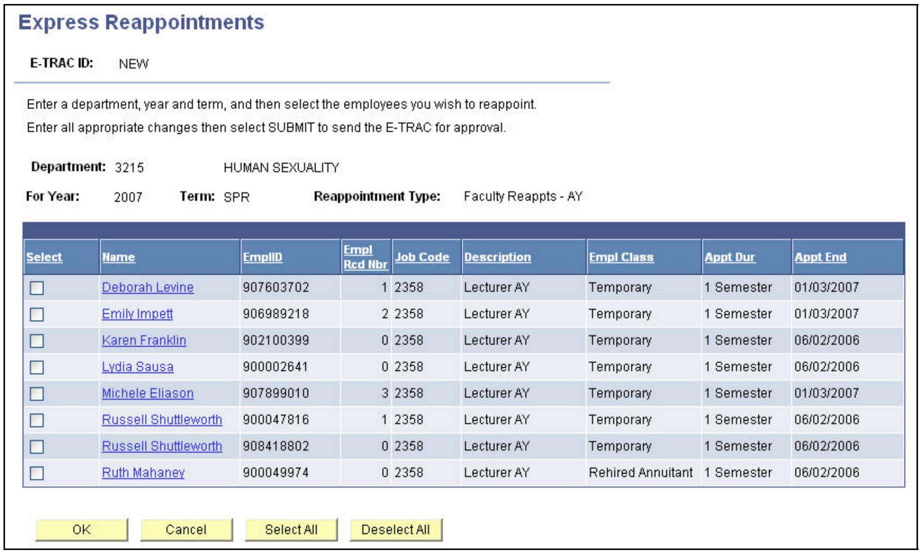


Figure 7-1 How the Express Reappointments page should appear with all pertinent fields populated.

8 Click **Select Employees** link.

You will see a page displaying all the employees in your department who have academic year appointments (Fall through Spring).


Express Reappointments

E-TRAC ID: NEW

Enter a department, year and term, and then select the employees you wish to reappoint.
Enter all appropriate changes then select SUBMIT to send the E-TRAC for approval.

Department: 3215 HUMAN SEXUALITY

For Year: 2007 Term: SPR Reappointment Type: Faculty Reappts - AY

Select	Name	EmplID	Empl Rcd Nbr	Job Code	Description	Empl Class	Appt Dur	Appt End
☐	Deborah Levine	907603702	1	2358	Lecturer AY	Temporary	1 Semester	01/03/2007
☐	Emily Impett	906989218	2	2358	Lecturer AY	Temporary	1 Semester	01/03/2007
☐	Karen Franklin	902100399	0	2358	Lecturer AY	Temporary	1 Semester	06/02/2006
☐	Lydia Sausa	900002641	0	2358	Lecturer AY	Temporary	1 Semester	06/02/2006
☐	Michele Eliason	907899010	3	2358	Lecturer AY	Temporary	1 Semester	01/03/2007
☐	Russell Shuttleworth	900047816	1	2358	Lecturer AY	Temporary	1 Semester	06/02/2006
☐	Russell Shuttleworth	908418802	0	2358	Lecturer AY	Temporary	1 Semester	06/02/2006
☐	Ruth Mahaney	900049974	0	2358	Lecturer AY	Rehired Annuitant	1 Semester	06/02/2006

OK Cancel Select All Deselect All

Figure 7-2 List of employees to be reappointed

9 Select the check boxes that correspond to the faculty for whom you wish to change the FTE (time base) effective Spring semester.

10 If you wish to change the FTE (time base) all faculty members in the list, click the **Select All** button.

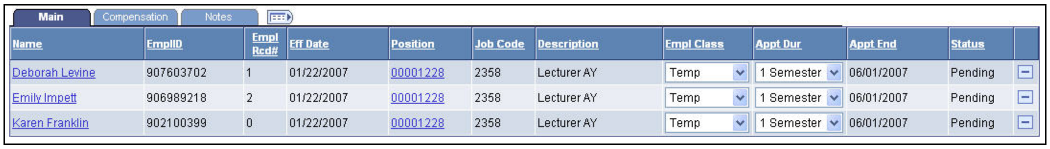
11 If you find that you have selected the wrong faculty member(s) and wish to start over, you may click the **Deselect All** button.

12 Once you have selected the faculty members that require FTE (time base) changes for spring, press **OK**.

7.2.1. Main tab

The main tab displays eight columns: name, EmplID (Employee ID), EmplRcd# (Employee Record Number), Eff Date (effective date), Position, Job Code, Description, and Status. Next to each row is a “minus” button. Clicking this button will delete the row in which it lies.

1 In the Main tab, the Eff Date will auto-populate according to the year and term you selected and Appt Dur value. In cases where the effective dates are different than the Academic Year dates established for semesters, you will need to process a transaction using E-TRAC Hire or Employee Change.


Main | Compensation | Notes

Name	EmplID	Empl Rcd#	Eff Date	Position	Job Code	Description	Empl Class	Appt Dur	Appt End	Status
Deborah Levine	907603702	1	01/22/2007	00001228	2358	Lecturer AY	Temp	1 Semester	06/01/2007	Pending
Emily Impett	906989218	2	01/22/2007	00001228	2358	Lecturer AY	Temp	1 Semester	06/01/2007	Pending
Karen Franklin	902100399	0	01/22/2007	00001228	2358	Lecturer AY	Temp	1 Semester	06/01/2007	Pending

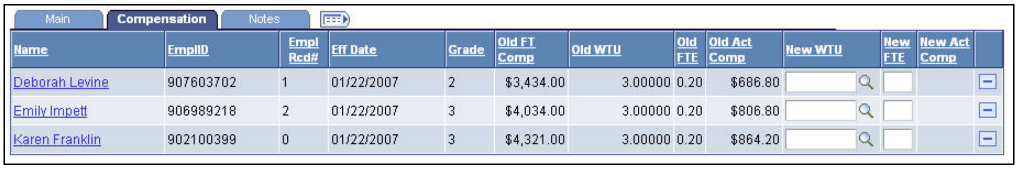
Figure 7-3 View of Main tab

2 If you click on Position, you can change the position number with the same job code and department ID to GFD or Trust.

7.2.2. Compensation tab

1 Click the Compensation tab.

The compensation tab contains twelve columns: Name, EmplID (Employee ID), Empl Rcd# (Employee Record Number), Eff Date, Grade, Old FT Com (Old Full Time Compensation), Old WTU, Old FTE, Old Act Comp, New WTU, New FTE, New Act Comp. Next to each row is a “minus” button. Clicking this button will delete the row corresponding to it.



Name	EmplID	Empl Rcd#	Eff Date	Grade	Old FT Comp	Old WTU	Old FTE	Old Act Comp	New WTU	New FTE	New Act Comp
Deborah Levine	907603702	1	01/22/2007	2	$3,434.00	3.00000	0.20	$686.80			
Emily Impett	906989218	2	01/22/2007	3	$4,034.00	3.00000	0.20	$806.80			
Karen Franklin	902100399	0	01/22/2007	3	$4,321.00	3.00000	0.20	$864.20			

Figure 8-8 View of compensation tab

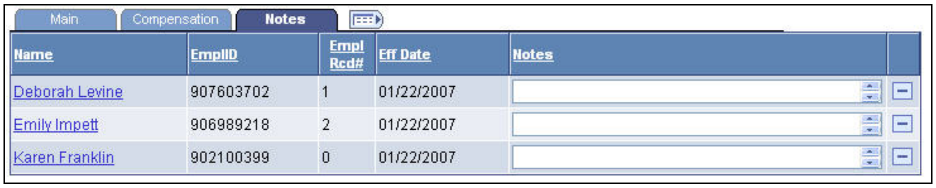
In the **Compensation** tab, you will indicate the new time base for each employee by entering units in the **New WTU** field or a decimal time base in the **New FTE** field. The values appearing in these fields default with what units or FTE was for the current appointment. Accordingly, double check this value to make sure it is appropriate for the current academic year/semester. You may enter WTUs or a time base. Entering values into either of these fields will auto-populate the other field with the valid value. For a listing of valid WTUs and corresponding time bases, you may click on the magnifying glass next to the **New WTU** field.

Also the **New Act Comp** (new actual compensation) will calculate based on the new FTE or WTU value you enter.

IMPORTANT: If you do not change any value on either tab, no transaction is required and the FTE (time base) will carry forward from the previous fall semester worked by the employee. Carefully verify your data in Express FTE (time base) Changes before submitting. If the time base for spring is NOT changing, click the minus button to remove the employee from the list.

7.2.3. Notes

The Notes section is intended for the purpose of informing the approvers of information relevant to the employee who is receiving a time base change. This tab contains five columns: Name, Empl ID (employee ID), Empl Rcd # (Employee Record Number), Effective Date and Notes. Next to each row is a “minus” button. Clicking this button will delete the row in which it lies. Reference the action-reason translation for guidance regarding what should be put in the Notes box.



Name	EmplID	Empl Rcd#	Eff Date	Notes
Deborah Levine	907603702	1	01/22/2007	
Emily Impett	906989218	2	01/22/2007	
Karen Franklin	902100399	0	01/22/2007	

Figure 8-9 Notes tab

1 Reference the action-reason translation for pertinent notes to be entered.

2 Enter the information in the Notes box.

3 Finally, you may submit this transaction by clicking **Save Work**, confirming your decision, then finally clicking **Submit**.

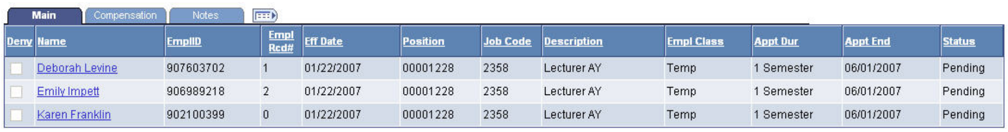
A view only page of the Express Reappointment page displays.

7.2.4. View Only Express FTE (time base) Changes Page

The Express Reappointments page contains the following pertinent information: E-TRAC ID and Approval History.

E-TRAC ID: The E-TRAC ID is used to track E-TRAC transactions. This number is generated by the system in a sequential order once a transaction is saved. Make note of this number in order to easily retrieve previous transactions.

Approval History: The Approval History section allows you to see at which stage the E-TRAC transaction resides. It also allows you to see who the next approver is.



Deny	Name	EmplID	Empl Rcd#	Eff Date	Position	Job Code	Description	Empl Class	Appt Dur	Appt End	Status
	Deborah Levine	907603702	1	01/22/2007	00001228	2358	Lecturer AY	Temp	1 Semester	06/01/2007	Pending
	Emily Impett	906989218	2	01/22/2007	00001228	2358	Lecturer AY	Temp	1 Semester	06/01/2007	Pending
	Karen Franklin	902100399	0	01/22/2007	00001228	2358	Lecturer AY	Temp	1 Semester	06/01/2007	Pending

Figure 8-10 View only of reappointed employees

7.3. After the E-TRAC is Submitted

After your E-TRAC request is submitted it is no longer available for you to update. You will receive an e-mail notification that your E-TRAC was successfully submitted. The E-TRAC request will be routed automatically to the first department approver for your area. They will also receive an e-mail notification, which will let them know that a transaction is waiting in their worklist for approval.

Each approver will have the ability to review and make changes to the E-TRAC request. Therefore, if you determine after you submitted the E-TRAC that you made a mistake, you can always ask one of your approvers to make the necessary change. You will receive an e-mail in the event that any changes were made to your E-TRAC request. Approvers are asked to either approve or reject each transaction. If a transaction is rejected, it is closed to any further updates, and cannot be reused.

After your department approvers have approved the transaction, it will be routed to the Budget Office and Human Resources, Safety and Risk Management. The transaction is finalized only after Human Resources, Safety and Risk Management has approved the transaction and loaded the record to the database. You will receive an e-mail message to let you know when this has happened and any new position or employee IDs that were created as a result of the process.

Note: The E-TRAC transaction that you have submitted will be viewable in the My E-TRAC Transactions section for 30 days. After 30 days you will have to select the Include Completed, then specify the number of days in the advanced mode of Sort/Filter My E-TRAC Transactions. For more information on viewing your E-TRAC Transactions see Chapter 3 Approving a Vacant Position Change.