



PHR Enhancement- Tiered Routing/Faculty Information

To PHR Creators & Approvers within the Division of Academic Affairs,
THIS MESSAGE CONTAINS IMPORTANT INSTRUCTIONS FOR BOTH CREATORS AND APPROVERS.

Effective today August 12, 2013 the PHR system has been modified to include additional approval levels for faculty appointments as well as the addition of specific faculty information for most appointments.

Additional Approval Levels in PHR

Most faculty appointment actions in PHR will now require additional approvals depending on the type of transaction. The additional approvals in PHR include Division/Dean, VP /Provost, OIS, VPR, UHR, or Graduate School approval. The system is programmed to automatically select and forward your transactions to the correct approval level based upon the action. PHR creators will not have to select the appropriate approver. Actions will not become "active" in PHR until the highest approval level for the action has been approved. E-mail notifications will continue to be generated for all applicable creators and approvers once the action has been released/approved. You can follow the approval progression in PHR by accessing the new " Approval Information" page. Access this page through the current appointment "Approval Path" page within the PHR appointment or at the top of the "Appointment Information" page when an action is awaiting approval. Approval progression information is also available on the "Approve Appointment" page.

Below is a detailed listing of faculty actions and their required approval level:

These faculty actions require VP/Provost approval

- All initial faculty appointments (Salaried, Hourly & Non-Paid)
- All faculty re-employment appointments
- All faculty tenure track terminal year appointments
- All faculty overloads
- All appointment actions for Deans, the Dean's Direct Reports & Department Chairs

These faculty actions require Division/Dean approval

- New appointments for existing faculty
- Current appointment change to FTE
- Current appointment change to salary
- Current appointment salary addition
- Current appointment termination
- All faculty non-standard Pay appointments
- All faculty summer research/pay appointments
- All faculty summer school appointments created outside of OES

These faculty actions require Department/Unit approval

- All contractual faculty (Cat Stat 25) appointments
- Faculty LWOP
- Sabbatical leave
- System access
- Appointment funding changes

- Faculty winter term appointments
These faculty actions require VPR approval
- Intergovernment Personnel Act (IPA) appointments and/or and IPA salary additions
These faculty actions require OIS approval
- Non-Paid faculty appointments for employees on a visa (except visa type CB, PR, OS, PA, AS, PT, RF)
These GRADUATE ASSISTANT actions require Graduate School approval
All overload appointments for graduate assistants & graduate hourly employees
These STAFF actions require UHR approval
- All staff overload appointments
- All staff salary additions (except health & retirement)

Approving Actions in PHR

Approving actions in PHR remains unchanged. You can access actions by searching for individual records by UID or name, once an approve email notification is generated by the PHR system, or you can approve groups of transactions from the PHR "search" page under the process menu. However, there are a few tips to keep in mind depending on your specific approval access in PHR:

VP/Provost approvers:

- Approve records by searching for individual records (UID, name) once the PHR system generates an approve email.
- Approve records by utilizing the process menu on the PHR "Search" page. Leave "All Units" selected in the unit dropdown menu and click either "Approve Changed data" or "Approve New Appointments". You will see all actions that have received unit, department, and division approval and are currently awaiting VP/Provost approval.
- Approve records by utilizing the process menu on the PHR "Search" page. Select a specific unit from the unit dropdown menu and click either "Approve Changed data" or "Approve New Appointments". You will see all actions that may have received unit, department, or division approval. So, these actions may NOT be ready for your approval. This is an intentional design feature for those approvers that have multiple approver access (i.e. division and department). From these lists you must choose the specific records you would like to approve and should NOT approve all records unless you are certain the record is ready for your approval at your intended access level.

Division approvers:

- Approve records by searching for individual records (UID, name) once the PHR system generates an approve email.
- Approve records by utilizing the process menu on the PHR "Search" page. Leave "All Units" selected in the unit dropdown menu and click either "Approve Changed data" or "Approve New Appointments". You will see all actions that have received unit and department approval and are currently awaiting division approval.
- Approve records by utilizing the process menu on the PHR "Search" page. Select a specific unit from the unit dropdown menu and click either "Approve Changed data" or "Approve New Appointments". You will see all actions that may have received unit and department approval. So, these actions may NOT be ready for your approval. This is an intentional design feature for those approvers that have multiple approver access (i.e. division and department). From these lists you must choose the specific records you would like to approve and should NOT approve all records unless you are certain the record is ready for your approval at your intended access level.

Department/Unit approvers:

- Approve records by searching for individual records (UID, name) once the PHR system generates an approve email.

- Approve records by utilizing the process menu on the PHR "Search" page. Leave "All Units" selected in the unit dropdown menu (if available) or use your specific department/unit default and click "Approve Changed data" or "Approve New Appointments". You will see all actions that have received unit approval or have been released by the unit creator and are currently awaiting department/unit approval.
- Approve records by utilizing the process menu on the PHR "Search" page. Select a specific unit from the unit dropdown menu and click either "Approve Changed data" or "Approve New Appointments". You will see all actions that may have received unit approval. So, these actions may NOT be ready for your approval. This is an intentional design feature for those approvers that have multiple approver access (i.e. division and department). From these lists you must choose the specific records you would like to approve and should NOT approve all records unless you are certain the record is ready for your approval at your intended access level.

VPR, UHR, Graduate School, OIS approvers:

- Approve records by utilizing the process menu on the PHR "Search" page. Leave "All Units" selected in the unit dropdown menu and click either "Approve Changed data" or "Approve New Appointments". You will see all actions that are currently waiting for your approval.

Additional Faculty Information required in PHR

There are additional faculty information requirements in PHR. The additional information is largely contained to the "Faculty Information" page within the faculty appointment in PHR. However, all faculty education information is also required through the employee "Education" page in PHR. New information required on the "Faculty Information" page includes:

- Faculty duration dates (selected from dropdown menu or enter "other" dates depending on faculty appointment)
- IPA appointment information (duration dates each time an employee participates in an IPA)
- State agency information (if the employee is working concurrently at another state agency)

Please contact the PHR Customer Service Center for any questions concerning the new faculty functionality in the PHR system. We can be reached at 301-405-7575.