Temporary/On-Call – Change of Position

This redesigned form is in addition to the already redesigned forms used to process hire, rehire and additional assignments for Temporary and On-Call employees. This document covers the Change Position form for employees moving from a student position to a Temporary or On-Call position with no break in service.

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Selecting the Employee

1. Click on **Unit Administrator** → **Administrative Services** → **Temporary and On Call Employees: TOC Processes**

   ![Select Employee](image)

2. Search for the employee by entering either their SSN or their PID
3. Enter the **Start Date** of the employee or use the search box to bring up a calendar to choose the correct date
4. Click **Search Employee** button

5. For employees with existing assignments, it shows information on those assignments grouped by PERNR and sorted with the most recent actions first. If the start date entered falls after all current assignments, only termination records appear. If this is the correct employee, click **Create Position** button.
Creating the Position

The next phase is to create the position into which the Temporary or On-call employee will be employed.

Position Attributes

6. Select an **Organization Unit** either by selecting from the drop down menu or typing in the correct organization unit code. Press enter to populate the organizational unit name if the drop down menu is not used.

7. Select a **Job Title** either by selecting from the drop down menu or typing in the job title code. Press enter to populate the job title name if the drop down menu is not used.

8. Click **Next Step Enterprise Structure** button.
Enterprise Structure

9. The allowed enterprise structure combinations will display. Select an Enterprise Structure by clicking the gray box to the left of the combination. This will highlight the row. If there is only one option the selection will already be highlighted.

10. Once highlighted, select Next Step Position Description button.

Position Description

11. Type in a detailed description of job duties in the section provided, Position Description. Once completed, click Next Step Supervisor button.
Supervisor

12. Search for the **Supervisor** by selecting the search box or by typing in the correct Supervisor position ID. The name will populate into the spaces provided. Once the name appears, click **Next Step Building Address** button.
Administrative Address

13. Select **Location ID** either by selecting from the drop down menu or typing in the correct Location ID. Press enter to populate the location id name if the drop down menu is not used. If applicable, type in the **Room number** in the space provided. Type in the **Telephone Number** in the space provided. All other address information will populate in the spaces provided. If all the information is correct, click **Position Overview** button.
Position Overview

14. The last step in creating the position is the Position Overview. Review the position information for accuracy, clicking the tabs to view each subject. You may change editable fields as needed. Once you have determined the position is correct, click the Change Position button to proceed.

Saving the Form
If at any point you wish to save the form and finish it later, click the Save Draft button at the top of the window. When you close the window, the system saves a draft of the form to your HR Inbox. At any time you can click the link in the HR/Payroll Inbox to open the form and complete it.
Placing the Employee in the Position

Tips and Tricks

You move through the steps in the process using buttons at the top of the screen.

- Click the **Next** button to validate the information on the screen and advance to the next step. Any errors must be corrected before moving forward. Because options presented are based on information previously entered, you are less likely to encounter errors.
- Click the **Previous** button to go back to the previous screen.

You can also:

- Click any step in the **Navigation Bar** to go directly to that section of the form.

Here are some additional tips for completing the form:

- Use the Tab key on the keyboard to move from field to field.
- Where you see a **search** button, you can press the F4 key to open the search window, rather than clicking on the button.
Personal Details

15. Review and enter **Personal Details**. Required fields are marked with a red asterisk. If the field is grayed out this field is not editable. Click **Next** button to continue.
   a. Please note that you can expand the Data Changes title at any time to compare old and new values
## Data Changes

<table>
<thead>
<tr>
<th>Field</th>
<th>New Value</th>
<th>Old Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Address</td>
<td>BERKEY HALL</td>
<td></td>
</tr>
<tr>
<td>Administrative Address Addr</td>
<td>509 E CIRCLE DR RM 100</td>
<td></td>
</tr>
<tr>
<td>Administrative Address Buildi</td>
<td>000000002</td>
<td></td>
</tr>
<tr>
<td>Administrative Address City</td>
<td>EAST LANSING</td>
<td></td>
</tr>
<tr>
<td>Administrative Address Country</td>
<td>USA</td>
<td></td>
</tr>
<tr>
<td>Administrative Address Postal</td>
<td>48824</td>
<td></td>
</tr>
<tr>
<td>Administrative Address Room/n</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Administrative Address State</td>
<td>Michigan</td>
<td></td>
</tr>
<tr>
<td>Administrative Address Telpho</td>
<td>+15171224557</td>
<td></td>
</tr>
<tr>
<td>Assignment end date</td>
<td>05/27/2014</td>
<td>//</td>
</tr>
<tr>
<td>Employee Subgroup</td>
<td>AC</td>
<td>A0</td>
</tr>
<tr>
<td>Employment percent</td>
<td>100.00</td>
<td></td>
</tr>
<tr>
<td>F-9 Entry date</td>
<td>//</td>
<td>05/19/2013</td>
</tr>
<tr>
<td>Job Description</td>
<td>Professional Aide</td>
<td>Student Info Tech Assistant IV</td>
</tr>
<tr>
<td>Job key</td>
<td>20002037</td>
<td>20002076</td>
</tr>
<tr>
<td>Name of EE subgroup</td>
<td>Hourly-Tempo</td>
<td>Student</td>
</tr>
<tr>
<td>Organizational Unit Description</td>
<td>ANR COMMUNICATIONS</td>
<td>BIOCHEMISTRY &amp; MOLECULAR BIOLOGY CHM</td>
</tr>
<tr>
<td>Organizational unit</td>
<td>10002034</td>
<td>10022096</td>
</tr>
<tr>
<td>Pers. subarea text</td>
<td>Professionals</td>
<td>Other EE</td>
</tr>
<tr>
<td>Personnel subarea</td>
<td>AP</td>
<td>OTEE</td>
</tr>
<tr>
<td>Position</td>
<td>302234743</td>
<td>30224481</td>
</tr>
<tr>
<td>Position Area</td>
<td>T000120</td>
<td>D008160</td>
</tr>
<tr>
<td>Position Tax</td>
<td>Professional Aide</td>
<td>Student Info Tech Assistant IV</td>
</tr>
<tr>
<td>Supervisor Position</td>
<td>50046541</td>
<td></td>
</tr>
<tr>
<td>Work Schedule Rule</td>
<td>Temporary Employee</td>
<td>STANDSTU</td>
</tr>
</tbody>
</table>
Organizational Details

16. Review and enter Organizational Details. All required fields are marked with an asterisk. We now have a new functionality where users can change the position information on the form with the exception of changing the employing organizational unit. If a field is changed this adjustment may require a new selection in a different field.
   a. Note that you can save a draft of the form at any time and come back to it later

17. When the Organizational Details have been reviewed and all required fields are filled, click Next.
Contact Information

18. Review and Enter **Contact Information**. All required fields are marked with an asterisk.

19. When the Contact Information has been reviewed and all required fields are filled, click **Next** button.
20. Enter **Pay and Cost** Information
   a. Please note:
      i. At least one of the account funds must end in “12/31/9999”
      ii. When clicking the Fund field, there is a drop down menu option. Search for and select a **Fund**. If you have created a Personal Value List, you may have to press F4 to override your personal values. If you type the account number, press Enter after typing it to default the other required accounting information.
      iii. If necessary, search for and select other funding elements. If a WBS Element (sub-account) does not appear in a row after the account number is entered this means that there is more than one option for that account. If no sub-account is entered, WBS Element defaults to “No_Sub-Account.”
      iv. To add more rows, click the **Add Row** button and repeat the above steps.
      v. To remove a row, click the **Remove Row** button.
   21. When all Pay and Cost Information has been entered, click **Next** button.
22. Review and change (if necessary) the **Additional Information**
   a. Please note:
      i. If the employee does have a relative working in the same department, you must insert their name in the field provided (after clicking the ‘yes’ radio button)
      ii. If the employee has ever been convicted of a crime or has any charges pending against them, there is an option to provide details of such instances (after clicking the ‘yes’ radio button)
   23. When all Additional Information has been reviewed/changed, click **Next** button.
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Attachments and Comments

24. Attachments and Comments gives you the option to attach any required documents, gives you important links for documents you may need and gives you the option to provide comments you may want approvers to see.

25. When you completed adding comments and attachments, click Next button.

There are no required attachments for hiring a Temporary or On-call employee. However, you have the option of attaching a document to the form. Important Links at the bottom of the screen provide links to policies and procedures that may apply, and to forms that can be attached and submitted. Review this information as needed.

To enter comments and attach documents
1. Upload the required attachments indicated.
2. Enter any comments in the New Comments field.
3. Click the Next button.

To upload an attachment
1. Select the attachment being uploaded from the Attachment Type drop-down list.
2. Click the Browse button to locate and select the attachment.
3. Click the Upload button to attach the file.
4. If desired, check the box for the attachment.
Summary Form

The Summary of the Form gives you one last chance to review everything you have entered and gives you any warning messages needed.

Click the Check button to have the system perform a final check of the information. Correct any remaining errors.

At this point you can generate a PDF by clicking the Generate PDF button. The PDF version of the form opens in a new window, and can be saved or printed. As the form routes for approvals, approvers are able to view the form as a PDF by clicking the Generate PDF button.

After review of the form click the Send button to send the form into workflow

Review Form and Confirmation

You are now ready to send the form for approval.

Upon successful submission, the HR/Payroll system displays a process reference number.

26. This is the confirmation that your form has been submitted. Please note the form reference number which can be found in two places. This is important to have in order to track your form and/or give to Central HR for status updates or issues that may arise.

The form then enters workflow. The form routes for all unit approvals, then goes to Central HR. Central HR reviews the form, verifies receipt of the hard copy Form I-9 if applicable, then approves the form and updates the HR/Payroll system.

As the form routes for approvals, approvers are able to view the form via the Summary Screen or as a PDF by clicking the Generate PDF button.

Attachments are an important part of the process. To ensure that all appropriate attachments are available to all approvers, approvers cannot add or remove attachments. If attachments must be changed, the approver should reject the form back to the initiator.
Additional Information

- Reference guide General Instructions and Tips for New HR/Payroll Forms for information on the new forms, including more specifics on topics such as error messages, auto-complete and saving drafts.
- Quick guide Personal Value Lists, on how to create and use Personal Value Lists.