# APR (Appointment Process Redesign) Transactions -Glossary

# **APR (Appointment Process Redesign) Transactions - Glossary**

#### Add attachment (button)/add an attachment (link)

When clicking this button or link, files can be browsed to be attached. File types that can be attached include docx, doc, gif, html, jpg, msg, pdf, ppt, rtf, tif, txt, xls, or xlsx.

# Additional pay details (Academic only)

The Additional pay details fields are read-only: Appointment Pay Dates, Fiscal Year Pay Dates, Monthly Gross Pay, Fiscal Year Charge Dates, Monthly Distribution Charge, and Total Pay/Charge for FY20XX. The form automatically calculates the displayed values from your entries in the Begin and End Work Dates, Pay Basis, and Annual Salary fields.

#### Address Line 1

Required for all home addresses.

#### Address Line 2

Optional field for additional address information.

#### **Annual FTE Salary**

A read-only calculation of the employee's full time equivalent (FTE) salary. The value will be the same as the annual salary for employees who work 100% effort. This field appears for all positions or appointments with 12 month standard pay basis.

#### **Annual Salary**

A numeric input field for monthly paid positions or appointments. Enter the actual salary you want the employee to receive for a full year. For example, for an employee working less than 100%, enter the same percent of the Annual FTE salary. **Note:** Faculty additional jobs and Affiliate jobs show read-only an Annual Salary of \$0.00.

# **Appointment Date Range**

The from and to dates of an appointment.

#### **Appointment End Date**

Read-only date for when the appointment ends. Records for employees who do not have an end date will show 'None' in this field.

# Appointment History (link)

Clicking on this link will launch the employee appointment history report in a new window. This report displays the history of an employee's employment with MIT, including all appointments, beginning in August 2003. There are additional links from this report available to display prior history and other supplemental payment information. Appropriate Data Warehouse authorizations are required.

# **Appointment Pay Dates**

Time period over which the person will receive salary payments. In most cases, the Appointment Pay Dates are the same as the Total Appointment Work Dates, except for employees paid on the 9 month Modified Annual Plan (MAP).

# Approve (button)

After reviewing the transaction details, an approver can select Approve to either move the transaction to the next approver or to the HR/Payroll center for processing.

# Approved waiver of posting? (Non-academic only)

Yes/No radio button options for Promotions and Transfers. MIT requires that open positions be openly posted to ensure equal opportunity recruitment. In some cases, however, the hiring department, lab, or center will request a waiver from this posting policy because they have already identified a preferred candidate whose special skill sets and qualifications best meet their

needs. If this field is checked, posting has been waived for the position.

# Approver

A list of possible approvers in the affected department, lab, or center. A check box is associated with each name for easy selection of one or more approvers.

# Asterisk \* symbol

Indicates a required field.

# Attach (button)

After browsing a selecting a file, hitting the Attach button will attach the document to the transaction.

# **Authorized Approver**

Enter the email address of the person who will approve the transaction.

# Begin FY Pay Date (Academic only)

Read-only. For MAP appointments this is the date pay begins in current fiscal year, for non-MAP appointments this is the same as Begin Work Date.

#### **Begin Leave Date**

First day employee will be on leave. Sabbatical: Choose 01/16/20XX or 09/01/20XX.

# **Begin/End Leave Dates**

Displays the date range of a leave of absence.

# Begin Pay Date (Academic Only)

Read-only. For MAP appointments this is the date pay begins; for non-MAP (Modified Annual Plan) appointments this is the same as begin work date.

# Begin Work Date (Academic only)

Academic only. The format is mm/dd/yyyy. For MAP appointments this is typically at the beginning of a term, e.g., 09/01/20XX or 01/16/20XX. For non-MAP appointments this is the begin date of the appointment. Dates from 6/1-8/31 are not allowed for MAP appointments. If the appointment begins after the start of an academic year, use the actual date, e.g., 02/20/20XX.

For Extend Appointment actions, if the appointment has a 12 month standard pay basis, the Begin Work Date defaults but is editable. If the appointment has a 9 month pay basis, the Begin Work Date must be entered.

#### Building

Building of employee's primary work address. May be an MIT building or off-campus.

#### c/o

Care of. Use this field if a name other than the employee's is associated with the address.

#### Cancel Roles Auths Date (formerly: Roles authorizations alternative cancellation date)

If it is different from the Termination Date, enter the end date for the employee's authorizations. For example, you could extend the date on a credit card until ordered supplies have been delivered. An explanation is required if the alternative cancellation date is more than 30 days out from the termination date.

#### **CC** these Addresses

Enter a comma delimited list of email addresses of individuals who have a business need for being notified about the action. Only basic information related to the transaction will be sent – Employee name, MIT ID, Appointments, Effective Date, Transaction type, Reason, Prepared by.

# Charge to Off Campus

Yes/No radio buttons. Select **Yes** if the person will work primarily off the main campus and the salary is budgeted at off-campus F&A rates.

# Citizenship

Details of the employee's citizenship status. This always includes Nationality and may include Residence Status, Visa Type, and Visa Date Range.

#### City

Required for all home addresses.

# Comments

Use this section to enter comments. Although in general this field is optional, comments to support the transaction may be required by local Department and Assistant Dean approvers. In addition, there are certain transactions that will trigger required comments. The Comments section will display a history by date and time of both the comments entered and the action taken by each of the individuals involved in the transaction. Also included in the Comments section is a system log of changes/edits that were made to the original transaction.

# Copy (button)

Any transaction (except for Terminations and Other Actions) created after the implementation of the Copy feature in April 2013 can be chosen to be copied by viewing the transaction and hitting the Copy button. The Copy button will also be available on the Confirmation page when finishing a transaction. Most of the transaction details entered on the original transaction will be displayed and can be changed or left with the original value. Some information, such as salary and personal information on a hire, will not be copied and must be entered.

# **Cost Object**

The cost object(s) to charge for this person's salary. A valid entry is 7 digits. For unpaid appointments, the cost object should be a Cost Center.

# Country

Required for all home addresses.

# **Curr Hire Date**

The last hire date for the employee. This will be the same as the Orig Hire Date unless the individual left MIT and was rehired at a later date.

# **Current Annual Salary**

Monthly paid only. Read-only display of employee's current salary.

#### **Current Rate of Pay**

Hourly paid only. Read-only display of employee's current rate of pay.

# Date of Birth

The employee's date of birth. Example: 12/16/1980.

# **Dean's Office/Area Approver**

A list of possible dean-level approvers in the affected department, lab, or center. Each name in the approver list has a corresponding check box for easy selection of one or more approvers.

# **Department Name**

The name of the Department, Laboratory, or Center.

# **Department Number**

The 6-digit department number.

# **Department Number/Name**

For Transfers, if the Initiator has authorizations for more than one department, lab, or center, a drop-down list is provided for easy selection of the correct department.

# **DLC Approver**

# See ist:Approver.

# Do you want to delimit position number [ist:XXXXX]?

The default selection is No. Select Yes if the position is obsolete and will not be filled in the future.

#### Do you want to Open or Save (file name)?

By double-clicking on a file attachment name, you will be prompted to either Open or Save the document. Select Open to view

the contents of the file; a new window will open to display the contents. Select **Save** to save a copy of the file; you will be prompted for the destination and name of the new file to be saved.

# Edit (button)

After reviewing the transaction details, an approver can select Edit to change any of the details of the transaction. If any approver edits the transaction, the initiator will get an email indicating that the transaction has been edited once the transaction is fully approved.

#### **Effective Date**

The date your requested action takes effect.

# Employee

As the Initiator begins entering a last name or MIT ID, a list of possible matches appears. Initiator must select a name from the list. Initiators will not see their own names on the select list.

# **Employee DLC Approver**

Select the approver(s) from the employee's area.

# **Employee MIT ID**

Read-only field displays the ID associated with employee selected for the action.

# **Employee Name**

Read-only field displays the employee name selected for the action.

# Employee Profile (link)

Clicking on this link will launch the employee profile report in a new window. This report displays a snapshot of the current employment information for a person. Appropriate Data Warehouse authorizations are required.

# Employee Replaced (Non-Academic only)

Enter the name of the employee who previously held the position.

# **Employee Subgroup**

Identifies whether the person belongs within the weekly or monthly payroll.

# Employee within my area of responsibility?

Yes/No radio buttons. Defaults to **Yes**. Select **No** if the employee will not be in your area on the effective date of the action, otherwise leave the default selection.

# End Date

For limited or short term positions, enter the last day of the appointment, e.g., 12/31/20XX. For positions without end dates, enter 12/31/9999.

# **End Leave Date**

Last day employee will be on leave.

# End FY Pay Date (Academic only)

Read-only. For MAP (Modified Annual Plan) appointments, this is the date pay ends in current fiscal year. For non-MAP appointments, this is the same as end work date or end of current fiscal year (6/30), whichever is earlier.

#### End Pay Date (Academic only)

For MAP (Modified Annual Plan) appointments, this is the date pay ends. For non-MAP appointments, this is the same as end work date.

# End Work Date (Academic only)

The format is mm/dd/yyyy. Academic only. For MAP appointments this is typically at the end of a term, e.g., 01/15/20XX or 05/31/20XX; for non-MAP appointments this is the end date of the appointment. Dates from 6/1-8/31 are not allowed for MAP appointments. If a faculty appointment has no end date, enter 12/31/9999.

#### **Enter Position Number**

Enter the position number and then click the Get position data button.

# **Estimated Salary**

For non-exempt employees. Calculation: rate of pay x normal work week x 52 weeks.

#### Extend Leave (Button)

The employee will not return by the original expected return date on the Leave of Absence request.

Faculty Sponsor (Academic non-faculty only)

Enter the name of the faculty member who is sponsoring the employee.

# **File Name**

The file name of a file attachment.

#### **Fiscal Year Charge Dates**

Read-only dates in the current fiscal year that the cost object(s) will be charged for this person's salary. Except for employees paid on the 9 month Modified Annual Plan, the Fiscal Year Charge Dates will be the same as the Fiscal Year Pay Dates.

# **Fiscal Year Pay Dates**

Read-only. Time period over which the person will receive salary payments in the current fiscal year. If the appointment does not extend beyond the current fiscal year, these will be the same as the Appointment Pay Dates. FY Pay Dates for a one year appointment with a 9 month Modified Annual Plan pay basis would be 07/01/20XX - 6/30/20XX.

#### Foreign-source fellowship? (Academic only)

Yes/No radio buttons. Default to **No**. Foreign source fellowships have special tax consequences. Contact Payroll for further information.

# Gender

Choose Male or Female to indicate the employee's gender.

# Get position data

On clicking the Get position data button, the Job Title field displays and the Position Title defaults to the Job Title.

# hide changes (link)

Clicking on this link will hide the before and after values of each field that has been changed from the original transaction. The default view will not show the changes.

# Hide other appointments

Click this button to hide the additional appointments for the employee.

# Highest Degree (Academic only)

If education information is in SAP, the highest degree is displayed along with the field of study, e.g., Doctoral degree -Engineering.

#### Human Resources Officer

Displays the name of the employee's HRO.

#### I-9

The employment eligibility verification form.

#### Initiator DLC Approver

Select the approver(s) from your area.

# **Job Attributes**

Read-only text includes ist:Personnel area, ist:Pers. Subarea, ist:Employee Subgroup, ist:Tenure Code, and ist:Pay Grade. These same fields are displayed on the job title search results page to help differentiate between similar job titles, and are individually defined in this glossary.

#### Job Code

Read-only. Each job has an associated title and code. For example, Postdoctoral Fellow is HR-CC010.

#### Job Title

A job title defines the job held by the employee, e.g., Professor, Business Analyst, or Administrative Assistant II. It is often more generic in nature than a position title.

#### Last Day Worked

If the last day worked is different from the Termination Date, enter the date in this field. Unemployment benefits require reporting of the last day worked.

# Leave Duration

Sabbatical: Choose One Semester or Two Semesters.

# Leave Type/Category

Displays selections made by Initiator, for example, Sabbatical/With pay.

# Legal Name

The employee's full, legal name as shown on the employee's driver's license, social security card or other legal document.

# MIT ID

Enter the 9-digit MIT ID number to find an employee not in your area.

# Monthly Distribution Charge (Academic only)

Monthly charge to the cost object(s) for this person's salary. For MAP (Modified Annual Plan) appointments, this is the annual salary/9, otherwise Annual Salary/12.

#### Monthly Gross Pay (Academic only)

Monthly gross salary to be paid to this person.

# Name Prefix

The form of address to be used in letters sent to this person. Possible values: Mr., Ms., Dr., or Prof. Gender specific prefixes (Male - Mr.; Female - Ms.) must match the employee's gender on record.

# Name Suffix

The suffix (such as Jr., III., etc.) that is part of the employee's full, legal name.

# Nationality

The employee's national status. Select from drop-down list.

#### **New Annual Salary**

A numeric input field for monthly paid positions or appointments. Enter the actual new salary you want the employee to receive for a full year.

# New Expected Return Date

If a leave is extended, this is the new first day the employee is expected back to work.

#### New Rate of Pay

A numeric input field for hourly paid positions. Enter the new rate of pay you want the employee to receive.

# Normal Work Week (Hourly paid only)

This is the work week schedule associated with the individual employee. **Note:** Normal work week must be between 1 - 40 or 1 - 42.5 for Campus Police.

# **Notification To**

A read-only list of any CC email addresses entered by the Initiator.

#### **Orig Hire Date**

The first hire date for the employee. This will be the same as the Curr Hire Date unless the individual left MIT and was rehired at

a later date.

# **Original Job**

The job on the first appointment record in SAP.

# Outside Appointment (Faculty only)

Faculty only. Indicate if faculty member will/does hold an appointment at Broad, Howard Hughs Medical Institute (HHMI), or Whitehead Institute.

# Org. Unit #

The Org Unit that is paying for the supplement (e.g., 1000XXX). Supplemental Pay that is not associated with the regular work performed by the employee requires entry of the Org Unit that is paying for the Supplement. **Note:** The field defaults to the Initiator's Org Unit #.

# Org. Unit Title

Displays the title associated with the org unit number.



# (paperclip symbol)

The paper clip symbol indicates that there is an attachment on the transaction. This symbol appears on the Inbox summary page and the summary of transactions as a result of a search when using the View a Transaction function.

# Pay Basis (Academic only)

Typically a drop-down list.

Paid appointments: Choose whether this employee has a 9 month modified annual plan (9 month academic year appointment paid over 12 months), a 9 month standard (9 month academic year appointment paid over 9 months), or a 12 month standard appointment. Faculty appointments default to 9 month modified annual plan.

Unpaid appointments: Choose whether employee has a standard 9 month or 12 month appointment.

#### Pay Grade

A one-character code used by HR Compensation to identify pay ranges. Academic employees, who do not have salary ranges, have a Pay Grade of ALL.

# **Payment Amount**

Maximum payment amount is \$100,000.00.

One Time Payment: The amount to be paid in a single payment. Ongoing Payment: Enter either the monthly amount to be paid or the total amount to be paid. Select corresponding Monthly or Total radio button.

#### **Payment Type**

One Time Payment: default selection, a single payment.

Ongoing Payment: multiple payments made to eligible monthly paid employees within a date range.

# Percent (Cost object percent distribution)

The percentage of total distribution for each cost object. The total percent of salary distributed must equal 100%.

#### Percent Change (in salary or rate of pay)

Shows the percent change between current pay and new pay.

# Percent Effort

The percent of work effort for an employee in a given appointment (100%, 80%, 50%, etc.). Numeric input field allows up to 6 characters, e.g., 100.00. If an employee has more than one appointment, the total percent may not exceed 100%. Exception: Sabbaticals select either 50% or 100%.

**Note:** Faculty additional jobs show a read-only Percent Effort of 0%. Affiliate jobs default the Percent Effort to 10%; this is editable.

#### Pers. Subarea

4-character code further refines the definition of the personnel area. For example: Admin Staff, Support Staff, etc.

# Personnel Area

A 4-character code that defines the personnel type and MIT location of employees who are or will be appointed to a position. For example: Campus-Academic, Campus Non-Academic, Lincoln-External, etc.

# Phone

The employee's 10-digit home phone number. Example: 617-555-5555.

#### Position

Required field for Supplements. For employees with more than one appointment, a drop-down list is provided. Select the position that will receive the supplement.

# **Position Number**

Numeric input up to 5 digits. Every existing position, both filled and vacant, has a position number.

#### **Position Number/Title**

Display of the employee's position number and position title, e.g., 11298 - Business Analyst.

# **Position Title**

A Position Title is a specific role within a department, lab, or center, that may or may not match the Job Title, e.g., Job title: IT Consultant II vs. Position title: Voice/Data Coordinator. This text input field defaults to the same text as the Job Title, but can be edited. Max. 50 characters. Exception: Affiliate position titles cannot be modified.

#### **Prepared By**

Read-only display of the Initiator's name and email address.

# **Prepared On**

Read-only display of the date the action was created.

# Rate of Pay

A numeric input field for hourly paid positions. Input the rate of pay you want the employee to receive.

### Reason for leave

Enter details about the reason for the leave.

#### **Reason for supplement**

Displays the supplement reason selected by Initiator.

#### Reject (button)

After reviewing the transaction details, an approver can select Reject to either delete the transaction or Return the transaction to the initiator for changes. If Reject is selected, the transaction is no longer visible or available for further review or processing. The initiator will get an email indicating that the transaction has been rejected.

#### Return (button)

After reviewing the transaction details, an approver can select Reject, then Return to send the transaction back to the initiator for changes. The initiator will get an email indicating that the transaction has been returned for changes.

# **Residence Status**

If the employee is not a US citizen, choose Non-citizen (Perm resident) or Non-resident.

# **Return Date**

First day employee returns to work.

# Return from leave (Button)

This action shall be completed when an employee returns from leave.

#### Room

The room associated with the employee's permanent work address.

# Search for Job Title

Text input field to search for a job title. Entering one or more characters and pressing the Search button will result in a list of all job titles that have the same characters in the same order. The more characters entered the shorter the list of results. For example, entering 'fellow' will result in several choices while entering postdoctoral fellow will result in just 2 choices – postdoctoral fellow and senior postdoctoral fellow. Do NOT enter abbreviations – pd fellow, sr, etc.

# Selected Employee Info

After selecting an employee from the Employee autocomplete list, pertinent information appears in the Selected Employee Info field including [ist:Last name], [ist:First name] ([ist:MIT ID], [ist:Position number - Position Title], [ist:Percent Effort], [ist:Department]). E.g., Smith, Joe (900042311, 1345 - Business Analyst, 100%, Information Services and Technology)

# Shift Eligibility (Hourly paid only)

A shift-eligible employee can report time worked on second or third shifts and receive a differential pay rate.

#### show changes (link)

Clicking on this link will display the before and after values of each field that has been changed from the original transaction. The default view will not show the changes.

#### Show other appointments

Click this button to see additional appointments for the employee.

# Size

The size of the file attached.

# Specify position or job

For actions that involve new positions or appointments, such as Transfers or Promotions, the Initiator selects a radio button to enter a position number (default selection) or to Search for a job title. Choosing a job title will automatically create a new position number when the transaction has been completed.

#### Sponsoring Agency (Academic only)

This text input field appears for postdoctoral fellow appointments. Enter the full name of the agency that is sponsoring the employee being appointed.

# State/Province/Region

Required for US and Canada.

#### Status

Current state of the action.

# Submission Date

Search the date or date range for which the original transaction was submitted.

# Submitted [ist:date]

The date the action was created and submitted.

# Supplement date range

Enter the From and To dates of an ongoing supplement.

# Temp Increase Start Date (Non-Academic only)

This read-only field appears in the End Temp Increase action as reference information regarding when the temp increase became effective.

# Tenure Code (Academic only)

Read-only. Appears on job title results page and in the job attributes. Possible values: Tenured, On tenure track, Not on tenure track.

# Tenure Track (Academic only)

Read-only text. Possible values: Tenured, On tenure track, Not on tenure track. Faculty appointments, other than Coaches, are almost always tenure track.

# **Termination Date**

The final date of employment at the Institute.

Note: Valid termination dates for Faculty are May 30, May 31, or June 30.

# **Time Group**

All hourly paid positions must be linked to a Time Group. Time Groups are used to group non-exempt employees for the purpose of approving time. A drop-down list of valid time groups for the department is provided. If 'Other' is selected from the list a text input field appears for manual entry of a time group.

# Total Pay/Charge for FY (Academic only)

Total amount the person will be paid in the current fiscal year and that will be charged to the cost object(s) for the person's salary. This calculation is based on Fiscal Year Pay Dates and Monthly Gross Pay.

#### Transaction #

The system generated number associated with all actions.



(trashcan symbol)

The trashcan symbol appears to the left of the transaction number on the inbox summary or to the left of the file name of an attachment. Clicking the trashcan will delete the transaction or attachment.

#### Туре

Transaction type.

# Uploaded By

The user name of the person who attached the file. Both initiators and approvers can attach files.

# Uploaded Date

The date and time a file was attached.

# Vacation balance to be paid

Based on an employee's eligibility and exempt/non-exempt status, vacation balance must either be entered or is calculated automatically.

Hourly paid and vacation eligible - A message displays, 'Automatic payout.'

Exempt and vacation eligible - Enter the number of days from -5 to 45.

Not vacation eligible - A message displays, 'Not eligible.'

# Visa History (link)

Clicking on this link will launch the visa history report in a new window. This report displays an employee's visa history, including the visa type, issue and expiration date. This link will not appear if there is no visa history for an employee. Appropriate Data Warehouse authorizations are required.

# Visa Type

The type of US visa issued to the individual.

# Visa Status End Date

The date the visa expires. Appointments must end at the same time or before the current visa expires.

# Visa Status Start Date

The date the visa starts.

#### WebHire Requisition # (Non-Academic only)

The number created when HR Staffing Services has created a Webhire requisition for the position, e.g., mit-00006284.

# Work Schedule Rule (Non-exempt only)

A department's full time scheduled work week (e.g., 35, 37.5 or 40 hour work week). Campus Police have 42 hour work schedules.

#### Wkly Hrs

# Abbreviated form of Normal Work Week.

# Work Phone

I

1

1

The employee's 10-digit primary office phone number.

# Would you hire/reappoint?

Choose a response by clicking on the corresponding radio button.

# **ZIP/Postal Code**

Required for US (use format 99999 or 99999-9999) and Canada (use format A9A 9A9).