Initiate an Extension of a Job with an Extended Expiry Date

Purpose

Use this transaction to extend an appointment that has an expected end date. This includes Fixed-term research, limited term or temporary, Postdoc, Postgrad, Grad Salaried and FHObO salaried appointments.

Users can also change accounting when extending a job and as indicated in the note below, users can also change compensation when extending an appointment for Postdoc, Postgrad, Grad Salaried and FHObO salaried appointments.

In these situations there is no need to submit separate job change transaction when the form accommodates multiple changes.

| Note | Step 8: This step applies only to Postdoc, Postgrad, Grad Salaried and FHObO salaried appointments. You cannot change compensation for a regular AUPE and MaPS appointments when extending a job. |

Complete the following steps:

Log into the My U of C portal

1. First, sign into the My U of C portal and follow the menu path: Enterprise Systems → Human Resources → Human Resources PeopleSoft.

Initiate a New Transaction

2. Click the Manager Self Service link.
   From the Job and Personal Information section, click the Job Change Requests link.

   • Click the Initiate New Transaction button.
Complete the following steps:

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| **3.** | **Search for the Applicable Employee Job Record**  
- Enter a valid eight digit employee ID number into the Empl ID field.  
- Click the **Look up Empl Record** button.  
- Select the job record you wish to view and click its link.  
- Click the **Add** button. |

**Important!** Always verify you have selected the correct record before moving on to the next step.

| **4.** | **Enter Effective Date of Transaction**  
- Scroll to the **Job Change Details** section to enter the Effective Date and Transaction type.  
- Enter the **Effective Date** of the extension by entering it manually (YYYY/MM/DD format), or by clicking the calendar icon. |

**Important!** The effective date of an extension should always be the day following the current expected-end date.

| **5.** | **Select the Transaction Type**  
- Click the **Transaction type** list button.  
- Select Extension or Extension - Other from the drop down list item. |

| **6.** | **Enter new Expected End Date**  
- Enter a new Expected End Date for this appointment. |

**Note:** This transaction cannot be saved without entering a new expected end date.
Complete the following steps:

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<tbody>
<tr>
<td>7.</td>
<td>If the funding source for this appointment is changing on the same effective date of the extension you can enter this new accounting information with the extension.</td>
</tr>
</tbody>
</table>

To change the accounting:
- Scroll down to the **New Earnings Distribution** section.
- Delete all existing rows of accounting information by selecting the minus button to the right of each row.
- In the first new accounting row:
  - Enter the Business Unit that corresponds with the new accounting string. **UCALT** is the appropriate business unit for salary charged to projects. **UCALG** is the appropriate business unit for salary charged to operating accounts.
  - Enter the percentage of salary that you are distributing to the new accounting string in the **Distrib%** field. If you are charging 100% of the salary to the new ChartFields then enter 100.00. If you are charging less than 100% enter the applicable amount.
  - Click the **Edit ChartFields** link to enter the new ChartFields to where the distributed salary will be charged:
    - Enter a valid **Fund** code.
    - Enter a valid **DeptID** to where the salary for this appointment will be charged.
    - Click the **Acct** field and enter in the salary account.

- **REQUIRED** - For salary charged to research projects (UCALT):
  - Click the **Project** field and enter in a valid project.
  - Click the **Activity** field and enter a valid activity code.
  - Click **Ok**.
- **OPTIONAL** - For salary charged to operating accounts (UCALG):
  - Enter a valid **Internal** code (if applicable).
Complete the following steps:

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</table>
| 8.   | If the salary is being charged to a single accounting string ensure that the **Distrib**% is set to 100.00 and continue to the next step.  
If the salary is being charged to multiple accounting strings:   
- Click **Add a new row** by select the plus button to the right of the newest accounting row.  
- Enter the Business Unit that corresponds with the new accounting string.  
  **UCALT** is the appropriate business unit for salary charged to projects.  
  **UCALG** is the appropriate business unit for salary charged to operating accounts.  
- Enter the percentage of salary that you are distributing to the new accounting string in the **Distrib**% field. The distribution of all accounting strings must add up to 100%.  
- Click the **Edit ChartFields** link to enter the new ChartFields to where the distributed salary will be charged:  
  - Enter a valid **Fund** code.  
  - Enter a valid **DeptID** to where the salary for this appointment will be charged.  
  - Click the **Acct** field and enter in the salary account.  
- **REQUIRED** - For salary charged to research projects (**UCALT**):  
  - Click the **Project** field and enter in a valid project.  
  - Click the **Activity** field and enter a valid activity code.  
  - Click **Ok**.  
- **OPTIONAL** - For salary charged to operating accounts (**UCALG**):  
  - Enter a valid **Internal** code (if applicable).  
Repeat this step until the distribution of all accounting strings adds up to 100%.
Complete the following steps:

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<td>9.</td>
<td><strong>Note</strong> – This step applies only to jobs funded from a UCALT business unit (Fixed Term Research, Postdoc and FHOBO appointments). If benefits are funded from a ChartField separate from the salary, and if the ChartFields are changing on the effective date of the extension, they can be updated under the <strong>New Job Information</strong> section of the job change form.</td>
</tr>
</tbody>
</table>
|      | • Click the Edit ChartFields link to enter the new ChartFields to where all benefits will be charged:  
|      |   • Enter a valid **Fund** code.  
|      |   • Enter a valid **DeptID** to where the benefits for this appointment will be charged.  
|      |   • Click the **Acct** field.  
|      |   • Click the **Project** field and enter in a valid project.  
|      |   • Click the **Activity** field and enter a valid **activity** code.  
|      |   • Click **Ok**. |
| 10.  | **Note** – This step does not apply to regular MaPS and AUPE appointment types. Skip to Step 9 for those appointments). Compensation can also be up-dated using this transaction, when the change in compensation is for the same effective date. |
|      | To change compensation:  
|      |   • Scroll up to the **CompRate** field in the New Job Information section of the form end and enter the new **Comp Rate**. |
|      | *Remember to enter the **CompRate** that aligns with the Rate Code (i.e. **MONTH** = Monthly compensation rate, **SCHOLA** = Monthly compensation rate).* |
Complete the following steps:

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| 11.  | • Scroll to the bottom of the Job Change form and click the **Save** button.  

**Note:** You can continue to the next step or exit the Job Change form and return to complete the transaction at a later time. |

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| 12.  | Once you have successfully saved your Job Change Request, the **Validate Job Data** button will be activated.  

This process ensures that all job data provided is correct and that the job change will process correctly in the employee’s record.  

• Click the **Validate Job Data** button.  

**Note:** If a message displays indicating the edits are **Ok**, move on to the next step. |

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| 13.  | • Click the **Begin Approvals** button.  

**Note** - Once the transaction is approved by all required approvers and is processed by Human Resources, the initiator will receive an automatic email confirming that the transaction has been processed.  

**Important!** Once a transaction has been sent for approvals it can still be retracted, edited and resubmitted or it can be canceled.  

However, once all approvals are complete the transaction cannot be edited or canceled by the initiator. |

**End of Procedure**

**Results**

Completion of this transaction results in the following:

- Extend a job with an expected end date
- Change accounting for the same effective date as the extension
- Change compensation (excluding AUPE and MaPS appointments) for the same effective date as the extension