

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 FHOB0 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 FHOB0 salaried appointments.


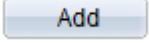
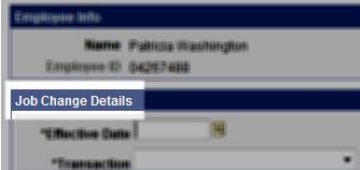
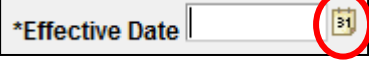

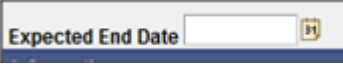
In these situations there is no need to submit separate job change transaction when the form accommodates multiple changes.

Note	<p>Step 8: This step applies only to Postdoc, Postgrad, Grad Salaried and FHOB0 salaried appointments.</p> <p>You cannot change compensation for a regular AUPE and MaPS appointments when extending a job.</p>
-------------	--

Complete the following steps:

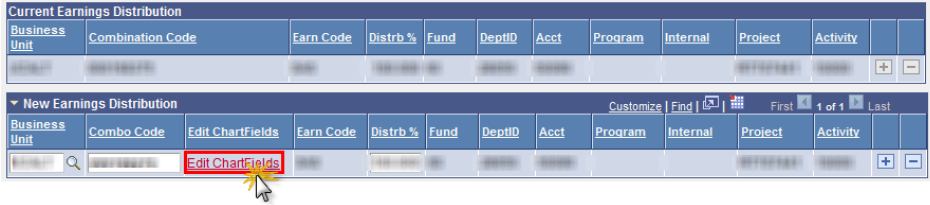
Step	Action
Log into the My U of C portal	<p>1. • First, sign into the My U of C portal and follow the menu path: Enterprise Systems → Human Resources → Human Resources PeopleSoft.</p> 
Initiate a New Transaction	<p>2. • Click the Manager Self Service link.</p> <p>▷ Manager Self Service</p> <p>From the Job and Personal Information section, click the Job Change Requests link.</p>  <p>• Click the Initiate New Transaction button.</p> 

Complete the following steps:

Step	Action
<p>Search for the Applicable Employee Job Record</p>	<p>3.</p> <ul style="list-style-type: none"> • Enter a valid eight digit employee ID number into the Empl ID field. (Alternatively, you can search by First/Last Name using the look up menu). • Click the Look up Empl Record  button. • Select the job record you wish to view and click its link. • Click the Add button.  <p>Important! Always verify you have selected the correct record before moving on to the next step.</p>
<p>Enter Effective Date of Transaction</p>	<p>4.</p> <ul style="list-style-type: none"> • Scroll to the Job Change Details section to enter the Effective Date and Transaction type.  <ul style="list-style-type: none"> • Enter in the Effective Date of the extension by entering it manually (YYYY/MM/DD format), or by clicking the calendar icon.  <p>Important! The effective date of an extension should always be the day following the current expected-end date.</p>
<p>Select the Transaction Type</p>	<p>5.</p> <ul style="list-style-type: none"> • Click the Transaction type list button.  <ul style="list-style-type: none"> • Select Extension or Extension - Other from the drop down list item.
<p>Enter new Expected End Date</p>	<p>6.</p> <ul style="list-style-type: none"> • Enter a new Expected End Date for this appointment.  <p>Note: This transaction cannot be saved without entering a new expected end date.</p>

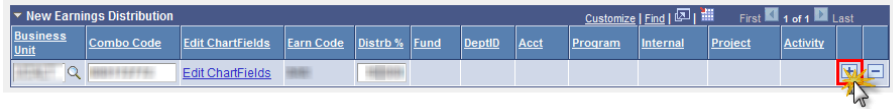
Complete the following steps:

Enter new
Earnings
Distribution
OPTIONAL

Step	Action
7.	<p>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.</p> <p>To change the accounting:</p>  <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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): <ul style="list-style-type: none"> • 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): <ul style="list-style-type: none"> • Enter a valid Internal code (if applicable).

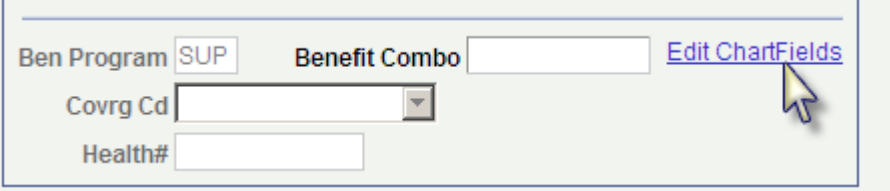
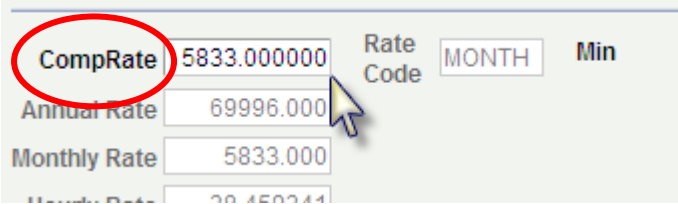
Complete the following steps:

Enter
additional
ChartFields
(accounting
strings)
OPTIONAL

Step	Action
8.	<p>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.</p> <p>If the salary is being charged to <u>multiple</u> accounting strings:</p> <ul style="list-style-type: none"> • Click Add a new row by select the plus button to the right of the newest accounting row.  <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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): <ul style="list-style-type: none"> • 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): <ul style="list-style-type: none"> ○ Enter a valid Internal code (if applicable). <p>Repeat this step until the distribution of all accounting strings adds up to 100%.</p>

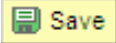
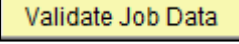

Complete the following steps:

**Edit Benefit
ChartFields**
OPTIONAL

Step	Action
9.	<p>Note – This step applies only to jobs funded from a UCALT business unit (Fixed Term Research, Postdoc and FHOB appointments).</p> <p>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 New Job Information section of the job change form.</p>  <ul style="list-style-type: none"> • Click the Edit ChartFields link to enter the new ChartFields to where all benefits will be charged: <ul style="list-style-type: none"> • 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.	<p>Note – This step does not apply to regular MaPS and AUPE appointment types. Skip to Step 9 for those appointments).</p> <p>Compensation can also be up-dated using this transaction, when the change in compensation is for the same effective date.</p> <p>To change compensation:</p> <ul style="list-style-type: none"> • Scroll up to the CompRate field in the New Job Information section of the form end and enter the new Comp Rate.  <p>Remember to enter the CompRate that aligns with the Rate Code (i.e. MONTH = Monthly compensation rate, SCHOLA = Monthly compensation rate).</p>

**Update
Compensation**
OPTIONAL

Complete the following steps:

	Step	Action
Save Job Change	11.	<ul style="list-style-type: none"> Scroll to the bottom of the Job Change form and click the Save button.  <p>Note: You can continue to the next step or exit the Job Change form and return to complete the transaction at a later time.</p>
Validate Job Data	12.	<p>Once you have successfully saved your Job Change Request, the Validate Job Data button will be activated.</p> <p>This process ensures that all job data provided is correct and that the job change will process correctly in the employee's record.</p> <ul style="list-style-type: none"> Click the Validate Job Data button.  <p>Note: If a message displays indicating the edits are Ok, move on to the next step.</p>
Begin Approvals	13.	<ul style="list-style-type: none"> Click the Begin Approvals button.  <p>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.</p> <p>Important! Once a transaction has been sent for approvals it can still be retracted, edited and resubmitted or it can be canceled.</p> <p>However, once all approvals are complete the transaction cannot be edited or canceled by the initiator.</p>
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