



Other University Appointments Course Material

Prior to attending this class, it is recommended that you read and familiarize yourself with the procedure documentation listed below.

Participants are also responsible for printing the procedure documentation, as the Facilitator will only provide the data sheet in class.

AGENDA

HRIS Basic Navigation Demo 

Introduction

- PPT: Explanation of different types of Other University Appointments
- [Academic Rank / Pay Scale Level Table](#)

HIRING

- [Hire a Non-Appointed Other Casual Academic Status Only Employee](#)
- [Hire an Adjunct Employee](#)

MAINTAINING

- [Create a Status Only Appointment](#)
- [Change Other University Appointment](#)
- [Delimit Other University Appointment](#)
- [Create Non-Budgetary Cross-Appointment](#)
- [Create Emeritus / Emerita for a Staff Member](#)
- [Add a Status Only Appointment for Employees Without Existing Status Only Appointments](#)
- [Deactivate a Casual Employee \(i.e. Status Only employee\)](#)

ACTIONS

- [Re-Hire a Withdrawn Employee with Other University Appointments into a Paid Appointed Position](#)
- [Terminate an Employee with an Other University Appointment](#)



HRIS: Other University Appointments (OUA)



Contents

- Introduction & Agenda for OUA Course
- Definitions & Types of Various OUA
- Looking at End Dates
- IT 9031 – Other University Appointment
- Other University Report
- Office of the Vice-President & Provost Webpage & HRIS Documentation
- Questions



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Introduction & Agenda

- OUA is a combination of demo, hands-on exercises and lecture – Please take plenty of notes and ask questions

What are we covering today?

1. Overview of the Terms and Definitions of Other University Appointments
2. Hiring two types of Other University Appointment employees
3. Create/Change/End Status Only Appointment
4. Cross-Appointment – Non-Budgetary
5. Create Emeritus/Emerita Appointment
6. Add a New Status Only Appointment
7. Deactivate
8. Rehire
9. Terminate



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Definitions and Types of OUA



Subtypes for infotype "Other University Appointment" (

Restrictions



STyp	Name
ADJ	Adjunct Appointment
ADM	Other Administration Academic
CCA	Clinical Cross Appointment
CLN	Clinical (MD) Appt
EMR	Emeritus/Emerita
HOS	Hospital Affiliation
NON	Non-Budgetary Cross-Appt
PRI	Primary Academic Affiliation
STA	Status Only Appointment
VIS	Visiting Professor Appt.



Introduction

- Status-only or Adjunct appointments are held by individuals who are employed outside of the University of Toronto.
- These are non-salaried and non-continuing academic appointments which may be given to individuals whose skills and expertise can advance the academic mission of the University.
- However, it is essential to ensure that such appointments are made in a manner that is consistent with the mission of the University, preserves the integrity of our standards, and provides appropriate protection for the individual and the University.



Introduction

- Appointed faculty and librarians, (i.e those appointed under the [Policy and Procedures on Academic Appointments](#), the [Policy and Procedures on Employment Conditions of Part-time Academic Staff](#), the [Policies for Librarians](#) and the [Policy on Part-time Librarians](#)) as well as clinical faculty (i.e. those appointed under the [Policy on Clinical Faculty](#)) and University of Toronto staff members are **NOT** eligible to hold Status-only or Adjunct appointments at the University of Toronto as defined by these guidelines.
- Librarians or staff members (including Research Associates) involved in graduate teaching or supervision can hold membership in the School of Graduate Studies to enable this to occur but must **NOT** be given a Status-only or Adjunct appointment

Status-only Appointments

- Individuals being considered for Status-only positions should normally hold full-time employment arrangements with another institution with a job description that is appropriately academic (components of research and/or teaching) in nature.
- Most often, Status-only appointments may be granted to qualified employees of affiliated hospitals, research institutions, agencies with collaborative agreements with the University of Toronto or other universities.
- Status-only appointments are non-salaried and normally receive no remuneration from the University of Toronto. Such appointments are made to allow a faculty member from another university or a qualified individual from an appropriate institution to participate more fully in an academic unit's teaching or research program.

Status-only Appointments



- Status-only appointees have certain privileges through their affiliation with the University (e.g. where appropriate, they can be recommended for a graduate appointment and are eligible to apply for research funding).
- Care must be taken that the individual's primary appointment is chiefly academic and that appropriate safeguards and infrastructure are in place to protect academic freedom and ensure proper ethical conduct.
- These appointments also have resource implications, consideration must be given to the support of Status-only appointments.



Adjunct Appointments

- Individuals who are employed elsewhere in a position that is not primarily academic in nature, who have special skills or learning of value to a unit and who may provide services for which recognition is desirable may be appointed as an Adjunct faculty member for a **limited term**.
- Those individuals who have special qualifications and expertise, such as eminent professionals of recognized stature, should be appointed as Adjunct Professors.
- This category of appointment is normally reserved for distinguished individuals of exemplary achievement with whom units expect to have an on-going connection.



Adjunct Appointments

- Other individuals who are appointed within teaching programs or who contribute their skills or experience in supervising clinical placements should be appointed as Adjunct Lecturers.
- Recognizing that the role and contribution of Adjunct Lecturers and Adjunct Professors will vary across units, each division is encouraged to create Guidelines for the appointment of Adjunct Lecturers and Adjunct Professors.
- Guidelines should be submitted to the Office of the Vice Provost, Faculty and Academic Life for approval.



Visiting Professors

- Faculty from other universities and research institutes who hold continuing appointments in their home institutions may be appointed to a unit as a Visiting Professor.
- Academic units are responsible for and should endeavor to make available to Visiting Professors appropriate office space, access to IT and library resources and a divisional e-mail address.
- In exchange, the Visiting Professor will be expected to contribute to the research and teaching activities of the academic unit.



Visiting Professors

- Visiting Professors may or may not receive honoraria and expenses.
- Visiting Professors who are to be offered annual appointments of between .25 FTE and .75 FTE must be appointed as part-time faculty members, under the [Policy and Procedures on Employment Conditions of Part-time Academic Staff](#).
- Visiting Professors who are to be offered full-time salaried appointments will be appointed under the [Policy and Procedures on Academic Appointments](#) (see the section on [Contractually Limited Term Appointments](#)).

Non-Budgetary Cross-appointments

- A non-budgetary cross-appointment is offered by a unit to an appointed faculty member from another unit at the University of Toronto. Such appointments are usually made to allow the faculty member to participate more fully in the unit's undergraduate teaching or research program (when the graduate home is not in the unit of primary appointment).
- **Please note:** Faculty may hold non-budgetary cross-appointments to other units but must not hold Status-only appointments. Status-only appointments are for qualified external faculty only (please see the [Provost's Guidelines on the Appointment of Status-only, Adjunct and Visiting Professors](#)).

Professor Emeritus/Emerita



- Effective July 1, 2009 the rank of Emeritus was extended to Professors, Associate Professors, Senior Lecturers and Librarians (III & IV) in continuing appointments that have elected to retire or are retired.
- An individual appointed to these ranks may elect to have the title Emeritus/Emerita and these are reported to the Academic Board each year.
- Faculty who have held a named chair at retirement are also eligible to request that their Emeritus title includes the name of the Chair. For example, the ‘Smith Professor’ could become the ‘Smith Professor Emeritus’. Such titles require the approval of the Provost.

Professor Emeritus/Emerita



- Faculty members who retire early and who hold one of the above ranks at retirement are also eligible for appointment as Emeritus or Emerita.
- Individuals who are re-appointed to a post-retirement position, whether full-time or part-time, are eligible to hold the rank of Emeritus/Emerita as well as the recommended rank for the teaching position if different.



PDAD&C Appointments

Appointments governed by the [Policy on the Appointment of Academic Administrators](#) will be entered into HRIS **centrally** after approval by the Agenda Committee of Academic Board, based on information provided by the Office of the Vice-President and Provost. The following academic administrators are included:

- Deans
 - Principals
 - Department Chairs
 - Directors of EDU-As and EDU-Bs
 - Associate Deans
 - Vice-Deans
 - Vice-Principals
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- Please Note: Faculty members who serve as Graduate Chairs but who are not also budgetary chairs will be entered into HRIS in the same method as faculty holding academic administrative positions that are NOT governed by the [Policy on the Appointment of Academic Administrators](#) ([details below](#)).



PDAD&C Appointments

- Faculty members in these positions will be transferred into an Academic Administrator position number (which in most cases will be the same as the current position being used) and will include details such as FTE appropriate to their position. The FTE will usually be 100%, but in some cases where an individual has more than one appointment, an appropriate split in FTE will be calculated.
- The details of their primary academic appointment will continue to be available in HRIS. Faculty members will be moved back automatically to their original academic appointment and position number at the completion of their administrative term. If any changes should occur to those members' appointments, these will also be incorporated as long as the appropriate appointment letter indicating any revisions is provided to the Office of the Vice-President and Provost.
- Once the faculty member has been transferred to the Academic Administrator position, the department will be contacted to complete the HRIS processing of the Academic Stipend payment as per usual, [using wage type 0120 – T4 Admin Stipend](#).



PDAD&C Appointments

Details of the changes to Faculty members with non-Policy Academic Administrative duties:

Moving forward effective July 1, 2014, faculty members performing other academic administrative roles such as Associate Chair, Graduate Coordinator or Program Coordinator will not be transferred to new position numbers in HRIS, but rather will remain in their current faculty positions. Details around these duties will need to be processed by Departments in HRIS by using the new 'Other Administration Academic' code in '[Other University Appointment](#)' screen (IT9031).

If a new stipend payment is associated with these types of duties, then the department must process that payment [using wage type 0140 – T4 Other Income Appointed Staff](#). If there are currently non-policy administrative stipends being paid beyond June 30, 2014 using wage type 0120 – T4 Admin Stipend, and the individual's base salary is:

- Greater than \$150,000, the administrative stipend will be switched centrally to wage type 140- T4 Other Income Appointed Staff.
- Less than \$150,000, you will receive additional information later in June regarding the treatment of the administrative stipend for the remainder of the appointment.



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Looking at End Dates

STY	NAME	END DATE
ADJ	Adjunct Appointments	Must Have an End Date
CCA	Clinical Cross Appointment	With an End Date or Can be 31.12.999
CLN	Clinical (MD) App	With an End Date or Can be 31.12.999
EMR	Emeritus/Emerita	End Date Must Be 31.12.9999
HOS	Hospital Affiliation	With an End Date or be 31.12.999
NON	Non-Budgetary Cross-Appt	Must Have an End Date
PRI	Primary Academic Affiliation	With an End Date or Can Be 31.12.9999
STA	Status Only Appointment	Must Have an End Date
VIS	Visiting Professor Appt.	Must Have an End Date



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IT9031 Screen in HRIS

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Create Other University Appointment (9031)

Personnel No.	1004104	Professor	Rachel Chow
Pers.area	Appointed	Subarea	Academic
Employment	Active	EE subgrp	Prof Non Tenure Strm
Start	<input type="text"/>	To	<input checked="" type="checkbox"/>

Other University Appointment

SubType	NON	Non-Budgetary Cross-Appt
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Appointment Details

Appointment Type	N
Organizational Unit	<input checked="" type="checkbox"/>
Academic Rank	30 Asst Professor



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HRIS Reports – Other University Appointments

▼ Human Resources
▶ Personnel Management
▶ Time Management
▶ Payroll
▶ Training and Event Management
▶ Organizational Management
▼ Information System
▼ Personnel Management
▼ Administration
▼ Departmental Level Administration
▼ SAP Query Reports (New)
• ZHSQRANKTEN - Rank & Status Info. Report
• ZHSQOUA - Other University Appointments Report
• ZHSQEDUSUM - Education Summary Report
• ZHSQEMAIL - Email Address Report
• ZHSQTALEOID - Taleo Candidate-ID Report

Transaction Code: ZHSQOUA



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Information and Documentation



UNIVERSITY OF
TORONTO

Office of the Vice-President & Provost

Policies and Guidelines: <http://www.provost.utoronto.ca>

Academic Administrative Procedures Manual:

<http://aapm.utoronto.ca/academic-administrative-procedures-manual>

HRIS System Training and Support Centre

Found on Office 365 - SharePoint

Questions

