Approving TAE Appointments – Additional Employment

Overview

This job aid shows approvers how to approve Temporary Academic Employment (TAE) appointments:

- Navigating to your Approval Queue
- Approval queue overview
- **Level 2 Approval Queue – "Appointment Authority"**
  - Level 2 - Review Appointment Data
  - Level 2 - Approve an appointment
  - Level 2 - Pushback an appointment
  - Level 2 - Approver and Workflow guidelines
- **Level 4 Approval Queue – "Ready to Pay"**
  - Level 4 - Review Appointment Data
  - Level 4 - Release Payment
  - Level 4 - Pushback an appointment
  - Level 4 - Approver and Workflow guidelines
- Additional Employment (AE) Appointment – TAE Submission workflow

Background

When an Originator submits a temporary academic appointment, the appointment must be approved before payment can be issued.

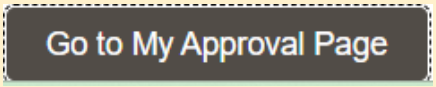
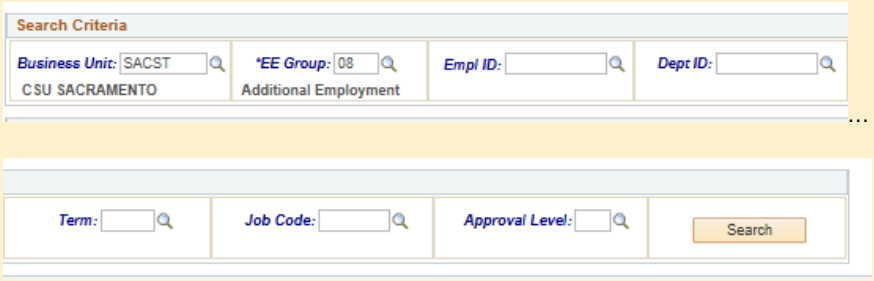
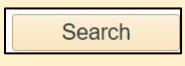
Approvers review the information, and depending on their approval level, approvers may update the information or push back the appointment to a prior step for revisions.

Before you begin

You should be familiar with the following:

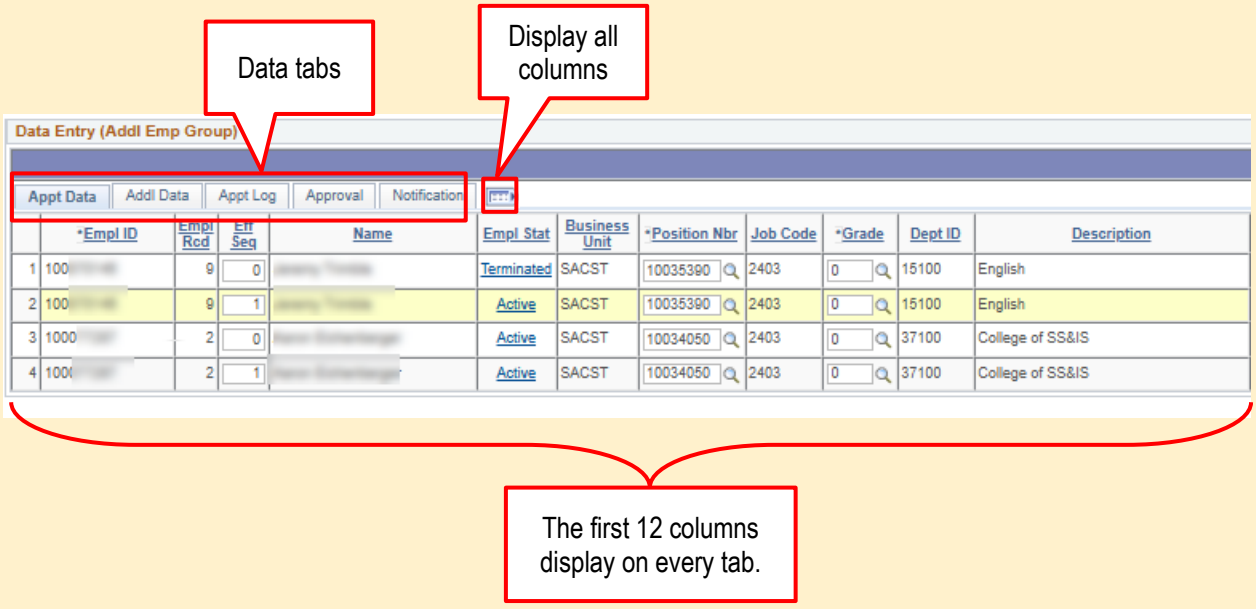
- CFA CBA - Article 36 – Additional Employment
- CFA CBA – Article 20 – Workload
- Office of Faculty Affairs – Additional Employment Website

Navigating to your Approval Queue

Action	Information
1. Navigate to CSU TAE Appointment Data Entry	Menu > CSU Temp Academic Employment > CSU TAE Approval Workflow > CSU TAE My Approval page Alternately, on the Approval Chart tile from the Employee Self-Service Homepage you may press "Go to My Approval Page" to navigate to the approval queue. Note that you can-not access appointment data in the Approval Chart tile directly. 
2. Enter search criteria to find approvals - Business Unit (campus) - EE Group: **08 Additional Employment**	 • Verify that the Business Unit is correct: Required • EE group **08**: Required • Empl ID: Optional • Dept ID: Optional • Term: Optional • Job Code: Optional • Approval Level.: Suggested for approvers with multiple approval roles.
Action 2 Notes: A search will return appointments that you should be authorized to approve. Empl ID, Dept ID, Term & Job Code are not required fields. It is recommended to run your search without using these fields unless a large amount of items are in your approval queue and you wish to narrow down the search results. For approvers with multiple approval roles (Level 2 – Appointment Authority, Level 4 – Ready to Pay) it is recommended that you use the approval level field to ensure your following the appropriate steps for that approval level.	
3. Click **Search**.	

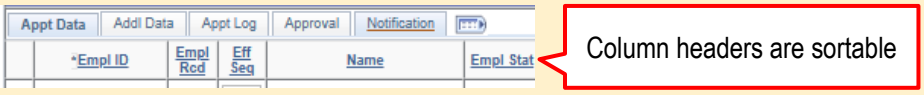
Approval Queue Overview

Information



Notes: If there are no appointments to approve under the search parameters used your queue will be empty. If there are appointments you were expecting to see but do not, try adjusting your search filters (see Searching for Appointment Candidates section above). Appointment ending approval will be returned in rows of data. The first 12 columns for all CSU TAE approval queue data tabs will be the same: Row, Empl ID, Empl Rcd, Eff Seq, Name, Empl Stat, Business Unit, Position Nbr, Job Code, Grade, Dept ID, and Description.

In the approval queue there will be 5 tabs of data, Appt Data, Addl Data, Appt Log, Approval, and Notification.

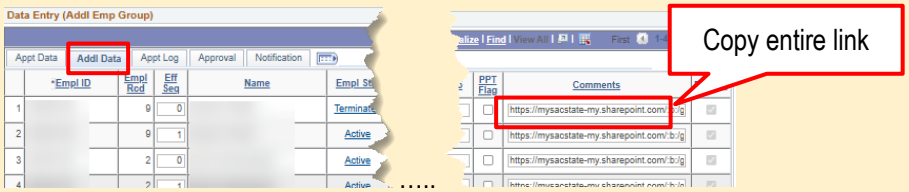
Action	Information
1. Organize the data.	

Action 1 Notes:

You can organize the appointments in your approval queue by sorting any of the column headers. Like in Excel you can sort multiple headers to get the data organized in the way that you want it by organizing it in reverse. For example, if you want the data organized by Dept ID > Name > Appt Type you would first sort by Appt Type followed by Name and finally by Dept ID.

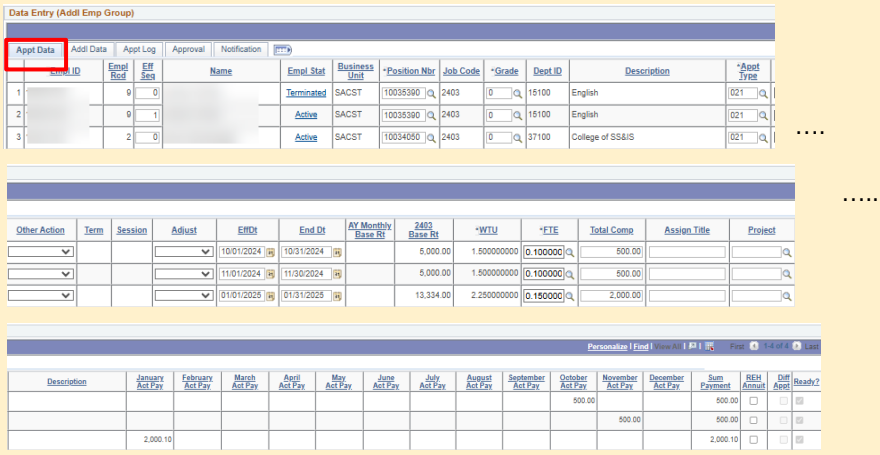
Review Appointment Data – Level 2 "Appointment Authority"

Level or Step 2 approvers must be an MPP, preferably the person directly responsible for the department where the work is being completed. At step 2 in the approval workflow an approver has the authority to approve the appointment and the allocation of budget associated with the appointment payment.

Action	Information
1. On the approval queue screen open to the "**Addl Data"** tab and open the supporting document link on a separate browser tab or window.	

Action 1 Notes:

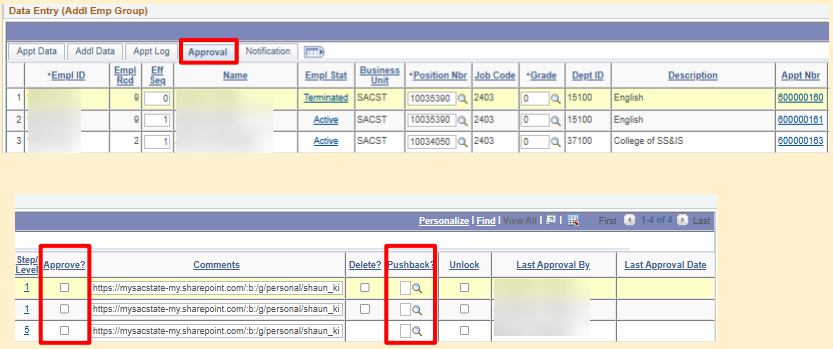
The supporting documents should be stored on OneDrive and shared via a link in the comments section. The link should be set so that anyone with the link can access the document. When copying the link be sure to copy the entire link. Open the link in a separate tab or window. If the link is missing, incomplete, or broken pushback the appointment to the originator (Level 0) and request an updated link.

2. Review the additional employment appointment data on the "**Appt Data**" tab.	

Action 2 Notes:

Compare the information on the supporting documentation to the data on the Appt Data tab. Review the:

- ***Effective dates***: Do the effective dates align with when work will be done?
- ***Workload***: Does the workload (FTE or WTU) seem accurate and or appropriate for the work being done?
- ***Compensation***: Is the amount close to the total amount on the supporting document? Due of the way TAE calculates compensation the total gross payment amount may be a few cents or dollars more than the rate on the supporting document.
- ***Position Number***: Is the position number and Dept ID correct? Does it match the fund source that the payment should post to? Cognos has a Position Management report that provides position numbers and their associated fund sources based on Dept ID.

Action	Information
3. Make a determination regarding the appointment. (“Approve” or “Pushback”) via the “**Approval**” tab.	 …..

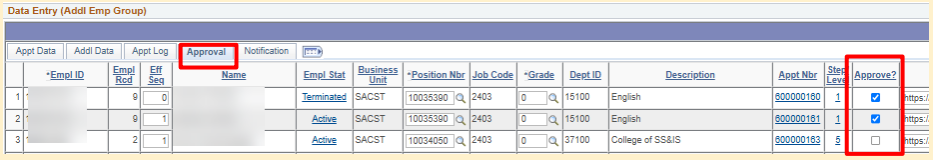
Action 3 Notes:

A Level-2 Approver can “Approve” the appointment, which would approve the work and the allocated budget/fund source.

Or a Level-2 Approver can “Pushback” the appointment for revisions. For cancellations contact OFA directly.

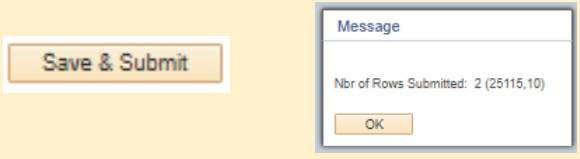
Approve an Appointment – Level 2 “Appointment Authority”

Level 2 approvers must be an MPP, preferably the person directly responsible for the department where the work is being completed.

Action	Information
1. On the “**Approval**” tab check the “Approve?” box.	

Action 1 Notes:

Approve the appointment only after careful review. An approver can select and approve multiple appointments simultaneously.

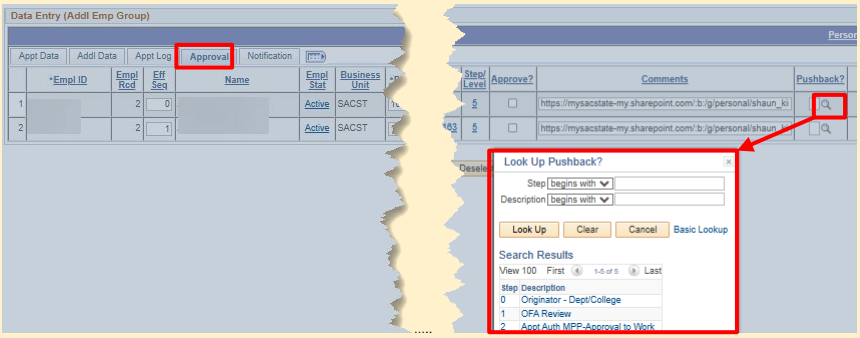
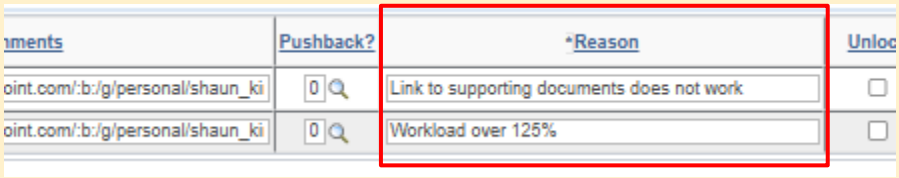
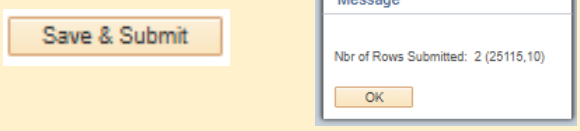
2. Click “**Save & Submit**”	

Action 2 Notes:

After clicking “Save & Submit” a pop-up confirming the number of submitted rows will appear and the appointments will move forward in the workflow approval process.

Pushback an Appointment – Level 2 "Appointment Authority"

Level 2 approvers must be an MPP, preferably the person directly responsible for the department where the work is being completed.

Action	Information
1. On the "**Approval**" tab click the magnifying glass next to the "**Pushback**" checkbox and select which level to return the appointment for revisions.	
Action 1 Notes: Returning the appointment to Level or "Step" 0 returns the appointment to the Originator, who submitted the appointment in TAE and who provided the link to the supporting documents. This is the level a Level-2 Approver would likely return or "Pushback" an appointment for revisions. Returning the appointment to Level or "Step" 1 returns the appointment to the Office of Faculty Advancement. Do not "Cancel" an appointment in TAE. Contact OFA directly for cancelations.	
2. Add a reason to the "***Reason**" field for each appointment you "Pushback".	
Action 2 Notes: The "*Reasons" field will only appear on rows that a "Pushback" level/step has been chosen. A reason is required in order to pushback an appointment. Be clear about why the appointment is being returned. An approver can select and "Pushback" multiple appointments simultaneously.	
3. Click "**Save & Submit**"	
Action 3 Notes: After clicking "Save & Submit" a pop-up confirming the number of submitted rows will appear and the appointments will move backward in the workflow approval process.	

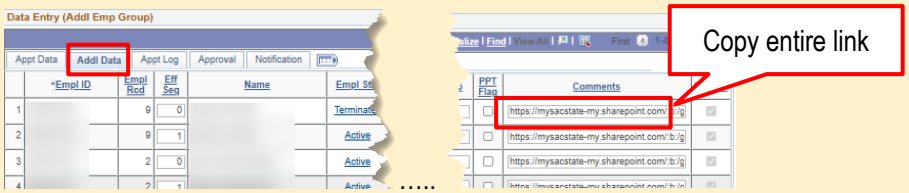
Additional Employment Appointment – Level 2 - Approver and Workflow guidelines

Use these guidelines when approving Additional Employment data within 08 EE group.

Level 2 Approver wishes to…	Do this…	Result
Approve Appointment If all three apply • Work meets CBA Guidelines for an Additional Employment appointment • Faculty has the available workload to take on the work. • Budget allows for payment	• Appointment Authority (MPP) reviews appointment • Appointment Authority (MPP) – Level 2 Approver - approves work and budget allocation by **Approving** appointment in TAE.	• Appointment moves forward in Workflow and is reviewed by OFA. • Faculty will not receive a notification or be cleared for work until OFA review is complete.
Pushback Appointment If any apply • Work does not meet CBA Guidelines for an Additional Employment appointment • Faculty does not have the available workload to take on the work. • Budget does not allow for payment • Revisions are required	• Appointment Authority (MPP) reviews appointment • Appointment Authority (MPP) – should **Pushback** the appointment to Level – 0 for revisions or contact **OFA** to Cancel the appointment.	• Appointment moves backward in Workflow for revisions or cancelation.
• Cancel an existing appointment after it is loaded to Job Data	• Contact **OFA** if you need to cancel an appointment.	• If cancellation approved, Cancelation notification may be generated. • Job is canceled in Job Data.

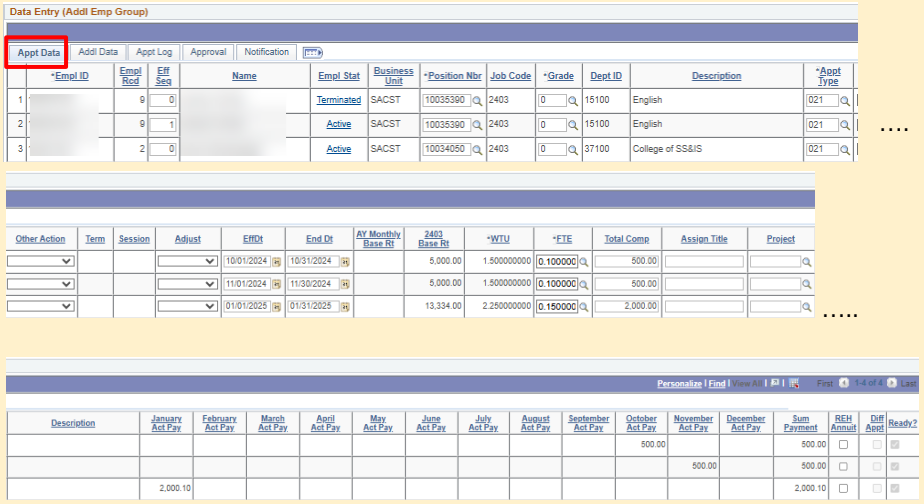
Review Approval Queue – Level 4 “Ready to Pay”

Level or Step - 4 is the “Ready to Pay” step in the approval queue. Step 4 verifies that work is complete or confirms it is okay to release payment in advance for monthly payments or for 16th Unit payments. College or Program Analysts, Department Chairs or Program Coordinators are typical verifiers at this level.

Action	Information
1. On the approval queue screen open to the “**Addl Data”** tab and open the supporting document link in a separate browser tab or window.	

Action 1 Notes:

The supporting documents should be stored on OneDrive and shared via a link in the comments section. The link should be set so that anyone with the link can access the document. When copying the link be sure to copy the entire link into a new browser tab or window.

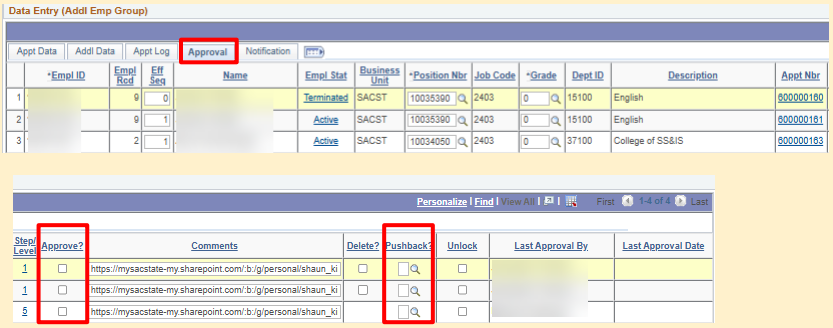
2. Review the additional employment appointment data on the “**Appt Data**” tab and the supporting documentation.	

Action 2 Notes:

Review the information on the supporting documentation and the Appt Data tab.

Review the:

- ***Effective dates***: Has there been a change to the effective dates?
- ***Workload***: Is the workload (FTE or WTU) still appropriate for the work that was done?
- ***Compensation***: Was there a change to the compensation? Due of the way TAE calculates compensation the total gross payment amount may be a few cents or dollars more than the rate on the supporting document.
- ***Position Number***: Has the fund source changed?

Action	Information
3. Make a determination regarding the appointment. ("Approve" or "Pushback") via the "**Approval**" tab.	

Action 3 Notes:

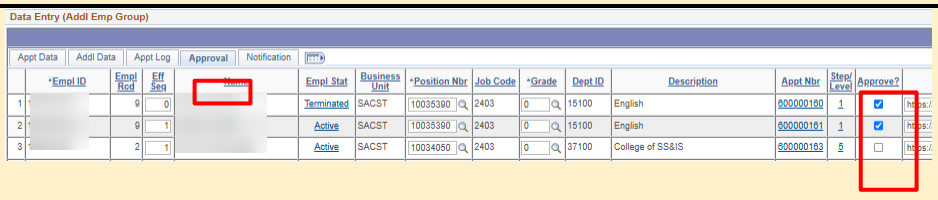
If there have been no changes to the intended compensation amount or fund source **and** the work is either complete *or* a monthly payment or 16th unit approval has been confirmed the Level-4 Approver can release payment by "Approving" the appointment at this level.

If there **have** been changes to the compensation or fund source a Level-4 Approver should "Pushback" the appointment.

For cancellations contact OFA directly.

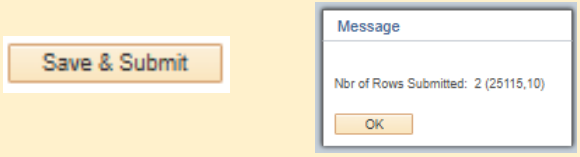
Release Payment – Level 4 "Ready to Pay"

If there have been no changes to the intended compensation amount or fund source and the work is either complete or a monthly payment or 16th unit approval has been confirmed the Level-4 Approver can release payment by "Approving" the appointment at this level.

Action	Information
1. On the "**Approval**" tab check the "Approve?" box.	

Action 1 Notes:

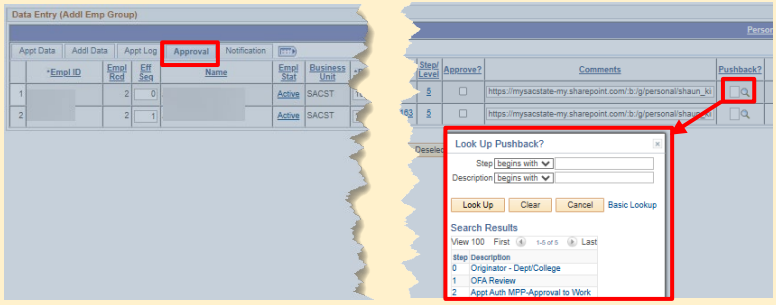
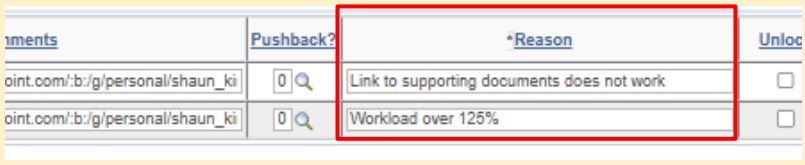
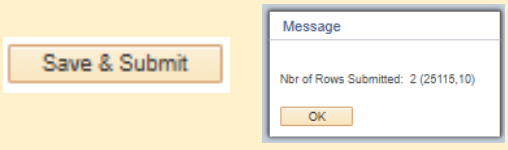
"Approve" the appointment only after careful review. If a payment requires a deliverable do not approve the appointment as "Ready to Pay" until an acceptable deliverable is received. If the payment is a monthly payment that should be paid as the work is being done or if the payment is for a 16th unit the appointment can be "approved" in advance.

2. Click "**Save & Submit**"	

Pushback an Appointment – Level 4 “Ready to Pay”

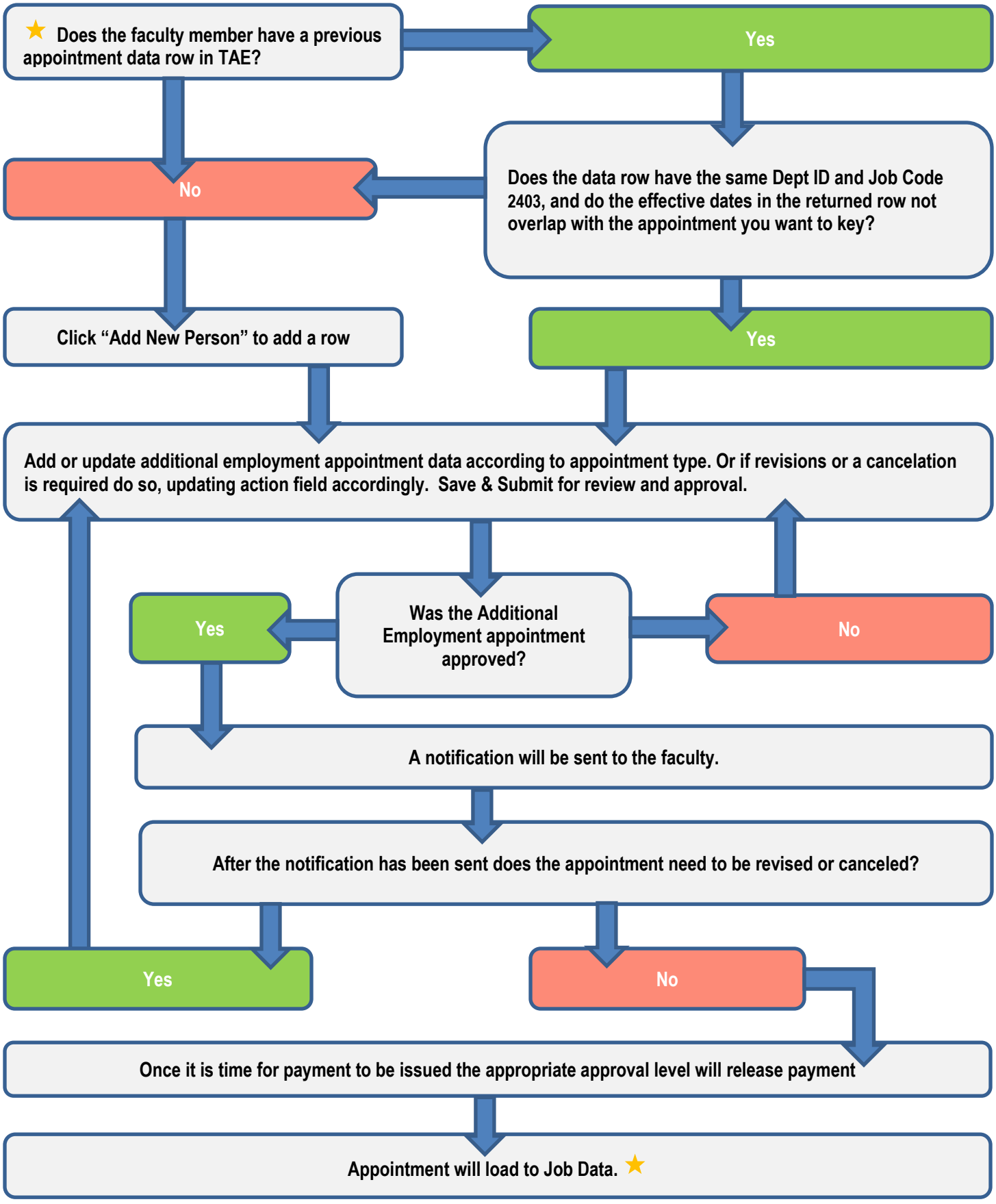
If there have been changes to the compensation or fund source a Level-4 Approver should “Pushback” the appointment to the either Level-0 the Originator (Submitter) or to Level-2 the Approver (Appointment Authority) so that the appointment can be revised (Level-0) or re-approved (Level-2).

For cancellations contact OFA directly.

Action	Information
1. On the “**Approval**” tab click the magnifying glass next to the “**Pushback**” checkbox and select which level to return the appointment for revisions.	
Action 1 Notes: Return the appointment to Level or “Step” 0, the Originator, if the Originator will be making revisions to the appointment in TAE, such as changes to compensation or position number (fund source). Return the appointment to Level or “Step” 2, the Appointment Authority (MPP), if the Appointment Authority needs to re-approve changes you have made to the appointment in TAE (like changes to compensation or position number). Do not “Cancel” and appointment in TAE. Contact OFA directly for cancelations.	
3. Add a reason to the “***Reason**” field for each appointment you “Pushback”.	
Action 2 Notes: The “*Reasons” field will only appear on rows that a “Pushback” level/step has been chosen. A reason is required in order to push back an appointment. Be clear about why the appointment is being returned. An approver can select and “Pushback” multiple appointments simultaneously.	
4. Click “**Save & Submit**”	
Action 3 Notes: After clicking “Save & Submit” a pop-up confirming the number of submitted rows will appear and the appointments will move backward in the workflow approval process.	

Additional Employment Appointment – Level 4 - Approver and Workflow guidelines

Use these guidelines when approving release of payment for Additional Employment in 08 EE group.

Level 4 Approver wishes to…	Do this…	Result
Approve Release of Payment If any apply • Faculty have completed the work (Lump-Sum payments) • Work was approved for monthly payment (Lump-Sum payments) • Work was approved as 16th unit.	• "Ready to Pay" approver– Level 4 Approver - approves release of payment by **Approving** appointment in TAE.	• Appointment moves forward in Workflow and is reviewed by OFA. • If approved payment will be pushed to Job Data. .
Revise an appointment. If any apply • Compensation Amount has changed • Change end date of appointment • Update faculty workload for project	• **Edit** the Appointment in TAE • **Pushback** the appointment to Level – 2 "Approval Authority" to review changes.	• Appointment moves backward in approval Workflow • If revisions approved, a new appointment notification is generated. • Revised appointment pushed to Job Data
Pushback Appointment for Revisions If any apply • Compensation Amount has changed • Fund source has changed • Update faculty workload for project	• Level 4 Approver - **Pushback** the appointment to Level – 0, the Originator, for the Originator to make revisions. • Contact **OFA** to Cancel the appointment.	• Appointment moves backward in Workflow for revisions or cancelation.
• Cancel an existing appointment after it is loaded to Job Data	• Contact **OFA** if you need to cancel an appointment.	• If faculty have received a notification, they will get an updated notification letter. • Appointment is canceled.

Additional Employment (AE) Appointment – TAE Submission workflow