

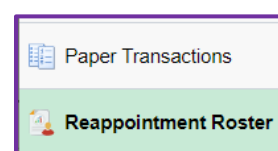
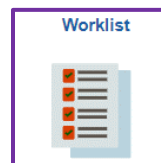
Submitted Rosters

Once an Initiator submits a roster for review and approval, it appears in the department's worklist. Approvers will be aware that a roster is ready for review by either checking their worklist or receiving a separate communication from the Initiator. Emails do not automatically generate upon submission, and it is a best practice to check your worklist frequently. **Important**, if you submitted the roster as an Initiator, it will not be available for you to approve and will not appear in your Worklist. Another approver for the department must review and approve the roster.

Access the Roster

Rosters are accessed via the Worklist.

1. Navigate to my.columbia.edu
2. Select the **HR Manager** tab on top of the page.
3. Scroll down and select the **People at Columbia (PAC)** icon and log in with your UNI and Password.
4. Select the **Manager Self Service** tile.
5. Select the **Worklist** tile.
6. Select **Reappointment Roster** from the left menu.

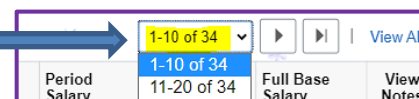


Review and Update the Roster

1. Click the **link** for the roster you want to review and approve. Each roster displays the level of approval pending along with the date initiated and by whom.

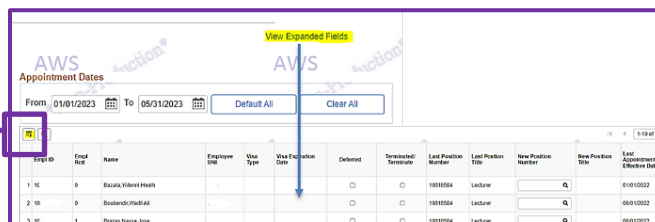
Department	Department Name	Type of Trans	Effective Date	Name	Recycled?	From	Date From	Date Initiated	Link	FT/PT	Job Code	Work Item
402910X	A&S Philosophy	Reappointment Roster - Faculty			☐	Juudwqawq,Bjbi Vdmsvz	03/21/2023	03/21/2023	CU Reappointment Roster 544, Reappointment Roster Approval - 1901-02-01, N, 0, CU OFFRSTR ID 20232 DEPTID 402910X, CU OFFRSTR CLS FCT RDC RA 0 A			Level 1 Approver

2. Review, and update if needed, each person's reappointment information on the roster. The default view displays two rows display for each employee. The top row includes the employee's existing information, and the row beneath is where new data is entered. Thus, the number of rows displaying, e.g., 34, are double the number of employees, 17. If more pages of employees appear, use the navigation arrows to view the data.



Note that if you select **View Expanded Fields**, the person's information displays on one row.

Use the **Export** icon to download the data to Excel.



Emp ID	Emp Name	Employee ID	Job Title	Max Position Title	Ordered	Terminated/Resigned	Last Position Number	Last Position Title	New Position Number	New Position Title	Last Appointment Effective Date
1 16	Razula Vahedi Health				☐	☐	10000004	Lecturer			01/01/2022
2 16	Boudier, Chad A				☐	☐	10000004	Lecturer			06/01/2022
3 16	Brown, Nicole Jane				☐	☐	10000004	Lecturer			06/01/2022

If you are the 1st level approver for the department, you can update the roster as needed, or you can recycle it back to the Initiator. If you are a 2nd or 3rd level approver, you can only enter notes and comments. If edits are needed, recycle the roster and it will go back to the 1st level approver for updating. Confirm and edit, if needed, the following data.

- **Deferred.** If the reappointment information is unknown at the time of submitting the roster, the 'Deferred' box is checked and the entry row is 'greyed out' and the person is not included in the roster. If you would like to submit the person on the roster, uncheck the box and the entry row fields open for entry.
- **Terminated/Terminate.**
 - **Terminated.** If the person is already terminated, the 'Terminated/Terminate' box is pre-checked and the entry row is 'greyed out'.
 - **Terminating.** If the person is currently active but the school/department decided not to reappoint, the 'Terminated/Terminate' box should be checked. The entry row will 'grey out' and not be included.
Note: if the person should be terminated prior to the appointment end date listed, follow the business process to submit the termination.

- **Position Number.** Confirm that the position number is correct. If the position number is changing, confirm the correct number was selected.

Deferred	Terminated/ Terminate	Position Number	Position Title
		14000373	Reader
☐	☐	14000373	Reader

- **Appointment Effective Date and Appointment End Date.** Confirm the effective date and end date of the reappointment. Note that the dates do not have to coincide with the start of the term. They can be any date within the term listed, as applicable. Example below.

Visa Expiration Date	Deferred	Terminated/ Terminate	Position Number	Position Title	Appointment Effective Date	Appointment End Date
05/06/2024			10003470	Associate	02/02/2022	05/31/2022
	☐	☐			02/02/2023	05/31/2023
05/06/2024			10003470	Associate	01/01/2022	05/31/2022
	☐	☐			01/01/2023	05/31/2023
05/12/2023			10003470	Associate	01/18/2022	05/31/2022
	☐	☐			01/18/2023	05/12/2023

- **Salary Information.** Confirm the salary information. A value must be entered into *each* of the three compensation fields, **Period Salary**, **Annual Rate**, and **Full Base Salary** whether there is an increase, a decrease, or no change.

Position Title	Appointment Effective Date	Appointment End Date	Period Salary	Annual Rate	Full Base Salary	Complete
Adjunct Professor	01/01/2023	05/31/2023	2,300.00	9,337.50	9,337.50	Art Director
			2,300.00	9,337.50	9,337.50	

- If the person is on a \$0 salary appointment, the reappointment salary can remain at \$0, or a new salary amount can be entered. If moving to a salaried role, ensure that the I-9 is on file.

I-9 Form Confirmation (22100,1321)

You have employee(s) in this roster that are moving from a \$0 salary to a salaried role. By clicking 'OK' you are attesting that all of these individuals have a currently active I-9 form on file.

OK

Cancel

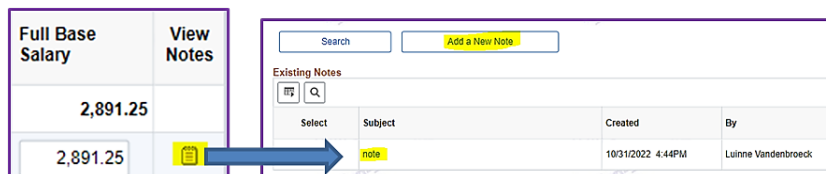
- For *faculty* who previously received a salary, the roster *cannot* be used to reappoint with \$0 salary.
- For *student officers* who previously received a salary, the roster *can* be used to reappoint with \$0 salary.
- **Complete University Title (Faculty only).**
 - Confirm that the title is correct. The system will auto populate the title that is already in PAC.
 - If the title is incorrect or is being changed, the title needs to be updated and entered in the field.

(Screen print below for example of field only)

Position Title	Appointment Effective Date	Appointment End Date	Period Salary	Annual Rate	Full Base Salary	Complete University Title
Adjunct Professor	01/01/2023	05/31/2023	2,843.75	4,360.00	4,360.00	Adjunct Assistant Professor of History
			0.00	0.00	0.00	

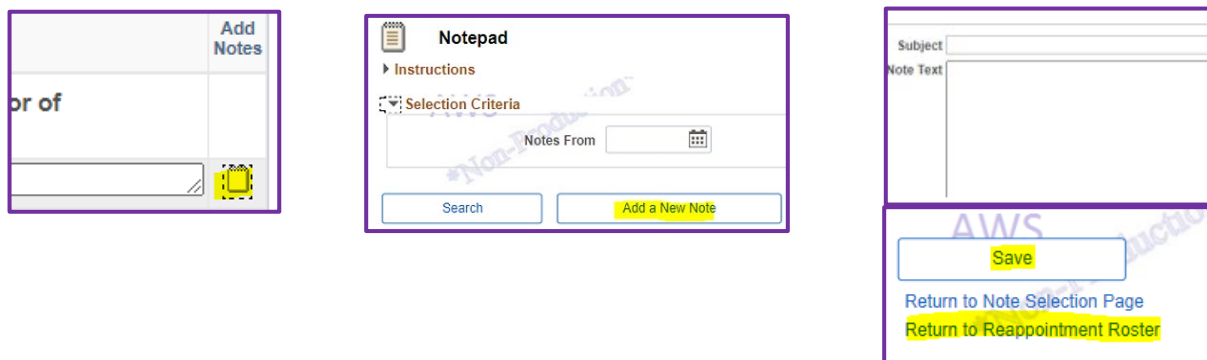
Review any **Notes** and **Comments** added to the roster. You can also enter notes as needed for the next approver or if recycling it back for rework.

- **Notes.** At the end of the row for each person, there is a notepad icon. If a note was added, lines appear within the icon. Click the notepad and then the subject to view the note.



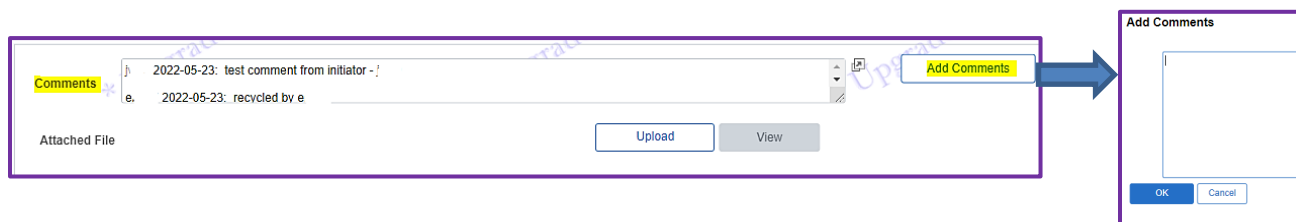
The screenshot shows a roster row with a 'Full Base Salary' of 2,891.25. To the right of the salary is a 'View Notes' button. An arrow points from a notepad icon at the end of the row to a 'Notes' modal window. The modal window has a search bar, an 'Add a New Note' button, and a table of existing notes. The table has columns for 'Select', 'Subject', 'Created', and 'By'. One note is listed with the subject 'note', created on 10/31/2022 at 4:44PM, by Luinne Vandenbroeck.

- To add to the existing notes, click **Add a New Note**, enter the text, and then press **Save**.
- To add a note, where one does not exist (no lines appear), click on the **Add Notes** notepad icon at the end of the person's row, and then select **Add a New Note**. Enter the text and then press **Save**.



The first screenshot shows a roster row with an 'Add Notes' button. The second screenshot shows the 'Notepad' form with a 'Subject' field, a 'Note Text' area, and a 'Notes From' dropdown. The third screenshot shows the 'Save' button and two links: 'Return to Note Selection Page' and 'Return to Reappointment Roster'.

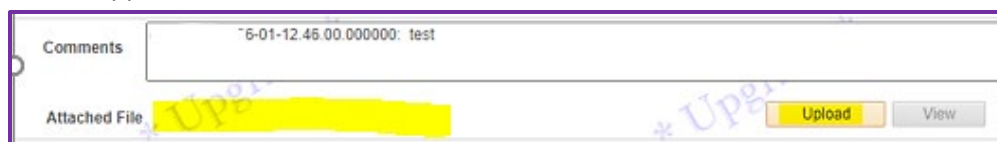
- **Comments.** If comments were added to the overall roster, they appear in the *Comments* box on the top of the page. To add another comment, if needed, click **Add Comments**, enter the text, click **OK** and the comment appears in the box with its date and time. To add additional comments, click **Add Comments** again and enter.



The screenshot shows a 'Comments' box on the roster page with two comments: '2022-05-23: test comment from initiator - !' and '2022-05-23: recycled by e'. Below the comments is an 'Attached File' field with 'Upload' and 'View' buttons. An arrow points from the 'Add Comments' button to a modal window titled 'Add Comments' with a text area and 'OK' and 'Cancel' buttons.

Review/Upload Documentation

If supporting documentation was attached to the roster, the file name appears next to the *Attached File* field on the top of the page. 1st level approvers can also attach documentation, as needed. *Only one file* can be uploaded to a roster. The expectation is that the file includes documentation for each person in the order they appear on the roster. You can change the file if needed. To do so, click the **Upload** button, search for the file where it is located, select it, and click **upload** again. The file name will appear next to *Attached File*. To view the file, click **View**.

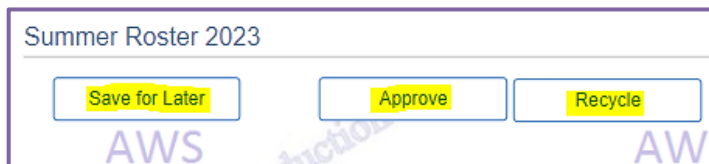


The screenshot shows a 'Comments' box with a comment: '6-01-12.45.00.000000: test'. Below the comments is an 'Attached File' field with a yellowed-out file name and 'Upload' and 'View' buttons.

Approve the Roster (or Recycle if Needed) and Monitor the Status

When you complete your review, click **Approve**.

Note that you can **Save for Later** as you are working on this until it is completed, and you are ready to approve it.



Summer Roster 2023

Save for Later Approve Recycle

If you are sending the file back for rework, click **Recycle**. Be sure to add Notes and Comments as to why it is being recycled and what needs to be updated. Emails are not automatically generated and you will need to contact your initiator (or level 1 approver) separately via phone or email to indicate that you have recycled the transaction.

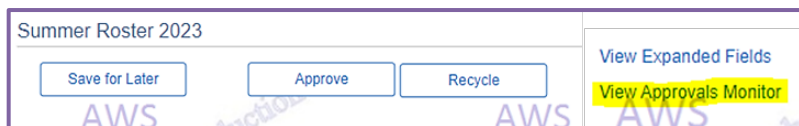
Once the roster is approved, the status changes on the home page. The status will change at each step in the process. If the Department Status = confirmed, that means that the roster is now uploaded into the system.

My Activities		Personalize Find View 100 [Icons]			First 1-20 of 101 Last
Department	Description	Category	Department Status	Workflow Status	
1 4010103	A&S Anthropology Students	Student Officers	Confirmed	Approved	

8 401310X	A&S Political Science	Faculty	Open	Not Submitted	
9 4014103	A&S Sociology Students	Student Officers	Open	Not Submitted	
10 401410X	A&S Sociology	Faculty	In Progress	In Level 3 Approval	
11 4020103	A&S Art History Students	Student Officers	Open	Not Submitted	
12 402010X	A&S Art History & Archaeology	Faculty	Open	Not Submitted	
13 402100X	A&S East Asian Lang & Culture	Faculty	Recycled	In Level 1 Approval	

Approvals Monitor

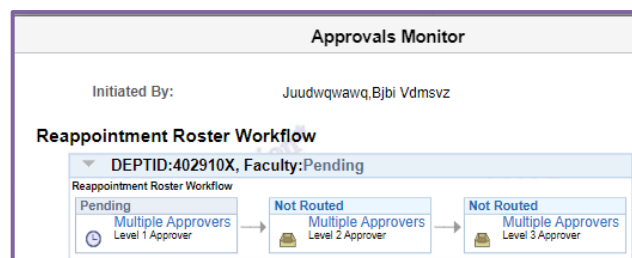
To view the available approvers for a roster and approval status, select the roster from the **Home Page** (not the Worklist) - Manager Self Service > HR Transactions > Reappointment Roster. After selecting a roster, click **View Approvals Monitor**. You can see the overall status and then click on the **Multiple Approvers** link to see the list of approvers and the approval details, once approved.



Summer Roster 2023

Save for Later Approve Recycle

View Expanded Fields
View Approvals Monitor



Reappointment Rosters and Workflow

Rosters follow the below rules and separate workflows depending upon the reappointment category.

For Faculty Reappointments

After initiation, there are 3 levels of review before the roster is uploaded into PAC.

Initiator – Level 1 – Level 2 – Level 3.

For Student Officer Reappointments

After initiation, there are 2 levels of review before the roster is uploaded into PAC.

Initiator – Level 1 – Level 2.

CUIMC: Student officer reappointments are approved at the 2nd level by the Controller's Office (Payroll) which is their final approval. They do not require a 3rd level of approval.

Morningside: Student officer reappointments are approved at the 2nd level by the school or department which is their final approval. They do not require a 3rd level (Provost) approval. GSAS approval also no longer exists for Arts and Sciences student officers.

Rules:

- The transaction stops at each level for approval. A unique person at each step must take action.
- Initiators cannot approve rosters they submitted. Another approver for the department must approve it. It is important to identify specific people for each role so that rosters can be managed appropriately.
- If you hold both the level 1 and level 2 approval roles and approve the roster at level 1, it will auto approve at level 2 and either move to level 3 for faculty reappointments approval or uploaded into PAC for student officer reappointments processing.