



North Dakota University System

Tenure Data Manual

**PeopleSoft
Version 9.1**

DISCLAIMER

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Table of Contents

Tenure Data.....	2
Prior Experience/Credits	4
Service History	6
Tenure Calc Process Instructions.....	7

TENURE DATA

To enter Tenure Data for all ranked faculty (Professor, Associate Professor, Assistant Professor and Instructor) and start the tenure clock ticking for a newly hired faculty member, refer to the main menu. Go to **Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data** to access the search page. Enter the employee's EmplID and click on Search open the Tenure Data page to enter the employee's data.

Tenure Data Page

The screenshot shows the Tenure Data page for employee 'Lola Test' (ID: 0122144). The page has three tabs: 'Tenure Data', 'Prior Experience/Credits', and 'Service History'. The 'Tenure Data' tab is active. The form contains several input fields:

- *Tenure Status: A dropdown menu.
- Home Rank: A text input field with a search icon.
- Track Start Date: A date input field with a calendar icon, set to 05/03/2007.
- Change Date: A date input field.
- Change Reason: A dropdown menu.
- Original Track Date: A date input field with a calendar icon.
- *Tenure Home: A text input field with a search icon.
- Grant Tenure: A dropdown menu.
- Service Calc. Group: A dropdown menu.
- Mandatory Review Dt: A date input field with a calendar icon.
- Granted Date: A date input field with a calendar icon.
- Override Calculation
- Committed FTE: A text input field.
- Notes: A link.
- SetID: A text input field with a search icon, containing 'NDSU1'.

 Below the form is a 'Probation (Number of Years)' section with fields for Total Required (0.000000), Time Accrued (0.000000), Current As Of Date, Extended By (0.000000), Time To Accrue (0.000000), and a Terminal Year checkbox. At the bottom is an 'Other Tenure Departments List' table with columns: Department, Description, Grant, Rank, Rank Description, Tenure Status, Effective Date, and FTE. The table currently shows one row with a search icon in the Department field.

Tenure Status: Select the appropriate Tenure Status (usually Non Tenure on Track for new hires) from the drop down box. Once the Tenure Status is selected the following fields will populate: Track Start Date, Home Rank, Change Date, Original Track Date, Tenure Home, Committed FTE, and Total Required years.

This screenshot shows the same Tenure Data page for 'Lola Test' (ID: 0122144) but with the form populated. The *Tenure Status dropdown is set to 'Non Tenure On Track'. The Home Rank is '001' with 'Professor' listed next to it. The Track Start Date is '08/16/2006', Change Date is '08/16/2006', and Original Track Date is '08/16/2006'. *Tenure Home is '0100' with 'ConnectND -- CS Test' listed next to it. Service Calc. Group is 'NDS9'. Committed FTE is '1.000000'. SetID is 'NDSU1'. The Probation section shows Total Required as '6.000000' and Extended By as '0.000000'. The 'Other Tenure Departments List' table is identical to the previous screenshot.

Home Rank: This value automatically populates from Position Data or Job Code Table. If you did not set up a home rank in these components, select it here,

Track Start Date: Displays the date that the employee's tenure accrual begins. The default is the hire date from the employment record. Employees with the Non Tenure On Track tenure status must have a track start date.

The track start date must correspond to the begin date of the calendar associated with the calculation group to ensure that the tenure calculation process runs correctly. For example, the employee's track start date needs to be on or after 8/16/xx for the 9 month Calc Groups and on or after 7/1/xx for the 12 month Calc Groups.

Change Date and Reason: Display the date the rank or status change is effective and the reason for the change. The default date is the track start date. If the Change Reason field does not display a default, select one of the options in the Tenure Status field.

Original Track Date: Displays the date tenure tracking begins for the employee. The default is the track start date.

Tenure Home: Displays the department granting the employee's tenure. This value is automatically populated from the employee's current job record.

Grant Tenure: Display only. The Y or N indicates whether the home department can grant tenure.

Service Calc. Group: Select the group used to calculate tenure accrual for your campus for either a 9 month or 12 month contract.

Mandatory Review Dt: Skip

Granted Date: Enter the date that tenure was granted.

Override Calculation: Skip. This box may be used during the Tenure Calc process. Select to not include this employee in the tenure calculation process. Note: Only employees with a Tenure Status of Non Tenure On Track will be included with the Tenure Calc process. There is no need to check the Override Calculation box for other types of Tenure Status.

Committed FTE: This value automatically populates from Employment Data in Job Data.

Notes: Click to enter notes regarding the employee's tenure.

SetID: Verify the correct SetID

Probation (Number of Years) Section

Total Required: Displays the total number of probationary years required before granting tenured status. The system automatically populates this value from the Academic Rank table.

Time Accrued: Displays the number of accrued probationary years. The system populates this value on the Service History page.

Current As Of Date: Displays the end date of the last processed computational period.

Extended By: Enter the number of years by which the probationary period is extended for this employee, if appropriate.

Time To Accrue: Displays the remaining probationary years that the employee must accrue.

Terminal Year: Select when the employee is in the last year of probation.

For example, if the total of required probationary years is 8 and the time to accrue is 1, select this check box. The Time Accrued and Time To Accrue fields display 0 years when you select this check box.

Other Tenure Departments List Section: Skip. Not used.

Click Save

Note: Because of the way PeopleSoft is designed, if your employee had or has previous employment at another state agency of institution, the tenure home will NOT correctly populate as a department of your campus, as the "0" record "owns" this field.

PRIOR EXPERIENCE/CREDITS

Click on the Prior Experience/Credits tab to enter any tenure credit for prior experience.

Prior Experience / Credits Page

Original Start Date: Displays the employee's hire date.

Highest Education Level: Displays the employee's highest level of education.

Total Time Required: Displays the total number of service years required to receive tenure. This value is automatically populated from the Total Required field on the Tenure Data page.

Total Time Accrued: Displays the total number of service years accrued toward tenure. This value is automatically populated from the Time Accrued field on the Tenure Data page. The number changes if you make an online adjustment to the service history.

Prior: Displays the total number of years from prior employment that count toward tenure service (calculated to two decimal places).

Time to Accrue: Displays the number of years remaining to accrue tenure status. This value is automatically populated from the Time To Accrue field on the Tenure Data page. The number of years remaining to accrue tenure status changes if you make an adjustment to the service history.

PRIOR EXPERIENCE CREDIT SECTION

Prior Experience / Credits Page

The screenshot shows a web interface for 'Prior Experience / Credits'. At the top, there are tabs for 'Tenure Data', 'Prior Experience/Credits', and 'Service History'. Below the tabs, there is a 'V1 Test' header and a 'Person ID: 7011208'. The 'Original Start Date' is 07/01/2006 and the 'Highest Education Level' is J-Doctorate (Academic). A 'Summary Totals' section shows: Total Time Required: 6.000000, Total Time Accrued: 0.000000, Prior: 1.000000, and Time To Accrue: [blank]. Below this is a table titled 'Prior Experience/Credit' with columns: *Exp / Credit, Description, *From Date, To Date, Credit Granted, Add to Tenure, Rank, Rank Description, and Notes. A red arrow points to the first row of the table, which contains: 1, PSV, Prior Service Credit, 08/16/2005, 05/15/2006, 1.000000, a checked box, 002, Associate Professor, and Notes.

Exp /Credit: Click the lookup and select Prior Service Credit (PSV).

From Date to Date: Enter the beginning and ending dates of the experience or credit.

Credit Granted: Enter the amount of credit granted for prior experience.

Add to Tenure: Select this box to add these credits to tenure accrual.

Rank: Select the rank at which these credits were earned.

Notes: Enter comments regarding prior experience.

Click Save

SERVICE HISTORY

After the tenure calc process has updated history this page can be used to view the service history for employees and enter service adjustments and codes. For instance, if in the future, Dr. Comet is granted Developmental Leave or is called into the military service for a year before he is granted tenure, his “tenure clock” can be programmed to stop “ticking” during his absence, and then restarted when he returns to active employment.

Service History Page

Total Time Required: Displays the total number of service years required from the Tenure Data page.

Total Time Accrued: Displays the number of years accrued toward tenure.

Prior: Displays tenure credits for prior experience from the Prior Experience/Credits page.

Time To Accrue: Displays the remaining number of years before tenure is granted.

Begin and End Dates: Displays the beginning and ending dates of the tenure in this calculation process. You cannot change these dates if the service history for the period already exists.

Service w/o Breaks: Displays the percent of FTE accrued without service breaks.

Total Service Accrued: Displays the total percentage of services accrued. This field increases incrementally when you run the calculation process.

Accum Breaks: Displays the accumulated service breaks.

Rank: Displays the rank for the calculation group.

Calc Group: Displays the calculation group assigned to this employee.

Gen/Adj: If the calculation process creates the line, this field displays G (generated). If it is entered online, it displays A (adjustment).

Action: Displays the job action, such as LOA (leave of absence), occurring within the requested period.

Reason Code: Displays the reason code associated with the action that makes it count toward accrued tenure.

Adjustment Reason: Select the reason tenure is added to the total tenure accrued. Use this field to adjust tenure accrual history records. You can add a new row or adjust an existing row. You can also modify a record generated by the system. However, running a calculation process in Delete_Rebuild History mode purges the record.

Notes: Click this button to display notes regarding the employee’s tenure history.

Click Save

TENURE CALC PROCESS INSTRUCTIONS

The Tenure Calc Process will need to be run each year prior to printing the Contract Salary letters. The process will be run by someone selected on your campus. The process will update the Time Accrued and Time to Accrue on the Tenure Data and update the Service History page.

Step One – Update Tenure Data

1. Run NDU_HR_TEN_ON_TRK_NOT_TEN_CHG query
 - a. Download to Excel; Save; Open File
 - b. The query lists only the employees with a NTK (Non Tenure on Track) tenure status.
 - c. The query sorts by payroll status
 - d. Review the terminated/retired employees to determine if they should be included in the tenure calculation.

2. NTK (Non Tenure on Track) tenure status requires a tenure calc group.
 - a. Verify NTK tenure status is in the XXX9 or XXX12 calc group.
 - b. The process only includes the NTK tenure status, no other tenure status requires a calc group.
 - c. Go to the appropriate EmplID Tenure Data page at **Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data** and change or remove the calc group; Save.

3. Update Tenure Status
 - a. Terminated employee's Tenure Status should be changed to 'Not Applicable'.
 - i. Change Date should be the termination date.
 - b. Tenured employee's Tenure Status should be changed to 'Tenure' with the Granted Date.

4. Track Date cleanup
 - a. Track Date should be the beginning of the contract, generally 8/16 for 9 month and 7/1 for 12 month.

Step Two – Tenure Calc Process – Normal Run

Batch Tenure Calc Page

1. Run Tenure Calc **Workforce Development > Faculty Events > Calculate Tenure > Perform Tenure Calculations.**
 - a. Add a run control to match the calc group you're running (i.e DSU9)
 - b. From Date should be 8/16/xx (where xx = the beginning of the academic year)
 - c. To Date should be 5/15/xx (where xx = the end of the academic year)
 - d. Calc group should be XXX9 or XXX12 format
 - e. EmplID field should remain blank (unless you need to do a calc for a single employee as later cleanup)
 - f. Choose "Normal Run" for Periodic Processing Mode - E&G in Tenure Processing Type box
 - g. Click Run and then OK, and then Process Monitor link
 - h. Write down the process instance number

2. When the process is Success, navigate to **Workforce Development > Faculty Events > Calculate Tenure > Review Tenure Run Results**
 - a. Input the process instance into the Search
 - b. View how many employees were processed and how many errors are present.
 - c. If errors are present, go to Tenure Data and examine the following about each one
 - i. Check Dates (Original Track date cannot be prior to the hire date in Job Data)
 - ii. Check calc group XXX9 or XXX12 format
 - iii. Verify the accrue tenure flag is checked in Job Data, Employment Data page
 - iv. Verify in Job Data if the employee is terminated, if so, go back to the Tenure Data page and change the Tenure Status to 'Not Applicable'.
 - b. Repeat Step Two, 1 & 2 until errors are clear

3. The Tenure Calc results can be reviewed at **Workforce Development > Faculty Events > Calculate Tenure > Review Tenure Calc Summary**
 - a. Enter the Calc Group in the Service Calculation Group field.
 - b. Review the Tenure Calc Summary which will be updated to Service History during the Update to History Tenure Calc process.
 - i. Only the employees who had a tenure calc successfully process will have a Tenure Calc Summary.

Step Three – Tenure Calc Process - Update to History

1. When Tenure Run Results have 0 Errors, return to **Development > Faculty Events > Calculate Tenure > Perform Tenure Calculations**
 - a. Use the run control to match the calc group you're running (i.e DSU9)
 - b. From Date should be 8/16/xx (where xx = the beginning of the academic year)
 - c. To Date should be 5/15/xx (where xx = the end of the academic year)
 - d. Calc group should be XXX9 or XXX12 format
 - e. EmplID field should remain blank (unless you need to update history for a single employee as later cleanup)
 - f. Choose "Update to History"
 - g. Click Run and then OK, and then Process Monitor link
 - h. Write down the process instance number

2. When the process is Success, navigate to **Workforce Development > Faculty Events > Calculate Tenure > Review Tenure Run Results**
 - a. Input the process instance into the Search
 - b. Verify how many employees were processed and if any errors are present.Navigate to **Workforce Development > Faculty Events > Calculate Tenure > Review Tenure Calc Summary**
 - a. Enter the Calc Group in the Service Calculation Group field. The result should be 'no matching values were found' since the Service History was updated to Tenure Data. If there is any Tenure Calc Summaries it means there was a problem and was not updated to their Service History. Verify if their data is setup correctly.

The Service History page in Tenure Data should now be updated including the Accrual Times.

Step Four – Review Tenure Data

1. Run NDU_HR_Faculty_Appoint query
 - a. Verify that Time Accrued and Time to Accrue have changed
 - b. Verify that Last Processed date is 5/15/xx or 6/30/xx matching the completed tenure processes.
 - c. Update Tenure Data for anyone who has now been granted tenure by the SBHE.
 - i. Change the Tenure Status from Non Tenure On Track to Tenure
 - ii. Enter the Change Date and a Change Reason
 - iii. Enter the Granted Date
 - d. Update Tenure Data for anyone who has had their rank change granted by the SBHE.
 - i. Change the Home Rank
 - ii. Enter the Change Date and a Change Reason
 - e. Update Tenure Date for anyone who has terminated employment.
 - i. Change the Tenure Status to Not Applicable
 - ii. Enter the Change Date and a Change Reason