NOA/NOR Contract Generation

MANAGER SELF SERVICE QUICK REFERENCE GUIDE

THE UNIVERSITY OF ARIZONA
Human Resources

QUESTIONS?
WORKFORCE SYSTEMS
520.621.3664

CONTENTS

CONTRACT GENERATION (NOA/NOR)

WHO CAN GENERATE CONTRACTS?

Users with the College Division Approver Contract Transactions (CT) role have the ability to generate Notice of Appointments /Notice of Reappointments for their College Node.

HR Department Approvers may be included in the review and generation process if the College Division Approver routes the contract list to them. The lists routed to HR Department Approvers will be limited to departments they are authorized to access.

<u>NOA/NOR Contract Generation requires:</u>

- Position Cross-Reference access
- **CT College Division Approver**

CT College Division Approver

- This role provides the user with the ability to Generate Contracts and route them directly to employees or to the HR department for review.

If the college/division approver chooses to route contracts to their respective HR Department Approvers then users must have this role:

- **CT HR Department Approver**

CT HR Department Approver

- This role allows users to review contract lists generated by College Division Approvers and route contracts to employees for acceptance.

College/Divisions determine the individuals authorized to manage NOAs/NORs at both the College/Division and HR department approval levels.

OTHER CONTRACT SECURITY ROLES

- **CT Contract Administrator Role**
  Provisioning of this role is limited to personnel in the President's office, Provost Office and Human Resources. It provides users with campus wide access to generate and hold contracts and to view contract history.

- **CT View All Contract History Role**
  This role is given to limited personnel in the following areas: Attorney's office, Auditing, Records, and Human Resources personnel. It allows users to have campus wide access to view contracts generated and stored in Contract History.

- **CT Systems Control Approver**
  This role is given to Workforce Systems staff. It allows users to have campus wide access to view contracts generated and stored in Contract History.

NAVIGATING THE MANAGER SELF SERVICE MENU

The process to generate NOA's/NOR's is located in UAccess Employee – www.uaccess.arizona.edu

To start the process of Generating or Placing holds on contracts:

1. Click on the Manager Self Service menu item
2. Click on Utilities
3. Click on Administer Contracts

The "Administer Contracts" page provides multiple options for retrieving and/or generating contracts for employees. These options are only available to College/Division Approvers or Contract Administrators.

1. **Generate Contract List**
   a. Allows the user to generate a contract list by HR Dept, College or Employee ID.

2. **Review Contract List**
   a. The first section allows users to return to lists they have SAVED and have not submitted to HR Department Approvers or sent to Employees.
   b. The second section displays a list of contracts that are pending with HR Department Approvers and available for "withdrawal".

3. **Manage Contract Holds**
   a. Allows the user to place hold flags on contracts they are authorized to administer/approve. Users may also REMOVE holds they have placed on contracts, they cannot remove holds that an administrator has placed.

ADMINISTER CONTRACTS

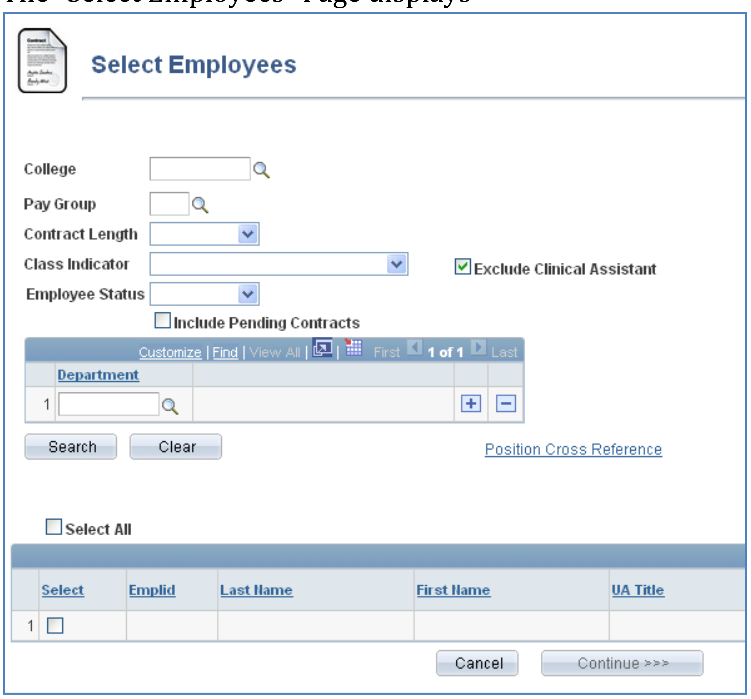
The “Generate Contract List” radio button opens the “Administer Contracts” page and allows the user to create a list of employee(s) for contract generation. This list can be either submitted to HR Dept Approvers for further review or sent directly to the employee for acceptance.

HOW TO GENERATE BY HR DEPT OR COLLEGE

Click on the “HR Dept or College” radio button to create a list of employee(s) for contract generation.

Note: This action moves the transaction to the next page—“Select Employees”.

The “Select Employees” Page displays



FIELDS AVAILABLE TO GENERATE EMPLOYEE LIST

Users may generate lists using the following fields listed below. Only one field is required, however the user may select multiple options to narrow their list.

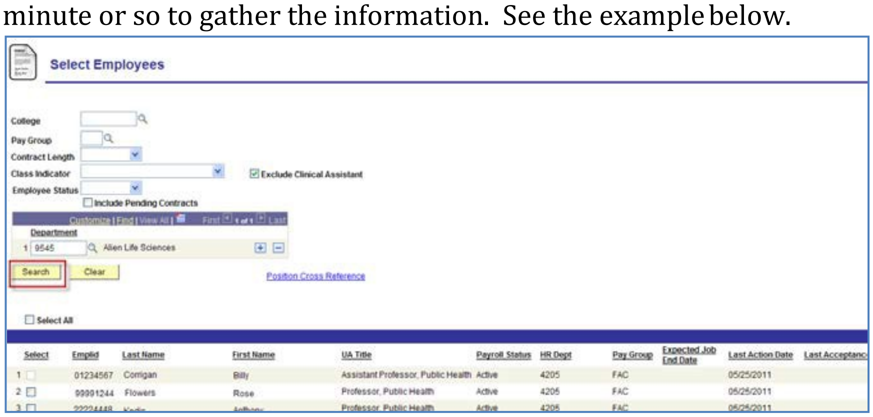
1. College
   a. Enter the college node to pull back all employees by a specific college. Selecting the magnifying glass will show all colleges the user is authorized for.

2. Pay Group
    a. Enter a pay group value or select the magnifying glass to select a pay group. Some examples of pay groups are: Faculty, Appointed 9 month, Appointed 12 month.
3. Contract Length
    a. Select from the drop down list to choose which contract length you would like to appear in your list. The options are: Academic, Fiscal and N/A. If left blank all contract lengths appear in the results.
4. Class Indicator
    a. Select from the drop down list to choose a specific class to search by. Some examples of classified Indicators are: Regular Appointed Academic, Regular Appointed Fiscal, and Clinical Faculty.
    b. The “Exclude Clinical Assistant” is checked by default. De-Selecting this box would include all employees with Clinical Assistant as the classified indicator in your results.
5. Employee Status
    a. Select from the drop down list to choose a specific employee status to search by. Some examples of Employee status are: Active, LOA (leave of Absence) and Sabbatical.
    b. The “Include Pending Contracts” is NOT checked by default. Checking this box would include all employees that have a contract pending submittal or acceptance. Only one contract for an employee can be pending at any time.
6. “Include Pending Contracts” checkbox
    a. When searching for employees, they system by default automatically does NOT include employees who have a pending contract either in their self service or on another list. The system does not allow more than one contract to be pending review/acceptance. To see all employees regardless of whether they are available for contract generation select this checkbox prior to searching.
7. Department
    a. Enter the department number to pull back all employees by a department. Selecting the magnifying glass will show all departments the user is authorized for.
    b. Selecting the + or – sign will allow the user to add additional dept numbers or remove a department number.

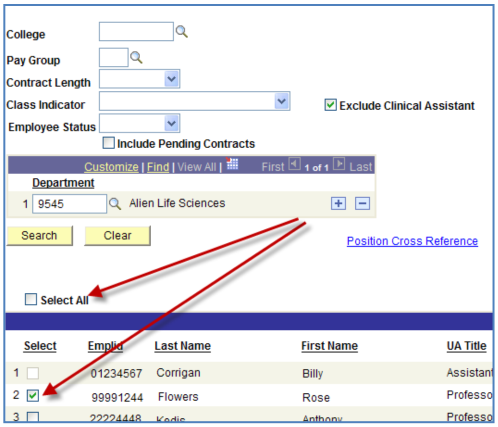
GENERATING A LIST OF EMPLOYEES FOR CONTRACT GENERATION:

Note: If an employee is not available for selection please refer to the section “Columns Displayed When Generating List” for an explanation and action to take to make the employee available.

1. **Search for Employees to Generate Contracts for -** Once the criterion has been selected to generate a list of employees for contracts click the **SEARCH** button to see the results. This search does take a minute or so to gather the information. See the example below.



2. **Select the Employees from your result -** Use the "**Select All**" button to select all employees in the list to generate contracts. Users may also select individual contracts by clicking the checkbox.
    a. Click the "**Continue**" box when done selecting.



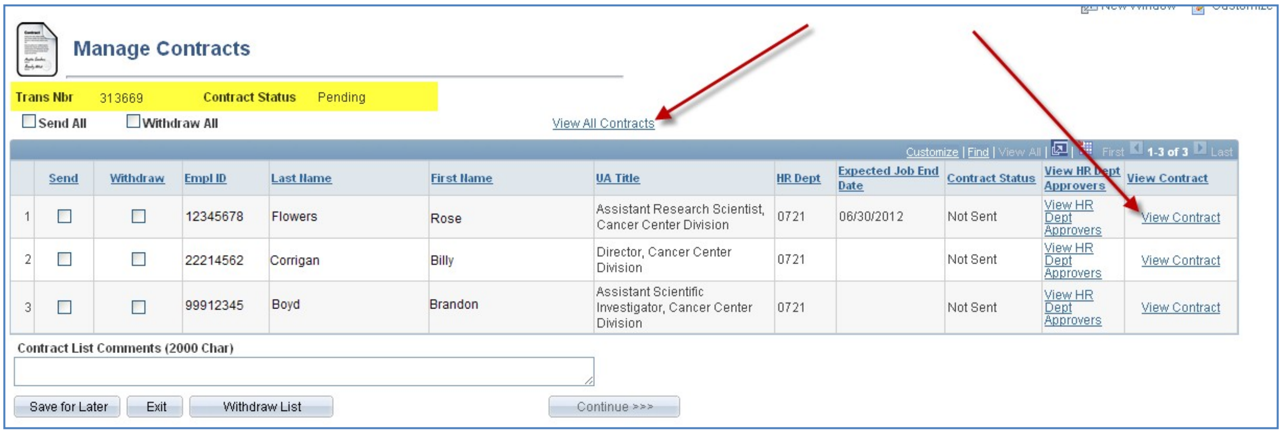
3. **Confirm the Employees Selected** – A read only page will display of the employees you selected for contract generation. Review the list and click "Generate Contracts" to continue with process and have PDF's generated.

    Note: This action moves the transaction to the next page—"Manage Contracts". Please see this next section "Review Generated PDF's and Submit" for details.

    a. Clicking the "Return to Search" button takes the user back to the original search results.
    b. Clicking the "Cancel" button will take the user the main menu for "Administer Contracts".

REVIEW GENERATED PDF'S AND SUBMIT

After the user clicks the "Generate Contracts" button, the "Manage Contracts" page appears with a PDF version of the Notice of Appointment or Notice of Re-Appointment for review. A transaction number also displays for reference and the Contract Status is set to PENDING.



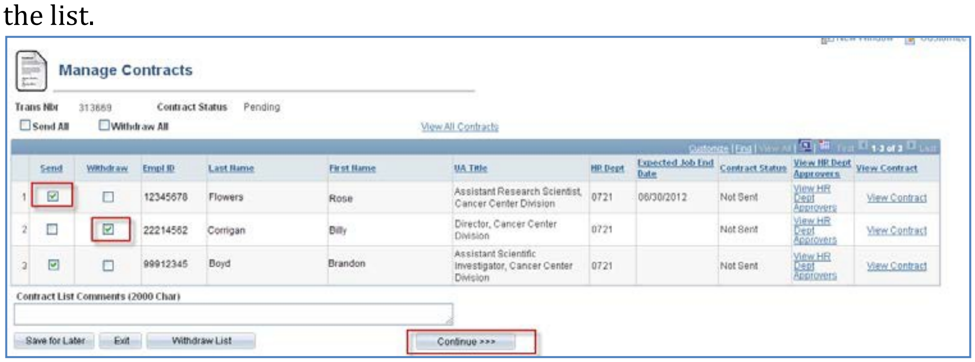
1. Click the link "**View Contract**" to display an individual contract for the employee on the line selected. Verify the information is correct on the contract.

   Note: Users may also click to "View All Contracts" link to have one master file of PDFs available to view and or print.

2. Select Employees that are ready to be sent.
   a. Users may click the "**Send All**" button to select the entire list or select individuals by clicking the box in the "**SEND**" column next to each employee. This activates the continue button.

   b. If an employee should **NOT** be sent a contract due to information incorrect or timing select the "**Withdraw**" box. This will stop the contract from moving forward in the process.
3. Enter optional Comments.
   Users may enter optional comments that will carry forward with the list to the HR Department Approver.

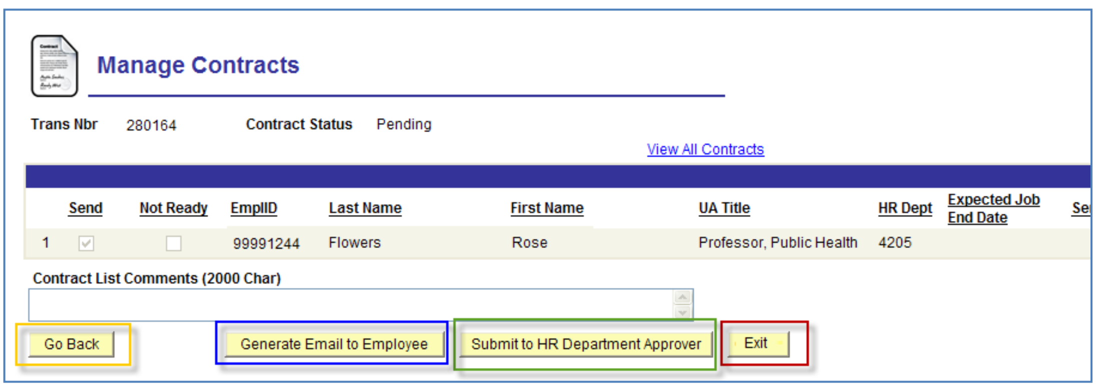
4. Click "**Continue**" button to move forward in the process.
   a. Users must select either SEND or WITHDRAW for all employees listed. A warning message will display and they will not be allowed to continue if a selection is not made for each employee in the list.



i. Select the "**Save for Later**" button if you wish to continue reviewing the list at another time. Please refer to "Reviewing Contract List" for details on how to return to work in progress.
ii. Select the "**Exit**" button if you wish to leave the page without saving changes. List is automatically available in your Review Contract List.
iii. Select the "**Withdraw List**" button if you want to cancel the entire transaction. This changes the overall list status to Withdrawn and the employees are available for you to generate contracts when ready.

5. Confirmation Page – Generate Email to Employee or Submit to HR Department Approver
    a. Click the "**Generate Email to Employee**" button if you are ready to send the contract directly to the employee and bypass an HR Department Approver Review. Employees will receive an email with a link directing them to the contract to accept within UAccess Self Service.
        i. The Contract Status will change to "Email(s) Sent to Employee".

    b. Click the "**Submit to HR Department Approver**" if you would like to forward the list to authorized HR Department Approvers for an additional review. These users will receive the list in their pagelet and will have the ability to review the list and submit to the employee.
        i. The Contract Status will change to "Submitted to HR Department Approver"



ii. Click the "**Go Back**" button to return to the list to make changes.
iii. Click the "**Exit**" button to return to the Manage Contracts page.

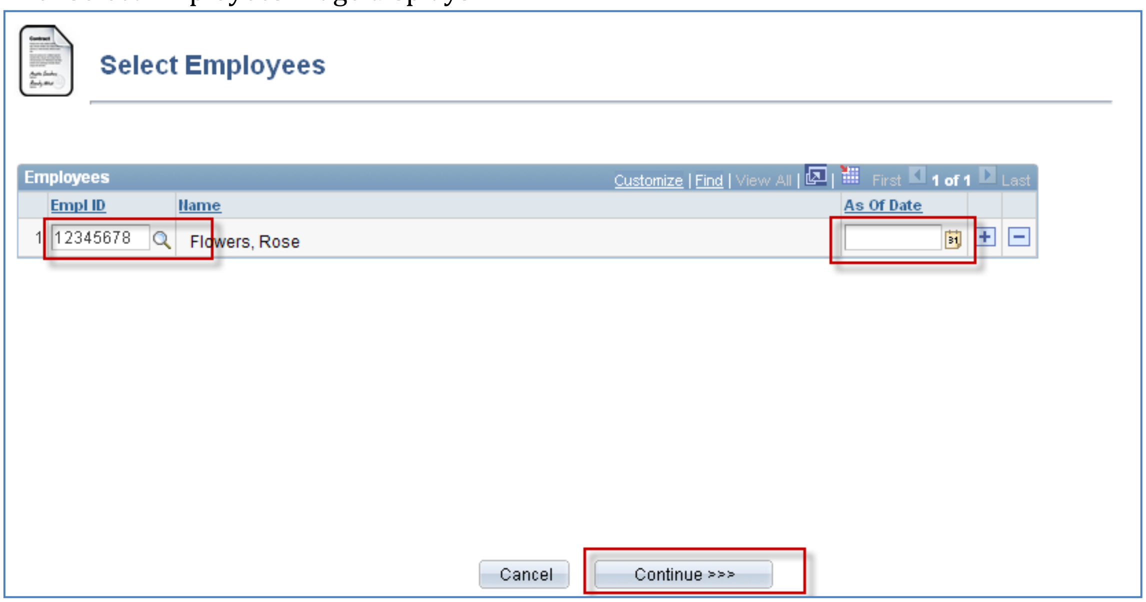
*NOTE: Upon clicking the "**Submit to HR Department Approver**" button the system will validate each dept to see if a user is authorized to review the list. If no users are found for one or more depts. The College/Division Approver is not allowed to send the list to HR Department. Please refer to "Error/Warning Message" section for additional details.*

HOW TO GENERATE CONTRACTS BY EMPLOYEE

Click on the "Employee" radio button to create a list of employee(s) which will be used to generate contracts.

Note: This action moves the transaction to the next page—"Select Employees".

The "Select Employees" Page displays



FIELDS AVAILABLE TO GENERATE EMPLOYEE LIST

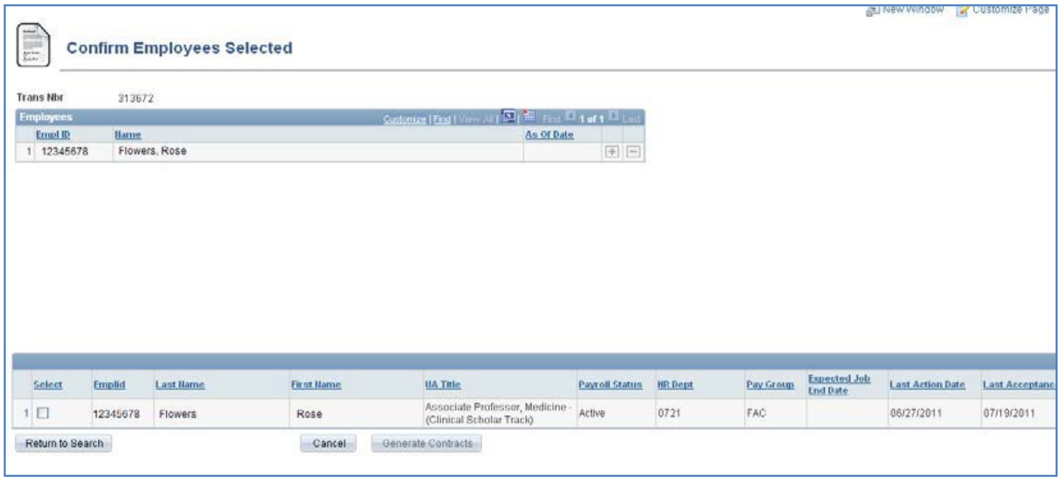
Users may generate lists using the following fields:

1. Emplid
   a. Enter the employees EmplID. Selecting the magnifying glass allows the user to search for an employee by First Name, Last Name and Name.
   b. Click the + to add additional employees or click the – sign to remove employees.
   c. Click the CONTINUE button.

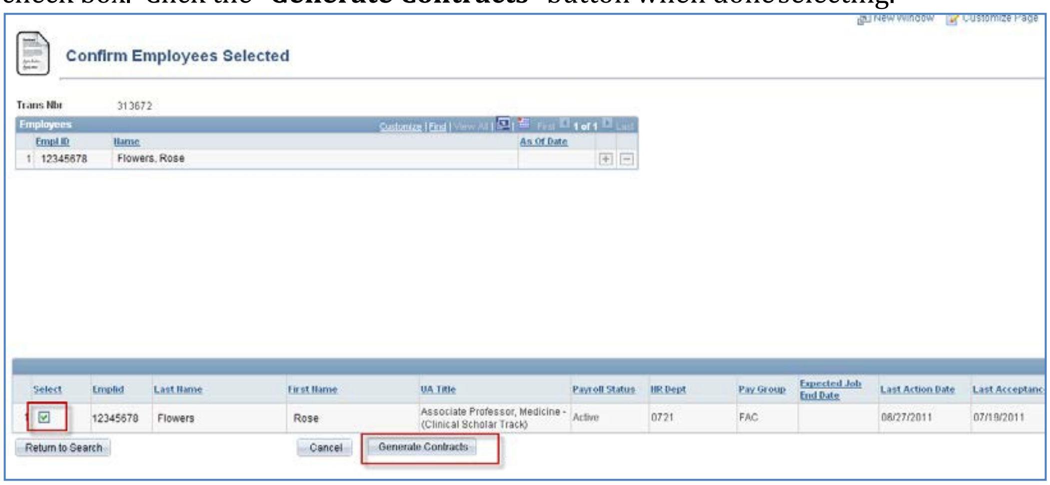
GENERATING A LIST OF EMPLOYEES FOR CONTRACT GENERATION:

Note: If an employee's name does not appear in the selection list, please refer to the "Columns Displayed When Generating List" section for an explanation and recommended action.

1. **Search for Employees to Generate Contracts for -** Once the criterion has been entered to generate a contract list consisting of a single or multiple employees--click the **Continue** button to see the results. This search takes a minute or so to gather the information. See the example below.



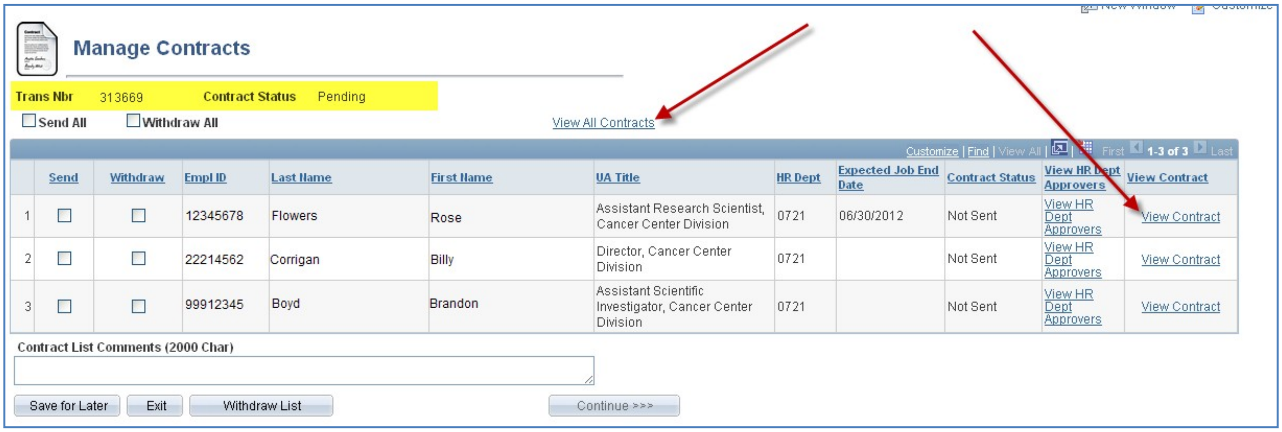
2. **Select Multiple Employees from your Results** or select individual contracts by clicking the "Select" check box. Click the "**Generate Contracts**" button when done selecting.



   a. Click the "Return to Search" button to return to the original search results.
   b. Click the "Cancel" button to return to the main menu for "Administer Contracts".

REVIEW GENERATED PDF'S AND SUBMIT

After the user clicks the "Generate Contracts" button, the "Manage Contracts" page appears and displays a link with a PDF version of the Notice of Appointment or Notice of Re-Appointment. A transaction number also displays, and the Contract Status is set to PENDING.



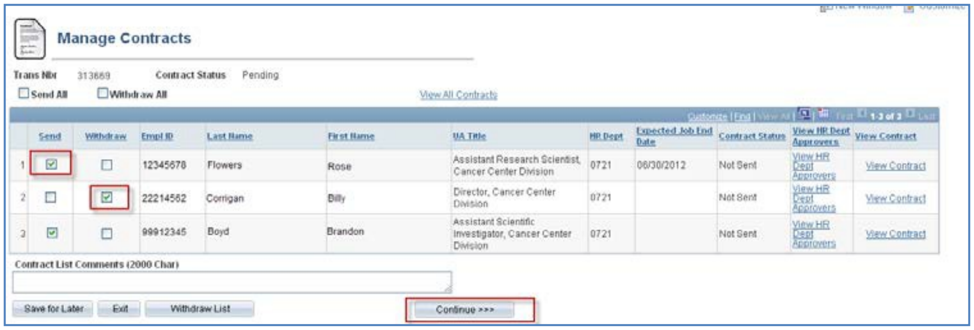
6. Click the "**View Contract** link to display an individual contract for the employee on the line selected. Verify the information is correct on the contract.

   Note: Users may also click to "View All Contracts" link to have one master file of PDFs available to view and/ or print.

7. Select the contracts that are ready to be sent to employees
   a. Click the "**Send All**" button to select the entire list or select individuals by clicking the box in the "**SEND**" column next to each employee. This activates the continue button.

   b. If an employee should **NOT** be sent a contract due to incorrect information or timing, select the "**Withdraw**" box. This will stop the contract from moving forward in the process.
8. Enter Optional Comments.
   Users may enter optional comments that will carry forward with the list to the HR Department Approver.

9. Click "**Continue**" button to move forward with the process.
   a. Users must select either SEND or WITHDRAW for all employees listed. A warning message will display and they will not be allowed to continue if a selection is not made for each employee listed.



i. Select the "**Save for Later**" button to continue reviewing the list at another time. Please refer to "Reviewing Contract List" for details on how to return to work in progress.

ii. Select the "**Exit**" button to leave the page without saving changes. The list is automatically available in your Review Contract List.

iii. Select the "**Withdraw List**" button to cancel the entire transaction. This changes the overall list status to Withdrawn and the employee records become available to regenerate contracts.

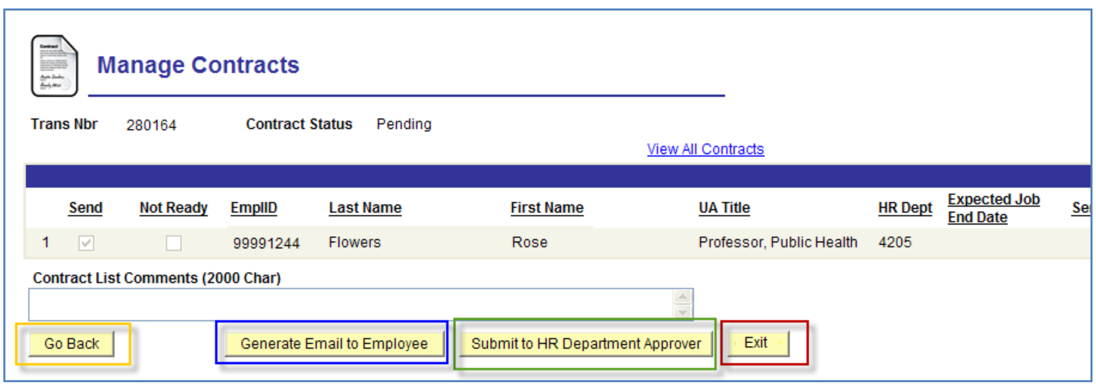
10. Confirmation Page – Generate Email to Employee or Submit to HR Department Approver

a. Click the "**Generate Email to Employee**" button to send the contract directly to the employee and bypass an HR Department Approver Review. Employees will receive an email which includes both a link directing them UAccess Self Service contract page and instructions for accepting the contract.

i. The Contract Status will change to "Email(s) Sent to Employee".

b. Click the "**Submit to HR Department Approver**" to forward the list to authorized HR Department Approvers for an additional review. The list will appear in their pagelet and will allow them to review the list and to release contracts by generating emails to the employees.

i. The Contract Status will change to "Submitted to HR Department Approver"



ii. Click the "**Go Back**" button to return to the list to make changes.

iii. Click the "**Exit**" button to return to the Manage Contracts page.

*NOTE: Upon clicking the "**Submit to HR Department Approver**" button, the system will validate each dept to see if a user is authorized to review the list. If no users are found for one or more departments, the user is not allowed to send the list to HR Department. Please refer to "Error/Warning Message" section for additional details.*

COLUMNS DISPLAYED WHEN GENERATING A LIST

The following columns are displayed when a user enters search criteria or an EMPLID to generate a list of employees which will be used to generate contracts. There are times when an employee will be in "Read Only" format and cannot be selected for contract generation. The columns below will explain exceptions and what the user can do to release employee records for contract generation.

Column Name	Description	Action to Take if Read only
Emplid	Displays the Employee ID	
Last Name	Displays the employees Last Name	
First Name	Displays the employees First Name	
UA Title	Displays the employees Primary UA Title	
Payroll Status	Displays the employees Payroll Status. Values include: Active, Leave w Pay, Leave without Pay, Work Break.	An employee may display as "Read Only" if they have the status of "Work Break". User must follow the business process set to change this status with Workforce Systems to Active.
HR Dept	Displays the employees Primary Home Dept.	
Pay Group	Displays the employees Pay Group. Values include: AG - Farm Workers AP9 - Appointed 9 Month APP - Appointed 12 Month FA9 - Faculty 9 Month FAC - Faculty 12 Month FED - Federal Employee PPP - Appointed Positive Report PTE - Part Time Employee Exception PTP - Part Employees Positive Report	
Expected Job End Date	Displays an Expected Job End Date, if one exists for the employee	
Last Action Date	Displays the Last Action Date that occurred on the employees Job Record. This may aid in selecting an employee if an update has been made.	

List continues on the next page….

Column Name	Description	Action to Take if Read only
Last Acceptance Date	Displays the last date an employee accepted a contract. This may aid in whether or not a new contract should be submitted to the employee.	
Termination Pending	Determines whether or not an employee has an MSS Termination Request Pending. Values include: YES or NO	An employee may display as "Read Only" if they have the status of "YES". User must perform a "Manage Termination/Retirement" search to either have the imitator "withdrawal" the request. If they are an authorized approver for this termination request they may also deny. An employee may not have a contract generated if a termination request is pending.
Pending Contract	Displays whether or not a contract is pending in another list. By default pending contracts do not display when searching. Users must select to "include pending contracts" to view. Values include: Yes or No	An employee may display as "Read Only" if they have the status of "YES". This means the employee already has a contract generated in a list that is pending with the College, HR Department or the employees Self Service folder. Only one contract can be generated at a time for an employee. In order to make the employee available again, the user must either withdrawal the list where the employee is included or select the "Remove" button if it is in the employees Self Service button. Please refer to the respective section for additional details.
Hold Status	Displays whether or not an employee is being held for contract generation. Values include: Yes or No	An employee may display as "Read Only" if they have the status of "YES". This means the employee has a "HOLD" on their contract. The column "held by" will indicate who placed the hold. User must contact this employee to release the hold if it is not someone within their College. If the hold was placed by another college user please refer to the section for removing holds.
Held By	Displays the Users name who placed the hold.	

HOW TO WITHDRAW A CONTRACT LIST

College users have the ability to withdraw an entire contract list by accessing the specific transaction in the "Review Contract List" area under Administer Contracts or by navigating to and searching the "Manage Contracts" page.

Users may only withdraw contract lists if the overall contract status is "Submitted/Submitted to HR Department Approvers".

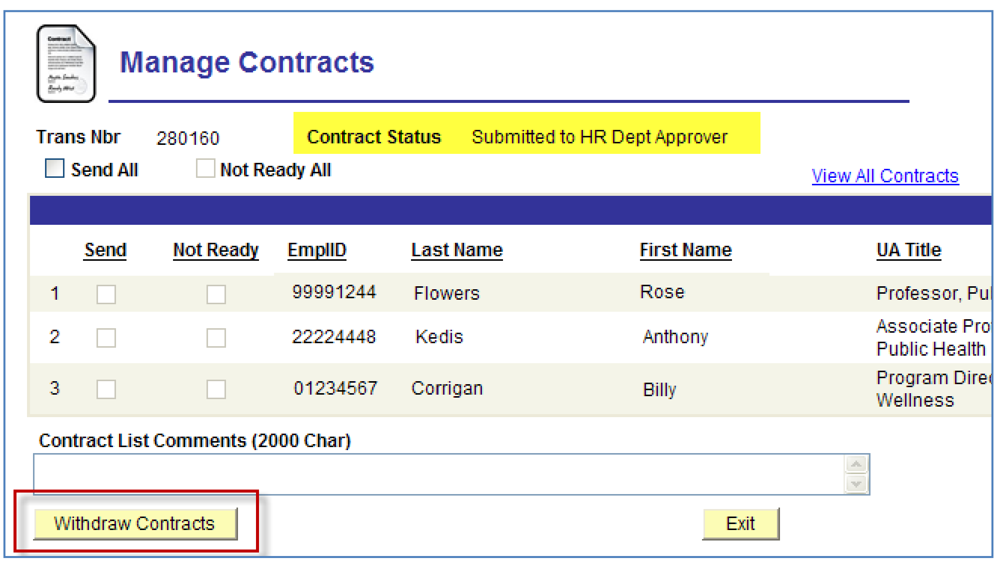
Withdrawing the request removes the list thus making it unavailable to HR Department Approvers, and cancels the overall transaction. College users may withdraw a request up until a contract has been sent to the employee.

If the employee contract status is "Waiting", users must "Remove" the contract from the self service area. Please refer the section "Removing from Employee Self Service" for details.

There are two ways to withdraw a list. Please see section below.

1. Navigate to Manager Self Service > Utilities > Administer Contracts
    a. Select "Review Contract List"
    b. Select a list in the "Submitted to HR Dept" section.
    c. Select "View" next to the list to withdraw. The list will open up in the Manage Contracts page and the "Withdrawal" button will be available.

2. Navigate to Manager Self Service > Utilities > Manage Contracts
    a. Search for the list in the "Manage Contracts".
    b. Once the transaction is selected and opened, click the "Withdraw" button.



HR DEPARTMENT APPROVERS

Contracts lists pending review can either be accessed through the "Pagelet" or the "Manage Contracts" page. The option to review and send a contract list will only appear if the user has both the appropriate approval role and the authorized depts.

College Division Approvers will generate lists and route them to HR Department Approvers for review. The college has the option to email the employee directly and bypass the HR Department Approvers. If this occurs an email will be sent to existing HR Department Approvers notifying them that a contract has been sent.

VIEWING PENDING CONTRACT LISTS

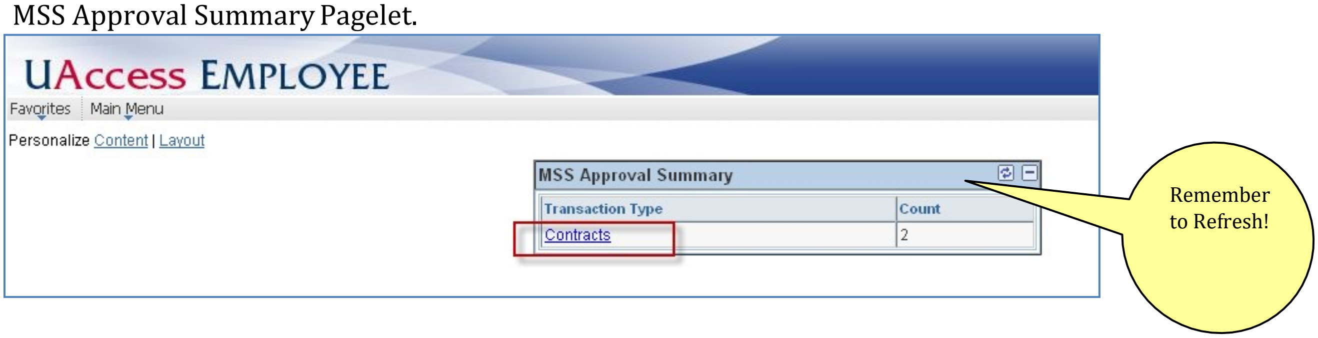
Pending approval requests are available for viewing in two formats:

- Pagelets
- Manage Contracts

HOW HR DEPT APPROVERS KNOW CONTRACTS ARE PENDING ACTION

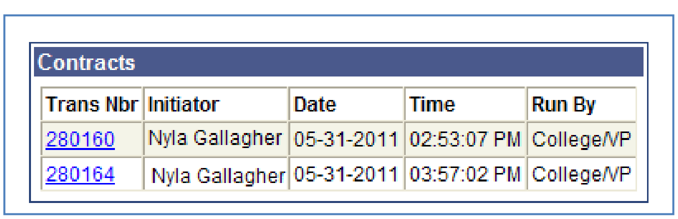
The UAccess Employee main page automatically displays a "pagelet" summary which lists transactions pending the individual approver's action.

- The "pagelet" provides a "transaction" link directly to the transactions requiring the user's approval.
- Each transaction type displays a total count of transactions available for approval.
- Selecting the "home" key on the first tab on the upper right side of any page will return the user to the MSS Approval Summary Pagelet.



Note: if a transaction type link is not available, this means no requests are available for approval at this time. Please click the Refresh icon to confirm.

- Once a user selects a transaction type from the MSS Approval Summary they are directed to the individual transaction pagelet.
- Each transaction displays details to assist the user with determining the list to work next.

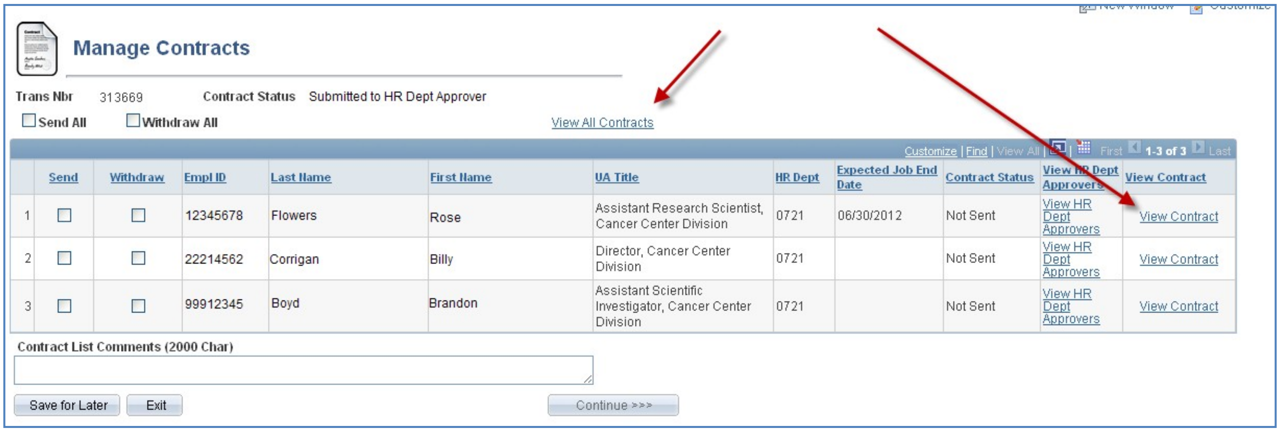


Contracts

Trans Nbr	Initiator	Date	Time	Run By
280160	Nyla Gallagher	05-31-2011	02:53:07 PM	College/VP
280164	Nyla Gallagher	05-31-2011	03:57:02 PM	College/VP

REVIEW GENERATED PDF'S AND SUBMIT

After the user clicks the link in their contracts pagelet, the "Manage Contracts" page appears with a PDF version of the Notice of Appointment or Notice of Re-Appointment for review. The transaction number and the Contract Status of "Submitted to HR Dept Approver" displayed at the top of the page are important for future reference.


Manage Contracts

Trans Nbr 313669 Contract Status Submitted to HR Dept Approver

Send All Withdraw All View All Contracts

Customize | Find | View All | First 1-3 of 3 Last

	Send	Withdraw	Empl ID	Last Name	First Name	UA Title	HR Dept	Expected Job End Date	Contract Status	View HR Dept Approvers	View Contract
1	☐	☐	12345678	Flowers	Rose	Assistant Research Scientist, Cancer Center Division	0721	06/30/2012	Not Sent	View HR Dept Approvers	View Contract
2	☐	☐	22214562	Corrigan	Billy	Director, Cancer Center Division	0721		Not Sent	View HR Dept Approvers	View Contract
3	☐	☐	99912345	Boyd	Brandon	Assistant Scientific Investigator, Cancer Center Division	0721		Not Sent	View HR Dept Approvers	View Contract

Contract List Comments (2000 Char)

Save for Later Exit Continue >>>

11. Click the link "**View Contract**" to display an individual contract for the employee listed on the line selected. Verify the contract information is correct.

    Note: Users may also click the "View All Contracts" link to have one master file of PDFs available to view and/or print.
12. Select Employees that are ready to be sent.
    a. Click the "**Send All**" button to select the entire list or select individuals by clicking the box in the "**SEND**" column next to each employee. This activates the continue button.
    b. The HR Dept Approver can send contracts to single or multiple employees at a time and continue working the list. If all employees on the list are not selected, the status automatically changes to" Emails in Progress".
    c. If an employee should **NOT** be sent a contract due to incorrect information or timing, select the "**Withdraw**" box. This will stop the contract from moving forward in the process.

    Example : The continue button is available to send contracts to the two employees selected.


Manage Contracts

Trans Nbr 313669 Contract Status Submitted to HR Dept Approver

Send All Withdraw All View All Contracts

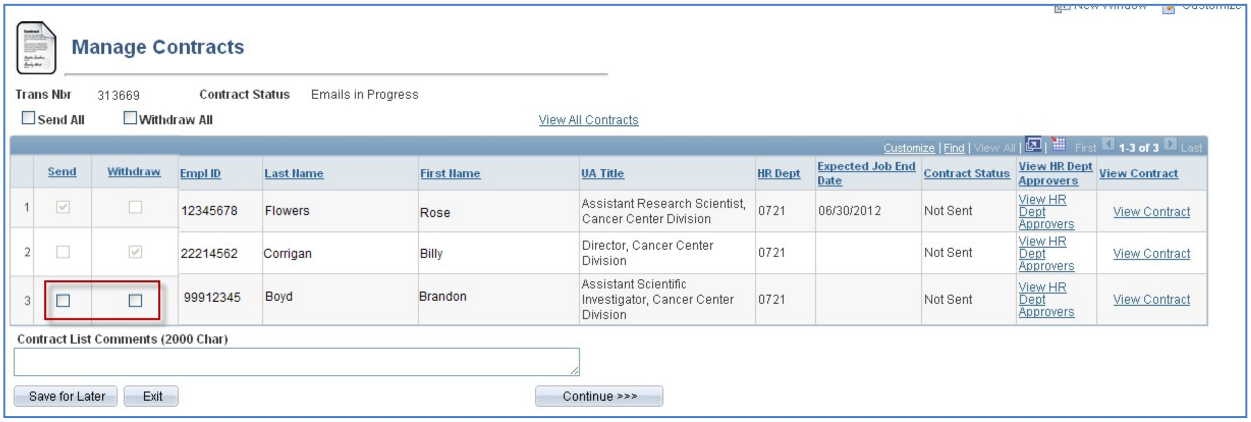
Customize | Find | View All | First 1-3 of 3 Last

	Send	Withdraw	Empl ID	Last Name	First Name	UA Title	HR Dept	Expected Job End Date	Contract Status	View HR Dept Approvers	View Contract
1	☑	☐	12345678	Flowers	Rose	Assistant Research Scientist, Cancer Center Division	0721	06/30/2012	Not Sent	View HR Dept Approvers	View Contract
2	☐	☑	22214562	Corrigan	Billy	Director, Cancer Center Division	0721		Not Sent	View HR Dept Approvers	View Contract
3	☐	☐	99912345	Boyd	Brandon	Assistant Scientific Investigator, Cancer Center Division	0721		Not Sent	View HR Dept Approvers	View Contract

Contract List Comments (2000 Char)

Save for Later Exit Continue >>>

When the user returns to list, the two previously selected rows are greyed out and cannot be accessed; however, the last remaining row is available and can be clicked on to send the email forward or withdraw the contract.



If user selects “Withdraw” on the last user in the list, the “Complete Transaction” button appears and allows the user to finish closing the list. This button only appears in this situation.

i. Select the “**Save for Later**” button if you wish to continue reviewing the list at another time. All selections are saved and the list stays in the user’s pagelet.
ii. Select the “**Exit**” button if you wish to leave the page without saving changes. The list remains in the user’s pagelet.

13. Click “**Continue**” button to move forward in the process and select the “Generate Email to Employee” button.

14. Confirmation Page – Generate Email to Employee or Submit to HR Department Approver
    a. Click the “**Generate Email to Employee**” button if you are ready to send the contract to the employee. Employees will receive an email which includes both a link directing them UAccess Self Service contract page and instructions for accepting the contract.

Note: If the user has not selected a Send or Withdraw on every employee, the list remains in their pagelet to continue working.

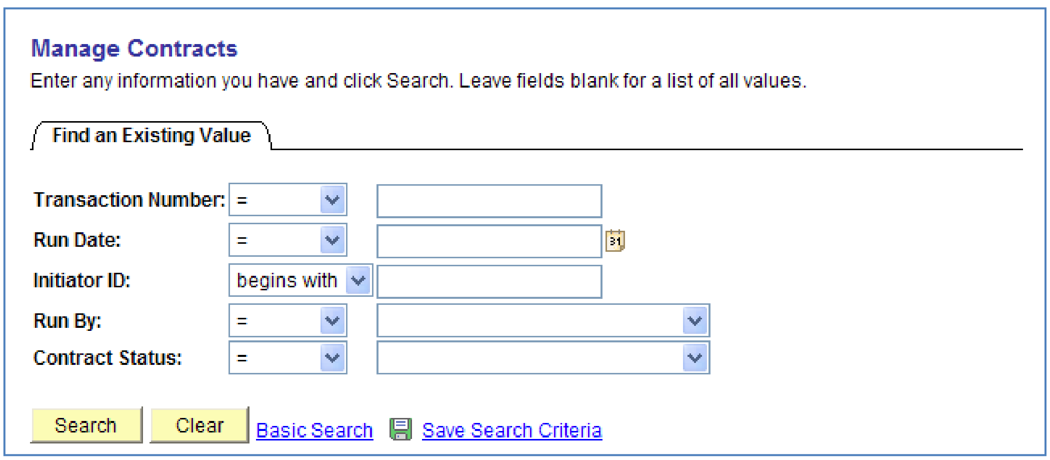
MANAGE CONTRACTS

The “Manage Contracts” allows users with a College Division Approver or HR Department Approver role to view contract lists that are pending, submitted or sent.

This search also allows the College Division Approver to open and withdraw a transaction list or remove a contract from an Employee Self Service page as a College Division or HR Department Approver. Please see the following sections for additional details: “How to Withdraw a Contract List” and “Removing from Employee Self Service”.

The Search dialog box provides multiple options for accessing contract lists.

1. Enter criteria listed in the Search dialog box
2. Users may also click on the “Search” button to display all lists they are authorized to view. A list of values that meet the search criteria will be returned.
3. Click on any of the values listed to access the contract list.



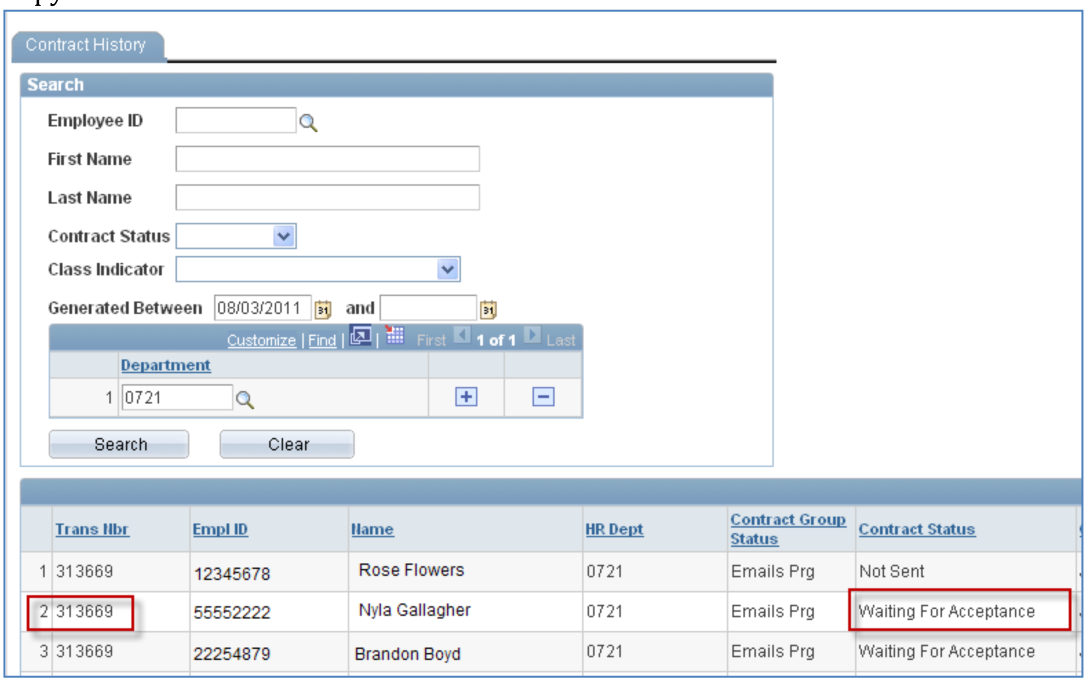
REMOVING A CONTRACT FROM EMPLOYEE SELF SERVICE

College users have the ability to "REMOVE" a contract from the employees self service area if the contract has **NOT** been accepted by the employee. The employee contract status must read "Waiting" to be able to remove the contract from the self service area. If the contract has been accepted, a new contract must be generated if changes are needed.

To remove a contract, navigate to the "Manage Contracts" page and search for the contract list that includes the employee. If the employee contract status is "NEW" and the Contract list status is "Submitted to HR Department Approver" users must "withdraw" the list. Please refer the section "How to withdraw a contract list" for details.

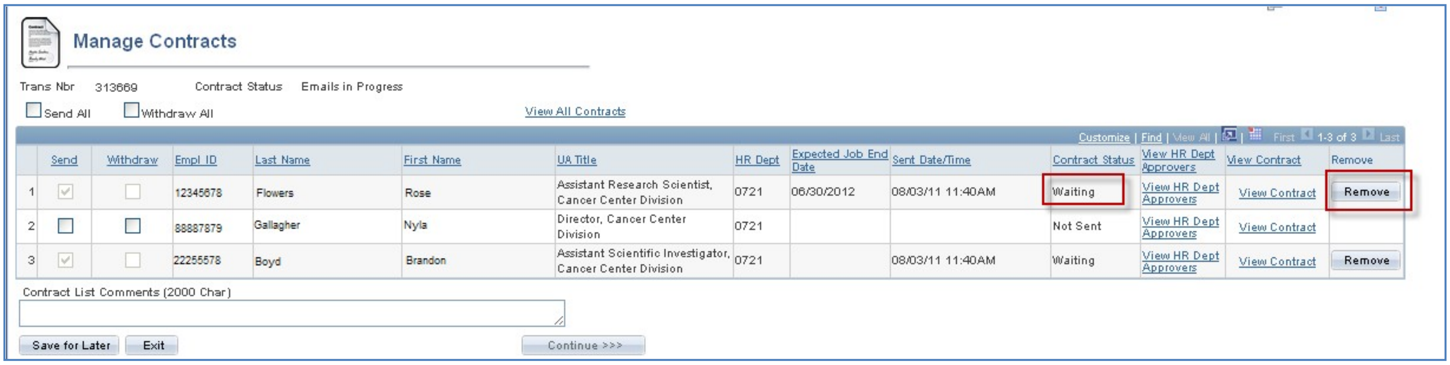
How to remove a contract from an Employee's Self Service page:

1. Navigate to the Contract History Page: Manager Self Service > Utilities > Contract History
   a. Use any of the search fields to access the employee's record (see screen shot below)
   b. Locate the employees name on the list
   c. Verify the contract status is still "pending"
   d. Copy the "Trans Nbr"



2. Navigate to Manager Self Service > Utilities > Manage Contracts
   a. Search for the list by entering the Transaction Number from the contract history search.
   b. Once the transaction list is opened, click the "Remove" button on the employee's row.
   c. The contract will be removed from the Employee's Self Service page and the individual contract status will change to REMOVED.

The screen shot below shows the screen when selecting an Employee to REMOVE.



Manage Contracts

Trans Nbr 313669 Contract Status Emails in Progress

Send All Withdraw All View All Contracts

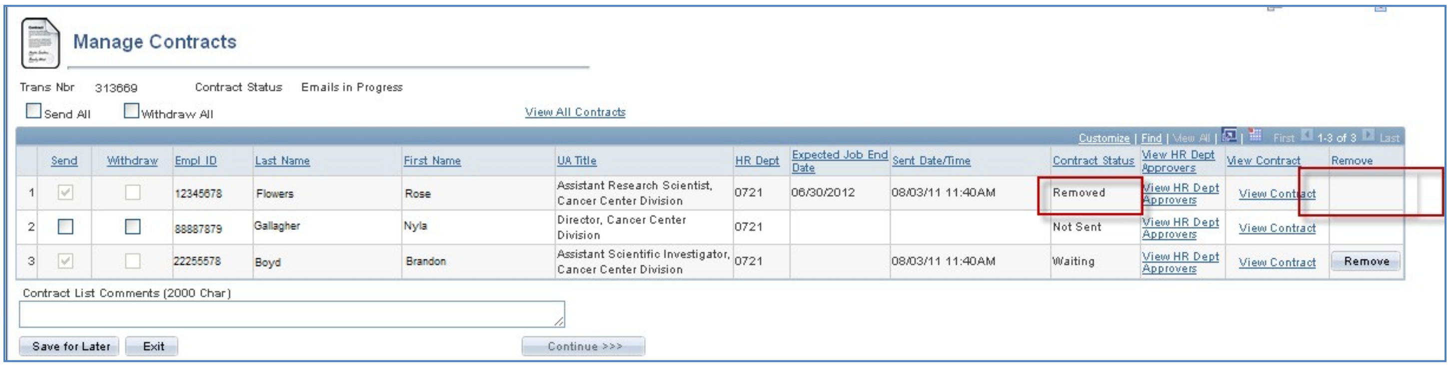
Customize | Find | View All | First 1-3 of 3 Last

	Send	Withdraw	Empl ID	Last Name	First Name	UA Title	HR Dept	Expected Job End Date	Sent Date/Time	Contract Status	View HR Dept Approvers	View Contract	Remove
1			12345678	Flowers	Rose	Assistant Research Scientist, Cancer Center Division	0721	06/30/2012	08/03/11 11:40AM	Waiting	View HR Dept Approvers	View Contract	Remove
2			88887879	Gallagher	Nyla	Director, Cancer Center Division	0721			Not Sent	View HR Dept Approvers	View Contract	
3			22255578	Boyd	Brandon	Assistant Scientific Investigator, Cancer Center Division	0721		08/03/11 11:40AM	Waiting	View HR Dept Approvers	View Contract	Remove

Contract List Comments (2000 Char)

Save for Later Exit Continue >>>

After you have REMOVED the employee's contract, the status will change to "Removed" and the button is no longer available.



Manage Contracts

Trans Nbr 313669 Contract Status Emails in Progress

Send All Withdraw All View All Contracts

Customize | Find | View All | First 1-3 of 3 Last

	Send	Withdraw	Empl ID	Last Name	First Name	UA Title	HR Dept	Expected Job End Date	Sent Date/Time	Contract Status	View HR Dept Approvers	View Contract	Remove
1			12345678	Flowers	Rose	Assistant Research Scientist, Cancer Center Division	0721	06/30/2012	08/03/11 11:40AM	Removed	View HR Dept Approvers	View Contract	
2			88887879	Gallagher	Nyla	Director, Cancer Center Division	0721			Not Sent	View HR Dept Approvers	View Contract	
3			22255578	Boyd	Brandon	Assistant Scientific Investigator, Cancer Center Division	0721		08/03/11 11:40AM	Waiting	View HR Dept Approvers	View Contract	Remove

Contract List Comments (2000 Char)

Save for Later Exit Continue >>>

CONTRACT HISTORY

The Contract History page allows users to search for an employee within a contract list and view the following:

- Contract Generated
- Contract List Status
- Individual Contract Status
    - This will indicate if the employee has accepted.
- Name of Employee that Originally Sent The Contract
- Last Date and Time Contract was viewed by the Employee

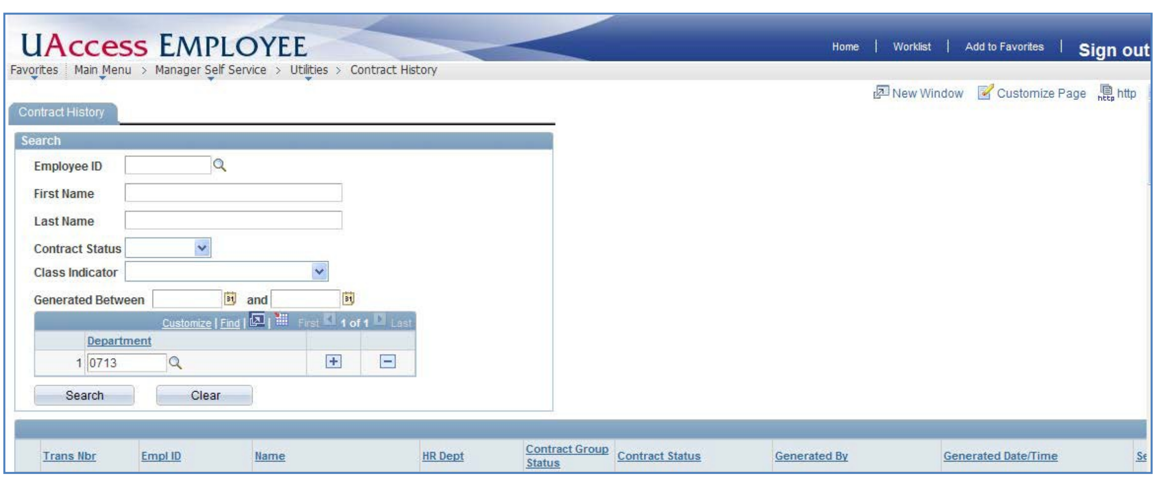
In order to have access to this page a user must have one of the Contract roles within MSS. The outline below signifies what an employee can view when opening up this page based on their role.

Role Description	Technical Name	Access
CT Administrator	UA_HR_WA_MSS_WCT_Admin	ALL contracts for ALL depts
CT View ALL Contract History	UA_HR_WA_MSS_WCT_View	View ALL contracts for ALL depts
CT College Division Approver	UA_HR_WA_MSS_WCT_Col_Apr	View contracts for all depts that roll up to their college node.
CT HR Department Approver	UA_HR_WA_MSS_WCT_HR_Dpt_Apr	View contracts for all depts they are authorized for. This includes positions for which their college is not primary.

How to view a contract for an employee in Contract History:

1. Navigate to Manager Self Service > Utilities > Contract History
    a. Enter criteria to search for an individual employee's contract.
        i. Users may also click the "SEARCH" button to display all contracts they are authorized to view. This is not recommended for Contract Administrators, as they have full access.
    b. The search returns a page which displays the overall status as well a PDF link to the contract sent to the employee.

The screen shot below shows an example of this screen



Below is the list of possible status for both the Contract Lists and the individual Contract Status. Both Contract Lists and individual employee contracts have separate statuses.

The overall list of employees in a single contract transaction has a "group" status.

Contract Group Status	Description
Completed	All employees have accepted. The list is complete.
Emails Prg	Emails are in progress. The list may have multiple depts reviewing the contracts or only part of the emails have been sent to the employees.
Pending	Indicates the contract is pending with the College Division Approver. The college has generated this employee in a list but has not sent to the employee yet or the HR Dept approver.
Sent	Indicates a selection was made to all of the employees in the list and contracts were sent to one or more individuals.
Submitted	Indicates the contract is pending with the HR Department Approver(s). Select the "View HR Dept Approvers" link to see who the list is pending with.
Withdrawn	Indicates the College Division Approver has WITHDRAWN the contract list. The entire list was cancelled.

The individual employee contracts have their own status to indicate their current state, i.e. accepted, withdrawn, etc.

Contract Status	Description
Accepted	Indicates the Employee has Accepted their contract.
Error	Indicates an error has occurred with generating the contract. This typically happens if employee does not have an UA Offical Email on file or have not activated their profile for Uaccess Employee. The MSS Administrator is also notified and will contact dept or college.

Contract Status	Description
Not Sent	The contract is pending with either the College or HR Dept Approver. Contract has not been sent to the employee.
Removed	Indicates the College or HR Department Approver sent the contract to the employee but REMOVED it from Self Service after being sent.
Waiting	Indicates the contract has been sent to the employee and is awaiting acceptance.
Withdrawn	Indicates the College or HR Dept user has removed the contract from moving forward in the process. The contract was cancelled from the individual list and would need to be re-generated once changes made or when college is ready to send.

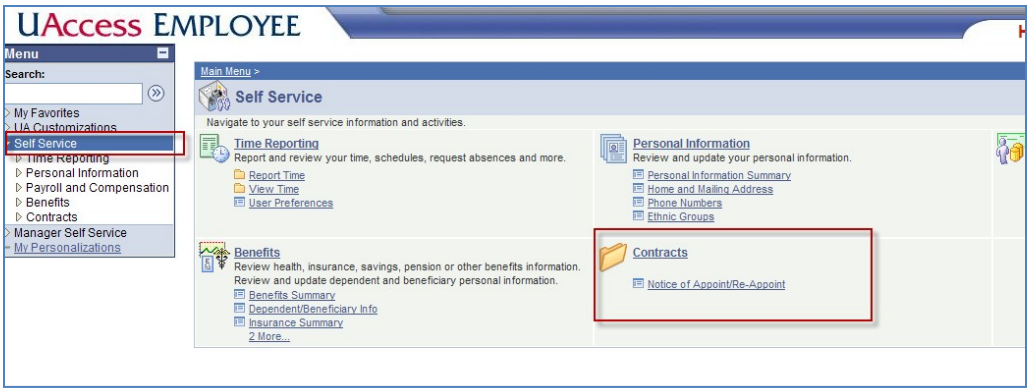
EMPLOYEE ACCEPTANCE OF CONTRACT

Employees will receive an email which will alert them that a contract is available for review and acceptance. A link will be included in the email which will take them to the contract page within Employee Self Service. Employees may also navigate to the page directly should they misplace the email. Please see an example of this email at the end of this section.

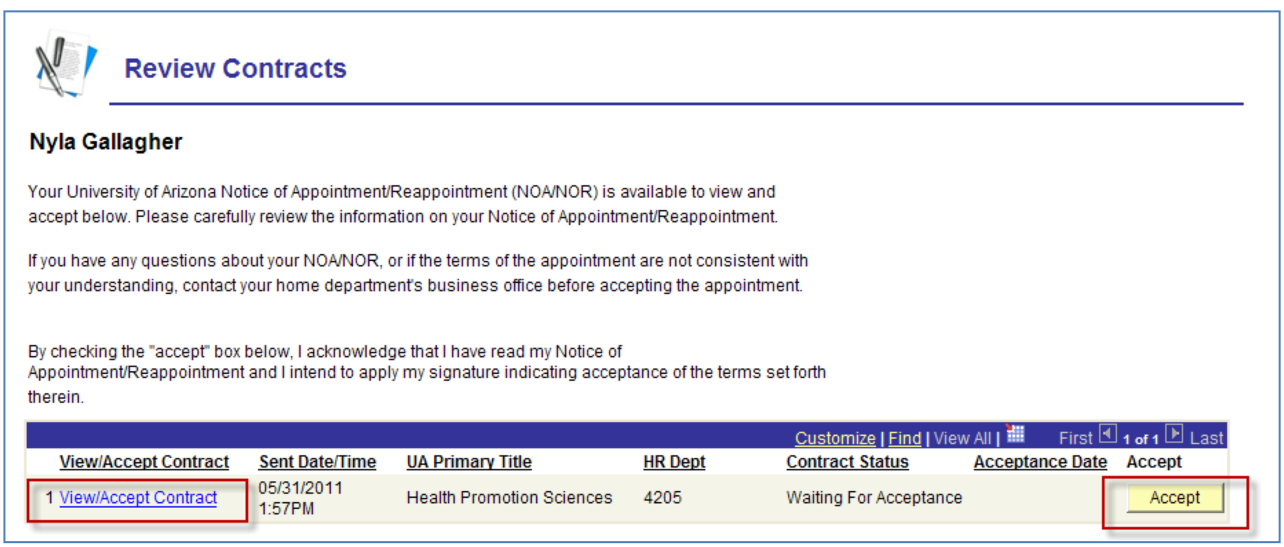
How to view/accept a contract as an employee:

1. Navigate to Self Service > Contracts> Notice of Appoint/Re-Appoint
2. Click on the "Notice of Appoint/Re-Appoint link. This will direct the employee to the "View/Accept" contract page.

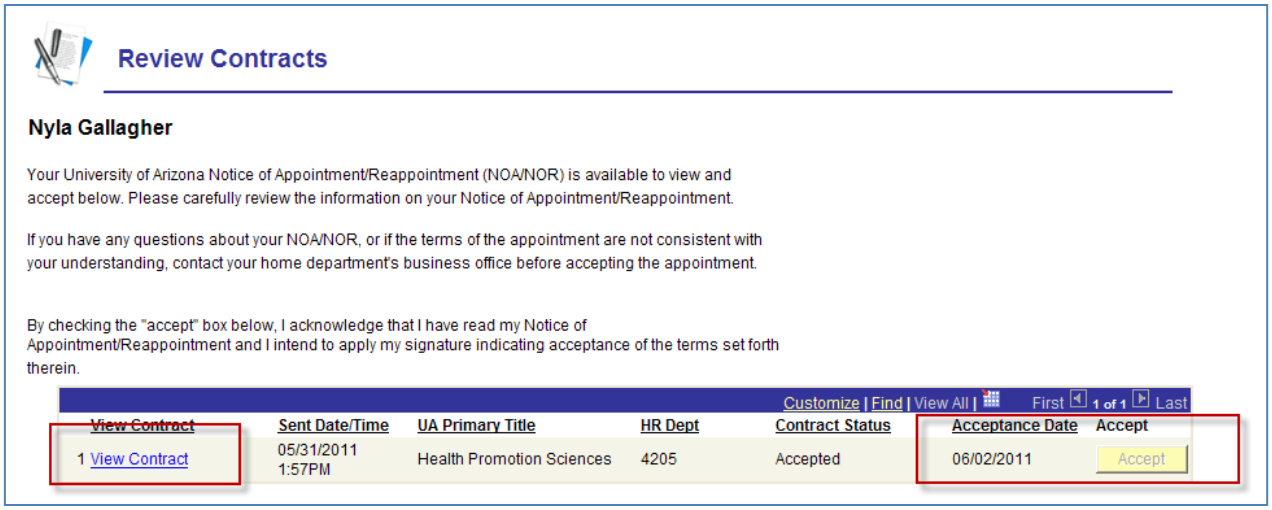
Below is an example of this navigation:



Employees are presented with the following page. Clicking on the "View/Accept Contract" link will open the contract in separate PDF for viewing. Once the contract has been reviewed, the employee simply clicks the ACCEPT button to indicate the contract has been reviewed.



Once the contract has been accepted, the button is no longer available and the link changes to VIEW CONTRACT.   Employees may return here at any point to view the contract they have accepted.



When an employee initially opens up the PDF and has NOT accepted, the signature area indicates an Electronic Signature is Needed. Once the employee accepts, their name and date is added to the PDF. See example below.

I agree to comply with the rules, regulations, and policies of the University of Arizona and the Arizona Board of Regents related to my appointment, including, but not limited to, the intellectual property policies as from time to time amended and the standards of professional conduct referenced in policies of the University.

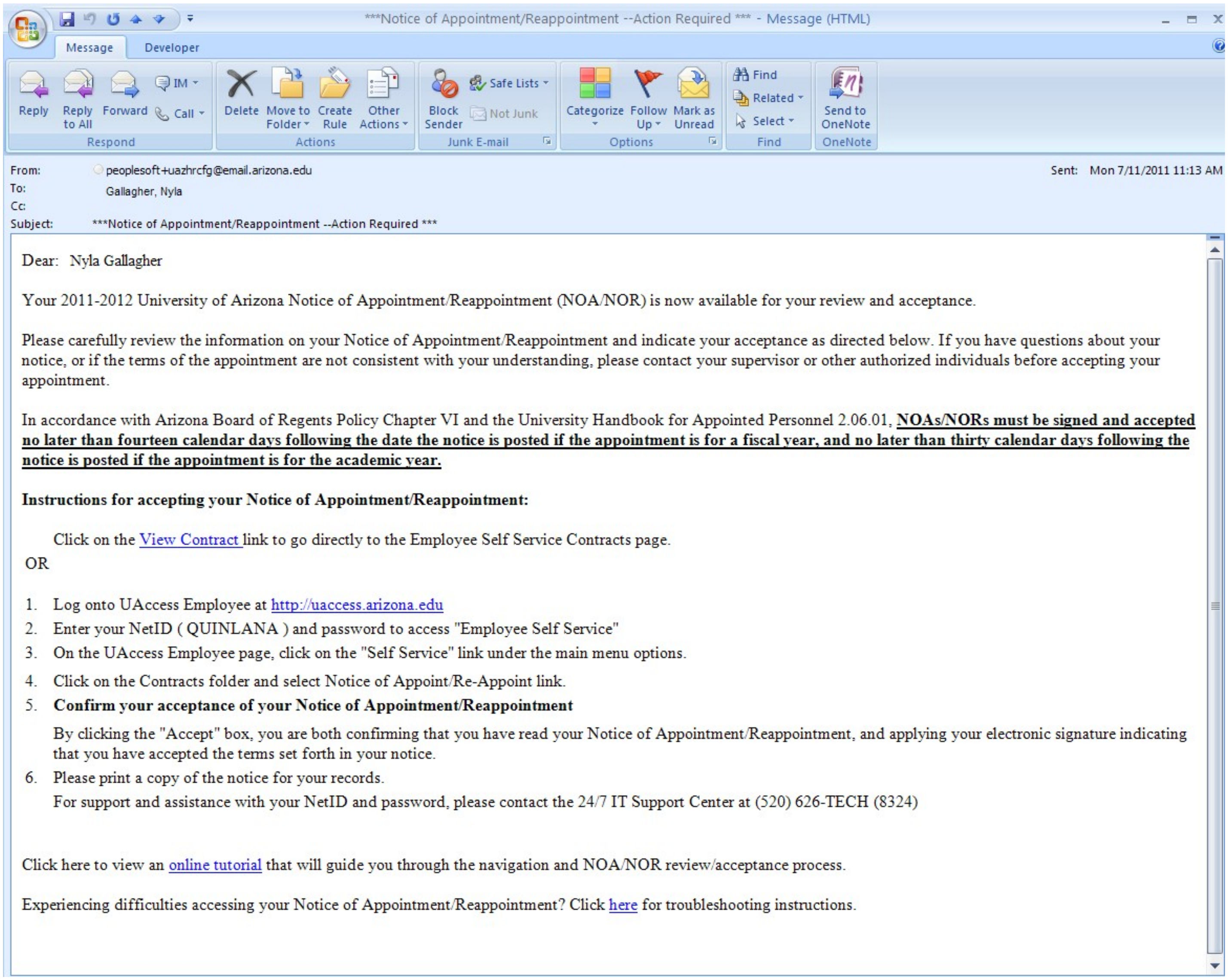
I hereby assign to the Arizona Board of Regents all my right, title and interest to intellectual property created or invented by me in which the Arizona Board of Regents claims an ownership interest under its Intellectual Property Policy (the "ABOR IP Policy"). I agree to promptly disclose such intellectual property as required by the ABOR IP Policy, and to sign all documents and do all things necessary and proper to effect this assignment of rights. I have not agreed (and will not agree) in consulting or other agreements to grant intellectual property rights to any other person or entity that would conflict with this assignment or with the Arizona Board of Regents' ownership interests under the ABOR IP Policy.

Signed __ELECTRONIC SIGNATURE NEEDED____

Please accept this appointment within 14 days (for fiscal appointees) or 30 days (for academic appointees).

SAMPLE EMAIL - EMPLOYEE NOTICE OF APPOINT/RE-APPOINT

The following is an example of the email notification the employee receives to notify them that the NOA/NOR is available for review and acceptance.



***Notice of Appointment/Reappointment --Action Required *** - Message (HTML)

Message Developer

Reply | Reply to All | Forward | IM | Call | Delete | Move to Folder | Create Rule | Other Actions | Block Sender | Safe Lists | Not Junk | Categorize | Follow Up | Mark as Unread | Find | Related | Select | Send to OneNote

Respond | Actions | Junk E-mail | Options | Find | OneNote

From: peoplesoft+uazhrcfg@email.arizona.edu

Sent: Mon 7/11/2011 11:13 AM

To: Gallagher, Nyla

Cc:

Subject: ***Notice of Appointment/Reappointment --Action Required ***

Dear: Nyla Gallagher

Your 2011-2012 University of Arizona Notice of Appointment/Reappointment (NOA/NOR) is now available for your review and acceptance.

Please carefully review the information on your Notice of Appointment/Reappointment and indicate your acceptance as directed below. If you have questions about your notice, or if the terms of the appointment are not consistent with your understanding, please contact your supervisor or other authorized individuals before accepting your appointment.

In accordance with Arizona Board of Regents Policy Chapter VI and the University Handbook for Appointed Personnel 2.06.01, **NOAs/NORs must be signed and accepted no later than fourteen calendar days following the date the notice is posted if the appointment is for a fiscal year, and no later than thirty calendar days following the notice is posted if the appointment is for the academic year.**

Instructions for accepting your Notice of Appointment/Reappointment:

Click on the View Contract link to go directly to the Employee Self Service Contracts page.

OR

1. Log onto UAccess Employee at http://uaccess.arizona.edu
2. Enter your NetID (QUINLANA) and password to access "Employee Self Service"
3. On the UAccess Employee page, click on the "Self Service" link under the main menu options.
4. Click on the Contracts folder and select Notice of Appoint/Re-Appoint link.
5. **Confirm your acceptance of your Notice of Appointment/Reappointment**

   By clicking the "Accept" box, you are both confirming that you have read your Notice of Appointment/Reappointment, and applying your electronic signature indicating that you have accepted the terms set forth in your notice.
6. Please print a copy of the notice for your records.

   For support and assistance with your NetID and password, please contact the 24/7 IT Support Center at (520) 626-TECH (8324)

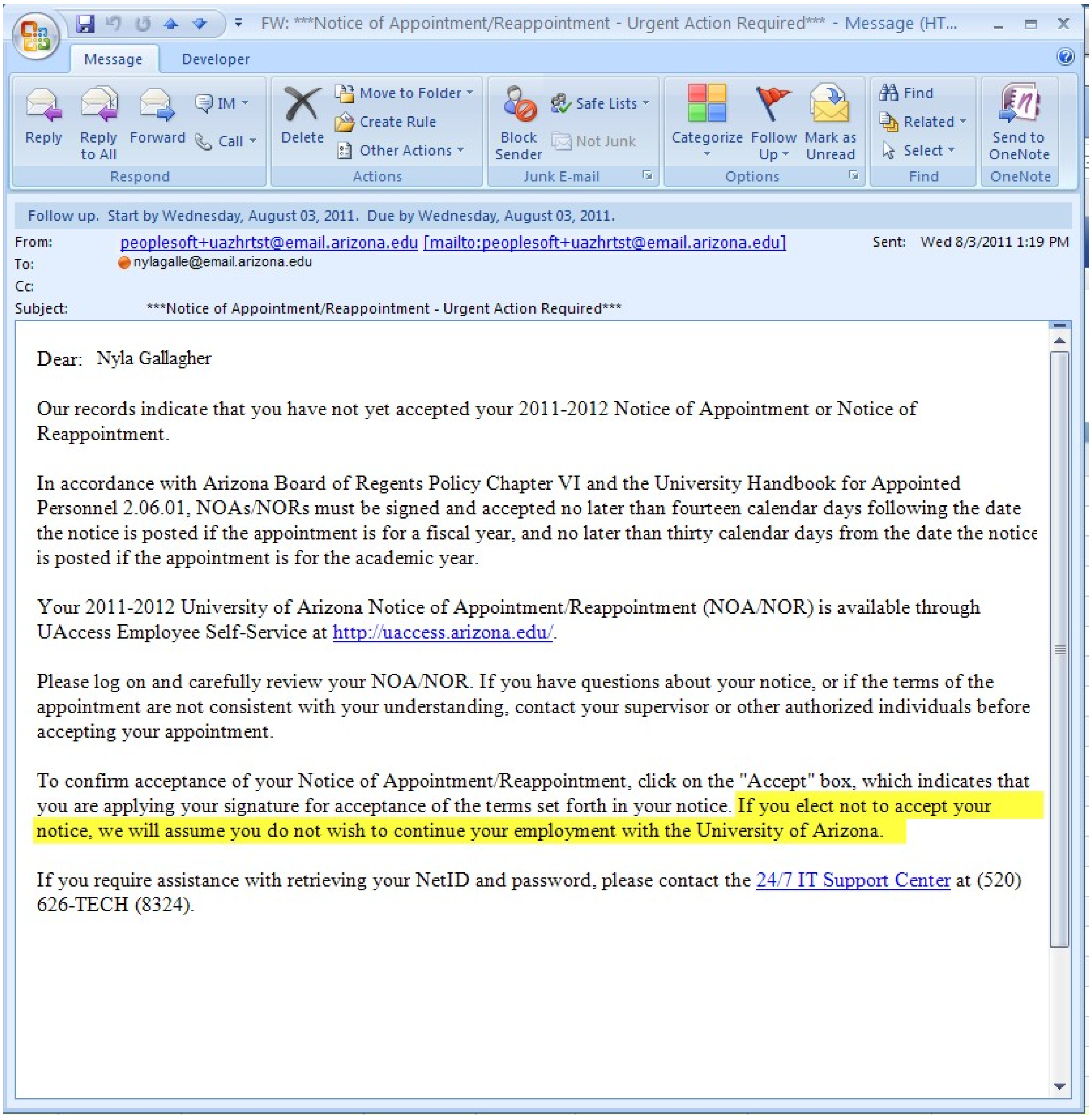
Click here to view an online tutorial that will guide you through the navigation and NOA/NOR review/acceptance process.

Experiencing difficulties accessing your Notice of Appointment/Reappointment? Click here for troubleshooting instructions.

SAMPLE EMAIL – EMPLOYEE 30 DAY NOTICE

The following is an example of the email notification the employees receive to alert them that the NOA/NOR has been waiting for acceptance for over 30 days—the email will be sent on the 31st day from the initial NOA/NOR review/acceptance message.

Please note the section highlighted in the email example. A third email notification is currently being reviewed by Human Resources and the guide will be updated at a future date.



FW: ***Notice of Appointment/Reappointment - Urgent Action Required*** - Message (HT...

Follow up. Start by Wednesday, August 03, 2011. Due by Wednesday, August 03, 2011.

From: peoplesoft+uazhrtst@email.arizona.edu [mailto:peoplesoft+uazhrtst@email.arizona.edu]
Sent: Wed 8/3/2011 1:19 PM
To: nylagalle@email.arizona.edu
Cc:
Subject: ***Notice of Appointment/Reappointment - Urgent Action Required***

Dear: Nyla Gallagher

Our records indicate that you have not yet accepted your 2011-2012 Notice of Appointment or Notice of Reappointment.

In accordance with Arizona Board of Regents Policy Chapter VI and the University Handbook for Appointed Personnel 2.06.01, NOAs/NORs must be signed and accepted no later than fourteen calendar days following the date the notice is posted if the appointment is for a fiscal year, and no later than thirty calendar days from the date the notice is posted if the appointment is for the academic year.

Your 2011-2012 University of Arizona Notice of Appointment/Reappointment (NOA/NOR) is available through UAccess Employee Self-Service at http://uaccess.arizona.edu/.

Please log on and carefully review your NOA/NOR. If you have questions about your notice, or if the terms of the appointment are not consistent with your understanding, contact your supervisor or other authorized individuals before accepting your appointment.

To confirm acceptance of your Notice of Appointment/Reappointment, click on the "Accept" box, which indicates that you are applying your signature for acceptance of the terms set forth in your notice. If you elect not to accept your notice, we will assume you do not wish to continue your employment with the University of Arizona.

If you require assistance with retrieving your NetID and password, please contact the 24/7 IT Support Center at (520) 626-TECH (8324).

PLACING A HOLD ON AN EMPLOYEE OR DEPT

Contract Administrators and College Division Approvers have the ability to place a HOLD on contracts for an individual employee or an entire department. This blocks contracts from being generated and shows as READ ONLY if included in a list for contract generation.

Contract Administrators will exclusive access to contacts the latter part of June to place hold flags on records for the new fiscal year. College Division Approvers will **NOT** be allowed to remove employee or department holds placed by Contract Administrators.

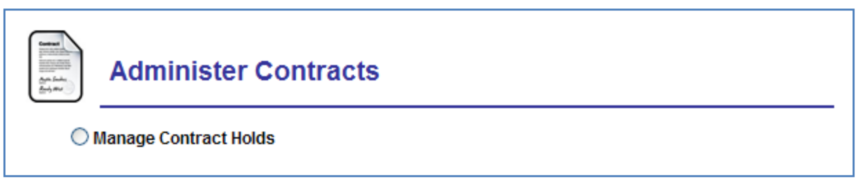
Once the contract process is available to Colleges for the new fiscal year, they will have the ability to place additional hold flags on records.

How to place a hold on an employee contract:

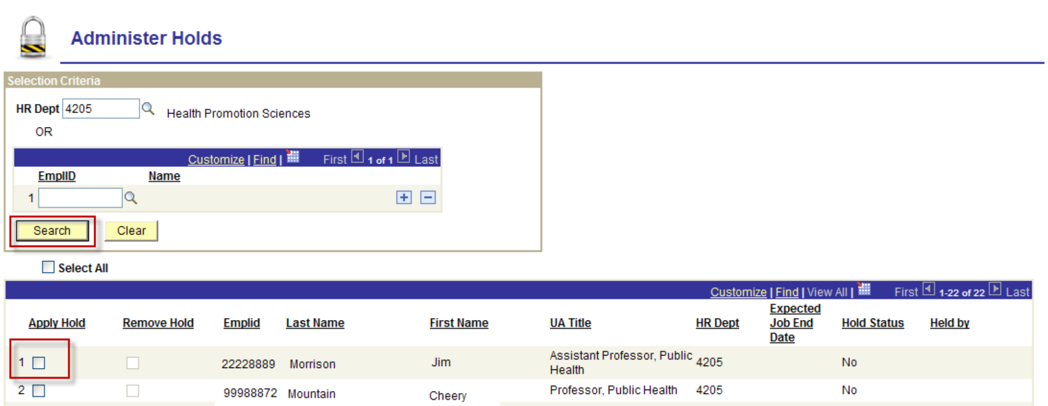
1. Navigate to Manager Self Service > Utilities > Administer Contracts
2. Click on Manage Contract Holds

   Note: Users with college roles may see more options. If a user sees only the radio button below this means they are only a Contract Administrator.

Below is an example of this navigation:



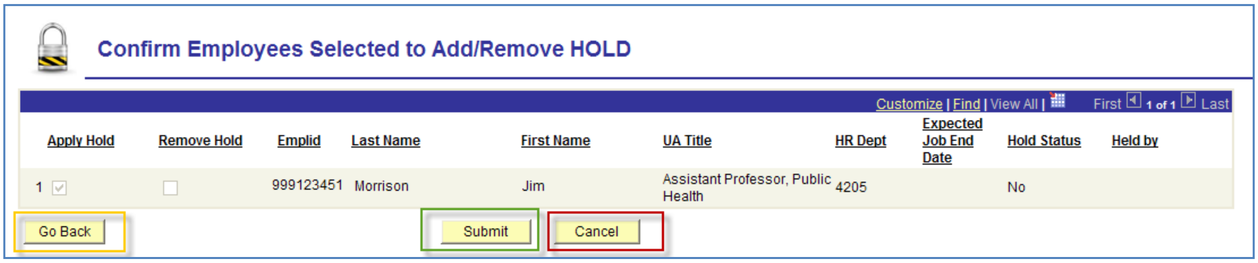
3. **Search for Employees to Place Hold-** Once the criterion has been selected to generate contracts for a list of employees, click the **SEARCH** button to view the results. This search takes a minute or so to gather the information. See the example below.



4. **Select the Employees from your result -** Use the "**Select All**" button to hold contracts for all employees displayed on the list. Users may also select individual employees by clicking the check box. Click the "**Continue**" box when done selecting.

5. **Confirm the Employees Selected** – A read only page will display the list of employees selected for holds. Review the list and click “Submit” to place the hold flag on the employee contract record.

Note: Once “Submit” is selected, the user is directed back to a blank “Administer Holds” page.



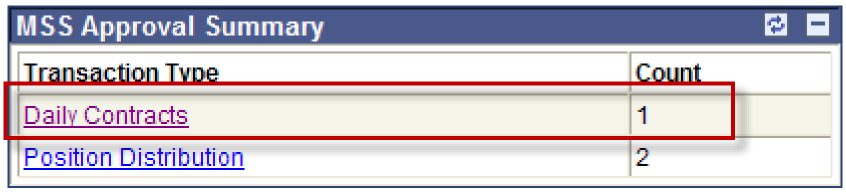
a. Clicking the “Go Back” button takes the user back to the original search results.
b. Clicking the “Cancel” button will take the user the main menu for “Administer Contracts”.

DAILY CONTRACTS

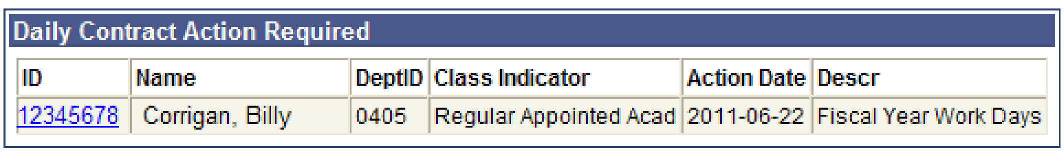
College Division Approvers will receive a new transaction type called "Daily Contracts" in their pagelet. This alerts them to generate a new contract when Job/Title Data is changed for the employee. A specific list of action reasons determines when an employee requires a new contract. The employees will only appear in the pagelet for 10 calendar days. Please see a list of these action reasons and a brief description of the events captured in employee job records that initiate the pagelet.

How to take action on an item listed in your "Daily Contracts" pagelet:

1. Click the link "Daily Contracts"



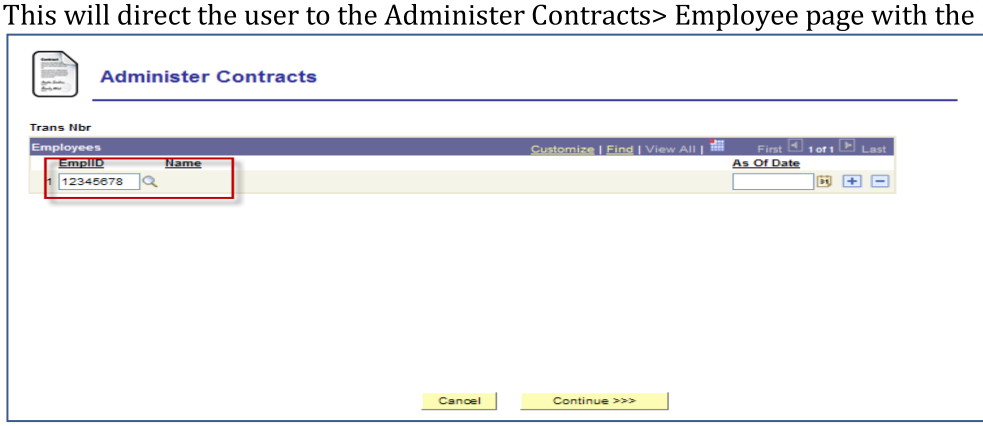
2. A list of one or more employees will appear. Select the EMPLID to take action.



Daily Contract Action Required

ID	Name	DeptID	Class Indicator	Action Date	Descr
12345678	Corrigan, Billy	0405	Regular Appointed Acad	2011-06-22	Fiscal Year Work Days

3. This will direct the user to the Administer Contracts> Employee page with the EMPLID pre-populated.



4. Once the user clicks continue, they will follow the normal process for generating the contract. Please see section College Division Approvers - "HOW TO GENERATE CONTRACTS BY EMPLOYEE" for further details.

Action Reason	Additional Description
Additional Job (Hire)	Start of Additional job and related FTE is added to an existing employee.
Additional Job (ReHire)	Rehire an additional job. (addl employment instance/Empl record)
Additional Title	Adding a title to the current Position with pay increase.
Administrative Stipend	Increase/decrease, Paid to Faculty for administrative duties.
Change Department	Changing/moving a Position to a different Dept Number (same PCN)
Contract Rate Adjustment	An adjustment to a contract (increase/decrease) due to the I-9 form dates.
Correction - Department	Capture a correction to the Department number
Correction - Job Code	Capture a correction to the Job code number
End-Job	End-Additional job instance only; employee will have other active jobs.
Fac Annual Perform Base Compnt	Performance based increase paid as component of pay.
Fiscal Conversion	Component of Pay amount to pay the employee the difference between a contract length change. Example: from Fiscal to Academic.
Fiscal Year Work Days	Change of fiscal work days from 260, 261 and 262.
In Layoff Status (Rehire)	Rehire employee within the 1yr layoff period, on a non-benefit eligible position.
New Hire	Initial hire with the University
New Position	Movement from one department to another; one position to another or one employment type to another.
Other Stipend	Additional amount of money added to Appointed/Faculty.
Position Change	Movement from one department to another; one position to another or one employment type to another.
Position/Title Change (same/diff position#)	Increase in pay due to a change of title; may or may not include change of position number.
Promotion New Dept	A change in job title to a new or established position/dept following a competitive or approved non-competitive process resulting in an increase of one or more pay grades.
Promotion P&T/P&C	Pay Increase; Upwards movement in rank in one of the ladder series for employees designated T, TE, C, CE
Promotion P&T/P&C	Upwards movement in rank in one of the ladder series for employees designated Tenured, Tenured Eligible, Continuing, Continuing Eligible
Promotion within Dept	Upwards movement into a new or established position with additional/higher responsibilities following a competitive or approved non-competitive process.
Reappoint/Extend	Re-appointment/Extension of employment
Rehire	Re-employment with the University
Remove Title	Pay change due to a Removal of an Additional/Secondary job title
Return from Retirement	Rehire employee who had previous Official UA Retirement status.
Temp Assign with Addl Title	Temporary Assignment of Duties with an Additional Title; for non-faculty Appointed Professionals or Faculty with temporary increase in pay.
Temp Assign with Title Chg	Temporary Assignment of Duties with a title change; for non-faculty Appointed Professionals or Faculty with temporary increase in pay.
Title Change (within same position)	Change of Title within the same position number.

Action Reason	Additional Description
Additional Title	Additional Title has been added to employee
Pri/Home Dept Number	Primary/Home Department Number has changed
Remove Additional Title	Remove an Additional Title from employee
Contract Status (Tracking)	Change contract status of employee (Tenured, Tenured Eligible, Continuing, Continuing Eligible)
Title Change	Title has been changed for employee

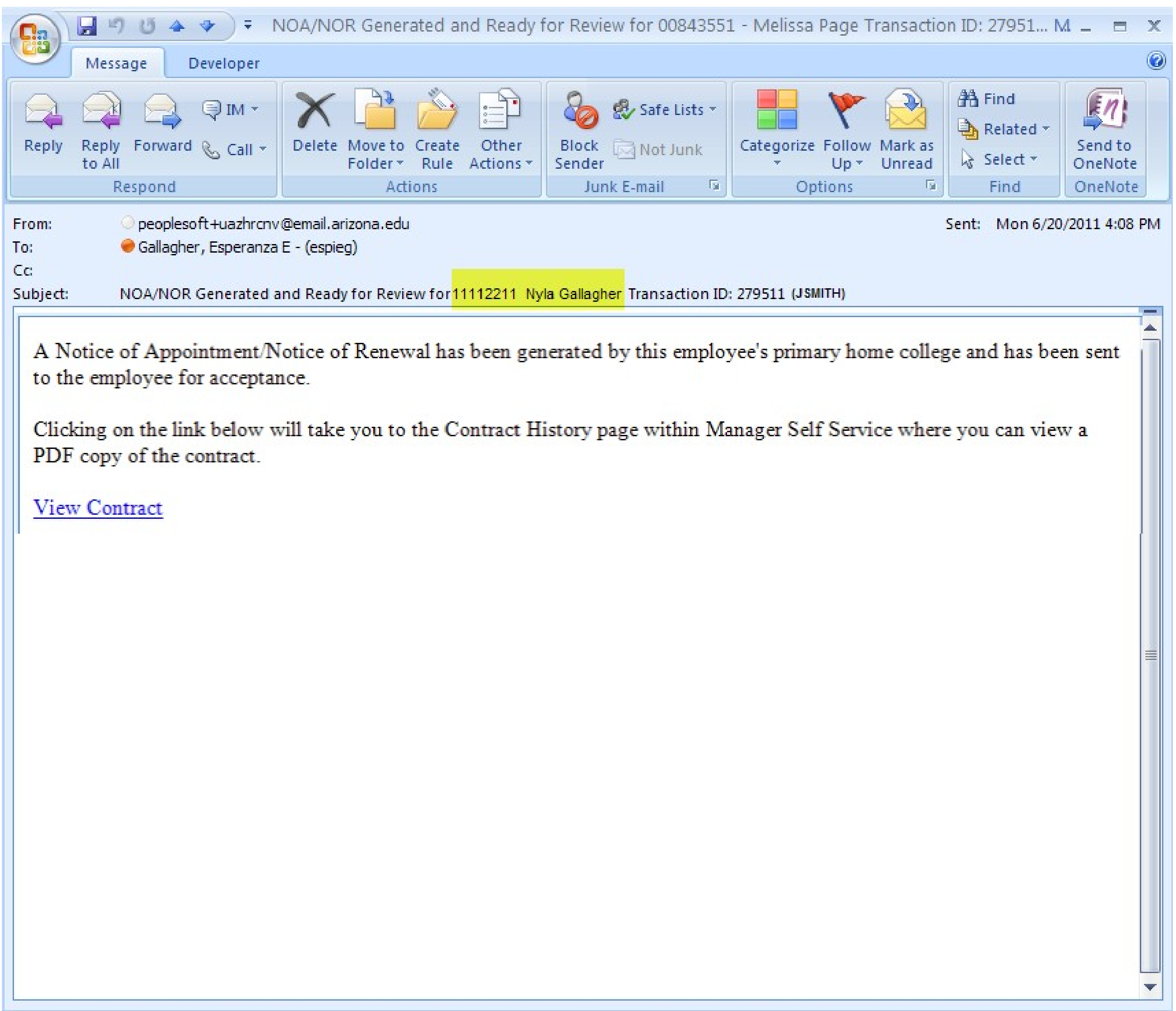
EMAILS SENT TO HR DEPT APPROVERS

HR Department approvers will receive emails from UAccess in the following situations:

1. The College submits the contracts directly to the employee, bypassing existing HR Dept Approvers.
2. The employee has more than one position. The positions that are not primary will receive notices that the contract was sent to the employee.

Situation #1 - If the college has sent the contract directly to employee the following email will be sent to the HR Department Approvers.

- The employees Name and EMPLID will appear in the subject line.
- Clicking on the VIEW CONTRACT link will take the HR Department Approver directly to the Contract History page where they can view the contract sent to the employee.



NOA/NOR Generated and Ready for Review for 00843551 - Melissa Page Transaction ID: 27951... M

From: peoplesoft+uazhrcnv@email.arizona.edu
Sent: Mon 6/20/2011 4:08 PM
To: Gallagher, Esperanza E - (espieg)
Cc:
Subject: NOA/NOR Generated and Ready for Review for 11112211 Nyla Gallagher Transaction ID: 279511 (JSMITH)

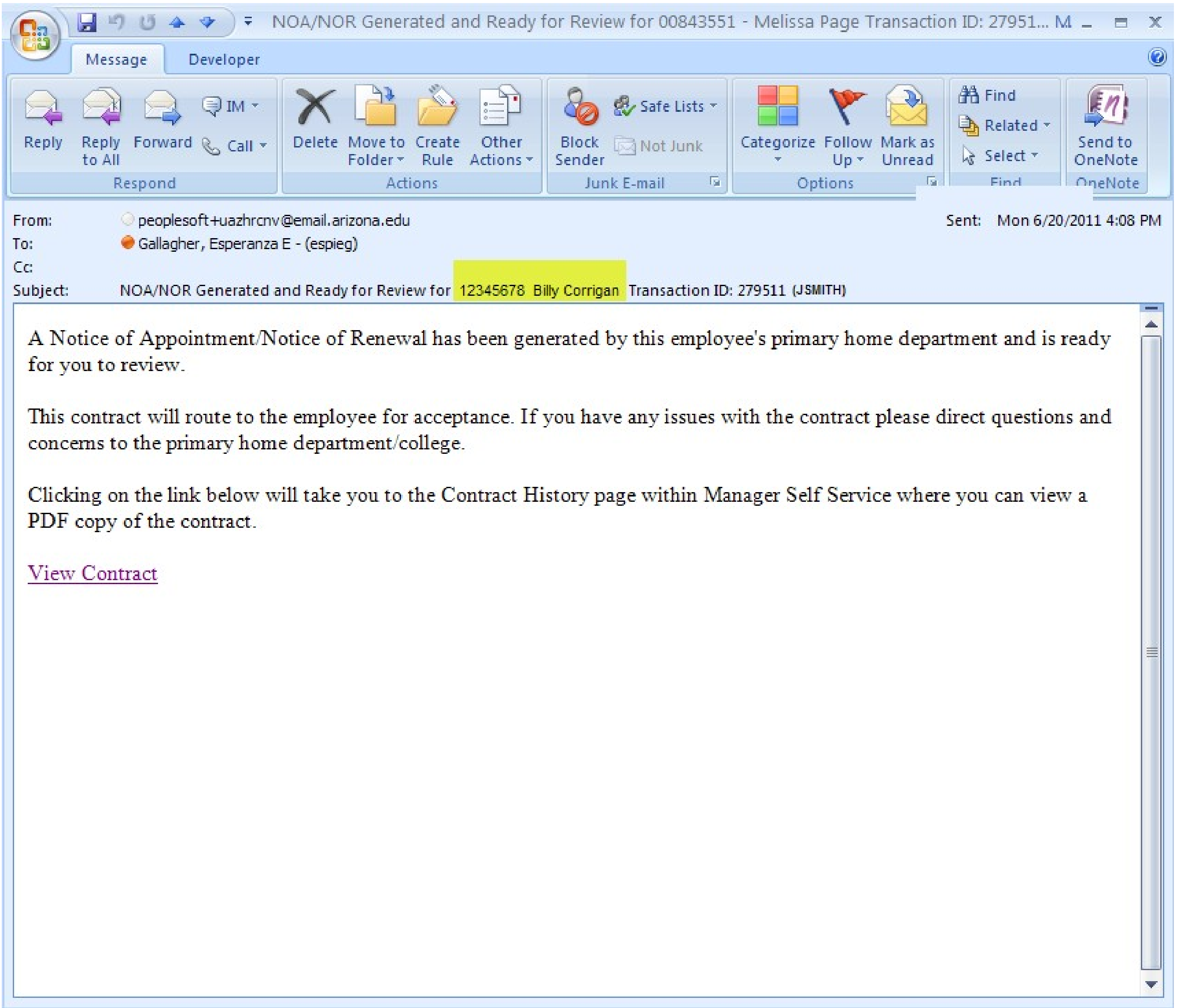
A Notice of Appointment/Notice of Renewal has been generated by this employee's primary home college and has been sent to the employee for acceptance.

Clicking on the link below will take you to the Contract History page within Manager Self Service where you can view a PDF copy of the contract.

View Contract

Situation # 2 - If the primary college has sent the contract to an employee with a position in another department, the secondary department will receive the following email:

- The employees Name and EMPLID will appear in the subject line.
- Clicking on the VIEW CONTRACT link will take the HR Department Approver directly to the Contract History page where they can view the contract sent to the employee.



ERROR/WARNING MESSAGES

The following examples describe the error or warning messages a user may encounter when generating or reviewing contract lists.

YOU CANNOT CONTINUE UNTIL ALL CONTRACTS ARE SET TO 'SEND' OR 'NOT READY'

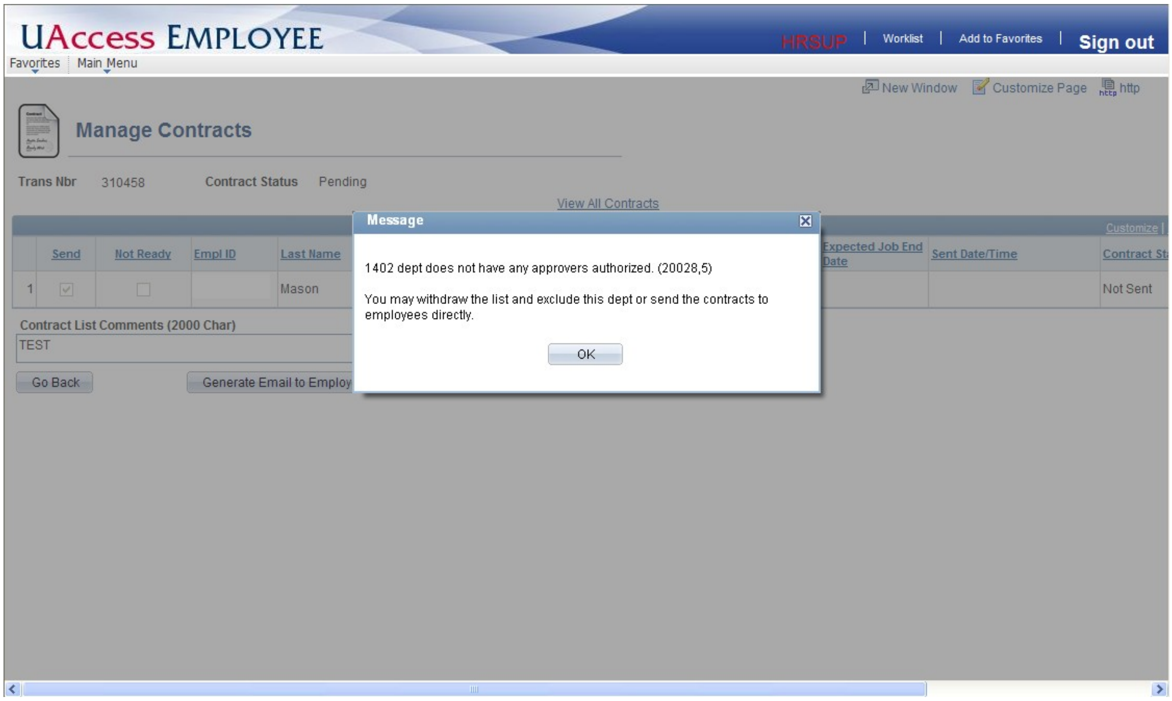
The following error message indicates that either Send or Not Ready has not been selected for an employee in a contract list.

XXXX DEPT DOES NOT HAVE ANY APPROVERS AUTHORIZED (20028,5)

The following error message indicates that there are no HR Department Approvers provisioned for the department for which a college has generated contracts. This prevents a list of contracts from moving to the HR Department Approver step if the role is not filled. The college may withdraw the list or send the contracts to the employee directly.

The college needs to follow up and create an access provisioning request to establish users in the HR Department Approver role for contracts.

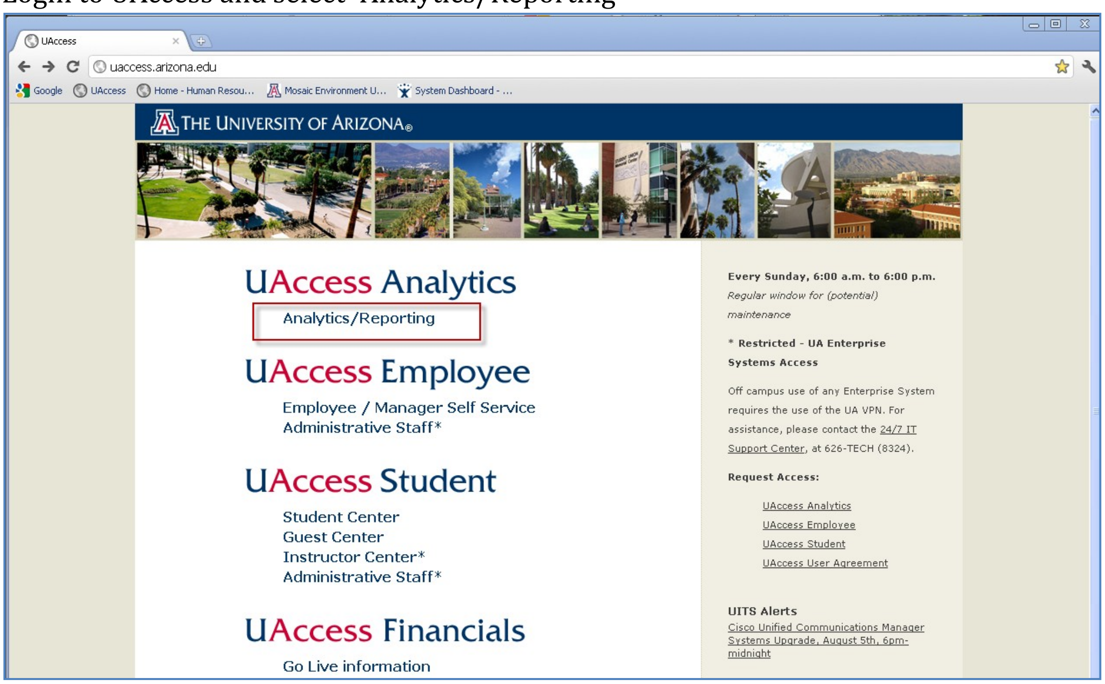
See an example of this error below:



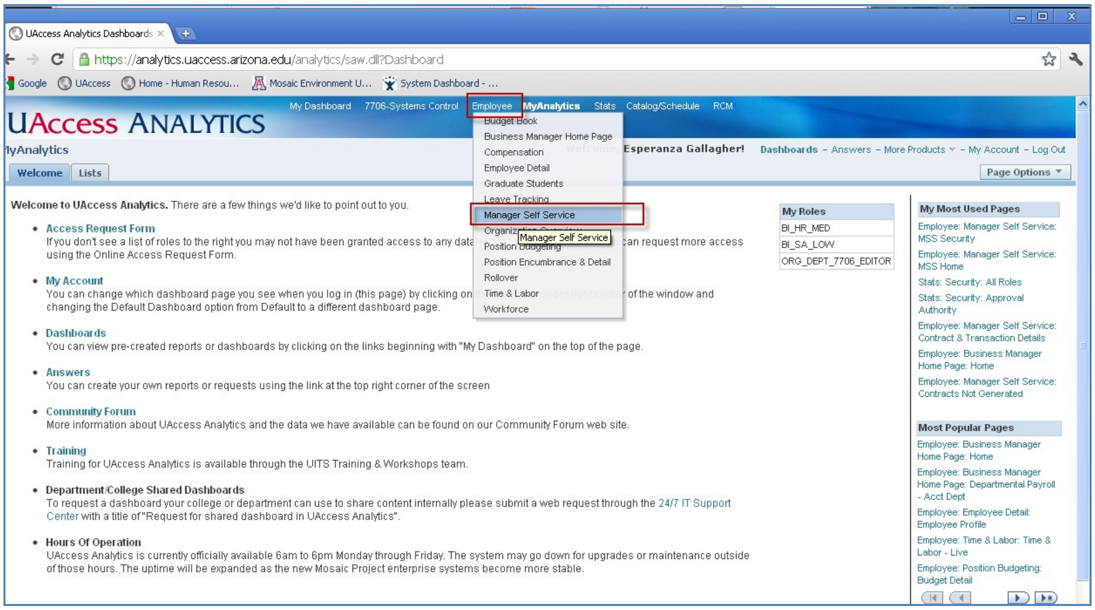
ANALYTIC REPORTS

Additional contract information is available online in Analytic Reports. Please navigate as follows:

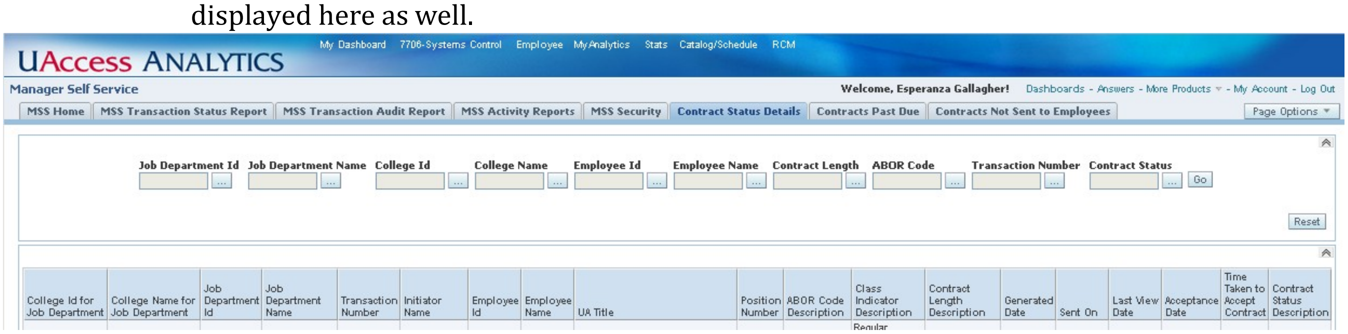
1. Login to UAccess and select "Analytics/Reporting"



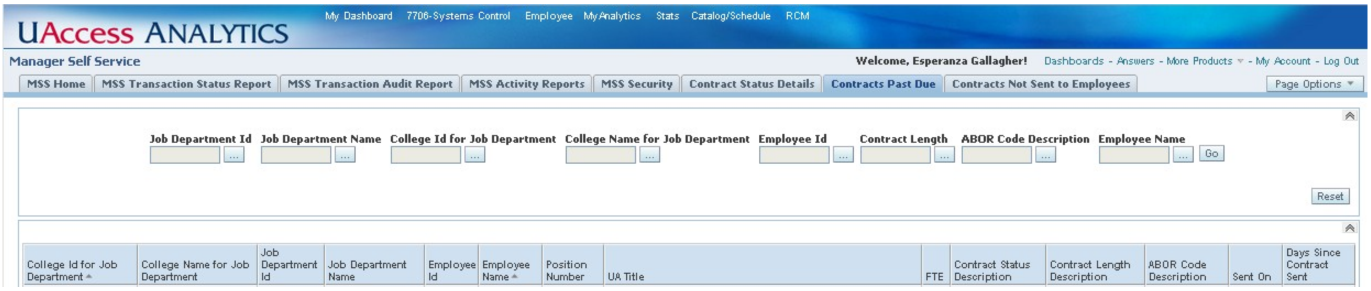
2. Select Employee > Manager Self Service



3. Once the "Manager Self Service" page loads, the following tabs will house information related to Contracts.
   a. **Contract Status Details**
      i. Is a replica of the Contract History Page information within Manager SelfService.
      ii. Additionally, information such as Acceptance Date and Time Taken to Accept Contract are displayed here as well.

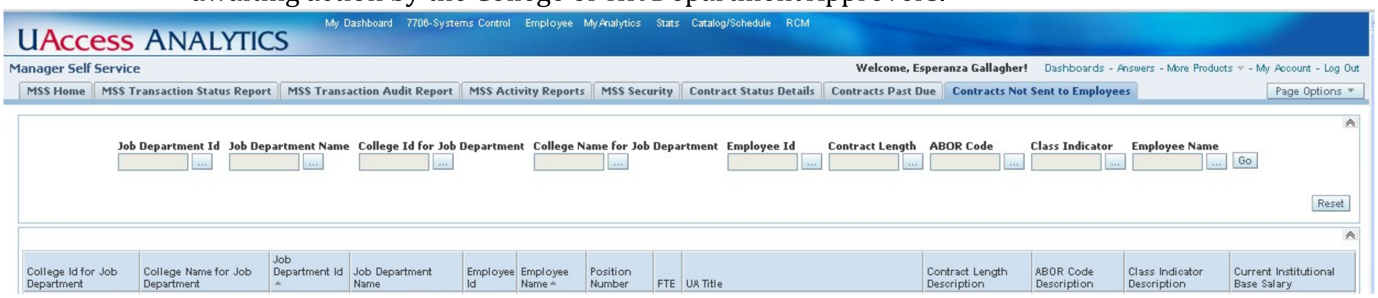


   b. **Contracts Past Due**
      i. Employees will appear on this report if they have received a contract in Employee Self Service and the contract status is set to "waiting for acceptance."
      ii. Users will be able to see the day and the number of days since the employee contract was sent to Employee Self Service.
      iii. Employees do not appear on this list until after the 13th day for Fiscal and 29th day for Academic Contract Lengths.



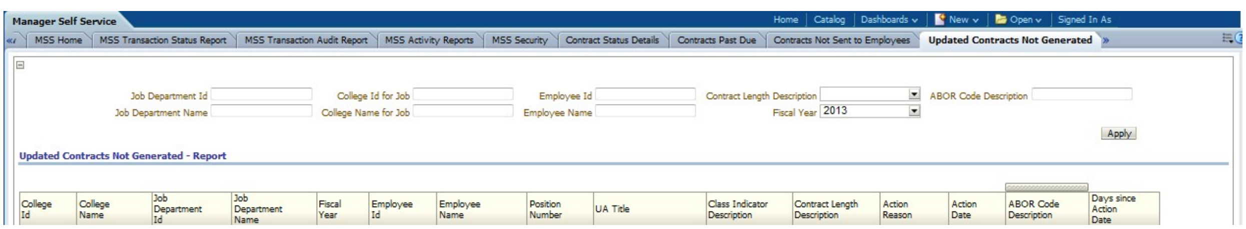
c. **Contracts Not Sent to Employees**

i. Employees on this list have not received a contract in Employee Self Service for the current fiscal year. Contracts for employees listed have not been generated by the College or are awaiting action by the College or HR Department Approvers.



d. **Updated Contracts Not Generated**

i. Employees on this list have not received Employee Self Service NOAs/NORs for either the fiscal year or changes to job data that require new contracts. Contracts for employees listed have not been generated by the College or are awaiting action by the College or HR Department Approvers.



CONTACT INFORMATION

If you are experiencing problems or just have questions about the Manager Self Service Contract Administration, please contact Workforce Systems at workforcesystems@email.arizona.edu or 520-621-3664.