

How to Correct Faculty Appointments in FHS DB (HR)

Target Audience: Human Resources/Faculty Relations

Updated April 27, 2023

OVERVIEW

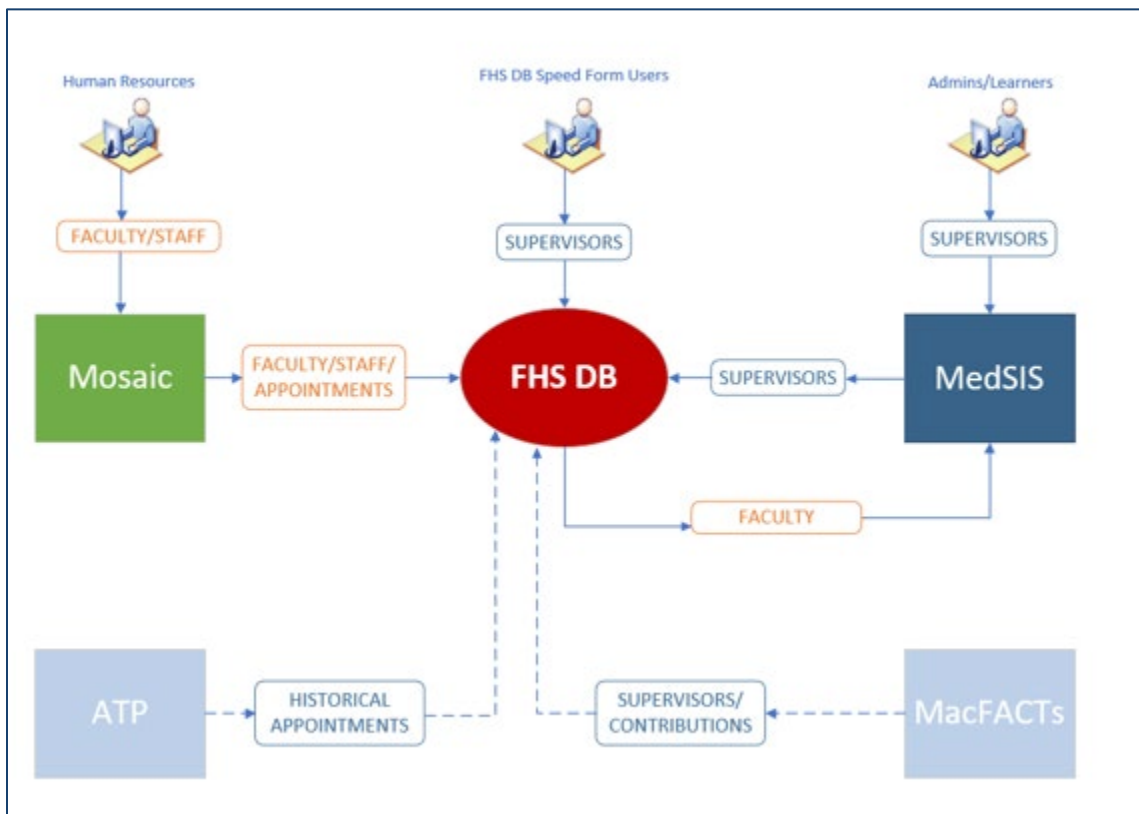
This document outlines how to view academic appointments for faculty members in Faculty of Health Sciences. Some information in FHS DB will be read-only as it is coming either from Mosaic or MedSIS. Other information can be updated based on your security permissions.

We had created a Faculty Relations role that will allow any user that is assigned to this role to view all appointments as well as edit any historical appointments whether they came from ATP or Mosaic.

MOSAIC IMPORT

Right now, we process academic appointment coming from Mosaic on monthly basis. Our goal is to progress to a **nightly routine** that would pull all active appointments from Mosaic to FHS DB.

We only bring in active appointments. So if appointment lapses or faculty retire or leave, the appointment line drops from the import file and the record in FHS DB will be flagged with Details Missing warning. This means that the record must be adjusted in FHS DB manually with the end date.



LOGIN TO FHS-DB

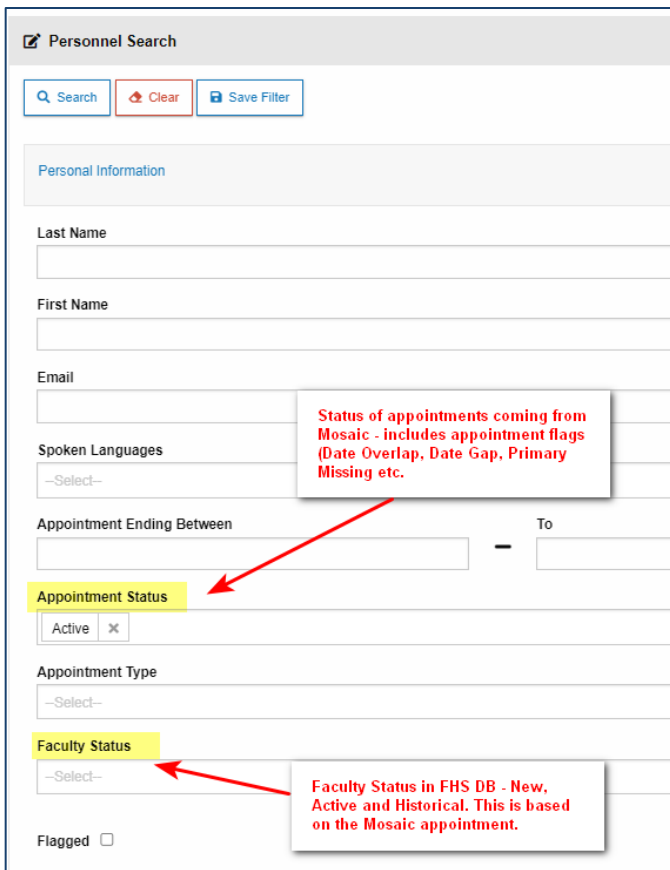
Login to the system using your MacID/password or local login.

If you have any questions about how to login, refer to this user guide on our website [How to Login to FHS DB](#)

PERSONNEL SEARCH

The Personnel Search will allow users to search for a list of faculty based on some search criteria. You can search by rank, department, appointment end date range (to see who has an appointment ending soon) as well as other criteria.

APPOINTMENT STATUS VS FACULTY STATUS



The screenshot shows the Personnel Search form with the following fields and callouts:

- Appointment Status:** A callout box explains: "Status of appointments coming from Mosaic - includes appointment flags (Date Overlap, Date Gap, Primary Missing etc.)." A red arrow points from this callout to the Appointment Status dropdown menu.
- Faculty Status:** A callout box explains: "Faculty Status in FHS DB - New, Active and Historical. This is based on the Mosaic appointment." A red arrow points from this callout to the Faculty Status dropdown menu.

APPOINTMENT STATUS is a status of the imported appointment line once it is processed in FHS DB. The import functionality involves series of validation processes that verify the existing appointments in comparison to the new ones coming from Mosaic. There can be some appointment errors (missing end dates, overlapping appointment etc.) that are flagged using the Appointment Status. These can be validated and fixed in Mosaic and subsequently in FHS DB.

This Appointment Status filter will allow you to view the exception and errors in appointments being flagged from the Mosaic Import. If you would like to see only Active records, filter on Active here.

FACULTY STATUS is used to determine the status of faculty members in FHS DB. This will be mostly used by department to determine what new faculty had been added to Mosaic. Eventually we will tie Alerts and Notifications to this status to alert the departments of new faculty.

There are 4 statuses:

1. **Draft** – any new faculty added to Mosaic where the Start Date is in the future.
2. **New** – any new faculty added to Mosaic where the Start Date is in the past.
3. **Active** – faculty with active appointment.
4. **Historical** – faculty with no active appointments.

The system should bring anyone **New** from Mosaic and allow the departments to view the appointments and add any information needed. Then the status should be changed to **Active** (manual switch). If the appointment lapses or is terminated, the system will automatically change the status (overnight process) to **Historical**.

APPOINTMENT STATUS

There are various flags that are set every time a new appointment import from Mosaic is run. The process checks all appointments being imported against the existing ones in FHS DB. If there are any discrepancies, a flag is set in the Appointment Status field. You can filter on all flags by selecting the statuses in the Appointment Status field.

Appointment Status	What it means?
Active	Active appointment. No issues.
Date Gap	There is a gap between 2 appointments. If legitimate time between, exception can be set by overwriting the flag.
Date Missing	There are 2 concurrent appointments both with missing end dates. Most of the time, one of the appointments should be ended in Mosaic.
Date Overlap	There are 2 or more concurrent appointments overlapping with dates. These should be corrected in Mosaic and FHS-DB (if appointment in the past)
Detail Missing	When appointments end in Mosaic, they do not come in the Mosaic Import anymore. This results in flagging the existing appointment in FHS DB with this flag to alert us to end the previous appointment in FHS DB.
Ignore	This flag was used to ignore certain appointments coming from Mosaic and it is not currently used.
Inactive	All appointments that end will switch to Inactive
New	This flag is set for any appointments that are brand new (new faculty)
Primary Missing	McMaster faculty can have a primary appointment outside of FHS, and secondary appointment with FHS. We need to set these as exceptions in the FHS DB appointment field.

The highlighted statuses above have an action item associated with them that needs to be resolved by either HR or with HR's help. Sometimes, they need to be edited in Mosaic, other times in FHS DB and in rare cases in both systems.

If an appointment being corrected in Mosaic is still active, then the change will correct itself in FHS DB on the next import. If an appointment being corrected is in the past, they it must be changed in Mosaic AND in FHS DB as well.

There are 2 ways to view the flagged records – in the **Imported Staff Appointment** screen or directly in the **Personnel Information** menu for Academic Appointments.

NOTE: Date Gaps and Primary Appointments Missing can only be corrected in the Imported Staff Appointment screen as this is the only place where you can set the exception flags.

FLAGS THAT CAN BE RESOLVED IN EMPLOYMENT HISTORY

Date Missing

Sometime there are 2 appointments with no end dates. Since we can only have 1 active primary appointment at a time, we need to correct this in Mosaic and/or FHS DB. Search for any Date Missing appointments by selecting the Date Missing as the Appointment Status in the Personnel Screen and click Search.

Email	CFPC
Spoken Languages	Department
Appointment Ending Between	Divisions
Appointment Status	Rank
Date Missing	

Select one or more faculty and view their profile. Navigate to the Employment Details menu and review the flagged records.

1 of 482

Rank: Lecturer (Adjunct) CPSO/Other ID: Teaching Location: McMaster Building/Office:
 Department: School of Nursing Primary Email: Division:

Department Information

Employee ID: Union Code: OTA Employee Class: OTA

Academic Appointments Teaching Location Program Roles Sabbatical Eligibility Flag Employment History

Showing 1 to 3 of 3 entries

Employee Number	Department	Rank	Type	Rank Type	Full / Part	Employee Class	Union	Division	Start Date	End Date	Source	Status
001028793	School of Nursing	Lecturer (Adjunct)	Primary	Faculty	Part-Time	Other Academic	Other Academic		2019-06-01	2022-06-30	Mosaic	Inactive (Inactive)
001028793	School of Nursing	Assistant Professor	Primary	Faculty	Full-Time				2008-07-01		ATP	Active (Date Missing)
001028793	School of Nursing	Lecturer	Primary	Faculty	Full-Time				2005-07-01	2008-06-30	ATP	Inactive (Inactive)

Show 25 entries

The record in ATP was not terminated so now it overlaps with the Mosaic record

Correct the record by editing it and adding the proper end date.

Date Overlap

Sometime there are 2 appointments that are overlapping. Since we can only have 1 active primary appointment at a time, we need to correct this in Mosaic and/or FHS DB. Search for any Date Overlap appointments by selecting the Date Overlap as the Appointment Status in the Personnel Screen and click Search.

Spoken Languages	Department
Appointment Ending Between	Divisions
Appointment Status	Rank
Date Overlap	

Select one or more faculty and view their profile. Navigate to the Employment Details menu and review the flagged records.

HOME / EMPLOYMENT DETAILS

1 of 477 Active

Rank: Assistant Professor CPISO/Other ID: Teaching Location: McMaster Building/Office:
 Department: Anesthesiology Primary Email:
 Division:

Department Information

Employee ID: Union Code: CFA Employee Class: SCL

Academic Appointments Teaching Location Program Roles Sabbatical Eligibility Flag Employment History

Showing 1 to 2 of 2 entries

Employee Number	Department	Rank	Type	Rank Type	Full / Part	Employee Class	Union	Division	Start Date	End Date	Source	Status
200010740	Anesthesiology	Assistant Professor	Primary	Faculty	Full-Time	Special	Clinical Faculty		2022-05-31	2025-06-30	Mosaic	Active (Active)
200010740	Anesthesiology	Assistant Clinical Professor	Primary	Faculty	Part-Time	Other Academic	Other Academic		2021-09-01	2024-06-30	Mosaic	Active (Date Overlap)

Show 25 entries

2 overlapping PRIMARY appointments

Navigate to the next faculty to view more flagged records.

FLAGS THAT HAVE TO BE RESOLVED IN IMPORTED STAFF APPOINTMENTS

There are 3 flags (issues) that must be resolved in the Imported Staff Appointments screen. Here is where the exception to the rules will be applied.

Navigate to the Imported Staff Appointments screen and filter on Data Gap, Details Missing and Primary Missing flags.

HOME / MOSAIC STAFF APPOINTMENTS

Status: --Select-- Staff Member: Source: --Select--

You can filter by Staff Member, Source (Mosaic, ATP)

Showing 1 to 25 of 12,863 entries

Name	Employee Number	Mac Id	Department	Rank	Type	Rank Type	Full / Part	Division	Starting	Ending	Source	Status
400227122, DUPLICATE ID # SEE	200005730	DKHALAF	Oncology	Assistant Professor	Primary	Faculty	Full-Time		2018-05-01	2021-06-30	Mosaic	Inactive
Abadir, Anna	000463859	ABADIRAM	Psychiatry	Asst Clinical Prof (Adjunct)	Primary	Faculty	Part-Time		2021-01-01	2024-06-30	Mosaic	Active
Abbas, Minan	200009212	ABBASM42	Medicine	Assistant Professor	Primary	Faculty	Full-Time		2021-07-01	2024-06-30	Mosaic	Active
Abbas, Minan	200009212	ABBASM42	Medicine	Clinical Scholar	Primary	Faculty	Full-Time		2020-07-01	2021-06-30	Mosaic	Inactive

This screen shows all appointments brought over from Mosaic or ATP. The system groups them into a summary record based on the rank. To view the details, you need to drill down by clicking the edit button.

Edit Appointment Summary

Name: [Redacted] Department: School of Nursing Rank: Lecturer (Adjunct)
 Type: Primary Rank Type: Faculty Full / Part: Part-Time
 Start: 2019-08-01 End: 2022-06-30 Status: Inactive
 Division: [Dropdown] External Primary Appointment Allow Date Gap

This screen shows the appointments related to the one in the summary. Here you can edit the end dates of active mosaic appointments as well as set the exceptions for allowing Date Gaps and External Primary Appointments.

Showing 1 to 1 of 1 entries

ID	Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source	Source ID
	[Redacted]	School of Nursing	Lecturer (Adjunct)	Faculty	Part-Time	2019-08-01	2022-06-30	Inactive	Mosaic	59523

Showing 1 to 2 of 2 entries

Other Primary Appointments

Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source
[Redacted]	School of Nursing	Assistant Professor	Faculty	Full-Time	2008-07-01		Date Missing	ATP
[Redacted]	School of Nursing	Lecturer	Faculty	Full-Time	2005-07-01	2008-06-30	Inactive	ATP

Details Missing

Since we are only bringing in active appointments from Mosaic, every time that an appointment is ended (retirement, termination, end date) in Mosaic, the record is dropped from our import. The system will know this and mark the existing record in FHS DB with a Details Missing flag. The only way to resolve this is to update the end date of that appointment in FHS DB.

1 of 105 [Navigation] Active

Rank: Assistant Professor (PT) CPSO/Other ID: [Redacted] Teaching Location: McMaster Building/Office:
 Department: Family Medicine Primary Email: [Redacted] McMaster Building/Office:
 Division: [Redacted]

Department Information

Employee ID: [Redacted] Union Code: OTA Employee Class: OTA

Academic Appointments Teaching Location Program Roles Sabbatical Eligibility Flag Employment History

Showing 1 to 2 of 2 entries

Employee Number	Department	Rank	Type	Rank Type	Full / Part	Employee Class	Union	Division	Start Date	End Date	Source	Status
200000752	Family Medicine	Assistant Professor (PT)	Primary	Faculty	Part-Time	Other Academic	Other Academic		2020-03-01	2023-06-30	Mosaic	Active (Detail Missing)
200000752	Family Medicine	Assistant Clinical Professor	Primary	Faculty	Part-Time				2013-02-01	2020-02-29	ATP	Inactive (Inactive)

This appointment was no longer in the Mosaic import file so it needs to be corrected here.

To fix this record, you need to go to the **Imported Staff Appointments**. Here filter on Detail Missing and search for your faculty. Click the edit button and adjust the end date. You will be forced to leave a comment so we can have an audit trail of adjusted active appointments.

Edit Appointment Summary

Name: [Redacted] Department: Family Medicine Rank: Assistant Professor (PT)
 Type: Primary Rank Type: Faculty Full / Part: Part-Time
 Start: 2020-03-01 End: 2023-06-30 Status: Detail Missing
 Division: [Dropdown] External Primary Appointment: Allow Date Gap:

Showing 1 to 1 of 1 entries

ID	Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source	Source ID
71576	[Redacted]	Family Medicine	Assistant Professor (PT)	Faculty	Part-Time	2020-03-01	2023-06-30	Active	Mosaic	71533

Showing 1 to 1 of 1 entries

Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source	Source ID
[Redacted]	Family Medicine	Assistant Clinical Professor	Faculty	Part-Time	2013-02-01	2020-02-29	Inactive		

Adjust the end date and click Save.

Date Gap

Date gap is flagged anytime there is gap between appointments. These flags must be either acknowledged as an exception in FHS DB or fixed in Mosaic.

To search for any Date Gaps appointments, you have 2 options:

OPTION 1 – Correct it in Employment Details

- Select Date Gap as the Appointment Status in the Personnel Search and select all faculty with the Data Gap

Spoken Languages --Select--	Department --Select--
Appointment Ending Between [] - To []	Divisions --Select--
Appointment Status Date Gap ✕	Rank --Select--
Appointment Type --Select--	Teaching Role --Select--
Faculty Status --Select--	Primary Teaching Locations --Select--

- Navigate to the Employment Details menu to view the flagged records.

1 of 410

Active

Rank: Asst Clinical Prof (Adjunct) CPSO/Other ID: Teaching Location: McMaster Building/Office:
 Department: Medicine Primary Email: Division:

Department Information

Employee ID: Union Code: OTA Employee Class: OTA

Academic Appointments Teaching Location Program Roles Sabbatical Eligibility Flag Employment History

Showing 1 to 4 of 4 entries

Employee Number	Department	Rank	Type	Rank Type	Full / Part	Employee Class	Union	Division	Start Date	End Date	Source	Status
006033651	Medicine	Asst Clinical Prof (Adjunct)	Primary	Faculty	Part-Time	Other Academic	Other Academic		2021-07-01	2024-06-30	Mosaic	Active (Active)
006033651	Medicine	Asst Clinical Prof (Adjunct)	Primary	Faculty	Part-Time	Other Academic	Other Academic		2018-07-01	2021-06-30	ATP	Inactive (Active)
006033651	Medicine	Asst Clinical Prof (Adjunct)	Primary	Faculty	Part-Time	Other Academic	Other Academic		2015-11-01	2018-06-30	ATP	Inactive (Active)
006033651	Medicine	Clinical Scholar	Primary	Faculty	Full-Time				2014-07-01	2015-06-30	ATP	Inactive (Date Gap)

Show 25 entries

Date gap between appointments

If this is a legitimate gap between appointment, you need to correct this in the **Imported Staff Appointments** window where you can acknowledge this gap – go to Option 2.

If this is a mistake and the gap needs to be closed by adjusting the start date or the end date, click on the edit button of the record to be adjusted and edit the date. The flag will be reset.

OPTION 2 – Correct it in Imported Staff Appointments

System Administration

Peoplesoft Import

Imported Staff Appointments

Personnel Info

Showing 1 to 25 of 350 entries

Name	Employee Number	Mac Id	Department	Rank	Type	Rank Type	Full / Part	Division	Starting	Ending	Source	Status
Abdelshaheed, Rami	006033651	ABDELSR	Medicine	Clinical Scholar	Primary	Faculty	Full-Time		2014-07-01	2015-06-30	ATP	Date Gap
Abdul Wahab, Muzafar Gani	006016787	ABDULWAG	Pediatrics	Assistant Professor	Primary	Faculty	Full-Time		2013-01-01	2018-06-30	ATP	Date Gap
Adelroth, Ellinor	001021693		Medicine	Assistant Professor	Primary	Faculty	Full-Time		1991-09-01	1993-08-31	ATP	Date Gap

- Go to your System Administration menu → Peoplesoft Import → Imported Staff Appointments
- Filter on Date Gap
- Click Edit to set the exception for Date Gap or to correct the gap by adjusting the appointment dates

Edit Appointment Summary

Name: Abdelshaheed, Rami | Department: Medicine | Rank: Clinical Scholar

Type: Primary | Rank Type: Faculty | Full / Part: Full-Time

Start: 2014-07-01 | End: 2015-06-30 | Status: Date Gap

Division: [Dropdown] | External Primary Appointment: | Allow Date Gap:

Showing 1 to 1 of 1 entries

ID	Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source	Source ID
114583	006033651	Medicine	Clinical Scholar	Faculty	Full-Time	2014-07-01	2015-06-30	Inactive	ATP	16262

Showing 1 to 1 of 1 entries

Other Primary Appointments

Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source
006033651	Medicine	Asst Clinical Prof (Adjunct)	Faculty	Part-Time	2015-11-01	2024-06-30	Active	Mosaic/ATP

Primary Missing

Faculty must have 1 primary appointment and can have 1 or more secondary appointments Based on these rules, we flag all faculty that do not have a primary appointment in FHS. Since we only bring in FHS appointments through the Mosaic import, we do not have their primary appointments in other faculties. Each flagged record must be acknowledged in the **Imported Staff Appointments Screen**.

Search for Primary Missing status and click edit for the faculty you are trying to adjust.

Status: **Primary Missing** | Staff Member: [Dropdown] | Source: --Select--

Showing 1 to 25 of 37 entries

Name	Employee Number	Mac Id	Department	Rank	Type	Rank Type	Full / Part	Division	Starting	Ending	Source	Status
Anglin, Rebecca		ANGLINR	Medicine	Joint Appointment	Secondary	Faculty	Full-Time		2010-07-01	2017-03-31	ATP	Primary Missing
Bayley, Stanley Thomas			Biochemistry	Associate Member	Secondary	Faculty	Full-Time		1992-07-01		ATP	Primary Missing
Bell, Russell Arthur			Biochemistry	Joint Appointment	Secondary	Faculty	Full-Time		1996-07-01	2017-10-04	ATP	Primary Missing
Blimkie, Cameron Joseph R			Pediatrics	Associate Member	Secondary	Faculty	Full-Time		1985-11-01		ATP	Primary Missing

If you can confirm that the faculty does have a primary appointment outside of FHS, select the External Primary Appointment check and click Save.

Edit Appointment Summary

Name: [Redacted] Department: Medicine Rank: Joint Appointment

Type: Secondary Rank Type: Faculty Full / Part: Full-Time

Start: 2010-07-01 End: 2017-03-31 Status: Primary Missing

Division: [Dropdown] External Primary Appointment Allow Date Gap

Select External Primary Appointment Check

Showing 1 to 4 of 4 entries

ID	Employee Number	Department	Rank	Rank Type	Full / Part	Start	End	Status	Source	Source ID
113324	[Redacted]	Medicine	Joint Appointment	Faculty	Full-Time	2016-07-01	2017-03-31	Inactive	ATP	13880
113322	[Redacted]	Medicine	Joint Appointment	Faculty	Full-Time	2012-03-26	2016-06-30	Inactive	ATP	13879
113320	[Redacted]	Medicine	Joint Appointment	Faculty	Full-Time	2011-07-01	2012-03-25	Inactive	ATP	13882
113318	[Redacted]	Medicine	Joint Appointment	Faculty	Full-Time	2010-07-01	2011-06-30	Inactive	ATP	13881

EXPORTING FACULTY INFORMATION

You can print your faculty information using the Export functionality on the Search Screen result window.

FHSDB McMaster


Search Query: Appointment Status: Active Department: Obstetrics and Gynecology

Personnel Search Results Total: 228

Export Copy Email View Profile

Last Name	First Name	Employee Number	Department	Email
[Redacted]	[Redacted]	[Redacted]	Obstetrics and Gynecology	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Obstetrics and Gynecology	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Obstetrics and Gynecology	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Obstetrics and Gynecology	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Obstetrics and Gynecology	[Redacted]

By selecting the information that you need, the data will be exported into excel. Please note, that we are still working on adding additional information to this export.

 Supervisor Export

Personal Information

<input type="checkbox"/> Last Name	<input type="checkbox"/> Former Last Name
<input type="checkbox"/> First Name	<input type="checkbox"/> Preferred First Name
<input type="checkbox"/> Birthdate	<input type="checkbox"/> Gender
<input type="checkbox"/> Spoken Languages	<input type="checkbox"/> Ethnicity
<input type="checkbox"/> Comments	

Contact Information

<input type="checkbox"/> Residence Addr. 1	<input type="checkbox"/> Mailing Addr. 2
<input type="checkbox"/> Residence Addr. 2	<input type="checkbox"/> Mailing Addr. City
<input type="checkbox"/> Residence Addr. City	<input type="checkbox"/> Mailing Addr. Province
<input type="checkbox"/> Residence Addr. Province	<input type="checkbox"/> Mailing Addr. Country
<input type="checkbox"/> Residence Addr. Postal	<input type="checkbox"/> Mailing Addr. Postal
<input type="checkbox"/> Residence Addr. Phone	<input type="checkbox"/> Mailing Addr. Phone
<input type="checkbox"/> Residence Addr. Alt. Phone	<input type="checkbox"/> Mailing Addr. Alt. Phone
<input type="checkbox"/> Residence Addr. Pager	<input type="checkbox"/> Send Correspondence To
<input type="checkbox"/> Mailing Addr. 1	<input type="checkbox"/> Contacts/Engagements

The data selected here will be exported into excel. You can also select faculty in the personnel screen and copy their emails into a clipboard to email from your personal email.

NEED SUPPORT?

All FHS DB User Guides can be found on the [FHS DB website](#)