How to Correct Faculty Appointments in FHS DB (HR)

Target Audience: Human Resources/Faculty Relations

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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.
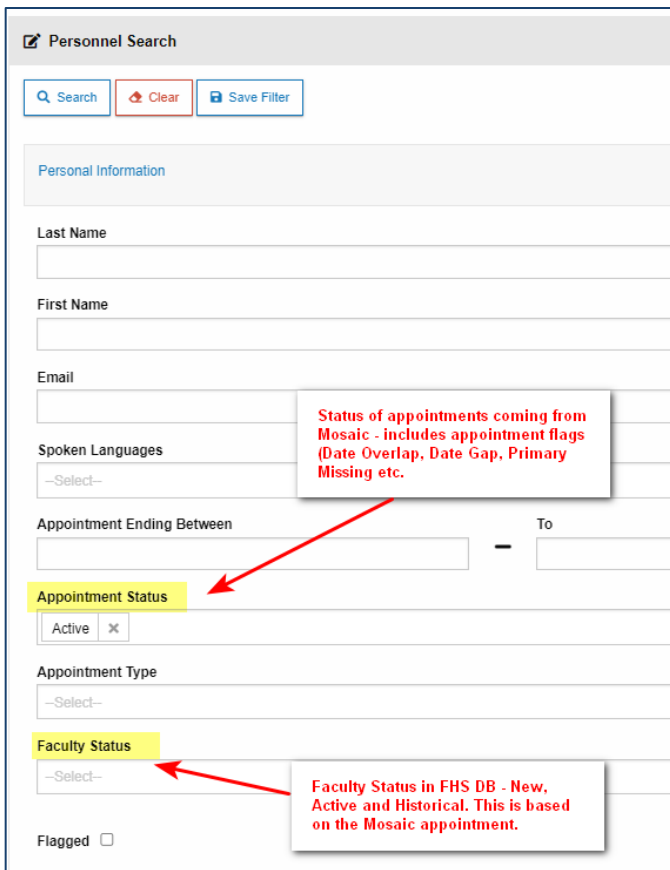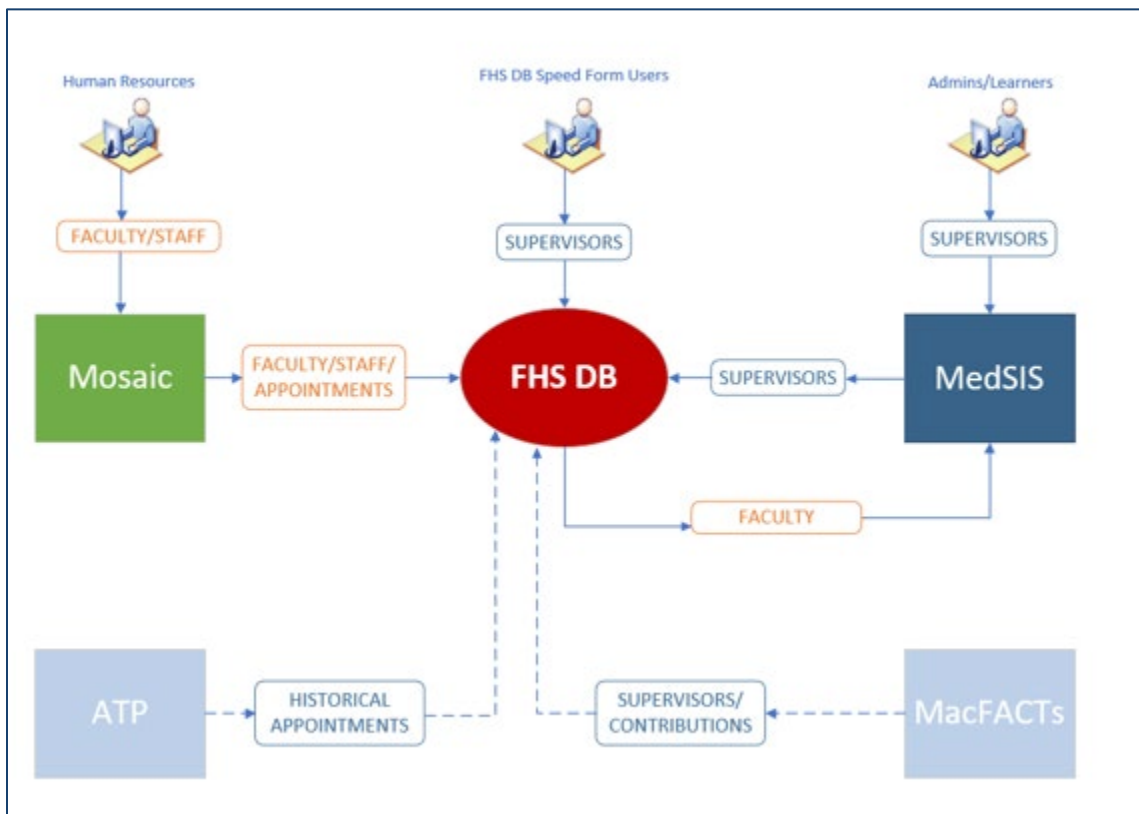

LOGIN TO FHS-DB

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

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.

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

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.

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

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.

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.

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.

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.

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

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

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

- 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

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.

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

EXPORTING FACULTY INFORMATION

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

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.

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