Requesting Student Appointments

Please keep in mind when using this application that you should click on “Return” (not the back arrow in the browser) in the upper right corner to return to a previous screen.

1. Go to: https://my.education.illinois.edu/
2. Login with your Enterprise username and password.
3. Hover over “STAFF”
   a. Choose “HR APPOINTMENTS” from the drop down list.
4. If you have students that you supervise currently or will supervise in the future, they will be listed in a table entitled “Current and Future Appointments”. If you have no current or future appointments, skip to step 9. There may be more than one appointment for a student. We ask that you review the information for each of these appointments (i.e., title, FTE, CFOP, start date and end date) and determine if one of the actions listed in the far right column entitled Action needs to be performed. The actions could be any of the following:
   a. [Reappoint] will be an option for current or past appointments.
   b. Reappointment request started. Continue with request. – will be an option if you already started a reappointment.
   c. [Do not reappoint] will be an option for current or past appointments.
   d. [Change] will be an option for current or future appointments.
5. If you click on [Reappoint]:
   a. You will then be asked to “Select a date range:”.
      i. Select the [semester/range] that applies to the appointment you would like to request.
        1. You will then be directed to the employee/student’s personal record with a picture of the employee/student so you can ensure you have the right individual.
        2. Under the picture is a table entitled “Other Future Appointments” and is only for your information.
        3. The next set of information is entitled “Academic Program” and is only for your information.
        4. The next set of information is entitled “Position Details” and is where you will begin entering and reviewing the appointment information.
           a. Hiring Unit: Ensure the correct Unit (i.e., C&I, EPOL, EPSY, SPED) is chosen from the drop down list.
           b. Position Type: Ensure that the correct position type (i.e., Research Assistant, Teaching Assistant, Grad Hourly, etc.) is chosen from the drop down list.
           c. Job Title: Ensure the job title (which is typically the same as the position type) is correct.
           d. Please do not change the 100% FTE Base Monthly Rate these rates are the same for all grad appointments.
5. Scroll down to the table entitled “Dates and Funding*”. Use the following directions to enter the student appointment.
   a. The “Appointment Start Date” should already be completed from the information you provided in the previous screen. Ensure this is correct.
   b. The “Appointment End Date” should already be completed from the information you provided in the previous screen. Ensure this is correct.

6. “Date Range 1” is the next table. Review the information and determine if you need to Edit it, Remove it, or Continue.
   a. If you would like to edit this appointment click [Edit] in the Action column.
      i. You will then be allowed to change the Processing Org, Start Date, End Date, and %FTE. Then click on [Save] or [Cancel].
   b. If you would like to remove this appointment click [X] in the Action column and the appointment will be removed.
   c. If you would like to continue with the appointment, review the information in the column entitled Title CFOP to ensure the appointment is on the appropriate fund. If you are not sure if this is the correct CFOP number, please enter detailed information in the Comments or justification cell at the bottom of the screen. Finance and HR will review this information to ensure the correct CFOP is used.

7. “Graduate Descriptors” is the next required information. Choose at least one of the descriptors to identify the work being performed by this position. The duties you select will be included in the offer letter. Details regarding the duties and responsibilities can be included in the next field.

8. “Duties and responsibilities” is the next information. This is an optional field where the duties and responsibilities can be described in more detail. It is helpful to include additional details about the duties and responsibilities if one of the Graduate Descriptors was not an adequate description.

9. “Comments or justification” is where additional information can be provided. This could include a description of the funding or any other details that need to be provide.

10. “Notes” can be used to provide any notes that should be saved and viewed for future reference. If this is a TA, please indicate which course the TA will be assisting with.

11. Skip to step 10 in the main steps.

6. If you click on Reappointment request started. Continue with request
a. You will then be directed to the employee/student’s personal record with a picture of the 
employee/student so you can ensure you have the right individual.
b. Under the picture is a table entitled “Other Future Appointments” and is only for your 
information.
c. The next set of information is entitled “Academic Program” and is only for your 
information

d. The next set of information entitled “Position Details” is where you will begin entering 
and reviewing the appointment information.
   i. **Hiring Unit**: Ensure the correct Unit (i.e., C&I, EPOL, EPSY, SPED) is chosen from 
      the drop down list
   ii. **Position Type**: Ensure that the correct position type (i.e., Research Assistant, 
      Teaching Assistant, Grad Hourly, etc.) is chosen from the drop down list.
   iii. **Job Title**: Ensure this is your current job title which is typically the same as the 
      position type is correct.
   iv. Please do not change the **100% FTE Base Monthly Rate** these rates are the 
      same for all grad appointments.

e. The next set of information is entitled “Dates and Funding*”. Use the following 
directions to enter the student appointment.
   i. The “**Appointment Start Date**” should already be completed from the 
      information you provided in the previous screen. Ensure this is correct.
   ii. The “**Appointment End Date**” should already be completed from the 
      information you provided in the previous screen. Ensure this is correct.

f. “**Date Range 1**” is the next table. Review the information and determine if you need to 
   Edit it, Remove it, or Continue.
   i. If you would like to edit this appointment click [Edit] in the **Action** column.
      1. You will then be allowed to change the Processing Org, Start Date, End 
         Date, and %FTE. Then click on [Save] or [Cancel].
   ii. If you would like to remove this appointment click [X] in the **Action** column and 
      the appointment will be removed.
   iii. If you would like to continue with the appointment, review the information in 
      the column entitled **Title CFOP** to ensure the appointment is on the appropriate 
      fund. If you are not sure if this is the correct CFOP number, please enter 
      detailed information in the Comments or justification cell at the bottom of the 
      screen. Finance and HR will review this information to ensure the correct CFOP 
      is used.

g. “**Graduate Descriptors**” is the next required information. Choose at least one of the 
   descriptors to identify the work being performed by this position. The duties you select 
   will be included in the offer letter. Details can be provided in the next field.

h. “**Duties and responsibilities**” is the next information. This is an optional field where the 
   duties and responsibilities can be described in more detail. It is helpful to include 
   additional details about the duties and responsibilities if one of the Graduate 
   Descriptors was not an adequate description.
i. “Comments or justification” is where additional information can be provided. This could include a description of the funding or any other details that need to be provide.

j. “Notes” can be used to provide any notes that should be saved and viewed for future reference. If this is a TA, please indicate which course the TA will be assisting with.

k. Skip to step 10 in the main steps.

7. If you click on [Do not reappoint]
   a. You will be given another chance before canceling the appointment. The cell under the Action column will ask: Are you sure you do not want to reappoint?
      i. If you are sure you should click on [confirm] and the appointment will be deleted from your screen.
      ii. If you are not sure you should click on [cancel] and the screen will return to the previous screen so you can choose another option for the employee/student.

8. If you click on [Change]
   a. You will then be directed to the employee/student’s personal record with a picture of the employee/student so you can ensure you have the right individual.
   b. Under the individual’s picture is an area entitled “Position Details” which is where you will begin changing the appointment information.
      i. Hiring Unit: Ensure the correct Unit (i.e., C&I, EPOL, EPSY, SPED) is chosen from the drop down list
      ii. Position Type: Ensure that the correct position type (i.e., Research Assistant, Teaching Assistant, Grad Hourly, etc.) is chosen from the drop down list.
      iii. Job Title: Ensure the job title (which is typically the same as the position type) is correct.
      iv. Please do not change the 100% FTE Based Monthly Rate as these rates are the same for all grad appointments.
   c. Scroll down to “Dates and Funding*”. Use the following directions to correct the appointment:
      i. If necessary, correct the “Appointment Start Date”.
      ii. If necessary, correct the “Appointment End Date”.
   d. “Date Range 1” is the next table. Review the information and determine if you need to Edit it, Remove it, or Continue.
      i. If you would like to edit this appointment click [Edit] in the Action column.
         1. You will then be allowed to change the Processing Org, Start Date, End Date, and %FTE. Then click on [Save] or [Cancel].
      ii. If you would like to remove this appointment click [X] in the Action column and the appointment will be removed.
      iii. If you would like to continue with the appointment, review the information in the column entitled Title CFOP to ensure the appointment is on the appropriate fund. If you are not sure if this is the correct CFOP number, please enter detailed information in the Comments or justification cell at the bottom of the screen. Finance and HR will review this information to ensure the correct CFOP is used.
e. “Graduate Descriptors” is the next required information. Choose at least one of the descriptors to identify the work being performed by this position. The duties you select will be included in the offer letter. Details regarding the duties and responsibilities can be included in the next field.

f. “Duties and responsibilities” is the next information. This is an optional field where the duties and responsibilities can be described in more detail. It is helpful to include additional details about the duties and responsibilities if one of the Graduate Descriptors was not an adequate description.

g. “Comments or justification” is where additional information can be provided. This could include a description of the funding or any other details that need to be provide.

h. “Notes” can be used to provide any notes that should be saved and viewed for future reference. If this is a TA, please indicate which course the TA will be assisting with.

i. Skip to step 10 in the main steps

9. If you have no current or future appointment and would like to create a new student appointment, please click on [Create New Job] on the third line from the top of the screen.

   a. You can now search by the First and Last Name, UIN, or Network ID.

   b. Type in one of these three options and click on [Search].

   c. If a match is found, a list of results will populate. Review the list and determine the most compatible option reviewing the name, title, organization, employee class, and position class. If the record appears to be the student you would like to hire, click on [Hire this person].

   d. You will then be directed to the student’s personal record with a picture so you can identify that you have the right individual.

   e. If the employee has other appointments there will be a table entitled “Other Future Appointments” and is only for your information.

   f. The next set of information is entitled “Academic Program” and is only for your information.

   g. Scroll down to the area is entitled “Position Details” and is where you will begin entering and reviewing the appointment information.

      i. **Hiring Unit**: Choose the correct Unit (i.e., C&I, EPOL, EPSY, SPED) from the drop down list

      ii. **Position Type**: Choose the correct position type (i.e., Research Assistant, Teaching Assistant, Grad Hourly, etc.) from the drop down list.

      iii. **Job Title**: This field will populate and is typically the same as the position type. Ensure that it is correct and change if necessary.

      iv. Please do not change the **100% FTE Base Monthly Rate** or the **Federal Work Study** field. These fields will be reviewed by the HR Unit.

   h. The next set of information is entitled “**Dates and Funding**”

      i. **Start Date**: choose a start date from the drop down menu or chose “Other” and type in a start date.

      ii. **End Date**: choose an end date from the drop down menu or chose “Other” and type in an end date.
iii. **%FTE**: type in the percent of FTE (i.e., 25, 50). Do not type the percent sign, only numbers.

iv. **Processing Org**: if the populated organization is not correct, choose the correct organization from the drop down menu.

v. Click on **Add**.

i. The “**Date Range 1**” table will populate. Review the information and determine if you need to Edit it, Remove it, or Continue.

   i. If you would like to edit this appointment, click [**Edit**] in the **Action** column. If not, continue with the next step (ii.).

      1. You will then be allowed to change the Processing Org, Start Date, End Date, and %FTE. Then click on [**Save**] or [**Cancel**].

   ii. If you would like to remove this appointment click [**X**] in the **Action** column and the appointment will be removed.

   iii. If you would like to continue with the appointment, the next step will be to determine if you know the CFOP for the funding information.

      1. **If you know the CFOP**, click on the down arrow for the drop down list of the **CFOPA (Index) – Title**. If one of these CFOPs is the correct funding source, you can choose it. If the CFOP is not in this list, you can click on “the account I want to use is not listed”, type in the CFOP, and click **Add**.

      2. **If you do not know the CFOP**, click on “the account I want to use is not listed”,

         a. Type a short description of the fund in the “**Title**” field.

         b. The **Chart** field will populate to “1”.

         c. In the **Fund** field type all “1’s” (e.g., 111111) and press tab to go to the next field.

         d. In the **Org** field type the organization code for the unit funding the appointment. Following are the options for organization codes:

            Bureau of Educational Research – 418000
            Council on Teacher Education – 541000
            Curriculum and Instruction – 613000
            Education Administration – 335000
            Education Policy, Organization & Leadership – 760000
            Educational Psychology – 616000
            Office of Chief Information Officer – 439000
            Special Education – 570000

            Please be sure to type one of the numbers above in the **Org** field as the appointment is filtered on this number. Press tab to go to the next field.

         e. Type all “1’s” in the **Prog** (e.g., 111111) field pressing tab to go to the next field.
f. Nothing needs to be typed in the Activity field. Finance will correct the CFOP and verify the information.

g. The % of fund field only needs to be completed if this appointment will be paid on more than one fund. Otherwise it will populate to 100%.

h. Click on Add.

3. Scroll down to “Graduate Descriptors” is the next required information. Choose at least one of the descriptors to identify the work being performed by this position. The duties you select will be included in the offer letter. Details regarding the duties and responsibilities can be included in the next field.

4. “Duties and responsibilities” is the next information. This is an optional field where the duties and responsibilities can be described in more detail. It is helpful to include additional details about the duties and responsibilities if one of the Graduate Descriptors was not an adequate description.

5. “Comments or justification” is where additional information can be provided. This could include a description of the funding or any other details that need to be provide.

6. “Notes” can be used to provide any notes that should be saved and viewed for future reference. If this is a TA, please indicate which course the TA will be assisting with.

10. If you have not completed all of the information for this appointment, click on Save and Continue Later and return later to continue the appointment.

11. If the information you entered is incorrect and you would like to delete it, click on Cancel Request.

12. If you have entered all of the information for this appointment, click on Submit Appointment Request.

13. The screen will return to the top of your record indicating that the appointment request has been submitted.

14. You can now return to the main screen and sign out:
   a. Click on Return in the upper right corner
   b. Hover on “MY.EDUCATION” at the top and click on the last item in the drop down menu entitled “SIGN OUT”.

15. Additional appointments can be added at a later date, but should be added prior to the start of the appointment.
You can come back to the main screen at any time by following steps 1 through 3 and view the status of the appointment.

On the **My Employees** screen the **Pending Appointments** table shows the routing on the far right.

The routing steps are as follows:

- **SUPV** – PI, Supervisor, Faculty, or Staff enters appointment information.
- **BUS** – Finance approves CFOP – ensures correct fund is used and funds are available. Works with department/unit if source of funds is questionable and enters funding nickname (i.e., Dept ICR, State, Non-recurring, or grant nickname) in “Notes” if not already entered.
- **UNIT** – Department confirms appointment
- **HR** – HR Unit obtains Dean’s approval and reviews appointment information.
- **EXC** – HR processes Exception form if needed for Summer Faculty Appointments.
- **OFFER** – HR Unit sends offer letter if necessary
- **ACCEPT** – Acceptance of offer is received by HR.
- **FE** – HR Unit enters appointment in Front End.
- **CONF** – HR Unit confirms appointment is in Banner correctly.

Possible actions in the columns for the routing stops:

- “**Go**” in the column indicates it is waiting on action at this stop.
- A **netid** in the column, indicates who has accessed the record and is working on the appointment.
- “**A**” in the column indicates it has been approved at that stop.
- “**P**” in the column indicates it is pending at that stop.

When a **netid** turns green it indicates who viewed and approved the appointment and is finished with it.