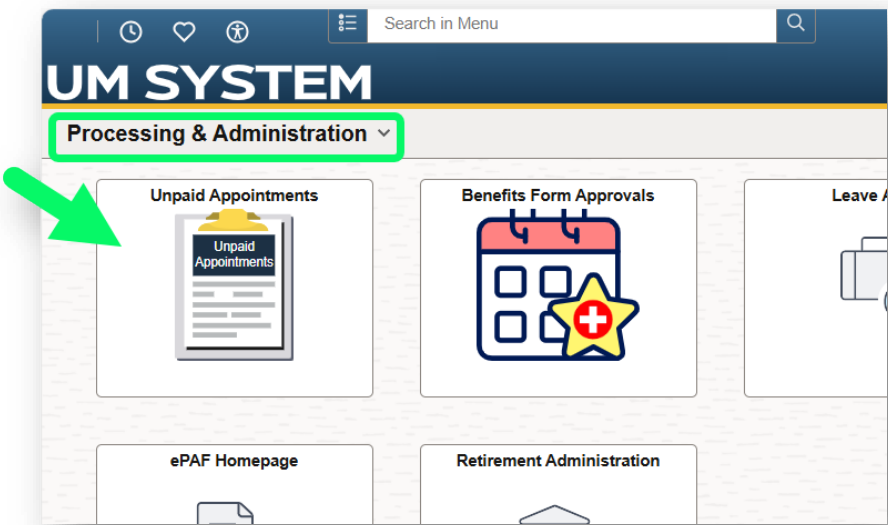# Unpaid Appointment Form

Accessing Unpaid Appointments

An unpaid appointment (UPA) may be granted based on business need. If approved, individuals granted an unpaid appointment may have access to university resources and facilities and represent the University of Missouri.

Please review HR-513 prior to requesting an unpaid appointment.

1. Log into hrprd.umsystem.edu in a browser.

   On the Processing & Administration homepage, click the **Unpaid Appointments** tile. If you are a UM Manager from KCITY or Missouri S&T, you will find this tile under 'Manager Self-Service'.

2. The **Landing Page** of the **Unpaid Appointments Request Form** appears.

Contents

Info About Unpaid Appointments

Types of Unpaid Appointments

The Landing Page of the Unpaid Appointments Request Form provides information about the types of unpaid appointments:

- **Guest Affiliate**: Individuals paid by another organization or non-University payroll or unpaid who need access to university resources for appropriate, approved purposes. Guest Affiliates include, for example, unpaid visiting scholars, research collaborators, temporary agency hires, university & non-university interns and job shadow arrangements.

- **Conditional**: University employees whose unpaid appointment is conditional upon the individual's paid appointment to gain access that would otherwise not be available through the paid appointment, such as School of Medicine and School of Nursing faculty who receive a concurrent unpaid appointment for MU Healthcare access.

- **Education Partner**: Individuals who possess a professional certification or licensure and who have agreed to teach, advise, mentor, supervise, or otherwise provide educational opportunities to university students within a non-university organization. Examples include community K-12 teachers, physicians, and other professionals providing student teaching, clinicals, practicums, or other required experiences outside the university.

- **Emeritus**: Individuals granted Emeritus status, pursuant to CRR 320.0920, may be granted an unpaid appointment.

- **Vendor**: Individuals who use the University's facilities and resources to perform their work for a contracted organization, such as contractors, outsourced services, independent contractors, and vendors. These appointments are typically paid through University accounts other than payroll and have a signed contract or agreement with the University.

- **Volunteer**: Individuals who perform services for the university for civic, charitable, or humanitarian reasons without promise, expectation, or receipt of compensation for services rendered. Volunteers include, for example, concert series ushers, athletic event volunteers, and volunteers in various healthcare settings.

- **Visiting Student**: Students who partake in University of Missouri educational experiences under a formal Education Agreement between the University of Missouri (host institution) and their home institution (affiliate). The student is engaged in learning experiences but is not enrolled as a University of Missouri student.

Unpaid Appointment Requirements

The following table shows requirement details for each type of unpaid appointment.

Unpaid Appointment Type	Initial appointment maximum*	Criminal Background Check	Compliance Training	Email	MoCode**
Guest Affiliate	1 year	University CBC	Required	University email	Dependent on Business Unit
Conditional	Aligns with paid appointment	Aligns with paid appointment	Aligns with paid appointment	Aligns with paid appointment	N/A
Education Partner	3 years	Aligns with employer agreement	Aligns with employer agreement	Business or personal email	N/A
Emeritus	Indefinite	Aligns with employer agreement	Required	University email	Dependent on Business Unit
Vendor	1 year	Aligns with employer agreement	Aligns with employer agreement	Business or personal email	Dependent on Business Unit
Visiting Student	1 year	N/A	Required	University email	Dependent on Business Unit
Volunteer	1 year	University CBC	Required	Personal email	Dependent on Business Unit

* The initial appointment term can be reduced but not increased.

** If the appointment type requires an annualized fee, a MoCode box will appear; please enter the MoCode to charge for this appointment.

Add a UPA Request eForm (ePAF Initiator)

Click the **Add an Unpaid Appt eForm** button. The Unpaid Appointment (UPA) Form presents specific additional fields depending on the unpaid appointment type selected as well as on how certain fields are answered. We attempt to cover all possibilities in the following list.

Note that on the form, fields with an asterisk * before the field name are required fields.
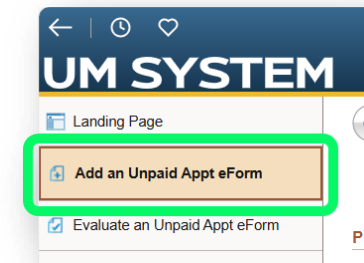
Pre-Appointment Data Form Fields

- **Appointment Type (dropdown field, required)**: The choices for this field are Conditional, Education Partner, Emeritus, Guest Affiliate, Vendor, Visiting Student, and Volunteer.

  This field is required, and your selection determines what additional fields may be required:

  - **Conditional**:

    - A required **EmplID** field appears, and the Legal First and Last name fields will automatically populate based on the employee ID that was entered.

    - Under the Justification field, a required **Current Appointment (multi-line text field)** will appear.

- o **Education Partner**:

    - New optional fields are **EmplID**, **Middle Name**, **Former Legal Name(s)**, and required fields are **Date of Birth** and **Mobile Telephone Number**.
    - Under the Justification field, a required **Select** dropdown field appears, asking "Has the appointee ever been a student or employee at any of the following?" Answer Yes or No depending on whether the appointee has been a student or employee of any of the listed campuses, including any prior unpaid appointments with the university.

- o **Emeritus**:

    - A required **EmplID** field appears, and the Legal First and Last name fields will automatically display the appropriate data.
    - A required **Pre-Retirement Department** text field appears under the Justification field. This field is used to capture the previous primary department the Emeritus was in prior to receiving this unpaid appointment.

- o **Guest Affiliate**: No additional fields appear for a guest affiliate in the Pre-Appointment Data section.

- o **Vendor**:

    - New optional fields are **EmplID**, **Middle Name**, **Former Legal Name(s)**, and required fields are **Date of Birth** and **Mobile Telephone Number**.
    - Under the Justification field, a required **Select** dropdown field appears, asking "Has the appointee ever been a student or employee at any of the following?" Answer Yes or No depending on whether the appointee has been a student or employee of any of the listed campuses, including any prior unpaid appointments with the university.

- o **Visiting Student**:
    - New optional fields are **EmplID**, **Middle Name**, **Former Legal Name(s)**, and required fields are **Date of Birth** and **Mobile Telephone Number**.
    - Under the Justification field, a required **Select** dropdown field appears, asking "Has the appointee ever been a student or employee at any of the following?" and listing the UM campuses. Answer Yes or No depending on whether the appointee has been a student or employee of any of the listed campuses, including any prior unpaid appointments with the university.

- o **Volunteer**: No additional fields appear for a volunteer appointment in the Pre-Appointment Data section.

- **Legal First Name** (required text field): Enter the appointee's legal first name. If an EMPLID is entered, this field will be static and will populate based on the entered EMPLID.

- **Legal Last Name** (required text field): Enter the appointee's legal last name. If an EMPLID is entered, this field will be static and will populate based on the entered EMPLID.

- **Start Date** (required date field): Enter the start date in MMDDYY format or click the calendar button and select the start date from the calendar that appears.

- **Auto Term Date** (required date field): This field will auto populate for appointment types that have an initial appointment maximum. You can decrease the amount of time, but you can't increase it.
  - For **Conditional** unpaid appointments, the term aligns with the paid appointment, so you must input the date manually or use the calendar button to select the appropriate auto term date if there is one.
  - For **Emeritus**, the term is indefinite, so leave the auto-term field blank unless you have a specific auto-term date.

- **Appointee Personal Email Address** (required text field): Enter the appointee's personal email address.

- **Do you have a position number?** (required dropdown field):

  - If you answer Yes, a **Position Number** field appears to the right. The Business Unit, Department, and Sponsoring Supervisor ID fields become static and will automatically display the correct data based on the Position Number you enter. Job Code and Reports To Position Number static information will also be displayed.

- **Business Unit** (required text/lookup field if there is no position number): Type in the Business Unit in ALL CAPS (to avoid an error) or use the lookup button (magnifying glass) to select it. The form will error if HOSPT or UOFMO is selected.

- **Department** (required text/lookup field if there is no position number): Type in the Department ID in ALL CAPS to avoid an error (e.g., AHRISDPT) or use the lookup button (magnifying glass) to select it.

- **Working Title** (optional text field): Enter the working title (required if the job code is 9999).

- **Sponsoring Supervisor ID** (required text/lookup field if there is no position number): Type in the supervisor EmplID or use the lookup button (magnifying glass) to select it.

- **Justification** (multi-line text field): You must enter "a brief justification of the business need, role, and duties of this position".

Appointment Work Location Section

- **Duties Location** is a required dropdown field. The choices are as follows:

  - **On-Site**: No additional fields appear.

  - If **Hybrid** or **Remote** is selected, additional required Yes/No dropdown fields appear:

    - **L1: Will part or all of the work be performed outside of Missouri?** If Yes is selected, a note appears stating, "If outside Missouri, other state regulations may apply."

    - **L2: Will part or all of the work be performed outside of the United States?** If Yes is selected, a note appears stating, "If outside the USA, attach approval from the Research Security and Compliance department:"

    - If Yes is selected in either of the two previous fields, the **State or Country** text field will appear, and it is required.

Appointment Work Location

*Duties Location [Hybrid ⌄]

If Hybrid or Remote answer the following:

Will part or all of the work be performed outside of Missouri?

*L1 [Yes ⌄]

If outside Missouri, other state regulations may apply.

Will part or all of the work be performed outside of the United States?

*L2 [⌄]

If part or all of the work will be performed outside of Missouri and/or the United States, please provide the state or country the work will be performed in:

*State or Country [   ]

Work Address Section

- **Is a Work Address change needed?** (required dropdown field): If **Yes** is selected, the address fields become active, and the following fields are required:

  - Address Line 1
  - City
  - State
  - Postal Code

  Address Line 2 and **Work Telephone** are optional.

Duties Section

The following is a list of the questions in the Duties section. While all unpaid appointment types will see the first three questions (D1-D3), questions D4 through D8 are only required for some appointment types. Please refer to the *Questions Required by UPA Type* table below to see which questions are required for each appointment type.

Will this person:

- **D1: Work on funded research, supported by external sources (e.g., sponsored programs, grants, or contracts) or internal sources (e.g., departmental, start-up, or seed funds)?**
  If **Yes** is selected for **D1** (dropdown field), this message appears:
  "Please attach approval from the Research Security and Compliance Department."

- **D2: Work with or around students?**
  If **Yes** is selected for **D2** (dropdown field), this message appears:
  "Please note that processing may take up to a week or more depending on the Appointment Type, after which you may follow your campus process to request FERPA training/access."

- **D3: Supervise minors?**
  If **Yes** is selected for **D3** (dropdown field), this message appears dependent on appointment type:
  "If yes, contact umyouthprograms@umsystem.edu to review training requirements based on appointment type."

- **D4: Be responsible for driving on behalf of the University?**
  No additional information appears whether you answer yes or no, but a yes answer will trigger the system to notify the final approver that a Motor Vehicle Report (MVR) must be run on the appointee.

- **D6: Have contact with university faculty, staff, and/or students, including on-site and virtually?**
  No additional information appears whether you answer yes or no, but a yes answer will trigger the system to send the appointee's information to Percipio where the appropriate compliance training necessary to satisfy this requirement will be assigned.

- **D7: Have contact with university buildings or infrastructure (i.e. physically present on campus or other official university locations)?**
  No additional information appears whether you answer yes or no, but a yes answer will trigger the system to send the appointee's information to Percipio where the appropriate compliance training necessary to satisfy this requirement will be assigned.

- **D8: Have contact with University IT systems (i.e. university email or other IT systems)?**
  No additional information appears whether you answer yes or no, but a yes answer will trigger the system to send the appointee's information to Percipio where the appropriate compliance training necessary to satisfy this requirement will be assigned.

- **Visiting Scholar** (required dropdown field): If the **Guest Affiliate** is "a scholar from another university, research institution, government agency, non-profit organization on leave, or sabbatical with the purpose of participating in a university-sponsored educational program, cooperative agreement, or collaborative research project under the supervision of the University", select **Yes**. If you select Yes and did not choose the 9542 job code above, you will receive an error.

  Selecting Yes reveals two new required fields:

  - **Name of Institution, Agency or Organization** (text field).
  - **Role at Institution** (multi-line text box).

Table: Questions Required by UPA Type

APPOINTMENT TYPE	D1	D2	D3	D4	D6	D7	D8
Guest Affiliate	X	X	X	X	X	X	X
Conditional	X	X	X				
Education Partner	X	X	X				
Emeritus	X	X	X		X	X	X
Vendor	X	X	X				
Visiting Student	X	X	X		X	X	X
Volunteer	X	X	X	X	X	X	X

Attestation Section

- Please read the information about **Approvals** and **Acknowledgement** and then expand the options in the "**I agree**" dropdown field and select a response.

  - o   If you select **Yes**, proceed to the next section.
  - o   If you select **No**, a dialog box appears, stating that "Acknowledgement must be agreed on to submit."

- Some business units and appointment types may have a fee associated with the appointment and in those cases, you must provide a MoCode in the required **MoCode to be charged** text field.

File Attachments Section

Use the **Upload** button in the File Attachment section to upload supporting documentation for unpaid appointments (e.g., approvals from designated officials or departments). All supporting documentation can be combined into one file with multiple documents. If they are not compiled into one file, use the Add button to add a row for each subsequent document.

Comments Section

The Comments field is a multi-line text box and completing it is optional.

When all required fields are completed and Yes is chosen for the Attestation, click the **Submit** button.

Evaluate a UPA eForm (Campus Approver)

When a UPA form is submitted by an Initiator, an email requesting the UPA be evaluated is automatically sent to the first approver. The approver's steps are as follows:

1. Access Unpaid Appointments in HRPRD.

a. Click **Evaluate an Unpaid Appt eForm** in the lefthand menu.

b. Enter the **Form ID** from the email.

c. Click **Search**.

   Note: You can click Search without entering a Form ID and all UPA eForms awaiting your review will appear in the results section beneath the form fields. Click the one you want to evaluate and proceed to the next step.

2. The **Evaluate Unpaid Appointment (UPA)** page opens with details about the selected UPA.

   a. Reviewers cannot change any of the responses.

   b. Click the **View** button to open and review any attachments, which will open in a new tab.

   c. **Comments** are optional.

   d. If a candidate should be disqualified, **first add comments to inform the initiator why the form is being denied**, and then click the **Deny** button to cancel the appointment completely. (_Skip to Step 4_.)

   e. If a certain response requires more information, **first add comments to inform the initiator why the form is being recycled**, and then click the **Recycle** button to send the form back to the initiator to update. (_Skip to Step 5_).

   f. If the reviewer finds that everything is in order, they will click the **Approve** button.

3. If the **Approve** button is selected, an <u>email is sent to the next approver</u> if one exists, or for final approvers, an <u>email is sent to the initiator</u> notifying them that the UPA was approved and executed.

    The **Evaluate Unpaid Appointment (UPA) : Results** page appears.

a. A message confirming successful approval of the eForm is displayed at the top of the page.

b. If the eForm has been routed to another approver, that message is displayed as well.

c. The **Transaction / Signature Log** displays actions that have been performed so far in the process.

d. You may click the **Refresh Log** button (repeatedly if necessary) if you don't see your latest transaction.

4. If the **Deny** button is selected, an email message is sent to the initiator and the **Evaluate Unpaid Appointment (UPA) : Results** page appears.

a. A message at the top confirms that the form has been successfully denied.

b. The **Transaction / Signature Log** displays actions that have been performed so far in the process.

c. You may click the **Refresh Log** button (repeatedly if necessary) if you don't see your latest transaction.

5. If the **Recycle** button is selected, an email message is sent to the initiator and the **Evaluate Unpaid Appointment (UPA) : Results** page appears.

a. A message at the top confirms that the form has been successfully recycled.

b. The **Transaction / Signature Log** displays actions that have been performed so far in the process.

c. You may click the **Refresh Log** button (repeatedly if necessary) if you don't see your latest transaction.
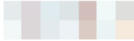
Final Approval of a UPA

Not all UPA eForms require the final approval steps, and some types may or may not require it depending on their EMPLID status.

- For appointee types of **Education Partner**, **Vendor** or **Visiting Student**, no further action is needed after campus approval unless Search/Match finds the possibility of an existing EMPLID and/or there is any concern regarding rehire eligibility. In those cases, the UPA will be routed for a final review in which the information is examined, and a determination is made on whether the individual has an existing EMPLID and/or the UPA is eligible for rehire.

- The appointee types of **Guest Affiliate** and **Volunteer** must complete their own appointee form with personal information, and those always go to the final review.

A Guest Affiliate appointee type is demonstrated in the following steps.

1. Search for the appropriate appointee on the **Evaluate an Unpaid Appt eForm** search page as described in the first step of the *Evaluate a UPA eForm* topic.

2. The **Unpaid Appointment (UPA) Form** page opens for the selected appointee. As in the Campus Approver procedure, the fields completed by the ePAF Initiator are not editable.

    Review the information, and at the bottom of the page, click the **Next** button.
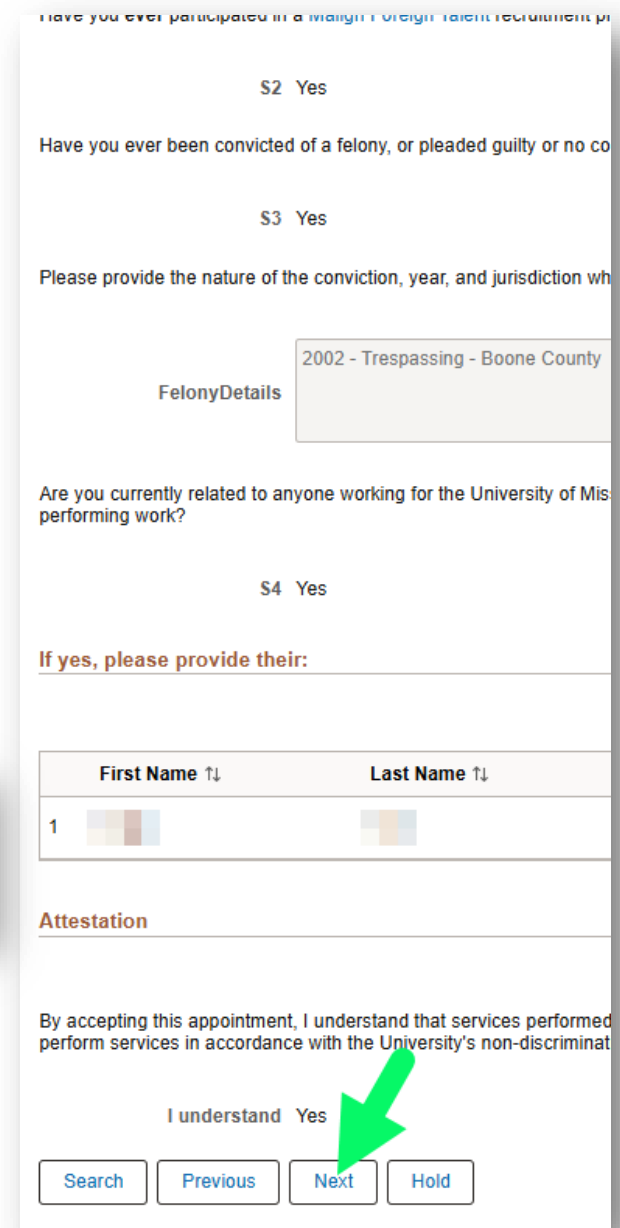
3. The **Appointee Information** page appears. The fields completed by the appointee are for review only and are not editable by the reviewer.

    Review the information, and at the bottom of the page, once again click the **Next** button.

4. The **Evaluate Unpaid Appointment (UPA) : Final Review** page opens.

    a. The first paragraph states that if a possible match has been found, the matching criteria (e.g., Last Name and DOB) will be displayed below (see step 4d).

    b. The second paragraph instructs the reviewer to enter the emplID into the required **Empl ID** field if a match is found or select "Yes" in the required **New Emplid Needed** dropdown field if no match is found.

    c. The third paragraph states that if a potential rehire eligibility issue that needs to be reviewed is found, a note will be displayed below (step 4d).

    d. A note appears in the area below the paragraphs if something described in steps 4a and/or 4c was found. It also will display the First Name, Last Name, and Date of Birth listed on the form.

    e. The "**OK to proceed with rehire?**" field will only appear IF the potential rehire issue notice is displayed above (4d). If the field does appear and it is determined that it is *not* ok to proceed, expand the field and select "No". Then, in the Comments field, add a reason why it should not proceed and deny the form.

        Note: The comments should be generic and not contain any identifiable information, since the notes will appear in the overall form comments which are visible by all who can view the form. If No is selected, and an error will appear if the Approve button is clicked.

    f. If upon reviewing Search/Match it is determined that these are the same individual, expand the **New Emplid Needed** dropdown field and select **No**. However, if the reviewer determines that these are two different individuals, select **Yes**.

    g. If **No** was selected in the **New EMPLID Needed** field, the **EMPLID** field will populate with the match found and will display the name of the individual in that EMPLID. Make sure this information matches what is on the form.

5. The **Screening Question Review** section:

    a. Lists the appointee responses that need manual review (e.g., potential nepotism, felony conviction, etc.).
    See Screening Question Review Types *to see all possible responses.*

    b. The **Screening Comments** are for the form user to describe their findings, (e.g., "I reviewed for nepotism, and determined there is no conflict"). Comments will not be displayed on any type of notification email or loaded anywhere in PeopleSoft.

Screening Question Review

Needs Review: Potential nepotism ⓐ

Screening Comments I reviewed for nepotism, and determined there is no conflict ⓑ

Note: If "CBC is required" is listed, the reviewer will launch a criminal background check on the appointee (next step). If the appointee will be driving on behalf of the University of Missouri, a Motor Vehicle Report (MVR) will need to be run as a part of the CBC.

6. The **Criminal Background Check** section:

    a. Expand the **Select the status of the CBC** dropdown field and select a response: **Complete**, **Not Applicable** or **Not Complete**.

    b. If the CBC is not complete, you have the option of clicking the **Hold** button at the bottom of the page.

    (In order to put the form on hold, you must first select a status in the "Select the status of the CBC" field above.)

Criminal Background Check

*Select the status of the CBC

CBC Comments   Complete
               Not Applicable
               Not Complete ⓐ

Search   Previous   Deny   Hold ⓑ   Approve

7. The **Evaluate Unpaid Appointment (UPA) : Results** screen appears when Hold is selected in the previous step.

   a. A message at the top of the page states that the eForm has been successfully held.

   b. The **Transaction / Signature Log** includes a row showing that the form action is on Hold.

   c. You may click the **Refresh Log** button (repeatedly if necessary) if you don't see your latest transaction.

8. When you're ready to return to the UPA (e.g., after the CBC has been completed), click **Update an Unpaid Appt eForm**, enter the **Form ID** and/or click **Search**. On the **Unpaid Appointment (UPA) Form** page for the selected appointee, scroll to the bottom and click the **Next** button. Click the **Next** button on the next page as well.

9. In the **Criminal Background Check** section:

    a. Expand the **Select the status of the CBC** dropdown field and select **Complete**.

    b. You have the option to enter comments in the **CBC Comments** multi-line text field regarding the review of the CBC (e.g., "The CBC came back fine," or "Upon review of the CBC, we do not recommend appointing this individual."). These comments will only be contained in the form. They will not be included in notification emails or load anywhere in PeopleSoft.

    c. If the appointee is unable to hold an unpaid appointment for any reason, enter the reason (in the Comments section above) that the form is being denied, and then click the **Deny** button. A message will be sent to the Sponsoring Supervisor when a form is denied.

    d. Click the **Approve** button at the bottom of the page if the CBC comes back with no issues.
        The UPA will automatically load into the Job Data.

Screening Question Review Types

- Needs Review: Current participant in Malign Foreign Talent recruitment program
- Needs Review: Has participated in Malign Foreign Talent recruitment program
- Needs Review: Has felony conviction
- Needs Review: Potential nepotism
- Appointee will be driving on behalf of the University of Missouri
- CBC is required
- Rehire Eligibility review needed

Appendix

Email Examples

Welcome email to Initiate the Hiring Process
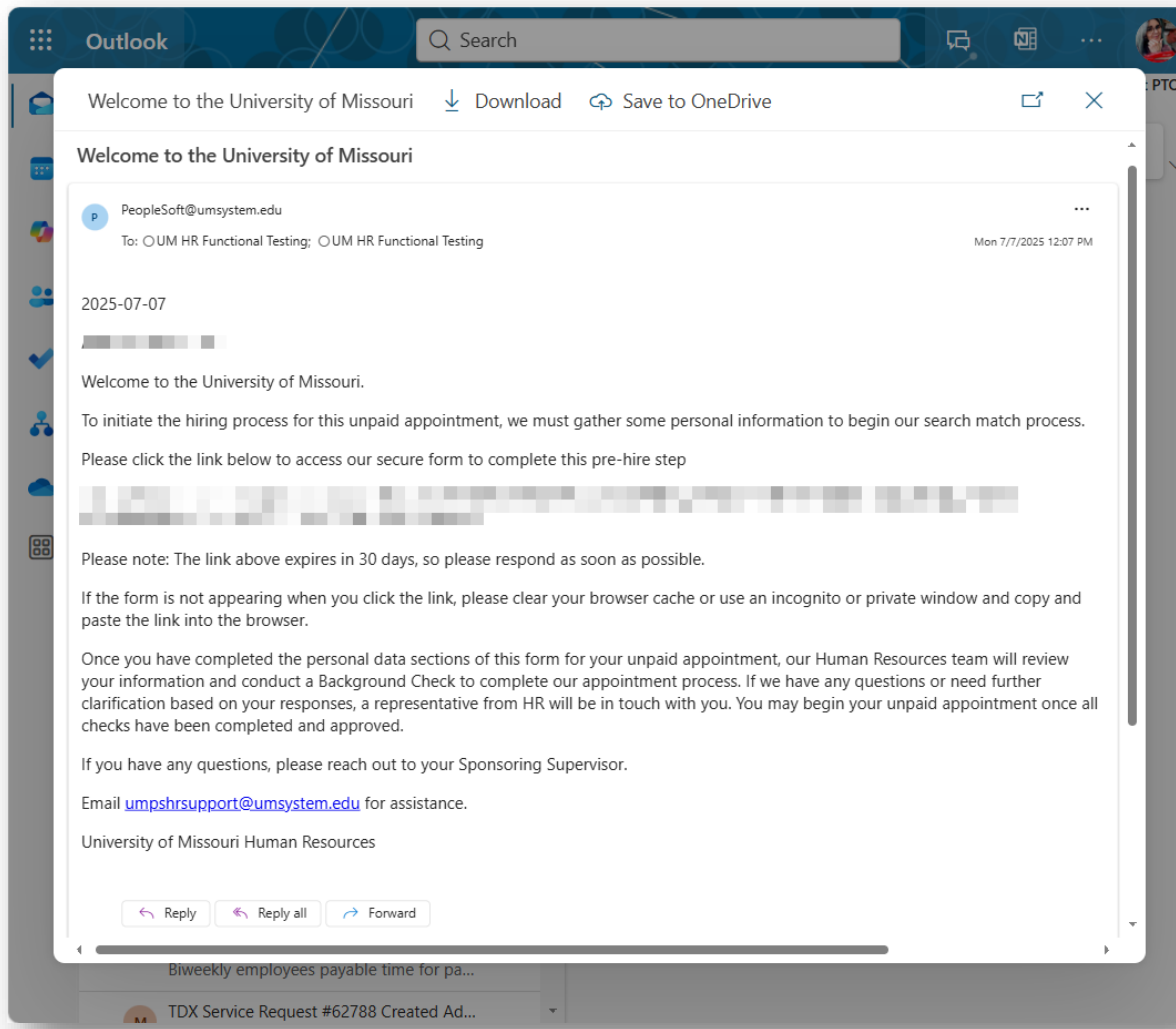
Worklist Item: Evaluate UPA Request for [Individual]

ePAF Worklist Item: Evaluate ROLLA (RCEC) UPA request 3960667 for ▓▓▓ ▓▓

P   PeopleSoft@umsystem.edu   ···

To: ○ UM HR Functional Testing; ○ UM HR Functional Testing; **+5 others**   Wed 7/16/2025 2:43 PM

You have a pending worklist item to review/process for the following request for an unpaid appointment. Please login to PeopleSoft HR to evaluate this item.

Form ID: 3960667

Name: ▓▓▓▓▓

Business Unit: ROLLA

DeptID: RCOMPSCI

CSD: RCEC

Requested by ▓▓▓ on 2025-07-15

Comments:

Worklist Item: Reconsider UPA Request for [Individual]

This is an example of an email that is automatically sent to the Initiator when a UPA request is recycled.

Worklist Item: Reconsider COLUM UPA Request for ▓▓▓▓▓ **in CENGLISH (CA&S)**

P | PeopleSoft@umsystem.edu | ...

To: ○ UM HR Functional Testing   Thu 7/17/2025 8:55 AM

The following unpaid appointment (UPA) form has been recycled and is pending in your worklist. You must decide whether to resubmit or withdraw this form.

Please login to PeopleSoft HR to update this form. Click on the Unpaid Appointments tile, then Update an Unpaid Appt eForm and search for the Form ID listed below.

Form ID: 3960683

Name: ▓▓▓▓▓▓

Business Unit: COLUM

Department: CENGLISH

CSD: CA&S

Start Date: 2025-08-01

Comment History:

↩ Reply   → Forward

UPA Form for [Individual] has been denied

FYI: COLUM (CA&S) UPA Form 3960683 for ▮▮▮▮▮▮ ▮▮▮ has been denied

P PeopleSoft@umsystem.edu   ...

To: ○ UM HR Functional Testing   Thu 7/17/2025 8:56 AM

For your information, this request has been denied. This permanently ends processing of this form.

No further action on your part is needed at this time. For questions, please contact your HR office.

Form ID: 3960683

Name: ▮▮▮ ▮▮▮▮▮

Business Unit: COLUM

DeptID: CENGLISH

CSD: CA&S

Requested by ▮▮▮▮ on 2025-07-17

Comments:

↩ Reply   → Forward

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Support: umpshrsupport@umsystem.edu
Updates: techwriters@umsystem.edu
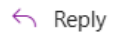
UPA for [DEPT], [Individual] has been executed

FYI: ROLLA UPA for ▒▒▒▒▒▒ **in RHUMNRES (RADMN) has been executed**

P   PeopleSoft@umsystem.edu   •••

To: ⊙ UM HR Functional Testing   Wed 7/16/2025 1:55 PM

For your information, this request has been executed. Processing is complete!

Form ID: 3960669

EmplID: ▒▒▒▒▒

Name: ▒▒▒▒ ▒▒▒▒

Business Unit: ROLLA

DeptID: RHUMNRES

CSD: RADMN

Requested by ▒▒▒▒ on 2025-07-15

Comments:

↩ Reply   → Forward

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Support: umpshrsupport@umsystem.edu
Updates: techwriters@umsystem.edu

Job Codes

The following chart lists the eligible job codes for each unpaid appointment type.

JOB CODES	GUEST AFFILIATE	CONDITIONAL	EDUCATION PARTNER	EMERITUS	VENDOR	VOLUNTEER	VISITING STUDENT
0070 Guest Affiliate Rsch Upd Appt	X						
0071 Guest Affil Intern Unpd Appt	X						
0072 Guest Affil Temp Agcy Unpd Apt	X						
0073 Guest Affiliate Other Unpd Apt	X						
0074 Emeritus				X			
0075 Conditional Unpd Appt		X					
0076 Educ Parter Clinical Unpd Appt			X				
0077 Educ Prtnr Non-Clin Unpd Appt			X				
9992 Vendor Access Unpd Appt					X		
9996 Volunteer Unpaid Appt						X	
9542 Scholar, Visiting	X						
9999 Upd Appt, Other	X		X		X		
9989 Visiting Student							X

Process Flowchart by Roles

The image shown might not be the most recent version. The most recent version of this flowchart can be accessed by clicking this link: Unpaid Appointment Process | Roles. This flowchart is described in text below.
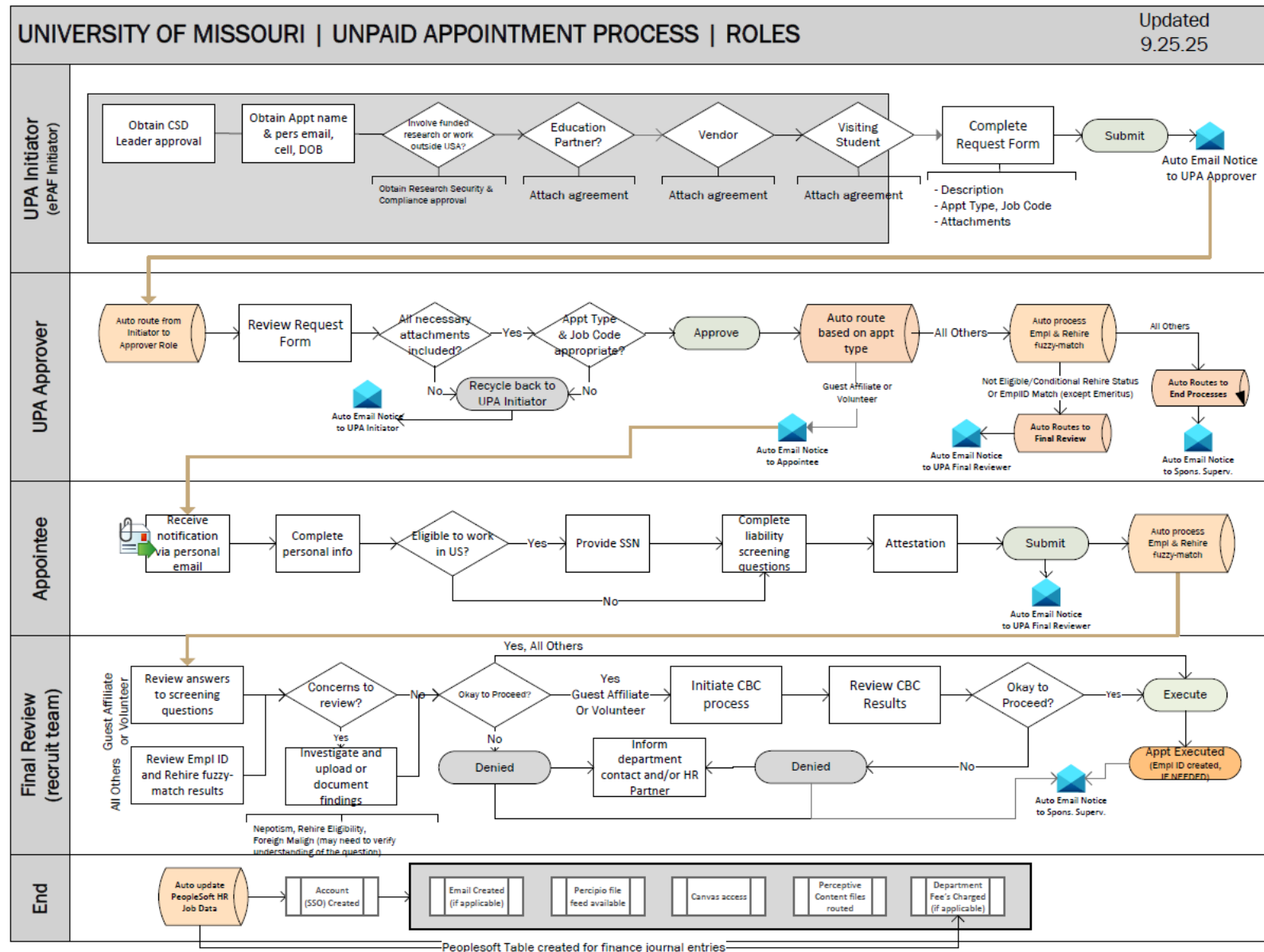
Process Flowchart by Roles Described in Text

UPA Initiator (ePAF Initiator)
1. Obtain CSD Leader or Delegates approval. Obtain Appointee's name and personal email, cellphone, DOB.
   a. Education Partner or Vendor? Attach agreement or MOU
   b. Involve research or outside USA? Obtain Research Security and Compl approval
2. Compete Request Form
   a. Description
   b. Appt Type, Job Code
   c. Attachments
3. Submit
   a. Auto Email Notice to UPA Approver
   b. Next step is UPA Approver

UPA Approver
1. Auto route from Initiator to Approver Role
2. Review Request Form
3. All necessary attachments included?
   a. Yes? Proceed to step 4.
   b. No? Recycle back to UPA Initiator; Auto Email Notice to UPA Initiator
4. Appt Type & Job Code appropriate?
   a. Yes? Approve and proceed to step 5.
   b. No? Recycle back to UPA Initiator; Auto Email Notice to UPA Initiator
5. Auto route based on appt type
   a. Guest Affiliate or Volunteer
      i. Auto Email Notice to Appointee
      ii. Next: Appointee
   b. All Others, Auto process Empl Rehire fuzzy-match
      i. If Conditional and Emeritus OR no Rehire Eligibility or EXACT match found, Auto Routes to End Processes and Auto Email Notice to Spons. Superv.
      ii. If Rehire and/or a Fuzzy Match is found, Auto Routes to Final Review and Auto Email Notice to UPA Final Reviewer

Appointee

1. Receive notification via personal email
2. Complete personal info
3. Eligible to work in US?
    a. No: Skip to step 5, Complete liability screening questions
    b. Yes: Proceed to next step.
4. Provide SSN; Citizens and Permanent Residents
5. Complete liability screening questions.
6. Attestation
7. Submit
    a. Auto Email Notice to UPA Final Reviewer
8. Auto process EmplID Fuzzy Match and Rehire Eligibility Check. Proceed to Final Review.

Final Review (recruit team)

1. Guest Affiliate or Volunteer – Proceed to next step.
    All Others –
    a. Review EmplID Fuzzy Match and Rehire results
    b. Proceed to Next Step
2. Concerns to review?
    a. No – Proceed to next step
    b. Yes – Investigate and document findings, then proceed to next step
3. OK to Proceed with Rehire?
    a. Yes, Guest Affiliate or Volunteer: proceed to next step
    b. No, Guest Affiliate or Volunteer: Denied. Inform department contact and/or HR Partner.
    c. Yes, All Others: Skip to Execute step.
4. Initiate CBC process
5. Review CBC Results
6. OK to Proceed?
    a. No: Denied. Inform department contact and/or HR Partner.
    b. Yes: Next step.
7. Execute
8. Appt Executed (Empl ID created, IF NEEDED). Auto Email Notice to Spons. Superv.

End

1. Auto update PeopleSoft HR Job Data
   a. PeopleSoft Table created for finance journal entries – Department Fees Charged (if applicable)
   b. Proceed to next step
2. Account (SSO) Created
3. Email Created (if applicable)
4. Percepio file feed available
5. Canvas access
6. Perceptive Content files routed
7. Department Fees Charged (if applicable).

End of training and reference guide. Back to Top.