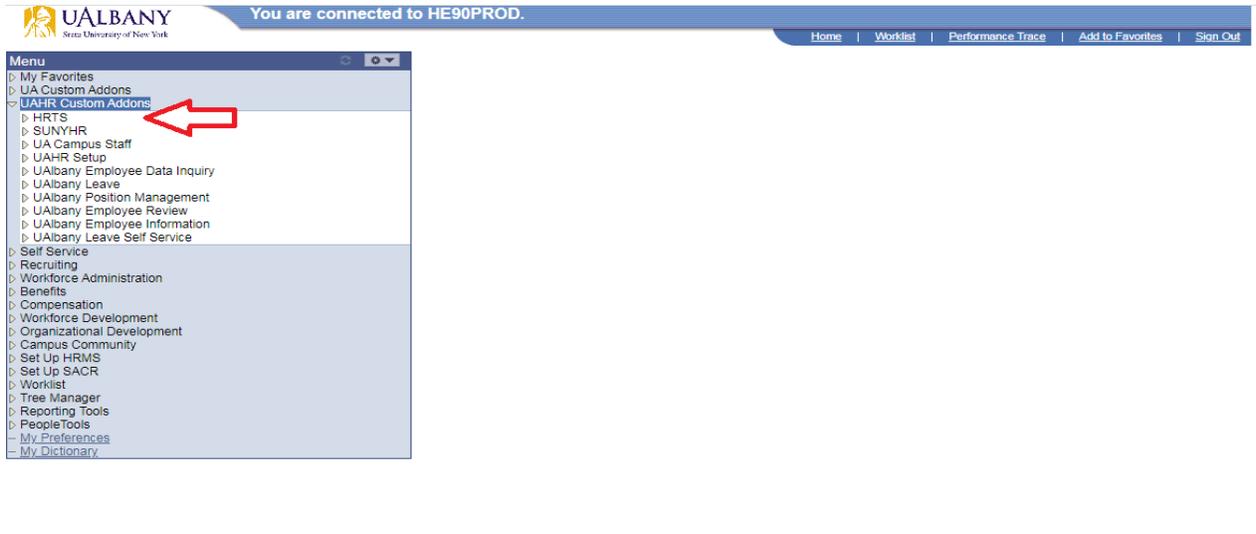


Welcome to the Human Resource Transaction System (HRTS)

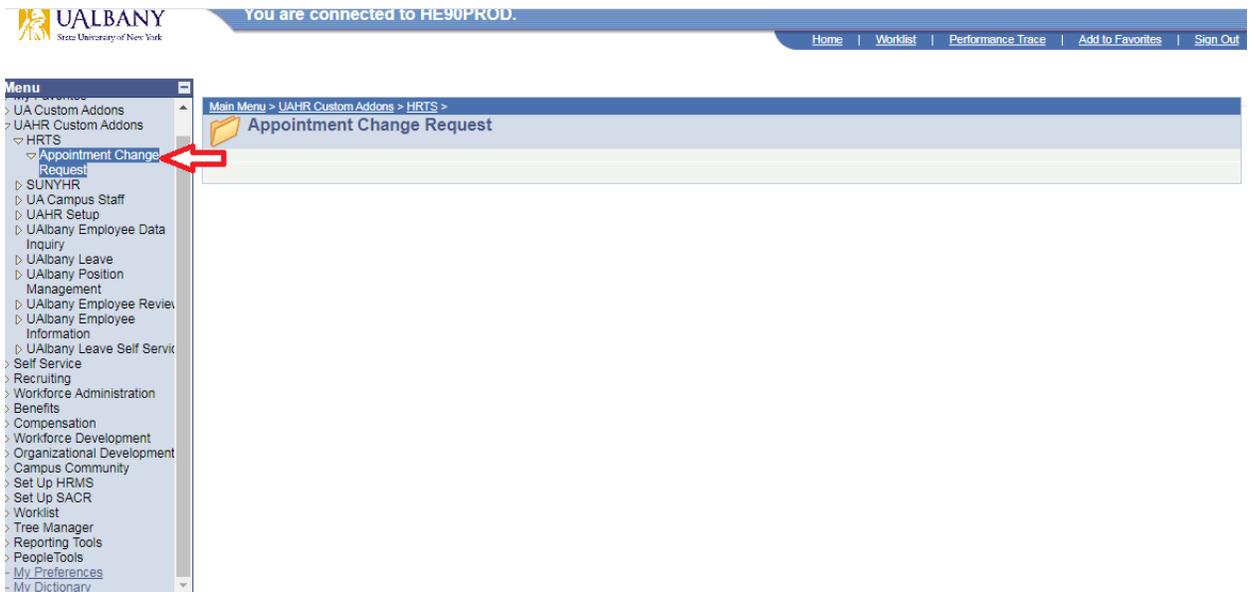
This system is now used for appointment change requests, replacing the former paper system for these types of requests.

To log onto HRTS go to www.albany.edu/ias

Click on UAHR Custom Addons and then HRTS.

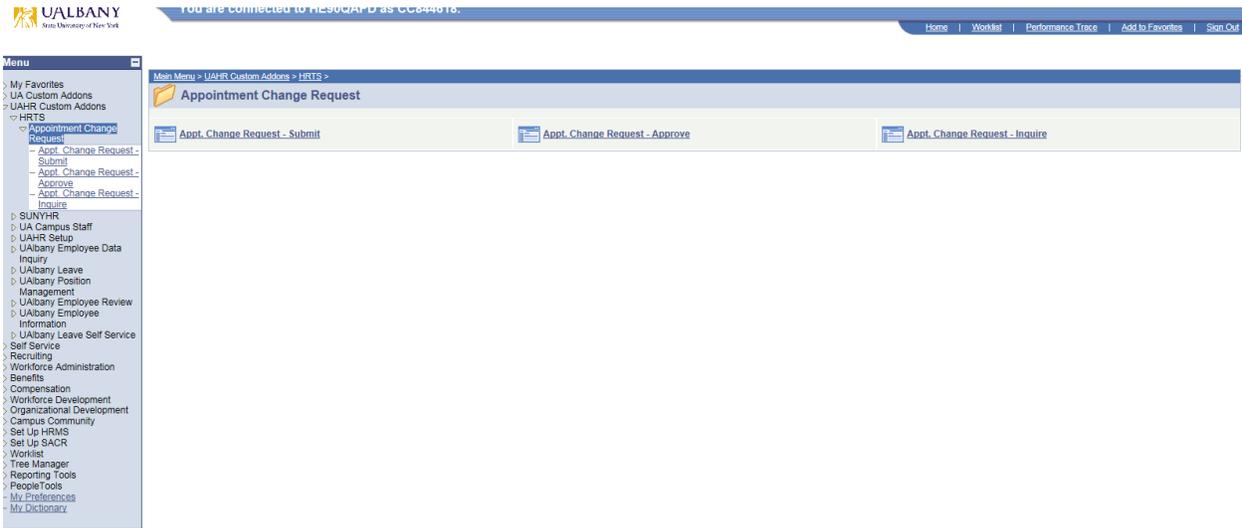


Click on Appointment Change Request.



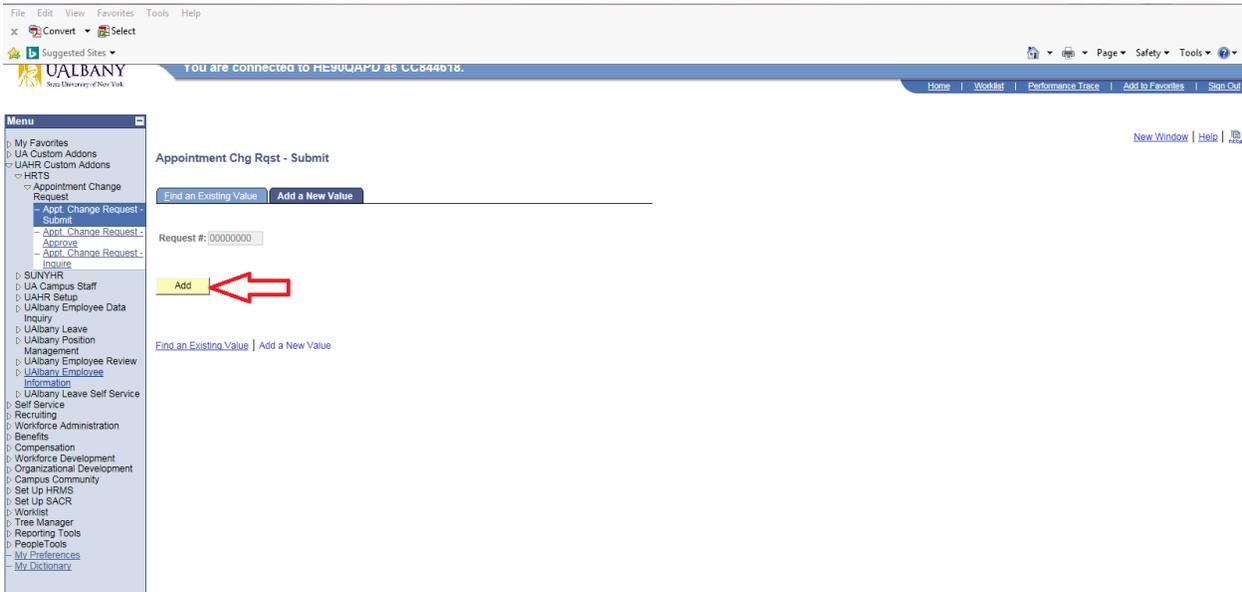
From there you can select one of three options- Inquire, Submit and/or Approve, depending on your access level.

- An approver has access to all three of these options.
- Submitters only have access to submit or inquire.



Submit a new appointment change request by clicking on “Appt. Change Request-Submit” and then clicking on the “Add” button.

You can also click “Add” to get instructions for using the system.



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You are connected to HR90QAPD as CC844018.

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- SUNYHR
- UA Campus Staff
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- UAlbany Leave Management
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- Self Service
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Instructions Appointment Change Request Attachments

Appointment Change Request* Instructions

(Internet Explorer or Chrome are Recommended Browsers)

Required fields to SAVE or SUBMIT a request: Emplid, Request Type, Effective Date

- Choose the primary **Request Type** for the action
- A separate request must be submitted for each action with a different effective date
- Actions for a fixed period must include an **End Date**
- Retirements & Resignations must include **Last Day on Payroll** as well as employee notice letter as attachment

CURRENT employment data will display upon selection of employee.

In the **CHANGE** column, **Account** section and/or **Course** section, update any data element that is changing as part of the request.

Comments and Attachments can be added by any user as required or to provide further details/explanation of request.

If a **FUTURE** change action is pending, Future data= YES

SAVE a request if it is not ready to be submitted.
SUBMIT will move the request to the next approver level for review and action, the submitter can no longer make changes.
APPROVE means the transaction has support to move to the next level of review and action. All Approvers at a given level will receive an email notification when a request is pending action.
 Human Resources has **FINAL APPROVAL** of all personnel transactions. Notification of final action will be emailed to submitter.

***ACTIONS NOT AVAILABLE FOR ONLINE SUBMISSION**

- Hiring of employees from another unit outside your division or school/college - complete HRM2
- Hiring of employees outside of department but within division or school/college can be requested at the Dean or VP level.

Appointment change request is available on the second tab.

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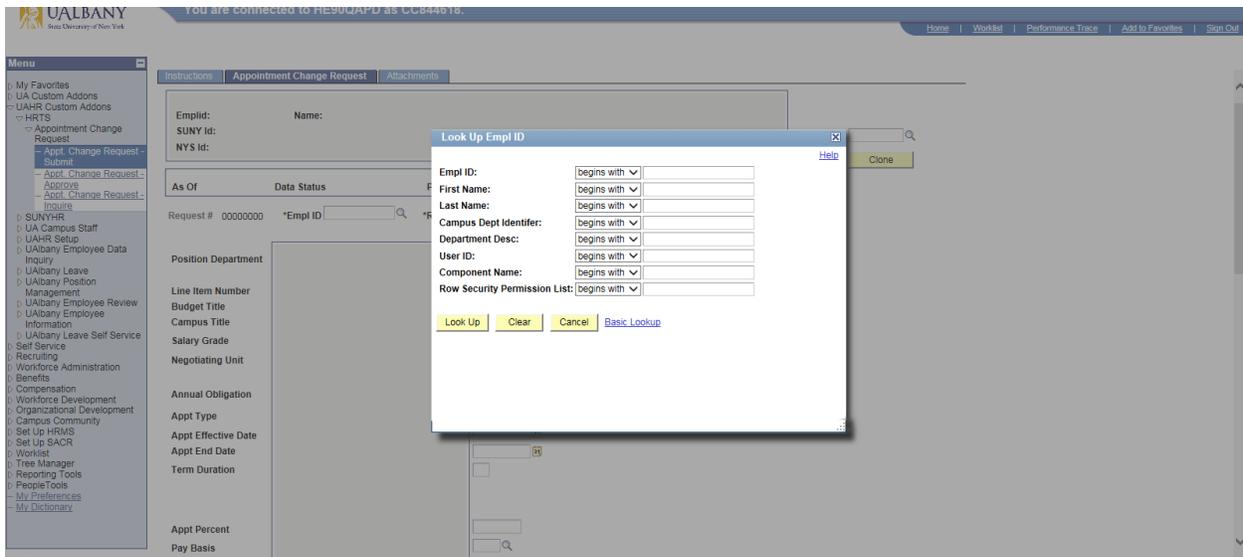
***ACTIONS NOT AVAILABLE FOR ONLINE SUBMISSION**

- Hiring of employees from another unit outside your division or school/college - complete HRM2

For existing employees you can now choose the employee by clicking on the magnifying glass icon to the right of the *Empl ID field. A search box will open and you can search for the employee in any of the search fields including Empl ID, First name, Last name, Campus Dept Identifier, Department Desc, User ID, Component Name, and/or Row Security Permission List.

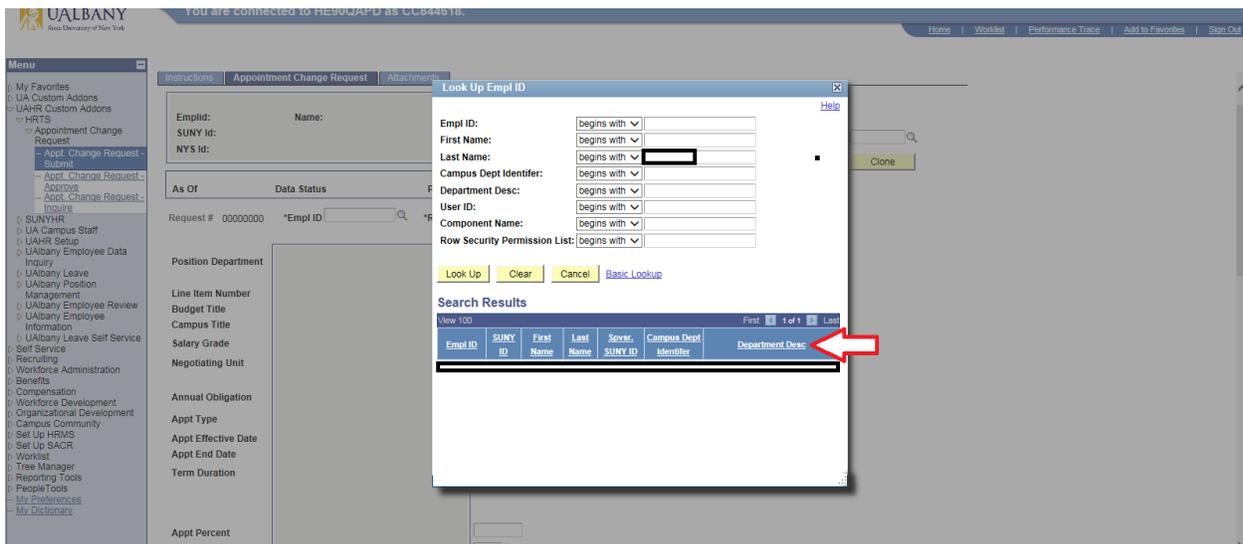
Click on "Look Up" to search for the employee after you have entered info into the field of your choice.

- Your access is limited by your permission level in the system.

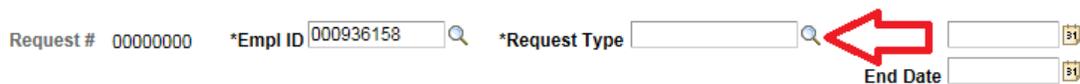


Search results will appear on the box at the bottom of the “Look Up” Box.

- Results can be filtered by clicking on the heading of the search result field you want to search by.



Once you choose the employee you want to change the appointment for, click on the magnifying glass icon to the right of the *Request Type field.



Click on “Look Up” to view a listing of all request types.

Look Up Request Type Help

Description:

Request Type:

[Basic Lookup](#)

Search Results

view 100 First 1-22 of 22 Last

Description	Request Type
Appointment: Extend Temp Appt	TEMPEXT
Appointment: Term Renewal	TERMRENEW
Appt Change: Add/Subtract Course	COURSECHG
Appt Change: Appt Status (Temp/Term/Perm/CTNG)	APPTSTATUS
Appt Change: Base Salary	SALARY
Appt Change: FTE %	WORKPCT
Appt Change: Obligation	OBLIGATION
Appt Change: Reclass or Promotion	POSITIONCHG
Appt Change: Stipend	STIPEND
Appt Change: Summer/Winter Salary (for Faculty)	SUM/WIN
Appt Change: Tenure Clock	TENURECLK
Data Change: Campus Address/Phone	CAMPADDR/PHONE
Data Change: Campus Title	CAMPTITLE
Data Change: Funding	FUNDING
Data Change: Schedule/Shift/Pass Days	WRKSCHED
Data Change: Supervisor	SUPERVISOR
HR Void: FOR HR use ONLY	HRVOID
Separation: Nonrenewal of Term Appt	NONRENEW
Separation: Resign external	RESIGNEXT
Separation: Resign internal	RESIGNINT
Separation: Retire	RETIRE
Separation: Termination of Non-Term Appt	TERMINATION

Choose the option that best describes the action you would like to complete.

- Request types appear in alphabetical order.
- You can only choose one request type but you'll be able to make other necessary changes once you enter the best suited request type.
- Once you choose a request type it will appear in that field.

You'll be required to enter the EMPID, request type and effective date for all requests.

- The other fields only need to be completed if they are changing.
- If this is a temporary action, you'll be required to enter an end date.

Request # 00000000 *Empl ID *Request Type *Eff Date End Date

Once you enter these fields, click "Save" at the bottom.

- Clicking "Save" will save your work so you can come back and further add or edit at a later time if you are not completing the action at this time.
- **Clicking "Save" does not submit your request!**

Please note there is an Attachment tab at the top of the request screen.

- You can add any attachments in this tab.
- Some request types require an attachment. For instance, if the request type is a resignation, please attach the resignation letter in this tab.

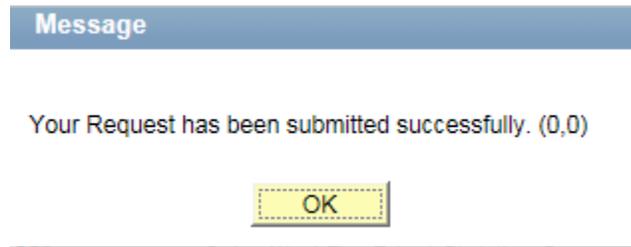


Any additional comments can be added in the comments section at the bottom of the page.



When you have completed the request, click "Submit" at the bottom of the page.

- The request will then be submitted to the next person in the approval process.
- **Once a submitter submits their request, they will be unable to make any further changes to the request!**
- You'll then see a message that states "Your Request has been submitted successfully."



Workflow boxes will then appear at the bottom of your screen.

- The workflow boxes track the progress of a request.
- The workflow box shows the workflow status of a single employee if you only have one request in progress.
- If you have several requests in progress, you'll see a listing of names of those whom you have request entered. Click on the name of the employee to view the request status and/or the workflow boxes for that request.



Once you have submitted a request you can go to the Inquire workflow box to look into what has been submitted and its current progress in the approval process.



Click the inquire box to look up a request by first name, last name, etc.

- You will only have access for employees within your department/supervision hierarchy.
- Submitters will only be able to view what they have already submitted.
- Approvers will see only the items pending approval in their pending section (workflow box).
- Once approvers approve an action, the item will no longer appear in the approve section.
- The inquire box allows you to see all actions taken on a request so far as well as the current status.

Appointment Chg Rqst - Inquire

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Request # begins with

Search Advanced Search

Search Results

Request #	Eff. Date	Request Type	Approval Status	HR Status	Department	First Name	Last Name	Budget Title	Employment Title	DEPARTMENT	SCHOOL	DEPARTMENT DIVISION	Last Updated	Updated By
00000015	01/01/2020	POSITIONCHG	Pending	(blank)	Human Resources Management			Staff Associate P		OHRM		FIN & ADMIN	01/22/2020 4:19PM	
00000016	02/01/2020	TEMPEXT	None yet	(blank)	Human Resources Management			Staff Associate P		OHRM		FIN & ADMIN	01/22/2020 4:27PM	
00000019	01/01/2025	RETIRE	Pending	(blank)	Human Resources Management			Staff Associate P		OHRM		FIN & ADMIN	01/27/2020 11:10AM	

- In this section, you can alphabetically sort the column by clicking on the column heading. You can also filter by clicking any heading on the column.

Appointment Chg Rqst - Inquire

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Request # begins with

Search Advanced Search

Search Results

Request #	Eff. Date	Request Type	Approval Status	HR Status	Department	First Name	Last Name	Budget Title	Employment Title	DEPARTMENT	SCHOOL	DEPARTMENT DIVISION	Last Updated	Updated By
00000015	01/01/2020	POSITIONCHG	Pending	(blank)	Human Resources Management			Staff Associate P		OHRM		FIN & ADMIN	01/22/2020 4:19PM	
00000016	02/01/2020	TEMPEXT	None yet	(blank)	Human Resources Management			Staff Associate P		OHRM		FIN & ADMIN	01/22/2020 4:27PM	
00000019	01/01/2025	RETIRE	Pending	(blank)	Human Resources Management			Staff Associate P		OHRM		FIN & ADMIN	01/27/2020 11:10AM	

- Not yet= saved but not yet submitted
- Pending= awaiting approval so unable to view as currently in the process between submit and HR approval
- Denied= This request has been denied by either approvers or Human Resources

Once you submit a request, the approver(s) will receive an email letting them know they have a new pending request.

- Approvers may want to designate a filter to put all requests into a separate folder for review.
- Groups with several approvers may also want to filter and/or set up a separate mailbox for these pending requests to better manage the workflow and ensure more than one approver does not take action on the same request. This will help to better manage work between multiple approvers at the same level.
- These emails will come from the address HRTS@albany.edu

Once the approver(s) approve a request, it will be sent to Human Resources for final approval.

If Human Resources approves the request, no further action is necessary. The approval status will be changed to approved.

If Human Resources denies the request, the submitters and approvers will receive an email that the request has been denied.