# New Appointment – Faculty

This New Appointment process document will cover how to **start a New Appointment eForm** to recommend new faculty appointments of assistant professors, lecturers, visiting and summer faculty ranks. There is a different guide that covers how to start a new appointment eForm to recommend new appointments of professor and associate professor ranks.

Please note: There is not a pre-approval section built into this form for Faculty ranks. Please continue to use the current business process of reaching out to DOF Academic Affairs to secure pre-approval before starting this form.

<table>
<thead>
<tr>
<th>Getting to PeopleSoft</th>
<th>Log into PeopleSoft at <a href="https://www.princeton.edu/selfservice">https://www.princeton.edu/selfservice</a></th>
</tr>
</thead>
</table>

| Key Message:          | On the landing page of PeopleSoft, select **Manager Self Service** from the dropdown at the top of the screen. |
Find the New Appointment eForm Tile

On the Manager Self Service Homepage, find and click on the **New Appointment eForm** tile.

Choose Approach

- AHIRE
- Other

There are two ways to start a New Appointment.

If the candidate has applied through AHIRE:

- Use the **Start New Appointment – AHIRE** link to start the form.
  
  ![Start New Appointment - AHIRE Link]

- This will take you to a page where you can search for, and select, the candidate you would like to appoint.
  
  ![Search for Candidate]
Once selected, you will be taken into the form and any available information on the candidate will be pre-populated into the form.

If the candidate has NOT applied through AHIRE:

- Use the **Start New Appointment - Other** link to start the form.

  This will take you directly into the form.

**Left Hand Menu**

Once the form starts, the left-hand navigation menu will collapse. To regain access to the menu items, expand the menu using the side tab.

**Rank Selection**

On the first page, use the dropdown to select the rank the candidate should be appointed at.
At any time, you can click the **Save** button to save your progress and return to the form later.

Click the **Next** button to continue.

### Initial Candidate Information

On the next page, enter initial information on the candidate in the fields provided.

An asterisk at the beginning of a field's label indicates the field is required to continue.

Click the **Next** button to continue.
<table>
<thead>
<tr>
<th>Appointment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>On the Appointment Information page, you may enter the &quot;<strong>Search Authorization #</strong>&quot; if you have one. Otherwise, start by entering the <strong>Appointment Start Date</strong> and, if prompted, the <strong>Appointment End Date</strong>.</td>
</tr>
<tr>
<td>Choose the <strong>Home Department/Academic Unit</strong> from the lookup provided (or simply type the department number, if known.)</td>
</tr>
<tr>
<td>Toggle the next set of Yes/No sliders appropriately for the appointment; additional fields will appear as needed to prompt you for information.</td>
</tr>
<tr>
<td>If the appointment is joint with other departments, you can enter up to two <strong>Joint Departments</strong>. This will automatically add approvers to the approval workflow for the form. The home department’s approvals will be secured first; the form will then route to the chair/director/dean of Joint Department 1, and then Joint Department 2, for approval.</td>
</tr>
<tr>
<td>(Note: Some questions will only appear for specific ranks.)</td>
</tr>
</tbody>
</table>
| Appointment Information: Compensation Information | Complete the segment by entering the appointment’s **Field of Specialization/Area of Study**.

| Duty Time / FTE Worksheet | Fill in the “**Annual 9 Month FTE Salary $**”. (Summer ranks will not have this field.)

Then click the **Duty Time / FTE Worksheet** button to complete the compensation segment.

Faculty ranks will see the Salary amount carried over from the previous page. You can change it here, if needed.

To complete the Worksheet:

- Start by using the “**Term**” field dropdown to choose a term.
- Then use the “**Type**” field to choose a teaching responsibility type.
- Fill in the “**Description**” and “**FTE Fraction**” for this teaching responsibility (FTE Fraction should be 0.5 or less)
• Use the **Select Chartfields** button to enter the first line of funding
  o On the Select Chartfields page, use the prompt fields to fill in the chart string
  o Click the OK button to return to the Worksheet

  ![Select Chartfields](image)

• Complete the chartfield row by entering a value in the “Percent %” or “Amount $” field. They will calculate each other.

• To add additional chartfield rows, use the + button at the end of the existing chartfield row.

• To remove any chartfield rows you have added, use the – button at the end of the row.

---

**Duty Time / FTE Worksheet:**

Complete the Duty Time / FTE Worksheet:

• To add more teaching responsibilities for the term, use the **Add Responsibility** button, found under the bottom-right corner of the existing responsibility's box.

![Duty Time / FTE Worksheet](image)

• To remove any of the teaching responsibilities you have added, use the **Delete Responsibility** button, found at the top-right of the responsibility's box.
To add another term (not available for Summer appointments,) use the **Add Term** button, found under the bottom-right corner of the existing term’s box.

- The “**Copy From Previous Term**” link can be used to copy down the values from the first term defined. (Note that you will need select the new term.)
- To remove a term that you have added, use the **Delete Term** button.

Once the worksheet is complete, use the **Done/Submit** button at the top-right corner of the worksheet to complete your entry and return to the Compensation segment.

<table>
<thead>
<tr>
<th>Complete Appointment Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Summer ranks:</td>
<td></td>
</tr>
<tr>
<td>• Click the <strong>Next</strong> button to continue</td>
<td></td>
</tr>
<tr>
<td>• For Summer ranks:</td>
<td></td>
</tr>
<tr>
<td>• The <strong>Actual Salary Total $</strong> will be populated from your worksheet entry.</td>
<td></td>
</tr>
</tbody>
</table>
• Populate the **Number of Summer Months**

![Image of form with fields for Summer Months and compensation information]

• Note: make sure the number of months matches the duration between the start and end dates that you have entered.

• Click the **Next** button to continue

### Department Vote

![Image of Department Vote form]

When applicable, the Department Vote page will be presented for entry. Rows will automatically appear for the 1, 2, or 3 departments that were selected on the previous page. Fill in any rows you have vote information for. Click the **Next** button to continue.

### Request Candidate

In this next step, you will be triggering a request for Personal and Self-Identifying Information to the Candidate. As a reminder, you can save the form if you prefer to continue later.
<table>
<thead>
<tr>
<th>Information: Candidate Contact Indicator</th>
<th>Set the “Request Candidate Personal Data and Self-Identification Information?” slider to ‘Yes’.</th>
</tr>
</thead>
</table>

(If you skip this step, you will be required to provide the Candidate's personal information, such as SSN and Date of Birth.)

<table>
<thead>
<tr>
<th>Request Candidate Information: Candidate Information</th>
<th>Review the fields in the Candidate Information segment and make any changes needed before the request is generated.</th>
</tr>
</thead>
</table>

| Request Candidate Information: Candidate eForm | Click the *Send Request to Candidate* button to generate the request to the Candidate. |
Once it has been generated, the button will be disabled and you will see a status and form ID listed.

The Candidate eForm Status will be in “Request Sent – Waiting” status until the Candidate responds, at which point it will change to “Completed”.

The “Override – No Candidate eForm” field should not be toggled unless needed to bypass a Candidate's response.

**Attachments**

At this point, please refer to the checklists on the DOF website - [https://dof.princeton.edu/checklists](https://dof.princeton.edu/checklists)

To add supporting documents for this appointment, use the **Upload** button on the first row in the file attachments segment.

NOTE: Only PDFs can be attached to this form.
- In the pop-up window, use the **My Device** button to open the file explorer and select your PDF.

![File Attachment](#)

- Then click the Upload button to attach the file. (Or use the Clear button to go back and choose another file from your device.)
- Once the upload is complete, press the **Done** button at the top-right corner to complete the attachment and close the pop-up.
- Select a description of your attachment from the drop-down.

To add another attachment, click the **Add** button below the attachment grid.

To delete an attachment row you have added, use the **Delete** button on the row.

To view an attachment, use the **View** button on the row.

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is a “<strong>Comment</strong>” box provided if you would like to add any comments to this form. These comments will appear to everyone who approves or views this form.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the <strong>Save</strong> button to save the form. You will not be able to submit this request until the Candidate has completed their form. Once that has happened, you will receive an email notification, at which point you will be able to continue the New Appointment request.</td>
</tr>
</tbody>
</table>
Continuing the transaction

When you receive the email notification, there will be a link included to take you back to your New Appointment request so you can continue.

Click this link. If you were not already logged into PeopleSoft, you will be taken to the login page so that you can log in first.

Update New Appointment: Candidate Information, Appointment Information and Department Vote

Once the form has loaded, you can review and update fields on the Initial Candidate Information page, the Appointment Information page, and the Department Vote page, if needed.

On each page, click the Next button to continue.
On the Request Candidate Information page, you will see that the Candidate eForm Status is now “Candidate Completed”. You now have the option to submit this form.

Just like previously, you can now
- Add any applicable attachments.
- Add any applicable comments.

When ready, click the Submit button to route this form for approvals.
On the **Results** page, you will see confirmation that you have successfully submitted your form and where it has routed for approval.

**The View Approval Route** button can be used to see where the form is currently routed to (the step labeled ‘Pending’) and where else the form may go for approvals.

You will be notified when certain approvers have approved and will also be notified when the form has been fully approved.
To see the status of your form at any time, you can use the **View an eForm** link on the New Appointment eForm tile.

If changes need to be made to an existing form (that has not yet gotten its final approval), the **Update an eForm** link can be used.

If you want to make revisions after a form has been fully approved and data has been written to PeopleSoft, please write to dof@princeton.edu.