NORTHWESTERN UNIVERSITY
Position Data Form

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Previous Funding

Perc	Fund	FN Dept	Project	Act	Prog	Chart Field	Account	Start Date	Stop Date

Authorization Name(Print)	Authorization Name(Signature)	Phone	Date

Department of Human Resource
Northwestern University
720 University Place
Evanston Campus

NORTHWESTERN UNIVERSITY
Appointment Form

Form Print Date: Record Number: 25

Employee Name: 26
Print last name first, first name, middle intitial

University ID No: 27

Job Data

Last Action Effective Date: Action: Reason:

Work Location HR. Status:

Effective Date: 28

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Action	Reason	Action	Reason	Action	Reason

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Approver:

Authorization Name (Print)	Authorization Name (Signature)	Phone	Date

Position Data/Appointment Form
Fields and Definitions

Position Data Form

(1) University Title	The official university Job Title related to this position, corresponding to the Job Code *(#7)*; this title is used when posting a job opening to eRecruit and displays as the primary title in the Online Directory. *Any new position or change in University Title must be approved by HR Compensation (for staff), the Office of the Provost (for faculty) or the Office for Research (for research staff/faculty) before submission.*
(2) Position Number	The eight-digit position number assigned by myHR. If a new position is being created, leave this blank.
(3) Incumbent	The name of the employee currently in (or entering into) this position.
(4) Effective Date	The date on which the requested Position action should begin. Leave blank *only* when extending the Position End Date.
(5) Action / Reason Codes	The Action and Reason Codes that correspond to the change that is being requested; the Action will always be "POS" but the Reason will vary. *Refer to the **Action/Reason Code Matrix** for all codes and descriptions.*
(6) Position Status	• "**A**" (Active) – the position is filled or approved to be posted • "**I**" (Inactive) – the position is not available
(7) Job Code	The six-digit Job Code identifies the official job title; this code correlates to the University Title indicated in (1) above. *Refer to the **Job Code Matrix** for a complete listing of Job Codes.*
(8) Department Title	The Department Title is usually the same as the University Title. In rare cases, departments may request an additional, more specific title for a staff or faculty position (e.g. a University Title of "Program Coordinator 2" might have a Department Title of "Student Outreach Program Coordinator"). *All Department Title requests must be approved by HR Compensation (for staff), the Office of the Provost (for faculty) or the Office for Research (for research staff/faculty).* The official University Title (1) will always be listed in the online directory, posted in eRecruit, and used for official University business.
(9) HR Department ID	The six-digit HR DeptID for the department that maintains control of the position. *Refer to the **HR Department ID** list for all DeptIDs.*
(10) Standard Hours	The number of hours per week that the employee typically will work: • Regular Faculty - **37.5** • Adjunct and Occasional Faculty – *use the ACA Adjunct Calculation* • Biweekly staff – **37.5, 40,** or another value with approval of HR Compensation • Monthly staff – **37.5** • Temporary staff - **40** • Work-Study & Graduate Students – **12** • Unpaid Positions - **1**
(11) Reports To	*This field is no longer used or updated. It will default to the Department Manager for the position.*
(12) Location	The four-digit Location Code denoting the physical location of the position on campus. This code is used in conjunction with Room Number *(#32)* to determine the address displayed in an employee's Online Directory listing. *Refer to the Location Code list for all available codes;* departments requiring an additional code for a new building or office location should contact myHR Help.
(13) Position End Date	If the position will end on a specific date, enter that date here. Unless it is absolutely certain that the position will never be used in the future for another employee, the position should have an Indefinite End *(see #14)*.
(14) Indefinite End	Check this box if the position does not have a specific end date. Note that positions may be reused and modified at any time; for this reason, it is recommended that most positions be "indefinite."
(15) Comment	*Optional:* include any relevant information regarding the change being made to the position.

(16) Position Type	The three-letter code that defines the position: • "**STF**" (staff) • **"FAC**" (faculty) • "**STU**" (student) • "**NON**" (unpaid position *or* NRSA Post-Doc)
(17) Position Category	A three-letter code that further refines the type of position listed in #16 (e.g., EXM for exempt monthly staff employees, ADJ for adjunct faculty, etc.). *Refer to the **Position Type/Category** list for all codes.*
(18) Scheduled Pay Periods	The number of paychecks the employee receives in one calendar year: • **"12"** - most regular faculty, exempt staff, and graduate students • **"26.1"** - most biweekly staff • **Blank -** May be left blank for graduate students, short-term appointments, and non-benefits-eligible positions • Early Start Faculty and Non-exempt Staff may have different pay periods.
(19) Percent Full Time	Percent full time is used to calculate benefits and must be completed for all benefits-eligible monthly-paid positions. *Complete this field only for regular monthly-paid faculty and staff positions; enter "0" for biweekly and graduate student positions.*
(20) Tenure Track	For faculty positions only; indicate if this is a tenure track position: • "**N**" (no) • "**Y**" (yes)
(21) Salary Admin Unit	The Salary Administration Unit (SAU) is a 6-digit HR DeptID indicating the department responsible for budgeting the position's salary and processing annual merit increases. For graduate students, this should be the HR DeptID for the department which owns the position. Check with your School Administration Office for the SAU for faculty and staff.
(22) Max Head Count	The maximum number of employees that can actively hold this position at the same time: • "**1**" – all regular faculty, staff, and most other positions should have a head count of one • "**35**" **–** some positions, including department-administered graduate students, may have a max of 35
(23) Budgeted Salary	The total amount budgeted for the position's payroll for the entire fiscal year. This information is indicated on Position Management reports and used in annual budget planning.
(24) Funding Distribution	The department or grant account chartstring(s) that will be charged for the position's payroll. This section should only be used when creating a new position or if the funding department is not deployed. *All other funding changes will be ignored and must be entered into myHR directly by the department.*

Appointment Form

(25) Record Number	If you are using a blank form, indicate the Job Record number you are adding for the employee here. If the form is pre-printed, ensure the correct Record is listed.
(26) Employee Name	For new employees, enter the full legal name using Last Name, First Name and Middle Initial (if available). *Do not include titles or degrees.*
(27) University ID Number	For individuals new to the University (have never held a job and have never been a student), leave this field blank – the number will be assigned by myHR. All existing employees will have numbers pre-printed into this field. When hiring a new employee, use the **Northwestern Job Summary** page in myHR to determine if the individual already has an ID number from past student or employee affiliation with Northwestern. If so, enter that number.
(28) Effective Date	The date on which the requested appointment transaction(s) should take effect. You may enter up to three different transactions (using different dates and codes) on one form. Changes may be pre-dated or post-dated as necessary; if a retroactive change impacts an employee's payroll, the back-pay will be calculated and paid out on the next available pay cycle for that employee.
(29) Action/Reason Codes	The Action and Reason codes corresponding to the appointment changes being made. *Refer to the **Action/Reason Code Matrix** for all codes and descriptions.*

(30) Position Number

If the appointment transaction concerns hiring or rehiring into a new or additional position, enter the relevant Position Number. If the request is accompanied by a new position, enter “New” into this field.

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(31) Expected Leave Return Date

The expected return date for an employee on a leave of absence.

This field is required when placing an employee on a paid or unpaid leave. This date may be updated at any time during the employee’s leave by submitting a new form with the Leave Extension code (DTA/LOA).

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(32) Suite or Room No

The room number that should appear in the Online Directory for the employee. If no room number is entered, it will default to the room number for the Location Code listed on the Position Data side *(#12)*.

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(33) Pay Group

Indicates which type of payroll process the employee belongs to:

- “**MOF**” (monthly faculty)
- “**MON**” (monthly staff)
- “**BIR**” (biweekly regular staff)
- “**BIT**” (biweekly temporary staff)
- “**MGW**” (graduate students)
- “**NMF**” (Northwestern Medical Group clinical appointment for Feinberg faculty)
- “**OTH**” (unpaid)

Pay groups are associated with the specific Job Code *(#7);* refer to the **Job Code Matrix** for the correct code to use.

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(34) Compensation Rate

The dollar amount the individual should be paid. For monthly-paid employees, enter the *monthly* amount; for biweekly-paid employees, enter the *hourly* amount.

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(35) Tenure Status

For faculty positions only; indicate if position is tenure track:

- “**N**” (non-tenure track)
- “**T**” (tenure track)
- “**A**” (attained tenure) – used when the position is provided to an employee who already has achieved tenure

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(36) Tenure Review Date

The Tenure Review Date should be entered as September 1^{st} of the year the employee will be reviewed for tenure.

Tenure clocks begin September 1^{st}; academic faculty are typically reviewed in the 6^{th} year of their tenure clock; medical faculty are typically reviewed in the 9^{th} year. Contact your school’s Faculty Affairs office for more information.

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(37) Expected Tenure Begin Date

The date that a tenure-track faculty member is expected to be granted tenure, assuming a favorable tenure review. This is typically September 1^{st} of the year *after* the employee’s Tenure Review Date *(#36)*.

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(38) Appointment End Date

The projected last work day for an appointment with a defined length. If the appointment does not have a specified end date, it may be Indefinite instead *(#39)*.

If an Appointment End Date is submitted, the employee will stop receiving pay and will be terminated following this date. The Appointment End Date *or* the Funding Stop Date (whichever occurs first) controls budget encumbrances.

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(39) Indefinite End

Check this box if the appointment does not have a specific end date; the employee will not be terminated until a termination transaction is submitted.

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(40) Annual FTE Salary

The amount the employee would earn in one calendar year if working in this appointment only for 100% of the time:

- Monthly Employees – (Monthly Salary x 12) ÷ Percent Full Time
- Biweekly Employees – Hourly Salary x 1957.5

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(41) Contract Period

The number of months the employee is contracted to work during the 12-month academic year. Required for paid faculty and staff; not used for graduate students.

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(42) Appointment Indicator

Used for Faculty only. Provides additional detail about the nature of the appointment and is used at the discretion of the individual school. Values include:

- “**Academic Full Time”**
- **“Academic Part Time (<50)**
- **“Academic Part Time (>=50)”**
- **“Courtesy”**
- **“Instructor – Academy”**
- **“Instructor – Accompanist”**
- **“Instructor – Chamber Music”**
- **“Instructor – Opera”**
- **“Lecturer – Continuing”**
- **“Lecturer – Year to Year”**
- **“Teaching Post Doc”**
- **“Teaching Pre Doc”**

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(43) Annual Renewable

Optional; used for Faculty only. The Annual Renewable checkbox is used to capture appointments for non-tenure eligible faculty that are reviewed and renewed yearly. This field is used primarily by Feinberg and the Law School.

(44) Exclude Merit Base Salary

Optional; used for Faculty only. By default, all appointments are included when calculating an employee's annual merit increase. If the salary on this appointment should *not* be considered when the merit is assigned, the reason should be entered here:

- "**Administrative**"
- "**Named Professorship**"

(45) Academic Appointment Type

Used for Faculty academic (teaching) appointments only.

- "**P**" (primary) – this appointment is the faculty member's has primary teaching responsibility
- "**J**" (joint) – an additional teaching appointment for which the department pays into the employee's salary
- "**S**" (secondary) – an additional teaching appointment for which the employee does not receive additional pay

(46) Primary Role

Use this box to indicate if this appointment is the employee's primary job responsibility:

- "**Y**" (yes)
- "**N**" (no)

All paid individuals must have a Primary Role; for faculty and staff with multiple jobs, the one which represents the majority of the workload should be Primary.

(47) Short Notice

Check this field if the requested action is a termination, and the employee has not provided the required amount of notice.

Departments must consult with their HR Consultant before using this field. This information is not stored in myHR but will become part of the employee's personnel file.

(48) Check Addr Code

The four-digit code denoting the on-campus mailing address for employee checks. This code is used for manual check prints, travel reimbursement checks, and year-end W-2 forms.

*This code is **not** the same as the Location Code (#12); refer to the **Check Address Code** list for all available codes.* Departments requiring an additional code for a new building or office location should contact myHR Help.

Employee Approvers/Supervisors

The following approvers must be indicated on the Appointment Form for new hires. After the employee is active, approved myHR Administration users may update the following approvers electronically in myHR using the "Expenses Supervisor" and "Reports To" pages.

(49/50) Expenses Supervisor

The 8-digit position number *(#49)* and name *(#50)* of the individual who will be responsible for approving this employee's electronic expenses reimbursements in NUFinancials.

Backup approvers for expenses may be added by authorized myHR users on the "Expenses Supervisor Backups" page.

(51) Conflict of Interest

The position number and name of the approver for the employee's annual Conflict of Interest disclosure.

(52) Performance Evaluation

The position number and name of the individual responsible for an employee's performance excellence and annual evaluation.

(53) Training

The position number and name of the individual who will approve the employee's training requests submitted through myHR.

Note: Approval is required only when a drop fee or registration fee is associated with a course and the employee enters a chartstring for charges.

(54) Time Card/Leave Accrual

The position number and name of the individual who will approve the employee's Kronos leave accruals (monthly staff/librarians) or Kronos Time Cards (biweekly staff).

If the employee reports to multiple supervisors, only one may be entered as the primary approver. Additional backup (secondary) approvers can be entered by authorized myHR users on the "Kronos Backup Supervisors" page.