

# Appointment Status Details

## Overview

The Appointment Status Details screen is used to capture the employee's current, future and historical appointment status records. When an employee has an appointment Personnel Action Request (PAR) completed, standard defaults exist for the employee's current and future appointment statuses (for employee's being appointed to probationary status). Edits can be made during the PAR process as well as through direct entry.

## Definitions

*The following fields are shown in the Appointment Status Details Overview screen:*

- Effective Date – the effective date of the appointment status record.
  - Each time an appointment status record is created, the effective date populates based on the effective date of the appointment action being performed.
- End Date – the last day of each appointment status record.
  - There will always be an active appointment status record. When a new record is created, the previous record is end dated the day before the new record (based on the effective date of the new record).
- Appointment Status – the two-digit appointment status code for each appointment status record.
- Status Expiration Date – the expiration date for each appointment status record.
- Overlap Indicator – indicates when employees are overlapped with an X.
- Overlap Date – the date the employee began overlap.

Appointment Status Details->Overview						
	Effective Date	End Date	Appointment Status	Status Expiration Date	Overlap Indicator	Overlap Date
<input type="checkbox"/>	04/14/2015	12/31/9999	03	12/31/9999		
<input type="checkbox"/>	04/14/2014	04/13/2015	02	04/13/2015		
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*The following fields are shown in the details section:*

- Effective Date – the effective date of the appointment status record. The effective date is populated in the following ways:
  - Defaults to the effective date of a PAR action that has been acted upon.

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- Defaults to the day after the probationary status record expiration date when creating the permanent status record (for employees appointed with probationary status).
  - During direct entry, a new record can be created by updating the end date and status expiration date on an existing record with 12/31/9999 as the end date.
- End Date – The end date is based on the last day of each appointment status record.
  - Defaults to the status expiration date (based on the probationary period in Org Management) when appointing an employee to probationary status with an appointment PAR.
  - Defaults to the status expiration date (12/31/9999) when appointing an employee to permanent, exempt or any other status.
- Shared Indicator – indicator is marked based on the employee's position being flagged as shared. Field is not available for direct entry (updates must be made in Org Management).
- Overlap Indicator – indicator is marked either during the PAR process or during direct entry when the employee's Full Time Equivalent (FTE) exceeds the position FTE. Field is available for direct entry.
- Overlap Date – the overlap date is based on when the employee began overlapping positions. The date must be within the begin and end date of the appointment status record. Field is available for direct entry.
- Appointment Status – indicates the employee's appointment status which is created during appointment (except for lateral and legislative directed transfer actions). Edits can be made during the PAR process as well as through direct entry (once a record is established). Appointment status codes include:
  - 02 - Probationary
    - Valid for positions in employee subgroups 01, 04, 06, 07, and 31. The period is no less than 12 months and no greater than 18 and is assigned on the Position Attributes screen (infotype HRP9121)
  - 03 - Permanent
    - Valid for positions in employee subgroups 01, 04, 06, 07, and 31 once probationary period is successfully completed
  - 09 - Exempt
  - 10 - Trainee - Recruitment
  - 11 - Trainee - Co-Op
  - 12 - Trainee - Vocational Rehab
  - 13 - Trainee - Return to Work
  - 14 - Trainee - Blind Services
  - A - OPS Temporary Appointment
  - B - OPS - Seasonal
  - C - OPS Board Members
  - D - OPS Student Or Graduate Asst
  - F - OPS Part-Time Academic Employment

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- G - OPS – Contracted Physicians
  - I - OPS – Institutional Clients
  - J - OPS – Health Care Practitioners
  - K - Americorps
- Status Expiration Date – indicates the expiration date for the record selected. Field is prepopulated for probationary appointments based on the number of months selected in the probationary period field on the position (position attributes screen). Field can only be edited if the probation extension date is updated (probationary status employees only). For all other appointment status types, the status expiration date defaults to 12/31/9999.
- Probationary Start Date – date is populated based on the effective date of a probationary record. Field is not available for update and is only displayed when an employee is in probationary status.
- Student Type – drop down selection available when status change or appointment PAR is being acted upon or through direct entry. Student type codes include:
  - 1 - DCT/CBE
  - 2 - Cooperative Education
  - 3 - Intern
  - 4 - Other High School or Vocational School
  - 5 - Other College
- Probation Extension Date – date is entered by an HR user if probation is extended. Updates must result in a date greater than the current appointment expiration date, but no more than 18 months from the probationary start date. After updating and saving the extension date, the employee's end date will also be updated.

Appointment Status Details->Details

Effective Date	04/14/2014 *	End Date	06/13/2015 *
<input type="checkbox"/> Shared Indicator			
<input checked="" type="checkbox"/> Overlap Indicator		Overlap Date	04/14/2014
Appointment Status	02 - Probationary *	Status Expiration Date	04/13/2015 *
Student Type		Probationary Start Date	04/14/2014
		Probation Extension Date	06/13/2015

Edit Save Cancel

### Authorization

Users with a security role of A, H, U, X and Y will be able to update the appointment status screen through direct entry. Managers can update appointment status records when completing a PAR action only.

### Process Steps

The appointment status screen can be updated during the completion of an appointment PAR action or can be updated through direct entry (HR roles codes only). Updates can only be made to the current or future dated record.

### PAR Process

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When acting upon a PAR that appoints a Career Service employee to probationary status, the status expiration date will automatically populate based on the probationary period assigned to the position in Org Management. Edits are in place that forces the probationary period to be between 12 and 18 months. Upon saving the appointment status screen during the PAR process, a future dated permanent status record will be created with an effective date the day following the expiration date of the probationary record and with a 12/31/9999 end date. For example, if the employee has a probationary status expiration date of 10/02/2015 saved during the PAR, a new record with permanent status will be created with a begin date of 10/03/2015 and an end date of 12/31/9999. When completing an appointment PAR with lateral or legislative directed transfer reason code, the employee will maintain their current status.

When acting upon a PAR for an employee with exempt or any type of OPS status, the status expiration date will default to 12/31/9999. Edits are in place to prevent the assignment of probationary status for SES/SMS and OPS employees.

### Direct Entry

Updates can be made to the employee's appointment status screen through direct entry. Direct entry updates can only be made by users with an HR security role code. Probation Extension Date can only be updated if an employee is currently in a probationary status. Extensions should not result in a probationary period lasting beyond 18 months. Any update made to the employee's current probationary appointment status record will result in the future dated permanent status record being updated.

### Placing Employees in Trainee Status

When acting upon a PAR for an employee resulting in an employee being placed in trainee status, the following steps should be taken:

- Update the status to the appropriate trainee status when acting upon the PAR. Update the end date and appointment status expiration date to 12/31/9999. This will create a training appointment status record for the employee.

The screenshot shows the 'Appointment Action->Appointment Status Details->Details' screen. It contains the following fields and values:

Field	Value
Effective Date	01/12/2015 *
End Date	12/31/9999 *
Shared Indicator	<input type="checkbox"/>
Overlap Indicator	<input checked="" type="checkbox"/>
Appointment Status	10 - Trainee - Recruitment *
Student Type	
Overlap Date	
Status Expiration Date	12/31/9999 *
Probationary Start Date	
Probation Extension Date	

At the bottom, there are buttons for Edit, Save, Cancel, and Next.

- Once it is time to move the employee from trainee status to probationary status, go to the employee's trainee appointment status record with an end date of 12/31/9999. Through direct entry, select edit and update the appointment status expiration date to the last day the employee is in trainee status and select save (do not change the appointment status type at this point).

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**Appointment Status Details->Details**

<b>Effective Date</b>	01/12/2015 *	<b>End Date</b>	12/31/9999 *
<input type="checkbox"/> Shared Indicator		<b>Overlap Date</b>	
<input type="checkbox"/> Overlap Indicator		<b>Status Expiration Date</b>	06/11/2015 *
<b>Appointment Status</b>	10 - Trainee - Recruitment *	<b>Probationary Start Date</b>	
<b>Student Type</b>		<b>Probation Extension Date</b>	

[Edit](#) [Save](#) [Cancel](#)

- After making the change to the trainee appointment status record, go to the newly created trainee status record (effective date will be the probationary start date for the employee).

**Appointment Status Details->Overview**

	Effective Date	End Date	Appointment Status	Status Expiration Date	Overlap Indicator	Overlap Date
<input checked="" type="checkbox"/>	06/12/2015	12/31/9999	10	12/31/9999	X	01/12/2015
<input type="checkbox"/>	01/12/2015	06/11/2015	10	06/11/2015		01/12/2015

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- Through direct entry, update the status to probationary and update the status expiration date to the appropriate probationary end date (date combination must result in a probationary period of 12 to 18 months) and select save.

**Appointment Status Details->Details**

<b>Effective Date</b>	06/12/2015 *	<b>End Date</b>	12/31/9999 *
<input type="checkbox"/> Shared Indicator		<b>Overlap Date</b>	
<input type="checkbox"/> Overlap Indicator		<b>Status Expiration Date</b>	06/11/2016 *
<b>Appointment Status</b>	02 - Probationary *	<b>Probationary Start Date</b>	
<b>Student Type</b>		<b>Probation Extension Date</b>	

[Edit](#) [Save](#) [Cancel](#)

- After setting the probationary period appointment status record, the permanent record will be created automatically.