

Banner 9 PEAFAC: Tenure/Rank Process for Faculty

PEAFAC is the banner form that maintains faculty rank and tenure data. Within this form the following information is stored: Primary Activity (i.e. Instructional), Faculty Type (i.e. Adjunct Faculty), Academic Title and Institution Credit (Contract Load, which is used in the overage process).

Step 1: PEAFAC Form

1. Go to the **PEAFAC** form and enter the UID of the faculty member you are looking to update the rank/tenure for. If you do not know the UID click on the ellipse (three dots) to open the search menu. Select **List for Employee**. Enter the last name, first name or both and press F8 or click **Go**. If you do not know the spelling you can conduct a wildcard search by entering % symbol after or before the first few letters of the name.

2. Review the information in the Faculty Action Tracking block. The following information should already be provided: **Primary Activity, Institution Credit, Faculty Type, Academic Title, Begin Date**. If needed, update the Academic Title to reflect the correct title. **PLEASE NOTE:** Academic Title is the job title, **NOT** the Rank.

Step 2: Rank Records

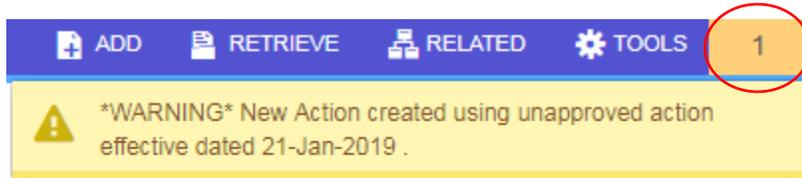
The screenshot shows the Faculty Action Tracking (TSTR) interface. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The 'TOOLS' menu is circled in red. The 'Rank Records' option is also circled in red. The main form area contains fields for 'General' information, including 'Primary Activity' (Instructional), 'Primary Discipline', 'Institution Credit', 'Faculty Type' (ADJ - Adjunct Faculty), 'Compensation Level', 'Original Appointment' (Begin Date: 01-SEP-2016, End Date:), 'Birth State or Province', 'Academic Title' (Adjunct Faculty - Spring), 'Emeritus Status', 'Terminal Degree', and 'AAUP Member'.

1. Click on **Tools** and select **Rank Records**
2. **PLEASE NOTE: NEVER** change or delete existing information.
3. To enter new information go back to the **Tools** menu and select **New Date**
 - a. Enter the **New Action Date**- this is the date of the transaction
 - b. Enter the **Proposed Effective Date**- this is the start of the academic year regardless of which semester the faculty will be teaching in.

The screenshot shows the 'Create New Action PEAFACT 9.3.11 (TSTR)' dialog box. The 'New Action Date' field is set to 12-SEP-2019 and the 'Proposed Effective Date' field is set to 03-SEP-2019. The 'OK' and 'Cancel' buttons are visible at the bottom.

4. You will receive an error message that states "**WARNING New Action created using unapproved action effective dates 21-Jan-2019.**" Please disregard this message and click into the yellow box with the number to remove the message. Continue on to the form.

MESSAGE TO DISREGARD:



5. Update the **Rank** by entering the code or clicking the ellipse to select the correct code from the table. Then click on **OK**.

The **RANK RECORDS** form includes the following fields:

- This Action Date * 12-SEP-2019
- Initial Record
- Rank 5 ... Instructor (This field is circled in red)
- Rank Effective Date 03-SEP-2019

Rank Rule Form (PTRRANK)

Criteria

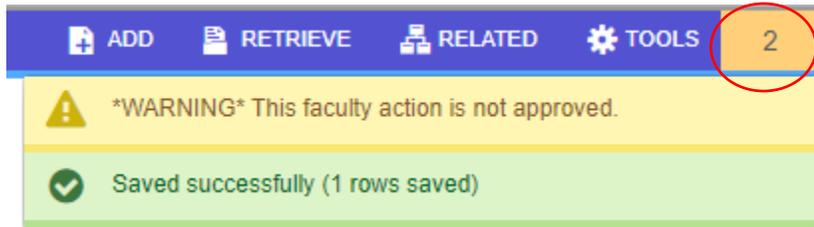
Instit Rank	Description	Rank Code	Activity Date
1	Professor	1	28-Oct-2004
2	Associate Professor	2	28-Oct-2004
3	Assistant Professor	3	28-Oct-2004
4	Lecturer	5	10-Jan-2006
5	Instructor	4	10-Jan-2006
6	Distinguished Professor	1	25-May-2006
7	Visiting Professor	9	06-Nov-2004
8	Professor Emeritus	9	28-Oct-2004
9	University Professor	1	08-Jul-2009
A	Visiting Assistant Professor	9	23-Jun-2009

Navigation: 1 of 2 | 20 Per Page | Record 1 of 25

Buttons: Cancel, OK

6. Click **Save** located in the bottom right hand corner.
7. Disregard the warning that will appear on the screen stating “**WARNING: This faculty action is not approved.**”

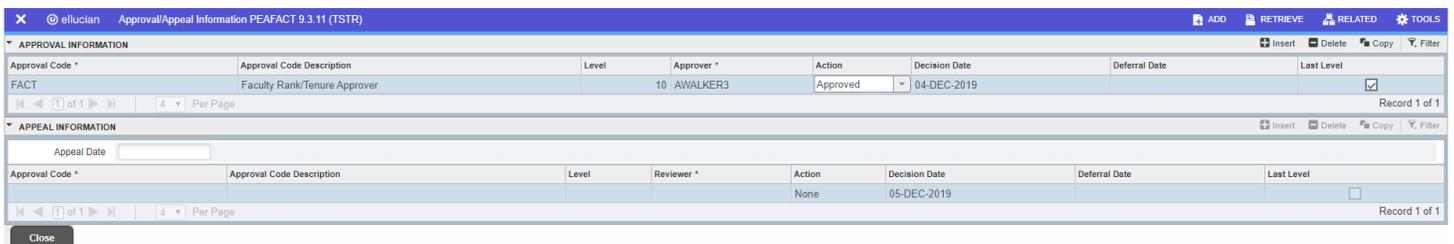
MESSAGE TO DISREGARD:



8. Click on **Next Section** twice (located at the bottom left hand corner of the screen) to update the **Decision for Rank** field to an **Approved** Status. If it already states **Approved** no action is required.



9. On the **Approval Information** block enter **FACT** or click on the ellipse and select **FACT- Faculty Rank/Tenure Approver** as the **Approver Code**. The **Approval Code Description** and **Level** will auto populate.
10. Click on the ellipse in the **Approver** field to select the correct approver from the dropdown list. This should be the Faculty Rep.
11. Check off **Last Level**.
12. Click **Save**.
13. Lastly, click the **Close** button to get out of the screen.



14. To enter comments go to **Tools** and select **Comments**

Step 3: Appt or Tenure Records

Click on **Start Over** and press **Go** to return to the **Faculty Action Tracking** block of the **PEAFACT** form. Then go to **Tools** and select **Appt or Tenure Records**

The screenshot shows the Faculty Action Tracking PEAFACT 9.3.7 (TSTR) interface. The top navigation bar includes buttons for ADD, RETRIEVE, RELATE, and TOOLS. The TOOLS button is circled in red. The main content area displays the 'FACULTY ACTION TRACKING' form with various fields for General information, Primary Activity, Primary Discipline, Institution Credit, Faculty Type, Faculty, Compensation Level, Original Appointment, Birth State or Province, Academic Title, and End Date. The right-hand menu is open, showing options like Search, ACTIONS, Refresh, Export, Print Screenshot, Clear Record, Clear Data, Item Properties, Display ID Image, Exit Quickflow, About Banner, and OPTIONS. The 'Appt or Tenure Records' option under the OPTIONS section is circled in red.

If employee is moving from a non-tenure track position to a Tenure track position, please note the instructions in **Appendix A**. For all other cases please follow the below:

1. Go to **Tools** and select **New Date**. Enter the below:
 - a. Enter the **New Action Date**- this is the date of the transaction
 - b. Enter the **Proposed Effective Date**- this is the start of the academic year regardless of which semester the faculty will be teaching in.

The screenshot shows the 'Create New Action PEAFACT 9.3.11 (TSTR)' dialog box. It has a title bar with the text 'Create New Action PEAFACT 9.3.11 (TSTR)'. Below the title bar, there are two date input fields: 'New Action Date' and 'Proposed Effective Date'. Each field has a calendar icon to its right. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

2. Ignore the warning message that appears by clicking into the yellow box with the number:

ADD RETRIEVE RELATED TOOLS 1

WARNING New Action created using unapproved action effective dated 21-Jan-2019 .

3. Update the information in the below fields and click save:
 - a. **Appt or Reappt Begin Date:** should be the current academic year.
 - b. **Effective Date:** should be the current academic year.
 - c. **Review Type:** click on the ellipse and select the current academic year
 - d. **Tenure Code:** click on the ellipse and choose the correct Tenure Code
 - e. If Tenured you must enter the **Tenure On** date which should be the current academic year.
 - f. Click **Save** and once again disregard the warning message.

Activity Date 11-Oct-2019 12:00:00 AM Activity User MOMARA **SAVE**

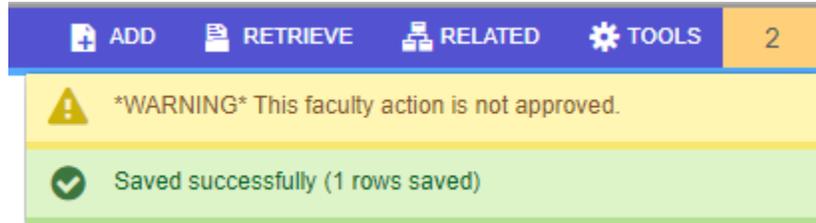
4. Next, to approve the Decision, click on **Next Section** twice. On the Approval Information block enter **FACT** or click on the ellipse and select **FACT- Faculty Rank/Tenure Approver** as the **Approver Code**. The **Approval Code Description** and **Level** will auto populate.
5. Click on the ellipse in the **Approver** field to select the correct approver from the dropdown list. This should be the Faculty Rep.
6. Check off **Last Level**
7. Click **Save**.

APPROVAL INFORMATION							
Approval Code *	Approval Code Description	Level	Approver *	Action	Decision Date	Deferral Date	Last Level
FACT	Faculty Rank/Tenure Approver	10	AWALKER3	Approved	11-OCT-2019		<input checked="" type="checkbox"/>

APPEAL INFORMATION							
Approval Code *	Approval Code Description	Level	Reviewer *	Action	Decision Date	Deferral Date	Last Level
				None	11-OCT-2019		<input type="checkbox"/>

8. Disregard the warning that will appear on the screen stating “**WARNING: This faculty action is not approved.**”

MESSAGE TO DISREGARD:



9. To add comments, click on the **Close** button then click on the **Tools** menu and select **Comments**.

Once these tasks are completed you have completed the Tenure/Rank process in Banner 9.

APPENDIX A.

Faculty member moving from non-tenure to tenure position

Follow the above steps **EXCEPT for Step 3**. Instead, follow the below instructions to update the Appointment and Tenure Records.

1. Go to **Tools** and click on **Appt or Tenure Records**.
2. When on this form you will see the most recent Appt/Tenure record. Click on **Next Section** twice to check whether or not the record has an approval status. If there is an approval status, change the status to **None**. Click **Save**. Then click on the **Close** button to return to the original form.

Approval Code *	Approval Code Description	Level	Approver *	Action	Decision Date	Deferral Date	Last Level
FACT	Faculty Rank/Tenure Approver	10	AWALKER3	None	11-OCT-2019		<input checked="" type="checkbox"/>

Approval Code *	Approval Code Description	Level	Reviewer *	Action	Decision Date	Deferral Date	Last Level
				None	11-OCT-2019		<input type="checkbox"/>

3. Put an end date on the current record and click **Save**.
4. Click on **Tools** and then select **New Date**.
5. Enter the **New Action Date**- this is the date of the transaction
6. Enter the **Proposed Effective Date**-first day of the academic year (regardless of their actual start date). Click **OK**.
7. Enter **Tenure Code** by clicking on the ellipse and choose the **Tenured** option.
8. Entered **Tenured on Date**.
9. Click **Save**.
10. Click on **Next Section** twice to confirm approval status is there. If not, enter the approval code information.
11. Check off **Last Level**.
12. Click on **Save**.
13. Continue following the above instructions in Step 3 to complete the **Appt or Tenure Records process**.