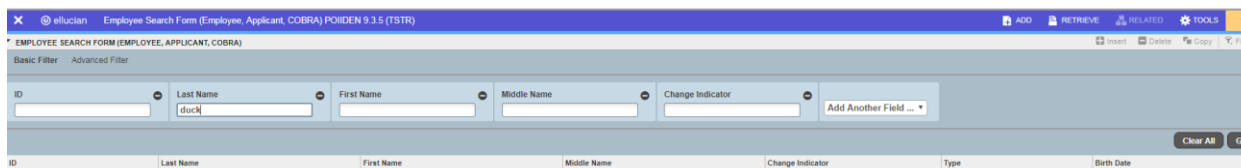
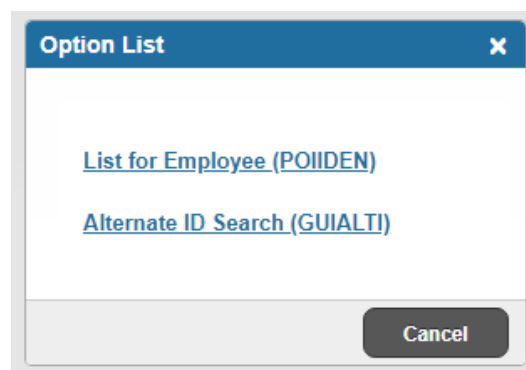
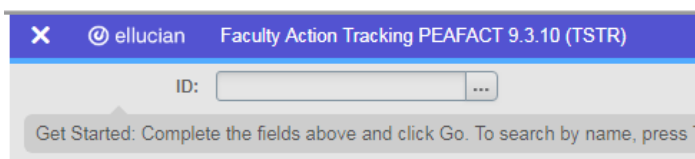


Banner 9 PEAFAC: Tenure/Rank Process for Faculty

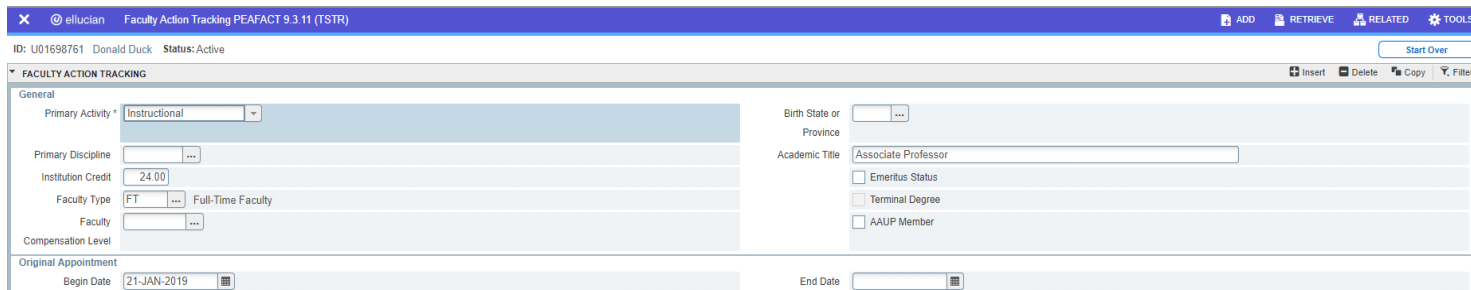
PEAFAC is the banner form that maintains faculty rank and tenure data. Within this form the following information is stored: Primary Activity (i.e. Instructional), Faculty Type (i.e. Adjunct Faculty), Academic Title and Institution Credit (Contract Load, which is used in the overage process).

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

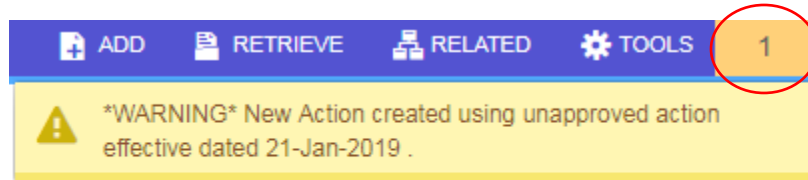
The screenshot shows the Faculty Action Tracking (PEAFAC) 9.3.7 (TSTR) interface. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The 'TOOLS' menu is circled in red. The 'Rank Records' option under the 'OPTIONS' section is also circled in red. The main form displays various fields for faculty information, including Primary Activity, Primary Discipline, Institution Credit, Faculty Type, Faculty, Compensation Level, Birth State or Province, Academic Title, Emeritus Status, Terminal Degree, AAUP Member, Original Appointment, Begin Date, and End Date.

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. It contains two date fields: 'New Action Date' with the value '12-SEP-2019' and 'Proposed Effective Date' with the value '03-SEP-2019'. Both fields have calendar icons to the right. At the bottom, there are 'OK' and 'Cancel' buttons.

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**.

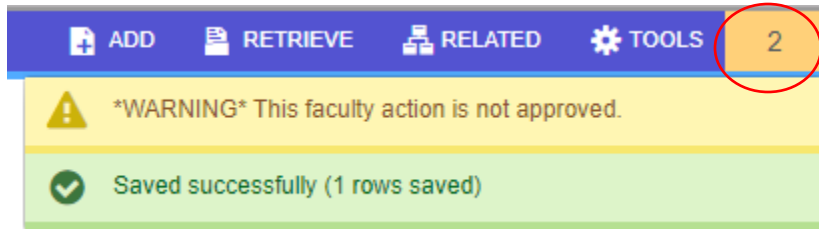
A form titled "RANK RECORDS" with a "Rank" section. It contains the following fields: "This Action Date *" with a date picker set to "12-SEP-2019", an "Initial Record" checkbox, a "Rank" field with the value "5" and an ellipse button, and a "Rank Effective Date" field with a date picker set to "03-SEP-2019". The "Rank" field and its associated ellipse button are circled in red.

A dialog box titled "Rank Rule Form (PTRRANK)" with a search bar and a table of rank codes and descriptions. The table has four columns: "Instit Rank", "Description", "Rank Code", and "Activity Date". The table contains 10 rows of data. Below the table is a pagination bar showing "1 of 2" and "20 Per Page". At the bottom right are "Cancel" and "OK" buttons.

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

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.

APPROVAL INFORMATION							
Approval Code *	Approval Code Description	Level	Approver *	Action	Decision Date	Deferral Date	Last Level
FACT	Faculty Rank/Tenure Approver	10	AWALKER3	Approved	04-DEC-2019		<input checked="" type="checkbox"/>
Record 1 of 1							

APPEAL INFORMATION							
Appeal Date							
Approval Code *	Approval Code Description	Level	Reviewer *	Action	Decision Date	Deferral Date	Last Level
				None	05-DEC-2019		<input type="checkbox"/>
Record 1 of 1							

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)' window. The top bar includes buttons for ADD, RETRIEVE, and RELATED, with the TOOLS button circled in red. The main area contains a 'FACULTY ACTION TRACKING' section with various input fields like Primary Activity, Primary Discipline, Institution Credit, Faculty Type, Faculty, Compensation Level, Birth State or Province, Academic Title, and Original Appointment. On the right, a sidebar menu lists various actions 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 a dialog box titled 'Create New Action PEAFACT 9.3.11 (TSTR)'. It contains two date input fields: 'New Action Date' and 'Proposed Effective Date'. Both fields have a calendar icon to the right. At the bottom are 'OK' and 'Cancel' buttons.

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.

APPT AND TENURE

Decision
This Action Date * 14-OCT-2019

Appt or Reappt Begin Date 01-SEP-2019

End Date 11-OCT-2019

☐ Initial Record

Decision None

Decision Date

Appointment
Effective Date 01-SEP-2019

Review Type

Next Review Date

Tenure
Review Type 19 2019-2020 Academic Year

Tenure Code E On Track

Tenure Status On-Track

IPEDS Contract Type (None)

Decision Deferred to Date

☐ Terminal Appointment

Previous Tenure Grant

Tenure Credit this Appt

Tenure FTE

Tenure Tracking
Begin Date 01-SEP-2019

Tenure On

Tenure Review Date

Record 2 of 2

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/Appeal Information PEAFACT 9.3.11 (TSTR)

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"/>

Record 1 of 1

APPEAL INFORMATION

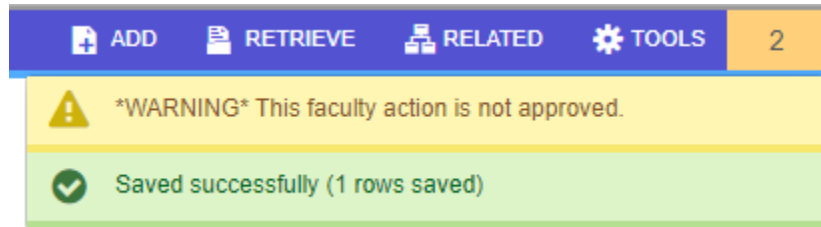
Approval Code *	Approval Code Description	Level	Reviewer *	Action	Decision Date	Deferral Date	Last Level
				None	11-OCT-2019		<input type="checkbox"/>

Record 1 of 1

Close

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.

The screenshot shows a web application interface for 'Approval/Appeal Information PEAFACT 9.3.11 (TSTR)'. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', 'TOOLS', and a user icon. The main content area is divided into two sections: 'APPROVAL INFORMATION' and 'APPEAL INFORMATION'. The 'APPROVAL INFORMATION' section contains a table with the following data:

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"/>

Below the table, there are navigation controls: '< 1 of 1 >', '4 Per Page', and 'Record 1 of 1'. The 'APPEAL INFORMATION' section is currently empty, showing only the 'Appeal Date' field. At the bottom left of the form, a 'Close' button is circled in red.

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**.