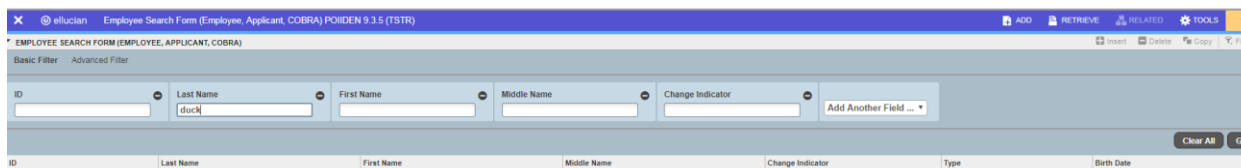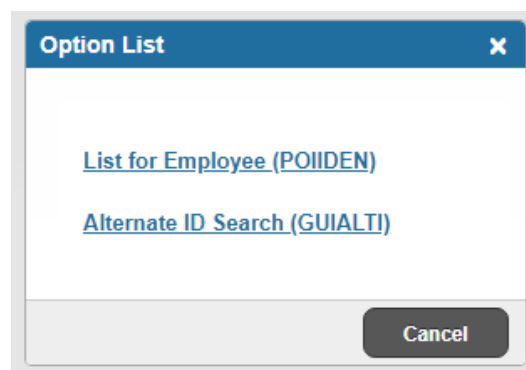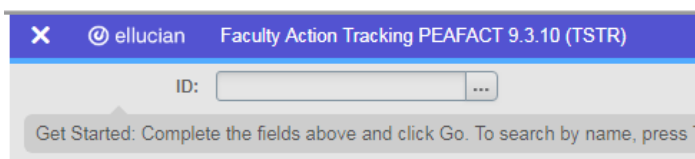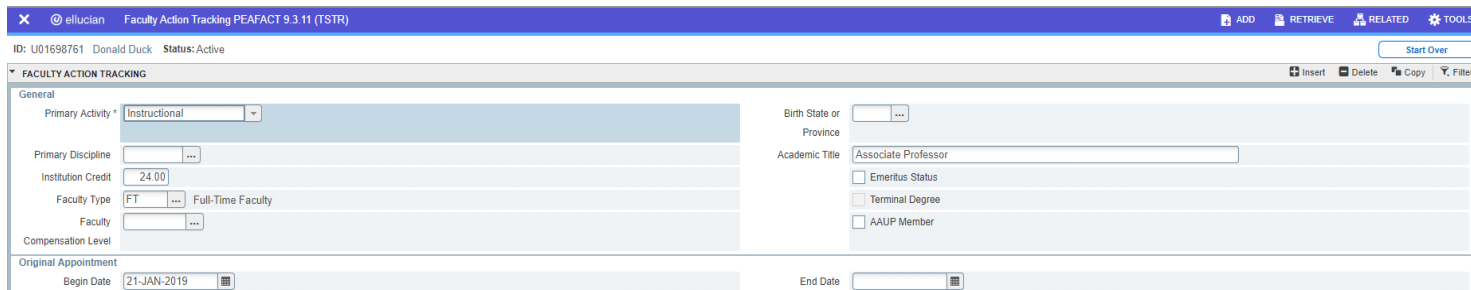# Banner 9 PEAFACT: Tenure/Rank Process for Faculty

PEAFACT 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: PEAFACT Form

1. Go to the **PEAFACT** 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.
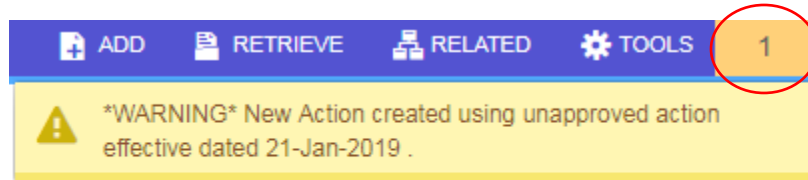
Step 2: Rank Records

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.

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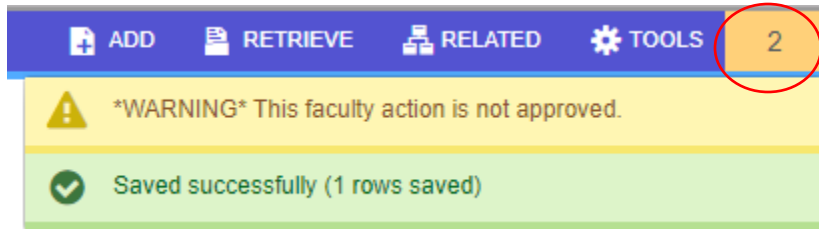
6. Click **Save** located in the bottom right hand corner.
7. Disregard the warning that will appear on the screen stating "**WARNING: This faculty action is not approved**."

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**

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**

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.

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

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.

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**.

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.

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.**