Congratulations Mass Appointment Verification

Each year, many Courtesy appointments are created. The Courtesy Mass Appointment Verification process will ensure that all active courtesy appointments are verified annually to identify those that still have an affiliation with Florida State University. All courtesy appointments not specifically identified for retention will be terminated in OMNI at the conclusion of the verification process.

This job aid outlines the basic steps for verifying data in the Courtesy Mass Appointment Verification process. Each active Courtesy appointment must be confirmed. You will be required to designate those that should **NOT** be terminated because of their continued active affiliation with Florida State University.

Department Managers and Department Representatives will need the `FSU_SS_MANAGER` role to complete the Mass process.
Department Representative Step 1

STEP 1: Go to Manager Self Service > Job and Personal Information.

STEP 2: Click FSU Mass Appointments > Mass Appointments: Courtesy.
STEP 3: Enter the department number of the Courtesy Appointment requiring review and click **Search**.

![Mass Appointments: Courtesy](image)

STEP 4: To retain the Courtesy appointment, you **must** uncheck the “Terminate” box.

<table>
<thead>
<tr>
<th>Appointment</th>
<th>More</th>
<th>Comments</th>
<th>Terminate</th>
<th>Empl ID</th>
<th>Rod</th>
<th>Name</th>
<th>Last Update</th>
<th>Action</th>
<th>Last Hire Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012345</td>
<td>1</td>
<td>Sally Seminole</td>
<td>07/29/2019</td>
<td>HIR</td>
<td>07/29/2019</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012346</td>
<td>0</td>
<td>Ronnie Renegade</td>
<td>01/09/2020</td>
<td>HIR</td>
<td>01/09/2020</td>
</tr>
</tbody>
</table>

NOTE: All Courtesy Appointments are set to “Terminate” initially.

STEP 5: Once you have reviewed and unchecked those that needed to be retained, click “Save” – this is located at the bottom of the screen.
Department Manager Step 1
This step is done only by the department manager and can be completed only after the system has been released to department managers.

Approvals: All Courtesy appointments that the Department HR Representative leaves selected for termination defaults to “Approve” initially. Uncheck “Approve” if the appointment should be retained. Add a comment indicating the correction required and/or the reason for the correction – comments are required for any non-approval action. The Department Representative will have a window of opportunity to make the appropriate adjustments prior to the final approval by the Department Manager. Please see the published timeline.

When a comment is recorded and the system re-opens for Department Representative correction, after the first Manager Approval cycle, the entry will be highlighted so the Department Representative is aware that a correction is required.

STEP 6: Go to Manager Self Service > Job and Personal Information.
STEP 7: Click **FSU Mass Appointments > MASS Appts: Courtesy Approval**

[Image of Manager Self Service interface]

**Mass Appt: Courtesy Approvals**

Enter any information you have and click Search. Leave fields blank for a list of all values.

- Find an Existing Value
- Add a New Value

**Search Criteria**

Search by: [Department] [begins with] [blank]

- Search
- Advanced Search

STEP 8: Enter the department number of the Courtesy appointments that require review and approval and click **Search**.

[Image of Mass Appointments: Courtesy interface]

**Mass Appointments: Courtesy**

Enter any information you have and click Search. Leave fields blank for a list of all values.

- Find an Existing Value

**Search Criteria**

Search by: [Department] [begins with] [013000]

- Search
- Advanced Search
STEP 9: Appointments set to terminate will automatically be marked as “Approve.” If the HR Department Manager wishes to retain the appointment, unselect Approve.

<table>
<thead>
<tr>
<th>Appointment</th>
<th>More</th>
<th>Comment</th>
<th>Approve</th>
<th>Terminate</th>
<th>Empl ID</th>
<th>Rcd</th>
<th>Name</th>
<th>Last Update</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012345</td>
<td>3</td>
<td>Sally Seminole</td>
<td>07/28/2015</td>
<td>DTA</td>
</tr>
<tr>
<td>2</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>000012346</td>
<td>0</td>
<td>Ronnie Renegade</td>
<td>01/20/2016</td>
<td>HIR</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012347</td>
<td>1</td>
<td>David Diffenbaugh</td>
<td>08/15/2017</td>
<td>HIR</td>
</tr>
<tr>
<td>4</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>000012348</td>
<td>1</td>
<td>William Westcott</td>
<td>03/20/2019</td>
<td>HIR</td>
</tr>
</tbody>
</table>

STEP 10: Add comments on the Comments tab describing reason(s) for retaining the appointment that need to be made. Comments are required for any Courtesy appointment action that is not approved.

<table>
<thead>
<tr>
<th>Appointment</th>
<th>More</th>
<th>Comment</th>
<th>Approve</th>
<th>Terminate</th>
<th>Empl ID</th>
<th>Rcd</th>
<th>Name</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012345</td>
<td>3</td>
<td>Sally Seminole</td>
<td>Retain - project has been extended</td>
</tr>
<tr>
<td>2</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>000012345</td>
<td>0</td>
<td>Ronnie Renegade</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012347</td>
<td>1</td>
<td>David Diffenbaugh</td>
<td>Retain - Dissertation Committee</td>
</tr>
<tr>
<td>4</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>000012348</td>
<td>1</td>
<td>William Westcott</td>
<td></td>
</tr>
</tbody>
</table>

STEP 11: Approve the Courtesy Appointments that need to be retained. Do not check the Approve box where adjustments are required.

<table>
<thead>
<tr>
<th>Appointment</th>
<th>More</th>
<th>Comment</th>
<th>Approve</th>
<th>Terminate</th>
<th>Empl ID</th>
<th>Rcd</th>
<th>Name</th>
<th>Last Update</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012349</td>
<td>1</td>
<td>Stephen Strozier</td>
<td>11/03/2017</td>
<td>HIR</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012348</td>
<td>0</td>
<td>Larry Longmire</td>
<td>10/05/2018</td>
<td>HIR</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>000012347</td>
<td>0</td>
<td>Bill Bellamy</td>
<td>12/15/2019</td>
<td>DTA</td>
</tr>
</tbody>
</table>
**STEP 12:** Once all appointments have been validated and comments have been completed, click **Save** – this is located at the bottom of the screen.

**NOTE:** Department representative will have a window of opportunity to review and update any changes prior to final approval by the department manager. Department Managers will need to approve any changes made by the Department Representatives in the final step. Check schedule for entry windows.
Department Representative Step 2

**STEP 13:** Go to Manager Self Service > Job and Personal Information.
STEP 14: Click **FSU Mass Appointments > Mass Appointments: Courtesy**.

STEP 15: Enter the department number of the Courtesy Appointment requiring review and click **Search**.
**STEP 16:** Review Required Changes requested by the department manager and make the appropriate updates. Any action that has not been approved will be highlighted in red for correction.

<table>
<thead>
<tr>
<th>Appointment</th>
<th>More</th>
<th>Comments</th>
<th>[ERP]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terminate</td>
<td>Empl ID</td>
<td>Rcd</td>
<td>Name</td>
</tr>
<tr>
<td>1</td>
<td>✔️</td>
<td>000012346</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>✔️</td>
<td>200032752</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>✔️</td>
<td>000112602</td>
<td>0</td>
</tr>
</tbody>
</table>

**STEP 17:** Once all requested changes have been reviewed and updated, click save.

![Save, Return to Search, Notify buttons]
Department Manager Step 2

STEP 18: Go to Manager Self Service > Job and Personal Information.

STEP 19: Click FSU Mass Appointments > MASS Appts: Courtesy Approval
**STEP 20:** Enter the department number of the Courtesy appointments that require review and click **Search**.

```
Mass Appointments: Courtesy
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: [Department ▼ begins with 013030] ▼

Search  Advanced Search
```

**STEP 21:** Department Managers will need to approve any additional courtesy appointment changes. Once final approvals have been made, click **Save**.

```
[Save]  [Return to Search]  [Notify]
```

**Questions?** For general questions about this procedure, email hr-courtesydocs@fsu.edu.