

FASA USER REFERENCE GUIDE SCHOOL OF MEDICINE SUPPLEMENT

Approver Workflow (School of Medicine Dean's Office approvers)

*Originators **MUST** name a School of Medicine Dean's Office Approver to every transaction. Select one appropriate to the transaction type:*

- Professoriate appointment modifications, resignations, terminations - Audrey Yau or Rebecca Robinson depending on the primary department
- Professoriate regular retirements, FRIP retirements, emeritus faculty recalls (FRIP & non-FRIP) - Ellen Waxman

Add additional approvers for the following actions:

- * FTE changes - Alex Obaya
- * Terminations - Ashley Klein

FYI Users who need to receive the transaction approval notification

*Originators **MUST** add Ann Bjelland of Faculty Compensation as an FYI User to every transaction for a candidate who is a University employee. (Faculty Compensation does not require notice for non-employee affiliates.)*

Use departmental business practice to determine whether to add other FAAs and the DFA as FYI Users.

If the transaction will result in PeopleSoft Job Workflow, add your Human Resources representative.

Approver Workflow (Other School Deans' Office approvers)

Dean of Research (for specified policy centers & institutes): Denise Hofer (dhofer@stanford.edu)

Earth Sciences: Sue Crutcher (crutcher@stanford.edu)

Engineering: Chris Eichar (ceichar@stanford.edu)

Graduate School of Business: Charlotte Toksvig (ctoksvig@stanford.edu)

Graduate School of Education: Tanya Chamberlain (tanyas@stanford.edu)

Humanities & Sciences: Sue Martin (suemartin@stanford.edu).

Law School: Amy Applebaum (amya@stanford.edu)

SLAC: Amy Rutherford (amyr@slac.stanford.edu)

Notifications

FASA sends four types of email notifications, all of which include a direct link to the transaction summary confirmation to an FYI User that s/he has been added to a transaction.

2. Transaction reassignment or a request for approval. Informs the recipient that a transaction has been assigned to him or her for attention.
3. One user's private comment about the transaction to another user. The recipient will be able to view the transaction. If the recipient is designated as a Contributor or an Approver for the transaction, he or she can edit it.
4. Transaction milestones, including:
 - School Dean Office approved / submittal to the Provost's Office
 - School Dean Office denied
 - Provost Approver approved / final approval of the transaction
 - Provost Approver denied

The transaction milestone notification contains few details; the recipient must click on the link in the message to access the transaction summary to obtain them.

Transaction Specific Instructions:

Add Appointment: Joint or Secondary [UPDATED]

1. Use these instructions also to renew a Courtesy or Secondary 0%FTE appointment for which the end date is not aligned with the end date of the primary department.
2. *Required attachment:* the department chair's memo to the faculty member confirming the details of the appointment.
3. *Start date:* no earlier than the first day of the next month.
4. *End date:*
 - a. *Joint appointment end date:*
 - i. if primary appointment is for a fixed term, must equal or occur before primary appointment end date.
 - ii. if faculty member has tenure or holds a continuing term (primary end date field is empty), do not enter an end date.
 - b. *Secondary appointment end date:*
 - i. if primary appointment is for a fixed term, must equal or occur before primary appointment end date.
 - ii. if faculty member has tenure or holds a continuing term (primary end date field is empty), must be five years duration or less.
5. *FTE:*
 - a. *Joint appointment:* requires two PeopleSoft position numbers with equal FTE for the primary and joint appointments.
 - b. *Secondary appointment:* no position number or FTE are required.

Add Appointment: Courtesy

1. *Required attachment:* the department chair's memo to the faculty member confirming the details of the appointment.
2. *Start date:* no earlier than the first day of the next month.
3. *End date:*
 - a. if primary appointment is for a fixed term, must equal or occur before primary appointment end date.
 - b. if faculty member has tenure or holds a continuing term (primary end date field is empty), can be five years or without an end date.
4. *FTE:* no position number or FTE are required.

Emeritus Recall (FRIP)

1. *Starting the FRIP retirement and Recall Action:* start the transaction in FASA after the faculty member's Notice of Intent to Retire has been submitted and approved by the department chair.
2. *Required attachments:* the draft offer letter for the recall appointment.
3. *Final approval of the draft offer letter:* financial review will conclude with return of the draft offer letter **after** the FRIP Agreement and Release has been signed by both the retiring faculty member and the Provost.

Emeritus Recall (non-FRIP)

Required attachment:

1. The draft offer letter is expected for the first recall appointment or any subsequent recall in which there is to be a change.
2. For a renewal that is continuous with a prior recall and in which there is to be no change. For recall appointments without salary, attach the department chair's memo to the recalled faculty member confirming the details of the appointment.

Appointment Extension: New Parent Extension

1. *Revised Tenure Deadline* (instruction #9): to be completed by Academic Affairs.
2. *Required attachment*: department must attach the New Parent Extension request form signed by the faculty member and the department chair. Academic Affairs will complete the tenure clock deadline calculation portion and replace the attachment in FASA.

Appointment Extension: Extension due to Other Reason

Required attachment: the department chair's memo to the faculty member notifying him or her of the extension request and containing the candidate's acknowledgment of it. If the faculty member's tenure clock will be impacted by the proposed extension, the chair's memo must also include the faculty member's acknowledgment that he or she will not acquire tenure by length of service.

Termination: Resignation

Required attachment: the faculty member's resignation letter.