CHANGE TRANSACTIONS JOB AID

In AXESS: Resources Tab > Postdoctoral Administrative Forms > Change Transactions
Any combination of changes – Appointment dates, Faculty, or Funding – can be processed in the same web form.

1. **To create a new Change Transaction, click "Add"**
   a. REQUEST TYPE BOX
      i. From the three change types listed, click the appropriate box for each change to be made
         1. The fields for each request type appear after the Request Type box is checked
   b. BIO DEMO BOX
      i. Student ID Field: Enter the student ID number, OR
      ii. Click the magnifying glass to "look up" the student ID
         1. In the Look Up Box enter the postdoc surname in the Last Name Field, click "Look Up"
         2. From Search Results, click the name of the postdoc
         3. The Bio Demo Fields are populated
   c. APPOINTMENT DATE CHANGE BOX
      i. New Appointment Start Date Field:
         1. DO NOT ENTER A DATE IN THIS FIELD FOR APPOINTMENT EXTENSIONS
         2. Enter a new start date only if the actual start date has changed, (i.e., a deferred start due to visa delays
      ii. New Appointment End Date (Extensions) Field: Enter the new appointment end date
      iii. Total Experience with Reappointment Term Included and Applicable Research Experience To-Date fields are auto-updated with new totals after you tab out of the new end date field
   d. NEW FACULTY SPONSOR INFORMATION BOX
      i. Faculty Sponsor ID Field: Enter the Faculty Sponsor ID number, OR
      ii. Click the magnifying glass to "look up" the Faculty Sponsor ID
         1. In the Look Up Box enter the faculty surname in the Last Name Field, click "Look Up"
         2. From Search Results, click the name of the Faculty Sponsor
      iii. Faculty Research Mentor Field: Repeat the above steps if there is a Research Mentor change
      iv. Comments Field: Enter any comments regarding the faculty change(s)
   e. NEW ANNUAL SALARY/FUNDING BOX
      i. Funding Description Fields: Enter a brief description in the appropriate field(s) – Salary, Stipend, Outside support
      ii. Amount Fields: Enter the funding amount(s), ensuring that the total (or combined total) meets or exceeds the Required Salary listed
   f. ADDITIONAL INFORMATION REGARDING TERMS BOX
      i. Enter any additional information regarding funding terms
   g. COMMENTS BOX
      i. Enter any comments for Approvers or OPA (comments are visible to all, including the postdoc)
   h. Click "Save" to save the form and return later; OR click "Submit" to route the form for approval
   i. An email notification is automatically generated to the Postdoc

2. **To search for a previously saved or submitted Change Form**
   a. From Postdoctoral Administrative Forms, click the "Change Transactions" radio button
   b. To search for all Change Forms, click "Search"
   c. To search for a specific Change Form:
      i. In the search criteria fields, enter the postdoc's First and Last Names, click "Search"
      ii. From Search Results, click the Transaction ID of the Change Form