

## CREATING A TENURED APPOINTMENT FOR ENDED PROBATION

Following are instructions to manually end a Probationary Appointment and add a Tenured Appointment. The manual method will be outlined first, followed by a process that is more automatic. The latter option requires some minimal table setup which is outlined as well.

Adding a Tenured Appointment is not as simple as changing the Appointment Type field from PROB to TENR. The PROB should be left in tact as a separate record for historical purposes.

The screenshot displays a software interface for managing appointments. At the top, there are tabs for 'Information', 'Positions', 'Add Items', 'Budget', 'Pay Sched', 'Deductions', and 'H...'. Below these are sub-tabs for 'Overview', 'Appointments', 'Snrty/Lngvty', 'Board Action', 'Certificates', 'Leave', 'Evaluations', and 'Courses'. A table shows appointment details:

Seq	Code	Tenure/Appointment Area	Type	Effective	End Date	Board Date	Rank	Senior.Date	Pos.Cla
01	TA	TEACHING ASSISTANT	PROB	01/12/1998	06/30/2001	01/06/1998		01/12/1998	CR

Below the table is a detailed form for the selected appointment. The 'Appointment Type' field is set to 'PROB' (Probationary). Other fields include 'Position Class' (CR), 'Tenure Area' (TA), 'Effective' (01/12/1998), 'End Date' (06/30/2001), 'Board Date' (01/06/1998), 'Reason' (Blank), 'Prob.Ends' (06/30/2001), and 'Seniority' (01/12/1998). The 'Associated Positions' table shows:

Effective	End Date	Title
07/01/2008	/ /	TEACHER ASSISTANT KINDERGAR
07/07/2008	08/08/2008	SUMMER READ/MATH/REC PROG Teach
07/01/2008	/ /	SUBSTITUTE TEACHER

The 'Notes' field contains the text 'teachers aide seasonal # 31z4'. A callout bubble points to the 'Appointment Type' field, which is currently set to 'PROB'.

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Enter the End Date for the PROB appointment and then select 'Add Appointment Similar to Seq. "01"' from the Options Button.

The screenshot displays a software interface for managing appointments. At the top, there are tabs for Budget, Pay Sched, Deductions, H/R, Assignments, Attendance, and Benefits. Below these are tabs for Longvty, Board Action, Certificates, Leave, Evaluations, Course/Degree, and Addt. The main area shows a table with columns: Tenure Area, Type, Effective, End Date, Board Date, Rank, Senior Date, and Pos. Cla. The first row is highlighted in yellow and contains: ASSISTANT, PROB, 01/12/1998, 06/30/2001, 01/06/1998, and 01/12/1998. Below the table, there are fields for Position Class (CR), Appointment Type (PROB), and Tenure Area (TA). A dropdown menu is open, showing options: Add Appointment, Add Appointment Similar to Seq."01" (highlighted), End Probation/Add Permanent Appointment, Delete Appointment Seq."01", Add Appointment Seq."01" to Board Action, Sort Appointments by Primary/Seq, Sort Appointments by Tenure/Appt Area, Sort Appointments by Active/Historical, Sort Appointments by Tenure Area/Effective/Appt. Type, and Sort Appointments by Tenure Area/Appt. Type/Effective. Below the dropdown, there are fields for Original, Current, and End Date, along with a Substitute for field. The Effective date is 01/12/1998, Current is 01/12/1998, and End Date is 06/30/2001. Below these are fields for Board Date, Seniority, Longevity, Rank, and Board Category. At the bottom, there is a table for Associated Positions with columns: Effective, End Date, and Title. The first row is highlighted in green and contains: 07/01/2008, / /, and TEACHER ASSISTANT KINDERGAR.

Tenure Area	Type	Effective	End Date	Board Date	Rank	Senior Date	Pos. Cla
ASSISTANT	PROB	01/12/1998	06/30/2001	01/06/1998		01/12/1998	CR
		/ /	/ /	/ /		/ /	

Original	Current	End Date	Substitute for
Effective 01/12/1998	01/12/1998	06/30/2001	Reason
Board Date 01/06/1998	01/06/1998	00/00/0000	Prob. Ends 06/3
Seniority 01/12/1998	Rank	Board Category	
Longevity 01/12/1998			

Effective	End Date	Title
07/01/2008	/ /	TEACHER ASSISTANT KINDERGAR
07/07/2008	08/08/2008	SUMMER READ/MATH/REC PROG Teach
07/01/2008	/ /	SUBSTITUTE TEACHER

Selecting to Add Appointment Similar to the one currently displayed will add an appointment with the same Position Class, Appointment Type and Tenure Area. The system will also maintain the same 'Original' Dates because the appointments are assumed to be concurrent because of the 'Similar' status. For this same reason, the Current Effective date is automatically populated with the date that represents the day after the previous appointment end date.

Using this option also automatically links the new appointment to the same position as the previous appointment.

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Next, change the Appointment Type to TENR and also add the Current Board Date. If there was an Original Board Date in the previous appointment, that value will be populated on this appointment as well.

Select the Save icon to save the changes.

Date	Rank	Senior.Date	Pos.Cla						
02	TA	TEACHING ASSISTANT	TENR	07/01/2001	/ /	07/01/2001		01/12/1998	SR
01	TA	TEACHING ASSISTANT	PROB	01/12/1998	06/30/2001	01/06/1998			
03				/ /	/ /	/ /			

Position Class CR  Certified (Unclassified)

Appointment Type TENR  Tenured  Primary

Tenure Area TA  TEACHING ASSISTANT

Effective Original 01/12/1998 Current 07/01/2001 End Date 00/00/0000 Substitute for Reason Blank

Board Date 07/01/2001 Current 07/01/2001 End Date 00/00/0000 Prob.Ends 06/30/2001

Seniority 01/12/1998 Rank Board Category Blank

Longevity 01/12/1998

Notes teachers aide seasonal # 31z4

Effective	End Date	Title
07/01/2008	/ /	TEACHER ASSISTANT KINDERGAR
07/07/2008	08/08/2008	SUMMER READ/MATH/REC PROG Teac
07/01/2008	/ /	SUBSTITUTE TEACHER

The new Appointment would be Primary. Using this method requires that you manually deselect the Probationary appointment so that it is not selected as primary.

## CREATING A TENURED APPOINTMENT FOR ENDED PROBATION

The Tenured appointment may be added **MANUALLY** by selecting the next available blank line on the upper grid and then manually entering all of the data into the fields.

Position Class, Appointment Type, Unclassified Area (or Tenure Area), all the dates in the Original column, the Current dates and the Prob. Ends date. Also, the Primary check box will need to be selected manually.

The screenshot shows a software interface with a menu bar at the top containing: Information, Positions, Add Items, Budget, Pay Sched, Deductions, H/R, Assignments, Attendance, Benefits. Below this is a sub-menu bar with: Overview, Appointments, Snrty/L, Certificates, Leave, Evaluations, Course/Degree, Addt.

A table displays appointment data with columns: Seq, Code, Tenure/Appointment, Date, Board Date, Rank, Senior Date, Pos. Cla. The first row (Seq 01) is highlighted in yellow and contains: 01, TA, TEACHING ASSISTANT, 2001, 01/06/1998, Rank, 01/12/1998, CR. The second row (Seq 02) is selected with a blue arrow pointing to it. A callout bubble points to this row with the text: "Select the next available line and start manually adding the data."

Below the table are several input fields: Position Class (Blank), Appointment Type (Blank), Unclassified Area (Blank), Effective (00/00/0000), Board Date (00/00/0000), Seniority (00/00/0000), Longevity (00/00/0000). There are also buttons for "Substitute for" and "Reason".

An "Options" button is visible, which has opened a context menu with the following items: "Add Appointment", "Add Appointment Similar to Seq. '02'", "End Probation/Add Permanent Appointment", and "Delete Appointment Seq. '02'". A callout bubble points to this menu with the text: "Choose to 'Add Appointment' from the Options button."

A large grey box with the text "OR" is placed between the two callout bubbles, indicating two alternative methods for adding an appointment.

### Preferred Method

A routine has been created that makes this process much simpler and more automatic. It requires minimal table maintenance. Once this is setup, the routine will populate all fields and automatically know that the new appointment is for a Tenured appointment and change that as well.

## TABLES SETUP:

Manage/Employee Maintenance HR\Tables\Appointment Category Maintenance

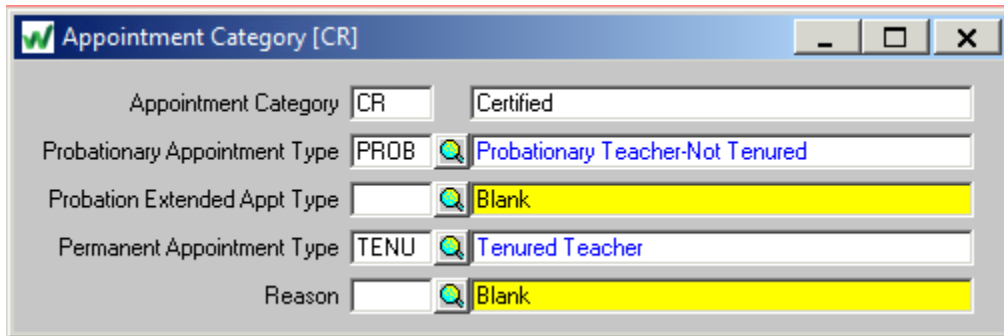
Find the appropriate Appointment Category

Click Modify

Probationary Appointment type – Select your probationary code

Permanent Appointment Type – Select your Tenured code

Click save



The screenshot shows a window titled "Appointment Category [CR]" with the following fields and values:

Field	Code	Description
Appointment Category	CR	Certified
Probationary Appointment Type	PROB	Probationary Teacher-Not Tenured
Probation Extended Appt Type		Blank
Permanent Appointment Type	TENU	Tenured Teacher
Reason		Blank

Once the tables have been setup, modify the employee information by performing the following instructions:

Click Modify and then click on BOB (Blue Options Button)

Employee [Modify 00793 BUGS BUNNY]

2019 00793 SS# [REDACTED] BUGS BUNNY Active

Information Positions Add Items Budget Pay Sched Deductions **H/R** Assignments Attendance Benefits

Overview **Appointments** Snrty/Lngvty Board Action Certificates Leave Evaluations Course/Degree Addt

Seq	Code	Tenure/Appointment Area	Type	Effective	End Date	Board Date	Rank	Senior.Date	Pos. Cla
01	SST	Secondary Science Teacher	PROB	08/30/2017	//	//		08/30/2017	CR
02				//	//	//		//	

Position Class CR Certified Primary HR User Date 1 00/00/0000

Appointment Type PROB Probationary Teacher-Not Tenured

Tenure Area SST Secondary Science Teacher

Effective Original 08/30/2017 Current 08/30/2017 End Date 00/00/0000

Board Date 00/00/0000 Prob.Ends 00/00

Longevity 08/30/2017 Extended Prob. Ends 00/00

Seniority 08/30/2017 Rank Board Category

Effective	End Date	Title
08/30/2018	//	TEACHER 7-12
12/01/2018	//	BUS AIDE - Charlottesville Run
07/01/2018	//	Game Supervisor

Options menu:

- Add Appointment
- Add Appointment Similar to Seq."01"
- End Probation/Add Permanent Appointment**
- Delete Appointment Seq."01"
- Add Appointment Seq."01" to Board Action
- Sort Appointments by Primary/Seq
- Sort Appointments by Tenure/Appt Area
- Sort Appointments by Active/Historical
- Sort Appointments by Tenure Area/Effective/Appt.Type
- Sort Appointments by Tenure Area/Appt.Type/Effective

This single option performs the following:

1. Adds a new appointment with a Tenured Appointment Type
2. Populates all of the Original Date Fields from the previous position
3. Populates the proper Current date, beginning with the first day after the last day of the Probationary appointment
4. Links the appointment to the position

Selects the appointment to be Primary, while deselecting the old appointment so that it is not primary