Description: This job aid provides instructions on how to create a courtesy appointment in Workday

Applies to: Academic administrators and Dean's Office Staff

Notes: Courtesy appointments for current A&S faculty should be requested through the Dean's Office.

Instructions: Fields not specified in this document are to be skipped or left blank.

Courtesy appointments can include creating academic affiliates or adding affiliate status to former faculty and staff. Academic affiliates are people who have an academic appointment at Brandeis, but do not have an employment relationship with the university. In Workday, academic affiliates only exist in the context of academic appointments; they hold appointments, but do not receive a salary from the university's payroll department. *Courtesy appointments for current Arts & Sciences faculty should be requested through the Dean's office*.

Before creating *any* academic affiliates in Workday, please search for an existing Workday record.

For terminated workers or contingent workers whose contracts have ended, you need to use the *Add Academic Affiliate Status to Worker* task. The steps below are only for active workers and contingent workers or new appointees to the university.

If you need to create a courtesy appointment for an inactive student, please contact the Help Desk. **Do not create an affiliate record for the inactive student until you have done so**.

CREATE A COURTESY APPOINTMENT

1. Type **Add Academic Appointment** into the Workday search bar.
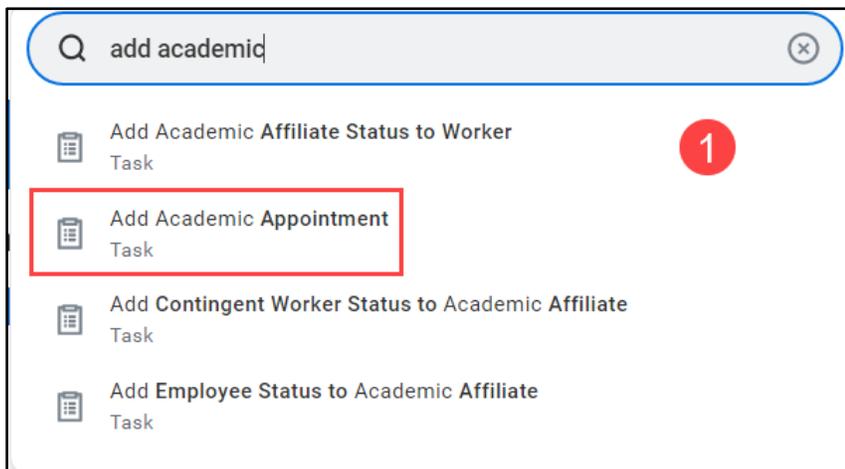
2. Select **Academic Appointee** or select **Create Academic Affiliate**. If the appointee is being paid for *any* position, select Academic Appointee and search for the appointee's name. Then click the **OK** button and skip to step 8 to proceed with entering the appointment information.

Add Academic Appointment

Take Note: **Academic Affiliate records should not be created for Inactive Students. Please send an email to workday-help@brandeis.edu if you are attempting to create an Academic Affiliate record for an Inactive Student.**

○ Academic Appointee

○ Create Academic Affiliate

2

OK   Cancel

3. Select the **Academic Unit** associated with the appointment.

4. Enter the affiliate's legal name in the first tab.

Add Academic Appointment

Academic Unit *   × English Department ···   **3**

Legal Name   Contact Information   Personal Information   ID   Photo

Country *   × United States of America

Prefix

First Name *   Jane

Middle Name   **4**

Last Name *   Austen

Suffix

5. Under contact information tab, please enter the affiliate's phone number, email address, and home address by clicking the add buttons.

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Legal Name   **Contact Information**   Personal Information   ID   Photo

5

Phone

(Add)

Address

(Add)

Email

(Add)

6. For reporting purposes, please fill out as much information as possible in the **Personal Information** tab (such as gender, DOB, race/ethnicity, etc).

Legal Name   Contact Information   **Personal Information**   ID   Photo

Legal Sex	✕ Female
Date of Birth	01/01/1981
Marital Status	✕ Single (United States of America)
Hispanic or Latino	☐
Race/Ethnicity	✕ Asian (United States of America)
Religion	
Citizenship Status	✕ Citizen (United States of America)
Last Medical Exam	MM/DD/YYYY
Last Exam Valid To	MM/DD/YYYY
Medical Exam Notes	

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7. Click **OK**.

8. Enter the **Start Date** of the appointment.

9. Enter the **Academic Unit**, if it has not already pre-filled.

10. Select **Courtesy, non tenure line for faculty** or **Courtesy (non-faculty)** for non-faculty appointments.

11. Select **Add Academic Appointment > Initial > Courtesy** as the reason for the appointment.

12. Select the correct **Rank** – it will auto fill the **Title** field, you may adjust the title as necessary.

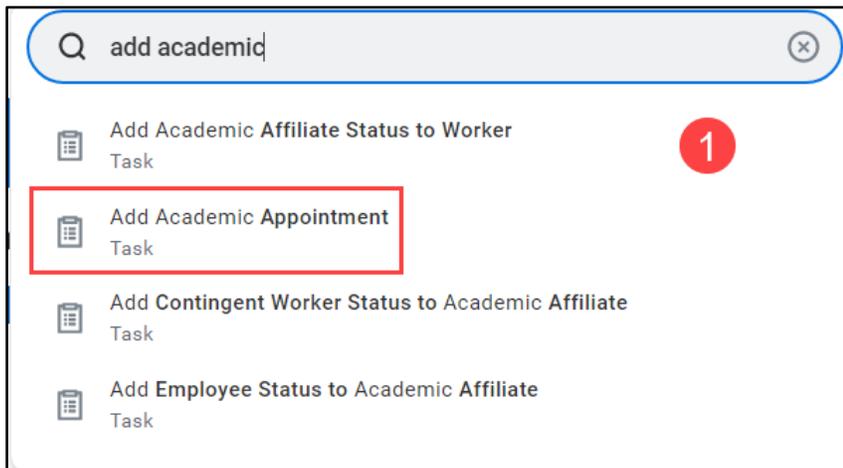13. Enter the **End Date** of the appointment.

14. Enter the **Identifier**.

15. Enter the **Roster Percent**, if necessary.

16. If there is a related academic unit, please select.

17. For *Courtesy (non-faculty)* tracks, the Office of Research Administration (ORA) **requires** that you attach the appointee's CV/Resume.

18. Click the **Submit** button. If you have selected *Courtesy, faculty, non-tenure* as the appointment type, the approval process will begin.

19. If you have selected *Courtesy (non-faculty)* you will be asked to review the information you have entered.

20. Click the **Review** button. You will see options to approve, send back or add approvers. If you click **Approve**, the courtesy appointment will route to the approval process immediately. If you click **Add Approvers**, you will be able to add sponsor(s) to the process to approve the appointments for Visiting Research Scholars, Visiting Research Scientists, and Visting Student Researchers. ORA requires that a Brandeis sponsor give their approval before they will approve an appointment and issue an appointment letter. You can add approvers by typing a name into the additional approvers field. *By clicking add approvers, you are approving the review of the appointment. The task will not return to you unless the next approver(s) return the item to you for editing.*

ADD AFFILIATE STATUS TO FORMER FACULTY & STAFF

1. Type **Add Academic Appointment** into the Workday search bar.

2. Select **Academic Appointee** or select **Create Academic Affiliate**. If the appointee is being paid for *any* position, select Academic Appointee and search for the appointee's name. Then click the **OK** button and skip to step 8 to proceed with entering the appointment information.

Add Academic Appointment

Take Note: **Academic Affiliate records should not be created for Inactive Students. Please send an email to workday-help@brandeis.edu if you are attempting to create an Academic Affiliate record for an Inactive Student.**

○ Academic Appointee [☰] **2**

○ Create Academic Affiliate

[OK] (Cancel)

3. Select the **Academic Unit** associated with the appointment.

4. Enter the affiliate's legal name in the first tab.

Add Academic Appointment ⚙

Academic Unit * [✕ English Department ··· ☰] **3**

| Legal Name | Contact Information | Personal Information | ID | Photo |

Country * [✕ United States of America ☰]

Prefix [☰]

First Name * [Jane]

Middle Name [   ] **4**

Last Name * [Austen]

Suffix [☰]

5. Under contact information tab, please enter the affiliate's phone number, email address, and home address by clicking the add buttons.

Legal Name   **Contact Information**   Personal Information   ID   Photo

5

Phone

Add

Address

Add

Email

Add

6. For reporting purposes, please fill out as much information as possible in the **Personal Information** tab (such as gender, DOB, race/ethnicity, etc).

Legal Name   Contact Information   **Personal Information**   ID   Photo

Legal Sex	✕ Female
Date of Birth	01/01/1981
Marital Status	✕ Single (United States of America)
Hispanic or Latino	☐
Race/Ethnicity	✕ Asian (United States of America)
Religion	
Citizenship Status	✕ Citizen (United States of America)
Last Medical Exam	MM/DD/YYYY
Last Exam Valid To	MM/DD/YYYY
Medical Exam Notes	

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7. Click **OK**.

8. Enter the **Start Date** of the appointment.

9. Enter the **Academic Unit**, if it has not already pre-filled.

10. Select **Courtesy, non tenure line for faculty** or **Courtesy (non-faculty)** for non-faculty appointments.

11. Select **Add Academic Appointment > Initial > Courtesy** as the reason for the appointment.

12. Select the correct **Rank** – it will auto fill the **Title** field, you may adjust the title as necessary.

13. Enter the **End Date** of the appointment.

14. Enter the **Identifier**.

Add Academic Appointment   Jane Austen (Affiliate) - No Appointment

Take Note: **Academic Affiliate records should not be created for Inactive Students. Please send an email to workday-**

Start Date	* 08/01/2022	8
Academic Unit *	× English Department ⋯	9

Appointment Information

Track Type	* × Courtesy (Non-faculty) ⋯	10
Track Type Category	Non-faculty Scholars	
Reason	* × Add Academic Appointment > Initial > Courtesy	11
Rank	× Visiting Research Scholar ⋯	12
Named Professorship		
Appointment Specialty		
Constructed Title	(empty)	
Title	* Visiting Research Scholar	12
End Date	07/31/2023	13
Identifier	* × P-Primary Appointment - Primary	14

15. Enter the **Roster Percent**, if necessary.

16. If there is a related academic unit, please select.

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17. For *Courtesy (non-faculty)* tracks, the Office of Research Administration (ORA) **requires** that you attach the appointee's CV/Resume.

18. Click the **Submit** button. If you have selected *Courtesy, faculty, non-tenure* as the appointment type, the approval process will begin.

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