Instructions
Maintaining Appointments

This document will show users how to effect maintain positions for Academic, Admin Support, or Trades & Services staff members.

The Maintain function is used to maintain appointment information in NBAJOBS and NYAJOBS for the following groups and functions:

**Academics**
1. Regime
2. Salary award
3. URF/MURF
4. Reduced load
5. Phased retirement
6. Named chair
7. Joint orgns
8. FTE*
9. Salary*
10. FOAPAL*

**Admin Supports**
1. Board and Lodging
2. Probation
3. Regime
4. Hours per day*
5. Salary*
6. FOAPAL*

**Trades and Services**
1. Board and Lodging
2. Seasonal start and end date
3. Premia
4. Probation
5. Regime
6. Hours per day*
7. Salary*
8. FOAPAL*

* You can do FTE, Salary or FOAPAL changes ONLY via the Maintain function only if they are part of a set of maintenance actions done on an Appointment. Salary Changes and FOAPAL Changes have their own Minerva functions. If you want to maintain the salary only, then use the “Salary” function. And if you want to maintain the FOAPAL information only, then use the “FOAPAL” function.
1.0 Getting started – Maintaining appointments

Before you do any sort of Appointment maintenance, make sure you confirm the job information in Banner (NBAJOBS and NYAJOBS) before you make any changes on Minerva.

On Minerva, select the orgn, and the Maintain function, as well as the group and e-class of the person whose appointment you want to maintain. Once completed, click on the Person Search button.

1.1 Finding the person

Once you have selected the job information, you are ready to search for the person you want to promote. Click on the Person Search button to get the Search Form. Searches are restricted to the job criteria entered in the previous page. Notice how the job selection search criteria are displayed above the search form to help you keep track.

Since the person already exists on Banner, the best way to search is to use the McGill ID.

When you have found the person, click on the (in bold, underlined) McGill ID number to select this person. This will transfer you to the “Appointment Form - Position Selection” screen where you will see which appointment(s) this person currently holds in the selected org number and e-class. Different appointment forms will be displayed depending on which group the job belongs to.
Click on the Posn number (underlined, in bold) of the job you wish to maintain. This will take you to the “Appointment Form – Job Information” screen where you can now maintain the appointment.
2.0 Maintaining Academic Appointments

You can perform the following maintenance operations in Minerva for Academic appointments:

1. Salary award: add or remove
2. URF/MURF: add or remove
3. Reduced load: add or remove
4. Phased retirement: add or remove
5. Named chair: add or remove
6. Joint orgns: add or remove
7. Regime: when you change the regime, you must also maintain the FTE (full-time equivalency) under the “Salary Changes” screen (click on the Salary Changes button). The hours per day are automatically re-calculated when the FTE is changed (press the TAB key once data is entered to update, then on Save and Continue).

If you must do a FOAPAL Change or a Salary Change exclusively, please cancel your document and restart with the proper function selected. However, if the FOAPAL or salary change is part of a group of maintenance changes, you can perform it within the Maintain function.

Screenshot 3: Academic maintenance functions (shown here for a joint orgn appointment)
3.0 Maintaining Admin Support Appointments

You can perform the following maintenance operations in Minerva for Admin Support:

1. **Board and Lodging**: add or end
2. **Probation Information**: add or remove
3. **Regime**: when you change the regime, you must also update the Hours Per Day field under the “Salary Changes” screen (click on the Salary Changes button). The FTE is automatically re-calculated when the hours are changed (press the TAB key once data is entered to update, then on Save and Continue).

If you must do a **FOAPAL Change** or a **Salary Change exclusively**, please cancel your document and restart with the proper function selected. However, if the FOAPAL or salary change is part of a group of maintenance changes, you can perform it within the Maintain function.

![Screenshot 4: The Admin Support maintenance functions are Regime and Board & Lodging Information.](image)
Screenshot 4: If you do a *Regime* change in the *Maintain* form, click on the “Salary Changes” button to fix the Hours per Day, then on “Save and Continue”.
4.0 Maintaining Trades & Services Appointments

You can perform the following maintenance operations in Minerva for Trades & Services:

1. **Seasonal** start and end date: add, change or remove
2. **Premia**: add or end
3. **Board and Lodging**: add or end.
4. **Probation**: add or remove
5. **Regime**: when you change the regime, you must also update the Hours Per Day field under the “Salary Changes” screen (click on the Salary Changes button). The FTE is automatically re-calculated when the hours are changed (press the TAB key once data is entered to update, then on Save and Continue).

If you must do a FOAPAL Change or a Salary Change exclusively, please cancel your document and restart with the proper function selected. However, if the FOAPAL or salary change is part of a group of maintenance changes, you can perform it within the Maintain function.

Screenshot 5: For Trades & Services maintenance, you can add up to 10 premia to the Appointment. If you do a Regime change in the Maintain form, remember to go to “Salary Changes” to fix the Hours per Day, then on “Save and Continue”.
5.0 Final step: 3 possible actions

“Save” – you will remain on the same screen, but any Notes that you’ve typed in will have been saved too. You can then view the completed document by clicking on the Doc No and also print it for your records – but don’t send a copy to Human Resources. This is for your files only.

“Save and Continue” – This will save the completed document and send you back to the Appointment List. It will remain on your list and you will need to act on it later (either to submit it or cancel it).

“Submit” – If you are satisfied with your document, you can submit the salary change to your faculty or to HR Salary Administration or to VP Academic by clicking on the Submit button. Once submitted, the document disappears from your list. The document will transferred for approval and go to SUS or PEN status. You will be sent back to your Appointment List. If you need to see the document again, use the Status Report search to track it down.