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.**

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

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

5. Under contact information tab, please enter the affiliate’s phone number, email address, and home address by clicking the add buttons.
6. For reporting purposes, please fill out as much information as possible in the **Personal Information** tab (such as gender, DOB, race/ethnicity, etc).
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.
3. Select the **Academic Unit** associated with the appointment.

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

5. Under contact information tab, please enter the affiliate’s phone number, email address, and home address by clicking the add buttons.
6. For reporting purposes, please fill out as much information as possible in the **Personal Information** tab (such as gender, DOB, race/ethnicity, etc).
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 Visiting 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.