

# Courtesy Faculty Appointment(s): Frequently Asked Questions

## General Appointment Process

- **Where can I locate the courtesy faculty policy and when does it go into effect?**
  - The policy goes into effect on February 1, 2023 and can be located on the [UF Policy Hub](https://hub.policy.ufl.edu/s/article/Courtesy-Faculty); <https://hub.policy.ufl.edu/s/article/Courtesy-Faculty>
- **Where can I find courtesy faculty information and resources?**
  - Courtesy faculty appointment information can be found on our [Employment Hub](https://hr.ufl.edu/manager-resources/employment-hub/non-employee-appointments/) under Non-Employee appointments; <https://hr.ufl.edu/manager-resources/employment-hub/non-employee-appointments/>
- **How do you define a courtesy appointment?**
  - Courtesy faculty are non-remunerative appointments for those individuals who will provide substantive and sustained contributions in achieving the mission of the department and the University. Some examples of contributions are graduate committee service, collaborative research, or a visiting scholar.
- **What is the difference between the available modifiers in ePAF?**
  - There are 3 types of courtesy faculty modifiers:
    - **Courtesy (CO)** - This modifier should be used for those individuals not currently employed by the University of Florida in any other capacity.
    - **Joint\* (JNT)** – This modifier should be used to designate an employed faculty member who is performing responsibilities in teaching or graduate supervision in another department on a regular basis
    - **Affiliate\* (AFFL)** – This modifier should be used to designate an employed faculty member’s participation in some function of another department on an infrequent or occasional basis

\* The affiliate and joint designations identify those individuals who have another appointment(s) on campus, whereas the standard “CO” courtesy modifiers are exclusive to non-UF employees

- **Where can I locate a list of all job codes?**
  - Available job codes and descriptions can be found at <https://hr.ufl.edu/wp-content/uploads/2022/07/courtesy-job-codes-and-descriptions.pdf>
- **Since courtesy faculty appointments require a social security number (SSN) to be entered in myUFL, how do I hire someone who may not have an SSN?**
  - If a courtesy faculty member does not have an SSN, [Payroll Services](#) can issue the UF Temporary ID. You will need to email [payroll-services@ufl.edu](mailto:payroll-services@ufl.edu) the UFID, reason why the ID is needed, name of requestor, department name and phone number.
- **The policy states that a dean or vice president (per college or unit policy and procedure) must approve the appointment letter; may I have a chair or director sign the letter in lieu?**
  - Yes, if your college/academic unit’s leadership wants to designate someone else then we would need an approved delegate of authority (letter/email) from the dean/vice president, etc.
- **Can we hire a courtesy faculty who solely resides in another country if they are collaborating with a UF faculty member?**

- Yes, if the person is not in the U.S. and will be serving as a courtesy faculty abroad, then a U.S. employment-based visa is not required.
- **If the end date of the original offer letter needs to be extended between years 1 - 5, do you require an updated offer letter?**
  - Since no hire ePAF is necessary between that time frame the department can store an updated letter at their level. If previous versions of your college's letters stated "renewed annually" then no additional letter is required until the 5-year mark; after which the appointment will be automatically terminated through the Courtesy Faculty Review File but can be reappointed with a new offer letter and by entering a new hire ePAF (see review file instructions below).
- **We have an incoming faculty member that needs to get a jump start on transferring grants through UFIRST, are we able to use the courtesy faculty salary plan to get them in the system sooner?**
  - If an incoming faculty member has already accepted their offer of employment and a signed offer letter is attached to the hire ePAF then yes, it may serve as a temporary workaround, but it is important that the courtesy appointment is terminated once their primary faculty appointment is active in Job Data. Departments should attach the signed primary appointment offer letter and notate in the ePAF comments the purpose of this appointment.
- **Under Limitation 4.98 it states, "Courtesy appointments are not to be issued to extend access for the continuation of work associated with employment for retiring or terminating faculty." Are we able to still provide a courtesy appointment for those who are resigning but wish to remain on a committee to finish off their current commitments?**
  - Yes, if the faculty member is only resigning, not retiring, and is going to continue serving on let's say a graduate committee then that is acceptable. Continuing their commitment in this scenario is not deemed as "continuation of work".

## Requirements

- **What are the requirements and specific documents needed to hire a courtesy faculty?**
  - **Requirements**
    - Curriculum Vitae
    - Offer letter with a start and end date
      - Approval from dean or vice president, per college of unit policy and procedure
      - Outlines responsibilities and assignment, duties
      - Include explanation of how the appointment will benefit the applicant, the department, and the college
    - Social Security number for entry into myUFL – a copy of the card is not needed
  - **If Applicable**
    - Approved Employment of Relatives email, see policy procedures for Nepotism
    - Work authorizations and approvals, see policy procedures for Limitations
    - Verification of rehire-ability
      - Only if receiving benefits under the [Florida Retirement System \(FRS\)](#) during the first 12 calendar months after effective retirement date, see policy procedures for Limitations

**\*To ensure that you are following all procedures please review the courtesy faculty policy located on the [UF Policy Hub](#) as there are more detailed requirements pertaining to screening and limitations.**

## Courtesy Faculty Review File

- **When does the file open and how regularly will a review be needed?**
  - The first file will open on 3/1/23 and closes 3/31/23 with an effective date of 3/31/23.
  - To ensure an accurate headcount of your courtesy population, your department's best practice should involve consistently terminating any appointment that is no longer needed to mitigate any risks associated with system access and to reduce costs linked to licensing, subscriptions, etc.
- **What are my action items with the review file?**
  - All courtesy appointments will have the box checked for termination
    - The appointments that the college/unit does not want to termination will need to be **unchecked**
  - All courtesy appointments older than 5 years **must be** renewed with an updated offer letter
    - Reappointments shall be entered via Hire ePAF effective 3/31/23 since initial appointment will be set to term in file. Appointments in subsequent years will follow the same process but will have a different effective date based on the current year which will be communicated each year prior to the file opening.
- **How can I navigate to the file in myUFL?**
  - The courtesy faculty review file is located at: Main Menu > Human Resources > Workforce Administration > Job Information > UF Appointment Review

## Researcher and Research Support Screening (RISC Assessments)

- **How are researcher and research support positions defined?**
  - They are defined as "Any UF person who directs or conducts research or creates research materials or receives training in the conduct of research or a person who collects, manipulates, manages, or controls access to research data or research activities or other sensitive data."
  - "Positions may involve external oversight for conducting activities, however the source of funds does not dictate the coding of researcher or research support positions. These positions can include scholarly activities." For further instructions on how to complete the process: <https://hr.ufl.edu/manager-resources/recruitment-staffing/researcher-screening/>
- **What is the process for those who fall in this category?**
  - There is an attestation box at the bottom of the courtesy faculty offer letter template that must be completed by the department.
  - If marked "Yes" then the department should provide the courtesy faculty member this screening link: <http://explore.jobs.ufl.edu/cw/en-us/job/527535?ApplicationSubSourceID=>
- **If someone has already gone through the RISC assessment screening, do they have to do it again for a new courtesy appointment?**
  - Yes, if the appointment meets the definition of a researcher or research support position.
- **Are joint and affiliate faculty included in the researcher and research support screening process?**
  - Joint and affiliate faculty (employed faculty members) are not included in the researcher and research support screening process.
- **Are courtesy appointments that require reappointments (after five years in appointment) included in the researcher and research support screening process?**
  - No, courtesy appointments with reappointments are not included (even if the applicant was not previously included) in the researcher and research support screening process.