

### What steps should I take to convert former affiliate to courtesy appointments?

1. Confirm with your unit leader or their designee that the person should receive a courtesy appointment.
2. Complete a [courtesy appointment letter](#) and [appointment form](#).
3. Ask the appointee to complete a [Courtesy Personal Demographic Information Form](#).
4. Send the completed letter, appointment form and demographic form to HR Support Services at [hrrsupportservices@oregonstate.edu](mailto:hrrsupportservices@oregonstate.edu). You will receive an email confirmation that the request has been received. If your request is urgent, meaning that it must be completed within the next three business days, please include that detail. HR Support Services completes all requests as soon as possible.
  - a. If you are also requesting that the individual be added to OSU's Graduate Faculty, please include the [Graduate Faculty Nomination Form](#) (alternatively, the [Graduate Faculty Nomination Form Accessible Version](#)) and copy the Graduate School at [graduate.faculty@oregonstate.edu](mailto:graduate.faculty@oregonstate.edu). Be sure to include all attachments required by the Graduate School. The courtesy appointment must be current in Banner before being processed by the Graduate School.
5. HR Support Services will enter the courtesy appointments as quickly as possible and confirm with you.

#### Tips to make this process easier:

- Please don't assume that all former affiliates need to be converted. Taking time to confirm will save you time in the long run.
- For the remainder of AY23, HR will assume that any requests received to convert an affiliate to courtesy status has the dean/unit head's approval. This is reasonable because existing affiliates *also* had to be approved by the dean/unit head.
- Many departments already have copies of the former courtesy/affiliate forms on file for their existing affiliate appointments. Those can be provided in lieu of new courtesy appointment forms provided that new begin and end dates for the courtesy appointment are included.
- Using a spreadsheet will enable you to merge appointment letters and can be used in lieu of individual appointment request forms. Please be sure that each person's [Courtesy Personal Demographic Information Form](#) is included and that your home organization code is provided. (Note: use of a spreadsheet is what was meant when Graduate Program contacts received information that "HR will need just basic information: Name (first, last, middle), department's name and the start and end date of the appointment, plus the memo to appoint. The memo has been updated and can be mail merged.")