Contents

Role of HR Admin

WSU HR Fundamentals

EPAF 1, 2, 3

Data entry post EPAF

Posting Screen/OHS for Represented

OHS 1, 2, 3

Banner Navigation

AppXtender

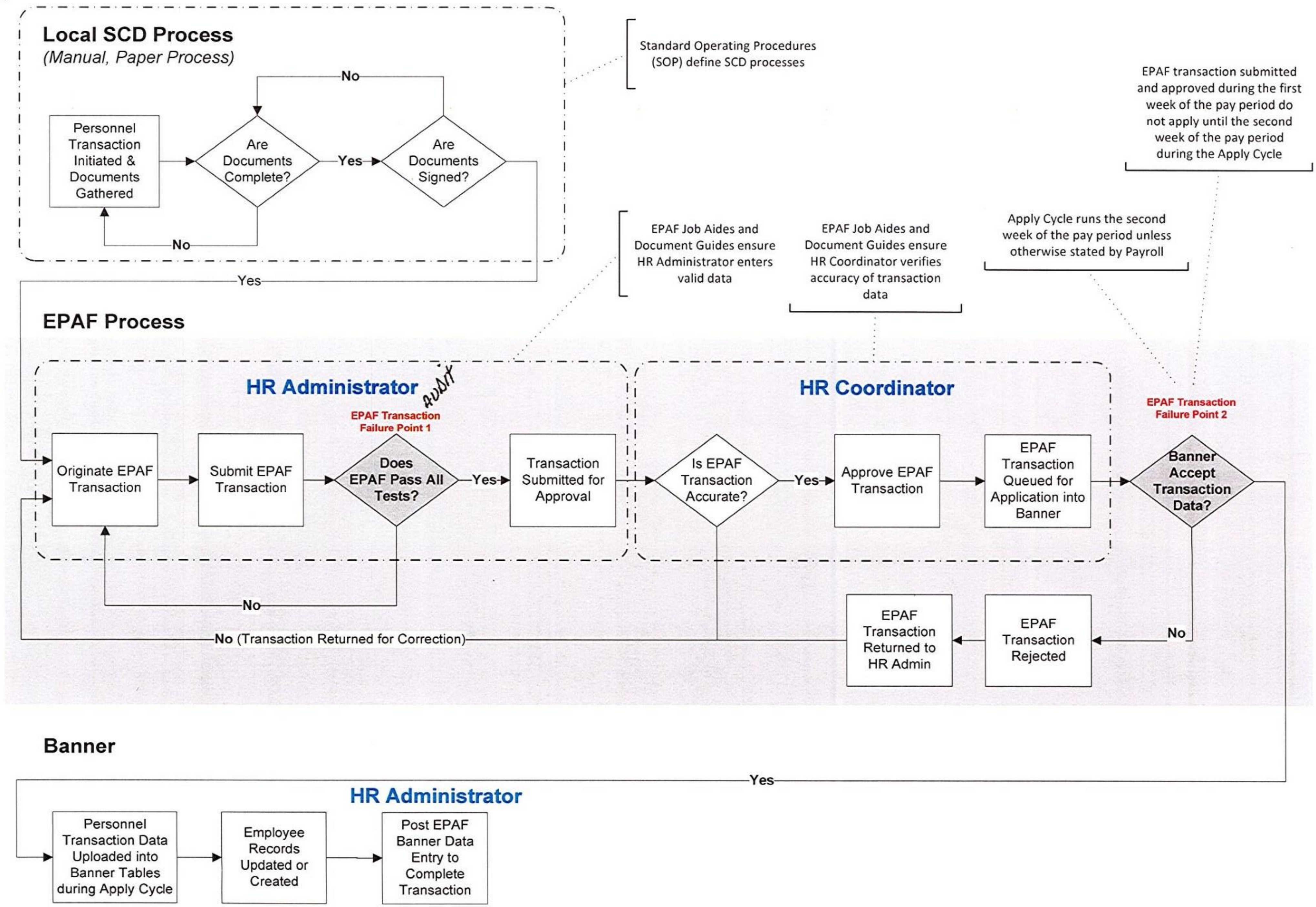
I-9 Express

Cognos

Role of HR Admin

7-9-13

WSU Personnel Tra..saction Process



WAYNE STATE UNIVERSITY
HUMAN RESOURCES

The Role of the HR Coordinator and HR Administrator

Lila Asante-Appiah and Les Nolan,
Organization & Employee Development

lesnolan@wayne.edu.
7-9021

Agenda

- Introduction
- About Client Services
- The Role of the Coordinator and Administrator
- Customer Service Success for the HR Professional
- Wrap Up and Personal Development Plan

7/2/2013 Slide 2 WAYNE STATE

Service agreement

Session Objectives

As a result of this module, Coordinators and Administrators will be able to:

- Define **WSU Client Service's mission** and how their role fits
- Identify the **knowledge, skills, abilities and values needed** to contribute to the success of this position
- Demonstrate effective **customer service and client partnership** behaviors
- Assess **personal development goals and strengths**

7/2/2013 Slide 3

Group Resume

- In small groups, create a group resume including such things as:

- □ Total Years of WSU HR Experience
- □ Education & Certifications
- □ Skills
- □ Positions Held
- □ Outside Interests

- Identify a volunteer to report out.

7/2/2013 Slide 4 WAYNE STATE

About Client Services

Lila Asante-Appiah,
Director, Organization and Employee Development

7/2/2013

Slide 5

Where We're Headed
& How We'll Know We Got There

Organization & Employee Development • Total Compensation & Wellness • Business Solutions

Where We're Headed & How We'll Know We Got There

- Better alignment and integration with field and central HR (Creates ONE HR).
- Improve Wayne State University's ability to recruit and manage employees more effectively.
- Greater concentration of HR services to be focused on consultative and strategic efforts (ER/LR, talent management etc.).
- Reduction of unnecessary redundancies and creates greater consistency of service across WSU.
- Leverage technology, best practices & processes to better serve our WSU clients.
- Effectively and efficiently utilize HR resources across the university.
- Better measure the efficiency and effectiveness of HR programs, services and policies which will help with making improvements (data driven decisions).

7/2/2013 Slide 7 WAYNE STATE

Defining Administrators & Coordinators Success

7/2/2013 Slide 8

Successful Administrators and Coordinators

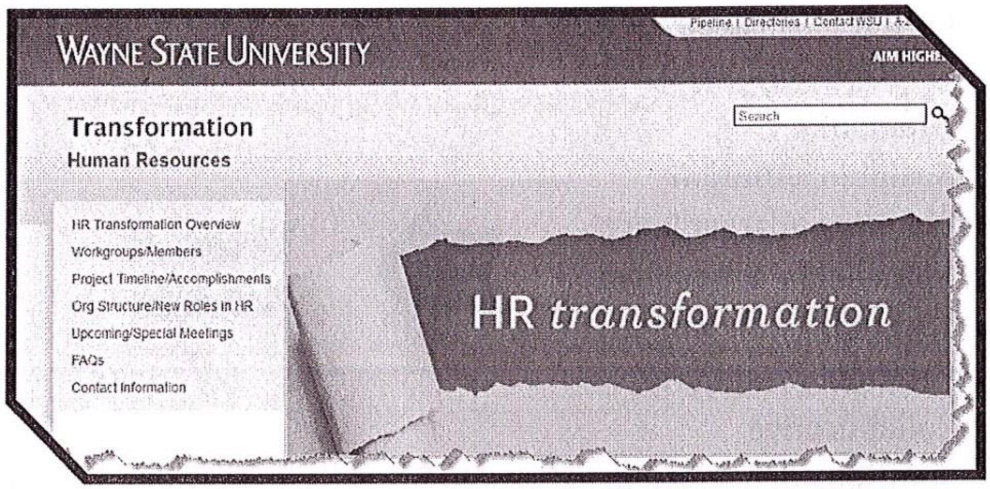
- Communication expertise
- Relationship building
- Flexibility
- Result orientation
- Planning & organizing
- Knowledge of business
- Technology expertise
- Personal Credibility
- Collaborative
- Solutions driven (Gets to "yes")
- Partner (with clients and internal team members)

Trusted Advisor

7/2/2013 Slide 9

WAYNE STATE

Staying in Touch



7/2/2013 Slide 10

Customer Service Success
for the HR Professional

7/2/2013

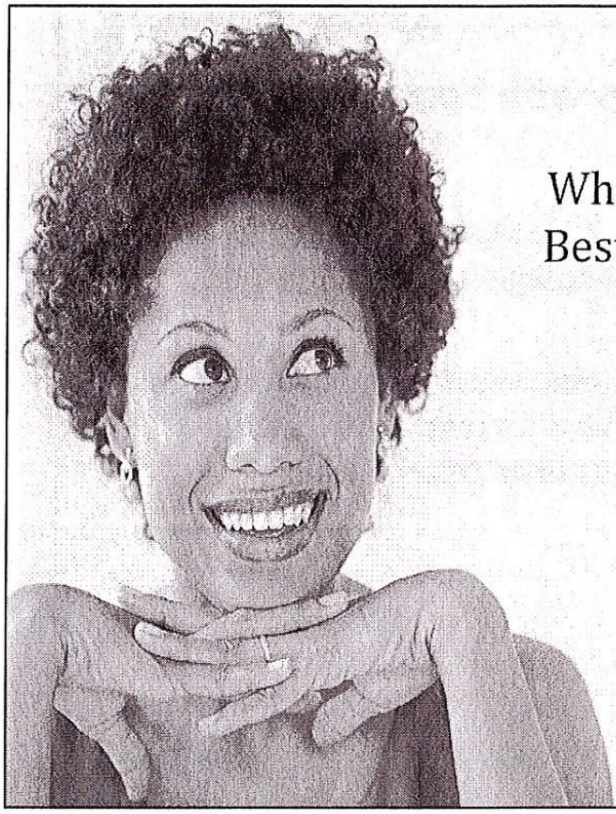
Slide 11

What does it mean to you?

Do your research first.

Put Your Personal Signature on Your Job

WAYNE STATE



What is Your Personal Best Customer Service Experience?

Creating a Partnership with Your Client

- Research from Roffey Park Institute has shown a massive 40% of non-HR Managers think HR is out of 'touch' with their needs.
- This deterioration in the relationship between HR and the client is set to continue with over a third of all clients feeling like HR adds little value to their business.

Creating a Partnership with Your Client

Group A

- What can HR do to **build better relationships** with their clients?

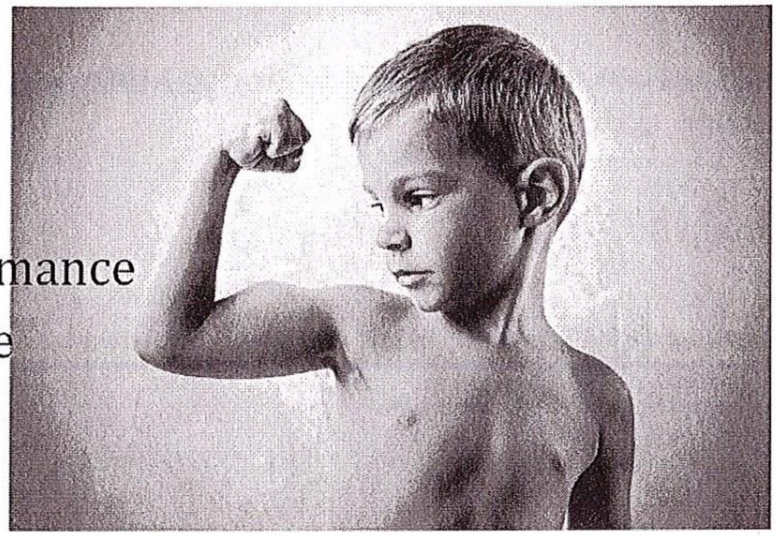
Group B

- What **initiatives can HR drive** to ensure they are working in partnership?

7/2/2013 Slide 15 WAYNE STATE

HR Initiatives that Drive Meaningful Change

- Talent
- Performance
- Change



7/2/2013 Slide 16

What is most important?

SUPPORT

HONESTY

COACHING

PRAISE

CLEAR HR ROLE

TOOLS

COMMUNICATION

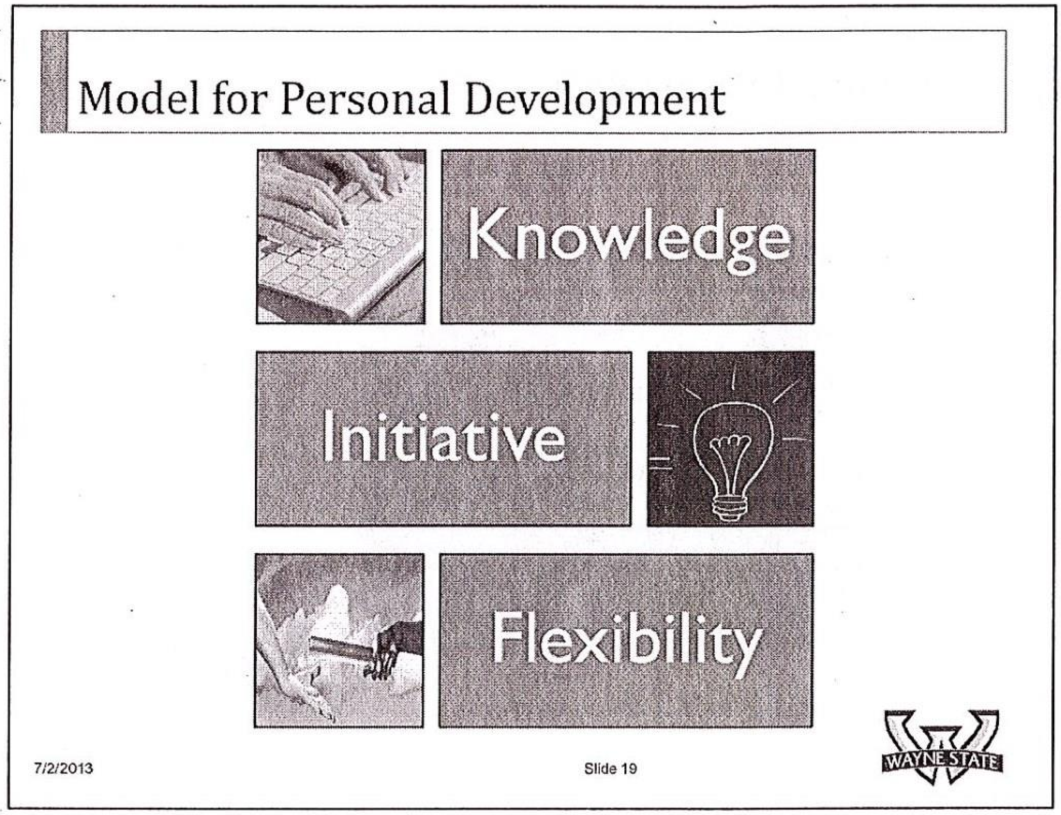
LISTENING

PARTNERS

7/2/2013 Slide 17 WAYNE STATE

Personal Development Plans

Les Nolan
Organization & Employee Development


Model for Personal Development
Knowledge
Initiative
Flexibility
WAYNE STATE
7/2/2013
Slide 19

Personal Development Plans

The Role of the HR Coordinator Personal Development Plan

For each of the key accountabilities listed below, highlight if the item is a strength you currently possess and can capitalize upon or if it is an opportunity for continuous improvement. It may be helpful to reference the job description, the Client Services mission and strategic direction and the *HR Transaction Support* curriculum overview.

If it is a strength, note specifically how you will plan to use it in the next 90 days to achieve your goals. If it is an opportunity, identify a specific development goal by stating what you would like to learn. Keep in mind SMART goal attributes (specific, measurable, attainable, realistic and time-bound). Provide your development goals to OED for a customized personal development plan. Ideally identify at least 3 development goals that could be met by this *HR Transaction Support* curriculum and Accelerate and other resources.

Key Accountabilities *taken from the Job Description*	Strength	*OR*	Opportunity for Improvement
Monitor Work Performed by HR Administrator		*OR*	
Approve all HR Transactions		*OR*	
Resolve Transactional Problems Related to HR & Payroll Processing		*OR*	
Review HRMS Data to Ensure Accuracy		*OR*	
Code & Enter Data into HRMS		*OR*	
Upload & Index Data into Employee Record		*OR*	
Interpret University Policy Related to Transactional Processing		*OR*	

Knowledge Building • Initiative • Flexibility

WAYNE STATE

Wrap Up

Les Nolan
Organization & Employee Development

7/2/2013

Slide 21

What's Next?

Date	Course	Format	Time	Location
7/2	Banner Navigation with WSU Application Overview	Classroom	12:00 - 3:00	UGL Lab A
7/3	Role of the Coordinator/Administrator	Classroom	9:00 - 11:30	3700 AA
7/8	WSU HR Fundamentals	Classroom	12:30 - 2:00	1700 AAB
7/8	EPAF I	Classroom	2:30 - 4:30	1700 AA
7/9	EPAF II	Classroom	12:00 - 2:00	1700 AAB
7/10	EPAF III	Classroom	8:30 - 11:30	1700 AA
7/11	AppXtender	Classroom	8:30 - 10:30	1700 AA
7/11	Cognos	Classroom	11:30 - 1:30	1700 AA
7/17	Data Entry Post EPAF	Classroom	2:00 – 4:00	TB
7/23	Ethics	Classroom	TBD	TB
TBD	WaynePM Training	Classroom	TBD	TB
8/2	Web Time Entry**	eLearning	n/a	Accelerate
8/2	Culture of Respect**	eLearning	n/a	Accelerat
8/2	[illegible] (CUPA-HR [illegible]	[illegible]	n/a	Acce

Summary

Today we:

- Defined **WSU Client Service's mission** and how their role fits
- Identified the **knowledge, skills, abilities and values needed** to contribute to the success of this position
- Demonstrated effective **customer service and client partnership** behaviors
- Assessed **personal development goals and strengths**

7/2/2013 Slide 23 WAYNE STATE

WSU HR Fundamentals

HR Division of Labor Client Services

Client Services Director

Strategic partner to Executive Leadership
Executes HR strategy & consultative services:
General Employment Practices/Employee Relations/Labor Relations/Organizational Development/Compensation & Benefits/Affirmative Action/Equal Employment Opportunity/Policy Development & Interpretation/Workplace Investigations/HR Regulatory Compliance/HRIS Utilization/Workforce Planning/Talent Acquisition/Career Development/Succession Management/Employee Engagement
Partners with Central offices to execute strategic initiatives (OED, TCW, Payroll, OEO, etc.)
Develops, monitors & modifies client service level agreements
Ensures service expectations are achieved
Provides overall leadership & guidance to HR functional area; directs HR staff activities & workflow
Conducts appraisals & provides coaching & counseling to HR staff

Sr. HR Consultant

Handling Special Projects
Mentoring HR Consultants
Employee Relations Incidents/Labor Relations Consulting (in partnership with LR)
Conduct workplace investigations (with central HR & OEO as appropriate)
Job Analysis/Job Descriptions/Position Classifications (in partnership with TCW)
Interviewing & Selection (participate in search committees)
Staff Development & Conduct Training Sessions
Labor Law Guidance (in consultation with Academic Personnel & LR)
Policy Interpretation & Administration
Organizational Development (in partnership with OED)
Talent Management/Succession Planning (in partnership with OED)
Performance Management/Performance Appraisal Review & Consultation
Leave Management (i.e., FMLA) and Administration
Provides counsel on Promotions, Transfers, Demotions
Counsel & Administer Non-Rep Merit Program
Attendance Management
Employee Reorganization/RIF Administration

HR Consultant

Employee Relations Incidents/Labor Relations Consulting (in partnership with LR)
Conduct workplace investigations (with central HR & OEO as appropriate)
Job Analysis/Job Descriptions/Position Classifications (in partnership with TCW)
Interviewing & Selection (participate in search committees)
Staff Development & Conduct Training Sessions
Labor Law Guidance (in consultation with Academic Personnel & LR)
Policy Interpretation & Administration
Organizational Development (in partnership with OED)
Talent Management/Succession Planning (in partnership with OED)
Performance Management/Performance Appraisal Review & Consultation
Leave Management (i.e., FMLA) and Administration
Provides counsel on Promotions, Transfers, Demotions
Counsel & Administer Non-Rep Merit Program
Attendance Management
Employee Reorganization/RIF Administration

HR Division of Labor Client Services

Talent Management Coordinator

Talent Acquisition (job posting – OHS and external sources, resume review, conducts phone screens, candidate testing, interview guide development*, interview & selection* participation in search committees*, provide consultation to Hiring Manager on candidate selection* extend & negotiate job offers* creates position #'s for new pool/new grant funded positions)*

Provide Guidance to Client on Hiring Practices

OHS Administration and Auditing of OHS

Pre-hire Preparation (background check per policy, reference check, I-9 eXpress, E-Verify)

Facilitates background check process for all employees, students and appropriate volunteers

Conducts New Hire Orientation

Prepares Onboarding Schedules

Conducts Exit Interviews; Compiles & Analyzes Exit Data

I9 eXpress, eVerify Daily Review & Change of Status

Tracks Talent Management Metrics (i.e., retention rates, turnover, new hire failure rate, cost per hire, time-to-fill, vacancy rate, performance appraisal metrics, etc.)

Ensures eVerify Requirement are Fulfilled

Coordinates College Work Study & Student Assistant Hiring Process

Facilitates Work Authorization Process (in partnership with OISS)

Coordinates all Temporary Direct Hires & Temporary Agency Staffing Needs (screens & interviews temp employees & temp staffing candidates)

HR Coordinator

Oversees & Coordinates all HR Transaction Processing and Workflows

Approves all HR Transactions

Resolves Transactional Problems Related to HR & Payroll Processing

Reviews HRMS Data to Ensure Data Accuracy

Codes & Enters Data into HRMS/Uploads & Indexes into Employee Record

Interprets University Policy Related to Transaction Processing

Compiles Statistical Reports from Various Systems (i.e., metrics, temp employee monitoring of hours, labor reports, etc.)

Monitors cyclical events (i.e., renewals, contract end dates, Visa end dates, etc.)

Oversees Electronic Personnel File Requests via Pipeline, In-person & Email

Conducts Research to Evaluate Employment Services

Partners with Various Central Offices (i.e. payroll, central HR) on payroll & other issues related to transaction processes)

Assists With Roll-out of New HR Systems

Monitors work performed by HR Administrator

HR Administrator

Processes HR Transactions & Employee Changes into Various Systems (Banner, EPAF, Halogen,etc.)

Provide guidance on appropriate paperwork required for processing & assistance related to EPAF's

Interprets University Policy related to HR transactions

Prepares PAR's for Reclassifications

Ensures Data Integrity is Maintained with HRMS/conducts Periodic Audits

Uploads/Indexes Documents to Personnel File

Processes Paperwork for all Termination Reasons (i.e., voluntary, involuntary, RIF, retirement, death, etc.)

Determines Employee's Eligibility to Receive Leave Bank Payout Upon Termination

Enters Degree & Emergency Contact Information into Banner

Enters Volunteer Faculty Assignments in Banner

Assigns Reviews & Supervisor Reassignment/Proxies in Halogen

12 Attachment A

Service Delivery Standards

Human Resources Client Services

SERVICE	SERVICE DELIVERY EXPECTATION	COMMUNICATION STANDARD	SUCCESS MEASURES
Phone Calls and Emails - Urgent - Non-Urgent	Inquiries via phone and email will be responded to within 24 hours of receipt to initiate the first level of response to begin solution(s) planning.	Based upon the inquiry, a determination will be made as to the most appropriate form(s) of return communication (Email, phone, in-person).	Client Satisfaction
Online Hiring System (OHS)	Job Postings: Within 24 hours after receipt of created and budgeted positions (newly created positions may take longer as they need to be approved through TC&W): The Talent Management Coordinator (TMC) will review/approve and post the vacancy announcement. If there is deviation from the standard, the reason for the delay will be communicated to the Hiring Manager and/or Business Affairs Officer (BAO) and documented on the "Notes/History" tab of the posting.	The TMC will notify the Hiring Manager once the posting is open for applicants to apply.	Client Satisfaction – All activity in OHS will be posted in t the "Notes/History" tab and will be monitored for successful service delivery expectation.

Applicant Screening	Within 48 hours from posting close date, postings for represented staff will be screened and (if applicable) a seniority memo and attendance report will be attached to the "Documents" tab of the posting. Any performance reviews and disciplinary actions (from past 2 years) will be forwarded to the Hiring Manager and/or BAO for review.	The TMC will notify the Hiring Manager and/or the BAO via email once the screening process has been completed.	Client Satisfaction – All activity in OHS will be posted in t the "Notes/History" tab and will be monitored for successful service delivery expectation.
Background Checks	Within 24 hours of candidate selection, the TMC will initiate a Background check of the selected candidate(s).	The TMC will notify the Hiring Manager and/or BAO via email once the Background Check results have been received.	Client Satisfaction
Job Offers	Within 24 hours of finalizing hiring recommendation, offers will be extended to the recommended finalist(s).	The TMC will notify the Hiring Manager and/or the BAO via email once the offer has been extended, and then again after receiving a decision from the recommended finalist(s).	Client Satisfaction – All activity in OHS will be posted in t the "Notes/History" tab and will be monitored for successful service delivery expectation.

EPAF	Within 24 hours of receipt of all required transaction related documents, the HR Administrator will load all documents in Application Xtender and then originate the EPAF during apply week. Within 24 hours of receipt in the Approval queue, the HR Coordinator will review/approve the EPAF.	The HR Coordinator will notify the department and/or BAO once the transaction has been approved.	Client Satisfaction The HR Coordinator will create and run regular reports and provide to the HR Director for analysis.
Temporary Employee Monitoring	From February 1st to September 30th, on Thursday of non-apply week (so corrections can be made on current pay). The HR Coordinator will run the temporary employee report to determine which temps are close to the 1,000 hour limitation.	Email notification will be sent to the BAO when the temporary employee has reached between 800 and 900 hours worked and to terminate assignment if/when the employee has reached the 1000 hour limit.	Client Satisfaction
Electronic Personnel File requests via Pipeline Self-Service	Within 48 hours of receipt of an employee's request via Pipeline Self-Service, the HR Coordinator will	Email notifications will be sent via Electronic Personnel File workflow.	Client Satisfaction

	review and release the file.		
HRMS Data Management	Within 48 hours of receipt of a Position Action Request (PAR), the position number will be established for Pooled or Grant funded positions.	Email notification with the newly established position number will be sent to the requestor.	Client Satisfaction
Investigations, Grievances, & Dispute Resolution	Within 24 hours of notification and HR/SrHR Consultant will be assigned to assess and conduct a well planned course of action to achieve the most appropriate objective resolution.	Email, telephone and in-person as most appropriate.	Client Satisfaction

EPAF 1, 2, 3

WAYNE STATE UNIVERSITY

HUMAN RESOURCES

COURSE OVERVIEW

COURSE NAME
Electronic Personnel Action Form 1 (EPAF)

INSTRUCTOR INFORMATION
Les Nolan
Office: (313) 577-9021
Email: lesnolan@wayne.edu

COURSE LENGTH
Three hours

COURSE DESCRIPTION
This course will introduce the participant to the basics of EPAF and the transaction process. Participants will learn about the four critical roles and responsibilities as well as the advantages of using EPAF. Participants will also learn how to complete five different types of personnel transactions, or Approval Categories, using the EPAF process.

- Updating an employee's Home, Timesheet and Check Distribution Code (ORGCD)
- Changing an employee's contract end date (CONDAT)
- Making changes to an employee's labor distribution (LABOR)
- Terminating one of an employee's active assignments (TERM-J)
- Terminating an employee's WSU employment (TERM-E)

This course is a blended learning event. In a computer lab, participants will be led through the eLearning experience by a facilitator and Human Resource subject-matter expert.

LEARNING OBJECTIVES
By the conclusion of this course, partipants will be able to:

- Explain the components of the EPAF process.
- Identify the roles and responsibilities in the EPAF process.
- Explain timing issues within the EPAF apply cycle.
- Monitor the originator's summary page be watchful of transaction returned for correction or rejected by Banner during the apply cycle.
- Set up your Approval Category default Routing Queues.
- Set up a proxy (EPAF Approvers only).

PREREQUISITES
Access to WSU Blackboard and Banner Self-Service Pre-Production 8 are required.

Course Materials

You will need the following course materials:

- Access to Blackboard lesson Electronic Personnel Action Form (Lesson 1)

Course Outline

Lesson 1: Introduction to Electronic Personnel Action Form (EPAF)

Topic 1: What is EPAF?
Topic 2: What does EPAF do?
Topic 3: What are the advantages of EPAF?

Lesson 2: Roles and Responsibilities

Topic 1: Originator
Topic 2: Approver
Topic 3: FYIer (For Your Information)

Lesson 3: EPAF Process

Topic 1: EPAF Process
Topic 2: EPAF Apply Cycle and Calendar)
Topic 3: Transaction Deadlines

Lesson 4: EPAF Terminology

Topic 1: Approval Category
Topic 2: Job Change Reason Code
Topic 3: Query Date
Topic 4: Personnel Date
Topic 5: Routing Queue

Lesson 5: Processing EPAF Transactions

Topic 1: Accessing EPAF
Topic 2: Changing an Organization Code (ORGCDS)
Topic 3: Changing a Contract Date (CONDAT)
Topic 4: Changing a Labor Distribution (LABOR)
Topic 5: Terminating an Assignment (TERM-J)
Topic 6: Terminating Employment at WSU (TERM-E)

Lesson 6: Routing Queues

Topic 1: Set-up
Topic 2: Approval Process

Lesson 7: Processing a Returned for Correction EPAF Transaction

Topic 1: Correcting a Transaction in Error
Topic 2: Resubmitting a Returned Transaction

Successful Completion

To successfully complete this learning program you must meet the following criteria:

- ✓ Attend all instructor-led sessions
- ✓ Participate in instructor-led activities
- ✓ Complete all eLearning as assigned
- ✓ Successfully pass posttests (80% or higher)

Additional Resources

There are several WSU websites available to supplement this course. The websites listed below are not required for this course but are helpful references you can refer to as needed.

- Error and Warning Messages: Descriptions and Resolutions
- EPAF Transaction Deadline Schedule
- Tips for processing EPAF Transactions
- Transaction Management
- Selecting Approval Categories
- Transfer/Separation Checklist (for TERM-J and TERM-E)
- Blackboard Glossary for a list of terms and definitions (located in the Tools link)

WAYNE STATE UNIVERSITY
HUMAN RESOURCES

COURSE OVERVIEW

COURSE NAME
Electronic Personnel Action Form 2 (EPAF)

INSTRUCTOR INFORMATION
Les Nolan
Office: (313) 577-9021
Email: lesnolan@wayne.edu

COURSE LENGTH
Three hours

COURSE DESCRIPTION
This course, EPAF-2, will introduce the participant to three new Approval Categories: JOBDTL, HR-DTL and AT-DTL. This course will also introduce Job Change Reason Codes (JCRE). Job Change Reason Codes (JCRE) are "reasons" why the transaction is taking place. Each Approval Category covered in this lesson is assigned a reason (code) to determine the type of action needed. Participants will learn that there are more than 35 Job Change Reason Codes (JCRE) available and many are completed in a similar fashion. The EPAF system will filter available Job Change Reason Codes (JCRE) when you select the Approval Category

The Job Change Reason Codes (JCRE) covered in this lesson are as follows:.

- Change in Appointment Percentage (CHAPP)
- Salary Adjustment (PASAL)
- Renewal of Appointment (RENEW)

This course is a blended learning event. In a computer lab, participants will be led through the eLearning experience by a facilitator and Human Resource subject-matter expert.

LEARNING OBJECTIVES
By the conclusion of this course, partipants will be able to:

- Change a Job Assignment (JOBDTL) by changing the employee's appointment percentage (CHAPP)
- Change a Job Assignment (JOBDTL) by renewing an appointment (RENEW)
- Change an Hourly Job Assignment (HR-DTL) by adjusting an employee's salary (PASAL)
- Change an Attachment (AT-DTL) by adjusting an employee's wages.

PREREQUISITES
Access to WSU Blackboard and Banner Self-Service Pre-Production 8 are required.

Course Materials

You will need the following course materials:

- Access to Blackboard lesson Electronic Personnel Action Form (Lesson 2)

Course Outline

Lesson 1: Changes to Existing Assignments

Topic 1: Approval Categories for Changing Assignments

Topic 2: Job Change Reason Codes for Changing Assignments

Lesson 2: Common Job Change Reason Codes

Topic 1: Change of Appointment Percent (CHAPP)

Topic 2: Renewal of Appointment (RENEW)

Topic 3: Joint Appointment (CHJOI)

Topic 4: Course Cancel Comp Fee (PTCAN)

Successful Completion

To successfully complete this learning program you must meet the following criteria:

- ✓ Attend all instructor-led sessions
- ✓ Participate in instructor-led activities
- ✓ Complete all eLearning as assigned
- ✓ Successfully pass posttests (80% or higher)

Additional Resources

There are several WSU websites available to supplement this course. The websites listed below are not required for this course but are helpful references you can refer to as needed.

- Error and Warning Messages: Descriptions and Resolutions
- EPAF Transaction Deadline Schedule
- Tips for processing EPAF Transactions
- Transaction Management
- Selecting Approval Categories
- Transfer/Separation Checklist (for TERM-J and TERM-E)
- Blackboard Glossary for a list of terms and definitions (located in the Tools link)

WAYNE STATE UNIVERSITY
HUMAN RESOURCES

COURSE OVERVIEW

COURSE NAME
Electronic Personnel Action Form 3 (EPAF)

INSTRUCTOR INFORMATION
Les Nolan
Office: (313) 577-9021
Email: lesnolan@wayne.edu

COURSE LENGTH
Three hours

COURSE DESCRIPTION
This course, EPAF-3, will introduce participants to ID, CAMPUS, NEWPOS, HR-POS and AT-POS Approval Categories.

The Job Change Reason Codes (JCRE) covered in this lesson are as follows:.

- Renewal of Appointment (RENEW)
- Appointment (HIAPP)

This course is a blended learning event. In a computer lab, participants will be led through the eLearning experience by a facilitator and Human Resource subject-matter expert.

LEARNING OBJECTIVES
By the conclusion of this course, partipants will be able to:

- Create or edit Biographical and Address Information (ID)
- Create or edit Campus Address Information (CAMPUS)
- Create a New Hire or Assign to a New Position (NEWPOS) for an employee's first job, first job with benefits or rehired after a 3-year separation (HIAPP)
- Create a New Hire or Assign to a New Position (NEWPOS) and Renew an Appointment for PTF (RENEW)
- Assign a New Position or service (ADDIT) to an hourly employee (HRPOS)
- Create a New Attachment (HIAPP) for an existing employee (AT-POS)

PREREQUISITES
Access to WSU Blackboard and Banner Self-Service Pre-Production 8 are required.

Course Materials

You will need the following course materials:

- Access to Blackboard lesson Electronic Personnel Action Form (Lesson 3)

Course Outline

Lesson 1: New Hire or Assignment to New Position

Topic 1: Approval Categories for Changing Assignments

Topic 2: Job Change Reason Codes for Changing Assignments

Lesson 2: Common New Assignment Job Change Reason Codes

Topic 1: Appointment (HIAPP)

Topic 2: Reappointment/Rehire (HIREA)

Topic 3: Renewal of Appointment (RENEW)

Topic 4: Additional Service (ADDIT)

Successful Completion

To successfully complete this learning program you must meet the following criteria:

- ✓ Attend all instructor-led sessions
- ✓ Participate in instructor-led activities
- ✓ Complete all eLearning as assigned
- ✓ Successfully pass posttests (80% or higher)

Additional Resources

There are several WSU websites available to supplement this course. The websites listed below are not required for this course but are helpful references you can refer to as needed.

- Error and Warning Messages: Descriptions and Resolutions
- EPAF Transaction Deadline Schedule
- Tips for processing EPAF Transactions
- Transaction Management
- Selecting Approval Categories
- Transfer/Separation Checklist (for TERM-J and TERM-E)
- Blackboard Glossary for a list of terms and definitions (located in the Tools link)

Tips for processing EPAF Transactions

- ALL PTF Renewals - Job Change Reason RENEW - should be done on the "New Hire or Assign to New Position Number or Suffix, NEWPOS" Approval Category. They have to have either a new Position number or new Suffix for each new assignment.

- Do NOT Generate a Banner ID for any Student Assistant, College Work Study, Graduate Assistant and Medical Resident employees. They should already have gotten a Banner ID when they applied at WSU.

- If a transaction has to be DELETED or VOIDED, as long as it has never successfully Submitted, it can be DELETED instead of voided.

- If a transaction has to be DELETED or VOIDED, if it has successfully Submitted even once, it can only be VOIDED, not deleted.

- Attachments are a two step process. The first step is to do a JOBDTL or NEWPOS transaction to make the changes to the employee's base assignment. The second step is to do a AT-DTL or AT-POS transaction to enter/update the Attachment information. The Job Change Reason selected should be the same for both the transaction on the base assignment and the transaction on the Attachment.

- If there are two transactions entered with the same Effective Date, the LAST transaction Approved/Applied will supersede the information on the earlier transaction and only the information on the LAST transaction will be listed in the Job Detail on NBAJOBS.

- An EPAF transaction is considered "COMPLETE" when the transaction has applied and the information is posted, and viewable, on PPAIDEN, PEAEMPL and/or NBAJOBS.

- If fields are greyed out and information does not default into the fields as data is entered, do not continue or save the transaction. The browser cookies need to be cleared, following the notes in the training materials, before restarting the transaction.

- Changes in Soft Money (Job Change Reason CHSUB) are a two step process. The first step is to do a JOBDTL transaction to change the Soft Money Indicator. The second step is to do a LABOR transaction to enter Labor information that is causing the change in Soft Money.

- When entering a New Position number if the Classification Title that is showing is not the Classification Title expected, do not continue with the creation of the transaction. Contact Budget to see if they have entered the new Position information and wait until they have updated NBAPOSN and NBAPBUD before restarting the EPAF transaction. This will prevent the creation of an assignment under a Position/Suffix with the incorrrect Classification and the need for terminating that assignment on the Position/Suffix and reentering it again under a new Position/Suffix.

- When processing transactions such as Promotions, Transfers, Reclassification or others that require a new Position Number/Suffix, a TERM-J transaction must be completed and submitted for the current/open assignment before the NEWPOS transaction is created to prevent the employee from getting paid for two assignments at the same time resulting in an overpayment.

- If creating a transaction for a Part-Time Faculty assignment after the semester in which the employee performed the work, enter the assignment under the BW calendar using the begin and end dates of the current pay period as the Contract Dates.

- If creating a transaction for an employee for which the employee performed the work in a pay period that has already completed, enter the assignment using the begin and end dates of the current pay period as the Contract Dates The transaction MUST be approved and applied during that pay period. If it is not, the employee will continue to receive payment for the completed assignment and a termination EPAF transaction will also need to be done during the next deadline period to cease further payments for that assignment. It is important to do the termination during the next deadline period because if the termination is done in the same pay period that the late transaction is created, submitted and/or applied, the employee will not receive payment for the assignment.

- If the Originator is also listed in the Routing Queue to APPROVE the transaction created, any one listed in Approval Levels that are before the Originator/Approver's can not also Approve the transaction. They can only be FYI and if put in the Routing Queue as Approver, they will be systematically changed to FYI, per SunGard documentation. Therefore, if the transaction has Approval Levels 30 & 39 and the Originator is listed to APPROVE at Level 40, Levels 30 & 39 will be FYI for that transaction.

Summary of E-Classes Used in Banner
Job Aide
Effective 3/1/10

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
24	Local 24	Employees (ie: Janitors) represented by Local 24	Positions start with "N"	Rep
7M	517-M	Employees (ie: Custodial Supervisors, etc.) represented by Local 177M	Positions start with "N"	Rep
A2	12 Month Represented Faculty	Faculty (ie: Professors, Lecturers, etc.) represented by the AAUP on the BW 12 Month Calendar	Positions start with "F" or "T"	Rep
A9	9 Month Represented Faculty	Faculty (ie: Professors Lecturers, etc.) represented by the AAUP on the 9M 9 Month Academic Calendar	Positions start with "F" or "T"	Rep
AS	AFSCME	Employees (ie: Custodians, Parking Facility Attendants, Mail Clerks, etc.) represented by AFSCME	Positions start with "N"	Rep
C2	12 Month Chair/Academic Directors	Faculty Administrators (ie: Directors (Academic), Assistant Deans, Division I Athletic Coachs, Chairpersons, etc.) on the BW 12 Month Calendar	Positions start with "F" or "T"	Non-Rep
C9	9 Month Chair/Academic Directors	Faculty Administrators (ie: Directors (Academic), Assistant Deans, Division I Athletic Coachs, Chairpersons, etc.) on the 9M 9 Month Academic Calendar	Positions start with "F" or "T"	Non-Rep
CW	College Work Study	College Work Study Student Assistants	Positions start with "P"	Non-Rep (Hourly/Part-time/Temporary)
D2	12 Month Academic Administrators	Non-Faculty Academic Administrators (ie: Deans, Directors, Academic, etc.) on the BW 12 Month Calendar	Positions start with "F" or "T"	Non-Rep

Summary of E-Classes Used in Banner
Job Aide
Effective 3/1/10

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
D9	9 Month Academic Administrators	Non-Faculty Academic Administrators (ie: Deans, Directors, Academic, etc.) on the 9M 9 Month Academic Calendar	Positions start with "F" or "T"	Non-Rep
ER	Early Retirees	Retirees receiving Early Retirement Benefits	Positions start with "P"	Non-Rep
EX	Executive	Executive Management (ie: President, Vice Presidents, Provost, Chief of Staff, Dean of Students, etc.)	Positions start with "N" or "T"	Non-Rep
F1	NR 9 Month Faculty Under 50%	Employees on the 9M 9 Month Academic Calendar working less than 50% FTE in Faculty classifications that would otherwise be represented by the AAUP (ie: Professor, Lecturer, etc.)	Positions start with "F"	Non-Rep
F2	NR 12 Month Faculty Over 50%	Faculty in classifications that are not represented by the AAUP (ie: Univ Professors, Visiting Professors, etc.) on the BW 12 Month Calendar working 50% or more FTE	Positions start with "F" or "T"	Non-Rep
F9	NR 9 Month Faculty Over 50%	Faculty in classifications that are not represented by the AAUP (ie: Univ Professors, Visiting Professors, etc.) on the 9M 9 Month Academic Calendar working 50% or more FTE	Positions start with "F" or "T"	Non-Rep
FA	NR 12 Month Faculty Under 50%	Employees on the BW 12 Month Calendar working less than 50% FTE in Faculty classifications that would otherwise be represented by the AAUP(ie: Professor, Lecturer, etc.)	Positions start with "F" or "T"	Non-Rep
HP	Hourly PTF	Part-time Faculty paid hourly	Positions start with "P"	Non-Rep (Hourly/Part-Time/Temporary)

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
HX	Housing Local 24	Employees (ie: Handyperson, Housekeeper) employed by the Wayne State University Housing Authority that are represented by Local 24	Position starts with "N"	Rep
MA	Management	Non-executive Management (ie: Directors, Managers, Administrative Assistant Deans, etc.)	Positions start with "N" or "T"	Non-Rep
MC	McGregor (NOT USED)	Was for Employees working at the McGregor Conference Center (ie: Waitresses, Cooks, Concession Attendants, etc.)	Positions start with "P"	
MR	Medical Resident	Medical Residents (ie: Medical Resident 1, Medical Resident 2, Chief Medical Resident, etc.) in the School of Medicine	Positions start with "P"	Non-Rep
NC	Non-rep Clerical	Clerical employees in areas (ie: Human Resources, Board of Governors, etc.) or positions (ie: Executive Secretary, Word Processing Trainer, etc.) that are not represented by the Staff Association Union Local 2071	Positions start with "N" or "T"	Non-Rep
NE	Non-rep Professional Exempt	Professional employees that are not eligible for overtime in areas (ie: Human Resources, General Counsel, etc.) or positions (ie: Research Engineers, Curator, etc.) that are not represented by the Professional and Administrative Union Local 1979	Positions start with "N" or "T"	Non-Rep
NN	Non-rep Professional Non-exempt	Professional employees that are eligible for overtime in areas (ie: Human Resources, Institutional Analysis, etc.) or positions (ie: Public Safety Lieutenants & Sergeant, Training Coordinator, etc.) that are not represented by the Police Officers Labor Council or by the Professional and Administrative Union Local 1979	Positions start with "N" or "T"	Non-Rep

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
OE	Operating Engineer	Facility Engineers in non-supervisory positions (ie: First, Second or Third Class Engineers and Apprentice Engineers) represented by the International Union of Operating Engineers Local 547	Positions start with "N"	Rep
OS	Operating Engineer Supervisors	Facility Engineer Supervisors (ie: Shift Supervisors) represented by the International Union of Operating Engineers Local 574	Positions start with "N"	Rep
P2	PTF (UPTF Excluded)	Additional service Part-time Faculty employees (ie:Part-Time Faculty, Instructional Assistants) that have another WSU position excluded per the UPTF contract article I.B	Positions start with "P"	Non-Rep (Part-time/Temporary)
P5	PTF Non-Instructional (NR)	Part-Time Faculty employees (ie: Part-Time Faculty, Instructional Assistants) that are not teaching or are teaching a non-credit course.	Positions start with "P"	Non-Rep (Part-time/Temporary)
P6	PTF Addtl Svc Instr (NR) w/Ret	Employees represented by the AAUP have an Additional Service Part-Time Faculty teaching assignment	Positions start with "P"	Non-Rep (Part-time/Temporary)
PA	University Public School Admin (NOT USED)	Was for University Public School Administrators	Positions start with "N"	Non-Rep
PE	P&A Exempt	Professional employees (ie: Administrative Assistants Personnel Officers, etc.) that are not eligible for overtime represented by the Professional and Administrative Union Local 1979	Positions start with "N" or "T"	Rep
PN	P&A Non-exempt	Professional employees (ie: Administrative Assistants Personnel Officers, etc.) that are not eligible for overtime represented by the Professional and Administrative Union Local 1979	Positions start with "N" or "T"	Rep

Summary of E-Classes Used in Banner
Job Aide
Effective 3/1/10

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
PS	Public Safety	Employees (ie: Public Safety Officers) represented by the Police Officers Labor Council	Positions start with “N”	Rep
PT	Part time Faculty (Rep)	Part-Time Faculty employees (ie: Part-Time Faculty, Instructional Assistants) represented by UPTF	Positions start with “P”	Rep (Part-time/Temporary)
R2	12 Month Research	Research Employees (ie: Research Assistants, Research Associates, Post-Doctoral Research Fellows, Research Scientists) on the BW 12 Month Calendar	Positions start with “H”	Non-Rep
R9	9 Month Research	Research Employees (ie: Research Assistants, Research Associates, Post-Doctoral Research Fellows, Research Scientists) on the 9M 9 Month Academic Calendar	Positions start with “H”	Non-Rep
S2	12 Month Academic Staff	Academic employees (ie: Academic Advisors, LibrariansUniversity Counselors, Financial Aid Officers, etc.) represented by the AAUP on the BW 12 Month Calendar	Positions start with “A” or “T”	Rep
S9	9 Month Academic Staff	Academic employees (ie: Academic Advisors, Librarians, University Counselors, Financial Aid Officers, etc.) represented by the AAUP on the 9M 9 Month Academic Calendar	Positions start with “A” or “T”	Rep
SA	Staff Association	Employees (ie: Office Clerks, Parking Supervisors, Receptionists, Storekeepers, etc.) represented by the Staff Association Union Local 2071	Positions start with “N” or “T”	Rep
SK	Skilled Trades	Employees (ie: Painters, Plumbers, Carpenters, etc.) represented by the Detroit Building and Construction Trades Council	Positions start with “N”	Rep

Summary of E-Classes Used in Banner
Job Aide
Effective 3/1/10

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
ST	Student Assistant	Student Assistants	Positions start with "P"	Non-Rep (Hourly/Part-time/Temporary)
SU	Substitute Teacher (NOT USED)	Was for University Public School Substitute Employees (ie: Substitute Teachers, Co-curriculum, etc.)	Positions start with "P"	Non-Rep (Hourly/Part-time/Temporary)
TE	Temporary	Hourly Temporary (non-Student) employees (ie: Clerical Temporary, Professional Temporary On-Air Host, etc.)	Positions start with "P"	Non-Rep (Hourly/Part-time/Temporary)
TR	Public School Teacher (NOT USED)	Was for University Public School Academic employees (ie: School Counselors, Teachers, etc.)	Positions start with "N"	Non-Rep
U2	12 Month Graduate Assistant	Graduate Student employees (ie: Graduate Teaching Assistants, Graduate Research Assistants, etc.) represented by the GEOC on the BW 12 Month Calendar	Positions start with "P"	Rep
U9	9 Month Graduate Assistant	Graduate Student employees (ie: Graduate Teaching Assistants, Graduate Research Assistants, etc.) represented by the GEOC on the 9M 9 Month Academic Calendar	Positions start with "P"	Rep

Stipend E-Classes

SD	Stipend Recipient – 9 Month	Non-service stipend payment to fellows or trainees on the 9 Month Academic Calendar **(STIPEND RECIPIENTS ARE NOT EMPLOYEES)**	Position starts with "P"
SE	Stipend Recipient – 12 Month	Non-service stipend payment to fellows or trainees on the 12 Month Calendar **(STIPEND RECIPIENTS ARE NOT EMPLOYEES)**	Position starts with "P"

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
Other E-Classes				
XA	Attachment	Salary attachment for employees on any classification (Attachment totals are included in the salary on the employee's main assignment and the actual Attachment E-Class is unpaid)	Position is "ATTACH"	
XB	Retiree	Retired employees and Surviving Beneficiaries in any classification (Benefits Administration responsible for Retiree and Survivor actions)	Positions RETIRE or SURVIV	
XD	Long-Term Disability	Employees in any classification on Long-Term Disability	Position is LTD001	
XO	Non Paid but Benefitted	Employees receiving Cobra Benefits (Benefits Administration responsible for Cobra actions)	Position is COBRA	
VO	Voluntary Faculty	Voluntary Faculty employees (ie: Clinical Professors, Instructors (FTA), Adjunct Assistant Professor, etc.)	NO POSITION NUMBER	
HC	Housing Clerical (NOT USED)	Clerical Employees (ie: Office Services Clerk II, Accounting Clerk Senior, etc.) employed by the Wayne State University Housing Authority	Position starts with "N"	Non-Rep
HE	Housing NR Professional Exempt (NOT USED)	Professional employees (ie: Community Director, Housing Assignments Coord., etc.) employed by the Wayne State University Housing Authority that are not eligible for overtime	Position starts with "N"	Non-Rep

E-CLASSES	E-CLASS DESCRIPTIONS	E-CLASS EXPLANATIONS	E-CLASS POSITION NUMBERS	
HK	Housing Student Assistants (NOT USED)	Student Assistants employed by the Wayne State University Housing Authority	Position starts with "P"	Non-Rep (Hourly/Part-time/Temporary)
HT	Housing Technicians (NOT USED)	Hourly Technician employees (ie: Housing Non Rep Clerical Tech) employed by the Wayne State University Housing Authority	Position starts with "P"	Non-Rep (Hourly/Part-time/Temporary)
HU	Housing Union Local 24 (NOT USED)	Employees (ie: Handyperson, Housekeeper) employed by the Wayne State University Housing Authority that are represented by Local 24	Position starts with "N"	Rep

Summary of Active Job Change Reasons
Job Aide
Effective 3/1/10

JOB CHANGE REASON CODE	JOB CHANGE REASON CODE DESCRIPTION	JOB CHANGE REASON CODE EXPLANATIONS	JOB CHANGE REASON CODE ASSOCIATED WITH PERSONNEL ASSIGNMENT TYPES
ADDIT	Additional Service	Use if employee already has an active primary assignment and is receiving additional secondary active assigments.	Hourly, Part-Time Faculty
CHAPP	Change in Appointment Percent	Use for any change in the Appointment Percentage of an active assignment that is not part of a Renewal, Leave or Change in Classification Title.	Academic, Executive, Non-Academic, Research
CHASG	Change in Assignment	Use for all changes to the department, time sheet organization and any other change that DOES NOT affect Classification Title, Subsidy or Money for an active assignment. **Do not use this code if the change is a correction to the original action.**	ALL
CHJOI	Joint Appointment	Use if the employee is receiving a Joint Appointment within the same E-Class that does not affect Money.	Academic
CHREC	Return from Temp Reclass	Use if the employee is Returning from a Temporary Classification Title back to their originial Classification Title.	Non-Academic
CHSFT	Change in Shift	Use for any changes in Shift Differential for an employee (days, afternoons, midnights, 7 day operations).	Non-Academic
CHSUB	Change in Subsidy	Use for if an active assignment is going on or off soft money, but has no other changes.	Academic, Non-Academic, Research
CHSYR	Change in Service Yr/9-12 or 12-9	Use for any change from a 9 month assignment to a 12 month assignment OR from a 12 month assignment to a 9 month assignment when the previous assignment has not yet been closed down for any reason	Academic, Graduate Assistants, Research
CJDOW	Demotion/ Downgrade	Use for any Demotion or Downgrade in Classification Title that is not due to a classification audit.	Non-Academic
CJINT	Change in Interim/Acting	Use if the employee begins or ends an Interim or Acting Administrative assignment.	Academic, Executive
CJPRO	Promotion	Use for Promotions.	Academic, Executive, Non-Academic

JOB CHANGE REASON CODE	JOB CHANGE REASON CODE DESCRIPTION	JOB CHANGE REASON CODE EXPLANATIONS	JOB CHANGE REASON CODE ASSOCIATED WITH PERSONNEL ASSIGNMENT TYPES
DCCOR	Data Correction	Use for corrections to an original transaction where an incorrect position number and/or an incorrect classification title was used. This job change reason may also be used to change position numbers. DO NOT use this Job Change Reason to correct salary, appointment percent or contract dates to the employee's assignment.	ALL
DCONV	Data Conversion	This code is entered systemmatically for mass conversions of data.	ALL
HIAPP	Appointment	Use for an employee's first job ever at the University; for an employee's first job with Benefits; or if the employee is returning to the University after a separation of at least three years.	ALL
HIREA	Reappointment/ Rehire	Use if the employee is returning to the University after a separation for any time period less than three years. **EXCEPTION:** DO NOT use if the employee to a Part-Time Faculty position within three years of their last Part-Time Faculty assignment.	Academic, Executive, Graduate Assistants, Hourly, Non-Academic, Research
JBCAN	Job Cancelled	Use for any Part-Time Faculty assignment that gets cancelled.	Part-Time Faculty
JESAB	Sabbatical End and/or Cancel	Use if an employee's Sabbatical Leave of Absence is cancelled or is ending before the approved end date of the Leave.	Academic
LFMLA	FMLA Leave	Use for any type of approved Family Medical Act Leave of Absence.	Academic, Executive, Non-Academic
LOOFF	Layoff	Use for layoffs.	Academic, Non-Academic
LPADM	Administrative Leave	Use for any Administrative Leave of Absence with pay.	Academic, Executive
LPSAB	Sabbatical Leave	Use for any Sabbatical Leave of Absence with pay.	Academic
LPSTD	Short Term Disability	Use if the employee is approved for Short-Term Disabilty.	Academic, Executive, Non-Academic
LRRET	Return from Leave of Absence	Use for all Returns from Leave of Absence, except for early returns from Sabbatical Leaves.	Academic, Executive, Non-Academic

JOB CHANGE REASON CODE	JOB CHANGE REASON CODE DESCRIPTION	JOB CHANGE REASON CODE EXPLANATIONS	JOB CHANGE REASON CODE ASSOCIATED WITH PERSONNEL ASSIGNMENT TYPES
LTD	Job Terminated to LTD	Use if the employee is approved for Long-Term Disability.	Academic, Executive, Non-Academic
LWOP	Leave of Absence without pay	Use for any type of Leave of Absence without pay that is not an approved Family Medical Act Leave.	Academic, Executive, Medical Residents, Non-Academic
LWPAY	Leave of Absence with Pay	Use for any Leave of Absence with pay EXCEPT Administrative, Sabbatical or Short-Term Disability Leaves of Absence.	Academic
MAEND	Terminated Programmatically	This code is entered systemmatically when an employee's assignment ends at the end of their contract period and no other Termination or Renewal has been received or entered. **Do not enter this code manually.**	ALL
MASAL	Mass Salary Change	This code is entered systemmatically for Mass Salary increases.	ALL
MONOV	Money Data Correction - Overpaid	Use for any correction to the original action which resulted in the employee getting overpaid.	ALL
MONUN	Money Data Correction - Underpaid	Use for any correction to the original action which resulted in the employee getting underpaid.	ALL
PAAMO	Change in Amount per Term	Use for any adjustment in salary for Part-time Faculty during an active semester.	Part-Time Faculty
PAEQU	Equity	Use for any Salary Equity Adjustment	(Non-Rep)Non-Academic
PASAL	Salary Adjustment	Use for any Change in Salary that DOES NOT affect Classification Title, Appointment Percentage, or Shift. **Do not use this code to adjust the salary for Part-time Faculty during an active semester.**	Academic, Executive, Graduate Assistants, Hourly, Medical Residents, Non-Academic, Research
PTCAN	Course Cancel Comp Fee	Use when compensating represented Part-Time Faculty for cancelled courses as specified.	Part-Time Faculty

JOB CHANGE REASON CODE	JOB CHANGE REASON CODE DESCRIPTION	JOB CHANGE REASON CODE EXPLANATIONS	JOB CHANGE REASON CODE ASSOCIATED WITH PERSONNEL ASSIGNMENT TYPES
RCLAS	Reclassification	Use for **any** Change in Classification Title EXCEPT Promotions, Demotions, changes between Non-Academic Classification Titles within the same salary grade and changes between benefitted and non-benefitted classifications.	Academic, Executive, Graduate Assistants, Hourly, Non-Academic, Research
REEXT	Extension of Appointment	Use for extensions for Administrative assignments when the employee has a Tenured Academic position.	Academic
RENEW	Renewal of Appointment	Use for any Renewal of Assignment when there is no gap in service. Also use for Part-Time Faculty that are not additional service assignments and when the employee has had a Part-time Faculty assignment within the past three years.	Academic, Graduate Assistant, Hourly, Medical Residents, Part-Time
RLLEA	Renewal/Extension of Leave	Use when an employee is Renewing or Extending any existing Leave of Absence, with or without pay.	Academic, Non-Academic
RTTEM	Temp Reclass	Use if the employee receives a Temporary Change in Classification.	Non-Academic
TERMI	Termination of Employment	Use for any type of termination of job or assignment EXCEPT cancellation of Part-Time Faculty assignments, Layoffs and Long-term Disability.	ALL
TRANS	Transfer	Use if employee is Transferring between School/College/Divisions, if the employee is Transferring Non-Academic Classification Titles within the same Salary Grade or if the employee is changing Departments with in the same School/College/Division that includes a change in Position/Suffix, but not a change in Classification Title or Salary. **Do not use this code if the employee is ONLY changing departments within the same School/College/Division with no other data changes.**	Academic, Non-Academic
TRDEV	Career Development Transfer	Use for any transfer to a Job Title within the same salary band for career development that also includes a salary adjustment,	(Non-Rep)Non-Academic
USCAN	GTA Assgnmnt Cancel Comp Fee	Use when compensating represented Graduate Teaching Assistants for cancelled Spring/Summer semester courses as specified.	Spring/Summer Graduate Teaching Assistants

JOB CHANGE REASON CODE	JOB CHANGE REASON CODE DESCRIPTION	JOB CHANGE REASON CODE EXPLANATIONS	JOB CHANGE REASON CODE ASSOCIATED WITH PERSONNEL ASSIGNMENT TYPES
THE FOLLOWING CODES ARE USED FOR STIPEND PAPERWORK ONLY:			
AWARD	Stipend Award	Use for each Stipend award received by the recipient	
STMOV	Stipend Money Overpaid	Use for any correction on a Stipend award which resulted in the recipient receiving more money than award granted.	
STMUN	Stipend Money Underpaid	Use for any corrections on a Stipend award which resulted in the recipient receiving less money than award granted.	
STCHG	Stipend Change	Use for any correction on a Stipend award that does not involve a correction in the money the person is awarded.	
STEND	Stipend Award Ended	Use to end a Stipend award.	
DO NOT USE FOR MANUAL ADJUSTMENTS IN SALARY. THE FOLLOWING CODES ARE USED MASS SALARY PURPOSES ONLY:			
PAATB	Across the Board	Used within the Mass Salary system for Across the Board salary increases.	
PADDS	Dean/Director Selective	Used within the Mass Salary system for Dean or Director Selective salary increases.	
PALSM	Lump Sum with Retirement	Used within the Mass Salary system for lump sum salary increases that also affects Retirement contributions.	
PALWO	Lump Sum without Retirement	Used within the Mass Salary system for lump sum salary increases that do not affect Retirement contributions.	
PAMAR	Market Rate Adjustment	Used within the Mass Salary system for Market Rate salary adjustments.	
PAMER	Merit	Used within the Mass Salary system for Merit salary increases.	
PAMIN	Minimum Wage Adjustment	Used within the Mass Salary system for Minimum Wage salary adjustments.	
PAPRO	Promotional Increase	Used within the Mass Salary system for AAUP Promotional salary increases.	

JOB CHANGE REASON CODE	JOB CHANGE REASON CODE DESCRIPTION	JOB CHANGE REASON CODE EXPLANATIONS	JOB CHANGE REASON CODE ASSOCIATED WITH PERSONNEL ASSIGNMENT TYPES
PARAN	Salary Range Adjustment	Used within the Mass Salary system for salary adjustments in the Salary Range.	
PASTP	Step Increase	Used within the Mass Salary system for Step salary increases.	
PAUNI	Unit Selective	Used within the Mass Salary system for Unit Selective salary increases.	

JOB CHANGE REASONS NEEDING ACTION BY ESC

Job Change Reason Code	Job Change Reason Code Description	Job Change Reason Code Explanation	Associated Job Groups	Affected E-Classes	Required Banner Forms/Other Processes to Update	Required Update (Indicate specific field)
ADDIT	Additional Service Assignment	Use if employee already has an active primary assignment and is receiving additional secondary active assignments.	Part-Time Faculty	PT, US,	PDADEDN	Union Dues
CHJOI	Joint Appointment	Use if the employee is receiving a Joint Appointment within the same E-Class that does not affect Money.	Academic	A2, A9, C2 C9, F1, F2, F9, FA, XA	PEAFACT	Faculty Action Comment Activity Date (See data entry notes)
CHREC	Return from Temp Reclass	Use if the employee is Returning from a Temporary Classification Title back to their original Classification Title.	Non-Academic	24, 7M, AS, HX, MA, NC, NE, NN, OE, OS, PE, PN, PS, SA, SK, XA	PDADEDN PEAEMPL	Union Dues Seniority Date Adjusted Service Date (See data entry notes)
CHSYR	Change in Service Yr/9-12 or 12-9	Use for any change from a 9 month assignment to a 12 month assignment OR from a 12 month assignment to a 9 month assignment when the previous assignment has not yet been closed down for any reason.	Academic, Graduate Assistants, Research	A2,A9, C2, C9, D2, D9, F1, F2, F9, FA, R2, R9, S2, S9, R2, R9, U2, U9, XA	PDADEDN PEAEMPL	Union Dues Check E-Class
CJDOW	Demotion/ Downgrade	Use for any Demotion or Downgrade in Classification Title that is not due to a classification audit.	Non-Academic	24, 7M, AS, HX, MA, NC, NE, NN, OE, OS, PE, PN, PS, SA, SK	PEAEMPL PDADEDN PEABARG	Seniority Dates Bargaining Seniority Date (SA, PE, PN, AS – If employee stays in same E-Class, ensure there is not a termination date) Adjusted Service Date Union Dues (See data entry notes)

NOTE: **For two-part transaction (TERMJ and HR-POS/NEWPOS) these JCREs are usually used and should match both transactions → CJPRO, CJDOW, CJINT, CHREC, CHSYR, DCCOR, RCLAS, RTTEM*, TRANS**

If your report shows only one transaction with one of the above JCREs, Go to NBIJLST to identify which JCRE was used on the other transaction.

TERMI on the TERM-J should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If an individual went from a benefited to a benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct…

JOB CHANGE REASONS NEEDING ACTION BY ESC

Job Change Reason Code	Job Change Reason Code Description	Job Change Reason Code Explanation	Associated Job Groups	Affected E-Classes	Required Banner Forms/Other Processes to Update	Required Update (Indicate specific field)
CJINT	Change in Interim/Acting	Use if the employee begins or ends an Interim or Acting Administrative assignment.	Academic	A2, A9, C2 C9, D2, D9, EX, F1, F2, F9, FA, MA, S2, S9,XA	PEAEMPL PDADEDN PEAFACT	Check E-Class Union Dues Academic Title, contract dates (See data entry notes)
CJPRO	Promotion	Use for Promotions.	Academic, Non-Academic	24, 7M, A2, A9, AS, C2, C9, D2, D9, EX, F1, F2, F9, FA, HC, HE, HU, MA, MR, NC, NE, NN, OE, OS, P2, PE, PN, PS, S2, S9, SA, SK	PEAFACT PDADEDN PEAEMPL PEABARG	Academic Title, contract dates Union Dues Seniority Date Bargaining Seniority Date (SA, PE, PN, AS – If employee stays in same E-Class, ensure there is not a termination date) Adjusted Service Date (See data entry notes)
DCCOR	Data Correction	Use for corrections to an original transaction where an incorrect position number and/or an incorrect classification title was used. This job change reason may also be used to change position numbers. DO NOT use this Job Change Reason to correct salary, appointment percent or contract dates to the employee's Assignment.	ALL	24, 7M, A2, A9, AS, C2, C9, CW, D2, D9, ER, EX, F1, F2, F9, FA, HC, HE, HK, HP, HT, HU, MA, MR, NC, NE, NN, OE, OS, P2, P5, P6, PE, PN, PS, PT, R2, R9, S2, S9, SA, SK, ST, TE, U2, U9 XA	PDADEDN PEAEMPL	Union Dues Seniority Date Adjusted Service Date First Work Date

NOTE: **For two-part transaction (TERMJ and HR-POS/NEWPOS) these JCREs are usually used and should match both transactions → CJPRO, CJDOW, CJINT, CHREC, CHSYR, DCCOR, RCLAS, RTTEM*, TRANS**

If your report shows only one transaction with one of the above JCREs, Go to NBIJLST to identify which JCRE was used on the other transaction.

TERMI on the TERM-J should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If an individual went from a benefited to a benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct...

JOB CHANGE REASONS NEEDING ACTION BY ESC

Job Change Reason Code	Job Change Reason Code Description	Job Change Reason Code Explanation	Associated Job Groups	Affected E-Classes	Required Banner Forms/Other Processes to Update	Required Update (Indicate specific field)
HIAPP	Appointment	Use for an employee's first job ever at the University; for an employee's first job with Benefits; or if the employee is returning to the University after a separation of at least three years.	ALL	24, 7M, A2, A9, AS, C2, C9, CW, D2, D9, ER, EX, F1, F2, F9, FA, HC, HE, HK, HP, HT, HU, MA, MR, NC, NE, NN, OE, OS, P2, P5, P6, PE, PN, PS, PT, R2, R9, S2, S9, SA, SK, ST, TE, U2, U9 XA	PEAFACT PDADEDN PEAEMPL PPAIDEN (Emergency contact from Employee Data Sheet) PPAGENL (Degree Info. from Employee Data Sheet – for Academic, must have transcript/copy of diploma, etc))	**(See data entry notes)** Union Dues Check E-Class, Seniority Date Adjusted Service Date First Work Date
HIREA	Reappointment/ Rehire	Use if the employee is returning to the University after a separation for any time period less than three years. EXCEPTION: DO NOT use if the employee to a Part-Time Faculty position within three years of their last Part-Time Faculty assignment.	Academic, Graduate Assistants, Hourly, Non-Academic, Research	24, 7M, A2, A9, AS, C2, C9, CW, D2, D9, EX, F1, F2, F9, FA, MA, NC, NE, NN, OE, OS, PE, PN, PS, R2, R9, S2, S9, SA, SK, ST, TE, U2, U9, XA	PEAFACT PDADEDN PEAEMPL PPAIDEN (Emergency contact from Employee Data Sheet)	**(See data entry notes)** Union Dues Check E-Class, Hire Dates Seniority Date Adjusted Service Date
JBCAN	Job Cancelled	Use for any Part-Time Faculty assignment that gets cancelled.	Part-Time Faculty	PT	PDADEDN	Union Dues
LFMLA	FMLA Leave	Use for any type of approved Family Medical Act Leave of Absence.	Academic, Non-Academic	24, 7M, A2, A9, AS, C2, C9, D2, D9, EX, F1, F2, F9, FA, MA, NC, NE, NN, OE, OS, PE, PN, PS, R2, R9, S2, S9, SA, SK	PEAFMLA	(See Data Entry Notes)

NOTE: **For two-part transaction (TERMJ and HR-POS/NEWPOS) these JCREs are usually used and should match both transactions → CJPRO, CJDOW, CJINT, CHREC, CHSYR, DCCOR, RCLAS, RTTEM*, TRANS**

If your report shows only one transaction with one of the above JCREs, Go to NBIJLST to identify which JCRE was used on the other transaction.

TERMI on the TERM-J should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If an individual went from a benefited to a benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct...

JOB CHANGE REASONS NEEDING ACTION BY ESC

Job Change Reason Code	Job Change Reason Code Description	Job Change Reason Code Explanation	Associated Job Groups	Affected E-Classes	Required Banner Forms/Other Processes to Update	Required Update (Indicate specific field)
MONUN	Money Data Correction - Underpaid	Use for any correction to the original action which resulted in the employee getting underpaid.	Academic, Graduate Assistants, Research,	A2,A9, PT, S2, S9,U2, U9	PDADEDN	Union Dues
PTCAN	Course Cancel Comp Fee	Use when compensating represented Part-Time Faculty for cancelled courses as specified.	Part-Time Faculty	PT	PDADEDN	Union Dues (See data entry notes)
RCLAS	Reclassification	Use for any Change in Classification Title EXCEPT Promotions, Demotions, changes between Non-Academic Classification Titles within the same salary grade and changes between benefitted and non-benefitted classifications.	Academic, Graduate Assistants, Hourly, Non-Academic, Research	7M, A2, A9, AS, C2, C9, CW, D2, D9, EX, F1, F2, F9, FA, MS, NC, NE, NN, OE, OS, PE, PN, PS, R2, R9, S2, S9, SA, SK, ST, TE, U2, U9, XA	PEAEMPL PDADEDN PEAFACT PEABARG	**(See data entry notes)** Seniority Date Bargaining Seniority Date (SA, PE, PN, AS – If employee stays in same E-Class, ensure there is not a termination date) Adjusted Service Date Union Dues Rank Academic Title, contract dates
RENEW	Renewal of Appointment	Use for any Renewal of Assignment when there is no gap in service. Also use for Part-Time Faculty that are not additional service assignments and when the employee has had a Part-time Faculty assignment within the past three years.	Academic, Graduate Assistant, Hourly, Medical Residents, Part-Time Faculty, Research	A2, A9, C2 C9, CW, D2, D9, F1, F2, F9, FA, HP, MR, P2, P5, P6, PT, R2, R9, S2, S9, ST, TE, U2, U9, US, XA	PDADEDN PEAFACT PEAEMPL	Union Dues Seniority Date Adjusted Service Date Tenure Code (See data entry notes)

NOTE: **For two-part transaction (TERMJ and HR-POS/NEWPOS) these JCREs are usually used and should match both transactions → CJPRO, CJDOW, CJINT, CHREC, CHSYR, DCCOR, RCLAS, RTTEM*, TRANS**

If your report shows only one transaction with one of the above JCREs, Go to NBIJLST to identify which JCRE was used on the other transaction.

TERMI on the TERM-J should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If an individual went from a benefited to a benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct...

JOB CHANGE REASONS NEEDING ACTION BY ESC

Job Change Reason Code	Job Change Reason Code Description	Job Change Reason Code Explanation	Associated Job Groups	Affected E-Classes	Required Banner Forms/Other Processes to Update	Required Update (Indicate specific field)
RTTEM	Temp Re-class	Use if the employee receives a Temporary Change in Classification.	Non-Academic	24, 7M, AS, MA, NC, NE, NN, OE, OS, PE, PN, PS, SA, SK, XA	PEAEMPL PDADEDN	Seniority Date Adjusted Service Date Union Dues Degree (See data entry notes)
TERMI	Termination	Use for any type of termination of job or assignment EXCEPT cancellation of Part-Time Faculty assignments, Layoffs and Long-term Disability.	ALL	24, 7M, A2, A9, AS, OE, OS, PE, PN, PS, PT, S2, S9, SA, US, U2, U9	PDADEDN PEIEHIS NBIJLST	Union Dues This JCRE is only used on TERM-E and TERM-J – To check which one it is. Go to PEIEHIS: 1) If there is a termination reason, this is a TERM-E - **No further updates** 2) If there is not a termination reason, this is a TERM –J. Go to NBIJLST: This should be a two-part transaction (TERMJ and HR-POS/NEWPOS) Should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If person went from benefited to benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct…
TRANS	Transfer	Use if employee is Transferring between School/College/ Divisions, if the employee is Transferring Non-Academic Classification Titles within the same Salary Grade or if the employee is	Academic, Non-Academic	A2, A9, C2, C9, CW, D2, D9, F1, F2, F9, FA, MA, NC, NE, NN, PE, PN, S2, S9, SA, XA	PEAEMPL PDADEDN	Seniority Date Adjusted Service Date Union Dues (See data entry notes)

NOTE: **For two-part transaction (TERMJ and HR-POS/NEWPOS) these JCREs are usually used and should match both transactions → CJPRO, CJDOW, CJINT, CHREC, CHSYR, DCCOR, RCLAS, RTTEM*, TRANS**

If your report shows only one transaction with one of the above JCREs, Go to NBIJLST to identify which JCRE was used on the other transaction.

TERMI on the TERM-J should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If an individual went from a benefited to a benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct…

Job Change Reason Code	Job Change Reason Code Description	Job Change Reason Code Explanation	Associated Job Groups	Affected E-Classes	Required Banner Forms/Other Processes to Update	Required Update (Indicate specific field)
		changing Departments with in the same School/College/Division that includes a change in Position/Suffix, but not a change in Classification Title or Salary. **Do not use this code if the employee is ONLY changing departments within the same School/College/Division with no other data changes.**				

NOTE: **For two-part transaction (TERMJ and HR-POS/NEWPOS) these JCREs are usually used and should match both transactions → CJPRO, CJDOW, CJINT, CHREC, CHSYR, DCCOR, RCLAS, RTTEM*, TRANS**

If your report shows only one transaction with one of the above JCREs, Go to NBIJLST to identify which JCRE was used on the other transaction.

TERMI on the TERM-J should only be used for non-benefited positions going to benefited positions (i.e., ST to PE). If an individual went from a benefited to a benefited position (i.e., SA to NN), this JCRE was used incorrectly. Work with unit to correct...

EMPLOYEE CLASS CODES RULES

The primary assignment MUST always match the Employee Class Code listed under Employee Information block

WARNING: Any change in the Employee Class Code may affect a change in the leave accruals and benefits of the person and will terminate any current benefits that are not in the new employee class! If you are in doubt, contact your S/C/D.

RULE #1

If the employee has **only** one assignment that assignment will always be Primary

RULE #2

If the **only** assignment is going to be on an E-Class that is different from the current value, then change it to the new E-Class

RULE #3

These E-Classes will always be Primary*:
24, 7M, A2, A9, AS, C2, C9, ER, EX, F1, F2, F9, FA, HX, MA, MR, NC, NE, NN, 0E, OS, PE, PT*, PN, PS, R2, R9, S2,S9, SA, SD* SE* SK, U2, U9, XB , ER

PT should be the Primary assignment if E-Class is not changing to an E-Class listed above

SD and SE should be the Primary assignment if the E-Class is not changing to an E-Class listed above and is for multiple pays.

RULE #4

These E-Classes will be Primary if the employee does not have a current open assignment under one of the E-classes listed in RULE #3:
CW, HP, P2, P5, P6, ST, TE

RULE #5

If assignment is not Primary, it will be Secondary

RULE #6

9 Month Employees: A9, C9, F1, F9, R9, S9, SD, U9
9 month employees carry benefits during the summer even though their contracts may have ended.
Any additional assignment (including Student Assistant assignments) during the summer should be entered as a Secondary assignment. **DO NOT CHANGE THE PRIMARY E-CLASS**

Summary of Commonly Used Dates in Banner Job Aid

Effective 6/1/05

FORM	DATE FIELD NAME	DATE FIELD DEFINITION	DATE FIELD EXPLANATION
NBAJOBS	Query Date	This is the date used to search for assignment detail.	The date entered in this field will determine what assignments are accessed for viewing. A. To view the most recent assignment action, this date should be the current date. B. To view ALL actions, this date should be a date before conversion. A date of 01-JAN-2000 through 01-OCT-2001 are recommended.
NBAJOBS	Job Begin Date	This is the date within the service period in which the employee begins the very first assignment on a specific position number AND suffix.	This date is used for Payroll and Auditing purposes and is determined as follows: A. If this is a retroactive action for the employee's very first assignment on a specific position, including a specific suffix, this date should be the first day of the service period for the pay date the employee will receive payment. B. If this is a current or future action for the employee's very first assignment on a specific position, including a specific suffix, this date should be the true date the employee's assignment begins.
NBAJOBS	Job End Date	This is the date of the last day of the service period in which an employee ends all assignments on a specific position number AND suffix.	This date is used for Payroll and Auditing purposes and is determined as follows: A. If this is a retroactive action for the employee's last assignment on a specific position, including a specific of the service period for the pay date the employee will receive payment on that specific position number AND suffix. B. If this is a current or future action for the employee's last assignment on a specific position, including a specific suffix, this date should be the true date the employee's

			assignment on that specific position AND suffix ends.
NBAJOBS	Contract Start Date	This is the date an employee's contract starts within the service period in which the employee will first receive payment for that specific contract.	The Contract Start Date MUST BE a date equal to or later than the Job Begin Date and is determined as follow: A. If the employee has a contract and this is a retroactive action for the employee's first assignment on a specific position, including a specific suffix, this date should be the same as the Job Begin Date, which is the first day of the service period for the pay date the employee will receive payment. B. If the employee is on a Visa and this is a retroactive action for the employee's first assignment on a specific position, including a specific suffix, this date should be the same as the Job Begin Date, which is the first day of the service period for the pay date the employee will receive payment. C. If the employee has a contract and this is a current or future action for the employee's first assignment on a specific position, including a specific suffix, this date should be the true date the employee's contract.
			D. If the employee is on a Visa and this is a current or future action for the employee's first assignment on a specific position, including a specific suffix, this date should be the true date the employee's assignment begins. E. If this is a change to an assignment on an existing position and suffix, this date should be the true date the new contract begins. F. All employees in E-Classes CW, ER, HP, PT, P2, P5, P6, PT, SD, SE, U2, U9 and XD MUST have Contract Begin and End Dates. G. All Post-Doctoral Research Fellows MUST have Contract Begin and End Dates.

			H.
NBAJOBS	Contract End Date	This is the date an employee's contract ends.	This date is determined as follows: A. If this is the employee's first assignment on a specific position, including a specific suffix, this contract end date should be the true date the employee's contract ends. B. If the employee is on a Visa, but does not have a contract, this is the date the employee's Visa expires. C. If the employee is on a contract and also holds a Visa that expires BEFORE the contract ends, this is the date the employee's Visa expires.
			D. If the employee is on a contract and also holds a Visa the expires AFTER the contract ends, this is the contract end date. E. If this is a change to an assignment on an existing position and suffix, this date should be the true date the new contract ends. F. All employees in E-Classes CW, ER, HP, P2, P5, P6, PT, SD, SE, U2, U9 and XD MUST have Contract Begin and End Dates. G. All Post-Doctoral Research Fellows MUST have Contract Begin and End Dates.
NBAJOBS	Effective Date	This is the date within the service period in which the employee will receive payment for a specific action.	This date is used for Payroll and Auditing purposes and is determined as follows: A. If this is a retroactive action for the employee's first assignment on a specific position, including a specific suffix, this date should be the first day of the service period for the pay date the employee will receive payment. B. If this is a current or future action for the employee's first assignment on a specific position, including a

			specific suffix, this date should be the true date the employee's appointment begins. C. If this is a retroactive action to change an assignment on an existing position and suffix, this date should be date one day after the last paid date listed on the screen. D. If this is a current or future action to change an assignment on an existing position and suffix, this date should be the true date the change begins.
			E. If this is a retroactive action to change an assignment on an existing position and suffix to a new position and/or suffix, this date should be same date as the last paid date listed on the screen. F. If this is a current or future action to change an assignment on an existing position and suffix to a new position and/or suffix, this date should be the true date the change begins. G. If this is a retroactive action to terminate an existing position and suffix, this date should be same date as the last paid date listed on the screen. H. If this is a current or future action to terminate an existing position and suffix, this date should be the true date the change begins.
NBAJOBS	Personnel Date	This is the true date the action begins.	This is the true effective date of the action, regardless of what service period the action started.
PEAEMPL	Current Hire	This is the date of the employee's most recent hire at WSU.	The date is determined as follows: A. If this is the employee's first position ever at the University, this date should be the date the employee begins employment. B. If the employee has a break in service, this date should be the date of the employee's rehire.

			C. The employee has an active assignment in a classification that is not eligible for Benefits and is appointed to a classification that is eligible to receive Benefits, this date should be the date the employee began in the position in which the employee is eligible to receive Benefits. D. If the employee was terminated from a classification that is not eligible to receive Benefits or Graduate Assistant position and receives a Part-Time Faculty assignment that does not immediately follow a 9 month assignment, this date should be the date the employee began the Part-Time Faculty assignment.
			E. This date is not changed if the employee is changing classifications between positions that are eligible for Benefits with no break in service. F. This date is not changed if the employee returns as Part-Time Faculty within one year of the last Part-Time Faculty assignment held by the employee. G. This date is not changed if the employee is changing classifications between positions that are not eligible for Benefits with no break in service, unless the employee is changing to Part-Time Faculty.
			H. This date is not changed if the employee is hired as Part-Time Faculty with no break in service from a classification that is eligible to receive Benefits. I. This date is not changed if the employee has an active assignment in a classification that is eligible to receive Benefits and is taking an additional assignment in a classification that is not eligible to receive Benefits.
PEAEMPL	Original Hire	This is the date of the person's very first position at WSU as an	The only time this date would reflect the person's first position as Voluntary Faculty, Stipend Recipient or Housing employee

		employee in any classification.	is if the person never takes any position as a paid employee, including a one time only payment, at WSU.
PEAEMPL	Seniority	This field is for the employee's classification seniority date.	Information in this field should reflect the date of the employee's most recent classification change. This field is NOT related to the employee's Bargaining Unit Seniority Date.
PEAEMPL	Adjusted Svc (Adjusted Service)	This field is used to calculate bank accruals.	The date is determined as follows: A. If this is the employee's first position ever at the University, this date should be the date the employee begins employment. B. If the employee has a change in classification from an E-Class with a disability bank to a different E-Class that also has a disability bank, with no break in service, this date should be the date the employee began employment in the first E-Class. C. If the employee has a change in classification from an E-Class without a disability bank to a different E-Class that also does not have a disability bank, with no break in service, this date should be the date the employee begins employment in the first E-Class. D. If the employee has a change in classification from an E-Class that has a disability bank to an E-Class that does not have a disability bank, with no break in service, this date should be the date the employee begins employment in the new E-Class.
			E. If the employee has a change in classification from an E-Class without a disability bank to an E-Class that does have a disability bank, with no break in service, this date should be the date the employee begins employment in the new E-Class. F. If the employee has a break in service of less than three years and was in an E-Class with a disability bank when

			they left and are returning to a classification in an E-Class that also has a disability bank, this date should be the date the employee began employment in the first E-Class, unless adjusted by the Employment Service Center or Provost's Office. G. If the employee has a break in service of less than three years and was in an E-Class without a disability bank when they left and are returning to a classification in an E-Class that also does not have a disability bank, this date should be the date the employee began employment in the first E-Class, unless adjusted by the Employment Service Center or Provost's Office.
			H. If the employee has a break in service of less than three years and was in an E-Class that has a disability bank when they left are returning to a classification in an E-Class that does not have a disability bank, this date should be the date the employee is rehired, unless adjusted by the Employment Service Center or Provost's Office. I. If the employee has a break in service of less than three years and was in an E-Class without a disability bank to an E-Class that does have a disability bank, this date should be the date the employee is rehired, unless adjusted by the Employment Service Center or Provost's Office. J. If the employee has a break in service of three years and one day, this date should be the date the employee is rehired. K. E-Classes with Disability Banks: A2, A9, C2, C9, D2, D9, EX, F2, F9, MA, NE, NN, PA, PE, PN, R2, R9, S2, S9, and TR.
PEAEMPL	First Day	This field is used to calculate	The calculations are done as follows:

	Work	years of service.	A. If this is the employee's first position ever at the University, this date should be the date employee begins employment. B. If the employee was previously employed, but has a break in service of three years and one day or more, this date should be the date the employee is rehired. C. If the employee is going from a current Technician position they have had in the same Home Department for one year or less to a classification with Benefits, this date should be the date that the Technician assignment began. D. If the employee is going from a current Technician position they have had in the same Home Department for one year and one day or more to a classification with Benefits, this date should be the date that the classification with Benefits begins PLUS one year.
			E. If the employee is going from a Technician position that is not in the same Home Department, or any other Temporary or Non-Benefit position, including Stipends, to a classification with Benefits, this date should be the date the classification with Benefits begins. F. If the employee is returning to a full time position within three years, this date should be the date the employee's previous employment began minus the break in service time. G. Time off due to Layoff is subtracted from the date listed on line. H. Any Technician assignments that are not listed above are NOT counted in years of service. I. Part-Time Faculty, Student Assistant, College Work Study, Instructional Assistant, Graduate Assistant and Resident-Physician assignments are NOT counted in

			years of service.
PEABARG	Bargaining Unit Seniority Date	This is the employee's true Bargaining Unit Seniority Date in each specific union.	Each contract is different and, depending on the contract under which the employee is represented, this date MAY be adjusted for the following reasons: A. If the employee had a position out of the specific union and later returned to that union, with no break in WSU service, the time out of the union may be deducted from the employee's total seniority. B. Some leaves of absence may be deducted from the employee's total seniority. C. If the employee worked an assignment at less than 100% time, the fraction of the time not worked MAY be deducted from the employee's total seniority. In these cases, the fraction of time worked would be counted in the employee's total seniority. For example, if the employee worked 3/4 time, the amount deducted would be 1/4 time.
			D. If the employee was laid off and recalled, the time the employee was laid off may be deducted from the employee's total seniority. E. If the employee separtates from the University and is rehired in a classification represented by a Union contract, the employee's previous Bargaining Unit Seniority will be lost and the date of the employee's rehire will become the new Bargaining Unit Seniority.
PEABARG	Bargaining Unit Effective Date	This is the employee's Bargaining Unit Entry Date in each specific union.	This date is determined as follows: A. If the employee is represented by a union, this date is the date the employee was FIRST assigned in a classification represented under each specific union, as long as there is no break in WSU service. B. If the employee separates completely from WSU and is

			rehired in a classification represented under the same union as when the employee left, this date is the date the employee was rehired and the previous Bargaining Unit Effective date will be lost.
PEABARG	Bargaining Unit End Date	This is the employee's End Date of representation in a specific union.	This date is determined as follows: A. If the employee takes an assignment at WSU in a classification represented by a different union than the employee's previous classification. B. If the employee takes an assignment at WSU in a classification that is not represented by any union. C. If the employee separates completely from WSU.
PEABARG	Job Bargaining Unit Seniority Date	This is the date the employee is assigned to each classification and/or specific position number and suffix in each specific union.	The most recent date will not necessarily be the same date as the employee's class seniority date listed on the PEAEMPL form and the date is determined as follows: A. Only the dates the employee was assigned to each classification and/or specific position and suffix in each specific union since conversion to the Banner system are listed. B. If the employee is in the same classification, within a specific union, but the position number and/or suffix changes, the date the employee was assigned to the new position number and/or suffix is listed. C. If the employee takes an assignment at WSU out of the specific union and later returns to that same union, with no break in WSU service, the date the employee returns to a classification in that union is listed.

EPAF REQUIRED DOCUMENT MATRIX
AT-DTL

			E-CLASS
JCRE	**HR DOCUMENT**	**DOC TYPE**	XA
CHJOI	Joint Appointment Offer Letter Appointment Summary Curriculum Vitae (CV)/Resume	Personnel Docs	x
PASAL	Salary Adjustment Approval Memo/Letter	Personnel Docs	x
REEXT	Extension of Appointment Letter	Personnel Docs	x
	Appointment Summary	Personnel Docs	x
RENEW	Appointment Summary	Personnel Docs	x
	Renewal/Offer Letter	Personnel Docs	x
	Curriculum Vitae (CV)/Resume (signed and dated)	Personnel Docs	x
	OISS Clearance Forms ***(ONLY If Foreign National)***	Identity Docs	x
	I9 Employment Eligibility Verification Original Form with Signature ***(ONLY If Foreign National)***	Identity Docs	x

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

Attachment
Academic Only.

EPAF REQUIRED DOCUMENTS MATRIX

AT-POS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

JCRE	HR DOCUMENT	DOC TYPE	E-CLASS XA	NOTE
CHREC CJINT RCLAS RENEW * Used if assignment was not renewed on time via JOBDTL and programatically ended RTTEM	Please refer to NEWPOS Matrix for HR Documents and Doc Type for any of these JCREs			An Attachment will normally be entered either with a NEWPOS transaction or while adding money to an existing Position via JOBDTL. The Attachment does not actually give the employee any money. All it does is provide a placeholder that allows us to track the value of each Attachment.

Attachments
Academic Only

EPAF REQUIRED DOCUMENT MATRIX

HR-DTL

– Hourly Employee

			E-CLASSES				
JCRE	**HR DOCUMENT**	**DOC TYPE**	CW	HP	SK	ST	TE
DCCOR	Data Correction Memo and/or Note to comment box	Personnel Docs		x			
LFMLA	Leave Memo	Personnel Docs			x		
LRRET	Return from Leave Memo	Personnel Docs			x		
LWOP	Leave of Absence without Pay Approval Memo/Letter	Personnel Docs			x		
MONOV	Money Overpayment Memo and/or Note added to comment box	Personnel Docs	x	x	x	x	x
MONUN	Money Underpayment Memo and/or Note added to comment box	Personnel Docs	x	x	x	x	x
PASAL	Salary Adjustment Approval Memo/Letter and/or Note added to comment box	Personnel Docs	x	x	x	x	x
RENEW	OISS Clearance Forms ***(ONLY If Foreign National)***	Identity Docs	x			x	x
	I9 Employment Eligibility Verification Original Form with Signature ***(ONLY If Foreign National)***	Identity Docs	x			x	x
RLLEA	Renewal/Extension of Leave of Absence Approval Memo/Letter	Personnel Docs			x		

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

EPAF REQUIRED DOCUMENTS MATRIX
HR-POS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES				
JCRE	**HR DOCUMENT**	**DOC TYPE**	**CW**	**HP**	**SK**	**ST**	**TE**
ADDIT	Letter of offer *(signed and dated)* Approved exception for Additional Service Assignment (If Primary current active assignment is not **P2, P5, P6 or PT)**	Personnel Doc		x			
	Additional Assignment memo *(If applicable)*		x			x	x
CHREC	Letter/Memo returning employee from temporary classification to original classification title. *(Non-Academic)*	Personnel Doc			x		
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc			x		
CJPRO	Union Dues Forms *(If applicable)*	Personnel Doc			x		
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc			x		
DCCOR	Data Correction Memo *(for corrections to the **original** action that **DO NOT** involve a correction in the money the employee receive)*	Personnel Doc	x	x	x	x	x
HIAPP Appoint	Conditions of Employment for Temporary Employees	Personnel Doc					x
	Requisition for Temporary Employees	Personnel Doc					x
	Temporary Employment Application	Personnel Doc					x
	I9 Employment Eligibility Verification Original Form with Signature	Identity Doc	x	x	x	x	x
	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc	x	x	x	x	x

EPAF REQUIRED DOCUMENTS MATRIX
HR-POS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES				
JCRE	**HR DOCUMENT**	**DOC TYPE**	**CW**	**HP**	**SK**	**ST**	**TE**
	Employee Data Sheet	Personnel Doc	x	x	x	x	x
	Veteran Survey Form *(Optional)*	Equal Opportunity Doc	x	x	x	x	x
HIREA	Conditions of Employment for Temporary Employees	Personnel Doc					x
	Requisition for Temporary Employees	Personnel Doc					x
	Temporary Employment Application	Personnel Doc					x
	I9 Employment Eligibility Verification Original Form with Signature	Identity Doc	x	x	x	x	x
Re-hire Less than 3 yrs.	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc	x	x	x	x	x
	Employee Data Sheet	Personnel Doc	x	x	x	x	x
	Veteran Survey Form *(Optional)*	Equal Opportunity Doc	x	x	x	x	x
MONUN	Money Undepayment Memo *(If applicable)*	Personnel Doc	x	x		x	x
RCLAS	Written Approval Memo by Total Compensation and Wellness office *(Non-Academic only)*	Personnel Doc			x		
	Reclassification Letter/Memo *(If applicable)*	Personnel Doc	x			x	x
RENEW	I9 Employment Eligibility Verification Original Form with Signature	Identity Doc	x	x		x	x
	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc	x	x		x	x

EPAF REQUIRED DOCUMENTS MATRIX
HR-POS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES				
JCRE	**HR DOCUMENT**	**DOC TYPE**	**CW**	**HP**	**SK**	**ST**	**TE**
RTTEM Temp. Reclass.	Temporary Reclassification Written Approval by Total Compensation and Wellness office (Non-Academic Represented)	Personnel Doc			x		
	Union Dues Forms (If applicable)	Personnel Doc			x		

<u>**EPAF REQUIRED DOCUMENT MATRIX**</u>
<u>**JOBDTL**</u>

Full-Time Employees.

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES																																						
JCRE	**HR DOCUMENT**	**DOC TYPE**	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
CHAPP	Change of Appointment Percentage Memo/Letter	Personnel Docs			x	x		x	x	x	x		x	x	x	x	x		x		x	x	x						x	x	x		x	x	x	x	x				
CHJOI	Joint Appointment Offer Letter Appointment Summary Curriculum Vitae (CV)/Resume	Personnel Docs			x	x		x	x	x	x			x	x	x	x																								
CHSFT	Change in Shift Memo/Letter	Personnel Docs	x	x			x														x			x	x				x	x							x				
CHSUB	Letter of Offer	Personnel Docs			x	x		x	x	x	x		x	x	x	x	x		x														x	x	x	x					
CJPRO	Promotion Letter *(i.e., PT-1 to PT-2)*	Personnel Docs																														x									
DCCOR	Data Correction Memo	Personnel Docs																								x	x	x				x									
JESAB	Sabbatical Cancellation/End Memo	Personnel Docs			x	x																													x	x					
LFMLA	Leave Memo	Personnel Docs	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x				
LPADM	Admin Leave of Absence Request Provost Approval Letter/Memo for Admin. Leave of Absence	Personnel Docs						x	x	x	x		x																												
LPSAB	Sabbatical request and Provost Approval Memo/Letter	Personnel Docs			x	x																													x	x					
LPSTD	Short Term Disability Memo	Personnel Docs		x			x														x			x	x												x				
LRRET	Return from Leave Memo	Personnel Docs	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x				
LWOP	Leave of Absence without Pay Approval Memo/Letter	Personnel Docs	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x				
LWPAY	Leave of Absence with Pay Approval Memo/Letter	Personnel Docs			x	x								x	x	x	x																		x	x					
MONOV	Money Overpayment Memo	Personnel Docs	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
MONUN	Money Underpayment Memo	Personnel Docs	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x

EPAF REQUIRED DOCUMENT MATRIX

JOBDTL

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES																																						
JCRE	**HR DOCUMENT**	**DOC TYPE**	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
PAAMO	Letter of Offer *(salary adjustments to term amount)*	Personnel Docs																								x	x	x				x									
PAEQU	Approved Salary Equity Adjustment Form	Personnel Docs								x	x		x						x		x	x	x										x	x							
PASAL	Salary Adjustment Approval Memo/Letter	Personnel Docs	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		x	x	x	x	x			x	x
PTCAN	Class Cancellation Letter/Memo	Personnel Docs																														x									
REEXT	Extension of Appointment Letter	Personnel Docs			x	x		x	x	x	x			x	x	x	x																		x	x					
	Appointment Summary	Personnel Docs			x	x		x	x	x	x			x	x	x	x																		x	x					
RENEW	Appointment Summary	Personnel Docs			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Renewal/Offer Letter	Personnel Docs			x	x		x	x	x	x			x	x	x	x			x													x	x	x	x				x	x
	Curriculum Vitae (CV)/Resume (signed and dated)	Personnel Docs			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	OISS Clearance Forms ***(ONLY If Foreign National)***	Identity Docs			x	x		x	x	x	x			x	x	x	x			x													x	x	x	x				x	x
	I9 Employment Eligibility Verification Original Form with Signature ***(ONLY If Foreign National)***	Identity Docs			x	x		x	x	x	x			x	x	x	x			x													x	x	x	x				x	x
	Certificate of Relevancy **(ONLY GRA or GSA)**	Personnel Docs																																						x	x
RLLEA	Renewal/Extension of Leave of Absence Approval Memo/Letter	Personnel Docs	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x				
STCHG	Stipend Change Memo	Personnel Docs																																				x	x		
STMOV	Overpayment Memo	Personnel Docs																																				x	x		
STMUN	Underpayment Memo	Personnel Docs																																				x	x		

EPAF REQUIRED DOCUMENTS MATRIX

NEWPO

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES																																						
JCRE	**HR DOCUMENT**	**DOC TYPE**	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
ADDIT	Letter of offer (signed and dated) Approved exception for Additional Service Assignment (If Primary current active assignment is <u>not</u> **P2, P5, P6 or PT)**	Personnel Doc																								x	x	x				x									
AWARD	Stipend Payment/Change/Cancellation Request	Personnel Doc																																				x	x		
	Stipend Letter of offer	Personnel Doc																																				x	x		
	Stipend and/or Housing Subsidy Recipient Citizenship Declaration Form	Payroll Doc																																				x	x		
	W8BEN Form *(ONLY If Foreign National)*	Payroll Doc																																				x	x		
CHREC	Letter/Memo returning employee from temporary classification to original classification title. (Non-Academic)	Personnel Doc	x	x			x											x	x		x	x	x	x	x				x	x	x						x				
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc	x	x			x											x	x		x	x	x	x	x				x	x	x						x				
CHSYR	Appointment Summary Form	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Letter of offer *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
	Employment/Award Agreement *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x				x	x
	Curriculum Vitae (CV)/Resume *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Certificate of Relevancy *(GRA and GSA only)*	Personnel Doc																																						x	x
	GEOC Dues Form *(GTA and GSA only)*	Personnel Doc																																						x	x
	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
CIDOW	Promotion/Demotion Form, signed by the Dean or Vice President, to TCW, with a copy to the Business Office for the S/C/D	Personnel Doc																	x		x	x	x																		
	Demotional Transfer Letter/Memo	Personnel Doc	x	x														x						x	x												x				
	Union Dues Forms (If applicable)	Personnel Doc	x	x														x						x	x				x	x	x						x				
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc	x	x														x						x	x				x	x	x						x				

EPAF REQUIRED DOCUMENTS MATRIX

NEWPOS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
			E-CLASSES																																						
CJINT	Appointment Summary Form	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
CJINT	Letter of offer *(signed and date d)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
CJINT	Employment Agreement *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
CJINT	Curriculum Vitae (CV)/Resume *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
CJINT	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
CJPRO	Promotion/Demotion Form, signed by the Dean or Vice President, to TCW, with a copy to the Business Office for the S/C/D *(Non-Academic, Non-Represented)*	Personnel Doc																	x		x	x	x																		
CJPRO	Union Dues Forms *(If applicable)*	Personnel Doc	x	x			x											x						x	x												X				
CJPRO	Promotion Letter *(Non-Represented and Academic)*	Personnel Doc			x	x		x	x	x	x	x	x	x	x	x	x	x		x															x	x					
CJPRO	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc			x	x		x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x												x	x					
DCCOR	Data Correction Memo *(for corrections to the **original** action that **DO NOT** involve a correction in the money the employee receive)*	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
DCCOR	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
	Appointment Summary Form	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Letter of offer *(signed and dated)*	Personnel Doc			x	x		x	x	x	x		x	x	x	x	x		x	x	x	x	x			x	x	x				x	x	x	x	x				x	x
	Employment/Award Agreements *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
	Curriculum Vitae (CV)/Resume *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Chair/Dean Approval	Department Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Certificate of Relevancy *(GRA and GSA only)*	Personnel Doc																																						x	x
	GEOC Dues Form *(GTA and GSA only)*	Personnel Doc																																						x	x
	OEO Hiring Plan Forms *(if applicable)*	Equal Opportunity Doc			x	x		x	x	x	x			x	x	x	x																		x	x					

EPAF REQUIRED DOCUMENTS MATRIX
NEWPO

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

E-CLASSES

JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
HIAPP	Financial Responsibility Form	Finance Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
	Internal Posting	Department Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Letters of recommendation	Department Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Agreement for Reimbusement of Moving Expenses *(If applicable)*	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x				
	Union Dues Forms *(If applicable)*	Personnel Doc	x	x	x	x	x											x						x	x							x					x				
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Department Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
	Official Transcript (if not from WSU) or Degree Waiver	Personnel Doc			x	x		x	x	x	x			x	x	x	x										x					x	x	x	x	x					
	I9 Employment Eligibility Verification Original Form with Signature	Identity Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
	Employee Data Sheet	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
	Veteran Survey Form (Optional)	Equal Opportunity Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
	Appointment Summary Form	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Letter of offer *(signed and dated)*	Personnel Doc			x	x		x	x	x	x		x	x	x	x	x		x	x	x	x	x			x	x	x				x	x	x	x	x				x	x
	Employment/Award Agreements *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
	Curriculum Vitae (CV)/Resume *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
	Chair/Dean Approval	Department Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
	Certificate of Relevancy *(GRA and GSA only)*	Personnel Doc																																						x	x

EPAF REQUIRED DOCUMENTS MATRIX
NEWPOS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

E-CLASSES

JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
HIREA	GEOC Dues Form *(GTA and GSA only)*	Personnel Doc																																						x	x
HIREA	OEO Hiring Plan Form *(if applicable)*	Department Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
HIREA	Financial Responsibility Form	Finance Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
HIREA	Internal Posting	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
HIREA	Letters of recommendation	Department Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
HIREA	Agreement for Reimbusement of Moving Expenses *(If applicable)*	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x				
HIREA	Union Dues Forms *(If applicable)*	Personnel Doc	x	x			x											x						x	x												x				
HIREA	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
HIREA	Official Transcript *(if not from WSU)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
HIREA	Employee Data Sheet	Personnel Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
HIREA	I9 Employment Eligibility Verification Original Form with Signature **(If last completed more than 3 years ago)**	Identity Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
HIREA	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
HIREA	Veteran Survey Form (Optional)	Equal Opportunity Doc	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x			x	x
MONUN	Money Underpayment Memo	Personnel Doc			x	x		x	x	x	x			x	x	x	x			x						x	x	x				x	x	x	x	x				x	x
MONUN	OISS Clearance Forms *(ONLY If Foreign National)* * *If employee's assignment fell off payroll because of visa end date, but original offer letter has a contract date greater than visa end date.*	Identity Doc			x	x		x	x	x	x			x	x	x	x			x						x	x	x				x	x	x	x	x				x	x
	Letter of offer *(signed and dated)*	Personnel Doc																														x									

EPAF REQUIRED DOCUMENTS MATRIX

NEWPO

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

E-CLASSES

JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	A5	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
PTCAN	Employee Data Sheet	Personnel Doc																														x									
PTCAN	Veteran Survey Form *(Optional)*	Equal Opportunity Doc																														x									
PTCAN	I9 Employment Eligibility Verification Original Form with Signature	Identity Doc																														x									
PTCAN	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc																														x									
RCLAS	Written Approval Memo by Total Compensation and Wellness office (Non-Academic only)	Personnel Doc	x	x			x						x					x	x		x	x	x	x	x				x	x	x						x				
RCLAS	Appointment Summary Form	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
RCLAS	Letter of offer *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
RCLAS	Employment/Award Agreement *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x				x	x
RCLAS	Curriculum Vitae (CV)/Resume *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
RCLAS	Chair/Dean Approval	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
RCLAS	Certificate of Relevancy *(GRA and GSA only)*	Personnel Doc																																						x	x
RCLAS	GEOC Dues Form *(GTA and GSA only)*	Personnel Doc																																						x	x
RCLAS	OEO Hiring Plan Forms *(if applicable)*	Equal Opportunity Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
RCLAS	Financial Responsibility Form	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
RCLAS	Internal Posting	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
RCLAS	Letters of recommendation	Department Doc			x	x		x	x	x	x			x	x	x	x																		x	x					

EPAF REQUIRED DOCUMENTS MATRIX
NEWPOS

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES																																						
JCRE	HR DOCUMENT	DOC TYPE	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
	Agreement for Reimbursement of Moving Expenses *(If applicable)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x																		x	x					
	Union Dues Forms (If applicable)	Personnel Doc	x	x	x	x	x											x						x	x												x				
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x				x	x	x		x	x	x	x	x			x	x
	Official Transcript (if not from WSU) or Degree Waiver	Personnel Doc			x	x		x	x	x	x			x	x	x	x																x	x	x	x					
RENEW * Used if assignment was not renewed on time via JOBDTL and programatically ended	Appointment Summary Form	Personnel Doc			x	x																																			
	Letter of offer *(signed and dated)*	Personnel Doc			x	x		x	x	x	x			x	x	x	x			x						x	x	x				x	x	x	x	x					
	Chair/Dean Approval	Personnel Doc			x	x																																			
	Curriculum Vitae (CV)/Resume *(signed and dated)*	Personnel Doc			x	x																																			
	OEO Hiring Plan Forms *(if applicable)*	Equal Opportunity Doc			x	x																																			
	Certificate of Relevancy *(GRA and GSA only)*	Personnel Doc																																						x	x
	I9 Employment Eligibility Verification Original Form with Signature (If applicable)	Personnel Doc			x	x		x	x	x	x			x	x	x	x			x						x	x	x				x	x	x	x	x				x	x
	OISS Clearance Forms *(ONLY If Foreign National)*	Identity Doc			x	x		x	x	x	x			x	x	x	x			x						x	x	x				x	x	x	x	x				x	x
RTTEM	Promotion/Demotion Form, signed by the Dean or Vice President, to TCW, with a copy to the Business Office for the S/C/D - *(Non-Academic, Non-Represented)*	Personnel Doc											x						x		x	x	x																		
	Temporary Reclassification Written Approval by Total Compensation and Wellness office *(Non-Academic Represented)*	Personnel Doc	x	x			x											x						x	x				x	x	x						x				

EPAF REQUIRED DOCUMENTS MATRIX

NEWPC

JCRE = Job Change Reason	
	JCRE NOT APPLICABLE TO ECLAS / NO REQUIRED DOCUMENT
x	JCRE APPLICABLE TO ECLAS / REQUIRED DOCUMENT

			E-CLASSES																																						
JCRE	**HR DOCUMENT**	**DOC TYPE**	24	7M	A2	A9	AS	C2	C9	D2	D9	ER	EX	F1	F2	F9	FA	HX	MA	MR	NC	NE	NN	OE	OS	P2	P5	P6	PE	PN	PS	PT	R2	R9	S2	S9	SA	SD	SE	U2	U9
	Position Action Request Form (PAR) - If position attributes are changing or creating a new position	Personnel Doc	x	x			x						x					x	x		x	x	x	x	x				x	x	x						x				
	Union Dues Forms *(If applicable)*	Personnel Doc	x	x	x	x	x											x						x	x				x	x	x						x				
TRANS	Transfer Letter/Memo	Personnel Doc			x	x		x	x	x	x			x	x	x	x		x		x	x	x						x	x					x	x	x				
TRDEV	Career Development Assignment Transfer Form, signed by the Dean or Vice President, to TCW, with a copy to the Business Office for the S/C/D - (Non-Academic/Non-Represented)	Personnel Doc																	x		x	x	x																		

Data entry post EPAF

Entering Emergency Contact Information for an Employee

This work instruction will aid the user in entering Emergency contact information for employees into the Banner system.

The user will obtain this information from the bottom section of the Employee Data Sheet, entitled: "Person to Notify in Case of Emergency".

Reset Form | Print Form

Employee Data Sheet

WAYNE STATE UNIVERSITY

Employment Service Center
5700 Cass Ave, Suite 1900
Detroit, MI 48202
Phone: 313-577-2010
Fax: 313-577-7505
www.hr.wayne.edu/esc

Date:

New | Revised

Employee's Legal Name: (Last, First, Middle) *(As displayed on SSN/ITIN Card)*

Banner ID:

Date of Birth:

SSN:

Male

Female

Home Address:

City/State/Zip:

Home Phone:

Campus Address:

Campus Phone:

This information is voluntary and will be used for statistical purposes only.

Are you Hispanic or Latino?

- Yes
- No

Marital Status

- Married
- Single

Citizenship

- Citizen
- Non-Citizen
- Permanent Resident

What is your race? (Select one or more):

- AM, Native American/Native Alaskan
- AS, Asian
- BL, Black or African-American
- PH, Native Hawaiian and Other Pacific Islander
- WH, White

In which languages are you fluent?

Person to Notify in Case of Emergency

Name:

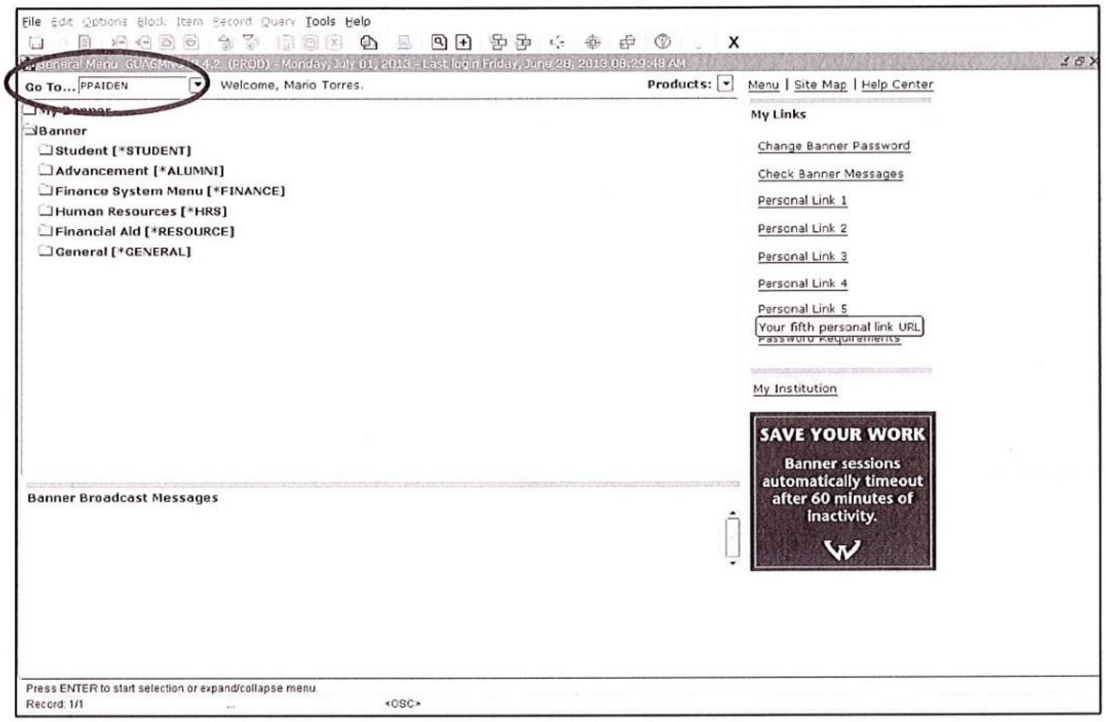
Address:

City/State/Zip:

Phone:

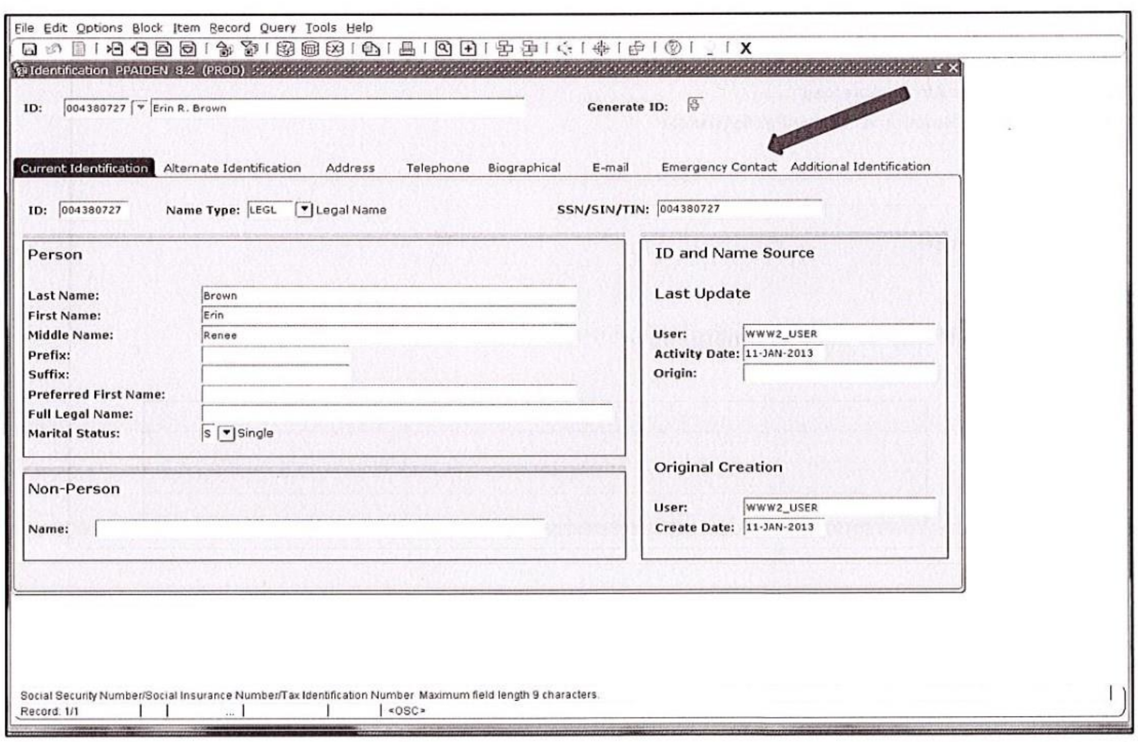
Entering Emergency Contact Information for an Employee

After signing in to Banner, the user will go to the PPAIDEN screen by typing this entry into the text box at the Banner Home Screen:

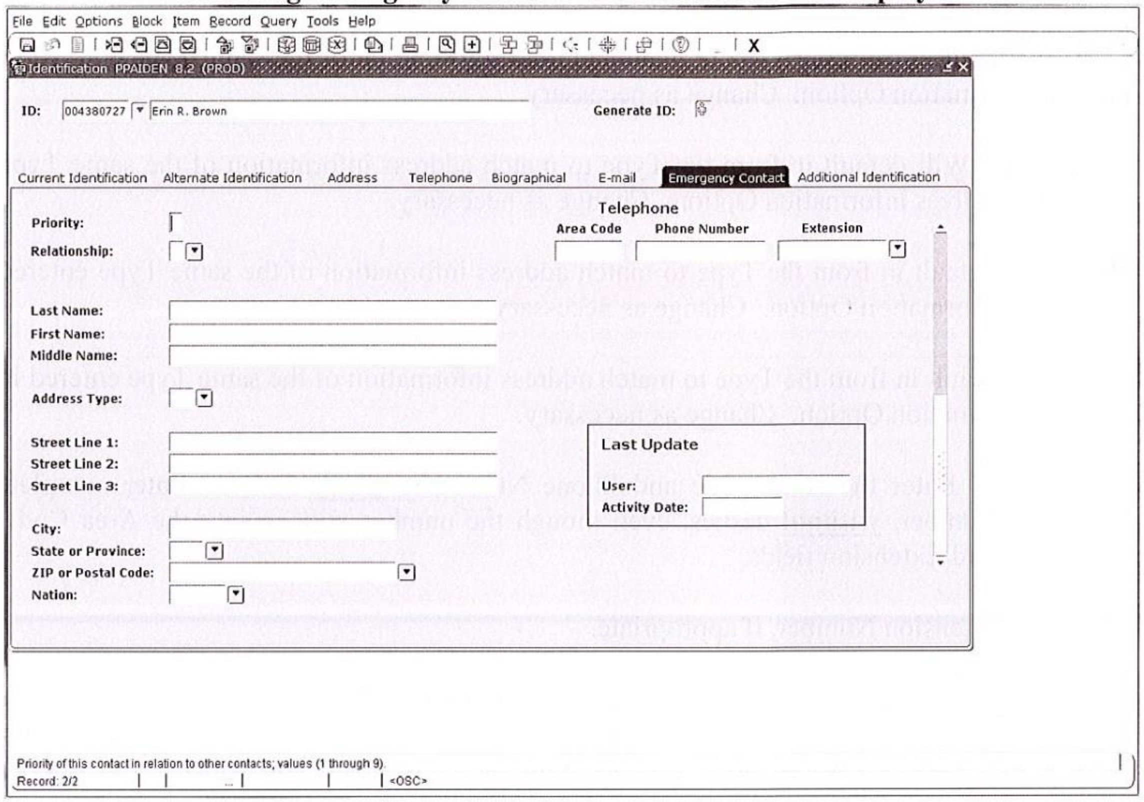


In the PPAIDEN screen, enter the Banner ID of the employee for which the emergency contact information is being entered, then press CTRL+Pg Down to populate the screen

Next, select the "Emergency Contact" tab to navigate to the screen:



Entering Emergency Contact Information for an Employee



Populate the fields with the information obtained from the Employee Data Sheet:

Priority: Enter the Priority Number, if there is only one Emergency Contact, use 1. If more than one Emergency Contact is entered, go in numerical order, 2, 3, etc.

Name: Enter the Name in mixed case. It is OK to have a capital letter in the middle of a name (for example: McDonald).

> **Last Name:** Enter the Surname and suffix, if appropriate.
>
> **First Name:** Enter the First Name. If a person uses only a first initial and a middle name, the initial and the name should be entered here. If they have no first name, enter a Period (.).
>
> **Middle Name:** Enter the Middle initial, if appropriate.

Type: Enter the correct Type code. The most common types used by Employment Service Center staff are:

A. **Home Address:** MA.
B. **WSU Address:** W1.
C. **Business Address:** BU.

Address: Will default in from the Type to match address information of the same Type entered in the Address information Option. Change as necessary.

Entering Emergency Contact Information for an Employee

City: Will default in from the Type to match address information of the same Type entered in the Address information Option. Change as necessary.

State/Province: Will default in from the Type to match address information of the same Type entered in the Address information Option. Change as necessary.

ZIP/PC: Will default in from the Type to match address information of the same Type entered in the Address information Option. Change as necessary.

Nation: Will default in from the Type to match address information of the same Type entered in the Address information Option. Change as necessary.

Phone number: Enter the Area Code and Phone Number **without** dashes. Enter complete foreign Phone Number, **without** dashes, even though the number will go into the Area Code, Phone Number and Extension fields.

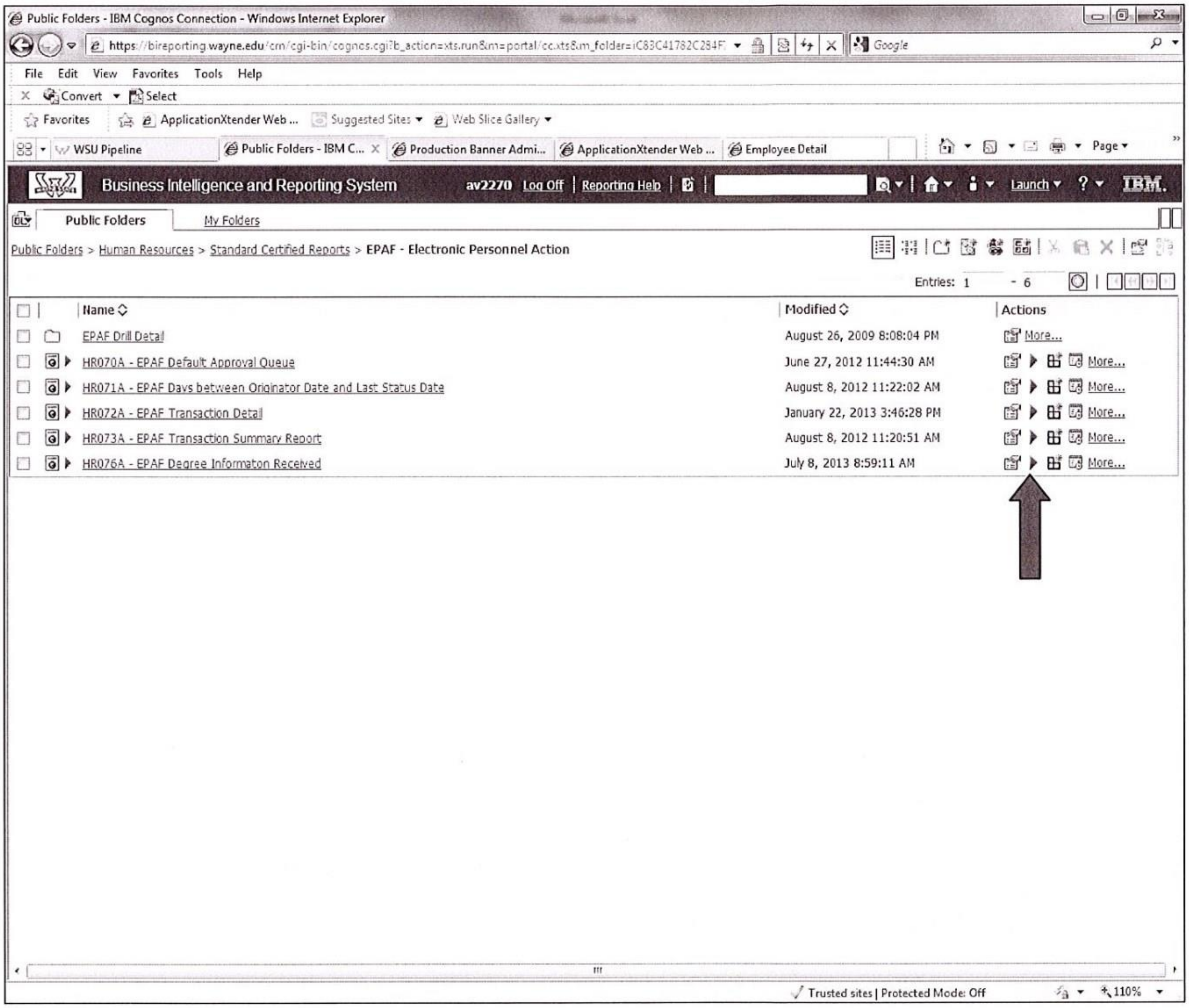
Ext: Enter an Extension Number, if appropriate.

All of the same rules apply for these as for other Addresses and Phone Numbers. It is possible to have more than one, but so long as we are doing central data entry we will not encourage this. However, if the employee wants more than one Emergency Contact, you will need to insert a new record hitting the F6 key or selecting Record from the pull down menu on the top horizontal tool bar and clicking on "Insert".

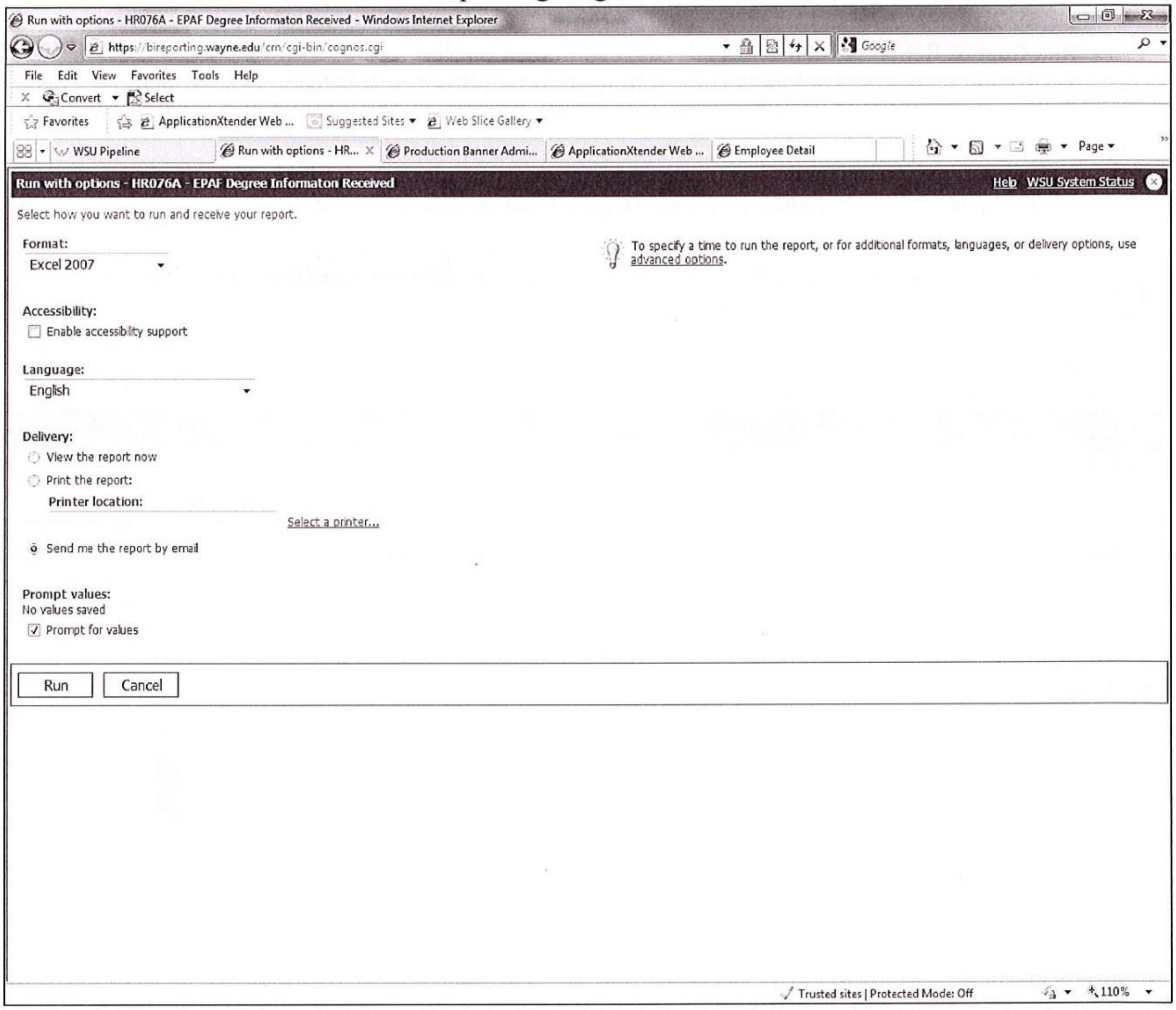
Procedure for Updating Degree Information Received

1. Run Cognos Report HR076A – EPAF Degree Information Received every Monday
    a. To pull up the HR076A, follow the following path in Business Intelligence and Reporting System:

       Public Folders > Human Resources > Standard Certified Reports > EPAF - Electronic Personnel Action> **HR076A - EPAF Degree Information Received**

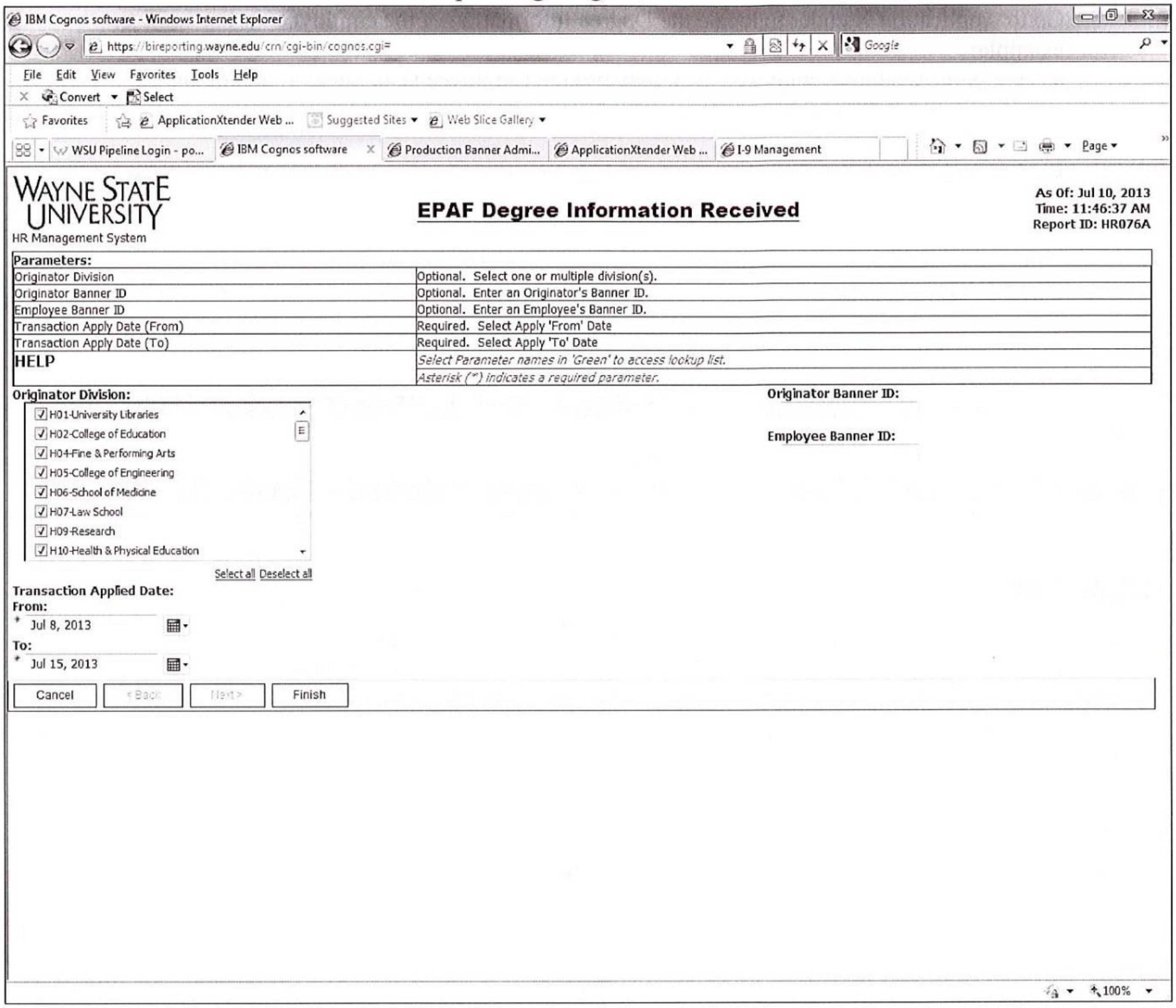


Procedure for Updating Degree Information Received



2. On the Run with Options page:
   a. Select the format by clicking on the drop down arrow and select “Excel 2007”
   b. Skip down to the Delivery method and select the “Send me the report by email” radio button.
   c. Then click the Run button to move on to the prompt page

Procedure for Updating Degree Information Received



3. On prompt page:
   a. Click on the "Select all" for the "Originator Division" (S/C/Ds) section
   b. In the Transaction Applied Date section:
      i. Select previous data entry day in the **'From'** field located Transaction Applied Date section
         1. Example, today is June 6, 2013…you would select **6/6/13**

      ii. Select previous data entry day in the **'To'** field located Transaction Applied Date section.
         1. Example, today is June 7, 2013…you would select **6/7/13**

   c. Click "Finish"
4. After the report runs, it will be sent to your email address.
   a. Save report to your desktop.

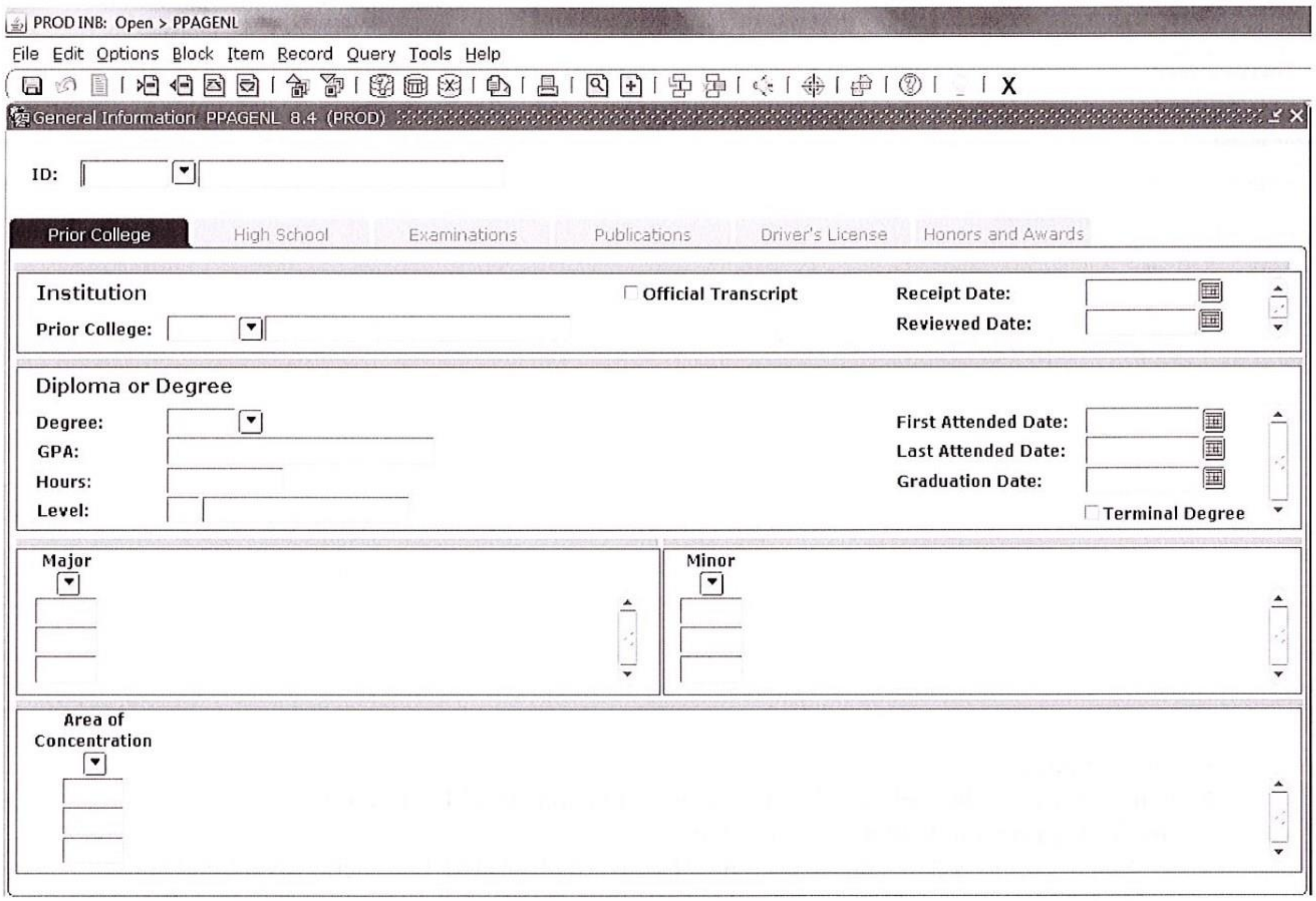
Procedure for Updating Degree Information Received

5. Go to Application Xtender to locate the Degree Information of the employee(s). For example:
   a. For Non-Academic employees you may use the Employee Data Sheet to obtain the degree information as you may not see a copy of their diploma and/or transcript.

   b. For Academic Employees (including PTFs): You must use the transcript and/or diploma information on file.

6. Utilize the **HRMS Banner Data Entry General Person Entering Educational Data PPAGENL** job aid located in the Help System to update the employee's degree information.

7. Login to the Banner system and type "PPAGENL" in the Go To box.

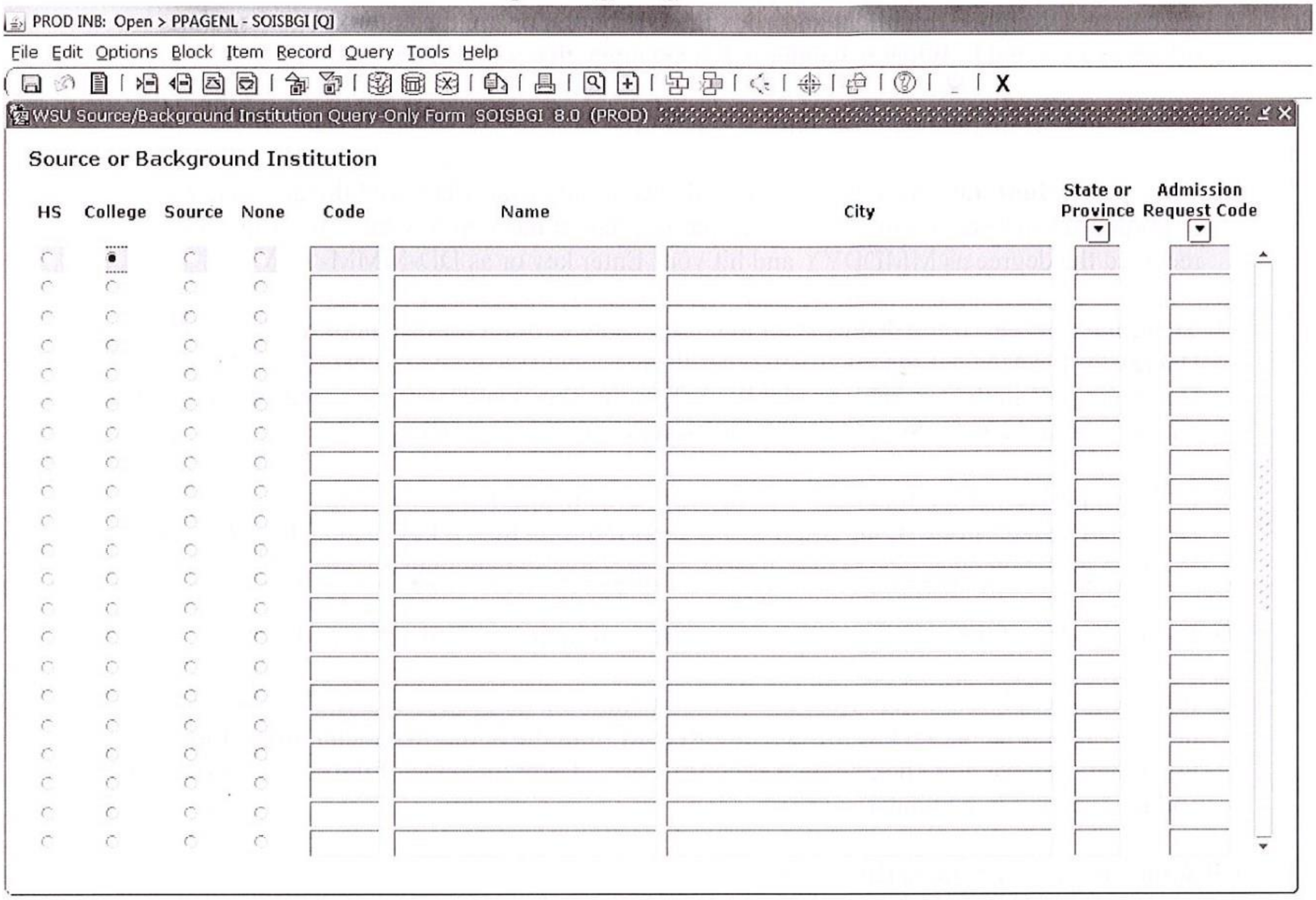


8. Enter the employee's Banner ID or Access ID.

9. Click on the first field the system will allow your cursor to rest or hit the CTRL and Page Down keys at the same time.

10. In the "Prior College" field, enter the code of the institution from which the employee obtained the degree. If you do not know the code, you may search for the institution by clicking on the drop down arrow to begin the search for the institution code.

Procedure for Updating Degree Information Received



11. **Source or Background Information (SBGI) Code:** Enter the Code of the Institution from which the employee obtained the Degree. If you do not know the code, you may search for the institution by pushing the F8 button after and typing in the name of the institution. The following can assist you in the search process:
    a. For US institutions <u>always</u> enter the State Code.
    b. Enter just the U, C, or S for University, College or State with the wildcard (%) before and after and the first letter of the state name (if it is a State University) with the wildcard (%) before and after.
    c. Enter the city the institution is located in, though this can generate a long list that will need to be scrolled through to find the correct institution.

12. When the correct code has been identified, double click on the code to return to the PPAGENL screen. The code will populate in the "Prior College" field. Then press F10 to save this entry into Banner. You will not be able to continue with your entry unless the record has been saved.

13. Click on the first *<u>field</u>* the system will allow your cursor to rest or hit the CTRL & Page Down keys at the same time to access the Diploma/Degree Information section of the screen.

14. **Degree:** Enter the code of the degree received. If you do not know the code, hit the F9 key or double click in the first space in the field. A *<u>pop-up window</u>* will appear. Scroll down to

the correct Discipline, highlight and click the OK button or use the enter key to populate information in field. When you enter a defined code, the degree name will default in.

15. Tab through the remaining areas until you have reached the "Graduation Date" field.

16. **Date of Graduation:** Since the system will accept only exact dates and the date is not important for our needs, enter the date as the last day of the year in which the employee received the degree as MMDDYY and hit your Enter key or as DD-MMM-YYYY.

17. **Terminal degree:** If the degree is a PhD, Law Degree for the Law School or Medical Degree for the Medical school or any other Professional (PR in the Level Code field) or Doctorate (DR in the Level Code Field), click in the Terminal Degree box and a check mark will appear in the box. Save the record to complete the degree entry.

18. IF the employee has another degree from the SAME Institution go back only as far as the Diploma/Degree Information. Insert a new *record* hitting the F6 key or selecting Record from the pull down *menu* on the top horizontal *tool bar* and clicking on ”Insert".

19. Enter the code of the next degree received. Proceed in the same manner as above.

20. If the employee has a degree from a different institution, go back to SBGI Code and insert a new record hitting the F6 key or selecting Record from the pull down menu on the top horizontal tool bar and clicking on ”Insert". Enter the code of the second institution and proceed in same manner as above.

Click on Transcript Information Option:
This screen is only used if you have the official transcript. Because of this window, we will no longer need special codes for employees without transcripts.

Official Transcript: If an official transcript for the highest degree is received, click in the box and a check mark will appear.

The remaining fields are populated by student records, so please skip these fields and save the entry.

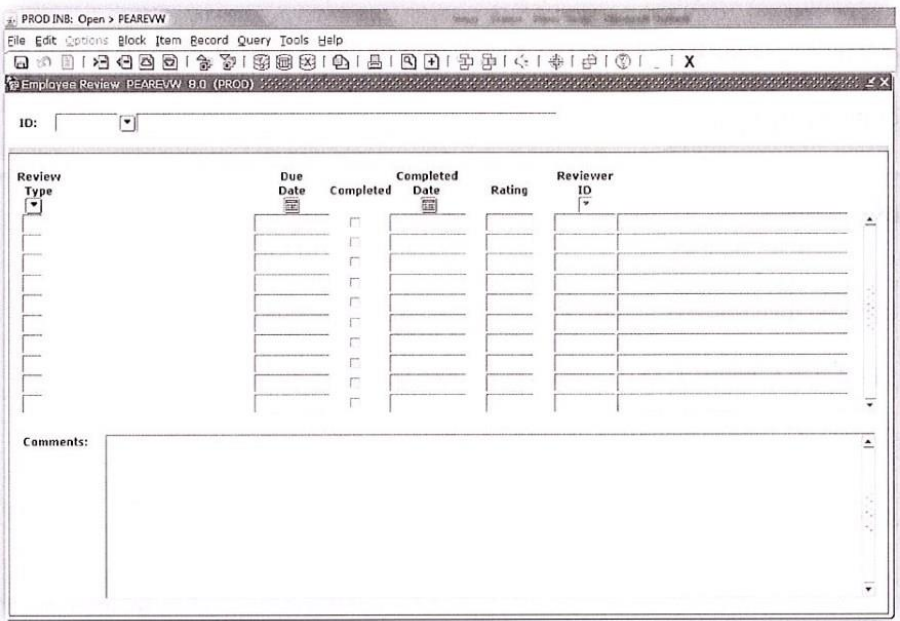
Performance Review Data in Banner – Job Aid

ENTERING PERFORMANCE REVIEW SCORES:

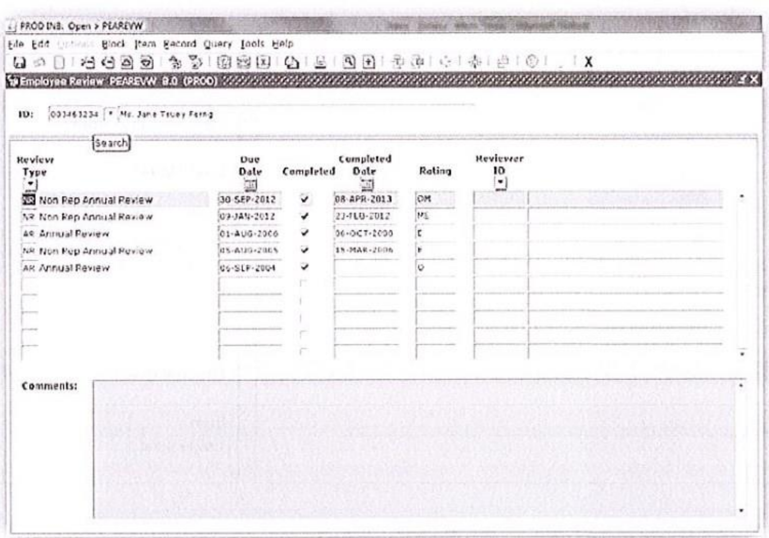
1. Check to make sure the performance review form has:
    a. Banner ID
    b. HRC initials/signature
    c. Overall rating at the top of form

2. Log into Banner

3. Go to **PEAREVW** screen



4. Enter Banner ID (found on form)
    a. Make sure the name that populates in Banner matches form
    b. Hit CTRL + page down



5. Find the review type by clicking the down arrow on the **Review Type** drop down

    a. AR - for Academic & Represented (Due date varies – see schedule)
    b. NR - for Academic Administrators (Due date should be **9/30/yyyy**)
    c. Varies for probationary (see forms)

6. Enter the due date on the **"Due Date"** field

7. Check the **"Completed"** box

8. Enter the date the review was completed in the **"Completed Date"** field
    a. Use date signed by employee and supervisor, or just employee if different

9. Click the **Save** icon or press F10

10. Repeat 1 -9 for next employee review

XTENDER INDEXING STEPS:

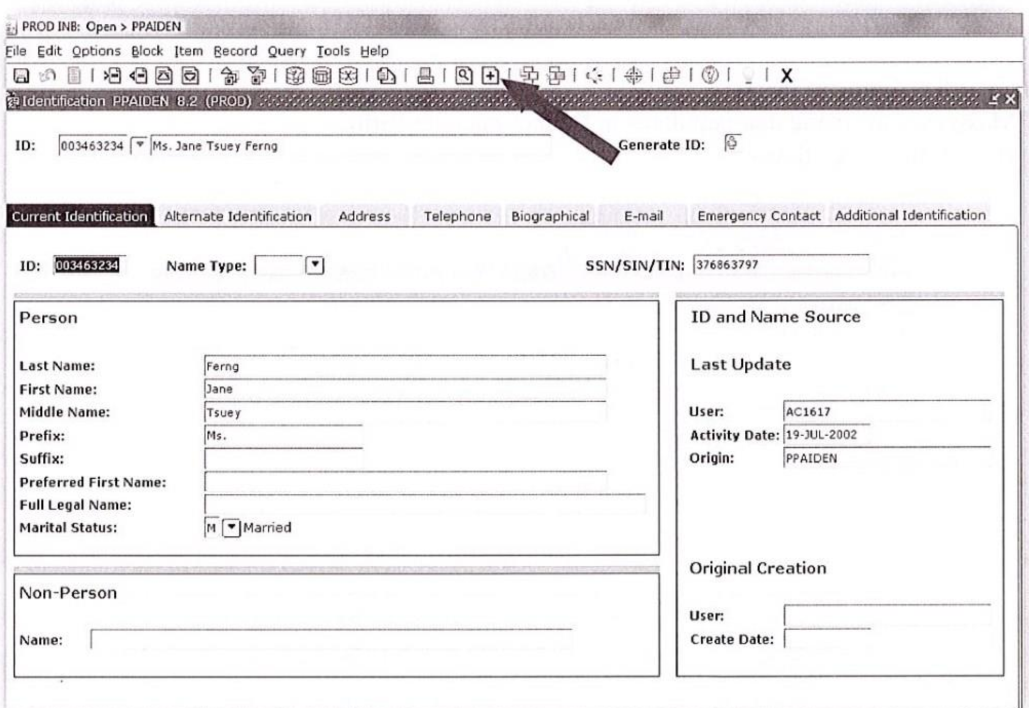
Once the review scores have been data-entered

1. Scan several performance reviews at a time

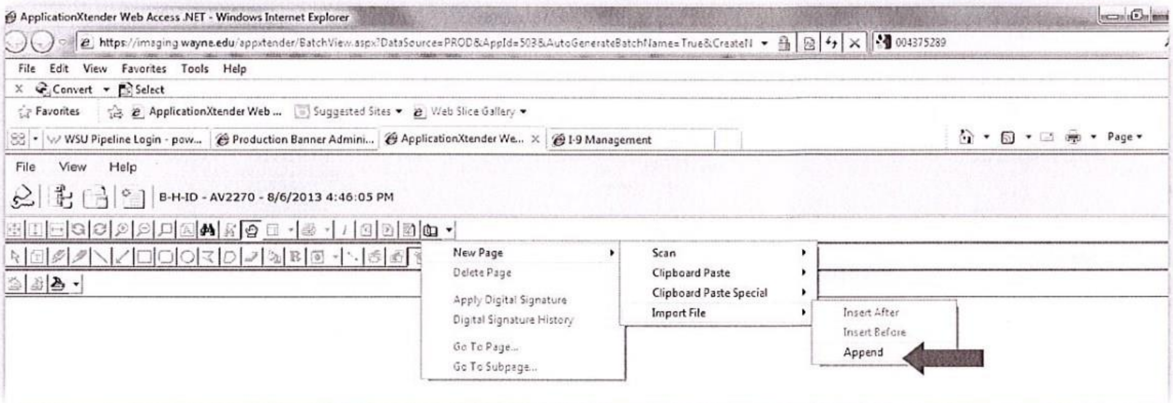
2. Open Banner, PPAIDEN form

3. Enter Banner ID for first employee in the stack.

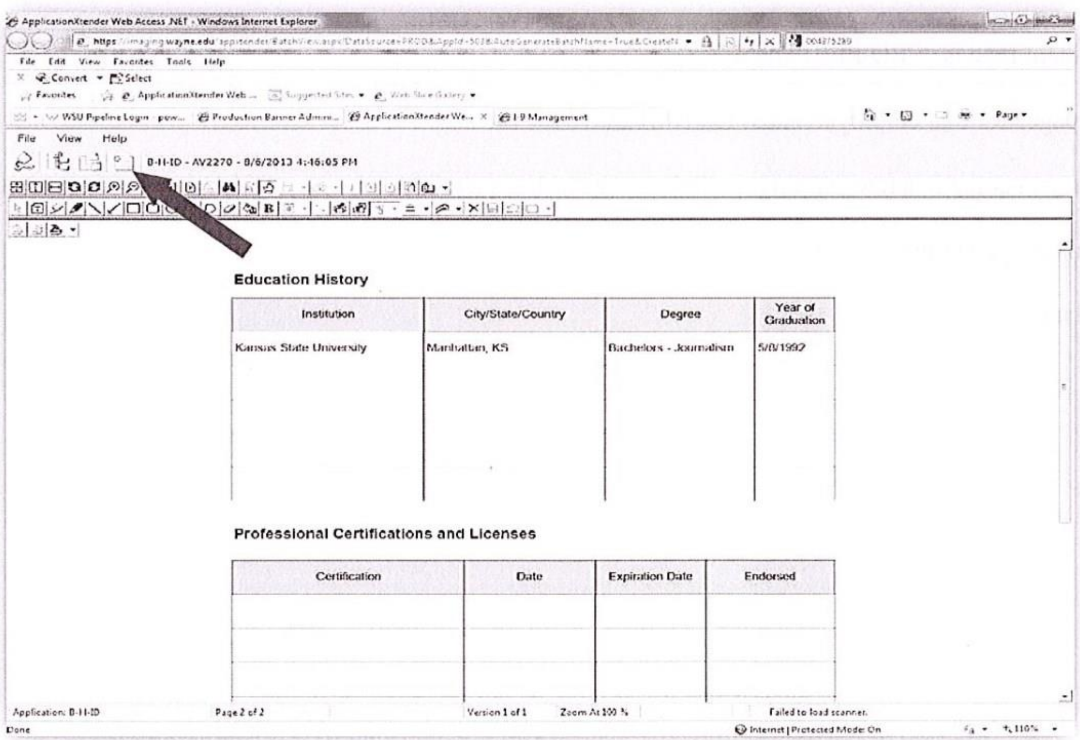
4. Click on the green "plus" icon.



5. Upload document

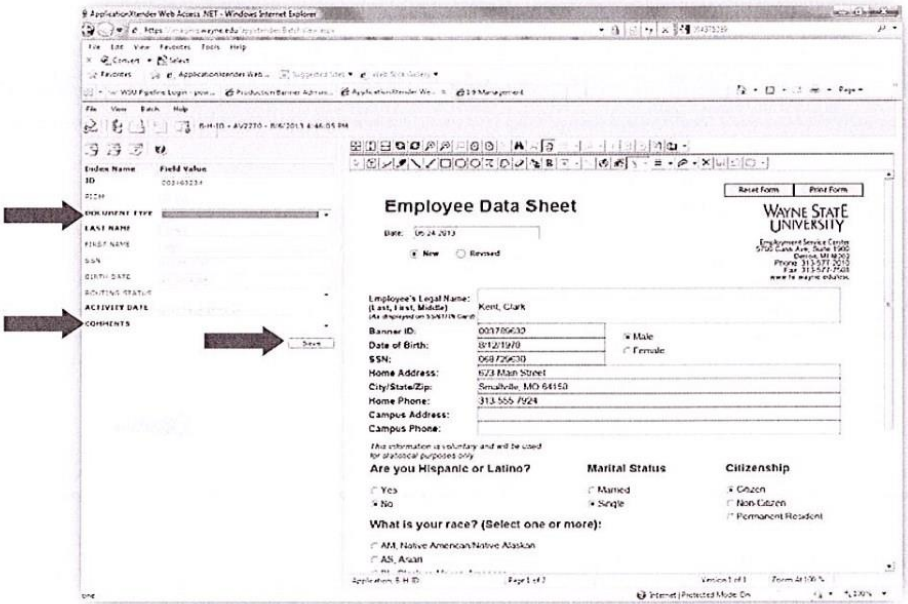


6. Click on "new document" icon (paper with orange sun icon).



Performance Review Data in Banner – Job Aid

7. Doc type is "Personnel Document"



8. Comment type is "PED-PERFORM".

9. Add pages for that employee individually and save the record.

10. When you come to a new employee, click the "new document" icon (paper with orange sun icon).

11. Manually type in the new employee's Banner ID.

12. Repeat steps 5-10.

Performance Review Data in Banner – Job Aid

ENTERING FUTURE REVIEW DUE DATE FOR PROBATIONARY AND PROVISIONAL EMPLOYEES

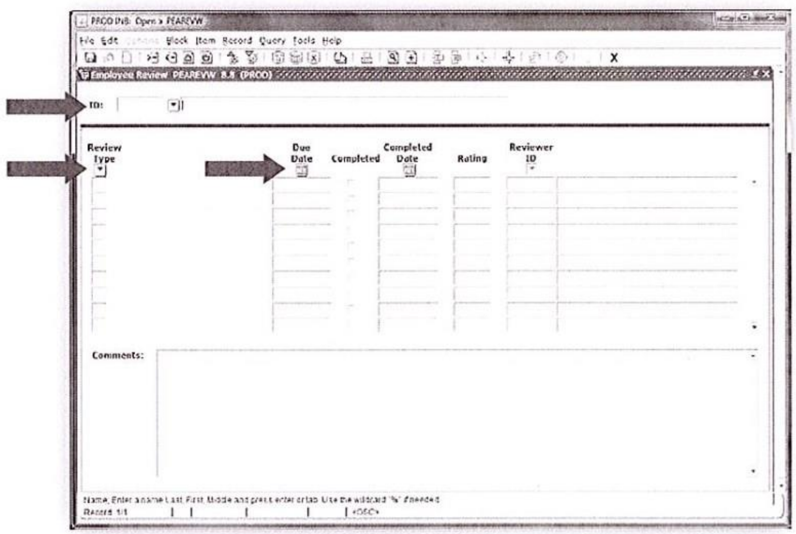
1. Enter employee's Banner ID

2. Select the appropriate **'Review Type'** from the drop down. For Probationary and Provisional reviews see below for list of review types for probationary and provisional reviews:

Probationary and Provisional Review Types:

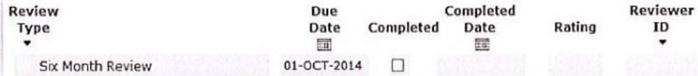
30 - Thirty Day Review
45 - Forty-Five Day Review
60 - Sixty Day Review
6R - Six Month Review
90 – Ninety Day Review

3. Enter the Review Due Date in the **'Due Date'** field



4. Save.

Sample: *Transaction should look like image below when completed*



Review Type	Due Date	Completed	Completed Date	Rating	Reviewer ID
Six Month Review	01-OCT-2014	☐			

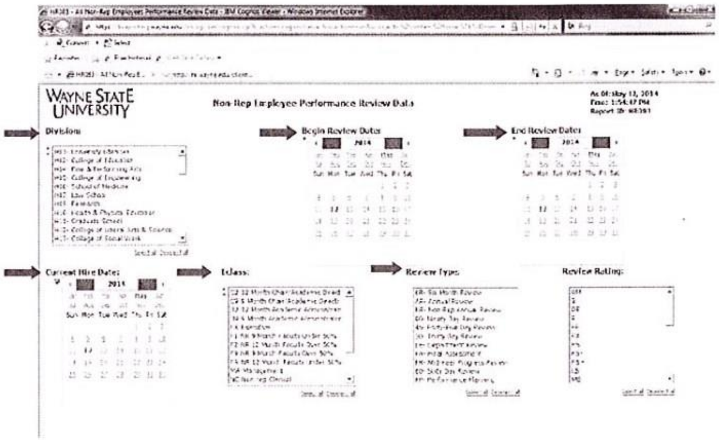
Performance Review Due Date Audit for Probationary and Provisional Employees

1. For the appropriate employee group, run the following Cognos Report:

   For Non-Rep Employees: HR083 - All Non-Rep Employees Performance Review Data

   For P&A/Staff Association: HR082 - P&A/Staff Association Employees Performance Review Data

   These reports are located: *Public Folders > Human Resources > Standard Certified Reports - Employment Services*



2. Select the following:
   a. **Division** – you may select one or more
   b. **Begin Review Date -**
   c. **End Review Date -** This may be a future date from the date you are running the report. It is recommended you enter a date up to 6 months from the date the report is ran in order to capture any due dates up to 6 months from the day you are running the report. Otherwise, you could miss some records.
   d. **Current Date** – Uncheck the box
   e. **E-class** – you may select one of more
   f. **Review Type** – You may select one or more types OR you may leave it blank, if you do you will receive all reviews (completed and not completed per the review dates specified). See below for a list of Probationary and Provisional review types:

Probationary and Provisional Review Types:
30 - Thirty Day Review
45 - Forty-Five Day Review
60 - Sixty Day Review
6R - Six Month Review
90 – Ninety Day Review

Sample COGNOS Report: Non-Rep Data – 6 Month Review

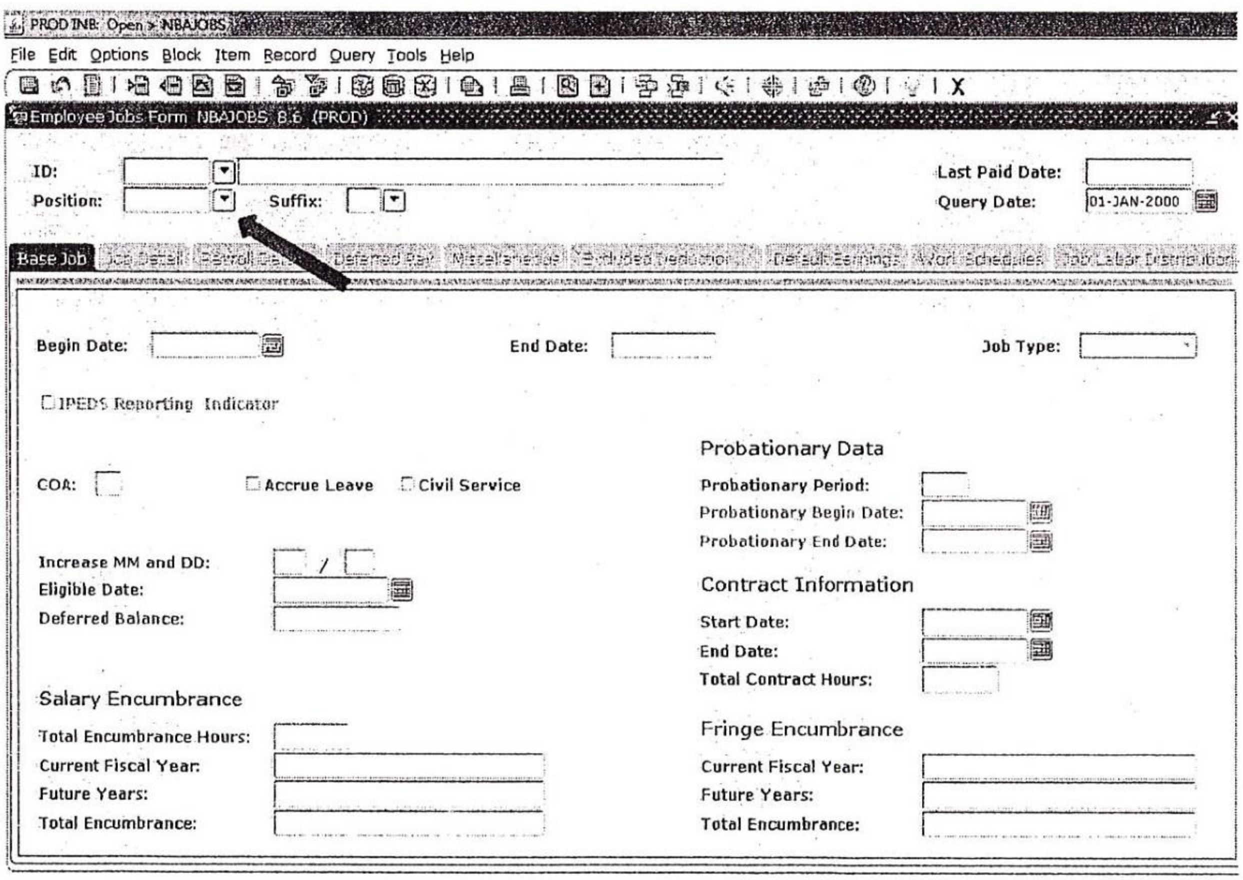
ID	Name	EClass	Current Hire Date	Review Type	Review Due Date	Review Completed Date	Review Rating	Completed
xxxxxxxxx	Last Name, First Name	NN	1/2/14	6R	Jul-1-2014			N

Updating Service Dates in PEAEMPL

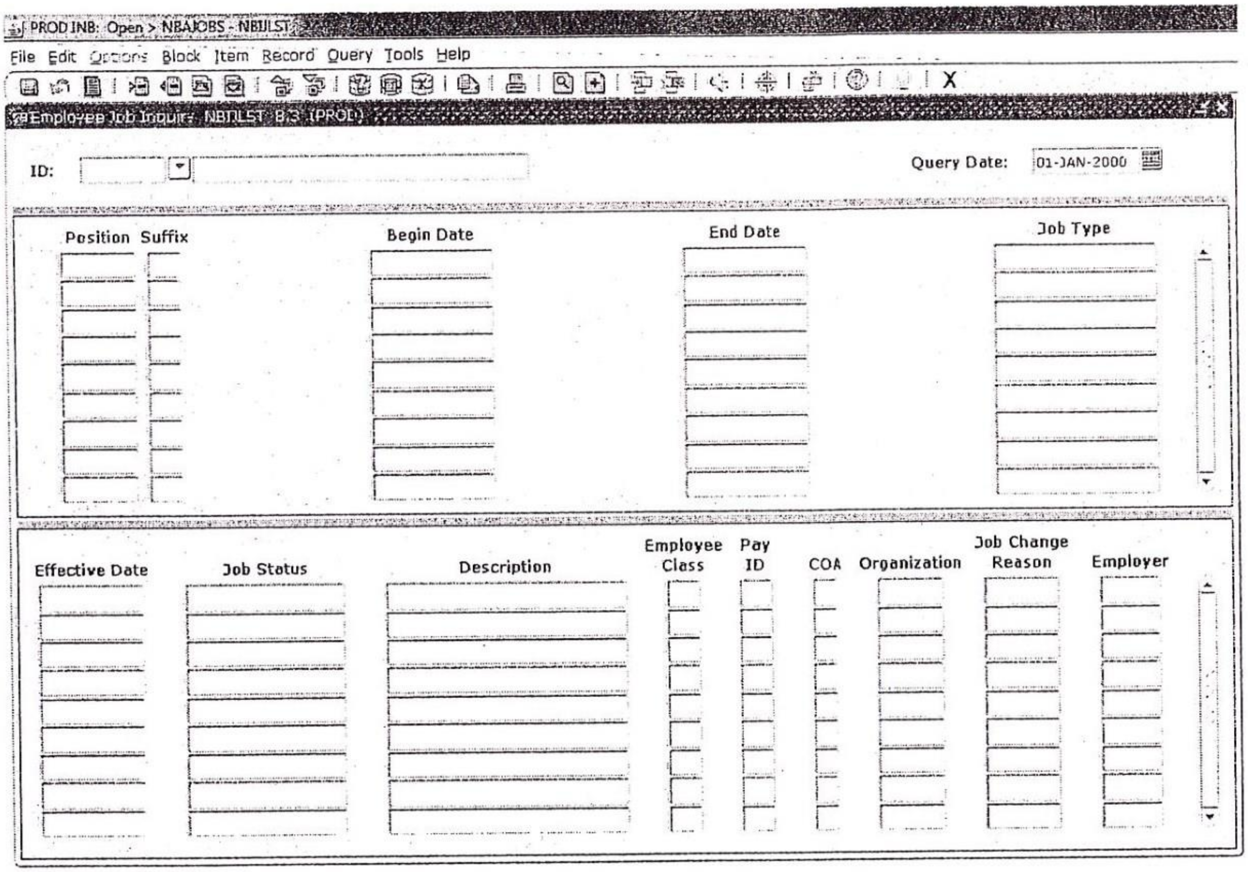
When there is a change in an employee's status (Full or Part-Time), change in title, benefits or first time employee at the University, there are relevant dates that must be changed in Banner. The following work instruction will assist in making the appropriate updates to respective service dates in the PEAEMPL screen.

Changes in the service dates are determined by the type of transaction that has applied for an employee. For instance, an employee that currently has a temporary assignment that started 1/1/2013 and now has been hired for a Full-Time position at the university effective 7/1/2013. The service dates are affected by the employee's new position since there has been a change in the status of the employee. In this case, the dates that will need to be changed are the Current Hire Date as this is a new position, the Adjusted Service Date since the employee will have a position with bank accruals and the Seniority Date as the employee is a new hire.

To view any changes in an employee's work history for promotions/demotions, new hire or rehire, we can view these in NBAJOBS and the NBIJLST screens to determine a change in any service dates. We can access the NBIJLST screen by clicking on the drop down arrow next to the position box in NBAJOBS:



Updating Service Dates in PEAEMPL



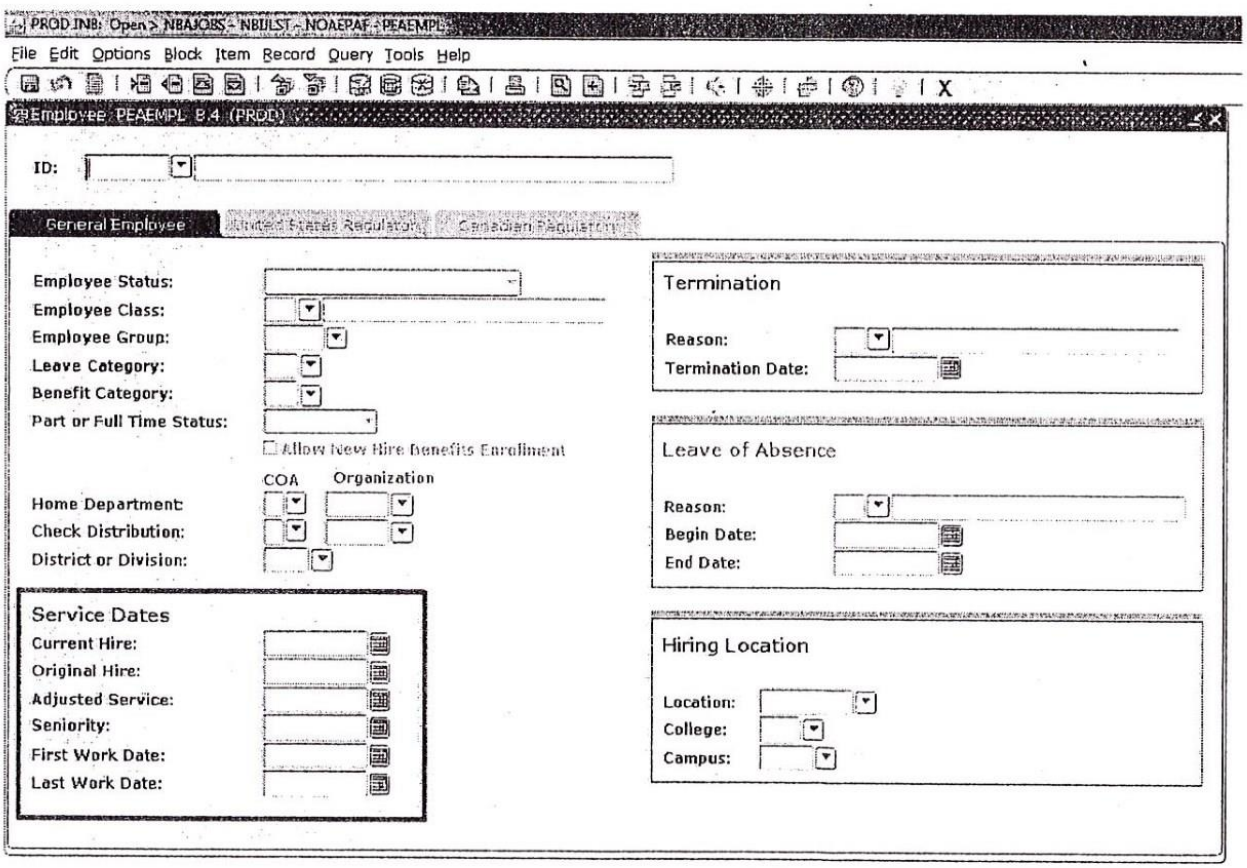
After viewing the most recent assignment, double click on the position number to view the job detail information by pressing the CTRL and Page Down buttons. Pay close attention to the Personnel Date as this determines the start of an assignment, whereas the Effective Date notes the period as to when the job starts.

Once the Personnel Date has been determined, use the following worksheet to determine which dates will be adjusted based on Job Change Reason (JCRE) codes used in a specific transaction.

Updating Service Dates in PEAEMPL

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
CURRENT HIRE DATE							
New Hire	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years	N/A	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A
Break in Service >3 years	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
No Break in Service bet. Benefit Eligible E-Classes	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service bet. Benefit in-eligible E-Classes	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - PTF to benefit Eligible E-Class	No Change	No Change	No Change	No Change	No Change	No Change	No Change
Benefit In-Eligible E-Class to Benefit Eligible E-Class	Current Hire Date = Personnel Date	No Change	No Change	No Change	No Change	No Change	No Change
Benefit In-Eligible or GTA/GRA to PTF (Does not immediately follow a 9-month assignment)	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
ACTIVE Benefit Eligible E-Class with Additional Service Assignment	N/A	N/A	No Change	No Change	No Change	No Change	No Change
Returning from a Layoff?	No Change	No Change	No Change	No Change	No Change	No Change	No Change
ORIGINAL HIRE DATE							
New Hire - First position ever at WSU	Original Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
New Hire - Break in Service > 3 years	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ADJUSTED SERVICE DATE							
New Hire	Adjusted Service Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
No Break in Service - E-Class without Disability Bank to Different E-Class without Disability Bank	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - E-Class with Disability Bank to Different E-Class with Disability Bank	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - E-Class with Disability Bank to E-Class without Disability Bank	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	No Change	No Change	Adjusted Service Date = Personnel Date
No Break in Service - E-Class without a Disability Bank to E-Class with Disability	Adjusted Service Date = Personnel	Adjusted Service Date = Personnel	Adjusted Service Date = Personnel	Adjusted Service Date = Personnel	No Change	No Change	Adjusted Service Date = Personnel

After determining which service date will change, we will navigate to the PEAEMPL screen to work in the Service Dates area noted below:



Prior to making any adjustments to any of these dates, please review the service date types below:

Updating Service Dates in PEAEMPL

Current Hire Date: This field is the date of the employee's most recent hire at WSU. If the information in the Current Value column is missing or should be changed, enter the new date as MMDDYY or as DD-MMM-YYYY under the New Value column. The date entered in this field is determined as follows:

1. If this is the employee's first position ever at the University, this date should be the date employee begins employment.

2. If the employee had a position that is terminated and receives a Part-Time Faculty assignment that does not immediately follow a 9 Month assignment, this date should be the date of the employee's Part-Time Faculty assignment.

3. If the employee has a break in service of a year or more between Part-Time Faculty assignments, this date should be the date of the employee's rehire as Part-Time Faculty.

4. This date <u>is not</u> changed if the employee has an active assignment in a classification that is eligible to receive Benefits and is taking an additional assignment in a classification this is not eligible to receive Benefits.

Original Hire Date: This field is for the date of the person's <u>very first</u> position at WSU <u>**as**</u> an employee in any classification, except Voluntary Faculty.

Adjusted Serv. Date: This field is used to calculate bank accruals. NOTE: This field is not used for Part-Time Faculty and only needs to be completed if this is the employee's first assignment at the University, entered as MMDDYY or DD-MMM-YYYY. It changes when an employee that has an E-Class without a disability bank to a different E-Class that with a disability bank.

Seniority Date: This field is for the employee's class seniority date. NOTE: This field is not used for Part-Time Faculty and only needs to be completed if this is the employee's first assignment at the University entered as MMDDYY or DD-MMM-YYYY. This date changes when there is a change in title, new E-Class, and breaks in service less than 3 years for all E-Classes.

First Work Date: This field is used to calculate years of service. NOTE: This field is not used for Part-Time Faculty and only needs to be completed if this is the employee's first assignment at the University entered as MMDDYY or DD-MMM-YYYY.

Please remember to save any changes after entering the specific service date.

PEAEMPL Date Rules

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
CURRENT HIRE DATE							
New Hire	**Current Hire Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years	N/A	**Current Hire Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A
Break in Service >3 years	**Current Hire Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A	N/A
No Break in Service bet. Benefit Eligible E-Classes	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service bet. Benefit In-eligible E-Classes	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - PTF to Benefit Eligible E-Class	No Change	No Change	No Change	No Change	No Change	No Change	No Change
Benefit In-Eligible E-Class to Benefit Eligible E-Class	**Current Hire Date = Personnel Date**	No Change	No Change	No Change	No Change	No Change	No Change
Benefit In-Eligible or GTA/GRA to PTF (does not immediately follow a 9-month assignment)	**Current Hire Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A	N/A
ACTIVE Benefit Eligible E-Class with Additional Service Assignment	N/A	N/A	No Change	No Change	No Change	No Change	No Change
ORIGINAL HIRE DATE							
New Hire	**Original Hire Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A	N/A
ADJUSTED SERVICE DATE							
New Hire	**Adjusted Service Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A	N/A
No Break in Service - E-Class without Disability Bank to Different E-Class without Disability Bank	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - E-Class with Disability Bank to Different E-Class with Disability Bank	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - E-Class with Disability Bank to E-Class without Disability Bank	**Adjusted Service Date = Personnel Date**	**Adjusted Service Date = Personnel Date**	**Adjusted Service Date = Personnel Date**	**Adjusted Service Date = Personnel Date**	No Change	No Change	**Adjusted Service Date = Personnel Date**

Revised: 7/17/2013

PEAEMPL Date Rules

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
No Break in Service - E-Class without a Disability Bank to E-Class with Disability Bank	Adjusted Service Date = Personnel Date	**Adjusted Service Date = Personnel Date**	**Adjusted Service Date = Personnel Date**	**Adjusted Service Date = Personnel Date**	No Change	No Change	**Adjusted Service Date = Personnel Date**
Break in Service < 3 years - Previously in E-Class without Disability Bank to Different E-Class without Disability Bank	No Change	No Change	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - Previously in E-Class with Disability Bank to Different E-Class with Disability Bank	No Change	No Change	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - Previously in E-Class with Disability Bank coming back to E-Class without Disability Bank	**Adjusted Service Date** = Personnel Date	**Adjusted Service Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - Previously in E-Class without Disability Bank coming back to E-Class with Disability Bank	**Adjusted Service Date** = Personnel Date	**Adjusted Service Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A
E-Classes with Disability Banks: A2,A9,C2,C9,D2,D9,EX,F2,F9,MA,NE,NN,PA,PE,PN, R2,R9,S2,S9, TR							
SENIORITY DATE							
New Hire (All E-Classes)	Seniority Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years (All E-Classes)	Seniority Date = Personnel Date	**Seniority Date = Personnel Date**	N/A	N/A	N/A	N/A	N/A
Same Non-Academic E-Class; different class title	N/A	N/A	**Seniority Date = Personnel Date**	**Seniority Date = Personnel Date**	**Seniority Date = Personnel Date**	**Seniority Date = Personnel Date**	**Seniority Date = Personnel Date**
Same Non-Academic E-Class; same class title	N/A	N/A	No Change	No change	No Change	No Change	No change
Different E-Class (if one is Non-Academic)	Seniority Date = Personnel Date	**Seniority Date = Personnel Date**	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date
Non-Academic E-Classes: 24,7M,AS,HC,HE,HU,MA,NC,NE,NN,OE,OS, PE,PN,PS,SA,SK							

PEAEMPL Date Rules

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
FIRST WORK DAY							
New Hire	First Work Day = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service >3 years	First Work Day = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service Resulting from Layoff	N/A	First Work Day = First Work Day + Length of time on Layoff	N/A	N/A	N/A	N/A	N/A
Current TE position in same home department for <1 year to Benefit-Eligible E-Class	No Change	No Change	N/A	N/A	N/A	N/A	N/A
Current TE position in same home department >1 year to Benefit-Eligible E-Class	First Work Day = First Work Day + 1 year	First Work Day = First Work Day + 1 year	N/A	N/A	N/A	N/A	N/A
TE that is not in the same home department, or any other Temporary Non-Benefit position, including Stipends, to a Benefit Eligible E-class	First Work Day = Personnel Date	First Work Day = Personnel Date	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - EE returning to full-time position	First Work Day = Length of time from separation + First Work Day	First Work Day = Length of time from separation + First Work Day	N/A	N/A	N/A	N/A	N/A
PTF, ST, CW, GTA/GRA, MR	No Change						

PEAEMPL Date Rules

Reclass

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
CURRENT HIRE DATE							
New Hire	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years	N/A	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A
Break in Service >3 years	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
No Break in Service bet. Benefit Eligible E-Classes	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service bet. Benefit In-eligible E-Classes	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - PTF to Benefit Eligible E-Class	No Change	No Change	No Change	No Change	No Change	No Change	No Change
Benefit In-Eligible E-Class to Benefit Eligible E-Class	Current Hire Date = Personnel Date	No Change	No Change	No Change	No Change	No Change	No Change
Benefit In-Eligible or GTA/GRA to PTF (does not immediately follow a 9-month assignment)	Current Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
ACTIVE Benefit Eligible E-Class with Additional Service Assignment	N/A	N/A	No Change	No Change	No Change	No Change	No Change
ORIGINAL HIRE DATE							
New Hire	Original Hire Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
ADJUSTED SERVICE DATE							
New Hire	Adjusted Service Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
No Break in Service - E-Class without Disability Bank to Different E-Class without Disability Bank	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - E-Class with Disability Bank to Different E-Class with Disability Bank	No Change	No Change	No Change	No Change	No Change	No Change	No Change
No Break in Service - E-Class with Disability Bank to E-Class without Disability Bank	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	No Change	No Change	Adjusted Service Date = Personnel Date

PEAEMPL Date Rules

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
No Break in Service - E-Class without a Disability Bank to E-Class with Disability Bank	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	No Change	No Change	Adjusted Service Date = Personnel Date
Break in Service < 3 years - Previously in E-Class without Disability Bank to Different E-Class without Disability Bank	No Change	No Change	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - Previously in E-Class with Disability Bank to Different E-Class with Disability Bank	No Change	No Change	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - Previously in E-Class with Disability Bank coming back to E-Class without Disability Bank	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - Previously in E-Class without Disability Bank coming back to E-Class with Disability Bank	Adjusted Service Date = Personnel Date	Adjusted Service Date = Personnel Date	N/A	N/A	N/A	N/A	N/A
E-Classes with Disability Banks: A2,A9,C2,C9,D2,D9,EX,F2,F9,MA,NE,NN,PA,PE,PN, R2,R9,S2,S9, TR							
SENIORITY DATE							
New Hire (All E-Classes)	Seniority Date = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years (All E-Classes)	Seniority Date = Personnel Date	Seniority Date = Personnel Date	N/A	N/A	N/A	N/A	N/A
Same Non-Academic E-Class; different class title	N/A	N/A	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date
Same Non-Academic E-Class; same class title	N/A	N/A	No Change	No change	No Change	No Change	No change
Different E-Class (If one is Non-Academic)	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date	Seniority Date = Personnel Date
Non-Academic E-Classes: 24,7M,AS,HC,HE,HU,MA,NC,NE,NN,OE,OS, PE,PN,PS,SA,SK							

PEAEMPL Date Rules

	HIAPP	HIREA	CJPRO	CJDOW	TRANS	RCLAS	RTTEM
FIRST WORK DAY							
New Hire	First Work Day = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service >3 years	First Work Day = Personnel Date	N/A	N/A	N/A	N/A	N/A	N/A
Break in Service Resulting from Layoff	N/A	First Work Day = First Work Day + Length of time on Layoff	N/A	N/A	N/A	N/A	N/A
Current TE position in same home department for <1 year to Benefit-Eligible E-Class	No Change	No Change	N/A	N/A	N/A	N/A	N/A
Current TE position in same home department >1 year to Benefit-Eligible E-Class	First Work Day = First Work Day + 1 year	First Work Day = First Work Day + 1 year	N/A	N/A	N/A	N/A	N/A
TE that is not in the same home department, or any other Temporary Non-Benefit position, including Stipends, to a Benefit Eligible E-class	First Work Day = Personnel Date	First Work Day = Personnel Date	N/A	N/A	N/A	N/A	N/A
Break in Service < 3 years - EE returning to full-time position	First Work Day = Length of time from separation + First Work Day	First Work Day = Length of time from separation + First Work Day	N/A	N/A	N/A	N/A	N/A
PTF, ST, CW, GTA/GRA, MR	No Change						

Entering Faculty Data in PEAFACT

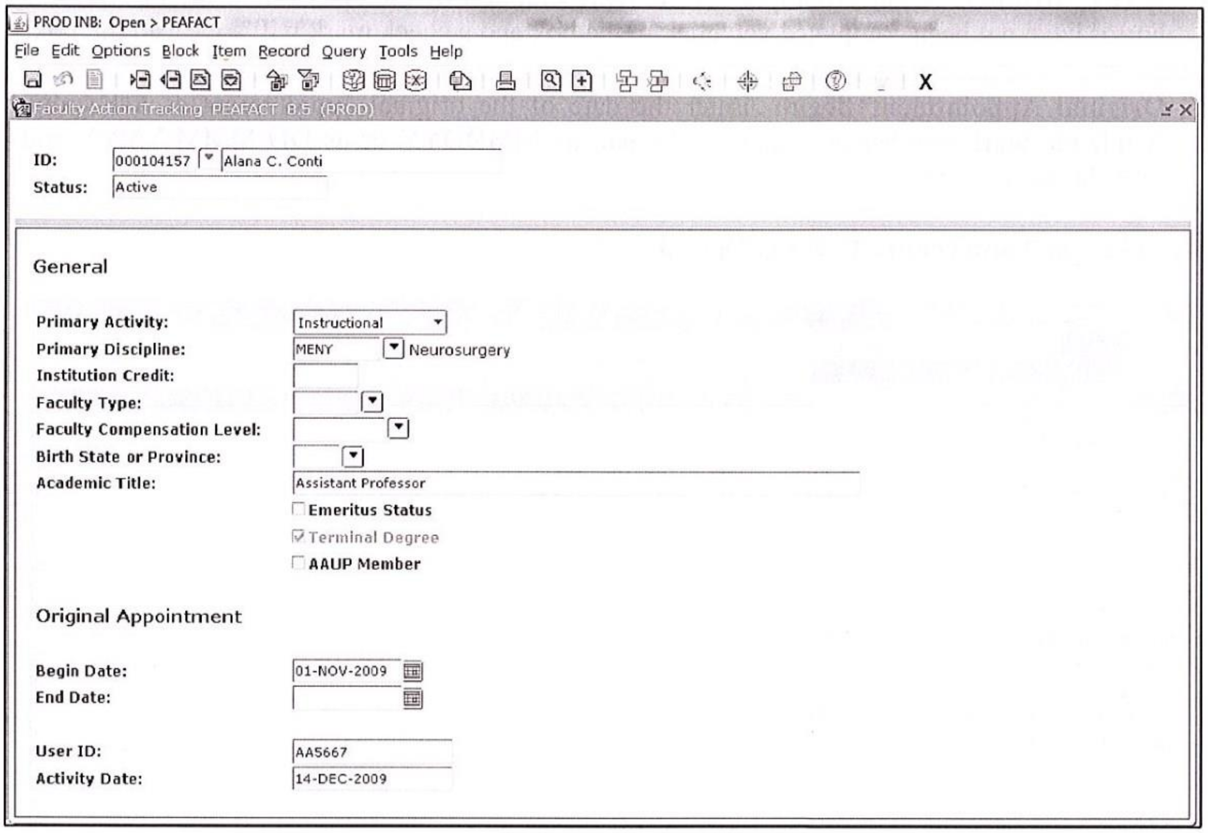
Complete this section for all Department Chairs, Faculty, and Academic Staff. Information should not be entered on this Form until the assignment has applied in NBAJOBS screen in Banner Form is completed. The primary documents to use for entries in PEAFACT are the Appointment Summary and Letter of Offer from the respective unit.

Go to PEAFACT screen in Banner:

Enter the employee's Banner ID or Access ID.

Status: Will default in. Do not change.

Click on the first field the system will allow your cursor to rest or hit the CTRL and+ Page Down keys at the same time.



- **Primary Activity:** Click on the arrow and select the correct option. The options used are:

  A. **Administrative:** For E-Classes C2, C9, D2, D9, S2, S9 and any Administrators who have Faculty Rank.

  B. **Research:** For Academic classifications that are specifically entitled Research.

  C. **Instructional:** For all other classifications.

- **Primary Discipline:** Enter the correct Discipline code. If you do not know the code, hit the F9 key or double click in the first space in the field. A pop-up window will appear. Scroll down to the correct Discipline, highlight and use the enter key to populate information in field. When you enter a defined code, the Discipline name will default in.

- **Academic Title**: Will default from the NBAJOBS Form. If the title did not default in, type the title exactly as found on the NBAJOBS Form.

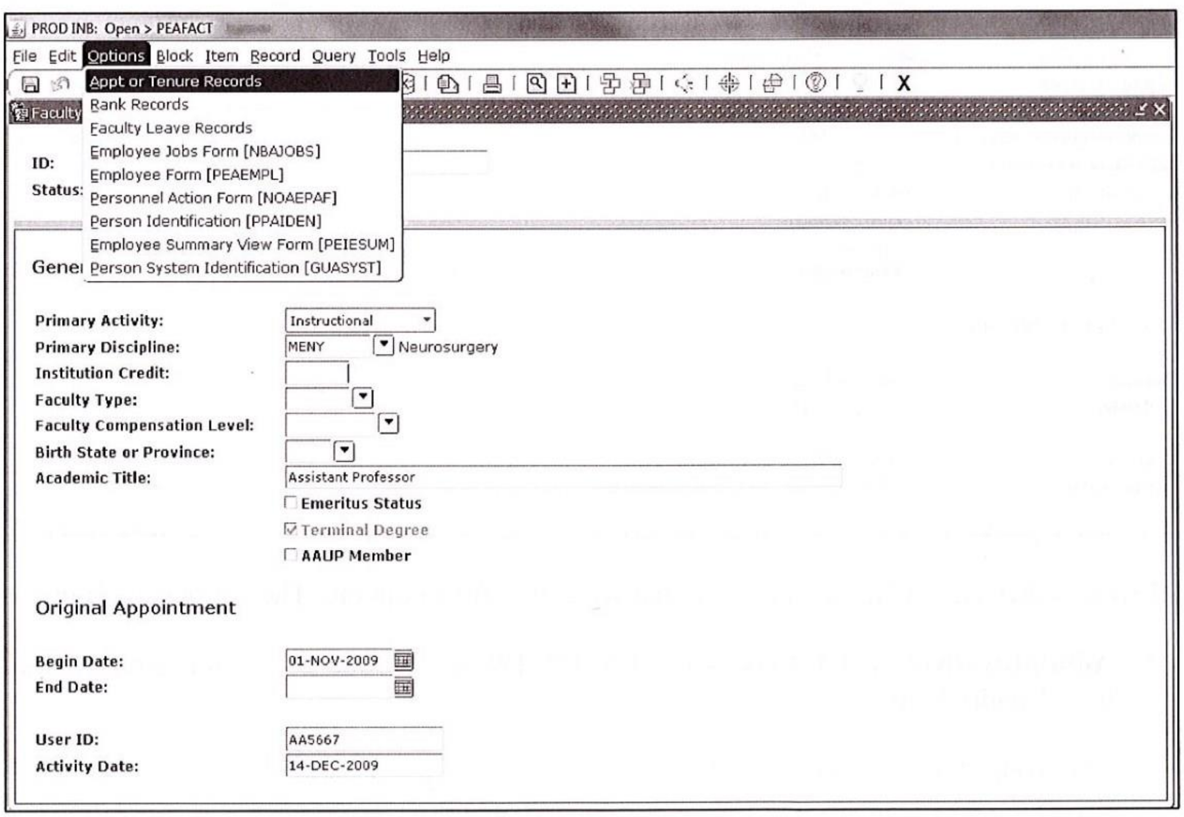
- **Emeritus Status:** This is not used for new/original appointments. This field will only be completed if an employee retires and the Provost's Office official approves an Emeritus appointment for the employee.

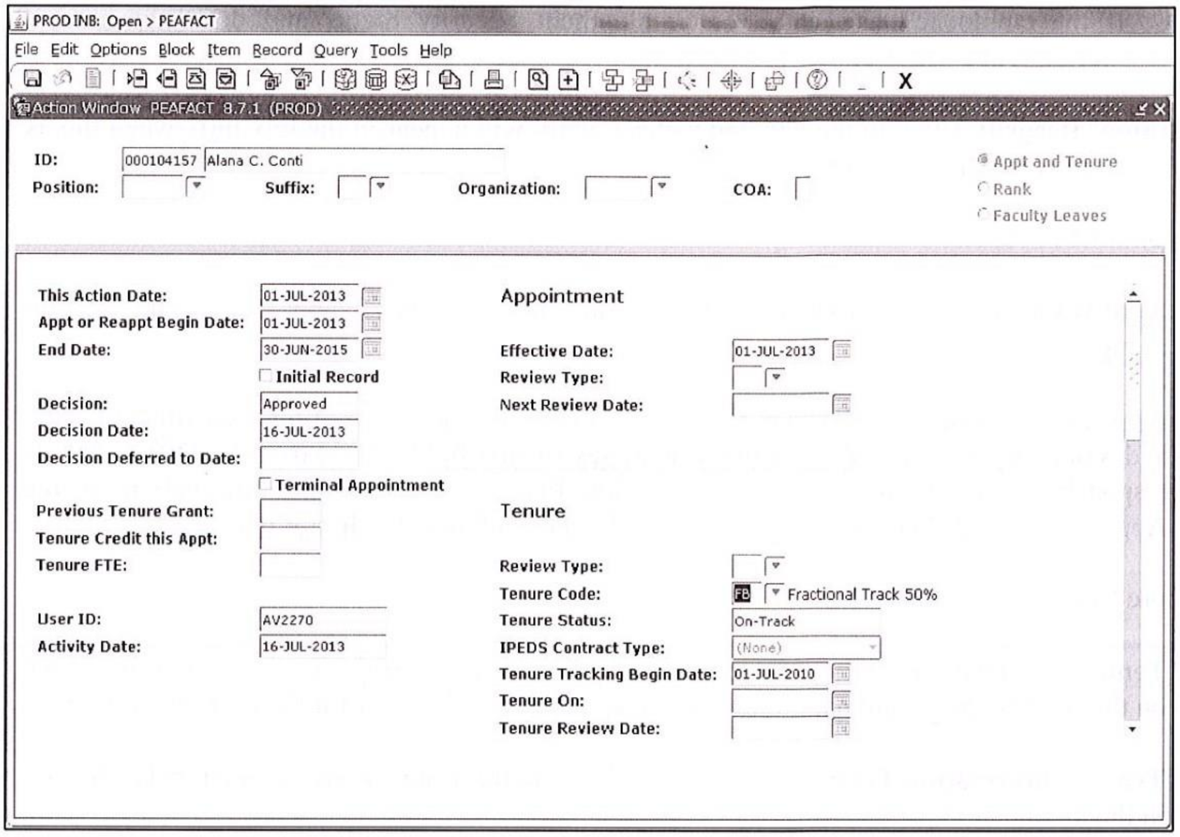
- **Terminal Degree:** This will default from the PPAGENL form. If you checked the Terminal Degree box on the PPAGENL Form, a check mark will appear in the box.

- **AAUP Member:** If the employee selects representation by the AAUP and the PDADEDN Forms have not been completed yet, click in the box and a check mark will appear in the box.

- **Original Appointment Begin:** Enter the date of the original appointment as a Faculty, Academic Staff member or Department Chair as MMDDYY or as DD-MMM-YYYY and save the assignment.

Next click on **Appt/Tenure Records Option**:





The sections that will be utilized in this area will be the **This Action Date** and **Appointment** sections. The **Tenure** section entries are completed by the Provost's office for Academic Tenure. However, Employment Security Status entries are completed by the unit.

- **This Action Date**: The current date will default in. Change to the date of the original appointment as a Faculty, Academic Staff member or Department Chair entered as MMDDYY or as DD-MMM-YYYY. **NOTE:** It is not possible to have multiple appointments with the same date. If there is already an assignment with the same date, enter the date one day later as MMDDYY or as DD-MMM-YYYY.

- **Appt/Reappt Begin Date**: Enter the date of the original appointment as a Faculty, Academic Staff member or Department Chair as MMDDYY or as DD-MMM-YYYY. A box may appear with the message: *ERROR* Appointment Begin Date must be Entered . If it does, click OK and enter the true date the appointment as Faculty, Academic Staff member or Department Chair is effective as MMDDYY or as DD-MMM-YYYY. **NOTE:** It is possible to have multiple appointments at the same time.

- **Appt/Reappt End Date:** This is the date the employee's contract ends and is entered as MMDDYY or as DD-MMM-YYYY and is determined as follows:

  A. If the employee is a Faculty or Academic staff member on a contract.

  B. If the employee is assigned as Department Chair this is the date listed in the letter of offer that the assignment will be reviewed for renewal, even if the employee holds Tenure or Employment Security Status in another position at the University.

C. If the employee has Tenure or Employment Security Status and does not have a Department Chair assignment, this field should be left blank.

- **Initial Record:** Click in the box and a check mark will appear in the box **only** when this is the employee's first appointment.

Appointment Section:

- **Appt Information Effective Date:** Will default from the Appt/Reappt Begin Date. Do not change.

- **Appt Information Next Review Date:** This field will only be used for Department Chairs and Voluntary Faculty. **Do not make changes to this field**. The Provost's Office staff is responsible for entering information in this field, duplicating the information in the Appt/Reappt End Date field. If information defaults in this field, **do not delete**.

Tenure Information Section:

- **Tenure Information Tenure Code:** Enter the Tenure code. If the Tenure code is not listed on the Appointment Summary, return to the approver or originator for the correct code.

- **Tenure Information Tenure Status:** Defaults from the Tenure code. Cannot make changes in this field.

- **IPEDS Contract Type:** This is a required field if the Tenure Code has a status of "Ineligible" or "Non-Tenured". Additional codes that this affects are:

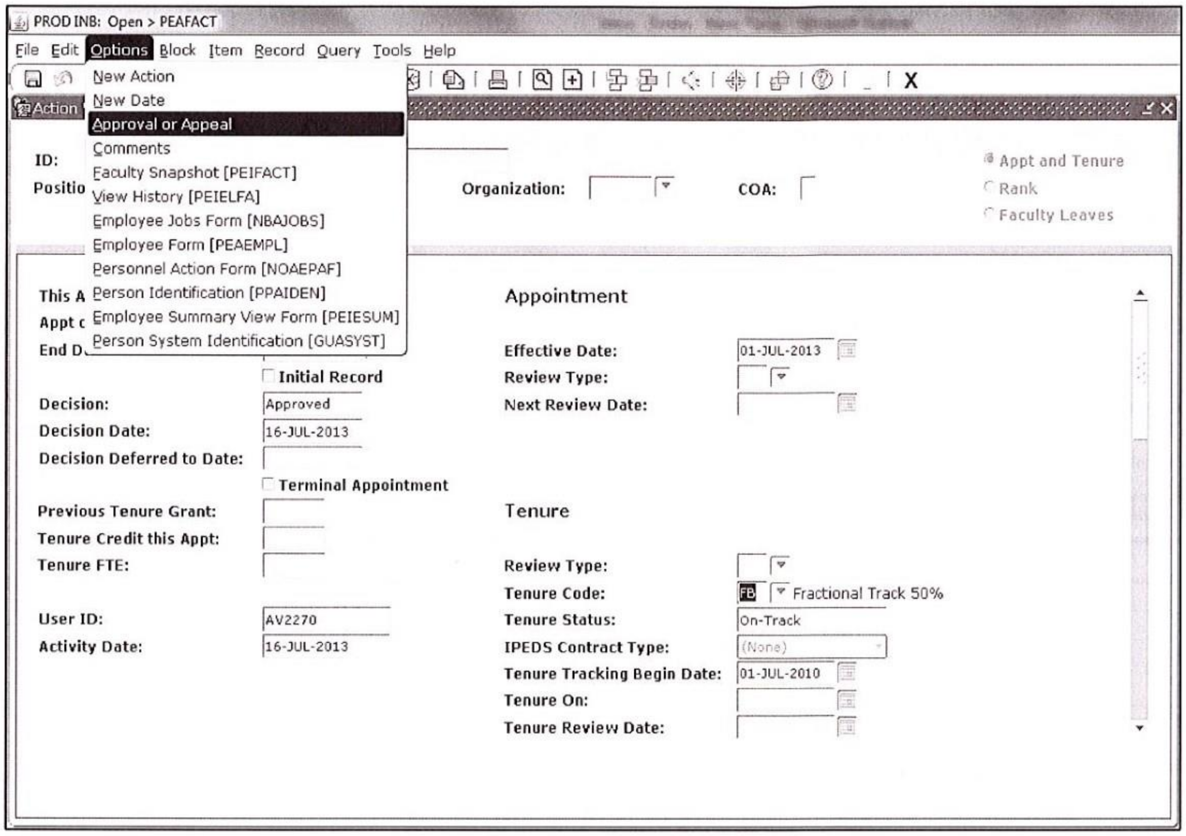
  ES - Employ Security Status
  ET - Employ Security System
  IN - Ineligible
  NT - Non-Tenured
  PR - Preliminary
  RC - Renewal Contract
  VN - Visiting Faculty w/o Tenure
  VT - Visiting Faculty w/Tenure

  When entering data on PEAFACT for any of the above listed Tenure codes, the "Annual" option must be selected in the IPEDS Contract Type field. The system will not allow you to enter or update anything in the "Appt or Tenure Records" option if this is not done.

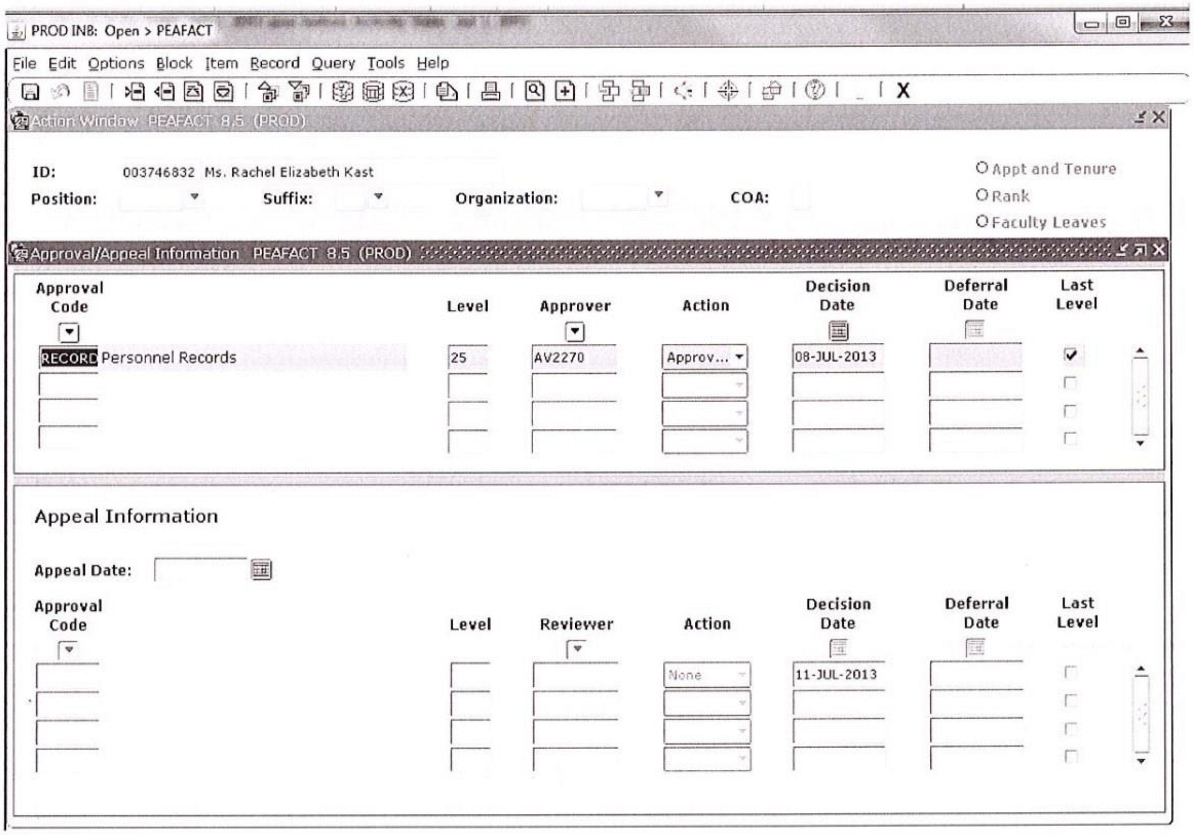
- **Tenure Information Tracking Begin:** If the employee's appointment is a Tenure Track Appointment (Tenure Information Tenure Code OT), enter the date of the original appointment as a Faculty, Academic Staff member or Department Chair as MMDDYY or as DD-MMM-YYYY. If the employee's appointment is not a Tenure Track Appointment, leave blank. For Employment Security Status, this section is not completed.

- **Tenure Information Tenure On:** If the employee is appointed with Tenure, enter the original appointment date as MMDDYY or as DD-MMM-YYYY. If the employee is not appointed with Tenure, leave blank. For Employment Security Status, this section is not completed.

To approve the appointment, click on **Approval/Appeal Option** from the Options drop down:



This takes you to the Approval/Appeal screen:

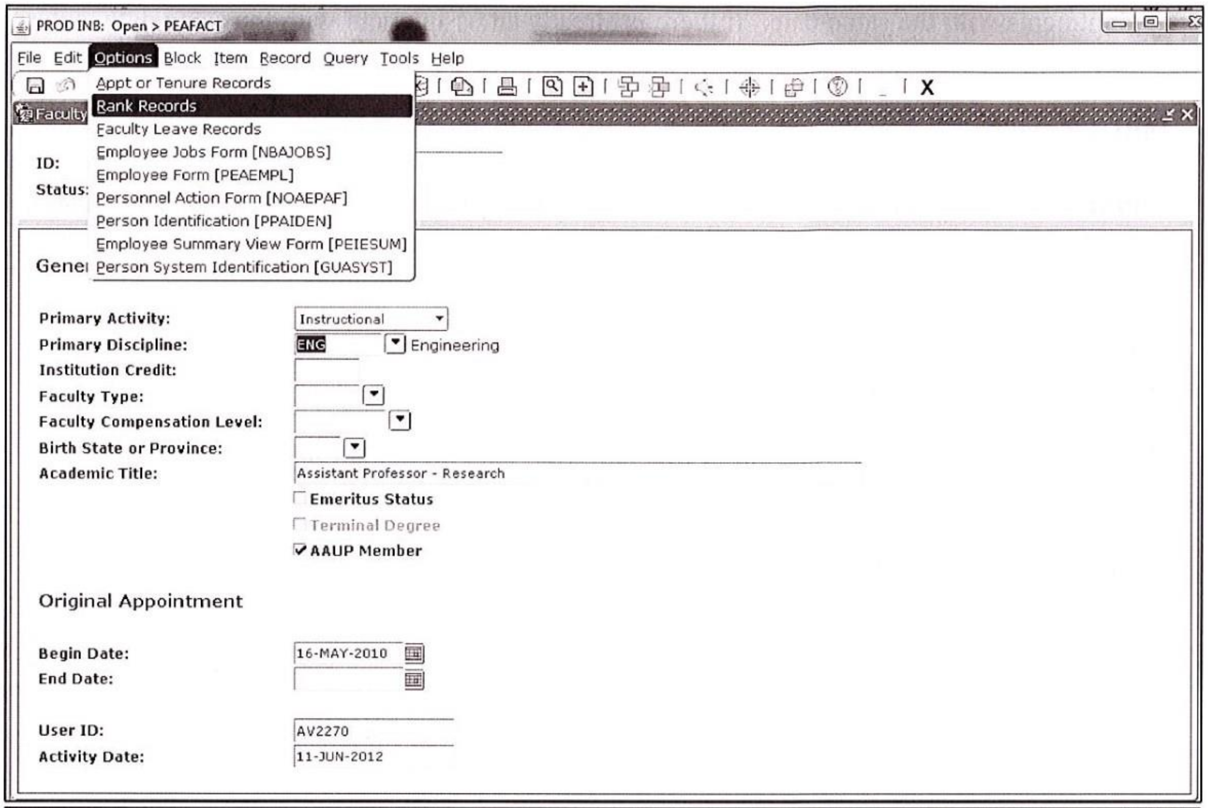


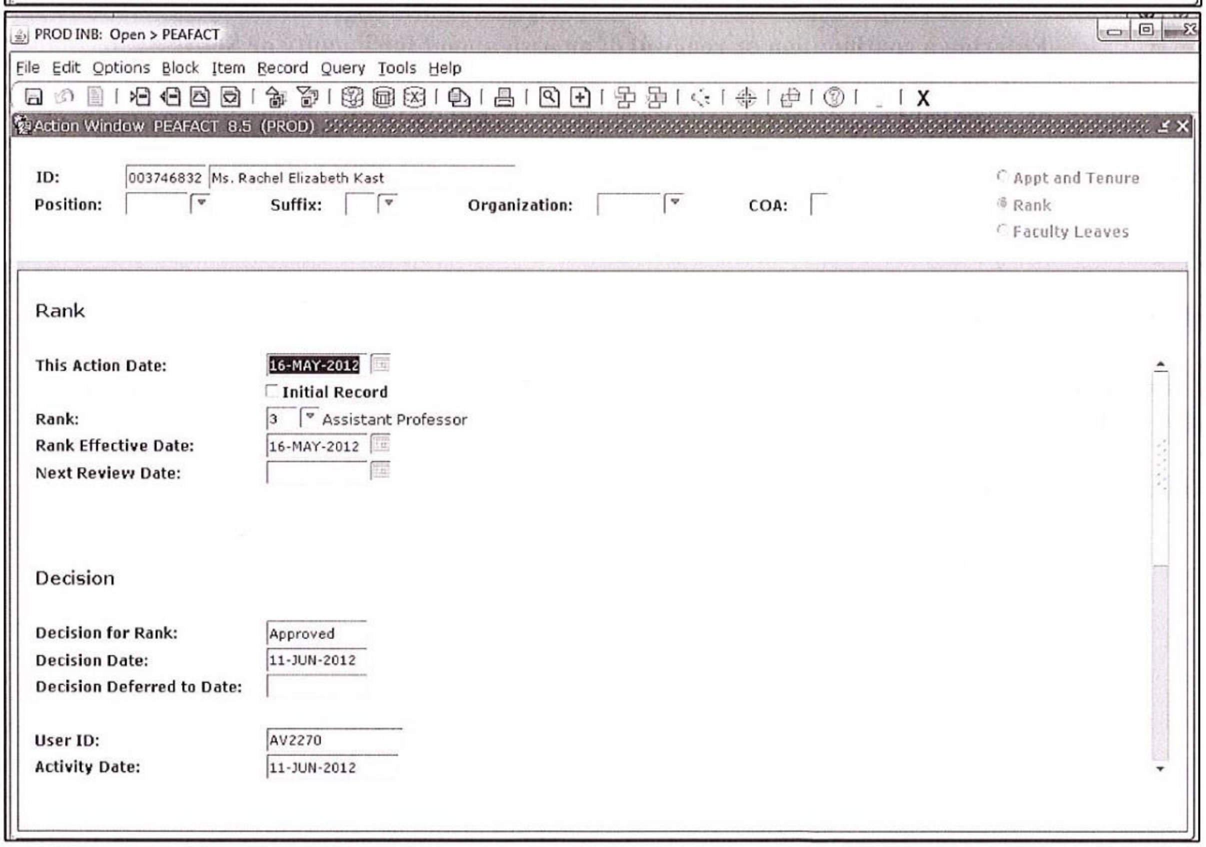
- **Approval Code:** Type in RECORD.
- **Level:** Will default from Code. Changes cannot be made in this field.
- **Approver:** Enter **your** Access ID. If this is the first time in a session that you are entering information on this field, you may get an error message that your Access ID is invalid. If this happens, while in the field hit the F9 key or select Help from the pull down menu on the top horizontal tool bar and click on "List". A list of the Access ID's for employees who can make changes to this field will appear. Scroll down until your Access ID is highlighted and click OK.
- **Action:** Click on the arrow and select the Approved option.
- **Date:** Current date will default in. Do not change.
- **Last Level:** Click in the box and a check mark will appear and save the record.

Next the employee rank will need to be completed. Click on the rollback button to return to the PEAFACT Form General Information screen by hitting the CTRL and F7 keys at the same time or clicking on the curved arrow on the horizontal tool bar above the screen:

Click on the first field the system will allow your cursor to rest or hit the CTRL & Page Down keys at the same time.

Click on **Rank Records** under Options:





- **This Action Date**: The current date will default in. Change to the date of the original appointment as a Faculty, Academic Staff member or Department Chair entered as MMDDYY or as DD-MMM-YYYY. **NOTE:** It is not possible to have multiple appointments with the same date. If there is already an assignment with the same date, enter the date one day later as MMDDYY or as DD-MMM-YYYY.

- **Initial Record:** Click in the box and a check mark will appear in the box.
- **Rank:** Enter the Rank code. When you enter a defined code, the Rank name will default in. If the Rank code is not listed on the Appointment Summary, return to the approver or originator for the correct code.
- **Rank Effective Date**: The current date will default in. Change to the date of the original appointment as a Faculty member entered as MMDDYY or as DD-MMM-YYYY.
- **Decision Information Decision for Rank**: Information will default in later from the Approval/Appeal data.
- **Decision Information Decision Date**: Date will default in later from the Approval/Appeal data.

Repeat the **Approval/Appeal Option** for the Ranking Record and save the record.

Entering a continuation or renewal of an assignment for Faculty or Staff

Please follow the steps below to complete a continuation or renewal for Faculty or Staff assignments.

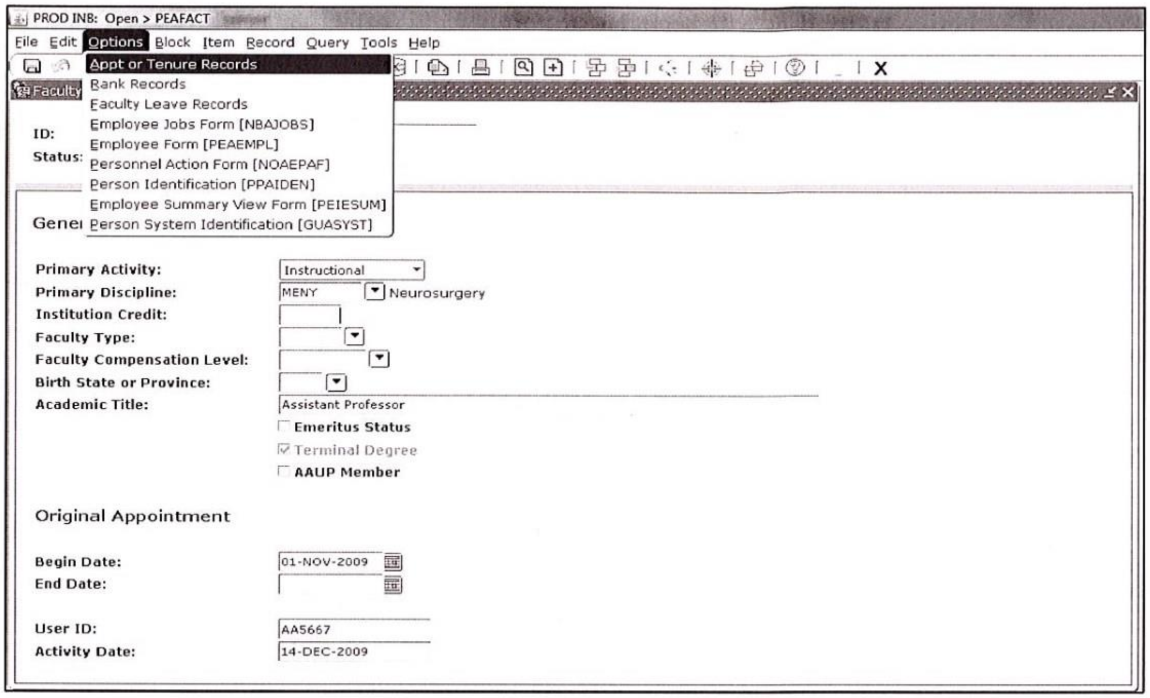
Go to PEAFACT screen in Banner:

Enter the employee's Banner ID or Access ID.

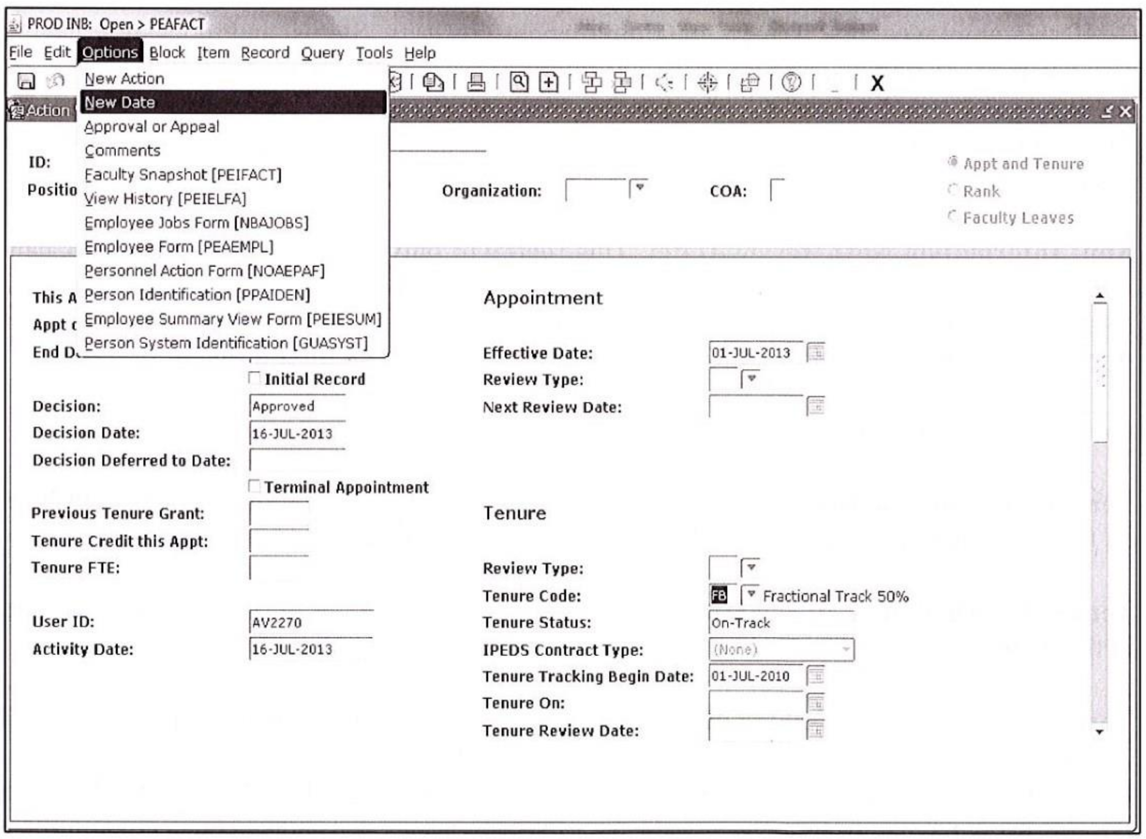
Status: Will default in. Do not change.

Click on the first field the system will allow your cursor to rest or hit the CTRL and+ Page Down keys at the same time.

Click on **Appt/Tenure Records** from the Options drop down:



To begin entering the new assignment dates, click on the "New Date" option:



- **New Action Date:** Enter the true date the Renewal is effective as MMDDYY or as DD-MMM-YYYY.

- **Proposed Effective Date:** Enter the true date the Renewal is effective as MMDDYY or as DD-MMM-YYYY.

- Click OK or hit the Enter key twice.

- **This Action Date:** Will default from the New Action Date. Do not change.

- **Appt/Reappt Begin Date:** Enter the date of the Renewal or Continuation as a Faculty, Academic Staff member or Department Chair as MMDDYY or as DD-MMM-YYYY. A box may appear with the message: *ERROR* Appointment Begin Date must be Entered OK. If it does, click OK and enter the true date the Renewal or Continuation as a Faculty, Academic Staff member or Department Chair is effective as MMDDYY or as DD-MMM-YYYY. NOTE: It is possible to have multiple appointments at the same time.

- **Appt/Reappt End Date:** This is the date the employee's contract ends and is entered as MMDDYY or as DD-MMM-YYYY and is determined as follows:
  A. If the employee is a Faculty or Academic staff member on a contract.

  B. If the employee is assigned as Department Chair this is the date listed in the letter of offer that the assignment will be reviewed for renewal, even if the employee holds Tenure or Employment Security Status in another position at the University.

  C. If the employee has Tenure or Employment Security Status and does not have a Department Chair assignment, this field should be left blank.

- **Appt Information Effective Date:** Will default from the Proposed Effective Date. Do not change.

- **Appt Information Next Review Date:** This field will only be used for Department Chairs and Voluntary Faculty. **Do not make changes to this field**. The Provost's Office staff is responsible for entering information in this field, duplicating the information in the Appt/Reappt End Date field. If information defaults in this field, **do not delete**.

Tenure Information Section:

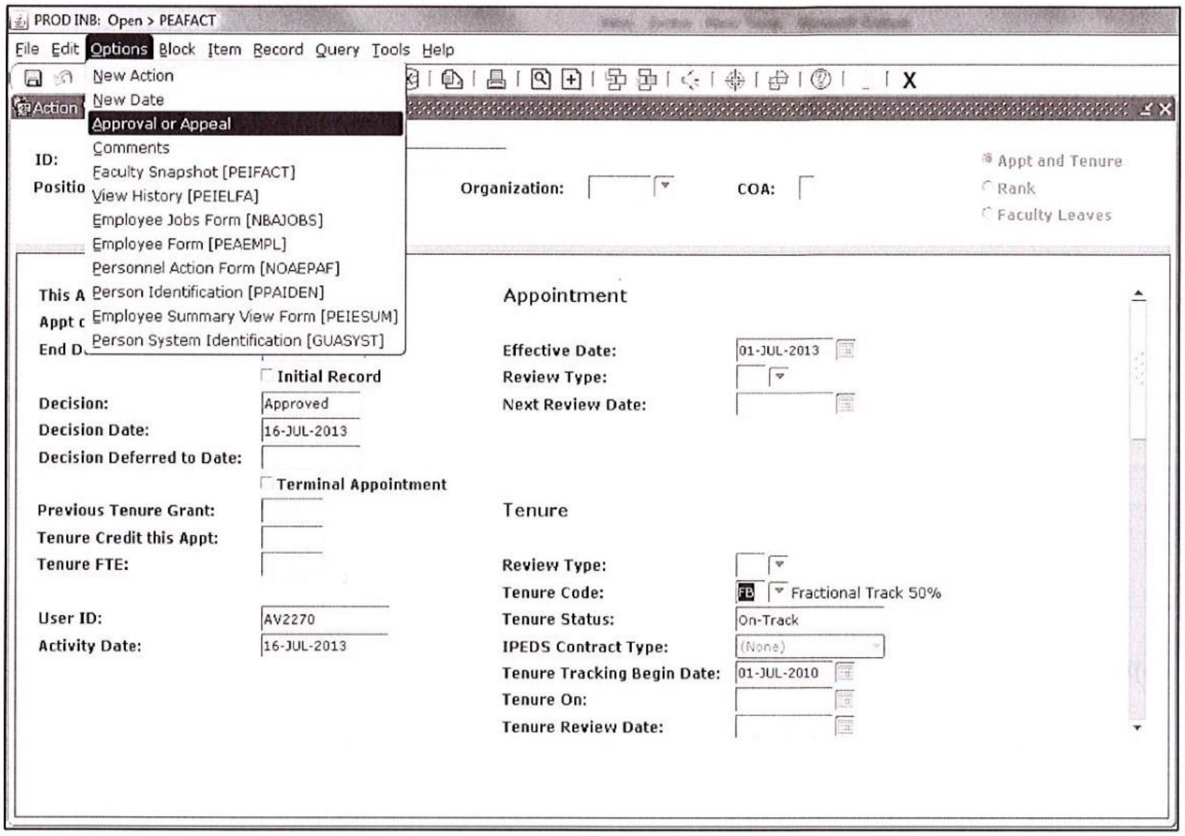
- **Tenure Information Tenure Code:** Enter the Tenure code. If the Tenure code is not listed on the Appointment Summary, return to the approver or originator for the correct code.

- **Tenure Information Tenure Status:** Defaults from the Tenure code. Cannot make changes in this field.

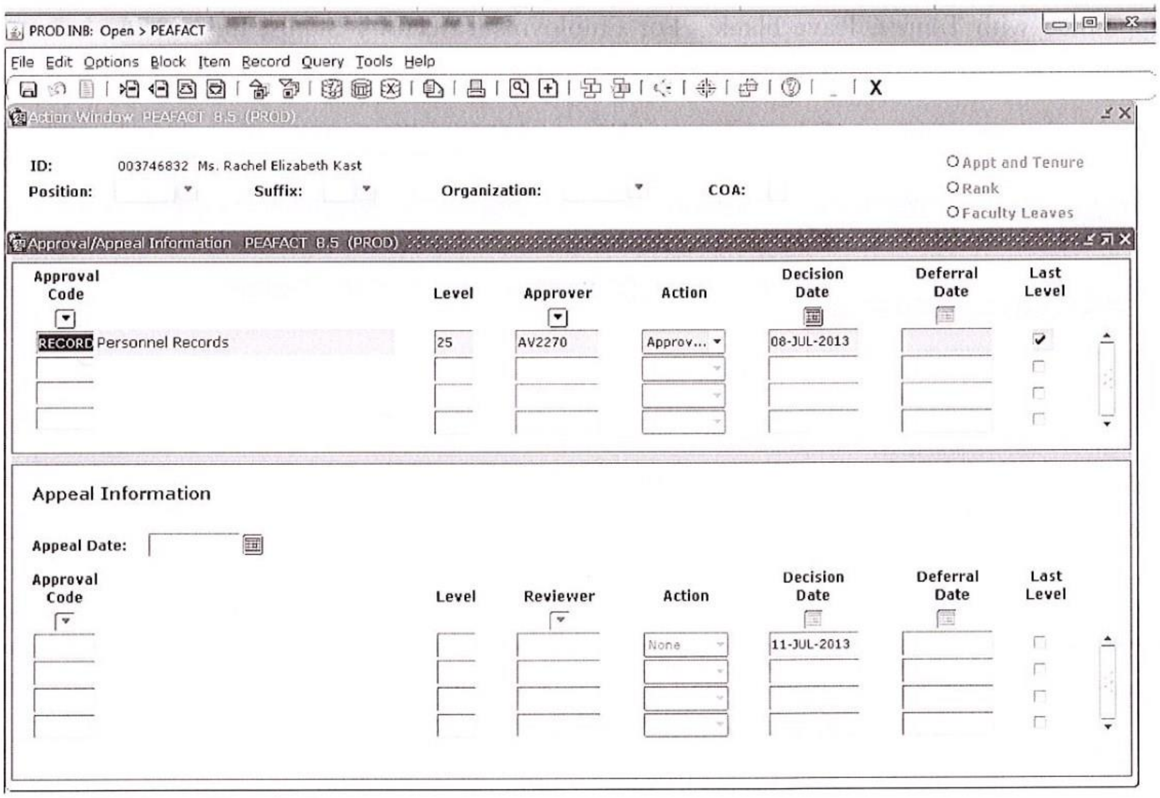
- **Tenure Information Tracking Begin:** If the employee's appointment is a Tenure Track Appointment (Tenure Information Tenure Code OT), enter the date of the original appointment as a Faculty, Academic Staff member or Department Chair as MMDDYY or as DD-MMM-YYYY. If the employee's appointment is not a Tenure Track Appointment, leave blank. For Employment Security Status, this section is not completed.

- **Tenure Information Tenure On:** If the employee is appointed with Tenure, enter the original appointment date as MMDDYY or as DD-MMM-YYYY. If the employee is not appointed with Tenure, leave blank. For Employment Security Status, this section is not completed.

To approve the appointment, click on **Approval/Appeal Option** from the Options drop down:



This takes you to the Approval/Appeal screen:



- **Approval Code:** Type in RECORD.

- **Level:** Will default from Code. Changes cannot be made in this field.

- **Approver:** Enter **your** Access ID. If this is the first time in a session that you are entering information on this field, you may get an error message that your Access ID is invalid. If this happens, while in the field hit the F9 key or select Help from the pull down menu on the top horizontal tool bar and click on "List". A list of the Access ID's for employees who can make changes to this field will appear. Scroll down until your Access ID is highlighted and click OK.

- **Action:** Click on the arrow and select the Approved option.

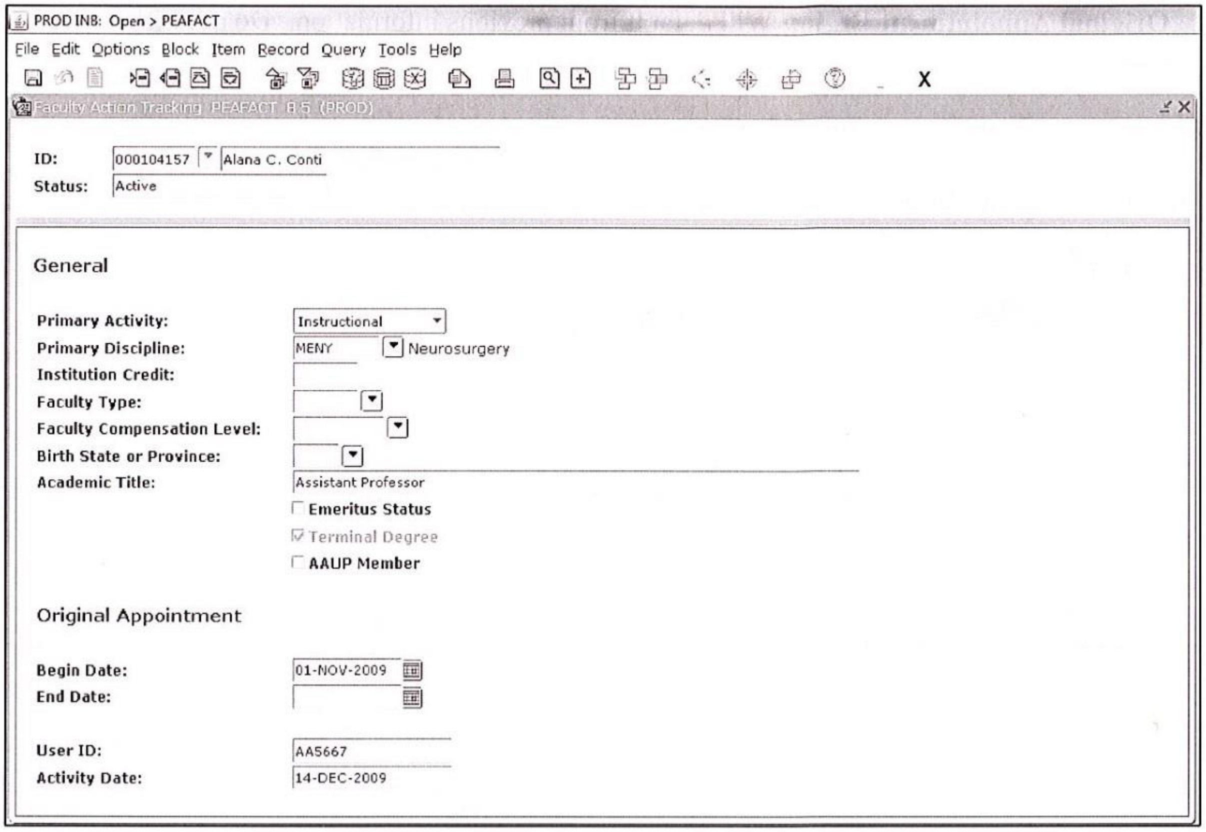
- **Date:** Current date will default in. Do not change.

- **Last Level:** Click in the box and a check mark will appear and save the record.

Entering a Joint Appointment

If a Faculty member is receiving a Joint Appointment that is not changing the Primary assignment information, the Joint Appointment will ONLY be entered in the PEAFACT form as a Secondary assignment. There will be nothing indicated on the PEAEMPL or NBAJOBS Forms for Joint Appointments.

Go to PEAFACT form and Enter the employee's Banner ID or Name.



Click on the first data field in which the system will allow your cursor to rest or press CTRL and Page Down keys.

- **Primary Activity:** Click on the arrow and the correct option, if applicable. The options used are:
  A. **Administrative:** For E-Classes C2, C9, D2, D9, S2, S9 and any Administrators who have Faculty Rank.

  B. **Research:** For Academic classifications that are specifically entitled Research.

  C. **Instructional:** For all other classifications.

- **Primary Discipline:** This should already default in. If the code is missing, enter the correct Discipline code. If you do not know the code, hit the F9 key or double click in the first space in the field. A pop-up window will appear. Scroll down to the correct Discipline, highlight and use the enter key to populate information in field. When you enter a defined code, the Discipline name will default in.

- **Academic Title**: Will default from the NBAJOBS Form. Do not make changes to this field.

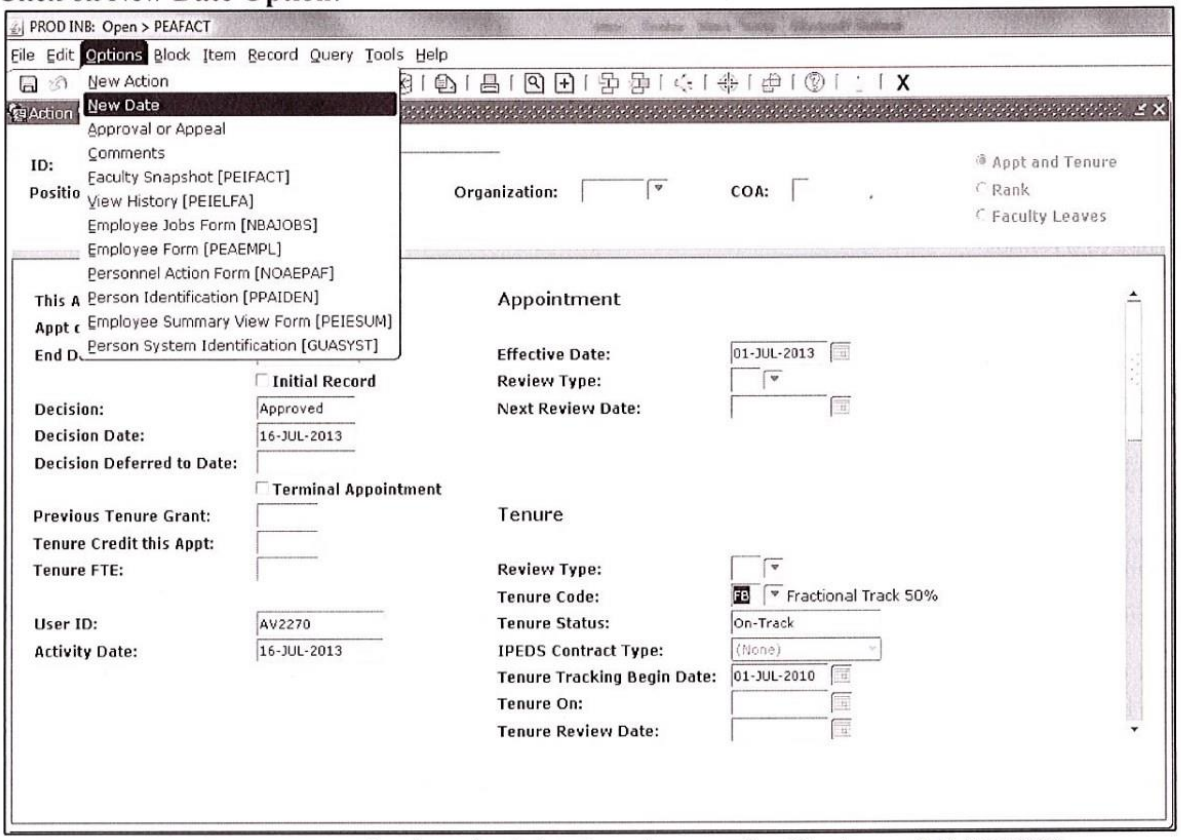
- **Terminal Degree:** This will default from the PPAGENL Form. Do not make changes to this field.

- **AAUP Member:** Will default from previous information. Do not make changes to this field.

- **Original Appointment Begin:** Will default from previous information. Do not make changes to this field.

Next, click on **Appt/Tenure Records Option**:

Click on **New Date Option**:



- **New Action Date:** Enter the date the Joint Appointment is effective as MMDDYY or as DD-MMM-YYYY.

- **Proposed Effective Date:** Enter the date the Joint Appointment is effective as MMDDYY or as DD-MMM-YYYY.

- Click OK or hit the Enter key twice.

- **This Action Date:** Will default from the New Action Date. Do not change.

- **Appt/Reappt Begin Date:** Enter the true date of the Joint Appointment is effective as MMDDYY or as DD-MMM-YYYY. A box may appear with the message: *ERROR* Appointment Begin Date must be Entered OK. Click OK. Enter the true date the Joint Appointment is effective as MMDDYY or as DD-MMM-YYYY. **NOTE:** It is possible to have multiple appointments at the same time.

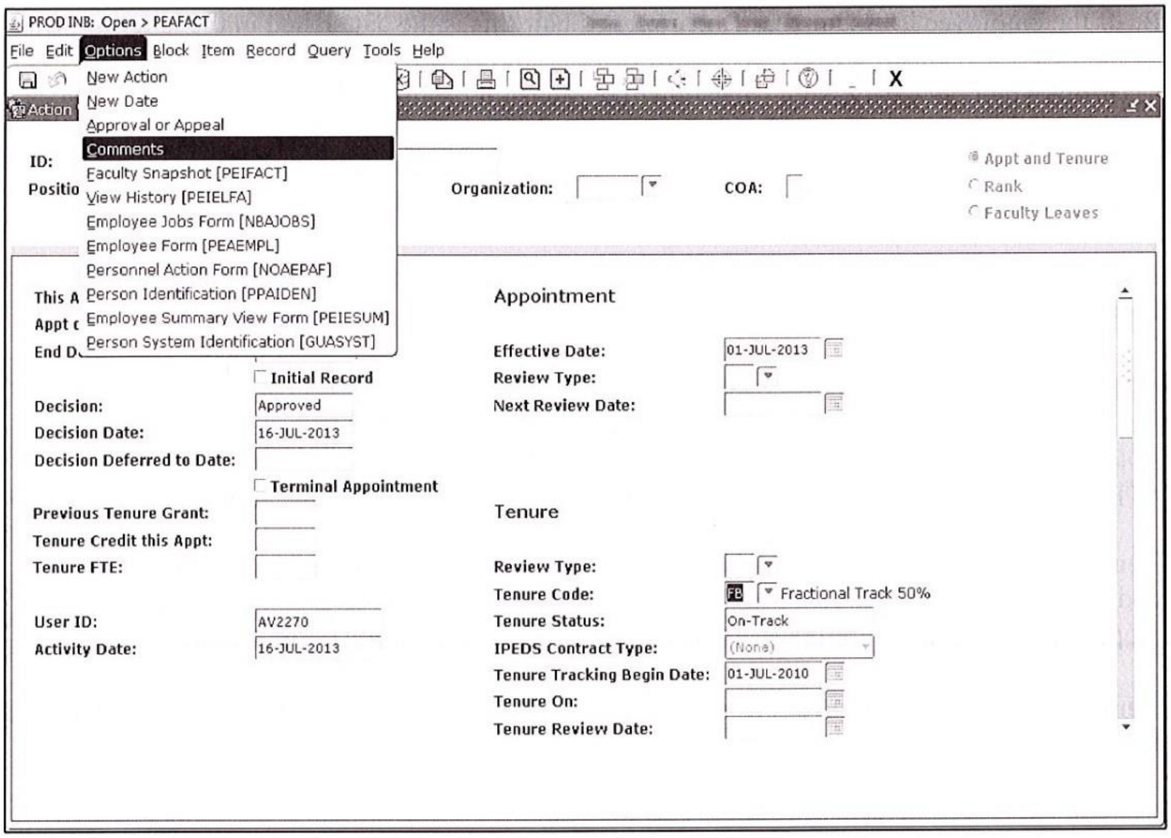
- **Appt/Reappt End Date:** This is the date the employee's contract ends and is entered as MMDDYY or as DD-MMM-YYYY and is determined as follows:
  A. If the employee is a Faculty or Academic staff member on a contract.

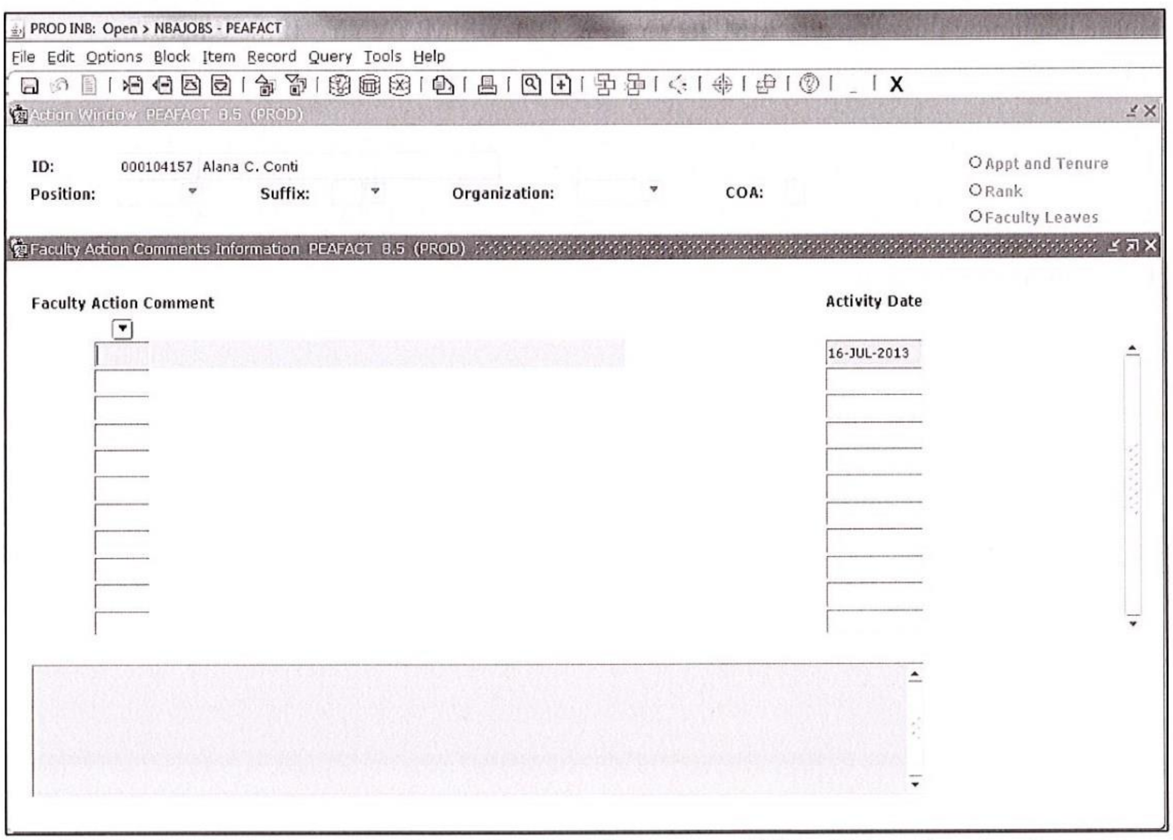
B. If the employee is assigned as Department Chair this is the date listed in the letter of offer that the assignment will be reviewed for renewal, even if the employee holds Tenure or Employment Security Status in another position at the University.

C. If the employee has Tenure or Employment Security Status and does not have a Department Chair assignment, this field should be left blank.

- **Appt Information Effective Date:** Will default from the Proposed Effective Date. Do not change.
- **Appt Information Next Review Date:** This field will only be used for Department Chairs and Voluntary Faculty. **Do not make changes to this field**. The Provost's Office staff is responsible for entering information in this field, duplicating the information in the Appt/Reappt End Date field. If information defaults in this field, **do not delete**.
- **Tenure Information Tenure Code:** The Tenure code may default in. If it did not or the code is changing, enter the correct Tenure code. If the Tenure code is not listed on Appointment Summary, return to the approver or originator for the correct code.
- **Tenure Information Tenure Status:** Defaults from the Tenure code. Cannot make changes in this field.
- **Tenure Information Tracking Begin:** If the employee's appointment is a Tenure Track Appointment, enter the date you wrote down on the PAF (PERSONNEL ACTION FORM) before beginning this screen as MMDDYY or as DD-MMM-YYYY. If the employee's appointment is not a Tenure Track Appointment, leave blank.
- **Tenure Information Tenure On:** If the employee holds Tenure, enter the date you wrote down on the PAF (PERSONNEL ACTION FORM) before beginning this screen as MMDDYY or as DD-MMM-YYYY. If the employee does not have Tenure, leave blank.

Click on **Comments Option**:





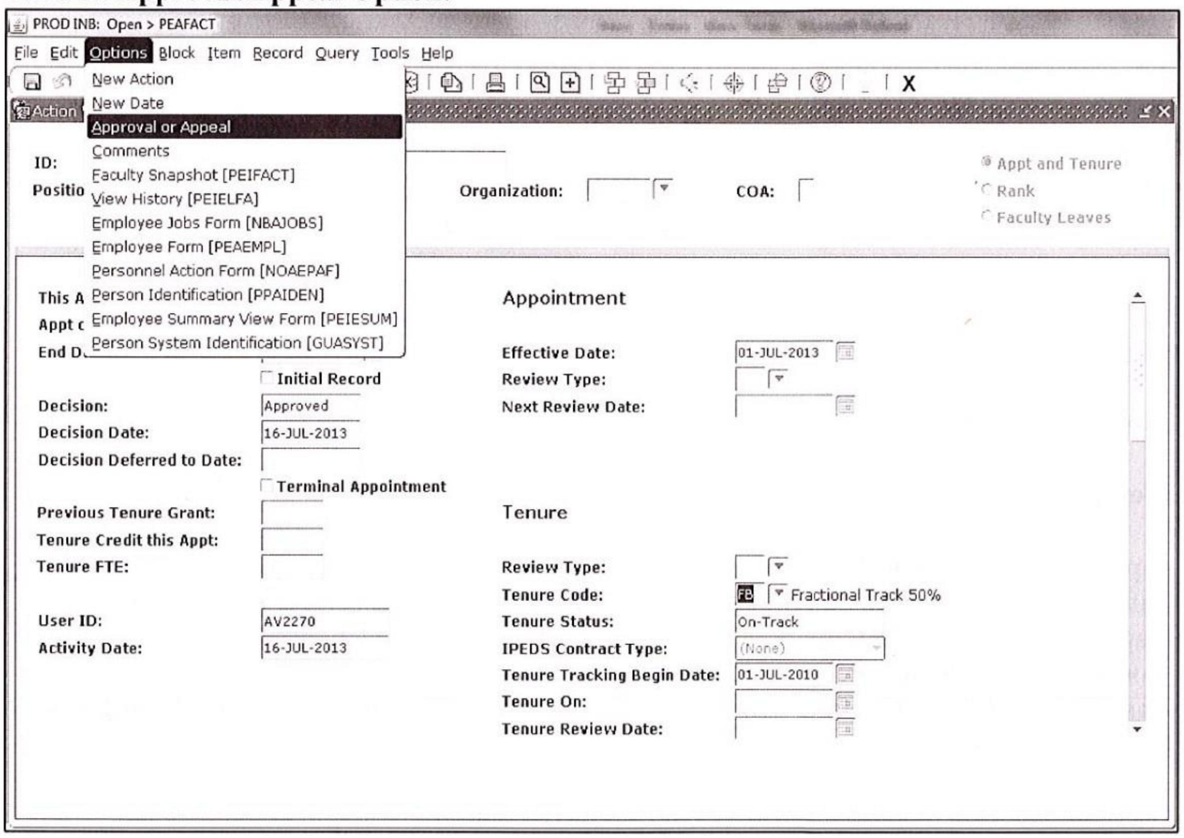
- **Faculty Action Comment:** Enter JA in the first box available. If there is any other information already listed in this field, do not change. The Provost's office uses this field to show the TR (Tenure Resides) or TTR (Tenure Track Location) codes, along with the

Department codes associated with the employee's Tenure/Tenure Track locations. When a defined code is entered, the description attached to the code that will default in.

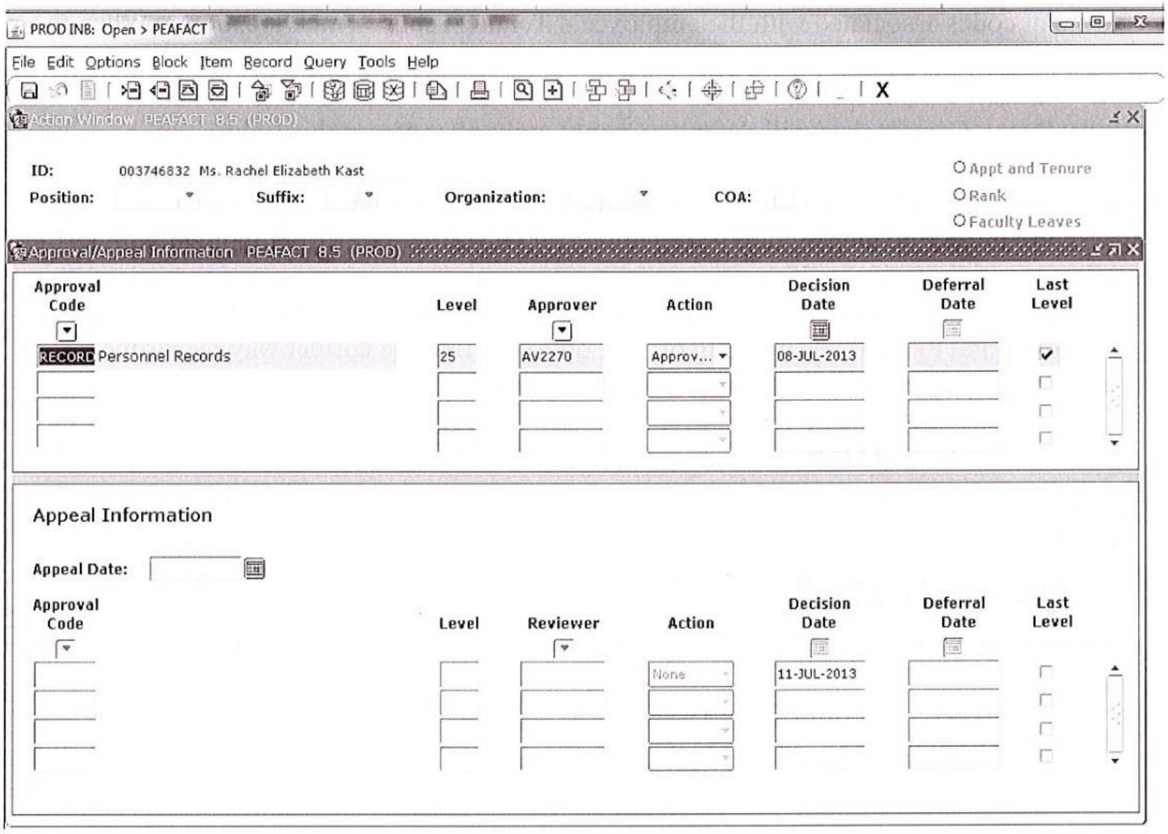
- **Activity Date:** Current date will default. Cannot make changes on this field.

- There is also one long space at the bottom of the Comments screen. In this space, enter the Joint Appointment and Department information (for example: Joint Appointment with 0614 Radiology 0618 Pediatrics). If you do not know the exact Department name, go back to the Faculty Action Comment field and hit the F9 key or select Help from the pull down menu on the top horizontal tool bar and clicking on List option to find the correct way Department name spelling to enter in this space and save the record.

Click on **Approval/Appeal Option:**



This takes you to the Approval/Appeal screen:

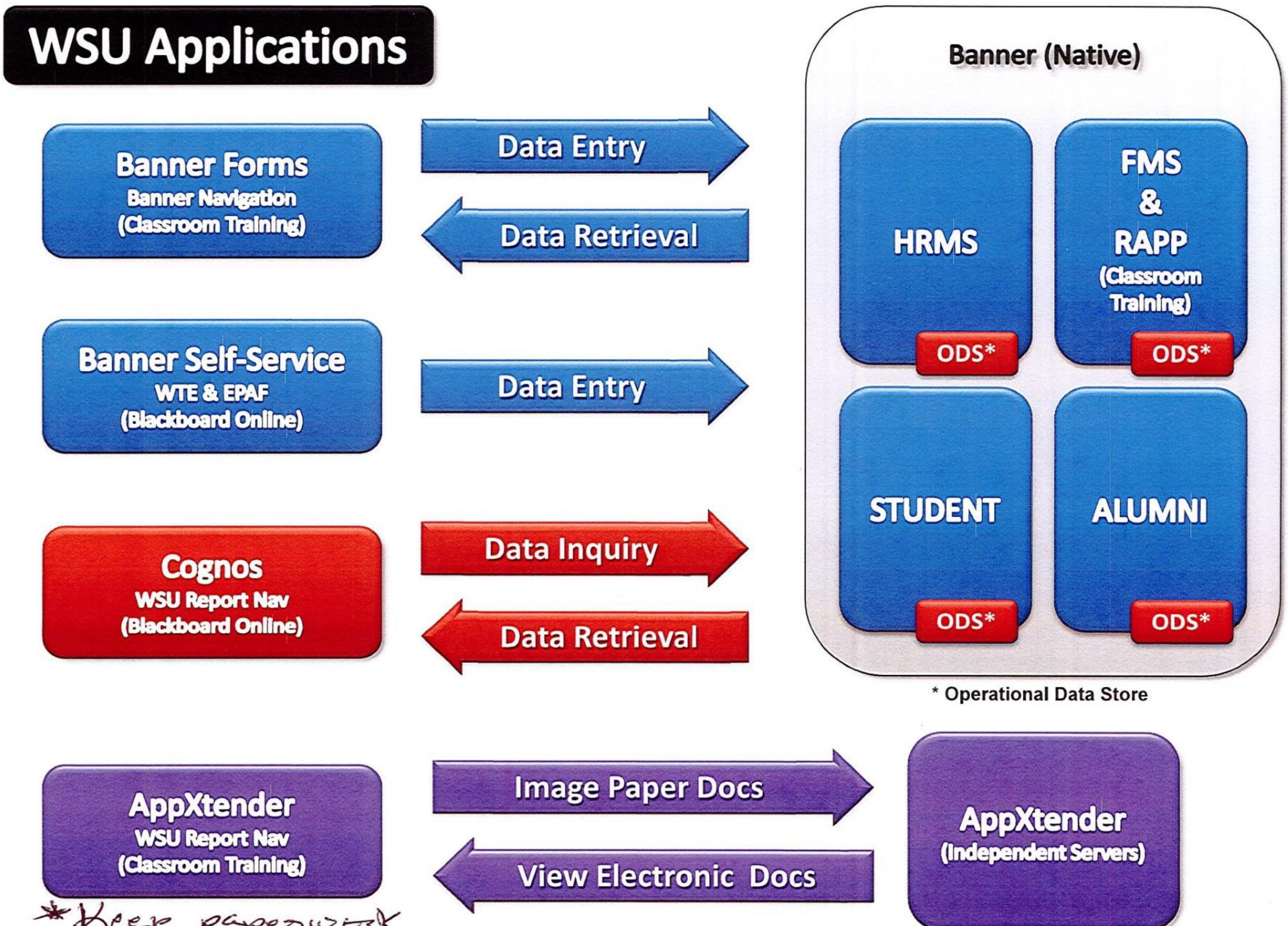


- **Code:** Type in Record.
- **Level:** Will default from Code. Cannot make changes in this field.
- **Approver:** Enter your Access ID. If this is the first time in a session that you are entering information on this field, you may get an error message that your Access ID is invalid. If this happens, while in the field hit the F9 key or select Help from the pull down menu on the top horizontal tool bar and click on ”List”. A list of the Access ID's for employees who can make changes to this field will appear. Scroll down until your Access ID is highlighted and click ”OK”.
- **Action:** Click on the arrow and select the Approved option.
- **Date:** Current date will default in. Do not change.
- **Last Level:** Click in the box and a check mark will appear and save.

Posting Screen/OHS for Represented

OHS 1, 2, 3

Banner Navigation



*Keep paperwork for 8 Days- Than Shred.

Personnel Doc only only the Law that say they can have PDF

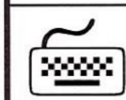
make sure all Documents are "PDF"

Banner Navigation

Session Organization

This session was designed to be instructor-led and follows traditional classroom activities you may have been previously exposed to. In this course, the instructor will present information about how to use Banner and – at times – ask that you complete activities and exercises in this manual. You will find that following along in the manual will help you to successfully complete this course.

Please avoid trying to follow the instructor using your computer until asked to do so.

Session Manual Key	
	*Discussion*: Look, listen, interact, and learn! These pages will focus on concepts, highlight certain topics/items, or even ask for your feedback.
	*Procedure*: Look, listen. That's basically it...watch the demonstration and follow along in your manual.
	*On Your Own Activity:* The instructor talked about it, you've seen it...now perform the task following the steps provided.
	*Exercise:* Test your knowledge and skills! Complete the exercise per the instructions. If you need help...**just ask!** We want you to *succeed.*

Banner Navigation - Session Agenda

Lesson 1: Introduction to Banner
- Topic 1: The Function of Banner
- Topic 2: Systems Interfacing with Banner
- Topic 3: Major Features of Banner

Lesson 2: Getting Started in Banner
- Topic 1: Log On to Banner
- Topic 2: Parts of the Interface
- Topic 3: Forms
- Topic 4: Keyboard Shortcuts

Lesson 3: Banner Forms
- Topic 1: Types of Banner Forms
- Topic 2: Understanding Form Names
- Topic 3: Accessing Forms

Lesson 4: Performing Inquiries
- Topic 1: Querying and Using Wildcards
- Topic 2: Performing a Query Using a Form Field
- Topic 3: Performing a Query Using an Application Form
- Topic 4: Performing a Query Using an Inquiry Form
- Topic 5: Commonly Used Forms to Query

Lesson 5: Defining and Understanding FOAPAL
- Topic 1: Define and Identify FOAPAL String and Elements
- Topic 2: Identify Index Codes

Lesson 6: Features In Banner
- Topic 1: Using the Calculator
- Topic 2: Using the Calendar
- Topic 3: Changing the Banner Password

Appendix : Session Key Points
- Topic 1: Toolbar Buttons
- Topic 2: Keyboard Shortcuts
- Topic 3: Form Names
- Topic 4: Common Inquiry Forms

Navigation - Session Overview

In Banner Navigation, you will learn how to:

- Log on to Banner
- Navigate within Banner
- Locate and Access Forms
- Execute basic Banner inquiries
- Understand FOAPAL

Upon completion of this class you will be an important part of the University-wide Banner network.

(Return to Table of Contents)

Lesson 1: Introduction to Banner - Overview

Introduction Overview

Assuming the Banner Information System is new to you, it is critical that you understand its role and function at WSU, the information systems that interface with it, and its major features.

By the end of this short discussion you will have identified the following:

1. The functions and major features of Banner.
2. The tools for navigating within Banner.

(Return to Table of Contents)

Topic 1: The Function of Banner

Banner is a *suite* of products. These products access a **common database** so that information can be shared across different systems that administer the numerous functions of the University. Some of the systems that Banner supports within the University are Student, HRMS, Alumni and FMS.

As a processor of information at WSU, you are certain to have diverse needs that vary widely in your unit. You may use Banner to access one system or many systems.

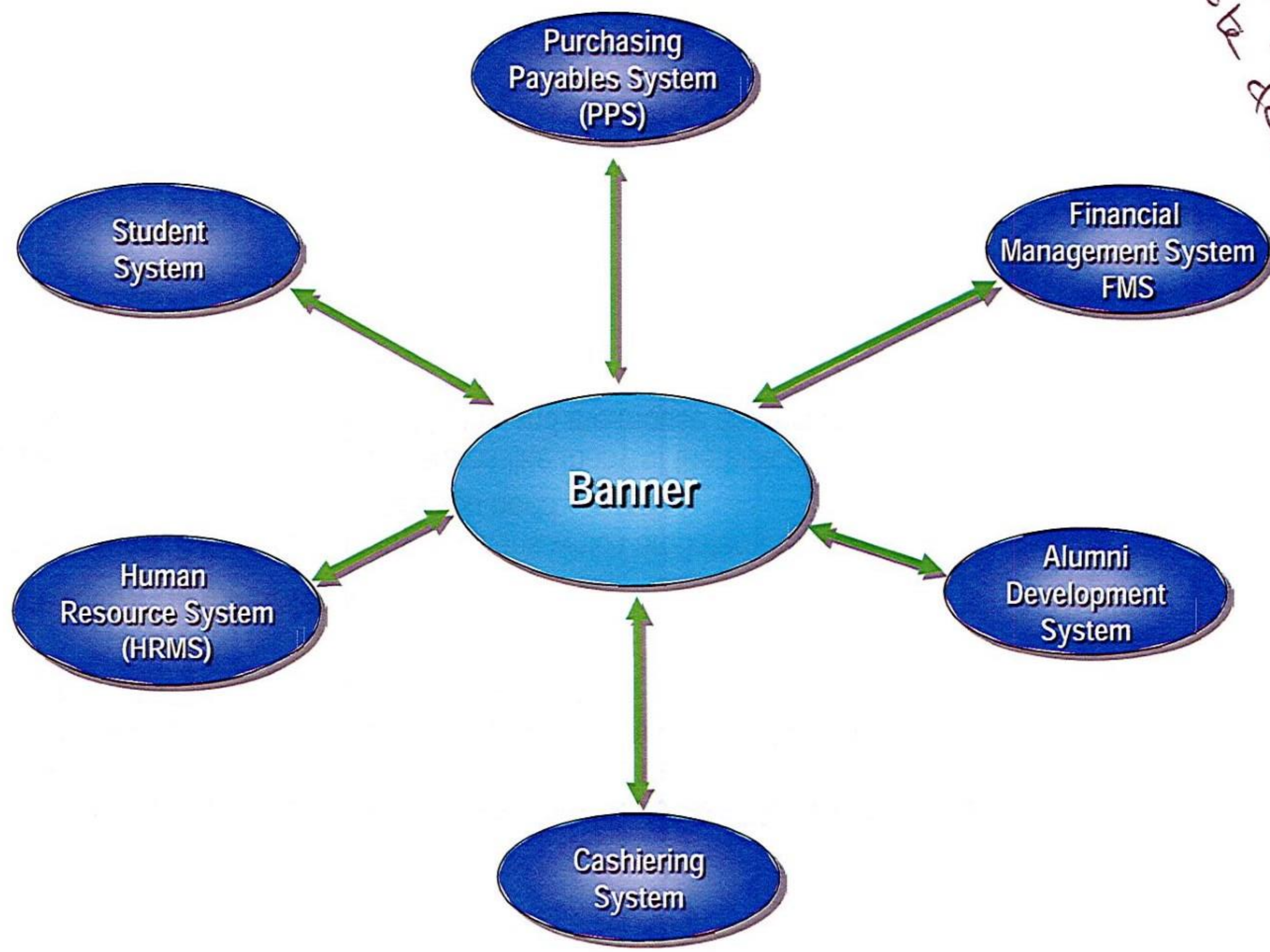
(Return to Table of Contents)

VPN.wayne.edu-
Remote desktop (Teah)

Topic 2: Systems Interfacing With Banner

Banner is a University-wide system which enables you to track, maintain and report your department's important information.

Let's begin by taking an overall look at Banner and its connection to other operations here at WSU, as shown with the graphic on the right.



(Return to Table of Contents)

Topic 3: Major Features of Banner

Major Features of Banner

Banner is an online product which utilizes the Oracle Relational Database Management System. At Wayne State University, Banner is integrated with systems such as Student, Alumni/ Development, Financial Management, and Human Resources. This capability enables you to access information that already exists in any of these systems.

Banner includes the following major features:

- **Internet-Based** — Banner 7.x provides many functions which are internet-based. A primary benefit is improved access to the tools you need.
- **User-Friendly Design**—Banner looks and operates like many of the typical "windows" applications you're already using! Menus and the mouse are available to users.

(Return to Table of Contents)

Lesson 2: Getting Started in Banner - Overview & Agenda

Lesson Overview

The Banner interface is designed as a Graphical User Interface (GUI). A GUI uses pictures to represent features and functions of Banner, allowing simple control of the program.

This lesson will introduce you to the basic layout of Banner and the names and functions of key elements of the program interface.

Before you can navigate within Banner, you will need to differentiate between "areas" of the software. Doing so will help you in the lessons that follow – and ultimately ensure your success in using Banner effectively.

Lesson Agenda

Topic 1: Log On To Banner
Topic 2: Parts of the Interface
Topic 3: Forms
Topic 4: Using the Mouse and Keyboard

(Return to Table of Contents)

Topic 1: Log On To Banner

To begin working in Banner, you must log on to the system.

To do this back at your desk, you will need three things:

1. WSU Access ID
2. * Banner access account and a Banner "profile" which gets you "in the door" to do what you need to do for your job.
3. Compatible browsers:

   ** Internet Explorer

   ** Firefox

* Banner security access forms are located at this website :

  http://computing.wayne.edu

** Latest system requirements are listed at:

  http://computing.wayne.edu/hardware

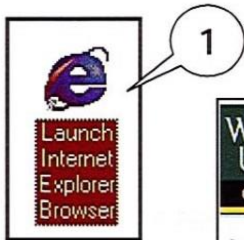
(Return to Table of Contents)

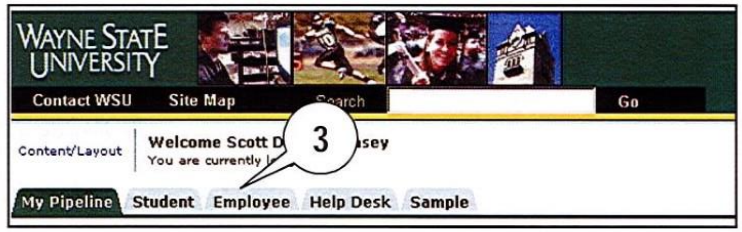
Procedure: Log On To Banner

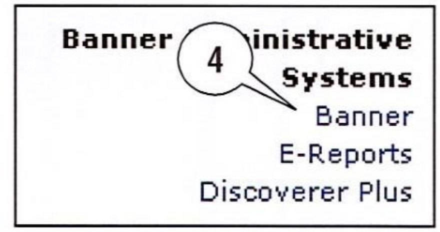
imaging.wayne.edu
bireporting.wayne.edu

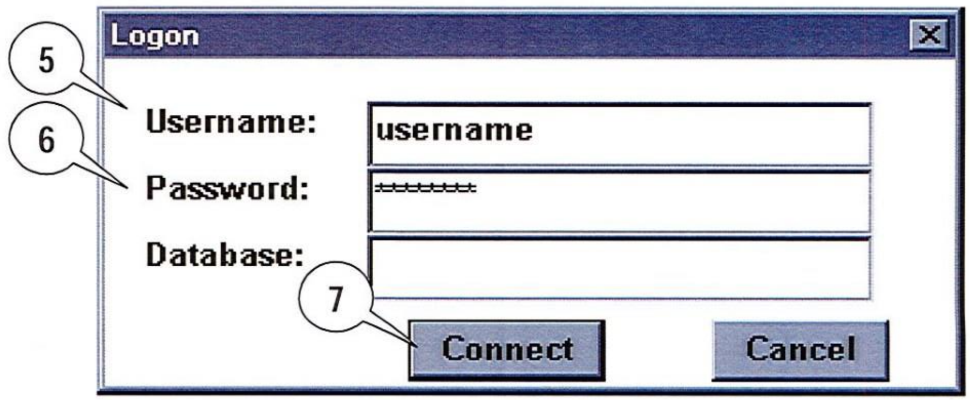
Procedure:

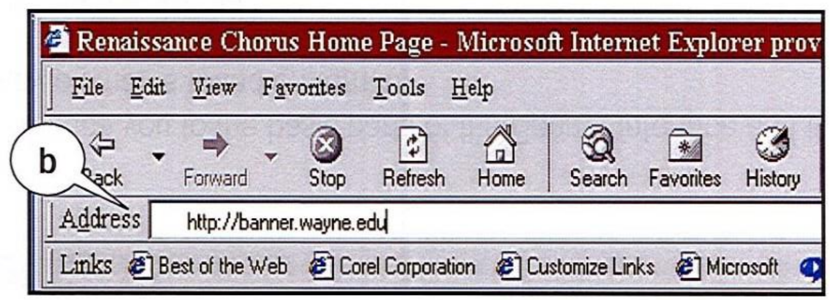
1) Launch your internet browser.
2) Log on to WSU Pipeline.
3) Click the *Employee* tab.
4) Click the *Banner* link located on the left side portion of the screen.
5) Enter your **user name**.
6) Enter your **password**.
7) Click the **Connect** button. *Banner will open*











Alternate access to Banner:

a) Launch your internet browser.
b) Enter **banner.wayne.edu** in the address field - click 'go'.
c) Follow steps 5-7 above.

(Return to Table of Contents)

Topic 2: Parts of the Interface

This lesson will introduce you to the basic parts of the Banner interface and the names and functions of key elements found on forms:

What you will learn in this topic:

- Menu bar
- Toolbar
- Auto hint
- Status line

Items needed to complete this topic:

- Access to the Banner icon
- User name
- User password

(Return to Table of Contents)

Discussion: Menu Bar & Toolbar

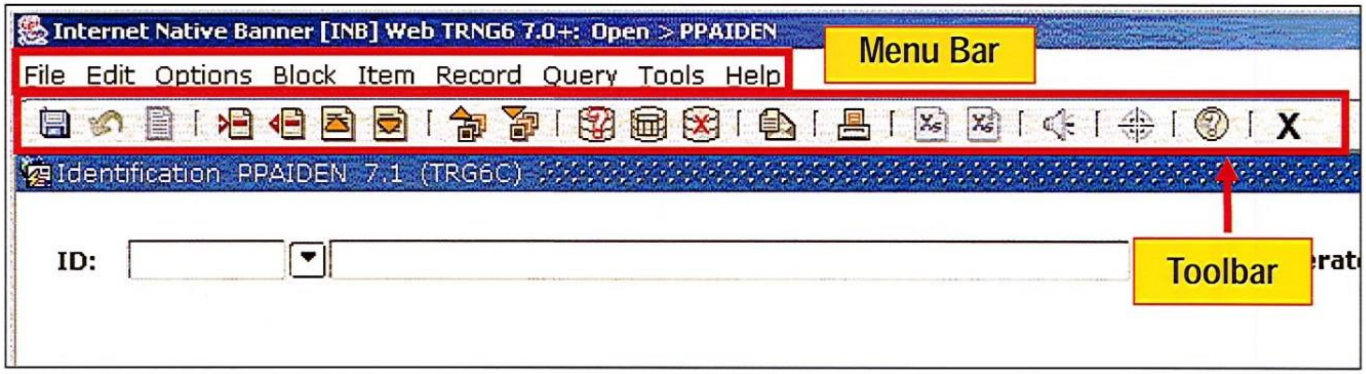
Menu Bar

The Banner menu bar, located at the top of every form, contains pull-down menus.

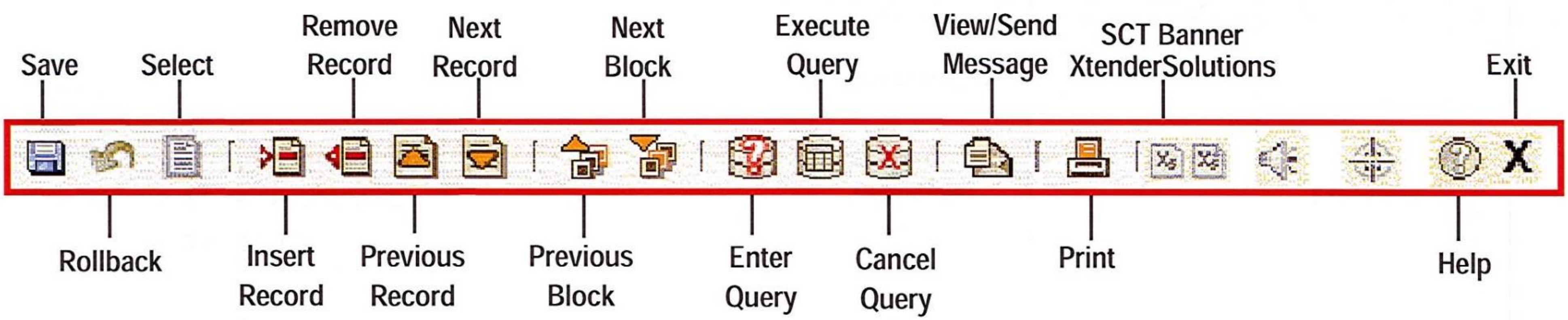
Note: If a menu item is dimmed, it is *disabled* and cannot be accessed.

Toolbars

The *toolbar* holds a set of buttons that offer quick access to commonly used Banner functions.



Tool Tips provide the name of the button the mouse cursor points at.



(Return to Table of Contents)

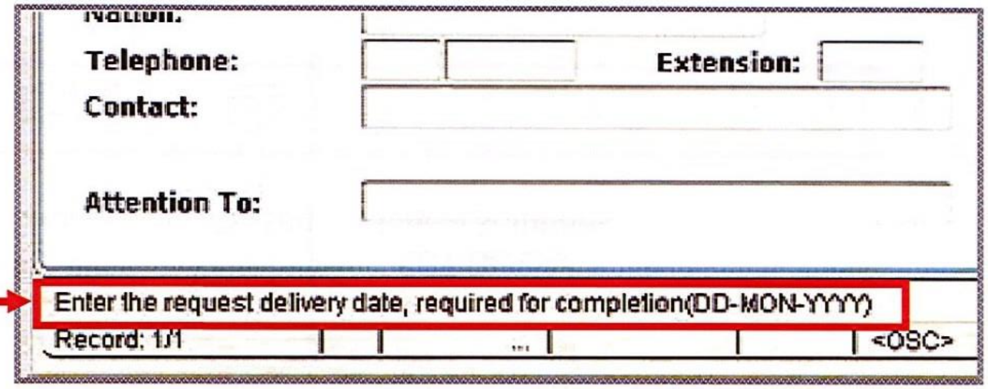
Discussion: Auto Hint Line

Auto Hint Line

The *auto hint line,* at the bottom of a form window, contains information about the field where the cursor is located:

- Gives KEY information about what you should do
- **Error** and **processing** messages
- Keyboard equivalents, if you can access other blocks, windows, or forms from the field

Auto Hint—field description



NOTE: Look at your auto hint line **frequently**. This is the only place where Banner tells you what it can and can not do!

(Return to Table of Contents)

Discussion: Sample Auto Hint Messages and Status Line

Sample Auto Hint Messages
• Query caused no records to be found. Re-enter.
• Mandatory required field.
• Invalid function; press SHOW KEYS for valid functions.
• Enter a name Last, First, Middle and press enter or tab. Use the wildcard % if needed.
• Enter NEXT or leave BLANK for automatic assignment or enter document number.
• Enter document type or choose LIST to view valid options.
• Request is approved – no changes are allowed.
• Press Enter to start selection or expand/collapse menu.

Status Line

The *status line,* beneath the auto hint line, may contain the following messages:

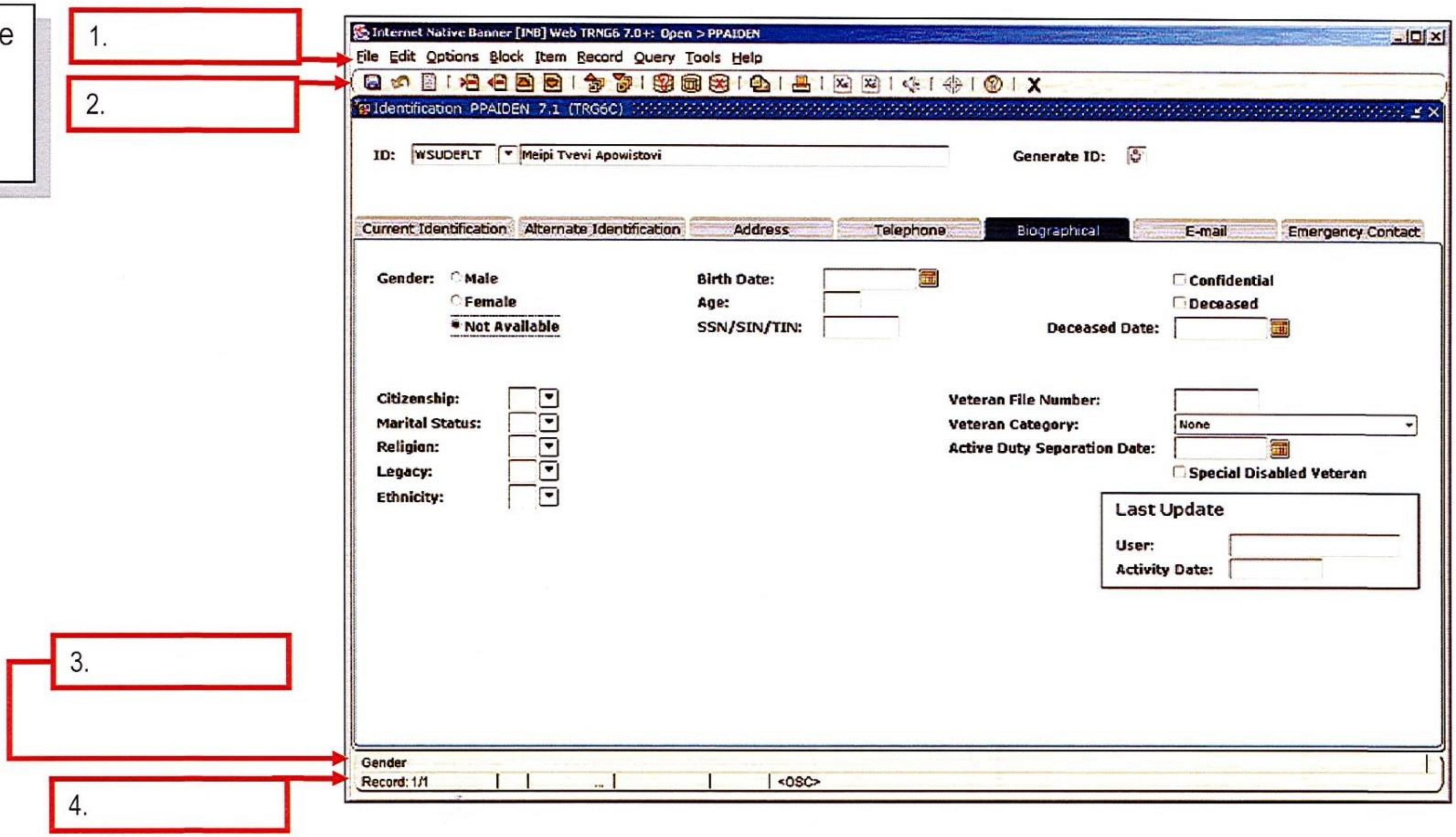
- Record n/n
- Enter query

(Return to Table of Contents)

On Your Own Activity: Parts of the Interface

Identify these parts of the interface by filling in the blanks using the following terms below:

- Status Line
- Menu Bar
- Auto Hint
- Toolbar



(Return to Table of Contents)

Topic 3: Forms

A form is an online document where you can enter and look up information in Banner. A form visually organizes information so it is easier to enter and read.

A form is made up of fields. Data is entered into fields within Banner A form also has common parts such as a title, window(s), key blocks and data blocks.

A form in Banner is similar to a paper document except information is only entered once and can then be used by other Banner forms. The more you know and understand the parts of the form, the easier it will be for you to work in Banner.

What you will learn in this topic:

- Key blocks and data blocks
- Fields
- Working with tabs
- The Options menu

(Return to Table of Contents)

Discussion: Layout of a Banner Form

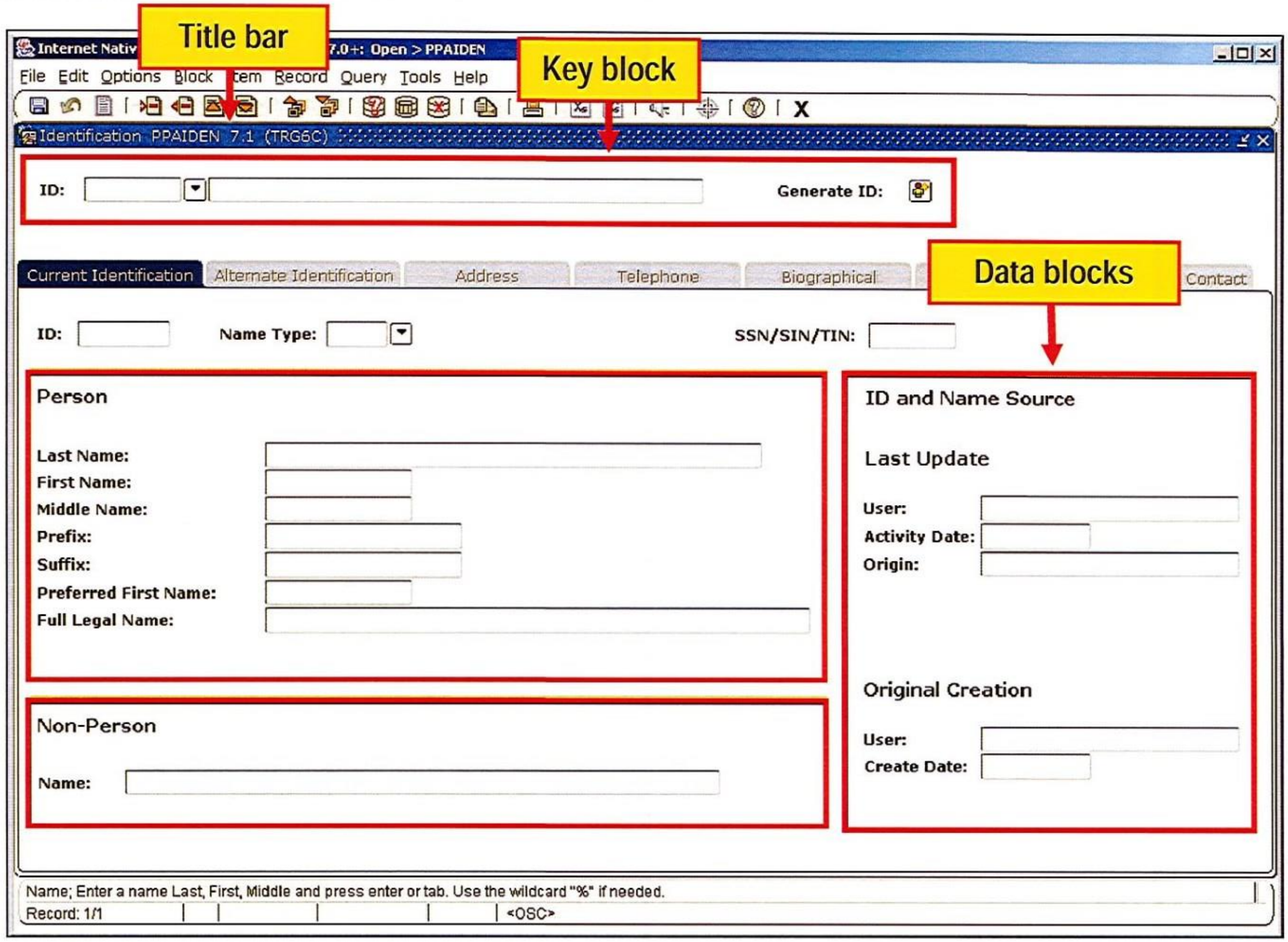
Data is entered into Banner on forms.

Think of these forms as paper documents because they have many of the same features. On a paper document, like an Employee Information form, you have a:

- Title (name of the document)
- Windows (Sections & Blocks)
- Key Blocks (specific document #)
- Fields

Similarly, Banner forms have many of the same design elements:

- Titles
- Windows
- Key Blocks
- Data Blocks
- Fields



(Return to Table of Contents)

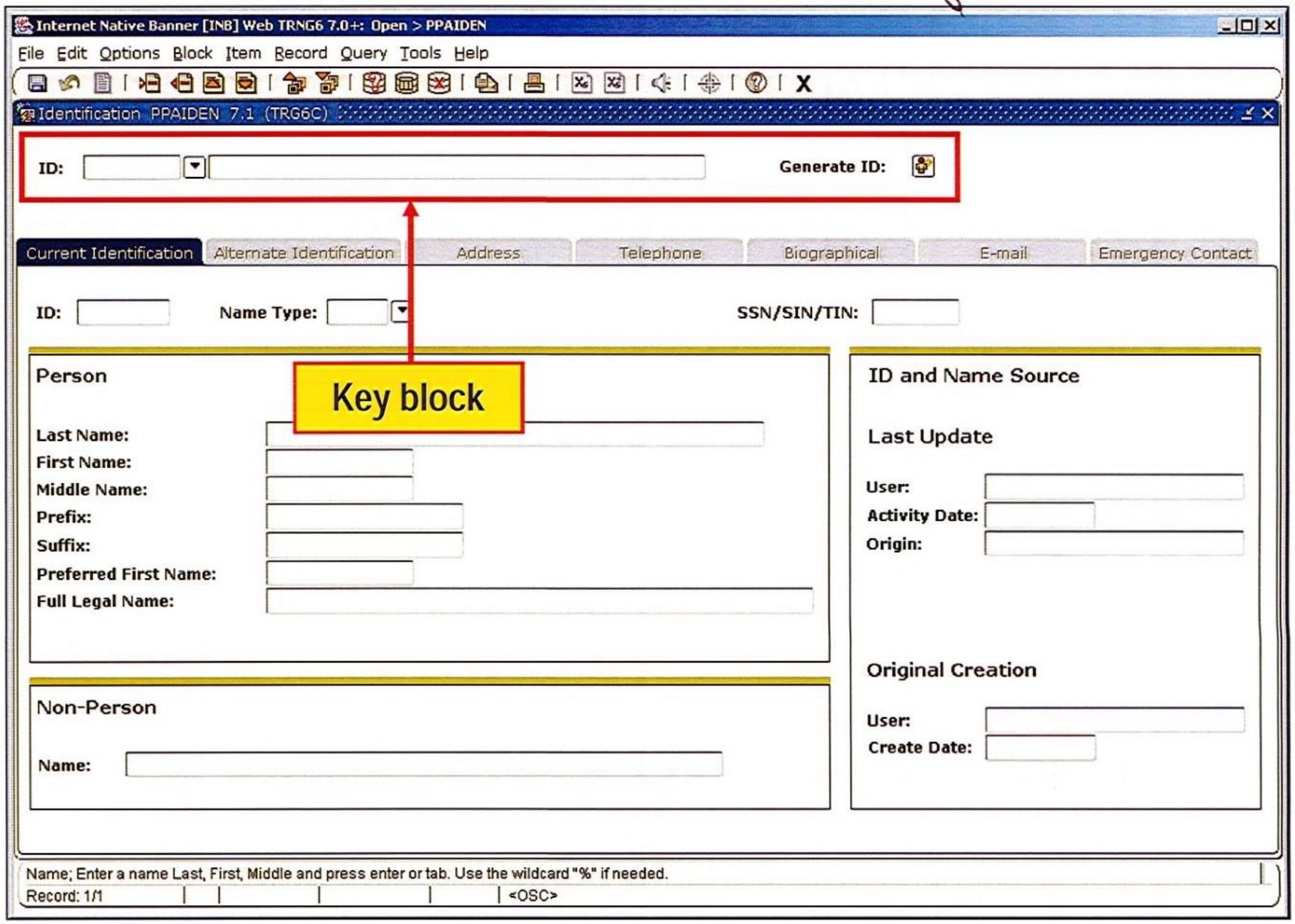
* Ctrl Pg down take you to each blocks

Discussion: Key Blocks

The first block on most forms contains **key** information. This *key block* generally identifies the record, which determines what is entered or displayed on the rest of the form. All information on the form refers to the Key block.

The **Key block** has at least one field and many times more. For example, a form that maintains financial information may have Key block fields for both a chart of accounts and a fiscal year.

The Key block typically stays on the form as subsequent blocks appear.



When the cursor is in the key block, enterable fields in the key block are enabled. These same fields are disabled when the cursor leaves the key block.

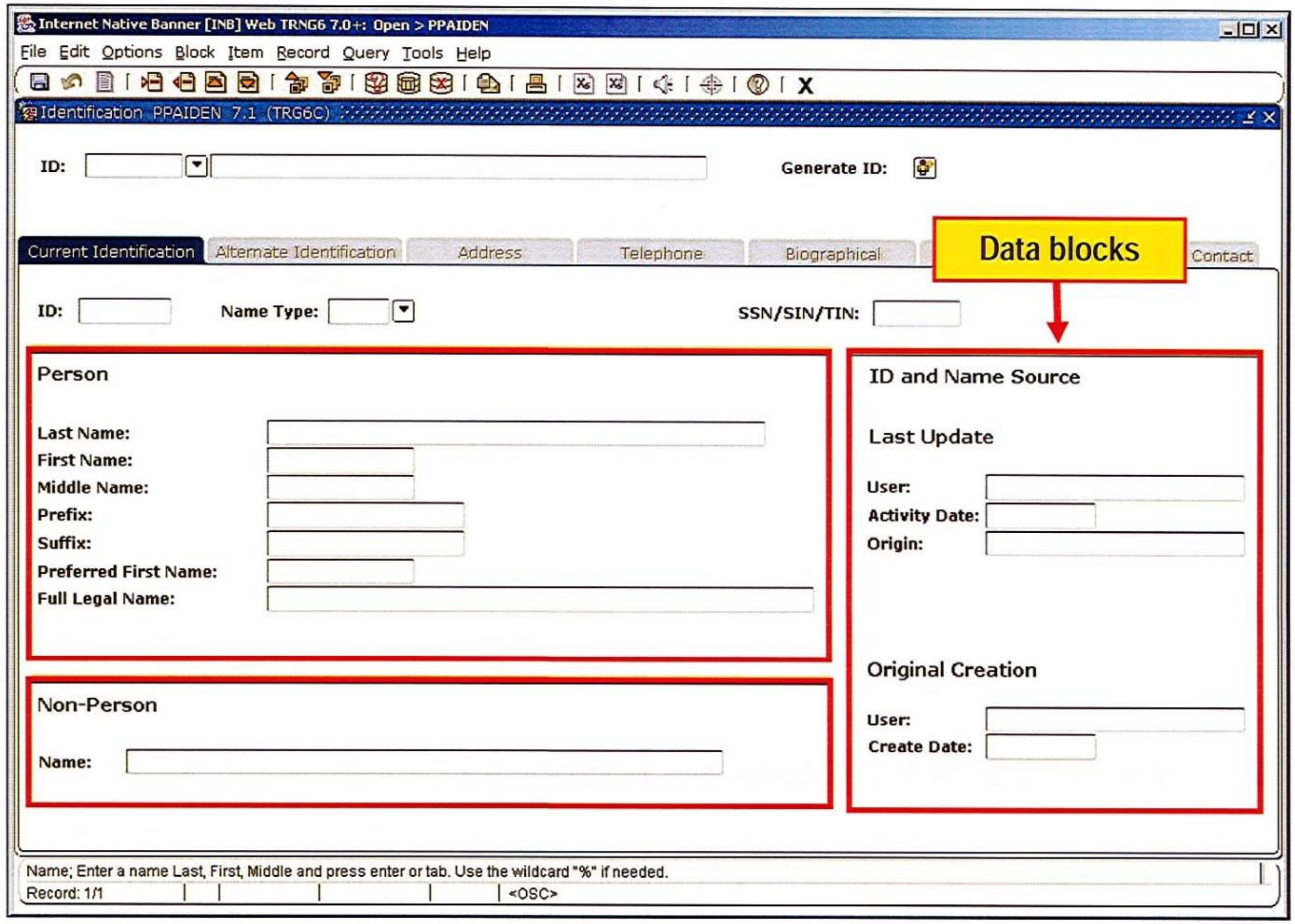
(Return to Table of Contents)

Discussion: Data Blocks

A **Data block** is a section of a form or window that contains information related to the record identified in the key block.

If a form or window contains more than one block, each block will have a yellow border at the top.

Note: To move from the **Key block** to the **Data blocks**, do a Next Block. This action populates the data fields with information that exists.



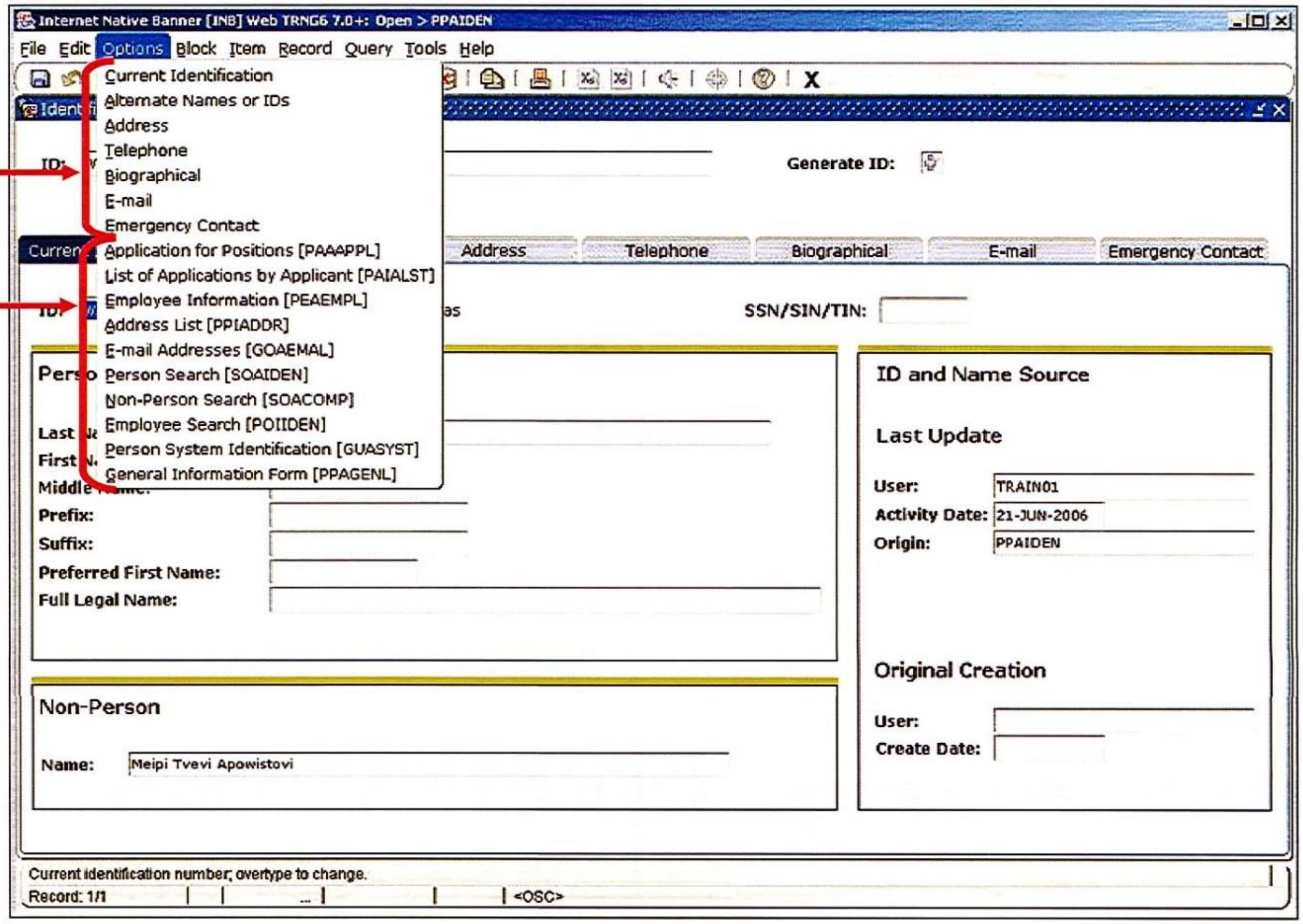
(Return to Table of Contents)

Discussion: Options Menu

The **OPTIONS** menu contains links that take you to other blocks and windows *within* the current form.

Additional links take you *outside* the current form to other related forms.

The available options change as the cursor location changes within a form.

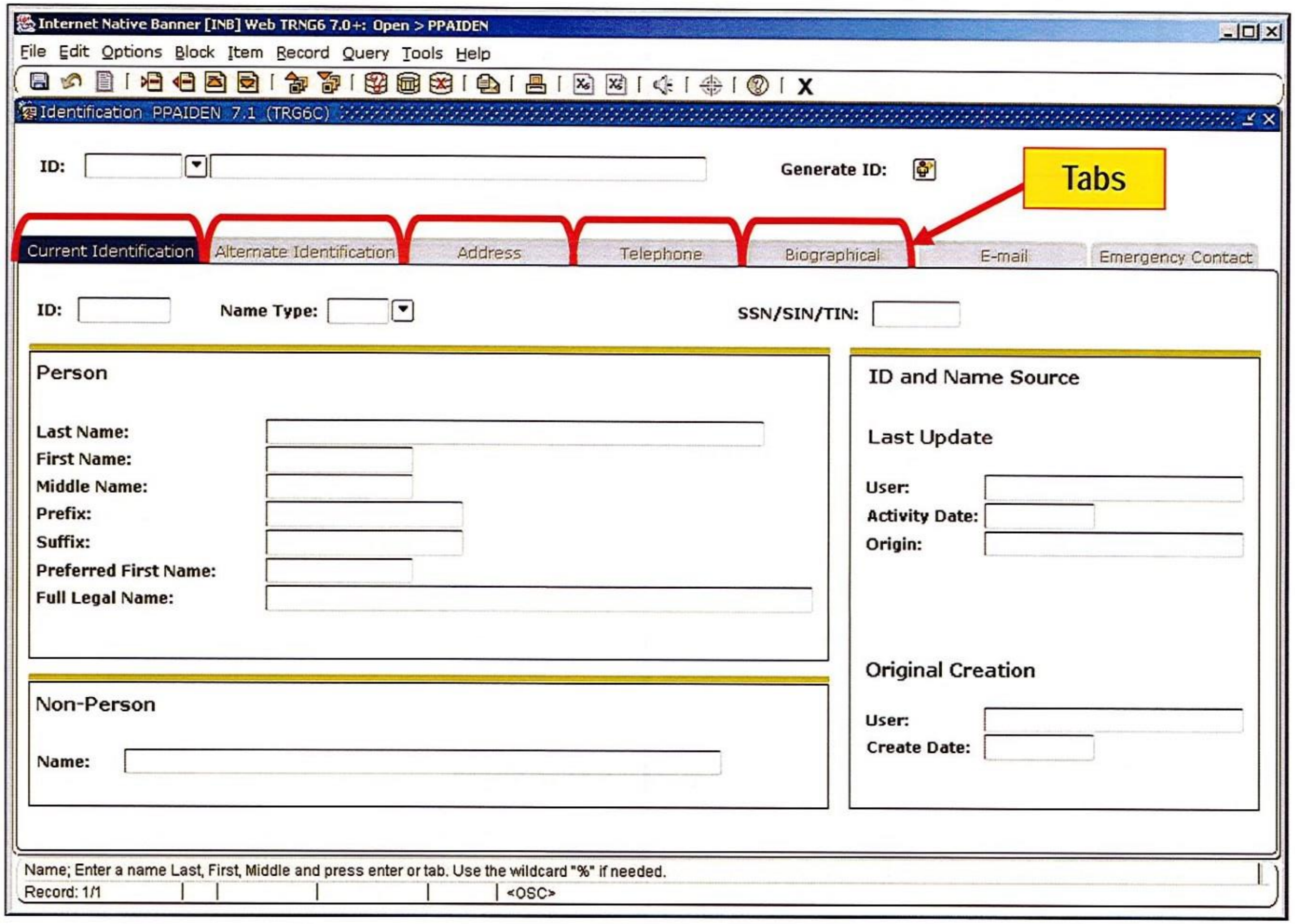


(Return to Table of Contents)

Discussion: Using Tabs

Some forms provide navigation tabs that allow you to move from one section of a form to another:

- Some navigation tabs allow you to move to different data blocks of the current form at random.
- Some forms do not allow you to advance to another tab until you have completed all required fields in the current data block.

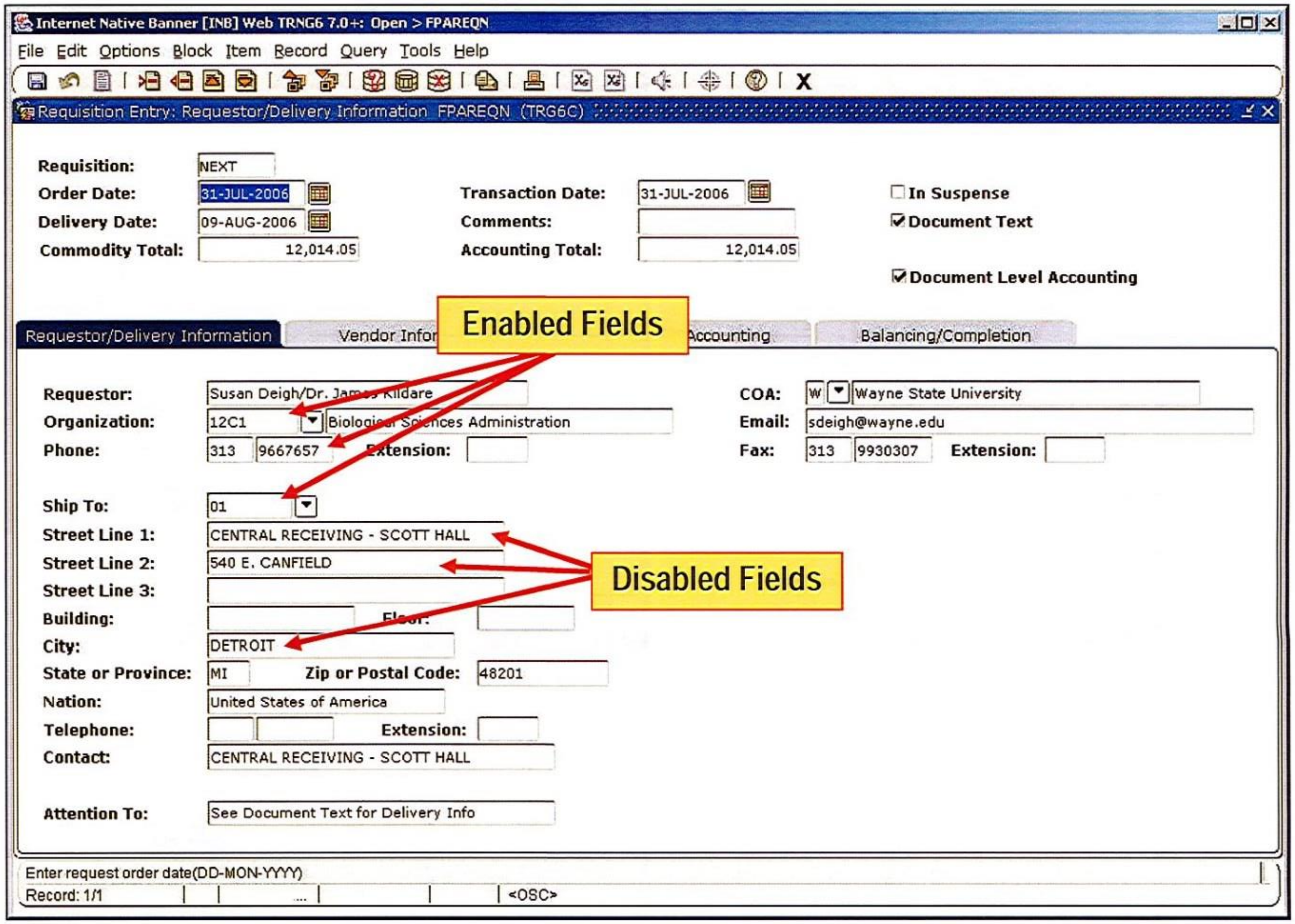


(Return to Table of Contents)

Discussion: Fields

Fields are areas on a form where you can enter, query, change, and display specific information. The following terms describe the status of a field:

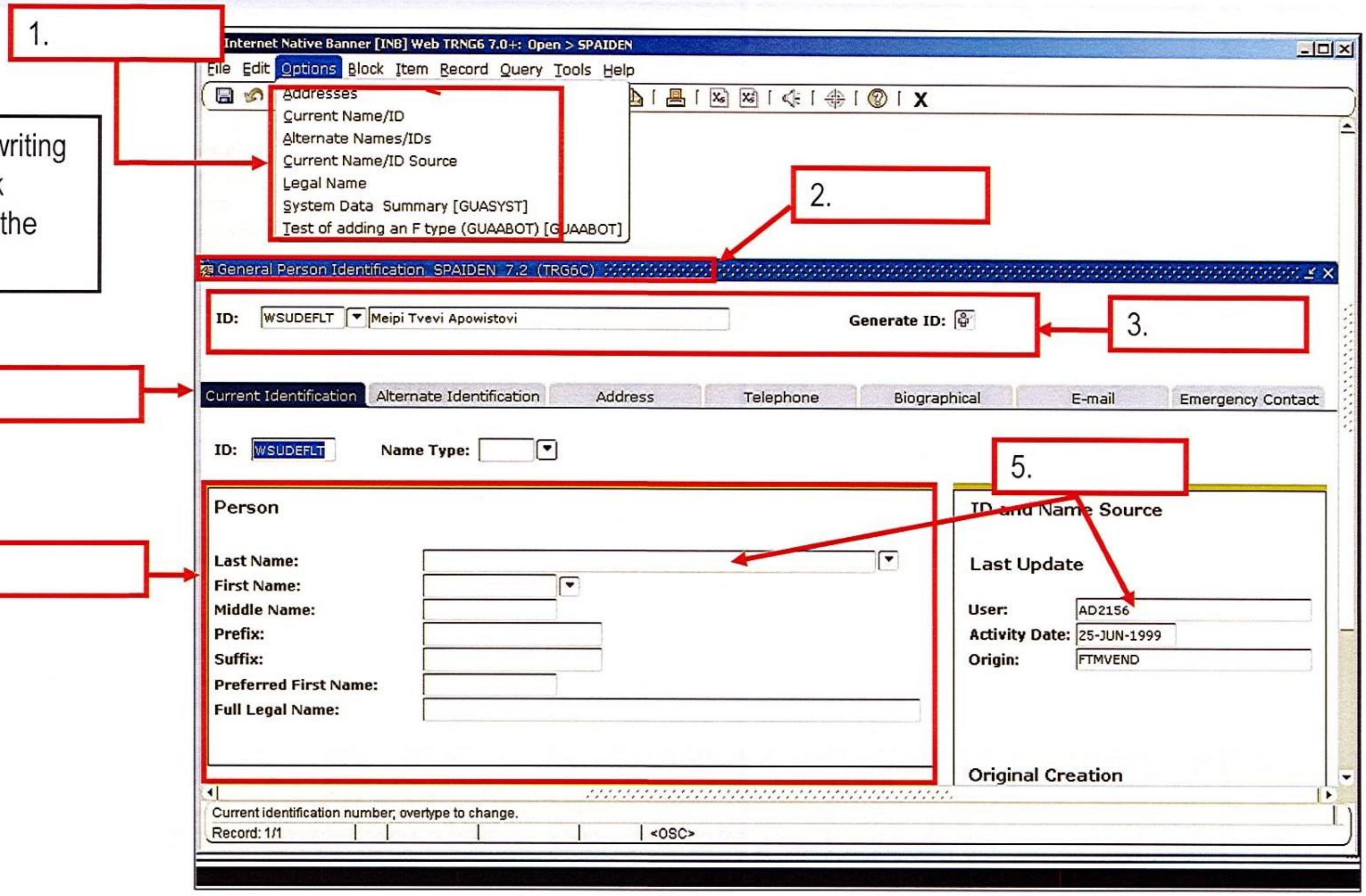
- **Enabled & Enterable**: You can put the cursor in the field and enter information.
- **Disabled & Display only**: You cannot put the cursor in the field and you cannot enter information. Typically, disabled fields are automatically populated by entries in other fields. This ensures the accuracy of information by preventing spelling and data entry errors.



(Return to Table of Contents)

On Your Own Activity: Parts of a Form

Identify these form parts by writing the correct name in the blank boxes next to the item using the terms in the column below.



Terms:

A. Fields
B. Options Menu
C. Data Block
D. Key Block
E. Title Bar
F. Navigation Tabs

(Return to Table of Contents)

Topic 4: Using the Mouse and Keyboard

Like other software applications, you may use many keyboard and mouse shortcuts to navigate within Banner.

What you will learn in this topic:

How to navigate through Banner using keyboard and mouse shortcuts.

(Return to Table of Contents)

Discussion: Keyboard Shortcut List

You can use **keyboard shortcuts** to ***quickly*** perform certain Banner functions

Here's a list of most of the keyboard shortcuts available here at WSU.

NOTE #1: Standard Windows shortcuts for copy (ctrl+c), cut (ctrl+x) and paste (ctrl+v) function within Banner.

Keys	Description
Ctrl F1	Display "Show Keys" window
F2 | shift + F2	-- | count query hits
F3 | shift + F3	-- | **SELECT** record
F4 | shift + F4	Record duplicate |
F5 | shift + F5	-- | Clear block
F6 | shift + F6	Insert record | Delete record
*F7 | shift + F7	**Enter** query | **Rollback** Will clears contents of the form
*F8 | shift + F8	**Execute** query | print
F9	**List – Search**
F10	Save changes
*Ctrl + pg ↓	Next block
*Ctrl + pg ↑	Previous block
Ctrl + u	Clear item field
*Tab	Next item field
Shift Tab	Previous item field (reverse direction)
*Ctrl + q close form	Acts as 'exit' button – cancels a query or exits current form

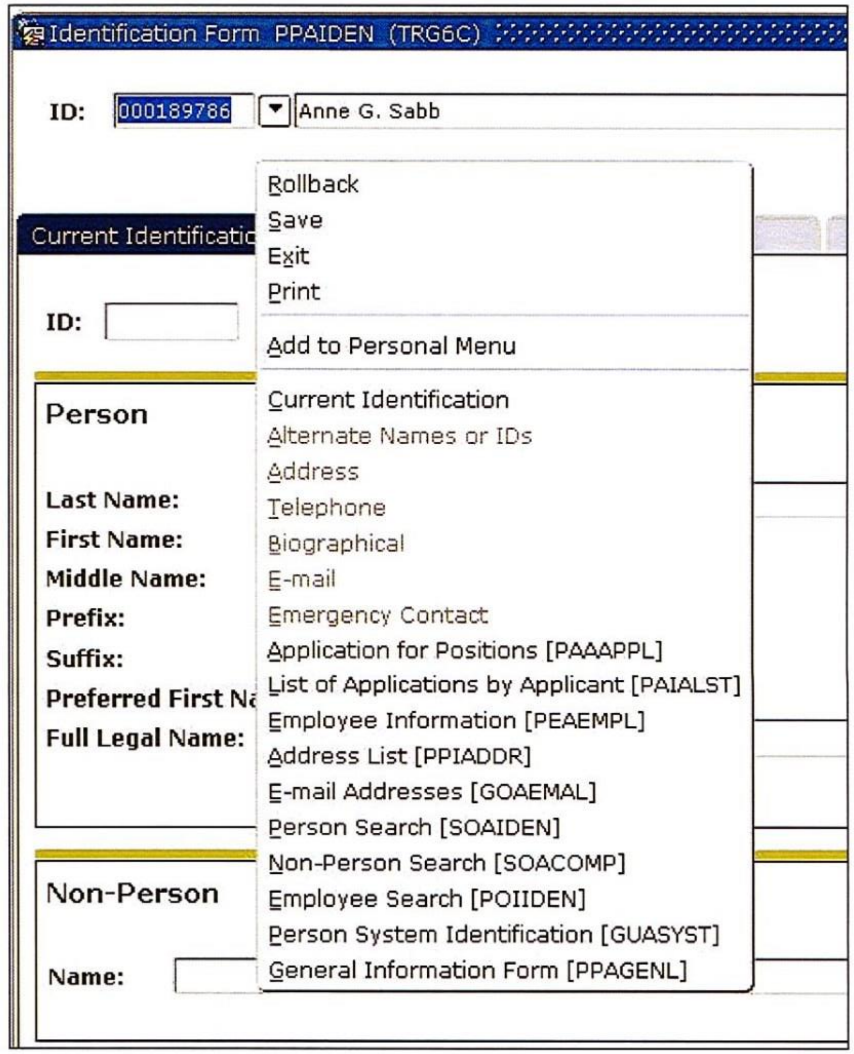
*Fundamental keystrokes for all users

(Return to Table of Contents)

Discussion: Mouse Shortcut

A useful mouse shortcut involves **right-clicking** on the screen inside a Banner form.

By doing so, a pop-up window appears providing all items from the options menu as well as a number of additional Banner functions such as rollback, save, exit, and print.



(Return to Table of Contents)

Review: Getting Started in Banner

In this lesson you:

- Learned how to log on to Banner. (Topic 1)
- Identified the parts of the Banner screen. (Topic 2)
- Learned common parts of a form and the typical form layout. (Topic 3)
- Learned how to use the mouse and keyboard to get around. (Topic 4)

Key concepts:

- The keyboard—Banner is inconsistent with the mouse, so we introduced you to keyboard shortcuts.
- Auto-hint line—This is where Banner talks to us.
- Options menu —Illustrates the logical flow of the business process.

(Return to Table of Contents)

Lesson 3: Banner Forms - Overview & Agenda

Lesson Overview

Like other software applications, there are multiple methods and procedures for navigating within Banner to complete a task.

Banner provides you with several ways to find and work with various forms. As you become familiar with Banner, you will be able to move about easily through the screens.

Lesson Agenda

Topic 1: Form Names - what they can tell you about a form's function

Topic 2: How to access Banner forms using

- Go to… field
- Direct Access
- Main Menu
- My Banner
- Last 10 Forms listed in the File menu

(Return to Table of Contents)

Topic 1: Understanding Form Names

Each form in Banner has a 7 character name – this name is an acronym which tells you about the type of information the form contains, the University business process it is related to, and much, much more.

What you will learn in this topic:

How to interpret the 7-character name of a form.

(Return to Table of Contents)

Discussion: Understanding Form Names – Continued

Position 1:
Identifies the **primary system** owning the form.

Position 2:
Identifies the **business process** (module) owning the form.

Position 3:
Identifies the form **type.**

Positions 4-7:
Uniquely **identifies** the form.

P	P	A	IDEN
1	2	3	4-7
• Accounting (T) • HR/Payroll / Personnel (P) • Position Control (N) • Student (S) • Financial (F)	• General Person (P) • Application (A) • Budget (B) • COBRA (C) • Benefit/Deductions (D) • Employee (E) • Electronic Approvals (R) • "Overall" to a business process (O) • General to a business process (G) • Purchasing (P)	• Application (A) • Inquiry (I) • Validation (V) • Maintenance (M)	Examples: • Identification (IDEN) • Position (POSN) • Encumbrance (ENCB) • Employee (EMPL) • Job information (JOBS) • Requisition (REQN) • Check (CHEK).

(Return to Table of Contents)

Discussion: Example Form Names

Some examples…

	Example: *FPAREQN*	Example: *SAAADMS*	Example: *POIIDEN*
Position 1: Identifies the **primary system** owning the form	F = Finance	S = Student	**P** = HR/Payroll/Personnel
Position 2: Identifies the **business process** (module) owning the form	**P** = Purchasing	**A** = Admissions	**O** = Overall to a business process
Position 3: Identifies the **type** of form	**A** = Application	**A** = Application	**I** = Inquiry
Position 4-7: Uniquely **identifies** the form	**REQN** = Requisition	**ADMS** = Admissions	**IDEN** = Employee Search Form (Employee, Applicant, COBRA)

(Return to Table of Contents)

On Your Own Activity: Understanding Form Names

For the Banner form *FGIENCB*, fill in the blanks below, identifying the elements of the form name:

1) The primary system owning the form
2) The business process owning the form
3) The type of form
4) The unique identification of the form

F = ____________________

G = ____________________

I = ____________________

ENCB = ____________________

(Return to Table of Contents)

Topic 2: Accessing Banner Forms

- Looking for a form.
- Banner 8 navigation.

Every time you log on to Banner, the "Main Menu" appears. From here, there are five methods by which you can open a specific form.

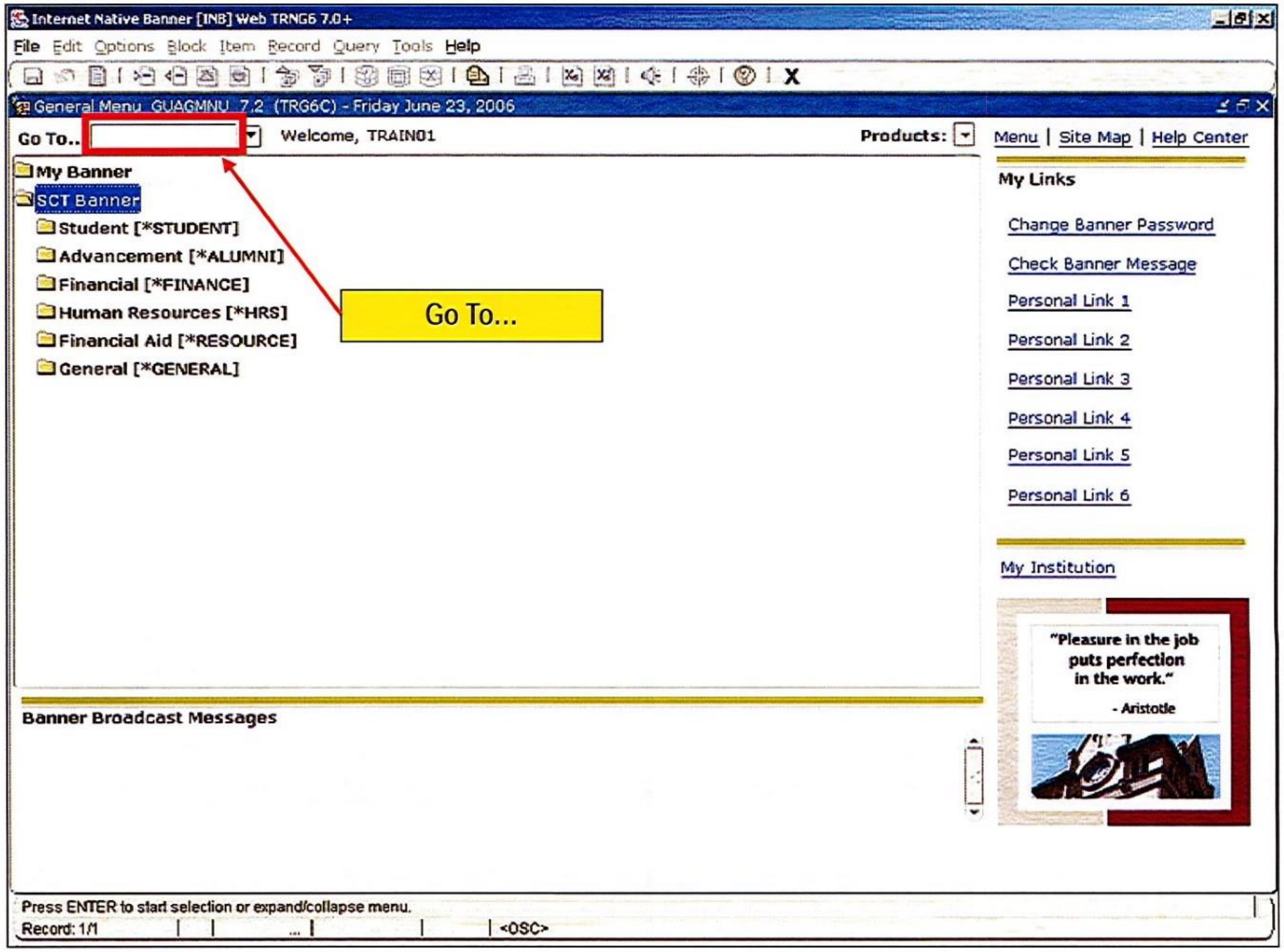
What you will learn in this topic:

- How to navigate to a specific form using the Go To… field on the Main Menu.
- How to navigate to a specific form using the Direct Access method.
- How to navigate to a specific form using the Main Menu folder hierarchy.
- How to use My Banner.
- How to navigate to a specific form using the Last 10 Forms option.

(Return to Table of Contents)

Discussion: Go To... Field

You can use the ***Go To...*** field to open a menu or form by typing its seven-character acronym into the field and pressing the *enter* key.



(Return to Table of Contents)

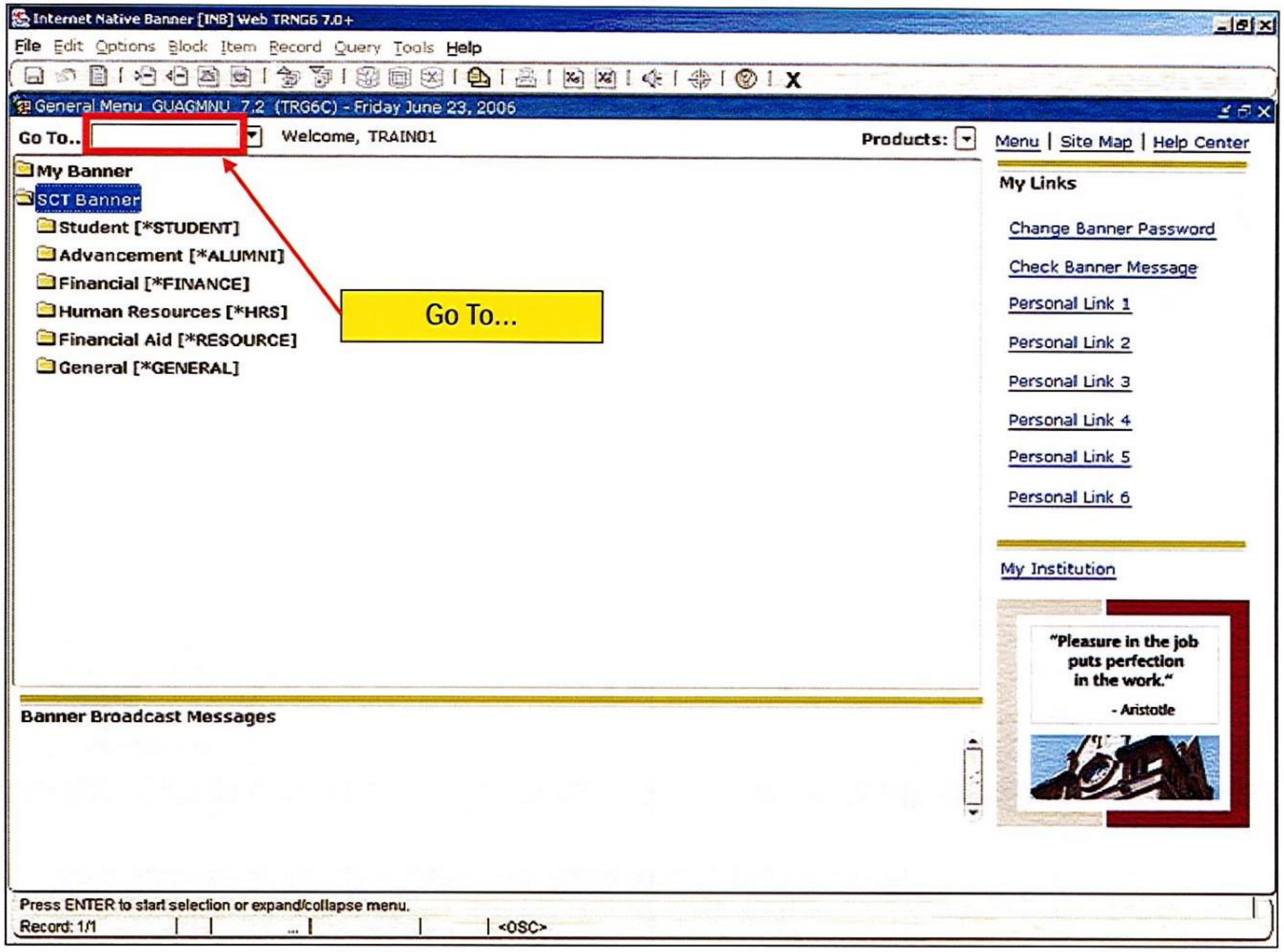
Procedure: Go To… Field

Using Go To… :

With Banner open:

1) Enter the seven-character name of the desired form in the **Go to…** field.
2) Press **Enter**.

The requested form is opened.



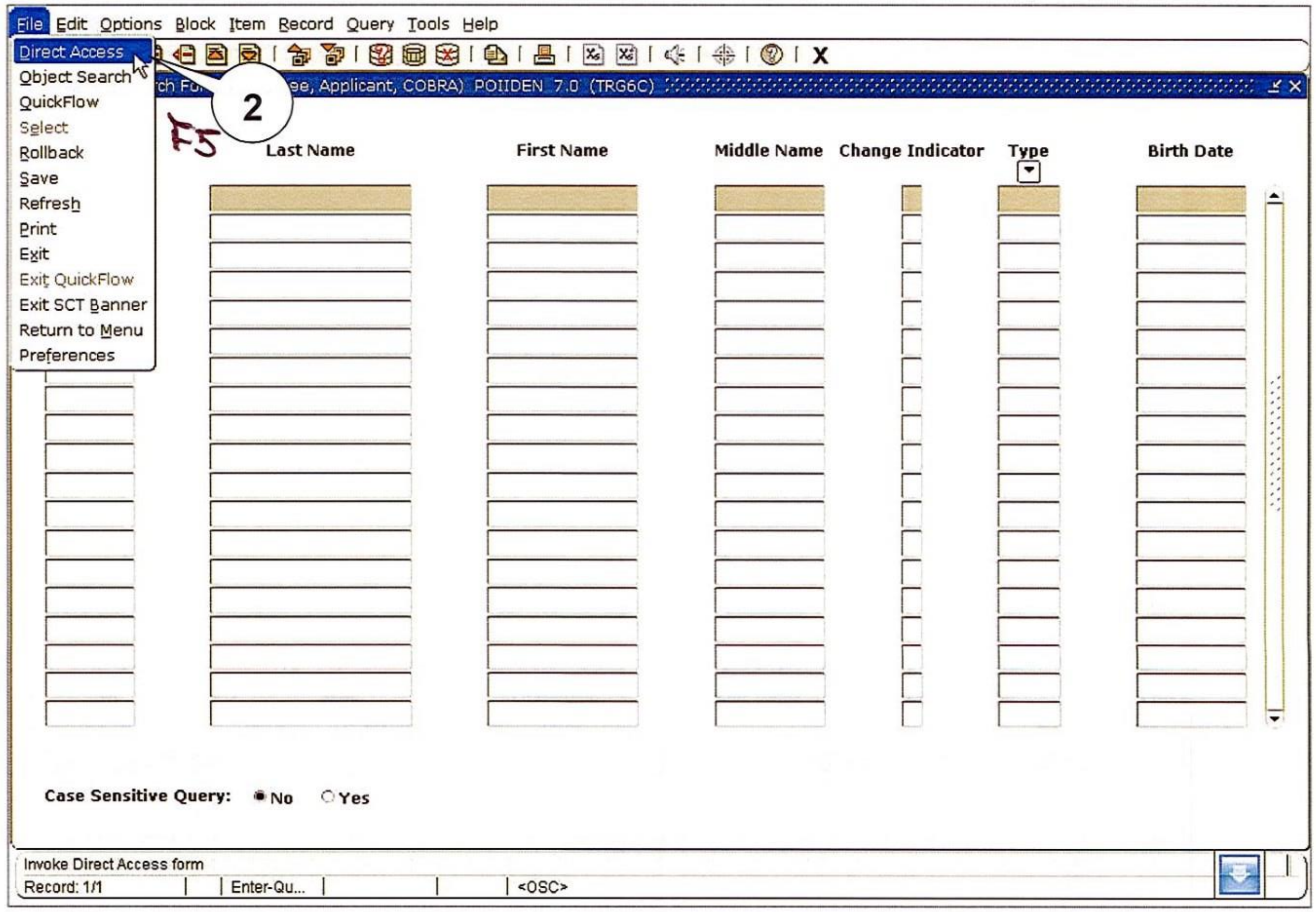
(Return to Table of Contents)

Discussion: Direct Access

1

You can also use the ***Direct Access*** method from within a form to open another form without closing the current form.

* F5 Open/close to open another form.



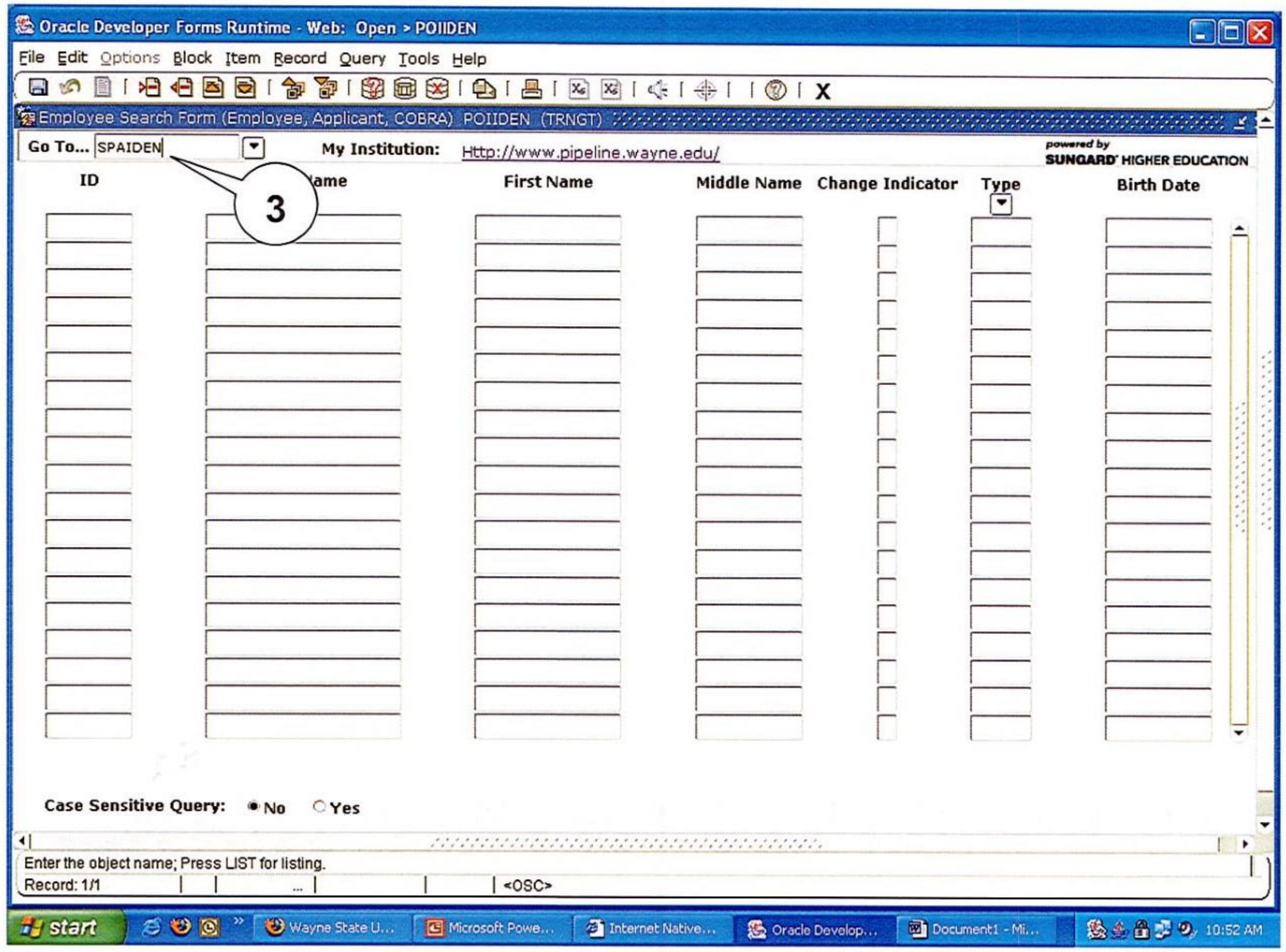
(Return to Table of Contents)

Procedure: Direct Access

Using Direct Access… :

With a Banner form open:

1) Click FILE on the menu bar
2) Click DIRECT ACCESS
3) Enter the form name
4) Press ENTER.



(Return to Table of Contents)

On Your Own Activity: Go To… and Direct Access

1) Using the **Go To…** field on the main menu, open PPAIDEN. After PPAIDEN opens…
2) From the file menu, use **Direct Access** to open SPAIDEN.

(Return to Table of Contents)

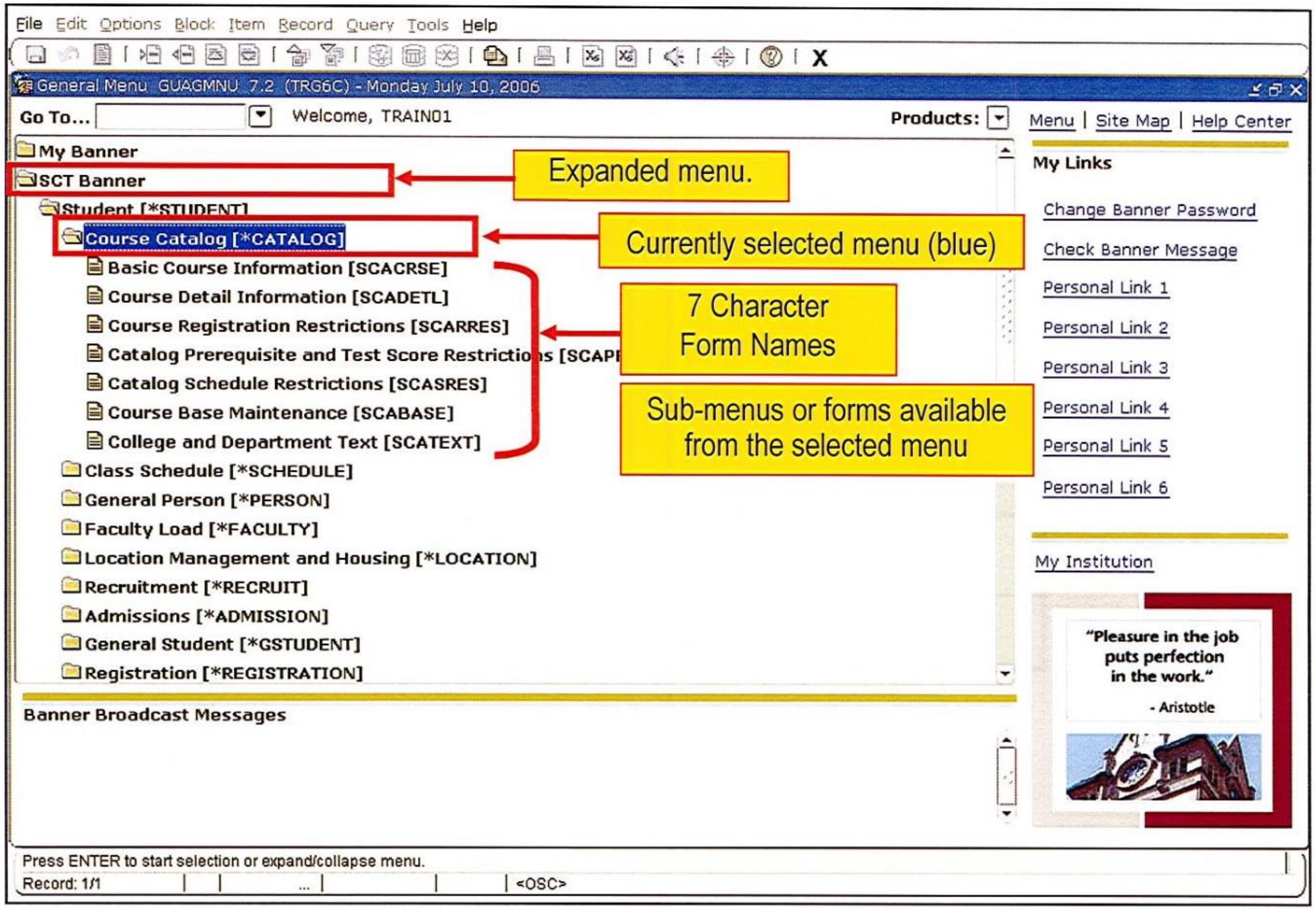
Discussion: Main Menu Access to Forms

You can also navigate to a specific form using the '*main menu.*'

You can expand and collapse menus by double-clicking the folder icons that appear to the left of the name.

If a closed folder icon appears, double-click it to expand the menu. The closed folder icon changes to an open folder icon when the menu contents are visible.

If an open folder icon appears, double-click it to collapse the menu.

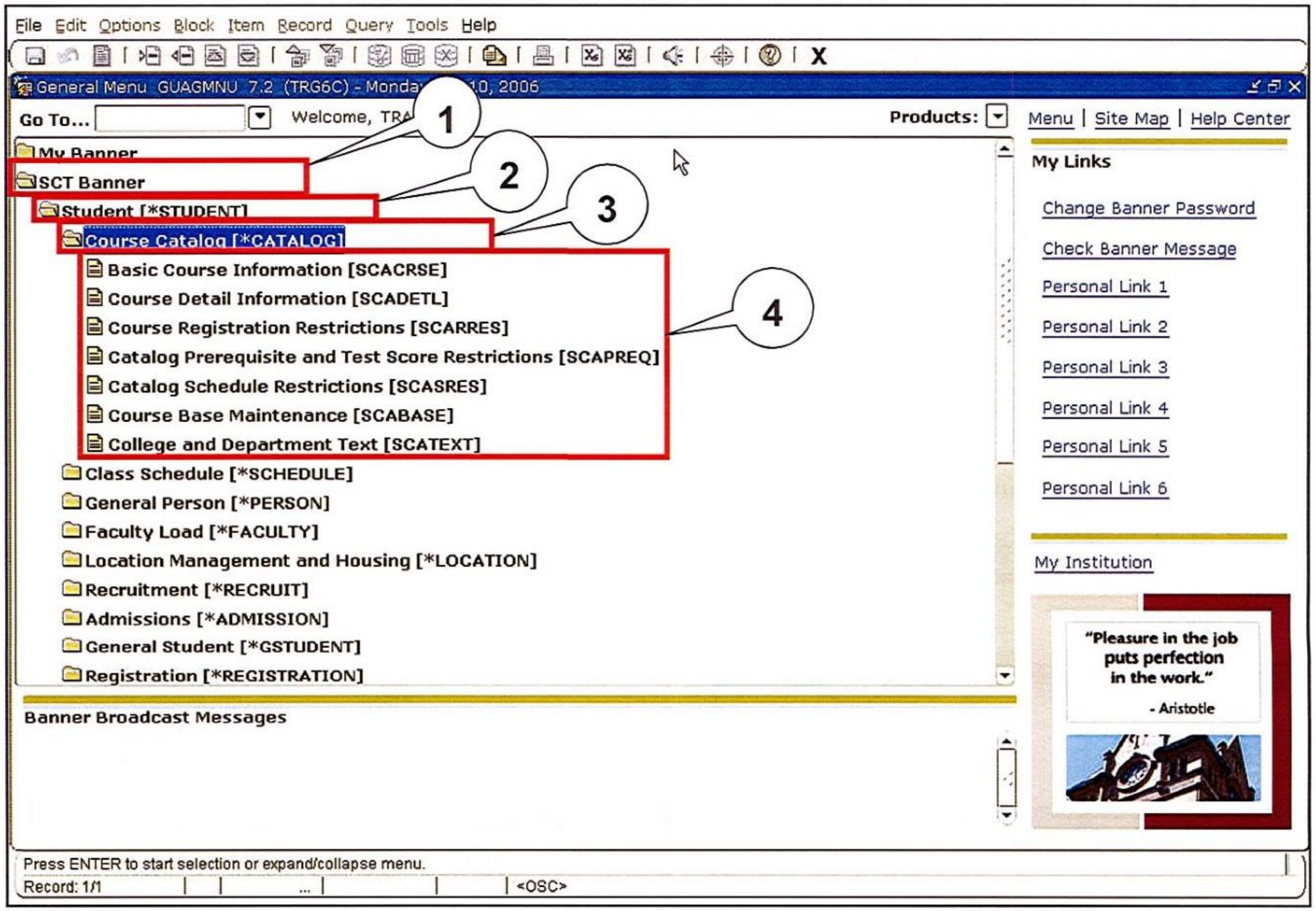


(Return to Table of Contents)

Procedure: Main Menu Access to Forms

To Expand a Menu:

1) Double-click the folder icon next to **SCT Banner**.
2) Double-click the folder icon next to **Student**.
3) Double-click the folder icon next to **Course Catalog**.
4) Select the appropriate form you wish to open from the Course Catalog menu.



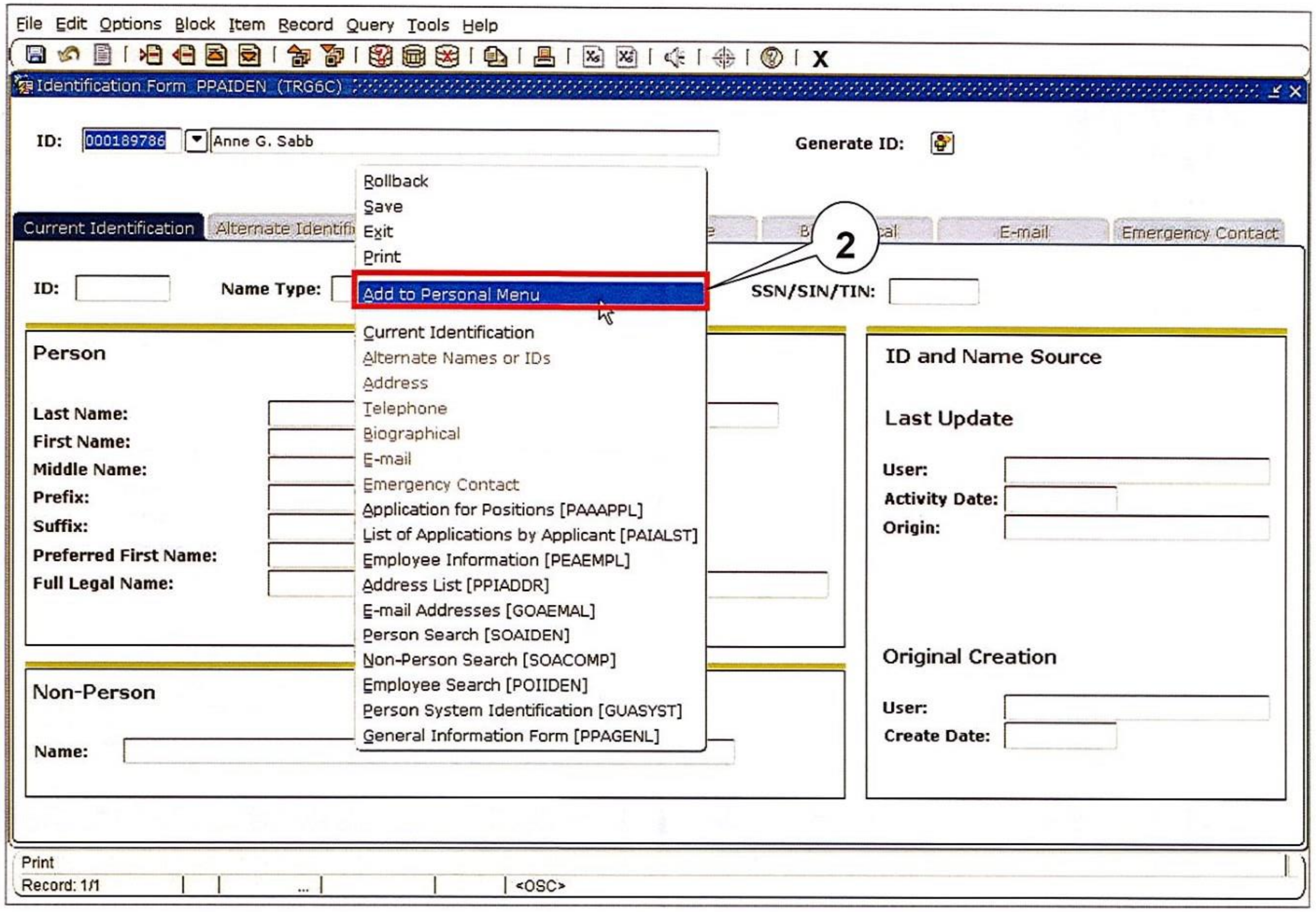
(Return to Table of Contents)

Procedure: My Banner

To add a form to My Banner :

1) Right-click your mouse from within the form you want to add to your personal menu.
2) Select **Add to Personal Menu**.

The next time you log in to Banner, the form will appear in the **My Banner** folder when you open it.



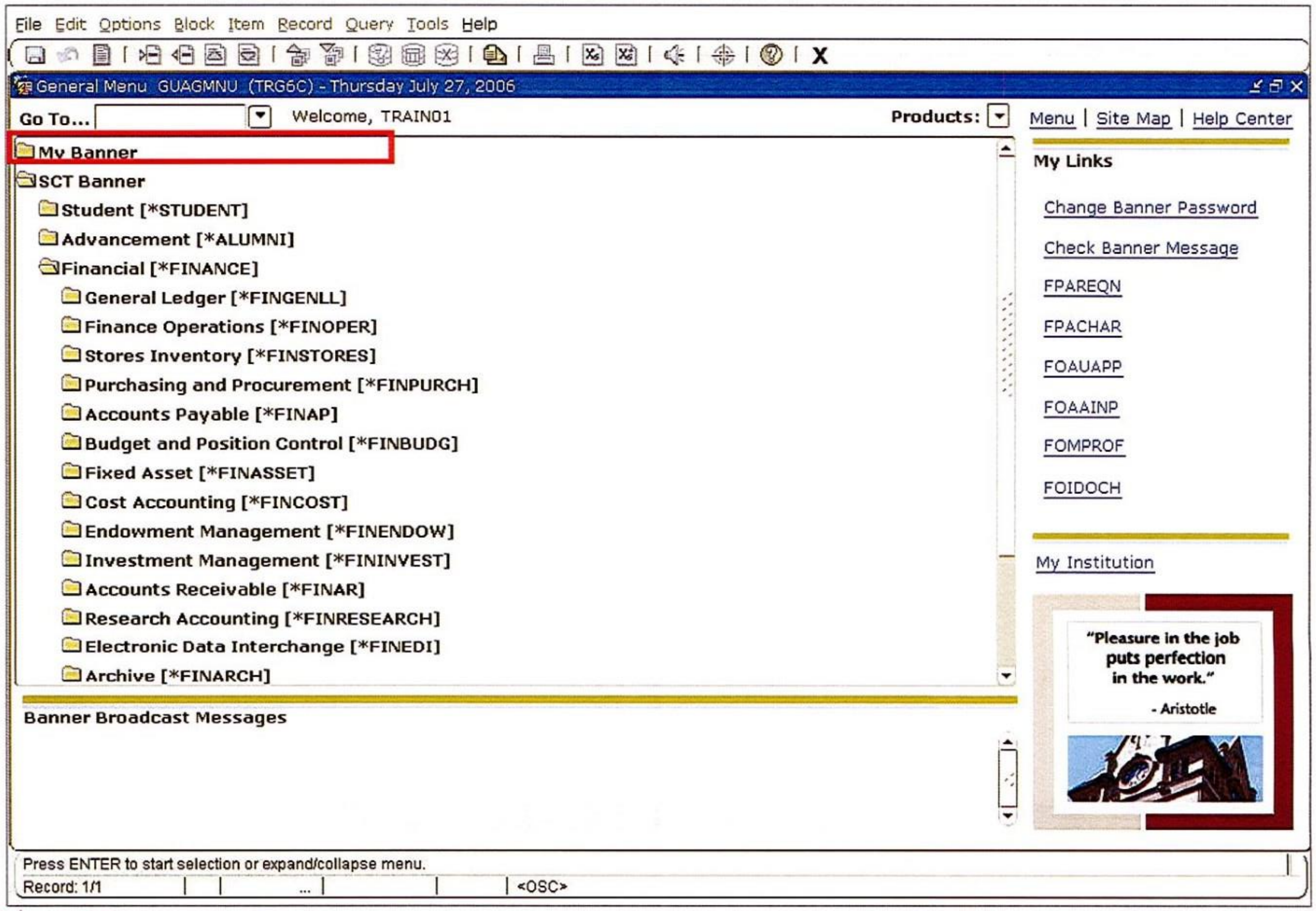
(Return to Table of Contents)

Discussion: My Banner

The **My Banner** selection on the main menu gives you the option of creating a personal menu of your most frequently used forms.

From within a form, simply right-click your mouse and select **Add to Personal Menu**.

This simple procedure will place a shortcut to the current form in the **My Banner** folder on the Main Menu.



* add to Personal menu.

* organize my banner.

Commit = TD-F

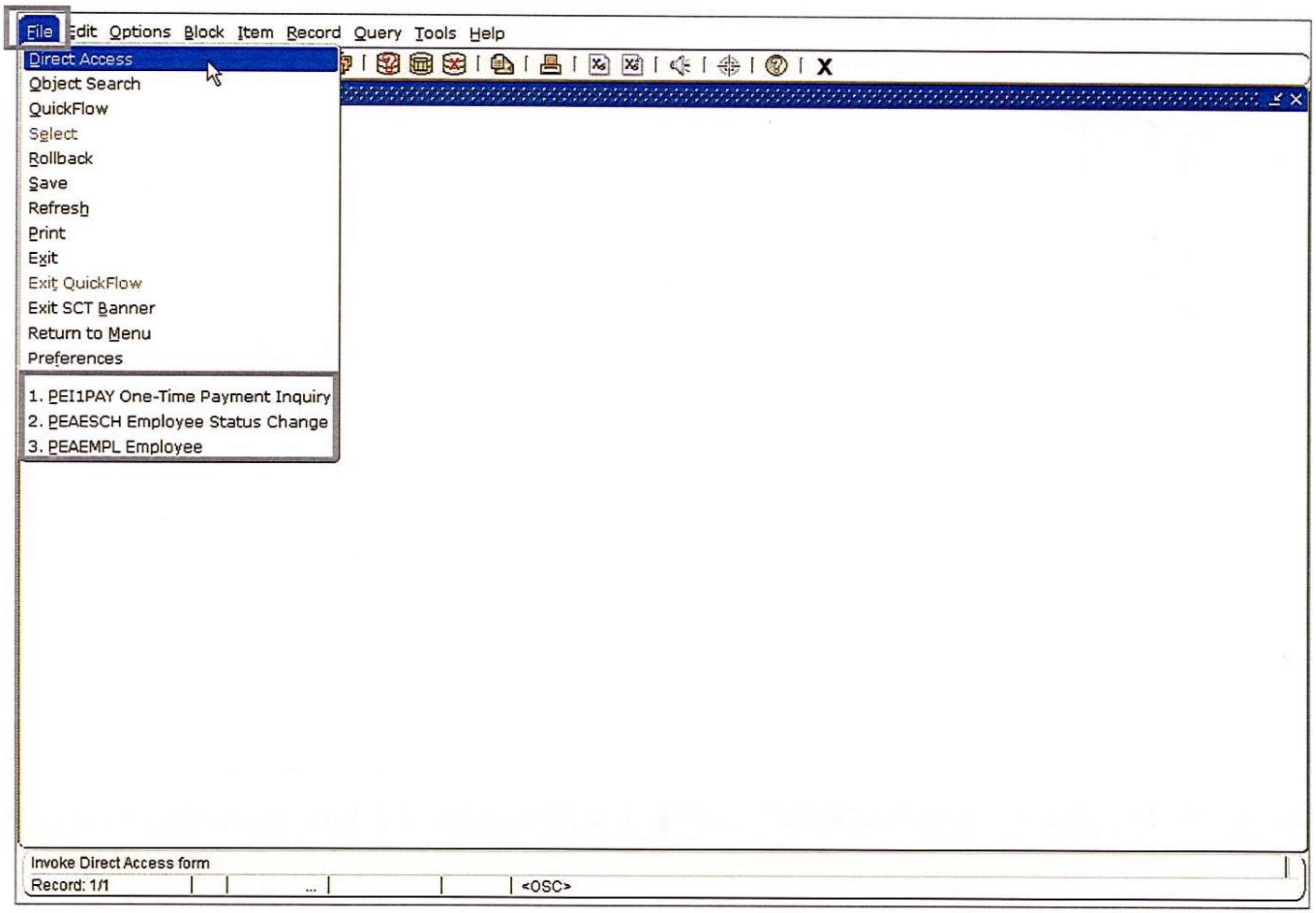
clear F8 QV
add my screens.

(Return to Table of Contents)

Discussion: Last 10 Forms Used

You can quickly *re-access* a form that was previously open in the **current** session. The bottom of the 'File' pull-down menu lists the last forms (up to 10) you have used.

- Click the File menu.
- Click the desired form.



(Return to Table of Contents)

Procedure: Last 10 Forms

Procedure:

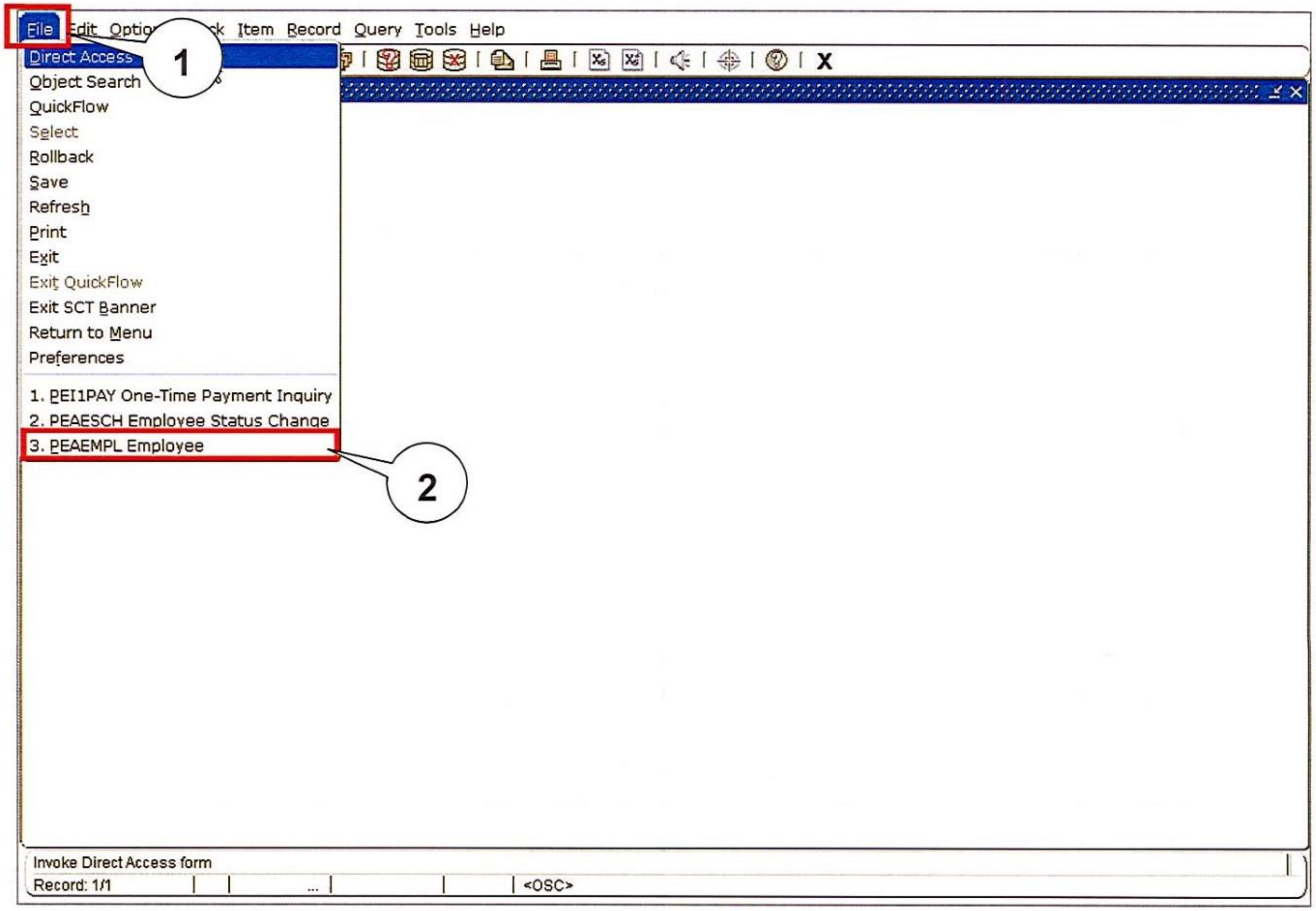
From the main menu:

1) Click the **File** menu.

2) Select the **PEAEMPL** form.

***PEAEMPL** opens*

Click Exit to return to the main menu.



(Return to Table of Contents)

On Your Own Activities: Accessing Banner Forms

Activity 1:

The five ways to access forms in Banner are:
1)
2)
3)
4)
5)

Activity 2:

For this activity, there are two parts:

A) Open Banner and access the identification form SPAIDEN using the folder icons from the main menu. (Hint: Found on the General Person Menu).

After you have successfully opened the form, click exit to return to the main screen.

B) Open the same form from the main menu, but this time use the Go To… field.

After you have successfully opened the form, click exit to return to the main screen.

(Return to Table of Contents)

Review: Banner Forms

In this lesson you:

- Learned about the way Banner form names are constructed, and how to decipher their function. (Topic 1)
- Learned some of the ways to move (or navigate) through Banner and access forms using:
  - **Go to… :** You can access a menu or form by its seven-character name. (Topic 2)
  - **Direct Access:** You can access a form by using the code/description lookup feature. (Topic 2)
  - **Main Menu:** You can select from a list of menus and forms in Banner. (Topic 2)
  - **My Banner**: You can create shortcuts to frequently used forms by adding them to your personal menu. (Topic 2)
  - **Last 10 forms in the File pull-down menu:** You can quickly re-access a form that was previously opened in the current session. (Topic 2)

(Return to Table of Contents)

Lesson 4: Performing Inquiries - Overview & Agenda

Lesson Overview

Perhaps one of the most powerful features of Banner is the ability to *search* for information.

Banner allows you to search for information using query functions.

Another way Banner allows you to search is by using forms specifically designed for performing inquiries.

Lesson Agenda

Topic 1: Query basics, wildcards

Topic 2: Perform a query using a form field

Topic 3: Perform a query using an application form

Topic 4: Perform a query using an inquiry form

Topic 5: Common forms to Query

(Return to Table of Contents)

Topic 1: Query Basics and Wildcards

Querying is the process of looking to see what information is already entered in the Banner database. You can use inquiry forms, query forms, and most application forms to perform queries.

Some forms automatically open in query mode, usually because a large number of records have been retrieved. When a form opens in query mode, **Enter Query** appears in the status line. You can immediately specify search criteria to narrow the search.

Quick Flow.
Form A
B
C.

(Return to Table of Contents)

Discussion: Wildcards In A Search

You can use the *wildcards*, " %" and "_" in defining the search criteria.

The **%** character represents any number of unspecified characters.

The "_" (underscore) character represents a single, unspecified character.

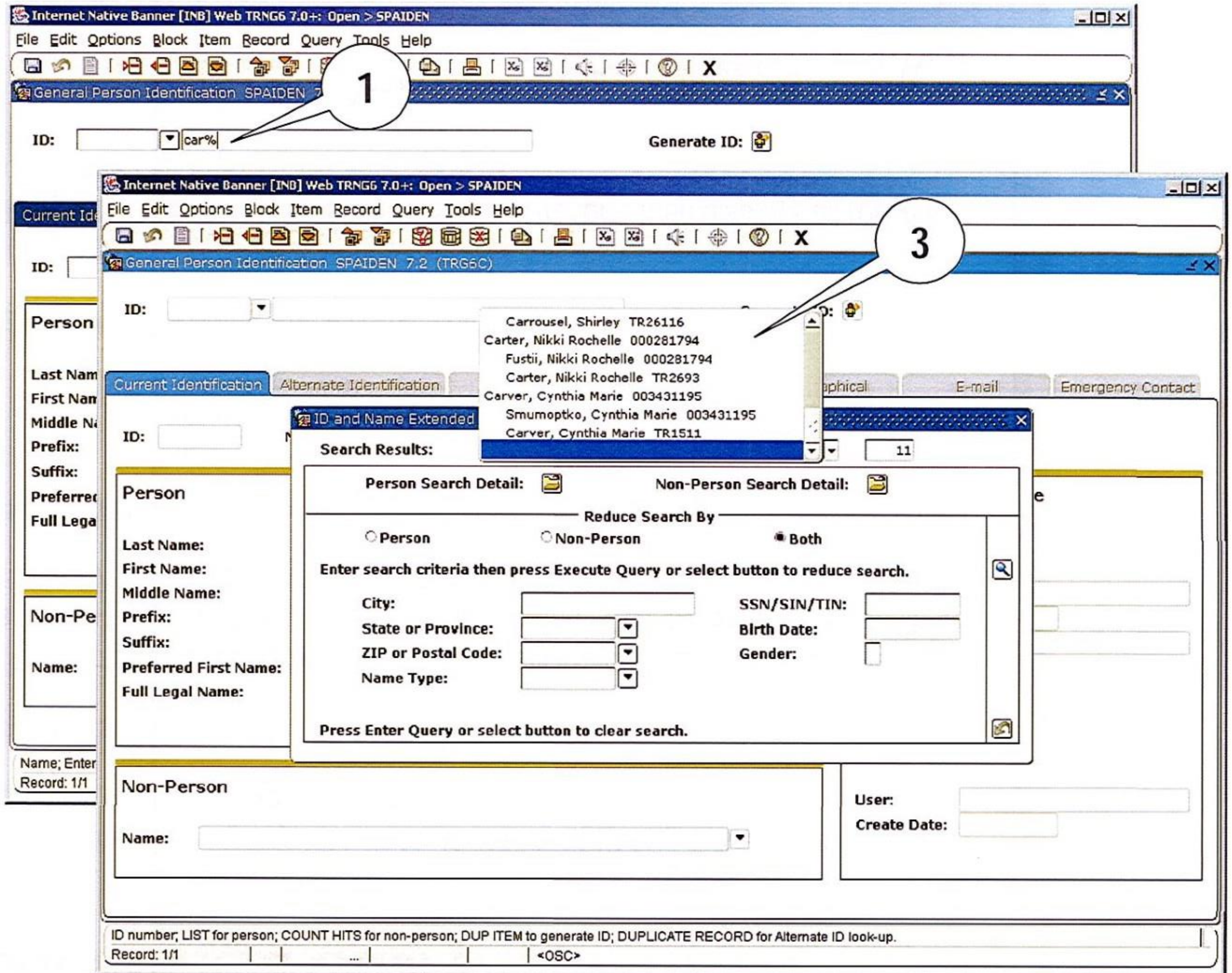
NOTE: With experience, it becomes easier to narrow your queries to get the results you want.

Examples:		
To get these results:	*Enter this criteria:*	*Sample result:*
All entries that begin with "ma"	Ma%	Marianne
All entries that have "ma" as the last two characters	%ma	Comma
All entries that contain "ma" in the name	%ma%	Superman
All entries that begin with "37," that have 3 characters	37_	377
All entries that begin with "s," but have *only* 5 characters	S_ _ _ _	Stern
All entries that have "m" as the second character	_m%	Smith

(Return to Table of Contents)

Procedure: Perform a Query from a Form Field

1. In a form field (i.e. ID, Name, etc), enter the search parameters.
2. Press the **Enter** key.
3. The number of records found (search results) is displayed.
4. Click the down arrow next to the 'Search Results' field to display the matching records.
5. Click the desired record to return it to the form.



(Return to Table of Contents)

Procedure: Performing a Query

Here are the basic steps to performing a query in Banner. These most closely illustrate the search process using either *application* or *inquiry* type forms.

1. Access the form to run the search in.
2. If the form opens in query mode (**Enter Query** is in the status line), go directly to step 3. If the form has data in the fields, it is not in query mode. In this situation, click the Enter Query toolbar button or press the F7 key to clear the content of the form.
3. Enter the search criteria. Remember, the more search criteria you enter, the more specific your search results.

Note: ***Except*** *when dealing with people, capitalization does not matter.*

4. Click the Execute Query toolbar button or press the F8 key. The form then displays all records that match the search criteria.

Human - Cap doesn't matter

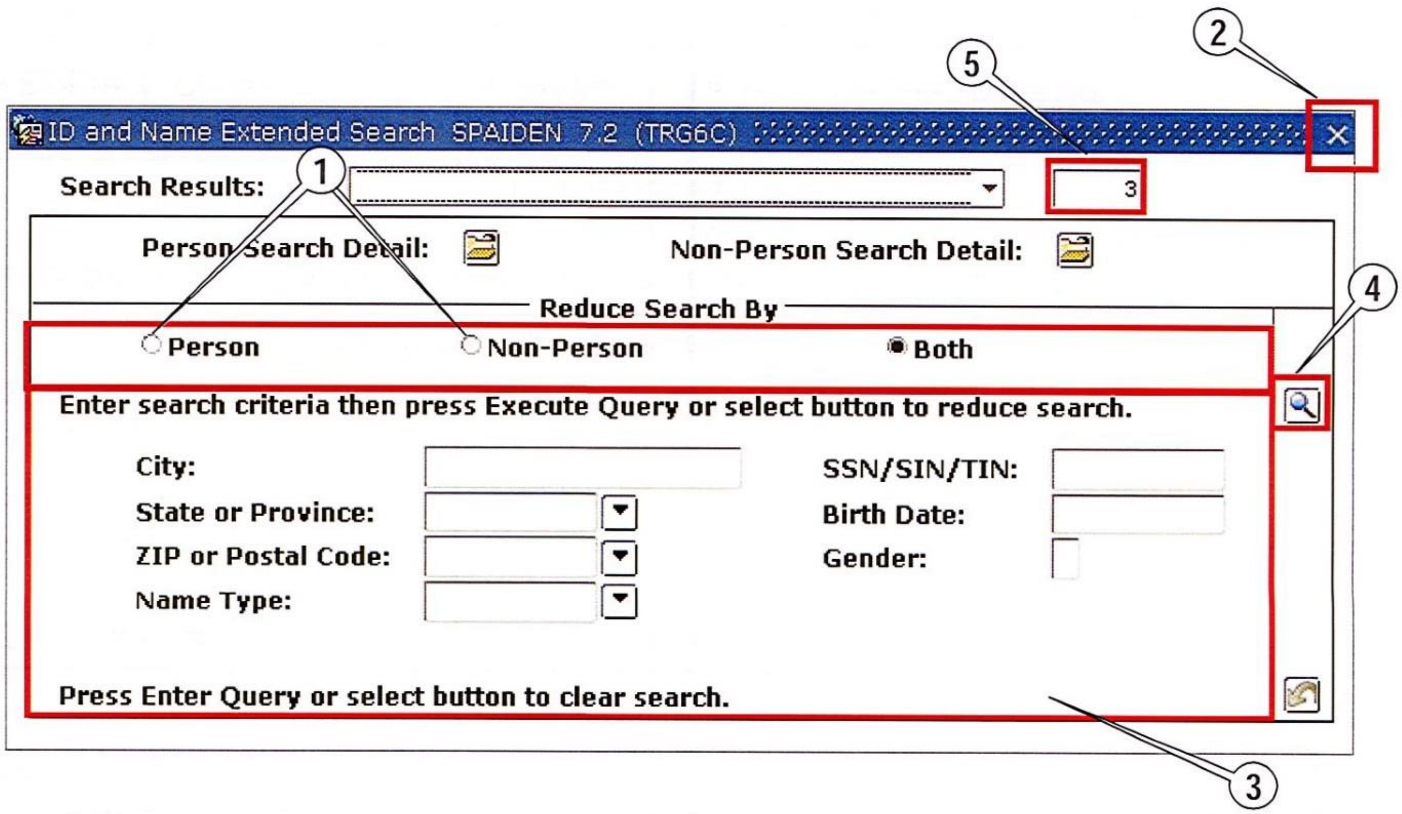
Finance - Caps matter.

(Return to Table of Contents)

Discussion: Performing a Query from a Field (cont.)

Other **options** within the pop-up search results window allows you to add more criteria if needed:

1. Confine the search to person or 'non-person.'
2. Cancel this search and return to the form.
3. Narrow the search by city, state, zip code, birth date, etc.
4. Re-run the query using additional search parameters.
5. The number of records found in the query are displayed.



(Return to Table of Contents)

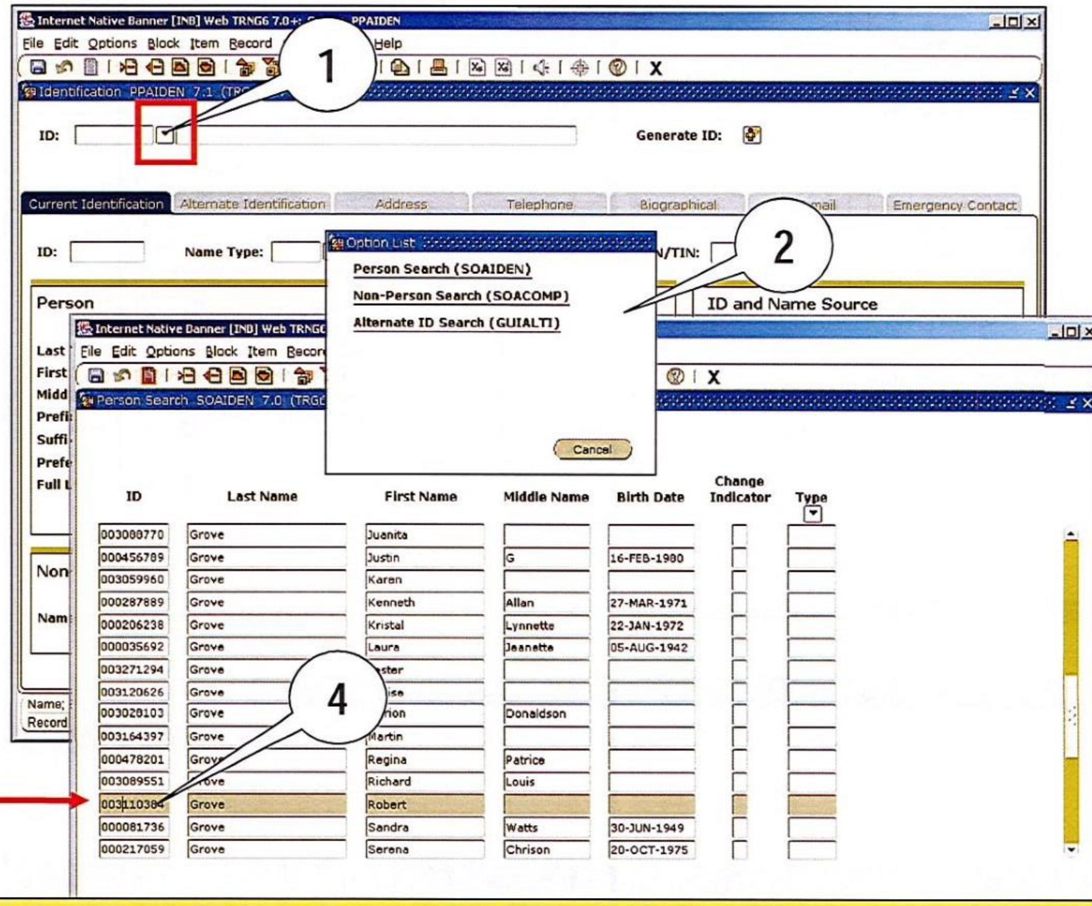
On Your Own Activity: Perform a Query from a Form Field

Steps:	Action:
1) *Open* ***PEAEMPL***	Loads the employee information form.
2) Delete any entry in the ID field, then tab to the next field.	Positions cursor in field to be searched on.
3) Type "***grov%***" (w/o quotes) in the field and press Enter to execute the query.	Displays all entries that begin with the characters "grov."
Since the Search Results window contains 90 matches, we will narrow the search again by adding an additional search parameter.	
5) In the zip code field, type ***48202*** and then *Execute Query* by pressing **F8**.	RE-executes the search, but **only** against the original matches for those who live in this area code. The number of matches appears.
6) Click the down-arrow next to the 'search results' field and select the record for Barbara A. Grover.	A single click will select and return the specific employee record back to the application form (PEAEMPL).
7) *"Next Block"* using the toolbar or Ctrl + Pg Down on the keyboard.	"Populates" the data block fields with the applicable information.

(Return to Table of Contents)

Discussion: Query Using an Application Form

1. Click the search (down arrow) button next to the field to be searched on.
2. The Options List box may appear providing links to other Banner forms that may assist with your query.
3. On the Banner form, enter in the search criteria and execute the query (F8).
4. Double-click in the ID field of the selected record to populate the original form.



*Put the A. to get the name.

(Return to Table of Contents)

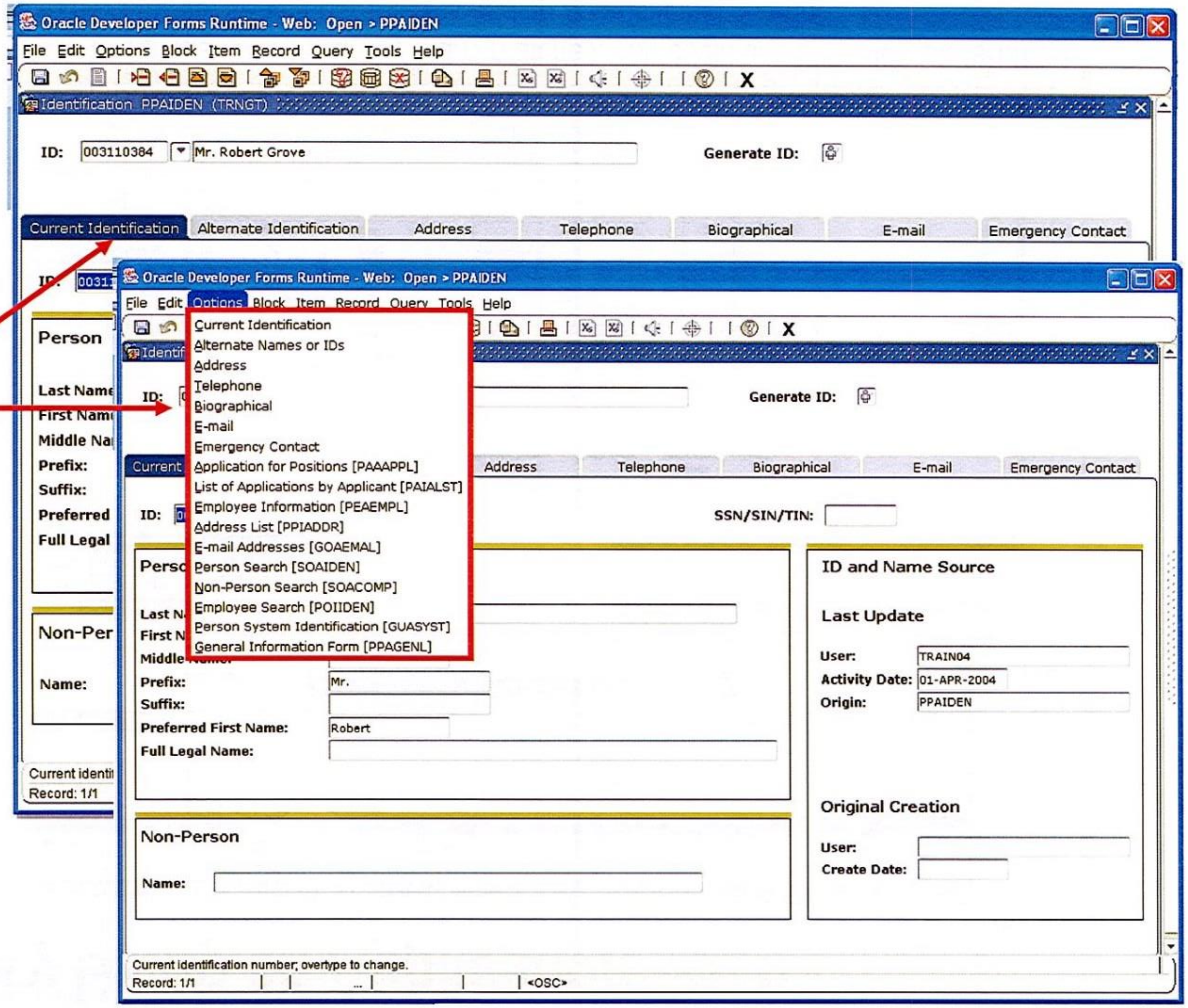
Note: If you find a query results in too many matches, you could use the **rollback (shift/F7)** function to re-enter the search parameters adding an additional criteria.

For example, adding some portion of a *first name* to supplement a query based on only *last name* data, would narrow down the results.

Discussion: Query Using an Application Form – cont.

When you select an individual's record and double click on the ID field, you are returning back to the original form when you can then access further information about that person.

Next block to populate the data fields. If additional information is needed, you can click on the navigation tabs or access other forms through the Options menu.



(Return to Table of Contents)

On Your Own: Perform a Query Using an Application Form

Steps:	Action:
1) *Open **SPAPERS*** using the **Go to…** field.	Loads the General Person form.
2) Click the search (down arrow) key next to the ID field.	The Option List dialog box appears
3) From the Option list, select **Person Search**.	Loads the SOAIDEN Person Search form.
4) Click in the last name field and enter "**des_**" (w/o quotes) as the search criteria.	To find records with 4 letters that start with "des".
5) Click *Execute Query* on the toolbar, or press F8.	Runs the search.
If you get too many matches here, press F7 to clear the screen and search again. This time, add the first name…	
6) In the last name field, re-enter "**des_**" and then tab to the first name field and enter in "**robert**" and then *Execute Query.*	Reruns the search with the added criteria.
7) Double-click the I.D. for **Robert Isaac Dess**.	**Robert Isaac Dess'** information is returned to the SPAPERS form.
8) *"Next Block"* using the toolbar or Ctrl + Pg Down on the keyboard.	*Next block* causes the data to populate the record fields.

(Return to Table of Contents)

On Your Own: Perform a Query Using an Application Form

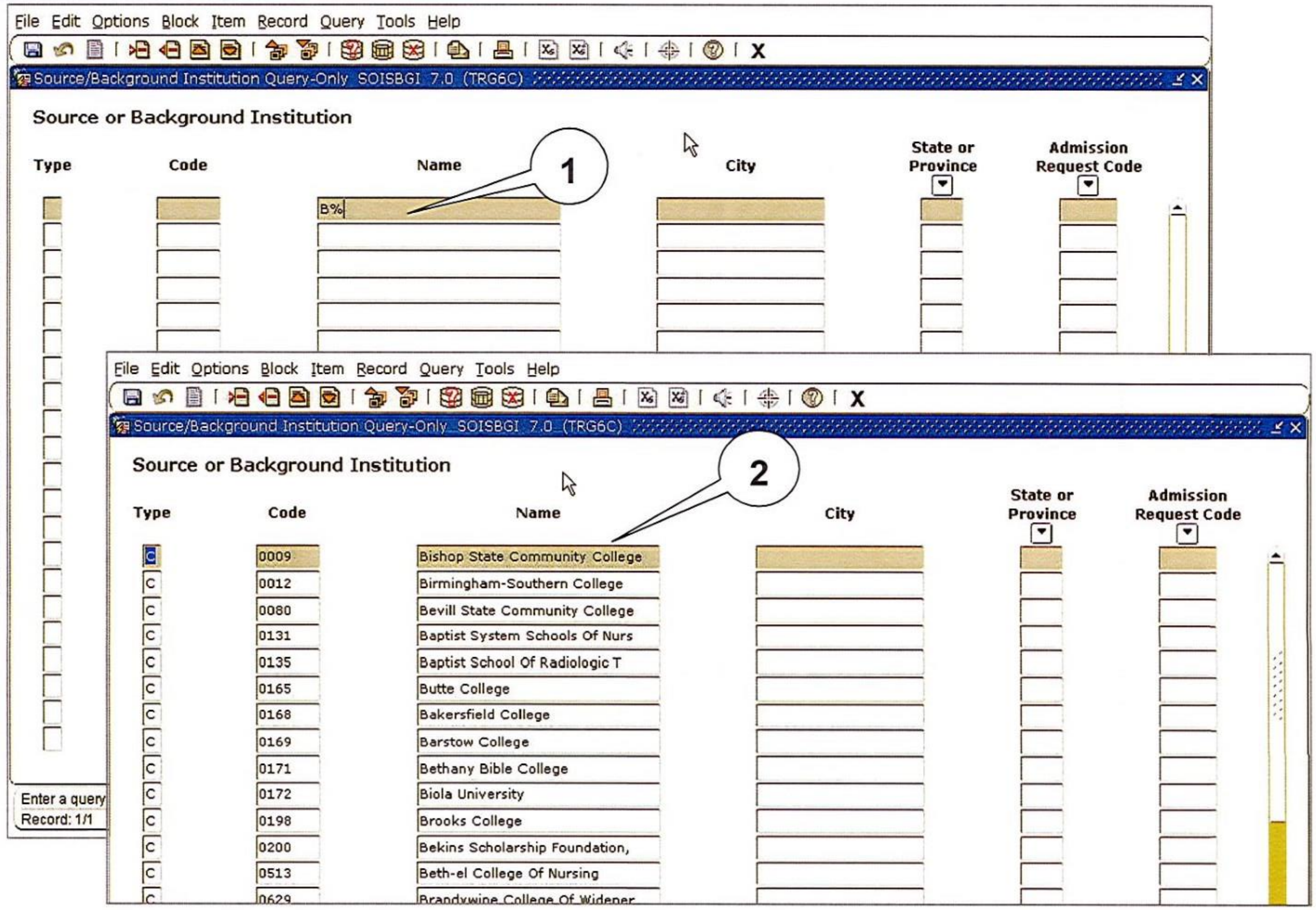
Steps:	Action:
*Open form **FTMVEND.***	The Vendor Maintenance form opens.
1) Click the search button next to the *Vendor* field.	Loads the FTIIDEN Entity Name/ID Search form.
2) Tab to the last name field and enter "East%" (w/o quotes) as the search criteria.	To find all matching records that start with "East".
3) Press **F8** or click the Execute Query button on the toolbar	The query is executed and the search results are displayed.
4) Double-click the ID # for Eastman Fire Protection, Inc.	Eastman Fire Protection information is returned to the FMTVEND form.
5) *"Next Block"* using the toolbar or Ctrl + Pg Down on the keyboard.	Next block causes the data to populate the record fields.
6) From the Options menu, select **Vendor Addresses**.	The Address tab opens, displaying the address for Eastman Fire Protection, Inc.

(Return to Table of Contents)

Discussion: Perform a Query Using an Inquiry Form

You can also use an inquiry form to search for information.

1. Launch the inquiry form you will be using and enter the criteria into a field within the form.
2. Execute the query and the results will be displayed on the form.



(Return to Table of Contents)

On Your Own Activity: Perform a Query Using an Inquiry Form

Steps:	Action:
1) Open *SOISBGI*	Loads source background institution form.
2) Tab to the **Name** field and type **J%**.	To display all institutions that begin with the uppercase letter J.
3) Click the Execute Query icon or press the F8 key.	Executes the query.
4) Ctrl+q to exit the SOISBGI form.	Returns to the main Banner screen.

NOTE: Be sure to enter search criteria with proper *capitalization!*

(Return to Table of Contents)

Banner.8 HMRS Query Forms

Topic 5: Common Forms to Query in HMRS

7-Character Form Name	Form Name	Description
PPAIDEN	Identification	▪ Name(s) ▪ Address information ▪ Basic biographic information ▪ Emergency contact information ▪ Drivers license numbers
PPAGENL	General Information	• Inquire about the educational background of an employee.
NBAPOSN	Position Definition	• Inquire on a position's salary range and/or identify where a position reports.
NBAPBUD	Position Budget	• Inquire on position budgets, premium earnings totals, fringe benefits, and position labor distributions.
PEAEMPL	Employee	• Inquire on general data, including current status, employee class, leave and benefit categories, home and distribution organizations, and service dates.
NBAJOBS	Employee Jobs	• Inquire about an employee's job description, start and end dates, status, hours, and salary information.
PPAINTL	International Information	• Inquire on an employee's I9 information.
PHICHEK	Check Detail Inquiry	• Inquire on the details of a specified pay event, including check/Direct Deposit numbers, recipient, gross and net amounts, earnings codes and rates, deductions, and hours worked during the pay period.
PEAFACT	Faculty Action Tracking	Inquire on the following eligibility/status for a specific faculty member: • Eligibility for a sabbatical • Tenure status • Reappointments or leave

(Return to Table of Contents)

Common Forms to Query in Student

7-Character Form Name	Form Name	Description
SOAIDEN	Person Search	This form may be used to determine the correct ID number for a person using the query capabilities of the system. The name, ID number, birth date, and name type are displayed.
TSAAREV	Account Detail	The Account Detail Review Form is used to enter and review charge and payment information about an account. This form presents an online view of each transaction.
SIAIQRY	Faculty/Advisor Query	The purpose of the Faculty/Advisor Query Form is to enable you to select key pieces of information about faculty members or advisors and to list those people who meet the selection criteria.
SAAADMS	Admissions Application	This form is used to identify whether a student has multiple admissions applications.
SOAHSCH	High School Information	This form is used to view information related to a high school student's academic history.
SOISBGI	Source/Background Institution	This form displays information about an institution's type, code, and location.
SHATERM	Term Sequence Course History	This form displays the student's current status and GPA information. Scrolling institutional, transfer, and overall GPA totals are displayed on this form each time the term changes.
SHADEGR	Degree and other Formal Awards	This form is used to review all information pertaining to degrees or other types of awards that the student is seeking, or has been awarded.
SOAHOLD	Holds	This form is used to display holds a person may have.

(Return to Table of Contents)

Common Forms to Query in FMS

7-Character Name	Form Name	Description
FPIREQN	Requisition Inquiry	• Inquire on the details of a completed requisition.
FGIENCD (replaces screen 021)	Detail Encumbrance Activity	• Inquire on a specific encumbrance number posted to the system. • Provides data on all transactions posted against the specific encumbrance.
FGITRND (replaces screen 023 & 27)	Detail Transaction Activity	• Inquire on detail transactions for specific FOAPAL elements. • Inquire by specific fiscal year. • Inquire on specific document information.
FGIJVCD	List of Suspended Journal Vouchers	• Inquire on those JVs that are approved, but are pending in the posting process.
FTMFUND	Fund Code Maintenance	• Inquire on fund effective date; Inquire on fund/grant relationship; Inquire on fund roll-ups.
FTMACCT	Account Code Maintenance	• Inquire on FMS account codes.
FWMACCT	WSU Account Code Crosswalk Maintenance	• Inquire on the new FMS account codes by entering the old FRS object codes.
FGIOENC (replaces screen 021)	Organization Encumbrance List	• Inquire on the open encumbrances for a specific index, organization, and/or fund.
FGITBSR (replaces screen 018)	Trail Balance Summary	• Inquire on general ledger trial balance activity at the summary level. • Inquire by fund and/or account code and fiscal year. • Inquire on fund balance.
FGIBDST Replaces screen 019)	Organization Budget Status Form	• Inquire on budget availability by Org., Fund, Program, Account Code, Account type. • Inquire on adjusted budget, YTD actual expenses incurred, commitments, and available balance. • Inquire on detail transactions for actual YTED activity or by encumbrances. • Inquire by specific fiscal year.
FGIBDSR	Executive Summary Form	• Inquire on budget availabiitly by specific FOAPAL elements at the highest summary level. • Inquire by index and fiscal year; Inquire by detail description.
FOIDOCH	Document History	• Inquire on all aspects of a purchase requisition.

(Return to Table of Contents)

Review: Performing Inquiries

In this lesson you:

- Defined what a query/inquiry is (Topic 1)
- Defined available search 'wildcard' options (Topic 1)
- Performed a query from a form field (Topic 2)
- Performed a query using an application form (Topic 3)
- Performed a query using an inquiry form (Topic 4)
- Reviewed a list of commonly used query forms (Topic 5)

(Return to Table of Contents)

Lesson 5: Understanding FOAPAL – Overview

The FOAPAL string of codes is the core of the Banner Financial Management System (FMS). FOAPAL is the hierarchy coding system FMS uses for classification, budgeting, and recording. It also gives users the ability of reporting and making inquiries at multiple levels.

Virtually every task in FMS will require the use of the FOAPAL string of codes in some form or another. Understanding the concept of FOAPAL is essential for you to work successfully in FMS.

In the next few pages you will learn what role it plays in your dealings with FMS:

What you will learn in this lesson:

Topic 1. Define and identify FOAPAL string and elements

Topic 2. Identify Index codes

(Return to Table of Contents)

Discussion: Definition of FOAPAL

Definition of FOAPAL:

The FOAPAL "string" is used to convey important accounting information specific to a financial transaction or labor costs. This assembly of various accounting codes is established and maintained by WSU Fiscal Operations.

Virtually every task and every form within FMS will require the use of the full FOAPAL string of codes. The use of the FOAPAL string also gives you the ability to report and make inquiries at multiple levels.

Here is an example of a FOAPAL string of codes as used in FMS:

COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn
W	153381	111560	25A	72161	45		

(Return to Table of Contents)

Discussion: FOAPAL string of codes—What does it stand for?

Routing Code (Labor, Purchase)

Important WSU Codes:

- **Chart of Accounts (COA)** is a systematic classification of accounts. **WSU uses only one COA:** ***W.***
- **Index** is a six character code that serves as a *shortcut* to many of the FOAPAL string combinations.
- **Fund** identifies the source from which the money is being drawn.
- **Organization (Orgn)** identifies the budget unit of the school, college, division, or department that is processing the transaction. Examples: Dean of Libraries, Center for Urban Studies, College of Engineering.
- **Account Code (Acct)** identifies what financial activity is being recorded. Examples: assets, liabilities, fund balance, revenues, expenditures, transfer.
- **Program (Prog)** identifies the purpose of the transaction. Examples: instruction, academic support, research
- **Actv** = **Activity** is not currently used at WSU.
- **Locn** = **Location** is used only for plant funds.

Note: To create a FOAPAL, you need two pieces of information, the index code and account code.

insert index

Labor Purchase

Everything Else Populate

COA		F	O	A	P	A	L
COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn
W	153381	111560	25A	72161	45		

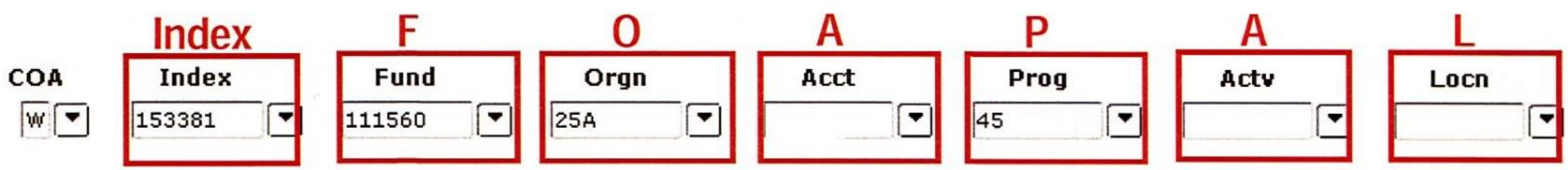
(Return to Table of Contents)

Discussion: Identify Index Codes

The **Index Code** is a six-character code that serves as a shortcut to completing a FOAPAL string.

As you can see from the example below, entering the *153381* code into the index field will populate all FOAPAL element fields **except for the Account Code.**

When using Index Codes, you **must always** provide the FMS Account Code yourself.



(Return to Table of Contents)

Review: Understanding FOAPAL

In this Lesson you learned:

- The definition of FOAPAL and identifying FOAPAL string
- How to identify index codes

(Return to Table of Contents)

Lesson 6: Features In Banner - Agenda

Lesson Overview

Banner is equipped with many convenient features such as *calendar* and *calculator* functions.

As you become more proficient working with Banner, you'll find these features and others very useful.

Lesson Agenda

Topic 1: Use the Calculator and Calendar

Topic 2: Change your Banner password

(Return to Table of Contents)

Topic 1: Use the Calculator and Calendar

Banner's **Calculator** and **Calendar** functions are conveniently *connected* to related fields within every Banner form. A double-click within a field for either a date or numeric type data will activate the associated calculator or calendar tool.

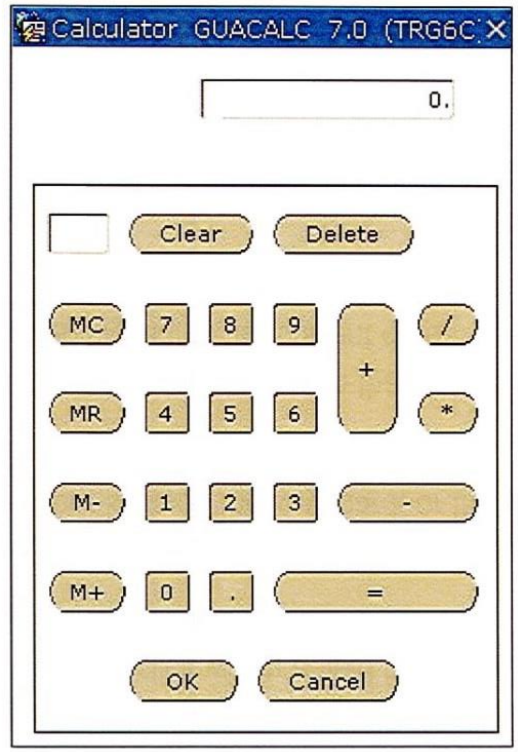
- If the form's *numeric* field has a value, the calculator starts with that value. You can then use the mouse, number keys on the keyboard, or the numeric keypad (if the Num Lock is enabled) to make calculations.
- If the *date* field has a value, the calendar starts with that date highlighted. If the date field is empty, the calendar highlights the current date.

(Return to Table of Contents)

Discussion: Use The Calculator

If you access the calculator by double-clicking in a numeric form field, clicking the OK button will **return** the calculated value to the 'calling form.'

You can also access the calculator via the Go to… field by entering **GUACALC.** When accessed this way, the calculator works *independently* of any form or field and you *cannot* return a calculated value to a form.



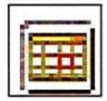
Double click on Date field.

(Return to Table of Contents)

Discussion: Use the Calendar

Accessing the calendar via the calendar icon next to a date field allows you to click the desired date to return that value to the 'calling form.'

You can also access the calendar with the Go to... field by entering **GUACALN**. When accessed this way, the calendar works independently of any form or field. This means you *cannot* select a date and return it to a form.



(Return to Table of Contents)

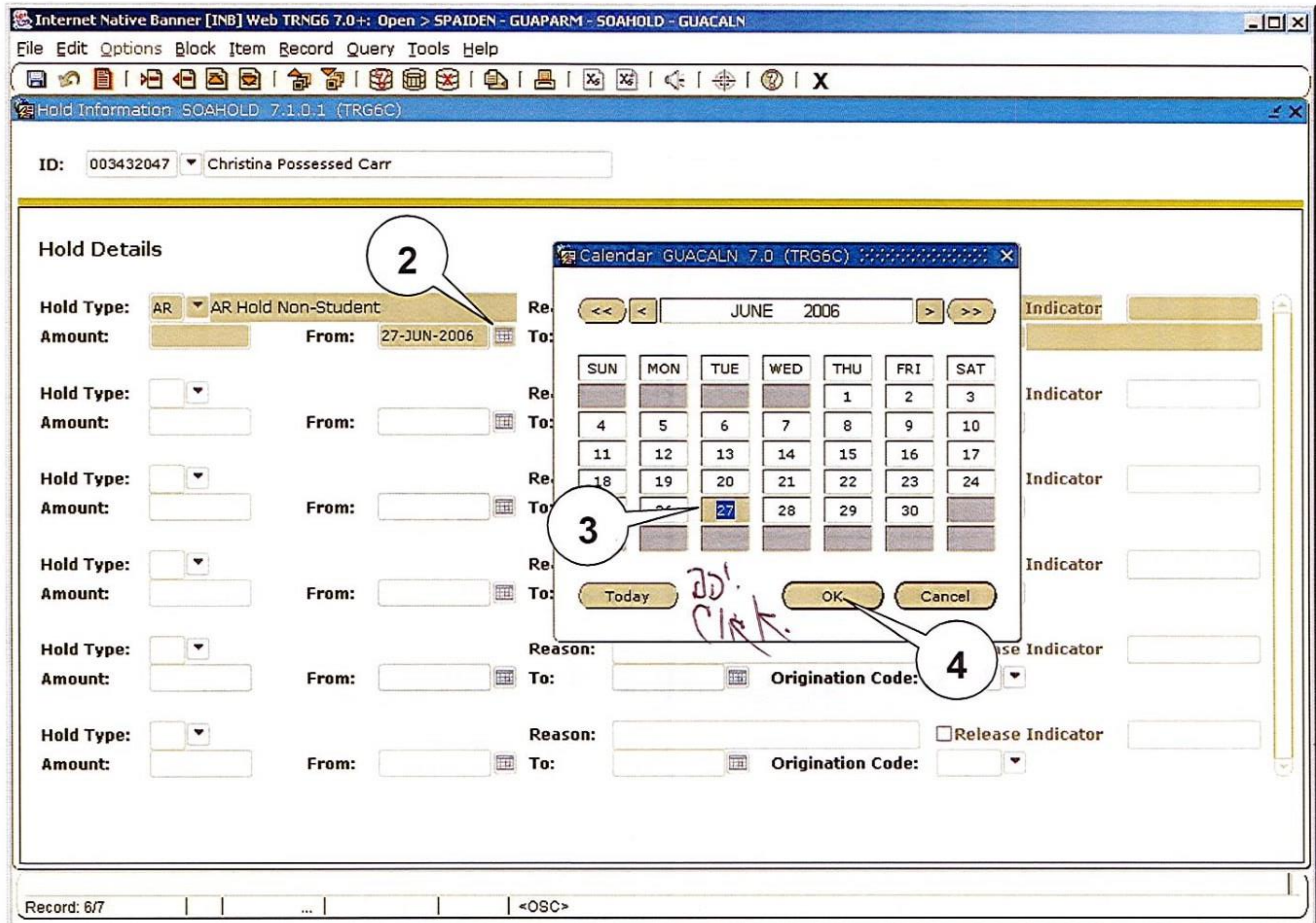
Procedure: Use the Calendar

Procedure:

In a Banner form:

1. Place the cursor in a From field.
2. Click the calendar icon next to the From field.
3. Select a date.
4. Click OK to populate the date field on the form with the selected date.

Here we've used the **SOAHOLD** form to illustrate these steps.



(Return to Table of Contents)

On Your Own Activity: Use the Calendar

Steps:	Action:
1) Open *SPAIDEN.*	The form opens.
2) Block Next / Ctrl + Pg Down.	Moves cursor to next block, and populates data fields.
3) Click the Addresses *link* on the Options Menu.	Opens the addresses screen.
4) Click the calendar icon next to the "From" field.	The calendar appears.
5) Select a date of your choice.	The date is highlighted. **Note: Clicking the desired date automatically returns that date to the form field.**
6) Click the **OK** button	The date selected returns to the From date field.

(Return to Table of Contents)

Topic 2: Change Banner Password

There are a number of reasons why you might want to change your Banner password, so here's the procedure to use.

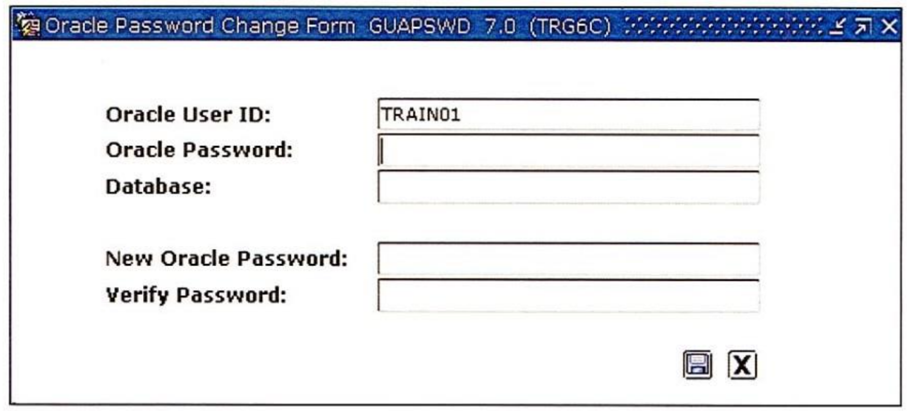
NOTE: You can make your Banner (Oracle) password the same as the password you use for WSU e-mail, as long as it does not start with a number.

(Return to Table of Contents)

Procedure: Change Banner Password

Procedure:

1) Click **Change Banner Password** under **My Links** on the Main Menu.
2) The Oracle Password Change Form appears. Here, type your current password in the "Oracle password" field.
3) Type a *NEW password in the "New Oracle Password" field*.
4) Tab to "verify password" field and re-type your new password.
5) Click Save or press the enter/return key.



*__NOTE:__ Do __NOT__ start your new password with a __number__ or __special character!__ If you do, the system will not respond and will not even display an *error* message.

(Return to Table of Contents)

Review: Features in Banner

In this lesson you learned how to do the following:

- Use the calculator function of Banner (Topic 1)
- Use the calendar function of Banner (Topic 1)
- Change your Banner user password (Topic 2)

(Return to Table of Contents)

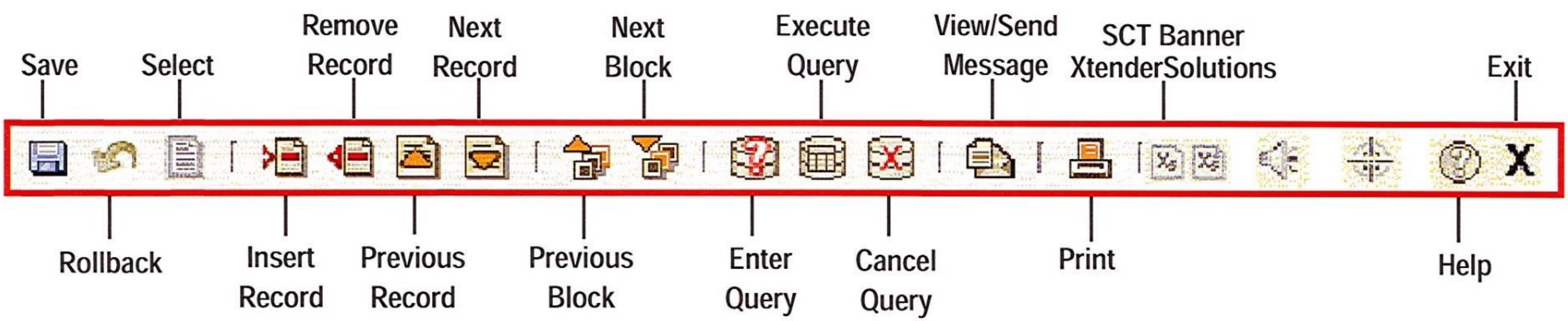
Appendix – Session Key Points

We have compiled some of the key information from this session for quick reference:

- Toolbar buttons reference chart
- Keyboard Shortcuts chart
- Form name basics
- Most commonly used *inquiry* forms

(Return to Table of Contents)

Topic 1: Parts of the Interface



Tool Tips provide the name of the button the mouse cursor is pointing at.

(Return to Table of Contents)

Topic 2: Keyboard Shortcuts

<table>
<tr><th>Keys</th><th>Description</th></tr>
<tr><td>Ctrl F1</td><td>Display “Show Keys” window</td></tr>
<tr><td>F2 | shift + F2</td><td>-- | count query hits</td></tr>
<tr><td>F3 | shift + F3</td><td>-- | SELECT record</td></tr>
<tr><td>F4 | shift + F4</td><td>Record duplicate |</td></tr>
<tr><td>F5 | shift + F5</td><td>-- | Clear block</td></tr>
<tr><td>F6 | shift + F6</td><td>Insert record | Delete record</td></tr>
<tr><td>*F7 | shift + F7</td><td>Enter query | Rollback</td></tr>
<tr><td>*F8 | shift + F8</td><td>Execute query | print</td></tr>
<tr><td>F9</td><td>List – Search</td></tr>
<tr><td>F10</td><td>Save changes</td></tr>
<tr><td>*Ctrl + pg ↓</td><td>Next block</td></tr>
<tr><td>*Ctrl + pg ↑</td><td>Previous block</td></tr>
<tr><td>Ctrl + u</td><td>Clear item field</td></tr>
<tr><td>*Tab</td><td>Next item field</td></tr>
<tr><td>Shift Tab</td><td>Previous item field (reverse direction)</td></tr>
<tr><td>Ctrl + q</td><td>Acts as ‘exit’ button – cancels a query or exits current form</td></tr>
</table>

Here’s a collection of some of the most useful keyboard shortcuts.

NOTE: *Data entry* users will make good use of these “permission-based” shortcuts:

- F4 Duplicate record
- F6 Insert record
- Shift/F6 Delete record
- F10 Save record

(Return to Table of Contents)

Topic 3: Understanding Form Names

Position 1:
Identifies the **primary system** owning the form

Position 2:
Identifies the **business process** (module) owning the form

Position 3:
Identifies the form **type**

Position 4-7:
Uniquely **identifies** the form

P	P	A	IDEN
1	2	3	4-7
• Accounting (T) • HR/Payroll / Personnel (P) • Position Control (N) • Student (S) • Financial (F)	• General Person (P) • Application (A) • Budget (B) • COBRA (C) • Benefit/Deductions (D) • Employee (E) • Electronic Approvals (R) • "Overall" to a business process (O) • General to a business process (G) • Purchasing (P)	• Application (A) • Inquiry (I) • Validation (V) • Maintenance (M)	• Identification (IDEN) • Position (POSN) • Encumbrance (ENCB) • Employee (EMPL) • Job information (JOBS) • Requisition (REQN) • Check (CHEK).

(Return to Table of Contents)

Topic 4: Common Forms to Query in HRMS

7-Character Form Name	Form Name	Description
PPAIDEN	Identification	▪ Name(s) ▪ Address information ▪ Basic biographic information ▪ Emergency contact information ▪ Drivers license numbers
PPAGENL	General Information	• Inquire about the educational background of an employee
NBAPOSN	Position Definition	• Inquire on a position's salary range and/or identify where a position reports
NBAPBUD	Position Budget	• Inquire on position budgets, premium earnings totals, fringe benefits, and position labor distributions.
PEAEMPL	Employee	• Inquire on general data, including current status, employee class, leave and benefit categories, home and distribution organizations, and service dates.
NBAJOBS	Employee Jobs	• Inquire about an employee's job description, start and end dates, status, hours, and salary information.
PPAINTL	International Information	• Inquire on an employee's I9 information
PEAFACT	Faculty Action Tracking	Inquire on the following eligibility/status for a specific faculty member: • Eligibility for a sabbatical • Tenure status • Reappointments or leave

(Return to Table of Contents)

Topic 4: Common Forms to Query in Student

7-Character Form Name	Form Name	Description
SOAIDEN	Person Search	This form may be used to determine the correct ID number for a person using the query capabilities of the system. The name, ID number, birth date, and name type are displayed.
TSAAREV	Account Detail	The Account Detail Review Form is used to enter and review charge and payment information about an account. This form presents an online view of each transaction.
SIAIQRY	Faculty/Advisor Query	The purpose of the Faculty/Advisor Query Form is to enable you to select key pieces of information about faculty members or advisors and to list those people who meet the selection criteria.
SAAADMS	Admissions Application	This form is used to identify whether a student has multiple admissions applications.
SOAHSCH	High School Information	This form is used to view information related to a high school student's academic history.
SOISBGI	Source/Background Institution	This form displays information about an institution's type, code, and location.
SHATERM	Term Sequence Course History	This form displays the student's current status and GPA information. Scrolling institutional, transfer, and overall GPA totals are displayed on this form each time the term changes.
SHADEGR	Degree and other Formal Awards	This form is used to review all information pertaining to degrees or other types of awards that the student is seeking, or has been awarded.
SOAHOLD	Holds	This form is used to display holds a person may have.

(Return to Table of Contents)

Topic 4: Common Forms to Query in FMS

7-Character Name	Form Name	Description
FPIREQN	Requisition Inquiry	• Inquire on the details of a completed requisition
FGIENCD (replaces screen 021)	Detail Encumbrance Activity	• Inquire on a specific encumbrance number posted to the system • Provides data on all transactions posted against the specific encumbrance
FGITRND (replaces screen 023 & 27)	Detail Transaction Activity	• Inquire on detail transactions for specific FOAPAL elements • Inquire by specific fiscal year • Inquire on specific document information
FGIJVCD	List of Suspended Journal Vouchers	• Inquire on those JVs that are approved, but are pending in the posting process
FTMFUND	Fund Code Maintenance	• Inquire on fund effective date; Inquire on fund/grant relationship; Inquire on fund roll-ups
FTMACCT	Account Code Maintenance	• Inquire on FMS account codes
FWMACCT	WSU Account Code Crosswalk Maintenance	• Inquire on the new FMS account codes by entering the old FRS object codes
FGIOENC (replaces screen 021)	Organization Encumbrance List	• Inquire on the open encumbrances for a specific index, organization, and/or fund
FGITBSR (replaces screen 018)	Trail Balance Summary	• Inquire on general ledger trial balance activity at the summary level • Inquire by fund and/or account code and fiscal year • Inquire on fund balance
FGIBDST Replaces screen 019)	Organization Budget Status Form	• Inquire on budget availability by Org., Fund, Program, Account Code, Account type. • Inquire on adjusted budget, YTD actual expenses incurred, commitments, and available balance. • Inquire on detail transactions for actual YTED activity or by encumbrances. • Inquire by specific fiscal year.
FGIBDSR	Executive Summary Form	• Inquire on budget availabiitly by specific FOAPAL elements at the highest summary level. • Inquire by index and fiscal year; Inquire by detail description
FOIDOCH	Document History	• Inquire on all aspects of a purchase requisition.

(Return to Table of Contents)

Congratulations!

You should now be able to perform the following:

- Navigate in Banner
- Execute basic Banner inquiries

With these skills you will be able to use Banner efficiently and effectively. While these skills are fresh in your memory, be sure to apply them as soon as possible when back at your computer.

We have created a training version of Banner which will allow you to use these skills right away. This training version is Banner V7.x Sandbox as found at:

http://bantest.wayne.edu

Feel free to perform whatever functions you wish in this training version. You cannot harm any data while working in the "sandbox," so jump in!

Thank you for all your effort and time!

Reminder!
Sandbox username = train01 or train99
Sandbox password = Change

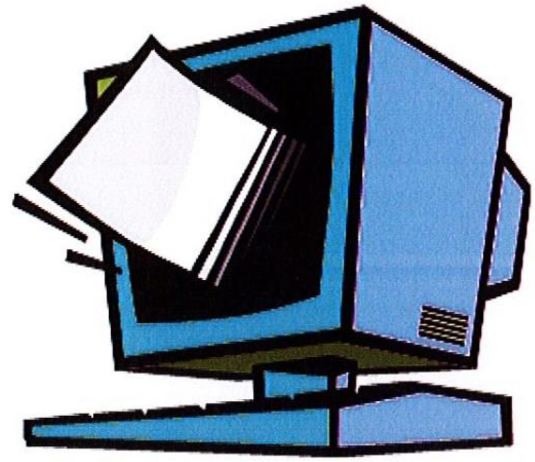
(Return to Table of Contents)

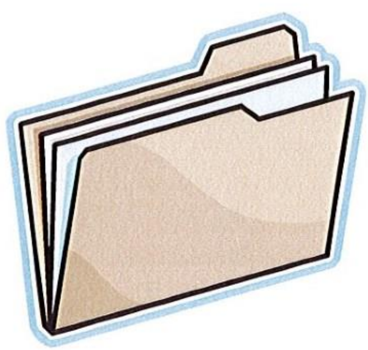
AppXtender

WAYNE STATE UNIVERSITY

APPLICATION XTENDER

WEB ACCESS





FOR DOCUMENT STORAGE AND MANAGEMENT

Contents

Introduction 5
Objective 1: Describe Application Xtender 7
Topic 1: Define Application Xtender 7
Topic 2: EPAF and ApplicationXtender Process Overview 8
Objective 2: Access Application Xtender 9
Topic 1: Initial PC Set-up 9
Topic 2: Internet Explorer Browser 9
Topic 2: Access Application Xtender 10
Objective 3: Scan and Import Pages 11
Topic 1: Scan and index 11
Topic 2: Import and Index Using a Networked Scanner 15
Topic 3: Select Multiple Document Types 17
Objective 4: Locate a Document for Viewing 19
Topic 1: Locate a Document 19
Topic 2: Navigate Documents 20
Objective 5: Modify a Document 21
Topic 1: Add a Page to a Document (Business Manager) 21
Topic 2: Replace a Page in a Document (Business Manager) 23
Topic 3: Copy a Page from a Document 25
Topic 4: Add a Page to a Batch 27
Topic 5: Replace a Page in a Batch 28
Topic 6: Change a Document Type 30
Objective 6: Delete a Page or Document 31
Topic 1: Delete a Page from a Document (Business Manager) 31
Topic 2: Delete a Document, or Multiple Documents (Business Manager) 33
Topic 3: Delete an Un-indexed Page from a Batch 35
Topic 4: Delete a Batch 36
Appendix 37
Accessing HR Document Types and Comments 37
Navigating the HR Document Types and Comments Web Site 38
HR Document Types and Comments Quick Reference Listing 40
Initial Set-Up Guide 43
Scanner selection 44
Glossary 45

Introduction

Welcome to the Application Xtender: Web-Based training guide. In this guide you will find the information and job tools you need to successfully use the Application Xtender program for document storage and management. As you progress through the lesson, feel free to take notes in the spaces provided. If at any time you require help to understand something, please ask your instructor.

Terminal Learning Objective:

At the end of this lesson, you will be able to perform the functions necessary to utilize the Application Xtender program.

Enabling Objectives:

1. Describe Application Xtender
2. Access Application Xtender
3. Scan or Import Pages for Indexing
4. Locate a Document
5. Modify a Document
6. Delete a Page or Document

Objective 1: Describe Application Xtender

Topic 1: Define Application Xtender

What is Application Xtender?

Application Xtender is a web-based application. It is a Document Management System used to track and store and manage electronic documents.

These documents are maintained in an electronic personnel file and are sorted by document type.

Documents are associated with a person, by a Banner ID. They are not with any outside applications or transactions.

Documents may be stored in different electronic folders within the application. These folders are created by selecting a document type.

Securing Documents in Application Xtender

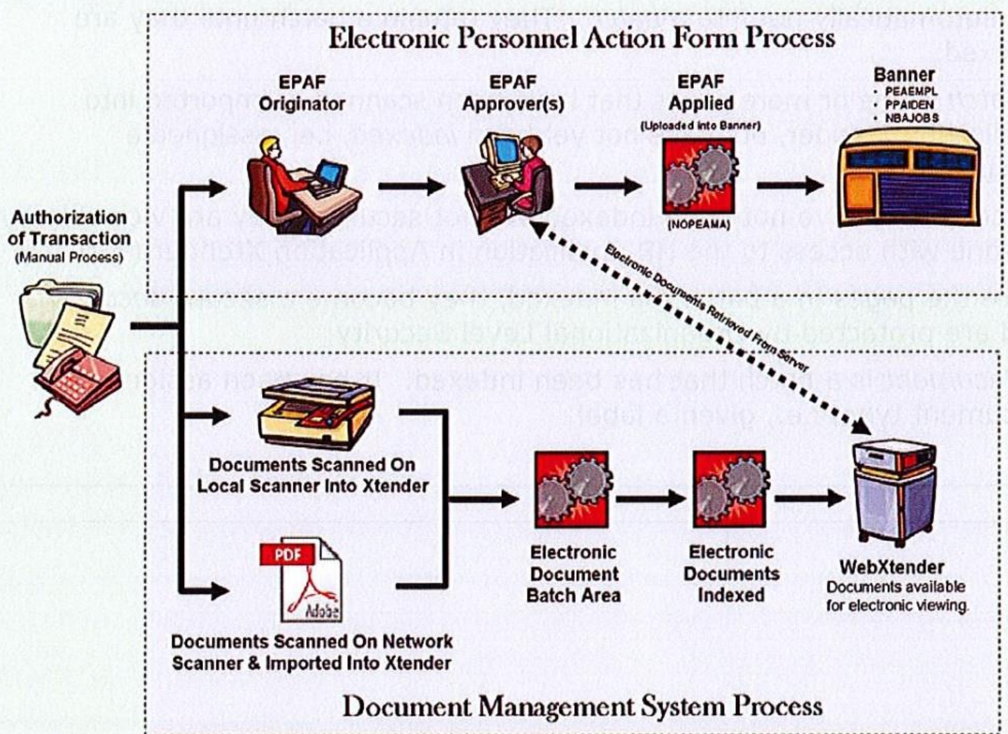
Pages scanned into Application Xtender are only secure after they have been indexed and become *documents*.

- When you scan or import one or more pages into Application Xtender, they are automatically put into a *batch*. They remain a batch until they are indexed.
- A *Batch* is one or more pages that have been scanned or imported into Application Xtender, but have not yet been *indexed*, i.e., assigned a document type.
- Batches that have not been indexed are not secure. They are viewable by anyone with access to the HR application in Application Xtender (B-H-ID).
- Once the pages in a batch are indexed, they become a secure d*ocument*, and are protected by Organizational Level Security.
- A *document* is a batch that has been indexed. It has been assigned a document type, i.e., given a label.

EPAF-Xtender Process Overview

The front-end process of personnel transaction, the initiation and authorization of a personnel transaction, remains a manual process.

- The document(s) that authorize an originator to create an EPAF transaction must me scanned/imported and indexed into WSU's Document Management System using **ApplicationXtender**.
- If you have a local scanner (connected directly to your PC), you will **scan** the document(s) into Xtender.
- If you use a networked scanner or multi-function machine to do your scanning, you will **import** the document(s) into Xtender.
- Documents that are scanned or imported into Xtender are first placed into the **batch area**. This area is outside Home Org security.
- Documents in the batch area are **indexed** (using the employee's Banner ID) into the ApplicationXtender server. Once indexed, the documents are once again under Home Org security.



Objective 2: Access Application Xtender

TOPIC 1: INITIAL PC SET-UP

If you have never accessed ApplicationXtender from your PC or the last time you used ApplicationXtender was prior to March 23, 2008, you or a technical support staff person in you department will need to install an update to the ApplicationXtender Web Access software on you computer.

The steps for installing this update are located on C&IT's website:

http://computing.wayne.edu/banner/docmgnt/ax-web-access-upgrade.php

If you have **administrative rights** to your PC (in other words, you can install software on your PC) and you are comfortable performing the step provided, you can perform your own installation. If you do not have administrative rights to your PC or you are uncomfortable performing the installation, contact your local technician for support.

If you do not know who your local technical support person is, you can go to the web page above and click the link "technical support staff person in your department" and a listing for finding local technicians will display. Find your local tech and request his or her assistance.

TOPIC 2: INTERNET EXPLORER BROWSER

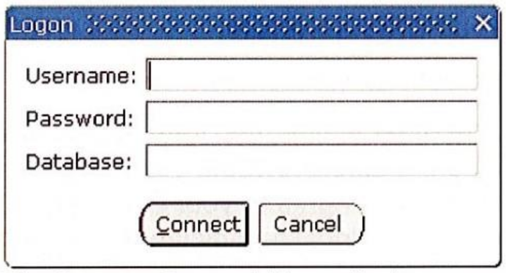
ApplicationXtender will not launch in Mozilla's Firefox or any other internet browser; you can only use Internet Explorer. Beginning with Internet Explorer 7 (IE 7), **do not** install updated versions of Internet Explorer until you receive notification from C&IT that they have tested the newer version and have verified that it will support all WSU applications, e.g., Banner Self-service, ApplicationXtender, and Cognos.

If you inadvertently upgrade your version of Internet Explorer and find that one or more of your WSU application do not function as they did prior to the upgrade, you will have to **uninstall** the newer version and **reinstall** the previous version before the applications will function properly.

TOPIC 2: ACCESS APPLICATION XTENDER

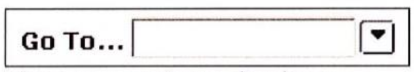
Application Xtender is accessible through Banner in two ways, through two different toolbar buttons. The task you will perform in Application Xtender will determine which toolbar button you select. Both buttons take you to the same application, but they take you to different screens within the application. To access Application Xtender:

1. Log on to Banner as you normally would.



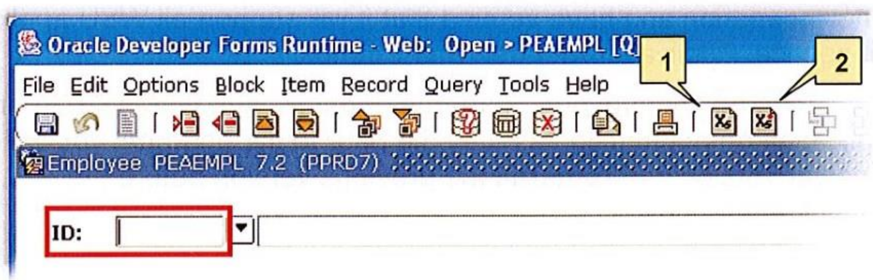
The Banner *General Menu* displays.

2. In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key.



The Banner form displays.

3. You now have two choices for accessing Application Xtender.



<u>Choose Your Path</u>

Button 1: The first shortcut toolbar button  is called the Banner Xtender Solutions.

Use: Click this button to locate, and then view, existing documents. To locate existing documents you will first enter a Banner ID in the field depicted above. When you enter the Banner ID and click the Xtender Solutions button, all documents related to the Banner ID will display.

Button 2: The second shortcut toolbar button  is the BXS-Add Document toolbar button.

Use: Click this button to begin when you want to begin adding documents to the application. You will be directed to the screen in Application Xtender where you may begin scanning or importing documents.

Objective 3: Scan and Import Pages

TOPIC 1: SCAN AND INDEX

Scanning and Importing Tips

- Scanner software is unique to the scanner being used. Your software may look and work different from the software of other scanners.
- Use the smallest file size and resolution that still allows you to view the documents legibly.
- Gray scale is a good choice for many scanners because it has a low resolution and file size.
- PDFs are the recommended file format for importing due to the smaller file size and ease in converting documents to this file type.

Preparing for Scanning

Before beginning the scanning procedure, it is important to make sure your documents and scanner are ready to scan. Here are some general guidelines:

- Make sure all staples and paper clips are removed from the documents.
- Depending on your scanner, documents with color or watermarks may need to be photocopied first so that a black and white copy may be scanned.
- If the order of the documents is important, make sure to put them in the correct order before scanning them. Ordering can be corrected, but with several added steps.
- Make sure you have tested your scanner, and have it set to the recommended WSU quality and file type standards.

Selecting a Document Type

As part of scanning and indexing, you will select a document type and comment. This process is referred to as indexing. In essence, you are selecting a folder label for the documents that you are storing in ApplicationXtender.

Instructions for obtaining the document type and comment from the HR Document Types web site are located in the Appendix section of this Job Aid.

The document type you will select depends on the specific document you are adding to the application. There are over 150 Human Resource documents, each belonging to a specific document type.

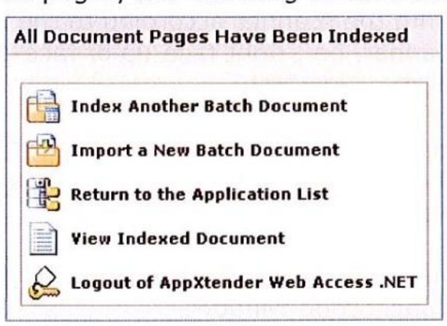
The available document types are:

- Identity
- Benefit
- Medical
- Payroll
- Personnel
- Department
- Equal Opportunity
- Pre-Employment
- Finance
- Legal Labor

You will use the scan function when you have a paper copy of a document that you will store in ApplicationXtender. You can scan in multiple pages at one time, but it is recommended that you only scan pages together when they will be indexed under the same document type and comment.

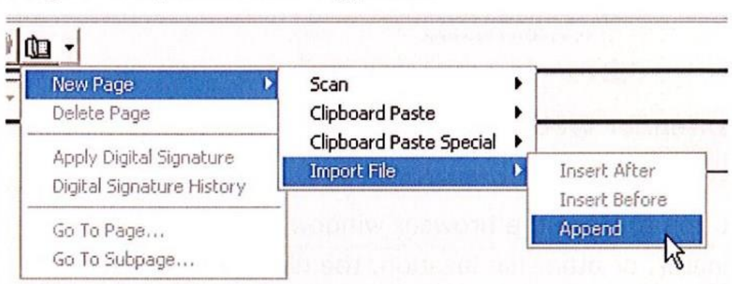
Scan and Index a Document Using a Local Scanner	
Use this procedure to scan documents into Application Xtender and index them by the correct document type.	
1.	Log on to Banner. The Banner *General Menu* displays.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays.
3.	Click in the **ID** field and type the person's **Banner ID** or **WSU Access ID**. The name of the person associated with the Banner ID populates in the next field. If the name is not correct, re-type the correct Banner ID and press Enter.
4.	From the Application Xtender toolbar, click the **BXS - Add Document** toolbar button. Application Xtender opens in a new window.
5.	You should notice that the Scan toolbar button is now active. Note: If the Scan button is not active, you may need to select a scanner. To do this, click the **Scanner Setup** toolbar button, then click **Select Scanner**. **Select the scanner** you wish to use, and click the **OK** button. The Scan toolbar button should now be active. Note: Select the scanner with the letters **TWAIN** preceding it, if given a choice.
6.	Feed the documents into the scanner according to the document orientation guidelines for your scanner, i.e., print face-up or face-down, load from the top of the page or bottom of the page first.
7.	Click the **Scan** toolbar button. Your scanner will launch its scanning software and you must take the steps required to complete the scanning process. Once this is done, you will see the imported pages, or first page of a group of pages, display in the application window.
8.	If you'd like to start from the first page of your scan, you can determine if you are at page one by looking at the page counter near the bottom left-hand portion of the screen. Page 6 of 6 If you want to navigate to page one, or another page, you can use the navigation buttons to move between pages.

Scan and Index a Document - *Continued*

9.	Click the **New** icon. The Indexing panel displays with the Banner ID and related information displayed, as well as a time and date stamp in the Activity Date field.
10.	Click the drop-down arrow of the **Document Type** field. You will see a list of choices for indexing.
11.	After referring to the **HR Document Types** web page, select the appropriate **document type** for the page currently displayed. Your document will be indexed according to your selection. *(For help in accessing the web page, see **Accessing HR Document Types** in the Appendix.)*
12.	Click the down arrow in the **Comments** field. You will see a list of comment choices.
13.	After referring to the **HR Document Types** web page, select the appropriate **comment** for the page currently displayed. *(For help in accessing the web page, see **Accessing HR Document Types** in the Appendix.)*
14.	Click the **Save** [Save] button. This will index the page that was displayed when you clicked the Save button. If there were multiple pages in the scan, you will notice that the page count is reduced by one. Ex. Page 1 of 5 would now read Page 1 of 4.
15.	At this point you have indexed one page. If you have additional pages (one or more): Click the **Attach All Pages** icon. This will index each remaining page under the index selection you just made.
16.	Once you have indexed all pages, the following window will appear.  Select **Logout of AppXtender Web Access .NET**. This will close the application.
17.	Click the **Close** button to close the browser window. **END**

TOPIC 2: IMPORT AND INDEX USING A NETWORKED SCANNER

Importing a document is done when you use a networked scanner, or you already have an electronic copy of a document you will store in Application Xtender. You can import a document from your computer, or a network folder to which you have access.

Import and Index a Document Using a Networked Scanner	
Use this procedure to import documents into Application Xtender and index them by the correct document type.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays. Note: If you are an approver with outstanding electronic approval transactions, you will receive a pop-up message asking if you would like to view these transactions. Click **No** to dismiss it, and continue with the importing process. Approvers will also receive a message asking if they wish to be notified of new transactions during the current session. Click **No** to dismiss this message and continue importing, and the Banner form will display.
3.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. If the name is not correct, re-type the correct Banner ID and press Enter.
4.	From the Application Xtender toolbar, click the **BXS - Add Document** toolbar button. Application Xtender opens in a new window.
5.	Click the Page menu toolbar button and select the following path: **New Page > Import File > Append**.  The Import File window opens.
6.	Locate and **select the file(s)** you wish to import.
7.	Click the **Open** button. The file will populate in Application Xtender.

<table>
<tr><th colspan="2">Scan and Index a Document - Continued</th></tr>
<tr><td>8.</td><td>Navigate to the first page of the document using the navigation buttons .</td></tr>
<tr><td>9.</td><td>Click the New icon.
The Indexing panel displays with the Banner ID and related information displayed, as well as a time and date stamp in the Activity Date field.</td></tr>
<tr><td>10.</td><td>Click the drop-down arrow of the Document Type field.
You will see a list of choices for indexing.</td></tr>
<tr><td>11.</td><td>After referring to the HR Document Types web page, select the appropriate document type for the page currently displayed.
Your document will be indexed according to your selection. (For help in accessing the web page, see Accessing HR Document Types in the Appendix.)</td></tr>
<tr><td>12.</td><td>After referring to the HR Document Types web page, select the appropriate comment for the page currently displayed.
(For help in accessing the web page, see Accessing HR Document Types in the Appendix.)</td></tr>
<tr><td>13.</td><td>Click the Save Save button.
This will index the page that was displayed when you clicked the Save button.
If there were multiple pages in the scan, you will notice that the page count is reduced by one. Ex. Page 1 of 5 would now read Page 1 of 4.</td></tr>
<tr><td>14.</td><td>At this point you have indexed one page.
If you have additional pages (one or more):
Click the Attach All Pages icon.
This will index each remaining page under the index selection you just made.</td></tr>
<tr><td>15.</td><td>Once you have indexed all pages, the following window will appear.


Select Logout of AppXtender Web Access .NET.
This will close the application.</td></tr>
<tr><td>16.</td><td>Click the Close button to close the browser window.</td></tr>
<tr><td>17.</td><td>Delete from your computer, or other file location, the files you imported into Application Xtender.
END</td></tr>
</table>

TOPIC 3: SELECT MULTIPLE DOCUMENT TYPES

It is recommended that you scan only one document at a time to avoid indexing pages under the wrong document type. However, in some cases you may find it easier in your business process to scan or import documents that will be indexed under more than one document type in a single session.

Select Multiple Document Types	
Use this procedure to scan or import pages of differing document types, and index them to their prescribed document types.	
1.	Navigate to the first page you want to index. You can use the navigation buttons to move between pages.
2.	Click the **New** icon. The Indexing panel appears with the Banner ID and related information displayed, as well as a time and date stamp in the Activity Date field.
3.	Click the drop-down arrow of the **Document Type** field. You will see a list of choices for indexing.
4.	Select the appropriate **document type** for the page currently displayed. Your document will be indexed according to your selection.
5.	After referring to the **HR Document Types** web page, select the appropriate **comment** for the page currently displayed. *(For help in accessing the web page, see **Accessing HR Document Types** in the Appendix.)*
6.	Click the **Save** [Save] button. This will index the page that was displayed when you clicked the Save button. If there were multiple pages in the scan, you will notice that the page count is reduced by one. Ex. Page 1 of 5 would now read Page 1 of 4.
7.	At this point you have indexed one page, and the indexing panel information is grayed out. You now have two choices: **A.** If you have additional page(s) to index under the same document type: Navigate to the page. Click the **Attach Page** icon. This will attach the page under the index selection you just made. Repeat this step until all pages under the first document type are indexed. **B.** If you do not have additional pages under the same document type, proceed to the next step to create an additional document type.
8.	Click the **New** icon. The Indexing panel becomes active again for you to select a different document type and add new comments.

Select Multiple Document Types - *Continued*

9.	Click the drop-down arrow of the **Document Type** field and select the next document type. Your document will be indexed according to your selection. *(For help in accessing the web page, see **Accessing HR Document Types** in the Appendix.)*
10.	Again, refer to the **HR Document Types** web page to select the appropriate **comment** for the page currently displayed. *(For help in accessing the web page, see **Accessing HR Document Types** in the Appendix.)*
11.	Click the **Save** button. This will index the page that was displayed when you clicked the Save button.
12.	You now have three choices: **A.** Click Attach All Pages if the rest of the pages fall under this same document type. **B.** Click Attach Page for each page that falls under the current document type, if some of the remaining pages will be save under a different document type. **C.** If you are ready to create another document type with remaining pages, return to **step 8** to click on the New icon. Note: Once you index all pages, you will arrive at the logout screen in step 13.
13.	Once you have attached the page(s), the following window will appear:  Select **Logout of AppXtender Web Access .NET**. This will close the application.
14.	Click the **Close** button to close the browser window. **END**

Objective 4: Locate a Document for Viewing

TOPIC 1: LOCATE A DOCUMENT

Documents are stored in Application Xtender so that they can be located with ease. You may wish to locate a document to view it, or perhaps even modify it. In either case, you will use the Banner ID associated with the documents in order to locate the documents.

Locate a Document in Application Xtender	
Use this procedure to locate documents in Application Xtender using a Banner ID.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays. Note: If you are an approver with outstanding electronic approval transactions, you will receive a pop-up message asking if you would like to view these transactions. Click **No** to dismiss it. Approvers will also receive a message asking if they wish to be notified of new transactions during the current session. Click **No** to dismiss this message, and the Banner form will display.
3.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. If the name is not correct, re-type the correct Banner ID and press Enter.
4.	From the toolbar, click the **Banner XtenderSolutions** toolbar button. • If only one document exists, it will automatically display in Application Xtender, in a new window. • If more than one document exists, Application Xtender opens in a new window with a list of documents displayed.
5.	If more than one document exists, locate the document(s) you wish to view. You can use the information on the screen, such as Activity Date or Comments, to help determine which document you are looking for. The Comments displayed on this screen are the comments that were entered on the indexing screen. Click the **Open Document** icon next to the document type name. The document will display.
6.	When you are done viewing the documents, you may click the **Logout** toolbar button, then click the **OK** button on the confirmation message.
7.	Click the **Close** button to close the browser window. **END**

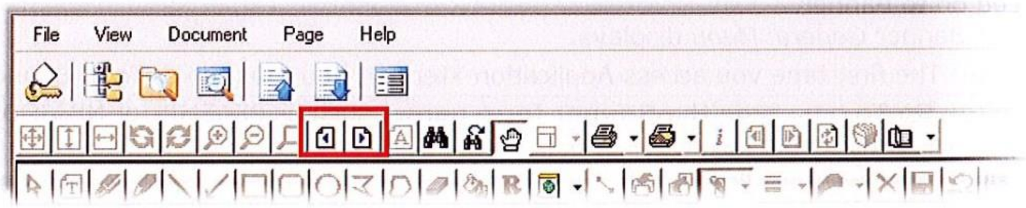
TOPIC 2: NAVIGATE DOCUMENTS

Once you have located a document to view, you can navigate between pages using the navigation arrows. You can also navigate between documents when more than one document type exists for the Banner ID.

It is also possible to see the indexing information for an existing document while viewing it.

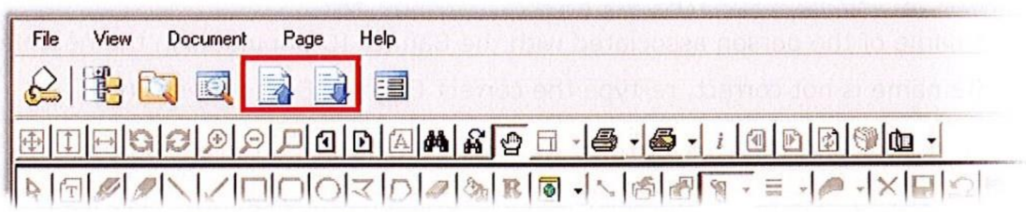
Navigate Documents

If you want to navigate between pages, you can use the navigation buttons .

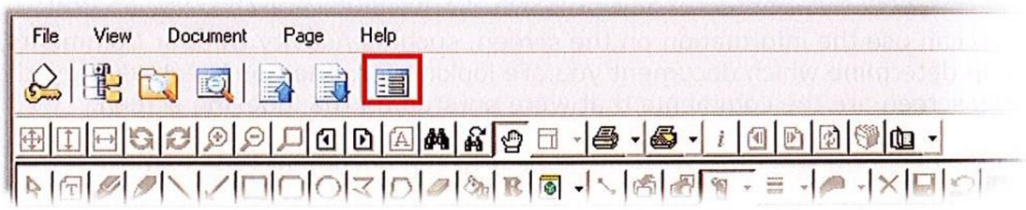


You will see a page counter near the bottom left-hand portion of the screen.

If you want to navigate between documents, you can use the **Previous Document** and **Next Document** icons.



Click the **Document Index** icon to view the indexing information for the document(s). This will show you the activity date, person information, and comments, if any exist.



Click the **Close Indexing** icon to close the indexing panel when you are done viewing the information.

The document will still display in the viewer.

Objective 5: Modify a Document

Topic 1: Add a Page to a Document (Business Manager)

Once you have indexed a document, it is still possible to add a page that is missing as long as you have the permissions to do so. Typically, this functionality has been granted to your units Business Manager.

Add a Page to a Document	
Use this procedure to add a page to an indexed document.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays, and you will automatically receive two pop-up messages.
3.	Click the **No** button on each of the messages.
4.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. Note: If the name is not correct, re-type the correct Banner ID and press Enter.
5.	From the toolbar, click the **Banner XtenderSolutions** toolbar button. • If only one document exists, it will automatically display in Application Xtender, in a new window. • If more than one document exists, Application Xtender opens in a new window with the results listed.
6.	Locate the document in which you wish to replace a page, and click on the **Open Document** icon next to it. The document(s) will display in the viewer.
7.	From the menu bar, click **Page** > **Enable Scanning**. The scanning function will now become active.
8.	You can use the navigation buttons to move between pages of the document. For example, you may wish to add a new page before or after a specific page in the existing document. If so, use these arrows to navigate to that page.
9.	Click the **Page menu** toolbar button.

Add a Page to a Document - *Continued*	
10.	Click **New Page**. You will have two choices.
11.	Select: **Import File**: Select this to import an electronic document OR **Scan**: Select this to scan pages. With either selection, you will be presented with three choices:
12.	**Insert Before**: Select this to insert the document before the page currently displayed in the viewer. **Insert After**: Select this to insert the document after the page currently displayed in the viewer. **Append**: Select this to insert the page(s) at the end of the document.
13.	When you are done, click the **Logout** icon. You will receive a confirmation message.
14.	Click the **OK** button.
15.	Click the **Close** button to close the browser window. **END**

TOPIC 2: REPLACE A PAGE IN A DOCUMENT (BUSINESS MANAGER)

Once a document has been indexed, you have the option of replacing a page, or multiple pages. You may encounter a page that was not legible, upside down, or with important text cut off. When this happens you can simply replace a page instead of deleting the old page, and adding a new page.

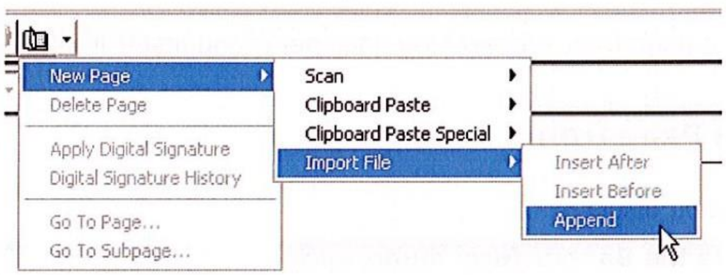
Replace a Page in a Document	
Use this procedure to replace a page in an existing document.	
4.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
5.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays, and you will automatically receive two pop-up messages.
6.	Click the **No** button on each of the messages.
7.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. Note: If the name is not correct, re-type the correct Banner ID and press Enter.
8.	From the toolbar, click the **Banner XtenderSolutions** toolbar button. • If only one document exists, it will automatically display in Application Xtender, in a new window. • If more than one document exists, Application Xtender opens in a new window with the results listed.
9.	Locate the document in which you wish to replace a page, and click on the **Open Document** icon next to it. The document(s) will display in the viewer.
10.	From the menu bar, click **Page** > **Enable Scanning**. The scanning function will now become active.
11.	Locate the page you want to replace. Use the navigation buttons to move between the pages of the document, and locate the specific page you will replace.
12.	To Replace the page currently displayed, click the **Page menu** toolbar button, then click **Replace Page**. You will have two choices.
13.	You may choose: **Scan**: Click this to scan in a new document. **Import File**: Click this to import a document file.

Replace a Page in a Document - *Continued*	
14.	When you are done, click the **Logout** icon. You will receive a confirmation message.
15.	Click the **OK** button.
16.	Click the **Close** button to close the browser window. **END**

TOPIC 3: COPY A PAGE FROM A DOCUMENT

There may be times when it would be helpful to copy a page from an existing document so that it may be inserted into another document. In cases where you already have an electronic copy of the page that needs to be inserted, you can simply import the page as you normally would. If that is not the case, and the page resides in an existing document in Application Xtender, to which you have access, you may take the page from the existing document and insert a copy of that page into another document.

Copy a Page from a Document	
Use this procedure to copy a page from one existing document, and insert it into another existing document	
Copy the Page from an Existing Document	
1.	Log on to Banner. The Banner *General Menu* displays.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays, and you will automatically receive two pop-up messages.
3.	Click the **No** button on each of the messages.
4.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. Note: If the name is not correct, re-type the correct Banner ID and press Enter.
5.	From the toolbar, click the **Banner XtenderSolutions** toolbar button.
6.	Locate the document that you will take the page from to insert into another document, and click on the **Open Document** icon next to it. The document(s) will display in the viewer.
7.	Locate the page you want to copy to another file.
8.	Click the drop-down arrow of the **Print current page** toolbar button.
9.	Select **Export** from the menu.
10.	Save the page to a place where you can easily locate it, such as your computer desktop.
11.	Log out of the application. *Continued on the next page...*

Copy a Page from a Document - *Continued*	
Insert the Page in a Separate Existing Document	
1.	Log back in through the Banner General Menu, this time using the Banner ID associated with the document to which you will copy the page that you just saved.
2.	Locate and open the document you to which you will copy the page.
3.	Click the Page menu toolbar button and select the following path: **New Page > Import File > Append**. 
4.	Locate and select the document you just saved, and click **Open**. It will now be added to the existing document.
5.	When you are done, click the **Logout** icon. You will receive a confirmation message.
6.	Click the **OK** button.
7.	Click the **Close** button to close the browser window. **END**

TOPIC 4: ADD A PAGE TO A BATCH

If pages are scanned or indexed into Application Xtender but not immediately indexed, they are considered a batch. All batches reside in a batch list. The batch list is accessible by all users who have access to the application in which that batch resides. Any user who can view the batch can add a page to it.

Add a Page to a Batch	
Use this procedure to add a page to a batch.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. Click **No** to dismiss any messages that display, and the Banner form will open.
3.	From the toolbar, click the **BXS –Add Document** toolbar button. Application Xtender opens in a new window.
4.	Click the **Batch List** icon. A list of un-indexed batches displays.
5.	Locate the batch you want, and click the **Open Batch for Indexing** icon next to it. The page(s) from the batch will display in the viewer.
6.	Click the **Return to Batch Scanning** icon. The scanning function will become active.
7.	Click the **Page Menu** toolbar button, select **New Page**, and then one of the following two paths: **Scan** > **Append**: To scan in a new document. **Import File** > **Append**: To import a document file. The page will be added to the end of the existing pages.
8.	When you are done adding pages, you may click the **Logout** toolbar button, then click the **OK** button on the confirmation message.
9.	Click the **Close** button to close the browser window. **END**

TOPIC 5: REPLACE A PAGE IN A BATCH

In order to replace a page in a batch, you must go through a simple two-part process. First you will delete the page you want to replace, and then you will add a new page to the document as its replacement. The only limitation to this process is that the inserted page will automatically move to the end of the document.

Replace a Page in a Batch	
Use this procedure to replace a page in a batch.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. Click **No** to dismiss any messages that display, and the Banner form will open.
3.	From the toolbar, click the **BXS –Add Document** toolbar button. Application Xtender opens in a new window.
4.	Click the **Batch List** icon. A list of un-indexed batches displays.
5.	Locate the batch you want, and click the **Open Batch for Indexing** icon next to it. The pages(s) from the batch will display in the viewer.
6.	Click the **Return to Batch Scanning** icon. The scanning function will become active.
7.	You may use the **Next** and **Previous** toolbar buttons to navigate through multiple pages.
8.	Once you have located the page you wish to replace, click the **Page Menu** toolbar button, and select **Delete**. The page is deleted.
9.	To add a new page (which will only be saved at the end of the existing pages), click the **Page Menu** toolbar button, select **New Page**, and then one of the following two paths: **Scan** > **Append**: To scan in a new document. **Import File** > **Append**: To import a document file. The document will be added to the end of the existing pages. You may add additional pages as needed.

Replace a Page in a Batch - *Continued*	
10.	When you are done viewing the documents, you may click the **Logout** toolbar button, then click the **OK** button on the confirmation message.
11.	Click the **Close** button to close the browser window. **END**

Topic 6: Change a Document Type

If a document has been indexed to the incorrect document type, it is possible to change the document type in Application Xtender.

Change a Document Type	
Use this procedure to change the document type of an existing document.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. Click **No** to dismiss any messages that display, and the Banner form will open.
3.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. If the name is not correct, re-type the correct Banner ID and press Enter.
4.	From the toolbar, click the **Banner XtenderSolutions** toolbar button. • If only one document exists, it will display in Application Xtender, in a new window. • If more than one document exists, Application Xtender opens in a new window with a list of documents.
5.	If more than one document exists, locate the document(s) you wish to view. Click the **Open Document** icon next to the document type name. The document will display.
6.	If you want to navigate between pages, you can use the navigation buttons .
7.	Click the **Document Index** icon. The indexing panel will display with all fields grayed out (inactive).
8.	Click the **Modify** Modify button OR the **Modify** icon. The fields on the indexing panel become active.
9.	Click the drop-down arrow of the **Document Type** field and select the correct document type.
10.	Click the **Save** Save button. The document is saved under the document type you selected.
11.	When you are done viewing the documents, you may click the **Logout** toolbar button, then click the **OK** button on the confirmation message.
12.	Click the **Close** button to close the browser window. **END**

Objective 6: Delete a Page or Document

Topic 1: Delete a Page from a Document (Business Manager)

If there is a page in a document that has been included in error, you can easily remove the page from the document.

Delete a Page from a Document	
Use this procedure to delete a page, or multiple pages, from an indexed document. To delete an entire document, please refer to the Delete a Document procedure.	
1.	Log on to Banner. The Banner *General Menu* displays.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays, and you will automatically receive two pop-up messages.
3.	Click the **No** button on each of the messages.
4.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. Note: If the name is not correct, re-type the correct Banner ID and press Enter.
5.	From the toolbar, click the **Banner XtenderSolutions** toolbar button. • If only one document exists for that Banner ID, it will automatically display in Application Xtender, in a new window. • If more than one batch exists, Application Xtender opens in a new window with the results listed.
6.	Locate the document, and click on the **Open Document** icon. The document displays in the viewer.
7.	Use the Next and Previous buttons to navigate between pages, and locate the page you will delete.
8.	Once you have arrived at the page you wish to delete, click the **Page Menu** toolbar button and select **Delete Page**. You will receive a confirmation box.
9.	Click **Yes** to confirm you want to delete the page. If there were multiple pages in the document, you will notice that the page count is reduced by one. Ex. Page 1 of 5 would now read Page 1 of 4. Note: You may repeat this process to delete additional pages.

Delete a Page from a Document - *Continued*	
10.	When you are done deleting pages, you may click the **Logout** toolbar button. You will receive a confirmation message.
11.	Click the **OK** button.
12.	Click the **Close** button to close the browser window. **END**

TOPIC 2: DELETE A DOCUMENT, OR MULTIPLE DOCUMENTS (BUSINESS MANAGER)

Note: The delete function within indexed documents is restricted to approved, unit Business Managers.

There are multiple ways to delete an indexed document. It is not important which method you use. It is important to verify that you are deleting the correct document before proceeding.

Delete a Document	
Use this procedure to delete a document, or multiple documents from Application Xtender.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. The Banner form displays, and you will automatically receive two pop-up messages.
3.	Click the **No** button on each of the messages.
4.	Click in the **ID** field and type the person's **Banner ID**. The name of the person associated with the Banner ID populates in the next field. Note: If the name is not correct, re-type the correct Banner ID and press Enter.
5.	From the toolbar, click the **Banner XtenderSolutions** toolbar button. • If only one document exists for that Banner ID, it will automatically display in Application Xtender, in a new window. • If more than one batch exists, Application Xtender opens in a new window with the results listed.
Delete Using the Delete Icon	
1.	Locate the document(s) you want to delete.
2.	Click in the **checkbox** ☐ next to the document(s) you will delete.
3.	Click the **Delete Selected Documents** icon. You will receive a confirmation message.
4.	Click the **Yes** button. The selected document(s) will be deleted.
5.	OR, to delete a single document, right-click on the **Open Document** icon and select **Delete**. You will receive a confirmation message.

Delete a Document - *Continued*	
Delete Using the Document Menu	
6.	Click the **OK** button. The document is deleted.
7.	Right-click on the **Open Document** icon and select **Delete**. You will receive a confirmation message.
8.	Click the **OK** button. The document is deleted.
9.	When you are done deleting documents, you may click the **Logout** toolbar button. You will receive a confirmation message.
10.	Click the **OK** button.
11.	Click the **Close** button to close the browser window. **END**

TOPIC 3: DELETE AN UN-INDEXED PAGE FROM A BATCH

Before you have indexed a page(s) to make it a secure document, you can easily delete any pages that are not needed. Once you locate the correct batch, you can delete pages from the batch using the built-in delete function.

Delete a Page from a Batch	
Use this procedure to delete a page, or multiple pages, from a batch. If you want to delete the entire batch, please refer to the Delete a Batch procedure.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. Click **No** to dismiss any messages that display, and the Banner form will open.
3.	From the toolbar, click the **BXS -Add Document** toolbar button. Application Xtender opens in a new window.
4.	Click the **Batch List** icon. A list of un-indexed batches displays.
5.	Locate the batch you want, and click the **Open Batch for Indexing** icon next to it. The document(s) will display in the viewer.
6.	Click the **Return to Batch Scanning** icon. The scanning function will become active.
7.	You may use the **Next** and **Previous** toolbar buttons to navigate through multiple pages.
8.	Once you have located the page you wish to replace, click the **Page Menu** toolbar button, and select **Delete**. The page is deleted.
9.	When you are done deleting pages, you may click the **Logout** toolbar button, then click the **OK** button on the confirmation message.
10.	Click the **Close** button to close the browser window. **END**

TOPIC 4: DELETE A BATCH

If you need to delete a batch from Application Xtender, you can do so very easily from the batch list. It is equally simple to delete multiple batches at the same time. Always confirm that you are deleting the correct batch before proceeding.

Delete a Batch	
Use this procedure to delete a page, or multiple pages, from a batch. If you want to delete the entire batch, please refer to the Delete a Batch procedure.	
1.	Log on to Banner. The Banner *General Menu* displays. Note: The first time you access Application Xtender, you must do so from Banner.
2.	In the **Go To** box, **type the Banner form name**, such as PEAEMPL or NBAJOBS, and press the **Enter** key. Click **No** to dismiss any messages that display, and the Banner form will open.
3.	From the toolbar, click the **BXS –Add Document** toolbar button. Application Xtender opens in a new window.
4.	Click the **Batch List** icon. A list of un-indexed batches displays.
5.	Click the **check box** ☐ next to the batch you want to delete.
6.	Click the **Delete Batch** icon. You will receive a confirmation message.
7.	Click the **OK** button. The documents are deleted.
8.	When you are done deleting pages, you may click the **Logout** toolbar button, and then click the OK button on the confirmation message.
9.	Click the **Close** button to close the browser window. **END**

Appendix

ACCESSING HR DOCUMENT TYPES AND COMMENTS

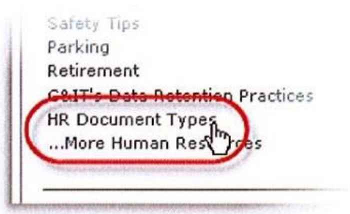
During the indexing stage of the process, you will need two pieces of information:

1. Document Type
2. Standard Comment

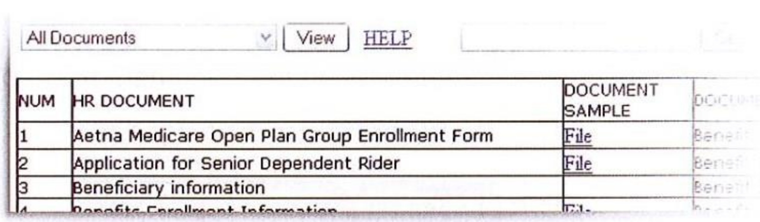
This information resides on a web site that you can access through Pipeline. To open this site, follow the steps below.

1. Log into Pipeline.'
2. Click the Employee tab.

3. Under Employee Services, scroll to the bottom of the panel and click HR Document Types.



4. If you are using Internet Explorer, the HR Document Types web page will open in a new browser



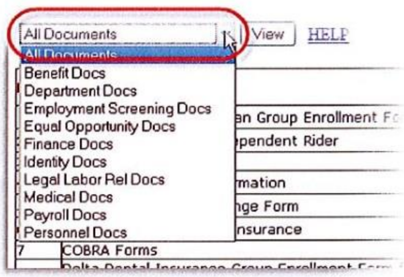
NAVIGATING THE HR DOCUMENT TYPES AND COMMENTS WEB SITE

On this web site there are 156 Human Resource related documents many of which are associated with EPAF transactions. These documents are sorted into 10 categories or document types.

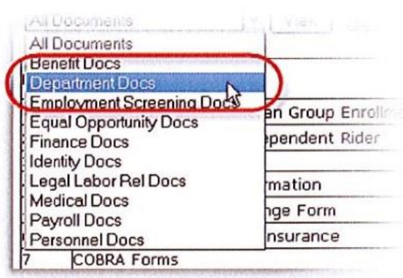
To assist you in locating the information you need, this web site is equipped with view (filter) and search functions.

The View Function

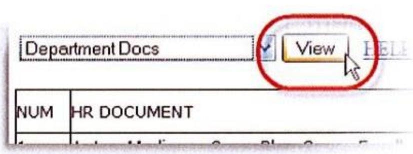
1. To view the documents within a specific document type, click the down arrow to the right of All Documents. A list of the 10 document types will display.



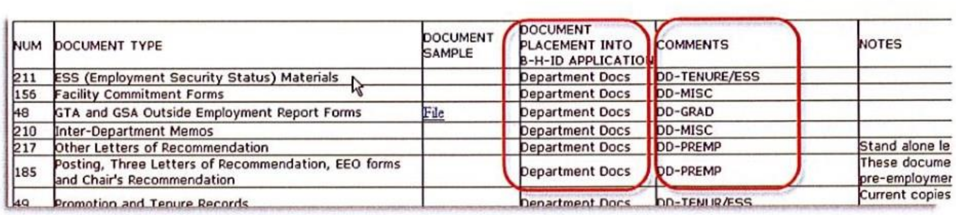
2. Select the document type you want to view from the list.



3. Then, click the View button.



4. When the page refreshes, only the documents within the document type you selected will display with the associated comments.



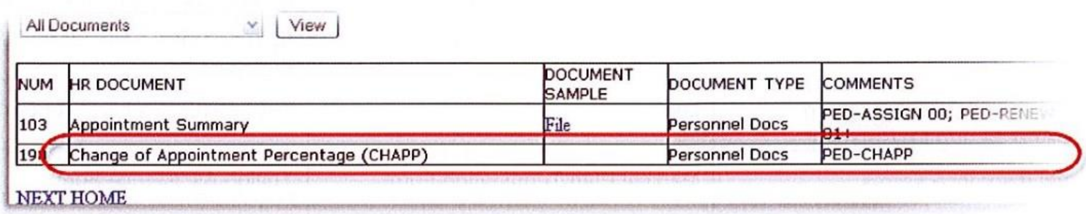
NUM	DOCUMENT TYPE	DOCUMENT SAMPLE	DOCUMENT PLACEMENT INTO B-H-ID APPLICATION	COMMENTS	NOTES
211	ESS (Employment Security Status) Materials		Department Docs	DD-TENURE/ESS	
156	Facility Commitment Forms		Department Docs	DD-MISC	
48	GTA and GSA Outside Employment Report Forms	File	Department Docs	DD-GRAD	
210	Inter-Department Memos		Department Docs	DD-MISC	
217	Other Letters of Recommendation		Department Docs	DD-PREMP	Stand alone le
185	Posting, Three Letters of Recommendation, EEO forms and Chair's Recommendation		Department Docs	DD-PREMP	These docume pre-employmer
49	Promotion and Tenure Records		Department Docs	DD-TENUR/ESS	Current copies

The Search Function

The Search function is a quick way to locate a document by its name. In this example, we will search for a Change of Appointment Percent memo. You can use all or a portion of the document name to search on.

1. From the first screen of the web site, enter the name or a portion of the name into the Search field and click the Search button.

2. When the page refreshes, only those document with the name or portion of the name you entered into the Search field will be displayed.



3. Locate you document in the list (if more than one is displayed), and you will find both the document type and comment for completing your document indexing in ApplicationXtender

HR Document Types and Comments Quick Reference Listing

This Document Types listing is provided to you as a quick reference to use in conjunction with the HR Document Types web site. To ensure accuracy of the indexing process, always obtain your document type and comments from the HR Documents Type web site.

Benefit Documents		
Aetna Medicare Open Plan Group Enrollment Form	Hardship Withdrawal Notice and Forms	Retiree Benefit Continuation Form
Application for Senior Dependent Rider	Job Audit Letter	Retiree Benefit Continuation Form (Age 65 and over)
Beneficiary information	Leave of Absence Benefit Continuation Application Form	Retiree Benefit Continuation Form (Under Age 65)
Benefits Enrollment Information	Life Insurance	Retirement Contribution Forms
Benefits Enrollment/Change Form	Life Insurance Change of Beneficiary Form (Retirees Only)	Retiring from University Service Forms
Cash in Lieu of Medical Insurance	Life Status Change Form	Salary Reduction Agreement
COBRA Forms	Long-Term Disability forms (application)	Spouse/Child Tuition Benefit Application
Delta Dental Insurance Group Enrollment Form for Retirees	Medical Insurance Forms	TIAA-CREF Enrollment Form
Dental Insurance Forms	Medical Plan Termination Form	Tuition Assistance Forms
Disabled Dependent Application and Employee Certification	Notice of Conversion Privilege / Request for Quotation	Vision Forms
Employee Tuition Assistance Application	Personal Health Application	Voluntary Vision Enrollment/Change Form
EyeMed Vision Insurance Group Enrollment Form for Retirees	Portability Application	WSU Retiree Medical Insurance Enrollment Form (Non-Aetna)
Fidelity Investments Account Application	Position Questionnaire	Young Adult Audit Letter
Group Life Insurance Enrollment/Change Form	Pre-tax Medical Opt Out Form	
HAP Senior Plus Group Enrollment Form	Retiree AccessID Request Form	
Department Documents		
Correspondence to Departments/Employees regarding employee status	FMLA request for leave form (inc. letter of approval)	Promotion and Tenure Records
Disciplinary Letters	GTA and GSA Outside Employment Report Forms	Request for Additional Service Assignment Graduate Assistants
ESS (Employment Security Status) Materials	Inter-Department Memos	Student Assistant - Declaration of Off Semester
Facility Commitment Forms	Posting, three Letters of Recommendation, EEO forms and chair's recommendation	Student Assistant - Exception to work beyond 20 hours per week
Student Assistant, CWS - Actual Sign-In and Sign-out Timesheets		

Equal Opportunity Documents		
ADA Accommodations paperwork	Request for Accommodation of Disability Form	Veteran Survey Form
Finance Documents		
5% Labor Exception	Agreement for Reimbusement of Moving Expenses (> $10,000)	Financial Responsibility Form
Change of Labor forms and supporting documents including 60 Day Wavier		
Identity Documents		
Certificate of Naturalization(Form N-550 or N-570)	OISS Clearance Forms	Unexpired Employment Authorization Card (Form 766, I-688, I-688A, I-688B)
Certificate of U.S. Citizenship(Form N-560 or N-561)	Original or certified copy of a birth certificate issued by a state, county, municipal authority or outlying possession of the United States bearing an official seal	Unexpired employment authorization document issued by DHS (other than those listed under List A)
Certification of Birth Abroad issued by the Department of State (FormFS-545 or Form DS-1350)	Permanent Resident Card or Alien Registration Receipt Card with photograph(Form I-151 or I-551)	Unexpired foreign passport, with unexpired Arrival-Departure Records, Form I-94
Driver's license issued by a Canadian government authority	School ID card with a photograph	Unexpired Reentry Permit (Form I-327)
Driver's license or ID card issued by a state or outlying possession of the United States containing a photograph or information such as name, date of birth, gender, height, eye color and address	School record or report card	Unexpired Refugee Travel Document (Form 1-571)
I-9 Employment Eligibility Verification Original Form with Signature	U.S. Citizen ID Card (Form I-197)	Unexpired Temporary Resident Card (Form I-688)
ID Card for use of Resident Citizen in the United States(Form I-179)	U.S. Passport (unexpired or expired)	
ID card issued by federal, state or local government agencies/entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address	U.S. social security card issued by the Social Security Administration) or Student IT/IN Card	
Legal Labor Related Documents		
Grievances		
Medical Documents		
Correspondence from Employee	Doctors' Statements	Notes regarding phone conversations with employee
Correspondence from Risk Management/Labor	FMLA Medical Certification	Second and Third Doctor opinions
Correspondence to Departments/Employees regarding employee status	FMLA request for leave form	Copy of Long-term Disability approval memo from TCW

Payroll Documents		
8233 Tax Treaty	W-8 Ben	Last Day of Work/Pay Notice
Court orders for garnishment (Payroll)	Canadian Direct Deposit	Michigan State Tax Cards
Late Paper Timesheets	Detroit City Tax Cards	W-2s
Stipend and/or Housing Subsidy Recipient Form	Federal Tax Cards (W-4)	

Personnel Documents		
Appointment Summary	Employment/Award Agreements	Requests to Review Files
Bonus Recommendations	ESS Letter with Signature	Sabbatical, Awards, P&T, Merit Salary
Certificate of Relevancy	Graduate Employee Organizing Committee Support Allocation Form	Separation /Severance Agreements
Change in Tenure Clock Start Date	Hiring Waivers	Settlements
Changes in Address	Jury Duty Notices	Tenure Clock Stopage
Changes in Name	Justification memos to hire	Tenure Letter with Signature
Conditions of Employment for Temporary Employee	Letters of Offer	Termination docs
Copies of Subpoenas	Mass Salary Notification	Transcripts
Curriculum Vitaes (CV)/Resumes	Performance Improvement Plans	Unpaid Leave of Absence Memo
Degree Waivers	Performance Reviews	Veteran Info/Service Order Military Leave Order
Employee Data Form for New Hires	Position Action Request Form	Waivers of Posting
Employment Applications	Posting	

Pre-Employment Documents		
Criminal Record Reports	Fingerprint Reports	

Workers Compensation Documents		
Correspondence regarding Worker's Comp	Litigated Documentation	Report of Injury/Investigative Report
File Notations	Medical Reports	State of MI Records
Invoices/Payments	Payroll/Wage Loss Information	

F.

Choosing a Scanner

The scanner buying guideline is available online. Review the information at the link provided to see all technical specifications and suggested scanners.
http://computing.wayne.edu/hardware/scanner.php

Important things to keep in mind:

- Choose a scanner first based on how many pages you expect to scan in a day. Some scanners are not meant for high volume.
- If you must scan multiple pages at a time, select a scanner with an automatic document feeder. A scanner with a flatbed only will only allow you to scan one page at a time.
- If you must regularly scan two-sided documents, choose a scanner with a duplex (two-sided) scanning function.
- If you require scanning of documents bigger than 8 1/2 X 11 (such as 8 1/2 x 14), select a scanner that will accommodate this size.
- If purchasing a scanner with an automatic document feeder, choose one with more than one roller. This helps to keep the page straight as it feeds into the scanner.

Glossary

This glossary includes a list of key terms that you should become familiar with when using Application Xtender for document management.

Document Management System	A computer-based system or program used to track and store electronic documents and/or images of paper documents
Application Xtender	The application used to manage electronic documents. Users will scan documents, and assign document types to them for viewing later.
Batch	Page(s) scanned into Application Xtender that have not yet been indexed.
Document	Page(s) scanned into Application Xtender that have been indexed, i.e., assigned a document type.
Page	This can refer to a single electronic page in either a *batch* or a *document*.
Scan	To capture a document electronically in Application Xtender by using a scanner that is recognized by Application Xtender.
Import	To bring an already existing electronic document into Application Xtender, such as a PDF. This does not require the use of a scanner.
Index/Indexing	Selecting a document type for page(s) scanned into Application Xtender.
Document Type	When indexing a batch, you must select a *Document Type*, e.g., Personnel or Identity, before saving the batch as a document. This groups documents of the same type together.
Comments	A field on the indexing panel where you can type up to 30-characters of information. These comments are saved with the document, and can make it easy to locate it among multiple documents.
Organizational Level Security	A way to secure documents that allows only authorized individuals to view them.
Secure (document)	A document that is only viewable by someone with the correct Organizational Level Security. Once a document is indexed in Application Xtender, it becomes a *secure* document.
Server	A physical storage location for documents kept in Application Xtender. Documents scanned or imported into Application Xtender are stored on a computer server.
B-H-ID	The Banner HR Common application. An HR application you are logged into when in Application Xtender. Only people with B-H-ID access can get into Application Xtender this way.

I-9 Express

Instructions for Employment Eligibility Verification

Department of Homeland Security
U.S. Citizenship and Immigration Services

Read all instructions carefully before completing this form.

Anti-Discrimination Notice. It is illegal to discriminate against any work-authorized individual in hiring, discharge, recruitment or referral for a fee, or in the employment eligibility verification (Form I-9 and E-Verify) process based on that individual's citizenship status, immigration status or national origin. Employers **CANNOT** specify which document(s) they will accept from an employee. The refusal to hire an individual because the documentation presented has a future expiration date may also constitute illegal discrimination. For more information, call the Office of Special Counsel for Immigration-Related Unfair Employment Practices (OSC) at 1-800-255-7688 (employees), 1-800-255-8155 (employers), or 1-800-237-2515 (TDD), or visit **www.justice.gov/crt/about/osc**.

What Is the Purpose of This Form?

Employers must complete Form I-9 to document verification of the identity and employment authorization of each new employee (both citizen and noncitizen) hired after November 6, 1986, to work in the United States. In the Commonwealth of the Northern Mariana Islands (CNMI), employers must complete Form I-9 to document verification of the identity and employment authorization of each new employee (both citizen and noncitizen) hired after November 27, 2011. Employers should have used Form I-9 CNMI between November 28, 2009 and November 27, 2011.

General Instructions

Employers are responsible for completing and retaining Form I-9. For the purpose of completing this form, the term "employer" means all employers, including those recruiters and referrers for a fee who are agricultural associations, agricultural employers, or farm labor contractors.

Form I-9 is made up of three sections. Employers may be fined if the form is not complete. Employers are responsible for retaining completed forms. Do not mail completed forms to U.S. Citizenship and Immigration Services (USCIS) or Immigration and Customs Enforcement (ICE).

Section 1. Employee Information and Attestation

Newly hired employees must complete and sign Section 1 of Form I-9 **no later than the first day of employment**. Section 1 should never be completed before the employee has accepted a job offer.

Provide the following information to complete Section 1:

Name: Provide your full legal last name, first name, and middle initial. Your last name is your family name or surname. If you have two last names or a hyphenated last name, include both names in the last name field. Your first name is your given name. Your middle initial is the first letter of your second given name, or the first letter of your middle name, if any.

Other names used: Provide all other names used, if any (including maiden name). If you have had no other legal names, write "N/A."

Address: Provide the address where you currently live, including Street Number and Name, Apartment Number (if applicable), City, State, and Zip Code. Do not provide a post office box address (P.O. Box). Only border commuters from Canada or Mexico may use an international address in this field.

Date of Birth: Provide your date of birth in the mm/dd/yyyy format. For example, January 23, 1950, should be written as 01/23/1950.

U.S. Social Security Number: Provide your 9-digit Social Security number. Providing your Social Security number is voluntary. However, if your employer participates in E-Verify, you must provide your Social Security number.

E-mail Address and Telephone Number (Optional): You may provide your e-mail address and telephone number. Department of Homeland Security (DHS) may contact you if DHS learns of a potential mismatch between the information provided and the information in DHS or Social Security Administration (SSA) records. You may write "N/A" if you choose not to provide this information.

All employees must attest in Section 1, under penalty of perjury, to their citizenship or immigration status by checking one of the following four boxes provided on the form:

1. **A citizen of the United States**
2. **A noncitizen national of the United States:** Noncitizen nationals of the United States are persons born in American Samoa, certain former citizens of the former Trust Territory of the Pacific Islands, and certain children of noncitizen nationals born abroad.
3. **A lawful permanent resident:** A lawful permanent resident is any person who is not a U.S. citizen and who resides in the United States under legally recognized and lawfully recorded permanent residence as an immigrant. The term "lawful permanent resident" includes conditional residents. If you check this box, write either your Alien Registration Number (A-Number) or USCIS Number in the field next to your selection. At this time, the USCIS Number is the same as the A-Number without the "A" prefix.
4. **An alien authorized to work:** If you are not a citizen or national of the United States or a lawful permanent resident, but are authorized to work in the United States, check this box.

   If you check this box:

   a. Record the date that your employment authorization expires, if any. Aliens whose employment authorization does not expire, such as refugees, asylees, and certain citizens of the Federated States of Micronesia, the Republic of the Marshall Islands, or Palau, may write "N/A" on this line.

   b. Next, enter your Alien Registration Number (A-Number)/USCIS Number. At this time, the USCIS Number is the same as your A-Number without the "A" prefix. If you have not received an A-Number/USCIS Number, record your Admission Number. You can find your Admission Number on Form I-94, "Arrival-Departure Record," or as directed by USCIS or U.S. Customs and Border Protection (CBP).

   (1) If you obtained your admission number from CBP in connection with your arrival in the United States, then also record information about the foreign passport you used to enter the United States (number and country of issuance).

   (2) If you obtained your admission number from USCIS *within the United States*, or you entered the United States without a foreign passport, you must write "N/A" in the Foreign Passport Number and Country of Issuance fields.

Sign your name in the "Signature of Employee" block and record the date you completed and signed Section 1. By signing and dating this form, you attest that the citizenship or immigration status you selected is correct and that you are aware that you may be imprisoned and/or fined for making false statements or using false documentation when completing this form. To fully complete this form, you must present to your employer documentation that establishes your identity and employment authorization. Choose which documents to present from the Lists of Acceptable Documents, found on the last page of this form. You must present this documentation no later than the third day after beginning employment, although you may present the required documentation before this date.

Preparer and/or Translator Certification

The Preparer and/or Translator Certification must be completed if the employee requires assistance to complete Section 1 (e.g., the employee needs the instructions or responses translated, someone other than the employee fills out the information blocks, or someone with disabilities needs additional assistance). The employee must still sign Section 1.

Minors and Certain Employees with Disabilities (Special Placement)

Parents or legal guardians assisting minors (individuals under 18) and certain employees with disabilities should review the guidelines in the *Handbook for Employers: Instructions for Completing Form I-9 (M-274)* on **www.uscis.gov/I-9Central** before completing Section 1. These individuals have special procedures for establishing identity if they cannot present an identity document for Form I-9. The special procedures include **(1)** the parent or legal guardian filling out Section 1 and writing "minor under age 18" or "special placement," whichever applies, in the employee signature block; and **(2)** the employer writing "minor under age 18" or "special placement" under List B in Section 2.

Section 2. Employer or Authorized Representative Review and Verification

Before completing Section 2, employers must ensure that Section 1 is completed properly and on time. Employers may not ask an individual to complete Section 1 before he or she has accepted a job offer.

Employers or their authorized representative must complete Section 2 by examining evidence of identity and employment authorization within 3 business days of the employee's first day of employment. For example, if an employee begins employment on Monday, the employer must complete Section 2 by Thursday of that week. However, if an employer hires an individual for less than 3 business days, Section 2 must be completed no later than the first day of employment. An employer may complete Form I-9 before the first day of employment if the employer has offered the individual a job and the individual has accepted.

Employers cannot specify which document(s) employees may present from the Lists of Acceptable Documents, found on the last page of Form I-9, to establish identity and employment authorization. Employees must present one selection from List A **OR** a combination of one selection from List B and one selection from List C. List A contains documents that show both identity and employment authorization. Some List A documents are combination documents. The employee must present combination documents together to be considered a List A document. For example, a foreign passport and a Form I-94 containing an endorsement of the alien's nonimmigrant status must be presented together to be considered a List A document. List B contains documents that show identity only, and List C contains documents that show employment authorization only. If an employee presents a List A document, he or she should **not** present a List B and List C document, and vice versa. If an employer participates in E-Verify, the List B document must include a photograph.

In the field below the Section 2 introduction, employers must enter the last name, first name and middle initial, if any, that the employee entered in Section 1. This will help to identify the pages of the form should they get separated.

Employers or their authorized representative must:

1. Physically examine each original document the employee presents to determine if it reasonably appears to be genuine and to relate to the person presenting it. The person who examines the documents must be the same person who signs Section 2. The examiner of the documents and the employee must both be physically present during the examination of the employee's documents.
2. Record the document title shown on the Lists of Acceptable Documents, issuing authority, document number and expiration date (if any) from the original document(s) the employee presents. You may write "N/A" in any unused fields.

   If the employee is a student or exchange visitor who presented a foreign passport with a Form I-94, the employer should also enter in Section 2:

   a. The student's Form I-20 or DS-2019 number (Student and Exchange Visitor Information System-SEVIS Number); **and** the program end date from Form I-20 or DS-2019.
3. Under Certification, enter the employee's first day of employment. Temporary staffing agencies may enter the first day the employee was placed in a job pool. Recruiters and recruiters for a fee do not enter the employee's first day of employment.
4. Provide the name and title of the person completing Section 2 in the Signature of Employer or Authorized Representative field.
5. Sign and date the attestation on the date Section 2 is completed.
6. Record the employer's business name and address.
7. Return the employee's documentation.

Employers may, but are not required to, photocopy the document(s) presented. If photocopies are made, they should be made for **ALL** new hires or reverifications. Photocopies must be retained and presented with Form I-9 in case of an inspection by DHS or other federal government agency. Employers must always complete Section 2 even if they photocopy an employee's document(s). Making photocopies of an employee's document(s) cannot take the place of completing Form I-9. Employers are still responsible for completing and retaining Form I-9.

Unexpired Documents

Generally, only unexpired, original documentation is acceptable. The only exception is that an employee may present a certified copy of a birth certificate. Additionally, in some instances, a document that appears to be expired may be acceptable if the expiration date shown on the face of the document has been extended, such as for individuals with temporary protected status. Refer to the *Handbook for Employers: Instructions for Completing Form I-9 (M-274)* or I-9 Central (www.uscis.gov/I-9Central) for examples.

Receipts

If an employee is unable to present a required document (or documents), the employee can present an acceptable receipt in lieu of a document from the Lists of Acceptable Documents on the last page of this form. Receipts showing that a person has applied for an initial grant of employment authorization, or for renewal of employment authorization, are not acceptable. Employers cannot accept receipts if employment will last less than 3 days. Receipts are acceptable when completing Form I-9 for a new hire or when reverification is required.

Employees must present receipts within 3 business days of their first day of employment, or in the case of reverification, by the date that reverification is required, and must present valid replacement documents within the time frames described below.

There are three types of acceptable receipts:

1. A receipt showing that the employee has applied to replace a document that was lost, stolen or damaged. The employee must present the actual document within 90 days from the date of hire.
2. The arrival portion of Form I-94/I-94A with a temporary I-551 stamp and a photograph of the individual. The employee must present the actual Permanent Resident Card (Form I-551) by the expiration date of the temporary I-551 stamp, or, if there is no expiration date, within 1 year from the date of issue.
3. The departure portion of Form I-94/I-94A with a refugee admission stamp. The employee must present an unexpired Employment Authorization Document (Form I-766) or a combination of a List B document and an unrestricted Social Security card within 90 days.

When the employee provides an acceptable receipt, the employer should:

1. Record the document title in Section 2 under the sections titled List A, List B, or List C, as applicable.
2. Write the word "receipt" and its document number in the "Document Number" field. Record the last day that the receipt is valid in the "Expiration Date" field.

By the end of the receipt validity period, the employer should:

1. Cross out the word "receipt" and any accompanying document number and expiration date.
2. Record the number and other required document information from the actual document presented.
3. Initial and date the change.

See the *Handbook for Employers: Instructions for Completing Form I-9 (M-274)* at **www.uscis.gov/I-9Central** for more information on receipts.

Section 3. Reverification and Rehires

Employers or their authorized representatives should complete Section 3 when reverifying that an employee is authorized to work. When rehiring an employee within 3 years of the date Form I-9 was originally completed, employers have the option to complete a new Form I-9 or complete Section 3. When completing Section 3 in either a reverification or rehire situation, if the employee's name has changed, record the name change in Block A.

For employees who provide an employment authorization expiration date in Section 1, employers must reverify employment authorization on or before the date provided.

Some employees may write "N/A" in the space provided for the expiration date in Section 1 if they are aliens whose employment authorization does not expire (e.g., asylees, refugees, certain citizens of the Federated States of Micronesia, the Republic of the Marshall Islands, or Palau). Reverification does not apply for such employees unless they chose to present evidence of employment authorization in Section 2 that contains an expiration date and requires reverification, such as Form I-766, Employment Authorization Document.

Reverification applies if evidence of employment authorization (List A or List C document) presented in Section 2 expires. However, employers should not reverify:

1. U.S. citizens and noncitizen nationals; or
2. Lawful permanent residents who presented a Permanent Resident Card (Form I-551) for Section 2.

Reverification does not apply to List B documents.

If both Section 1 and Section 2 indicate expiration dates triggering the reverification requirement, the employer should reverify by the earlier date.

For reverification, an employee must present unexpired documentation from either List A or List C showing he or she is still authorized to work. Employers CANNOT require the employee to present a particular document from List A or List C. The employee may choose which document to present.

To complete Section 3, employers should follow these instructions:

1. Complete Block A if an employee's name has changed at the time you complete Section 3.
2. Complete Block B with the date of rehire if you rehire an employee within 3 years of the date this form was originally completed, and the employee is still authorized to be employed on the same basis as previously indicated on this form. Also complete the "Signature of Employer or Authorized Representative" block.
3. Complete Block C if:
   - **a.** The employment authorization or employment authorization document of a current employee is about to expire and requires reverification; or
   - **b.** You rehire an employee within 3 years of the date this form was originally completed and his or her employment authorization or employment authorization document has expired. (Complete Block B for this employee as well.)

   To complete Block C:
   - **a.** Examine either a List A or List C document the employee presents that shows that the employee is currently authorized to work in the United States; and
   - **b.** Record the document title, document number, and expiration date (if any).
4. After completing block A, B or C, complete the "Signature of Employer or Authorized Representative" block, including the date.

   For reverification purposes, employers may either complete Section 3 of a new Form I-9 or Section 3 of the previously completed Form I-9. Any new pages of Form I-9 completed during reverification must be attached to the employee's original Form I-9. If you choose to complete Section 3 of a new Form I-9, you may attach just the page containing Section 3, with the employee's name entered at the top of the page, to the employee's original Form I-9. If there is a more current version of Form I-9 at the time of reverification, you must complete Section 3 of that version of the form.

What Is the Filing Fee?

There is no fee for completing Form I-9. This form is not filed with USCIS or any government agency. Form I-9 must be retained by the employer and made available for inspection by U.S. Government officials as specified in the **"USCIS Privacy Act Statement"** below.

USCIS Forms and Information

For more detailed information about completing Form I-9, employers and employees should refer to the *Handbook for Employers: Instructions for Completing Form I-9 (M-274).*

You can also obtain information about Form I-9 from the USCIS Web site at www.uscis.gov/I-9Central, by e-mailing USCIS at **I-9Central@dhs.gov**, or by calling **1-888-464-4218**. For TDD (hearing impaired), call **1-877-875-6028**.

To obtain USCIS forms or the *Handbook for Employers*, you can download them from the USCIS Web site at www.uscis.gov/forms. You may order USCIS forms by calling our toll-free number at **1-800-870-3676**. You may also obtain forms and information by contacting the USCIS National Customer Service Center at **1-800-375-5283**. For TDD (hearing impaired), call **1-800-767-1833**.

Information about E-Verify, a free and voluntary program that allows participating employers to electronically verify the employment eligibility of their newly hired employees, can be obtained from the USCIS Web site at www.dhs.gov/E-Verify, by e-mailing USCIS at **E-Verify@dhs.gov** or by calling **1-888-464-4218**. For TDD (hearing impaired), call **1-877-875-6028.**

Employees with questions about Form I-9 and/or E-Verify can reach the USCIS employee hotline by calling **1-888-897-7781**. For TDD (hearing impaired), call **1-877-875-6028.**

Photocopying and Retaining Form I-9

A blank Form I-9 may be reproduced, provided all sides are copied. The instructions and Lists of Acceptable Documents must be available to all employees completing this form. Employers must retain each employee's completed Form I-9 for as long as the individual works for the employer. Employers are required to retain the pages of the form on which the employee and employer enter data. If copies of documentation presented by the employee are made, those copies must also be kept with the form. Once the individual's employment ends, the employer must retain this form for either 3 years after the date of hire or 1 year after the date employment ended, whichever is later.

Form I-9 may be signed and retained electronically, in compliance with Department of Homeland Security regulations at 8 CFR 274a.2.

USCIS Privacy Act Statement

AUTHORITIES: The authority for collecting this information is the Immigration Reform and Control Act of 1986, Public Law 99-603 (8 USC 1324a).

PURPOSE: This information is collected by employers to comply with the requirements of the Immigration Reform and Control Act of 1986. This law requires that employers verify the identity and employment authorization of individuals they hire for employment to preclude the unlawful hiring, or recruiting or referring for a fee, of aliens who are not authorized to work in the United States.

DISCLOSURE: Submission of the information required in this form is voluntary. However, failure of the employer to ensure proper completion of this form for each employee may result in the imposition of civil or criminal penalties. In addition, employing individuals knowing that they are unauthorized to work in the United States may subject the employer to civil and/or criminal penalties.

ROUTINE USES: This information will be used by employers as a record of their basis for determining eligibility of an employee to work in the United States. The employer will keep this form and make it available for inspection by authorized officials of the Department of Homeland Security, Department of Labor, and Office of Special Counsel for Immigration-Related Unfair Employment Practices.

Paperwork Reduction Act

An agency may not conduct or sponsor an information collection and a person is not required to respond to a collection of information unless it displays a currently valid OMB control number. The public reporting burden for this collection of information is estimated at 35 minutes per response, including the time for reviewing instructions and completing and retaining the form. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: U.S. Citizenship and Immigration Services, Regulatory Coordination Division, Office of Policy and Strategy, 20 Massachusetts Avenue NW, Washington, DC 20529-2140; OMB No. 1615-0047. **Do not mail your completed Form I-9 to this address.**

Employment Eligibility Verification

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
Expires 03/31/2016

▶**START HERE. Read instructions carefully before completing this form. The instructions must be available during completion of this form.**

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) they will accept from an employee. The refusal to hire an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation *(Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.)*

Last Name *(Family Name)*	First Name *(Given Name)*	Middle Initial	Other Names Used *(if any)*

Address *(Street Number and Name)*	Apt. Number	City or Town	State	Zip Code

Date of Birth *(mm/dd/yyyy)*	U.S. Social Security Number	E-mail Address	Telephone Number
	- -		

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following):

☐ A citizen of the United States

☐ A noncitizen national of the United States *(See instructions)*

☐ A lawful permanent resident (Alien Registration Number/USCIS Number): ____________

☐ An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy) ____________. Some aliens may write "N/A" in this field. *(See instructions)*

*For aliens authorized to work, provide your Alien Registration Number/USCIS Number **OR** Form I-94 Admission Number:*

1. Alien Registration Number/USCIS Number: ____________

OR

2. Form I-94 Admission Number: ____________

If you obtained your admission number from CBP in connection with your arrival in the United States, include the following:

Foreign Passport Number: ____________

Country of Issuance: ____________

Some aliens may write "N/A" on the Foreign Passport Number and Country of Issuance fields. (*See instructions*)

3-D Barcode
Do Not Write in This Space

Signature of Employee:	Date *(mm/dd/yyyy)*:

Preparer and/or Translator Certification *(To be completed and signed if Section 1 is prepared by a person other than the employee.)*

I attest, under penalty of perjury, that I have assisted in the completion of this form and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator:	Date *(mm/dd/yyyy)*:

Last Name *(Family Name)*	First Name *(Given Name)*

Address *(Street Number and Name)*	City or Town	State	Zip Code

STOP ***Employer Completes Next Page*** STOP

Section 2. Employer or Authorized Representative Review and Verification

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR examine a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents" on the next page of this form. For each document you review, record the following information: document title, issuing authority, document number, and expiration date, if any.)

Employee Last Name, First Name and Middle Initial from Section 1:

List A Identity and Employment Authorization	OR	List B Identity	AND	List C Employment Authorization
Document Title:		Document Title:		Document Title:
Issuing Authority:		Issuing Authority:		Issuing Authority:
Document Number:		Document Number:		Document Number:
Expiration Date *(if any)(mm/dd/yyyy)*:		Expiration Date *(if any)(mm/dd/yyyy)*:		Expiration Date *(if any)(mm/dd/yyyy)*:
Document Title:				
Issuing Authority:				
Document Number:				
Expiration Date *(if any)(mm/dd/yyyy)*:				3-D Barcode Do Not Write in This Space
Document Title:				
Issuing Authority:				
Document Number:				
Expiration Date *(if any)(mm/dd/yyyy)*:				

Certification

I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment *(mm/dd/yyyy)*: _______________ ***(See instructions for exemptions.)***

Signature of Employer or Authorized Representative	Date *(mm/dd/yyyy)*	Title of Employer or Authorized Representative	
Last Name *(Family Name)*	First Name *(Given Name)*	Employer's Business or Organization Name	
Employer's Business or Organization Address *(Street Number and Name)*	City or Town	State	Zip Code

Section 3. Reverification and Rehires *(To be completed and signed by employer or authorized representative.)*

A. New Name *(if applicable)* Last Name *(Family Name)* First Name *(Given Name)* Middle Initial	B. Date of Rehire *(if applicable) (mm/dd/yyyy)*:

C. If employee's previous grant of employment authorization has expired, provide the information for the document from List A or List C the employee presented that establishes current employment authorization in the space provided below.

Document Title:	Document Number:	Expiration Date *(if any)(mm/dd/yyyy)*:

I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

Signature of Employer or Authorized Representative:	Date *(mm/dd/yyyy)*:	Print Name of Employer or Authorized Representative:

LISTS OF ACCEPTABLE DOCUMENTS
All documents must be UNEXPIRED

Employees may present one selection from List A
or a combination of one selection from List B and one selection from List C.

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity	AND	LIST C Documents that Establish Employment Authorization
1. U.S. Passport or U.S. Passport Card **2.** Permanent Resident Card or Alien Registration Receipt Card (Form I-551) **3.** Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa **4.** Employment Authorization Document that contains a photograph (Form I-766) **5.** For a nonimmigrant alien authorized to work for a specific employer because of his or her status: **a.** Foreign passport; and **b.** Form I-94 or Form I-94A that has the following: (1) The same name as the passport; and (2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form. **6.** Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI		**1.** Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address **2.** ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address **3.** School ID card with a photograph **4.** Voter's registration card **5.** U.S. Military card or draft record **6.** Military dependent's ID card **7.** U.S. Coast Guard Merchant Mariner Card **8.** Native American tribal document **9.** Driver's license issued by a Canadian government authority **For persons under age 18 who are unable to present a document listed above:** **10.** School record or report card **11.** Clinic, doctor, or hospital record **12.** Day-care or nursery school record		**1.** A Social Security Account Number card, unless the card includes one of the following restrictions: (1) NOT VALID FOR EMPLOYMENT (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION **2.** Certification of Birth Abroad issued by the Department of State (Form FS-545) **3.** Certification of Report of Birth issued by the Department of State (Form DS-1350) **4.** Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal **5.** Native American tribal document **6.** U.S. Citizen ID Card (Form I-197) **7.** Identification Card for Use of Resident Citizen in the United States (Form I-179) **8.** Employment authorization document issued by the Department of Homeland Security

Illustrations of many of these documents appear in Part 8 of the Handbook for Employers (M-274).

Refer to Section 2 of the instructions, titled "Employer or Authorized Representative Review and Verification," for more information about acceptable receipts.

HANDLING E-VERIFY ISSUES

E-VERIFY STATUS	DESCRIPTION	STATUS IS HANDLED BY	ACTION REQUIRED
Authorized	This response means that the employee is authorized to work in the United States. Employment Authorized is the most common initial response received from E-Verify.	**S/C/D / Client Services**	http://www.hr.wayne.edu/esc/docs/case_closure_-_options.pdf
Employment Authorized with additional verification that can be requested by the employer	This response from E-Verify indicates that the employee has been determined to be Employment Authorized. However, the DHS can perform a more in-depth verification on this employee. The decision to request an additional verification is at the discretion of the employer.	**S/C/D / Client Services**	Review the reason for the additional verification and follow the necessary steps. Users may contact ESC if there are any questions about whether additional verification should be requested.
SSA Incomplete **DHS Incomplete**	This response indicates there are minor discrepancies in the data submitted and the data on record for the employee at SSA or DHS. This status allows the I-9 representative the chance to review/edit the data to confirm accuracy. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	**S/C/D / Client Services**	http://www.hr.wayne.edu/esc/docs/how_to_handle_a_ssa-dhs_incomplete.pdf
An error has occurred *(REASON HERE)*	This response may result from an invalid entry (may be an invalid field format) when completing Section 2 of the I-9. NOTE: The employee MUST be allowed to continue to work until the case is resolved.	**S/C/D / Client Services**	Review the reason for the error and follow the necessary steps in order to process an accurate I-9 for the employee.
SSA TNC **DHS TNC**	A TNC response means that the Social Security Administration (SSA) and/or the U.S. Department of Homeland Security (DHS) could not confirm that the employee's information matches government records. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	Initially, **S/C/D** – to review I-9 and ensure there are no data entry errors If there are no data entry errors, employee **MUST** be referred to **Client Services** to handle TNC response	http://www.hr.wayne.edu/esc/docs/how_to_handle_a_ssa_or_dhs_tentative_nonconfirmationtnc_.pdf
SSA No Show **DHS No Show**	This response indicates that the employee did not contact SSA or DHS, and 10 Federal government workdays have passed since the date of referral. This response is considered a Final Nonconfirmation, and if received, the Employer should resolve the case. Also, the Employer may now terminate employment with no civil or criminal liability.	**S/C/D / Client Services**	S/C/D **MUST** contact Client Services for further instructions.
SSA Final Nonconfirmation **DHS Final Nonconfirmation**	This response indicates that DHS and/or SSA could not verify the employee's eligibility to work in the United States. This response also occurs when an employee fails to contact SSA or DHS after receiving a tentative non-confirmation. NOTE: S/C/D MUST contact Client Services for further instructions	**S/C/D / Client Services**	S/C/D **MUST** contact Client Services for further instructions.
Photo Matching	Process that requires us to verify that the photo displayed in E-Verify is identical to the photo on the document that the employee presented for section 2 of Form I-9. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	**Client Services**	Client Services handles the photo matching process.
Referred to SSA **Referred to DHS**	This response indicates that the employee has been referred to SSA or DHS to resolve tentative nonconfirmation findings. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	**Client Services**	Client Services checks I-9 eXpress daily for updated results.
SSA Case in Continuance **DHS Case in Continuance**	This response indicates that the employee has contacted DHS or SSA to resolve a tentative non-confirmation but the agency needs more time to resolve the problem. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	**Client Services**	Client Services checks I-9 eXpress daily for updated results.
Employment Authorized – With Additional Verification Requested Automatically	This response indicates that the employee has been determined to be Employment Authorized. However, the DHS can perform a more in-depth verification on this employee. The additional verification is automatically requested and no additional action is required. The status will be updated to "DHS Verification in Process". The DHS will respond within three government work days. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	**N/A**	**No action required.** DHS will respond within 3 government business days.

I-9 eXpress

HANDLING E-VERIFY ISSUES

WAYNE STATE UNIVERSITY

E-VERIFY STATUS	DESCRIPTION	STATUS IS HANDLED BY	ACTION REQUIRED
DHS Verification in Process	This response means a definitive answer is not yet available. DHS responds to most of these cases within 24 hours, but has up to three government business days to respond. *NOTE: The employee MUST be allowed to continue to work until the case is resolved.*	**N/A**	**No action required.** DHS will respond within 3 government business days.

I-9 eXpress

WAYNE STATE

When to complete a New I-9

1) Hiring a new employee to the University.

2) A break in service (at least 1 day) occurred for an employee, and the most recent I-9 was completed **more** than 3 years prior to resuming work.

   Note: Full time employees who are paid on the 9-Month calendar, and do not have an additional service assignment during the summer, are **not** considered to have had a break in service during the summer.

3) A break in service (at least 1 day) occurred for an employee, and the most recent I-9 was completed **less** than 3 years. However, the I-9 shows that the individual is no longer eligible to work in the United States (work authorization has expired).

4) Employee is grand-fathered (I-9 completed prior to November 6, 1986), but now has a break in service (at least 1 day).

5) A new immigration status is issued for a foreign national employee.

6) A foreign national's I-9 is due for re-verification on an expired work authorization and the original I-9 was **NOT** created in I-9 eXpress.

7) An invalid query/data entry error was discovered after completing the I-9 in I-9 eXpress.

Examples of when to complete a new I-9 for a 9 Month Faculty/9 Month Graduate Students, Temporary employees and Part Time Faculty

9 Month Faculty / 9 Month Academic Staff / 9 Month Research /9 Month Graduate Students (A9, C9, D9, F9, R9, S9, U9):

Completed I-9	Worked During the Following:	Did not work during the following:	Returned to University	Should a new I-9 be completed?
8/15/2006	2006 8/17/06 – 5/17/07	Summer '07	Fall '07	No
	2007 8/17/07 – 5/17/08	Summer '08	Fall '08	No
	2008 8/17/08 – 5/17/09	Summer '09	Fall '09	No
	2009 8/17/09 - 5/17/10	Academic year 2010 8/17/10 – 5/17/11	Academic year 2011 8/17/11	Yes

I-9 eXpress

When to complete a New I-9

Temporary (CW, ST, TE)

Completed I-9	Worked During the Following:	Did not work during the following:	Returned to University	Should a new I-9 be completed?
8/15/2006	8/15/2006 – 8/15/2009	8/16/2009 –12/31/2009	1/1/2010	**Yes**
8/15/2006	8/15/2006 – 8/15/2007	8/16/2007 – 12/31/2007	1/1/2008	**No**

Part-Time Faculty (PT, P5, HP)

Completed I-9	Worked During the Following:	Did not work during the following:	Returned to University	Should a new I-9 be completed?
8/15/2006	<u>2006</u> Fall '06, <u>2007</u> Winter '07, Spring '07 Summer '07,Fall '07 <u>2008</u> Winter '08, Spring '08, Summer '08, Fall '08 <u>2009</u> Winter '09, Spring '09, Summer '09, Fall '09	Winter '10	Spring '10	**Yes**
8/15/2006	<u>2006</u> Fall '06, <u>2007</u> Winter '07, Spring '07 Summer '07,Fall '07	Winter '08 Spring '08	Summer '08	**No**

E-VERIFY RESPONSES / CURRENT STATUSES

THE INITIAL ELIGIBILITY STATEMENT WILL BE ONE OF THE FOLLOWING RESPONSES:

- **EMPLOYMENT AUTHORIZED:** A response received from either the Social Security Administration (SSA) or the Department of Homeland Security (DHS) indicating the information provided by the Employer matched the information contained in the database(s) and work eligibility has been confirmed.

- **TENTATIVE NONCONFIRMATION (TNC):**

  - **SSA TNC:** This response indicates that the employee's Social Security information could not be verified. The employee must be notified of the TNC response and referred to SSA if he or she contests the SSA TNC. *(See the "E-verify Process" document I:\Employment\I-9eXpress).*

  - **DHS TNC:** This response indicates that employment eligibility could not be verified; therefore the employee must be notified of the response and referred to DHS if he or she contests the DHS TNC. *(See the "E-verify Process" document I:\Employment\I-9eXpress).*

    ******REMEMBER****- *You may not take adverse action against the employee based on a TNC until it is resolved. This response does **NOT** indicate the employee is not authorized to work.*

- **FINAL NONCONFIRMATION:**
  If an employee's work eligibility cannot be confirmed, you will receive a Final Nonconfirmation response from the Social Security Administration or the Department of Homeland Security. Receiving a Final Nonconfirmation response may terminate the employment of the employee and shall not be civilly or criminally liable under any law for the termination, as long as the action was taken in good faith reliance of the information provided through the E-Verify system.

A SSA REFERRAL COULD HAVE THE FOLLOWING RESPONSES:

- **EMPLOYMENT AUTHORIZED:** This response indicates that employment eligibility is verified. You should resolve the case, ending the verification process.

- **SSA CASE IN CONTINUANCE (this is rare):** This response indicates that the employee has visited SSA, but that SSA needs more than 10 federal government workdays to confirm employment eligibility. Check the system daily to see if the case status has been updated with any of the other responses listed on this page. You must wait until SSA provides a definitive response before moving forward or resolving the case, and you **may not** terminate or take adverse action against the employee **unless** E-Verify returns a response of **SSA FINAL NONCONFIRMATION** (or **DHS EMPLOYMENT UNAUTHORIZED** or **DHS NO SHOW**

- **SSA FINAL NONCONFIRMATION:** This indicates that the SSA could not verify the furnished information. You should resolve the case, ending the verification process.

DHS VERIFICATION IN PROCESS

This response indicates that the non-citizen's information provided to SSA matches the information contained in SSA records. The case is then referred to DHS for employment eligibility verification. DHS responds to most of these cases within 24 hours, although DHS is permitted up to three (3) Federal government workdays in which to respond. You should check the system daily for a response.

A "DHS VERIFICATION IN PROCESS" COULD HAVE THE FOLLOWING RESPONSES:

- **EMPLOYMENT AUTHORIZED**: This response indicates that employment eligibility is verified and the case can be resolved.

- **CASE IN CONTINUANCE:** This response indicates that DHS needs more than 10 Federal government workdays to resolve employment eligibility. You must wait until DHS provides a definitive response before resolving the case.

- **DHS TNC:** This response indicates that employment eligibility could not be verified; therefore the employee must be notified of the response and referred to DHS if he or she contests the DHS TNC. *(See the "E-verify Process" document I:\Employment\I-9eXpress).*

A DHS REFERRAL COULD HAVE THE FOLLOWING RESPONSES:

E-Verify will provide one of the following responses, depending on whether the employee contacts DHS:

- **EMPLOYMENT AUTHORIZED**: This response indicates that the employee contacted DHS and is authorized to work. The case should be resolved in E-Verify.

- **DHS EMPLOYMENT UNAUTHORIZED**: This response indicates that the employee contacted DHS and is not authorized to work. The employee's case should be resolved within E-Verify. Also, you may now terminate the employee's employment with no civil or criminal liability.

DHS NO SHOW: This response indicates that the employee did not contact DHS, and 10 Federal government workdays have passed since the date of referral. **This response is considered a Final Nonconfirmation**, and if received, the Employer should resolve the case. Also, the Employer may now terminate employment with no civil or criminal liability.

This response indicates that DHS and/or SSA could not verify the employee's eligibility to work in the United States. This response also occurs when an employee fails to contact SSA or DHS after recei

•

THE CURRENT I-9 IS NOT ELIGIBLE FOR VERIFICATION THROUGH E-VERIFY: You will receive this response when completing an I-9 for the employee without the employee's social security number. The system places the form in the SSN Applied For category. Refer to "SSN Applied For" session in Form-I-9 Lesson 2: I-9 eXpress in Blackboard.

SSA OR **DHS CASE INCOMPLETE:** if there are minor discrepancies in the data submitted and the data on record for the employee at SSA or DHS. This status allows the I-9 representative the chance to review/edit the data to confirm accuracy.

PASSPORT DATA VERIFIED

The new status **Passport Data Verified** may occur after a DHS Referral. When a case is in the **Passport Data Verified** status, there is nothing for the employer or employee to do. This is not an "actionable" status; the employer is waiting for E-Verify to update the case to a new status. Typically a case with the **Passport Data Verified** status will be updated to Photo Match status. This prompts the employer to perform the E-Verify Photo Match process with the employee.

Note: If the employer indicates that the photo does not match, the case will update to the DHS TNC status. This would lead to a 2nd DHS TNC for the employee, since they have ready encountered a DHS TNC before receiving the **Passport Data Verified** status.

CLOSE AND RESUBMIT CASE

The new status **Close and Resubmit Case** may occur after a DHS Referral. When a case has the status **Close and Resubmit Case** the only option for employers is to close the case. The user should close the case by selecting the appropriate E-Verify closure option and complete a new I-9 to open another case within E-Verify.

While it is not entirely clear what circumstances cause the **Close and Resubmit Case** status to be returned by E-Verify, it appears that it will occur infrequently. In most situations, the status may be returned from E-Verify when connection to DHS for the case has been lost. Closing and then creating a new case will re-engage the verification of the employee eligibility to work in the United States.

I-9 eXpress

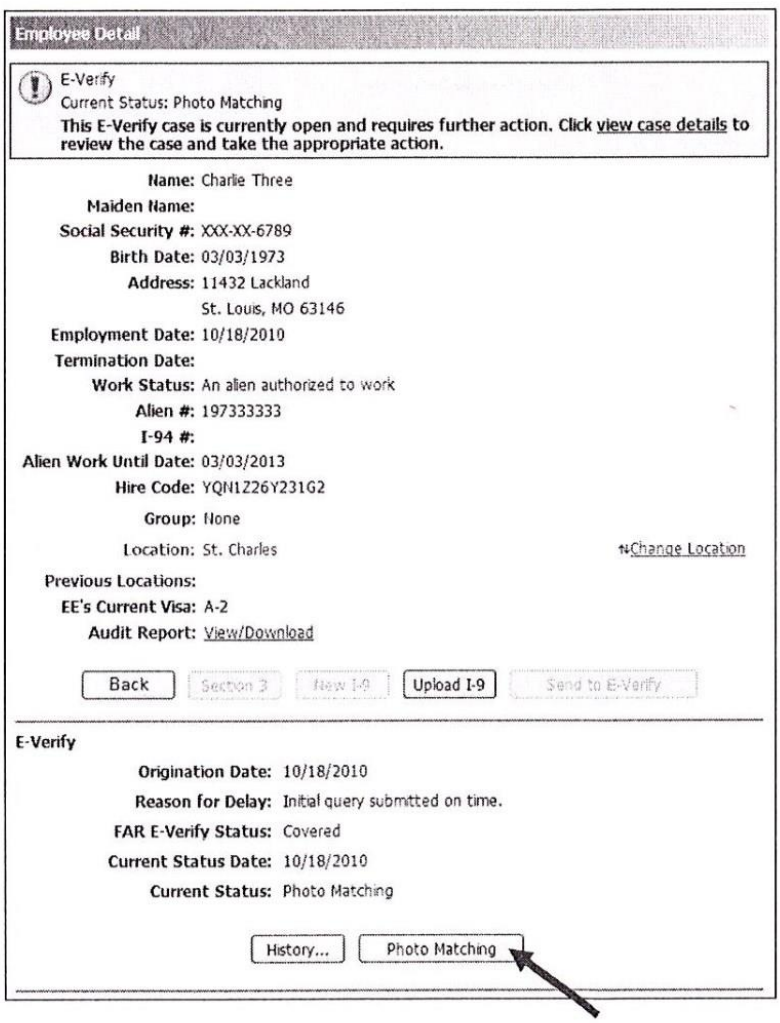
E-Verify Photo Matching

- **Photo Matching** is an E-Verify tatus regarding the E-Verify Photo Matching tool.
- The status of **Photo Matching** may be returned as an initial response by E-Verify.
- The **Photo Matching** status requires you to compare the photograph on the employee's Section 2 document to the picture displayed by E-Verify.
- You must then indicate if the photograph on the employee's document matches the photograph displayed by E-Verify. The documents included in the Photo Matching tool are **U.S. Passport or Passport Card, I-766 (Employment Authorization Document) and I-551 (Permanent Resident Card)**.

Photo Matching Scenario #1 (Photograph matches)

The employee presents a U.S. Passport or Passport Card, I-766 or I-551 document for their Form I-9. The initial response of **Photo Matching** is returned.

- To complete the photo match, click the **Photo Matching** button.


Employee Detail

E-Verify
Current Status: Photo Matching
This E-Verify case is currently open and requires further action. Click view case details to review the case and take the appropriate action.

Name: Charlie Three
Maiden Name:
Social Security #: XXX-XX-6789
Birth Date: 03/03/1973
Address: 11432 Lackland
St. Louis, MO 63146
Employment Date: 10/18/2010
Termination Date:
Work Status: An alien authorized to work
Alien #: 197333333
I-94 #:
Alien Work Until Date: 03/03/2013
Hire Code: YQN1Z26Y231G2
Group: None
Location: St. Charles
Change Location
Previous Locations:
EE's Current Visa: A-2
Audit Report: View/Download

Back | Section 3 | New I-9 | Upload I-9 | Send to E-Verify

E-Verify
Origination Date: 10/18/2010
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Current Status Date: 10/18/2010
Current Status: Photo Matching

History... | Photo Matching

I-9 eXpress

E-Verify Photo Matching

Clicking this button takes the user to the E-Verify History page where the photograph that should be on the employee's document is displayed.

E-Verify History - Case Number: 2010291173212XH

Initial Verification (10/18/2010)

Name: Charlie Three
Social security #: XXX-XX-6789
Birth date: 03/03/1973
Employment date: 10/18/2010
Work Status: An alien authorized to work
Alien #: 197333333
I-94 #:
Passport #:
Visa #:
Document Type: Form I-766 - Employment Authorization Document that contains a photograph
Document #: ABC1234567890
Document Expiration Date: 03/03/2013
Initiated By: John Smith
E-Verify Company ID Number: 11457
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name:
Status: DHS Case Incomplete

DHS Reverification (10/18/2010)

Alien Number: 197333333
Document Number: CTV2103031973
Initiated By: John Smith
Status: Photo Matching

E-Verify Photo Matching

You **MUST** compare the photo below to the photo on the Form I-766 - Employment Authorization Document that contains a photograph presented by the employee. Do **NOT** compare the photo below from E-Verify to the employee directly.

Does the photo below match the photo on the Form I-766 - Employment Authorization Document that contains a photograph presented by the Employee?

Click to Enlarge

○ Yes. The photographs are the same.
○ No. The photographs are different.

IMPORTANT! Make sure your selection above is correct. Then, click the **Continue** button below to confirm your response with E-Verify.

IMPORTANT! You **MUST** retain a copy of the employee's Form I-766 - Employment Authorization Document that contains a photograph. To comply with this Federal government requirement you may either:

1. Scan the document and attach the image to the employee's electronic Form I-9 by clicking the Attach File action in the I-9 History Section on the Employee Detail page, **OR**
2. Copy the document and retain the hardcopy in a separate file. If you retain a hardcopy, use the Comment feature on the Employee Detail page to note that the hardcopy is being retained in a separate file.

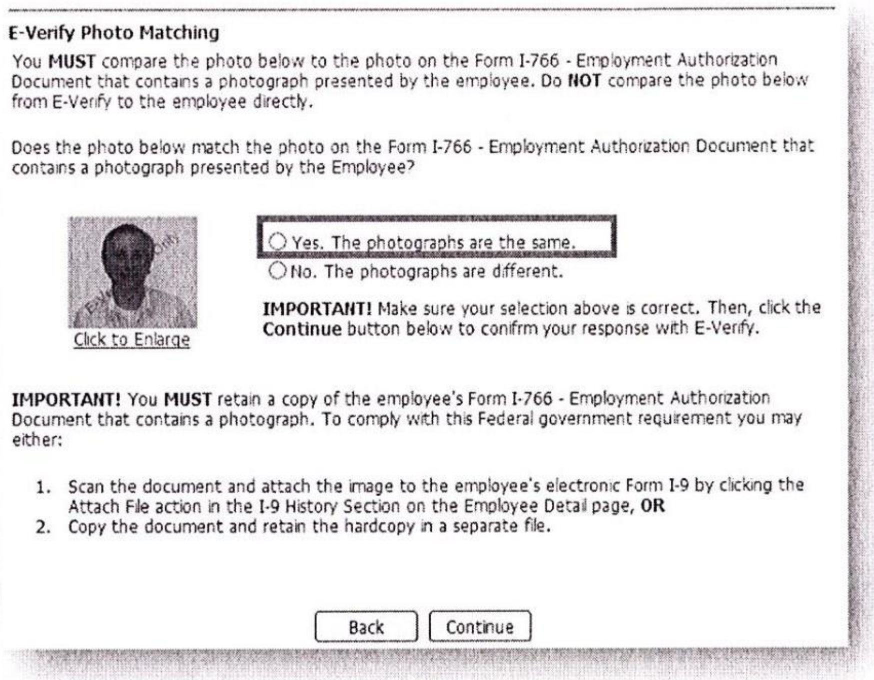
[Back] [Continue]

Instructions are displayed for the user explaining what they must do to indicate that the photographs do or do not match.

I-9 eXpress

E-Verify Photo Matching

If you Click "Yes. The photographs are the same" to confirm that the photo on the employee's document matches the photo returned by E-Verify.



E-Verify Photo Matching

You **MUST** compare the photo below to the photo on the Form I-766 - Employment Authorization Document that contains a photograph presented by the employee. Do **NOT** compare the photo below from E-Verify to the employee directly.

Does the photo below match the photo on the Form I-766 - Employment Authorization Document that contains a photograph presented by the Employee?

Click to Enlarge

○ Yes. The photographs are the same.
○ No. The photographs are different.

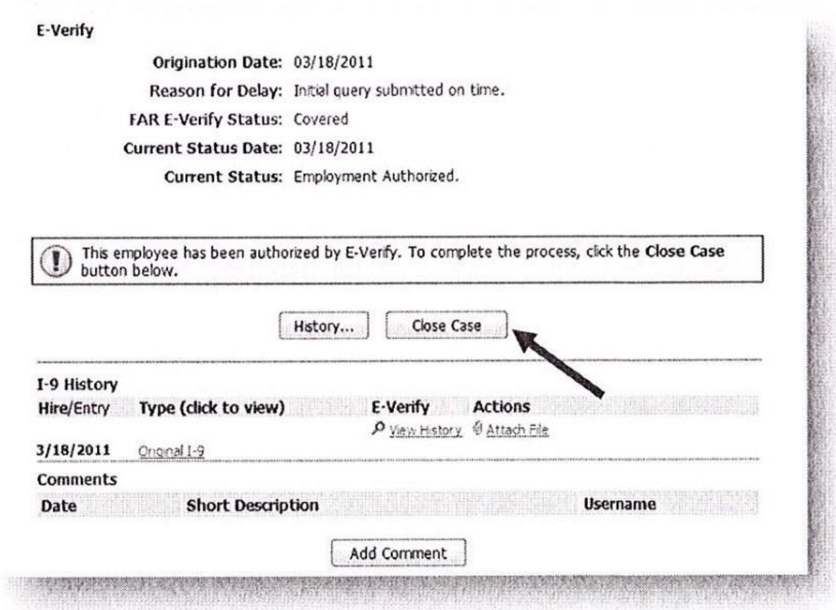
IMPORTANT! Make sure your selection above is correct. Then, click the **Continue** button below to confirm your response with E-Verify.

IMPORTANT! You **MUST** retain a copy of the employee's Form I-766 - Employment Authorization Document that contains a photograph. To comply with this Federal government requirement you may either:

1. Scan the document and attach the image to the employee's electronic Form I-9 by clicking the Attach File action in the I-9 History Section on the Employee Detail page, **OR**
2. Copy the document and retain the hardcopy in a separate file.

Back | Continue

E-Verify will then update the case status to **Employment Authorized** and you can close the case



E-Verify

Origination Date: 03/18/2011
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Current Status Date: 03/18/2011
Current Status: Employment Authorized.

This employee has been authorized by E-Verify. To complete the process, click the **Close Case** button below.

History... | Close Case

I-9 History

Hire/Entry	Type (click to view)	E-Verify	Actions
		View History	Attach File
3/18/2011	Original I-9		

Comments

Date	Short Description	Username

Add Comment

- The default option is *'The employee continues to work after receiving an Employment Authorized result'.* If this is the correct response, click the Close Case button.

- Click **Close Case**

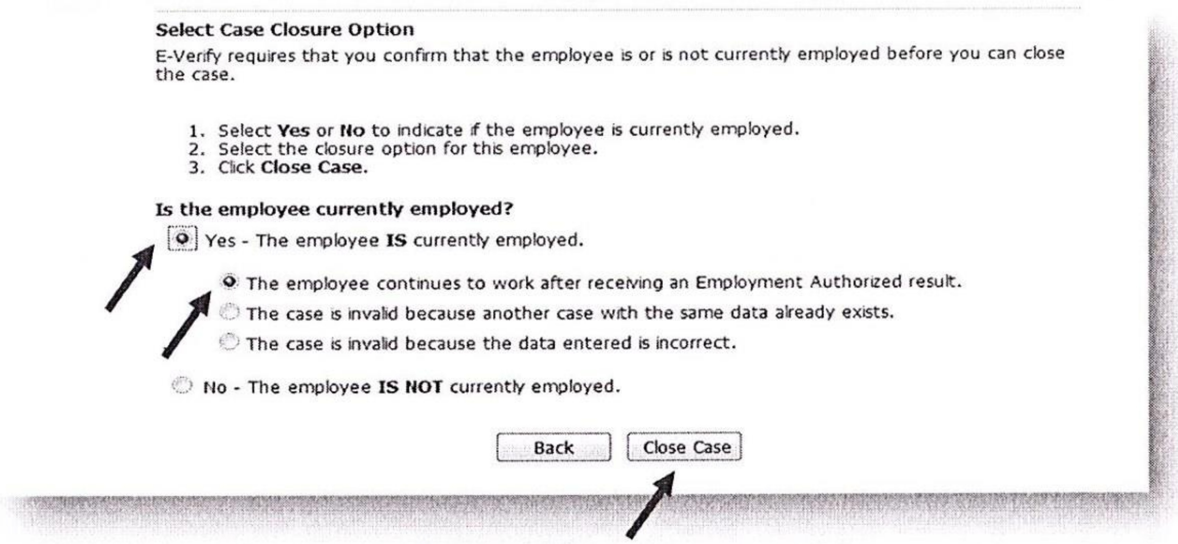


Photo Matching Scenario # 2 (Photograph do not match – Employee Contests)

If you Click "No. The photographs are different" to indicate that the photo on the employee's document does not match the photo returned by E-Verify. E-Verify will then update the case status to **DHS Tentative Nonconfirmation**.

Below is an illustration of the process users if a photo match tool document is presented, the User indicates that the photo on the employee document **does NOT match** the photograph displayed in the Photo Tool, **AND** the employee chooses to Contest the E-Verify results.

I-9 eXpress

E-Verify Photo Matching

E-Verify Photo Matching

You **MUST** compare the photo below to the photo on the Form I-766 - Employment Authorization Document that contains a photograph presented by the employee. Do **NOT** compare the photo below from E-Verify to the employee directly.

Does the photo below match the photo on the Form I-766 - Employment Authorization Document that contains a photograph presented by the Employee?

Click to Enlarge

○ Yes. The photographs are the same.

○ No. The photographs are different.

IMPORTANT! Make sure your selection above is correct. Then, click the **Continue** button below to confirm your response with E-Verify.

IMPORTANT! You **MUST** retain a copy of the employee's Form I-766 - Employment Authorization Document that contains a photograph. To comply with this Federal government requirement you may either:

1. Scan the document and attach the image to the employee's electronic Form I-9 by clicking the Attach File action in the I-9 History Section on the Employee Detail page, **OR**
2. Copy the document and retain the hardcopy in a separate file.

[Back] [Continue]

1. A message is displayed informing the User that a hardcopy of the employee's document should be retained (based on the employer's configuration to retain hardcopy, electronic copy or either). The User should click the checkbox to confirm that the copy has been retained.

DHS Reverification (10/18/2010)
Alien Number: 197333333
Document Number: CTV2103031973
Initiated By: John Smith
Status: Photo Matching

Photo Matching (10/26/2010)
Status: Photos did not match
Initiated By: John Smith
Copy Retained: No
Status: DHS Tentative Nonconfirmation.

IMPORTANT! For a case with Photo Matching you MUST retain a copy of the employee's document.
Copy the document and retain the hardcopy in a separate file. Use the Comment feature on the Employee Detail page to note that the hardcopy is being retained in a separate file.

☐ A hardcopy of the employee's document has been made and retained.

[Update status]

ACTION REQUIRED!

The Tentative Nonconfirmation Notices on this page are for informational purposes only. They are only provided to help the employee decide to contest or not contest the E-Verify results. When the employee makes their decision you MUST click on the appropriate button below. After clicking the appropriate button you MUST follow the steps listed on the E-Verify History page to actually refer the employee to SSA or DHS to close this Tentative Nonconfirmation. You MUST print the E-Verify documents on the E-Verify History page and provide copies to the employee.

View DHS Tentative Nonconfirmation Notice
View DHS Tentative Nonconfirmation Notice (Español)

[Back] [Contest] [Not Contest] [Close Case]

2. Click the appropriate Contest/Not Contest option. If the employee has elected to Contest, click the **Contest** button.
3. You will then be taken into the Contest wizard to follow the steps to process the Contest and refer the employee.

DHS Referral - Case Number: 2010291173212XH

Verify Information — Print Notice — Refer Employee — Print Letter — Complete

Verify Case Information

Verify case information below and click Continue.

Initial Verification (10/18/2010)

Name:	Charlie Three
Social security #:	XXX-XX-6789
Birth date:	03/03/1973
Employment date:	10/18/2010
Work Status:	An alien authorized to work
Alien #:	197333333
I-94 #:	
Passport #:	
Visa #:	
Document Type:	Form I-766 - Employment Authorization Document that contains a photograph
Document #:	ABC1234567890
Document Expiration Date:	03/03/2013
Initiated By:	John Smith
E-Verify Company ID Number:	11457
Reason for Delay:	Initial query submitted on time.
FAR E-Verify Status:	Covered
Return Name:	
Status:	DHS Case Incomplete

Cancel | Continue

I-9 eXpress

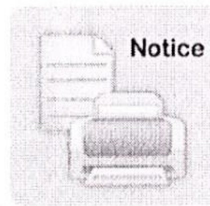
E-Verify Photo Matching

DHS Referral - Case Number: 2010291173212XH

Verify Information — Print Notice — Refer Employee — Print Letter — Complete

Print Notice & Give to Employee

1. Print the DHS Tentative Nonconfirmation Notice (TNC).
2. Review the DHS TNC privately with the employee.
3. Confirm you have given the employee a printed copy of the DHS TNC Notice.
   ☐ *I have notified the employee and given them a printed copy of the DHS TNC Notice.*
4. After these steps are complete, click the **Continue** button below.



DHS Tentative Nonconfirmation Notice (English)
DHS Tentative Nonconfirmation Notice (Español)

[Back] [Cancel] [Continue]

DHS Referral - Case Number: 2010291173212XH

Verify Information — Print Notice — Refer Employee — Print Letter — Complete

Refer Employee

The next step is to refer the employee to the DHS.

To refer the employee to the DHS click **Refer Case**

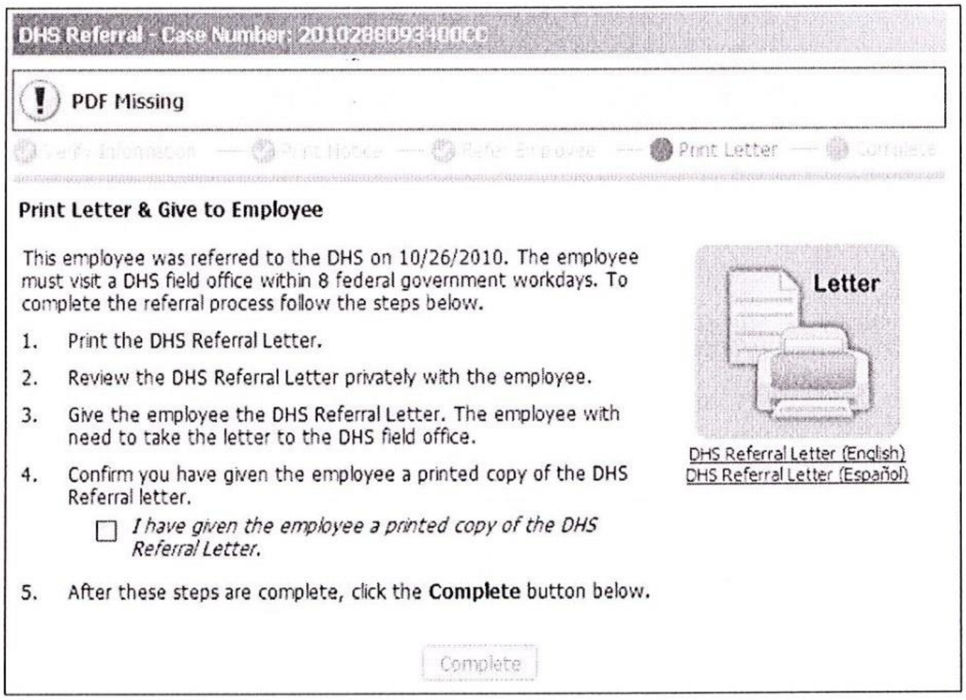
After clicking **Refer Case**, the employee has 8 federal government workdays to visit the DHS.

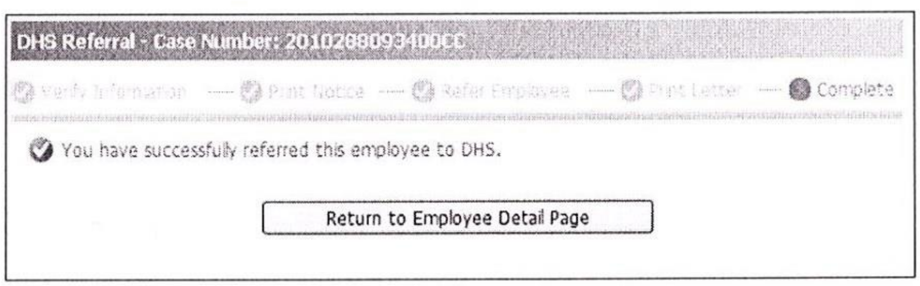
[Back] [Cancel] [Refer Case]

Note: the message on this page indicates that the User has not confirmed the hardcopy document has been retained.

I-9 eXpress

E-Verify Photo Matching

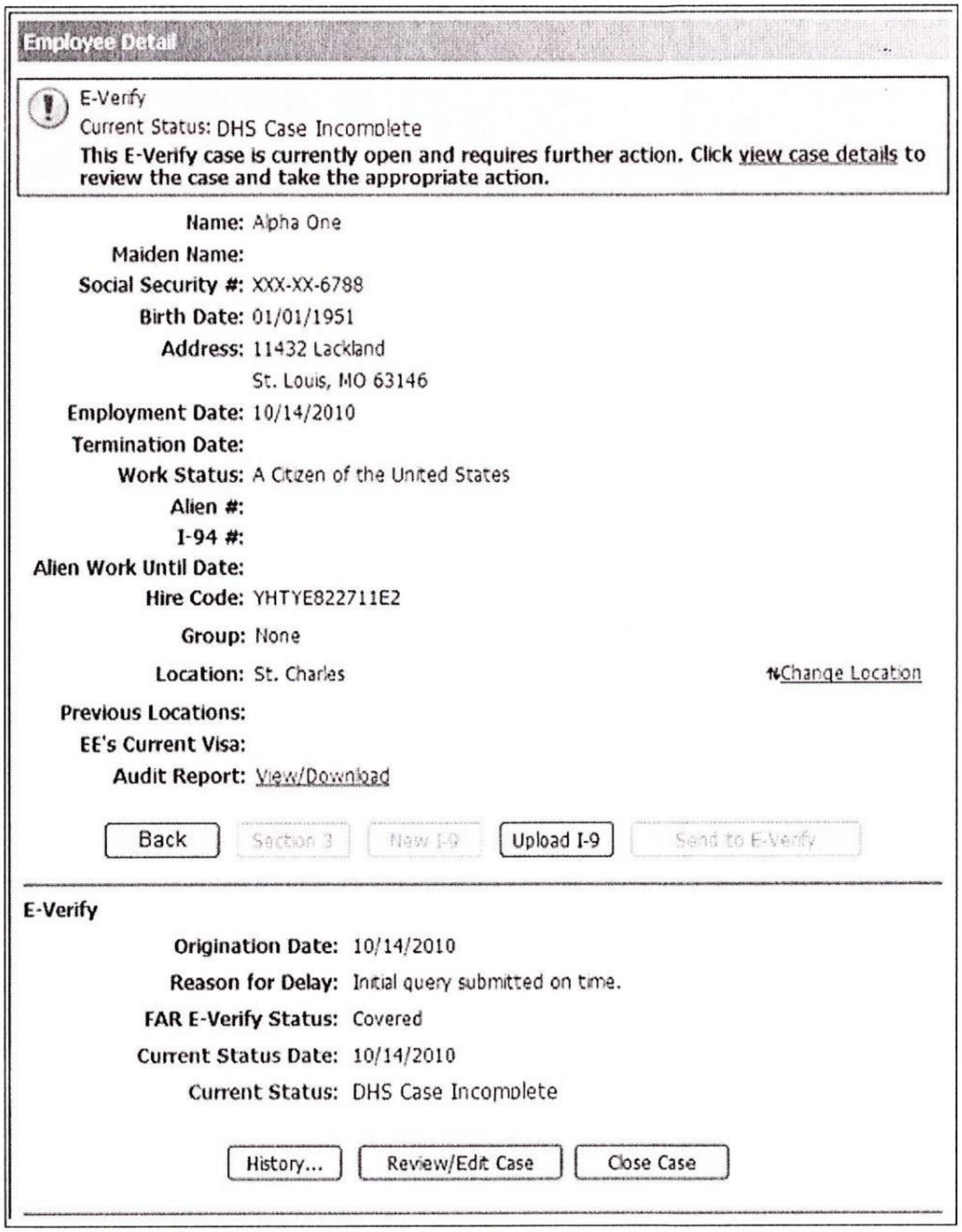




Screenshot: Employee Detail page

I-9 eXpress

E-Verify Photo Matching



Employee Detail

E-Verify
Current Status: DHS Case Incomplete
This E-Verify case is currently open and requires further action. Click view case details to review the case and take the appropriate action.

Name:	Alpha One
Maiden Name:	
Social Security #:	XXX-XX-6788
Birth Date:	01/01/1951
Address:	11432 Lackland St. Louis, MO 63146
Employment Date:	10/14/2010
Termination Date:	
Work Status:	A Citizen of the United States
Alien #:	
I-94 #:	
Alien Work Until Date:	
Hire Code:	YHTYE822711E2
Group:	None
Location:	St. Charles — Change Location
Previous Locations:	
EE's Current Visa:	
Audit Report:	View/Download

Back | Section 3 | New I-9 | Upload I-9 | Send to E-Verify

E-Verify

Origination Date:	10/14/2010
Reason for Delay:	Initial query submitted on time.
FAR E-Verify Status:	Covered
Current Status Date:	10/14/2010
Current Status:	DHS Case Incomplete

History... | Review/Edit Case | Close Case

When E-Verify returns the status of **DHS Case Incomplete** for U.S Passport, you can click the **Review/Edit Case** button to review the data submitted to E-Verify.

For instructions of a Case Incomplete, refer to the **"How to handle a SSA-DHS Case Incomplete"** Job aid.

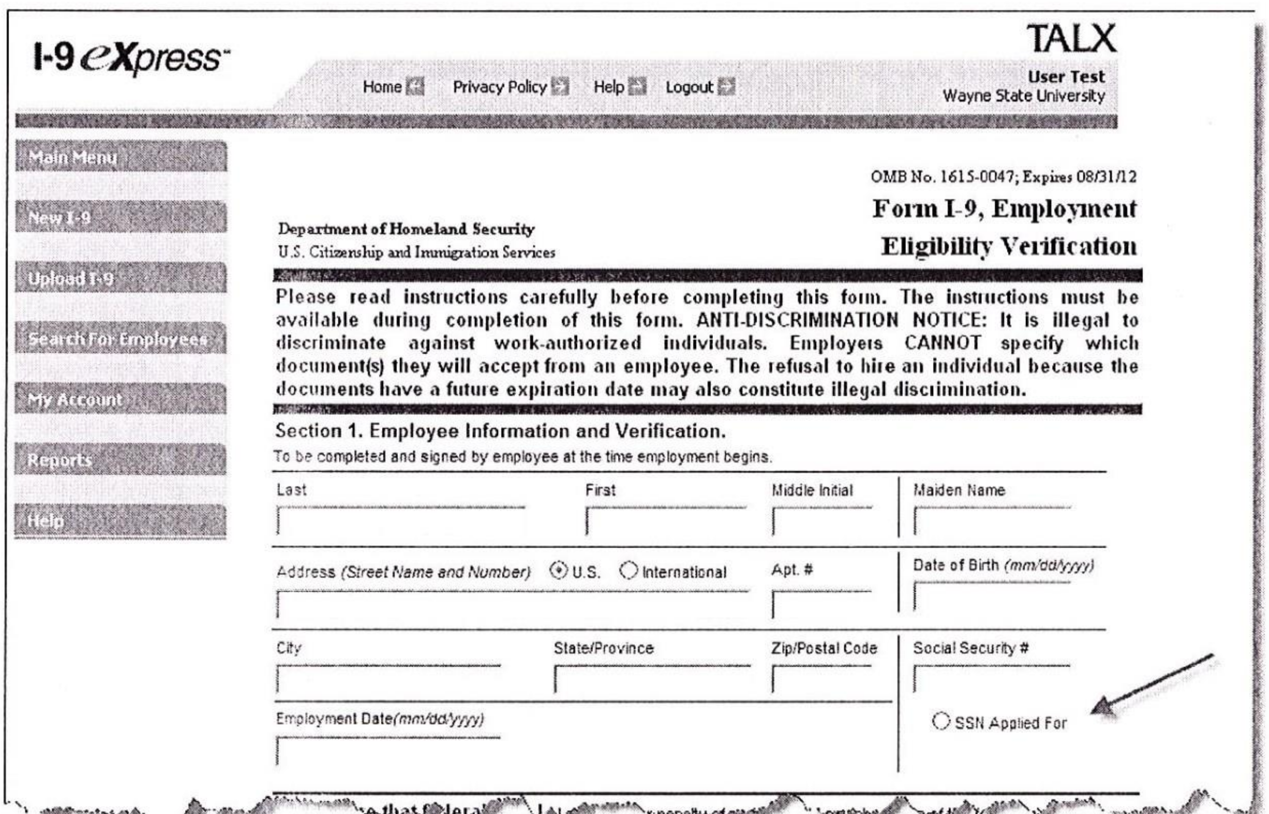
HOW TO PROCESS AND RESOLVE A SSN APPLIED FOR I-9

An Employer can complete an I-9 without the Employee's Social Security Number. However, the I-9 will be returned as a SSN Applied For with the status of *"The current I-9 is not eligible for verification through E-Verify".* This is because the E-Verify system requires the employee's SSN in order for the employee to be verified for employment.

Remember, you will need to complete sections 1 and 2 for an Employee without a SSN. Follow the steps below to complete an I-9 without the Employee's SSN. The employee should provide SSN to you within 90 days of their start date of work. If the SSN has not been received within this time, the employee **MUST** be terminated from Payroll.

Step 1: Click the New I-9 link from the Task Pane.

Step 2: Complete the I-9 form selecting the radio button for SSN Applied For.



Step 3: Complete the Preparer and/or Translator Certification section (this is usually automatically completed when you use the New I-9 feature).

Step 4: Click Continue. The Preparer and/or Translator Review screen appears.

Step 5: Verify the information is accurate on the review screen then click the Continue button.

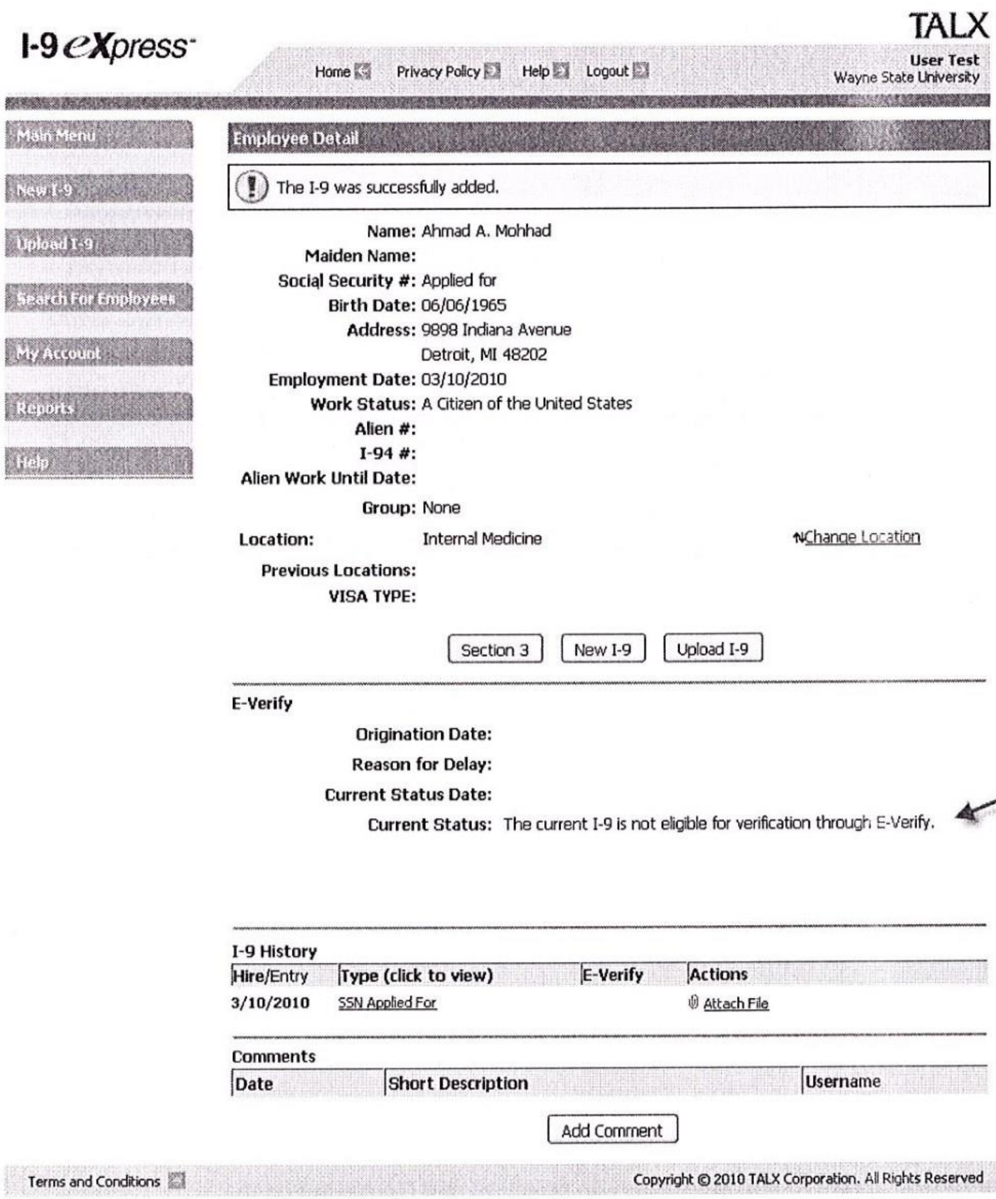
Step 6: The Employee Review Screen appears. Verify the information is accurate and electronically sign the form by checking the box.

Step 7: Click the Continue button. The I-9 is sent to Pending status and Section 2 of the I-9 Form appears. Select the work authorization documents as presented to you by the employee. For example, if the employee lost their SSN card they may present you with a receipt for lost SSN (List C) and a driver's license (List B).

Step 8: After entering the work authorization documents, click the Continue button.

Step 9: The Employer Review screen appears. Verify that all the information is accurate and electronically sign the form.

Step 10: The Employee Detail screen appears indicating that the I-9 was successfully added to the system. E-Verify will (most likely) return a non-eligible status as shown in the image below and place the form in the SSN Applied For category.



HOW TO RESOLVE A SSN APPLIED FOR

After you have received the new SSN from the Employee, you can resolve the SSN Applied For I-9 by following the steps below.

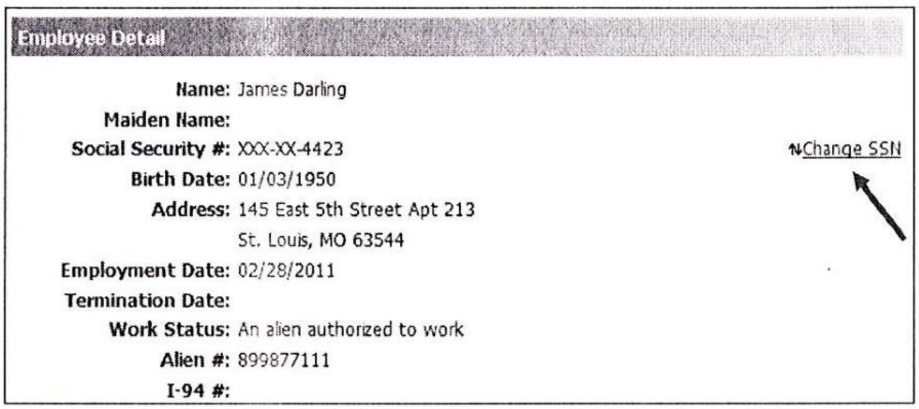
Step 1: When the employee presents you with valid work authorization (in this case their new SSN) return to the I-9 eXpress Main Menu.

Step 2: Click the SSN Applied For link from the Quick Search box.

Step 3: Click the Employee's name

Step 4: The Employee Details page appears. Notice the I-9 History shows that the Employee applied for a SSN. Click the SSN Applied For link.

Step 5: Click the **Change SSN** link on the Employee Detail page. The Change Social Security Number screen appears. Identify the work authorization document presented to you by the Employee (in this case, the new SSN).

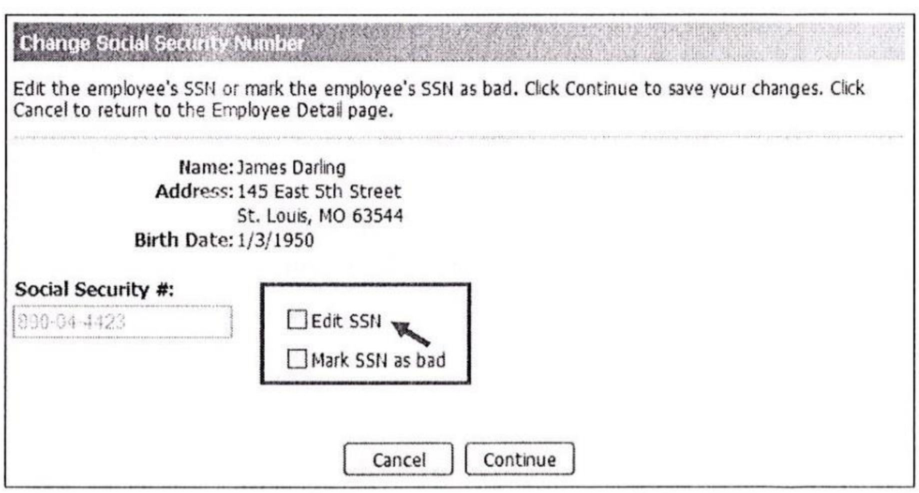


The Change Social Security Number screen appears. Identify the work authorization document presented to you by the Employee (in this case, the new SSN).

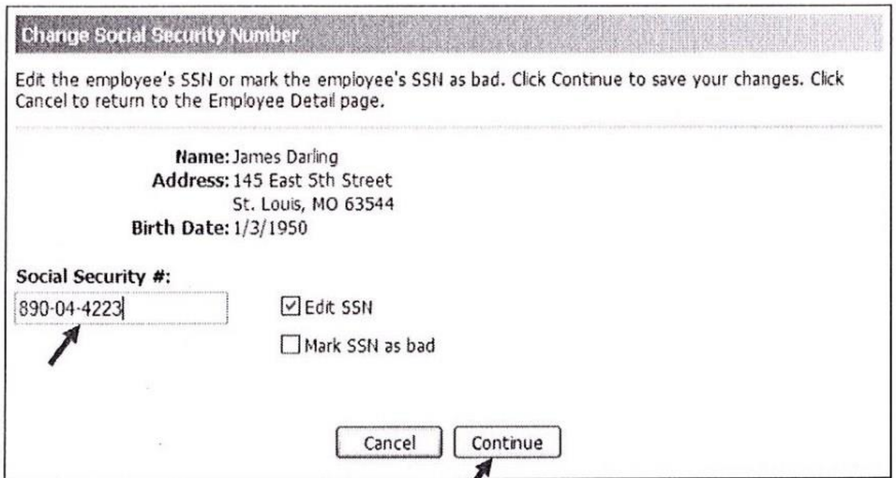
Step 6: Check the box next to Edit SSN

<u>*Description of options.*</u>

- ***Edit SSN*** *– employers can add an SSN if there is no SSN on the I-9 or edit an SSN*
- ***Mark SSN as Bad*** *– employers can mark an existing SSN on an I-9 as bad. This removes the SSN from the employee record. This option is used if an employee is no longer working for the employer, but they have reason to believe that the SSN does not belong to the employee.*

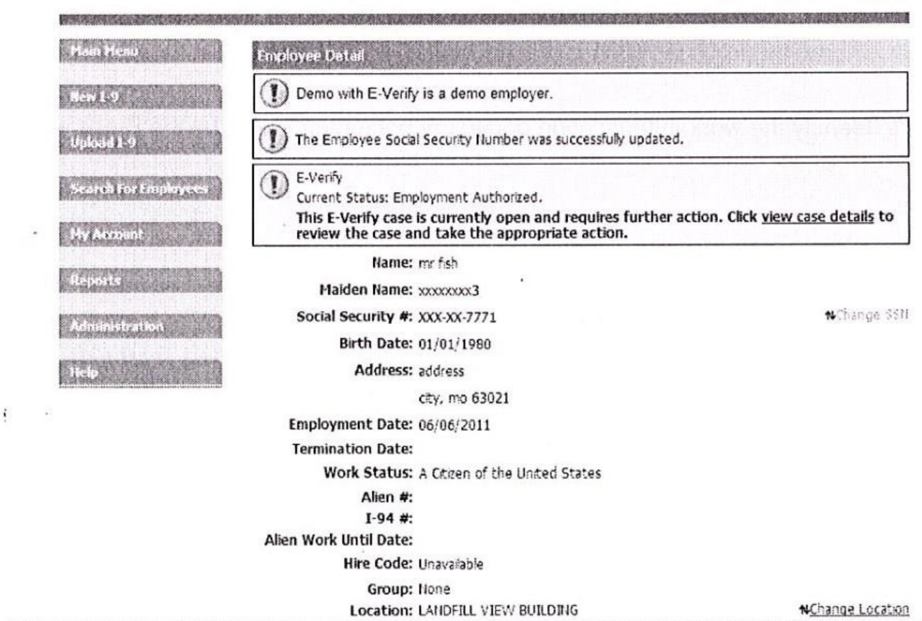


Step 7: Enter the SSN number under the **Social Security #** field and verify the information is accurate



Step 6: Click the **Continue** button.

Step 7: The **Employee Detail** page screen appears and two messages are displayed: One indicates that the SSN Number was successfully updated and 2) an E-Verify message indicating the current case status. Please note: when you enter the employee's SSN, I-9 eXpress will automatically submit the employee's information to E-Verify, if the employee was eligible for E-Verify when the original I-9 was completed.



Step 9: Attach all supporting documents (see the Attaching Supporting Documents job aid)

I-9 MANAGEMENT
E-verify Process for handling SSA/DHS TNC Case

WAYNE STATE

- Log into www.i9express.com

- Click the E-Verify Issues link located in the Quick Search box to identify cases in your assigned divisions with the status of:

  - **SSA Tentative Nonconfirmation (SSA TNC)**
  - **DHS Tentative Nonconfirmation (DHS TNC)**

  A **Tentative Nonconfirmation (TNC)** response means that the Social Security Administration (SSA) and/or the U.S. Department of Homeland Security (DHS) could not confirm that the employee's information matches government records. <u>It does not mean an employee is unauthorized to work or is an illegal immigrant as there are legitimate reasons why an employee may receive this result.</u>

- If the case is at one of the above statuses:

  - Click the **Employee's name.**
  - Click the "**<u>View History</u>**" link under the E-verify column to find the reason for the Nonconfirmation.
  - Click the "**Back"** button to view the employee detail page.
  - Review the Completed I9 and the attached supporting documentation to ensure data accuracy:

    - If a there **<u>are</u>** data entry errors on the completed I-9, the I-9 representative who completed Section 2, must complete the following steps:

      Step 1: Click the **Close Case** button.

      Step 2: Click the appropriate radio button (currently employed or not employed whichever is applicable).

      Step 3: Click the radio button for **The case is invalid because the data entered is incorrect.**

      Step 4: Click the **Continue** button.

      Step 5: Complete a New I-9 ensuring the data entered is correct before submitting to E-Verify.

      [End of process]

    - If there **<u>are no</u>** data entry errors on the completed I-9, the following steps must be followed:

      Step 1: Explain the tentative Nonconfirmation result by using the following language:

> *"When your information was compared electronically to government records, the Social Security Administration (SSA) or Department of Homeland Security (DHS) could not confirm that you are eligible to work in the United States. As a result you must contact SSAOR DHS to resolve the situation within 8 government working days if you wish to continue remain employed with Wayne State University."*

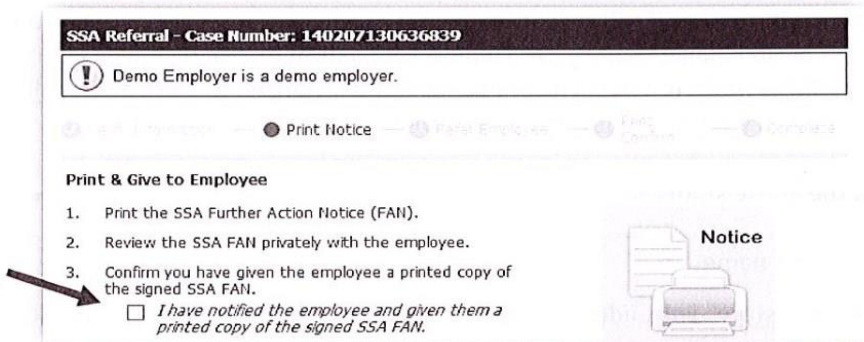
Step 2: Print the SSAN/DHS Further Action Notice (FAN)

I-9 MANAGEMENT
E-verify Process for handling SSA/DHS TNC Case

==

Step 3: Review the SSA/DHS Further Action Notice (FAN) privately with the employee and ensure all the information is correct. Again, follow the "If a there **are** data entry errors..." steps above.

Step 4: Confirm, by checking the *"I have notified the employee and given them a copy of the signed SSA or DHS FAN"* radio button located on of the "Print Notice" under the TNC wizard.



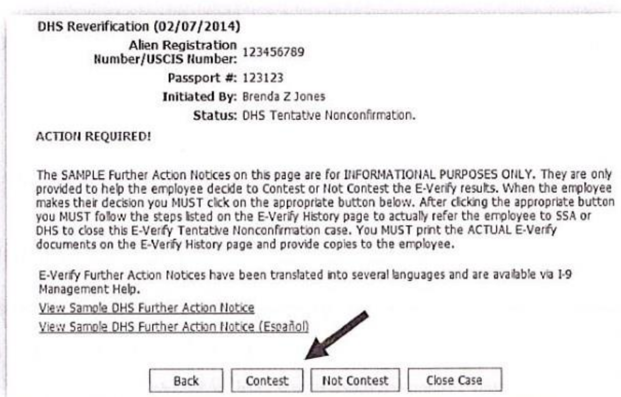
Step 5: Provide the employee with the English version and a foreign language version of the SSA/DHS Further Action Notice (FAN) if the employee does not fully understand English.

Step 6: Ask the employee if he/she wishes to Contest or Not Contest the findings:

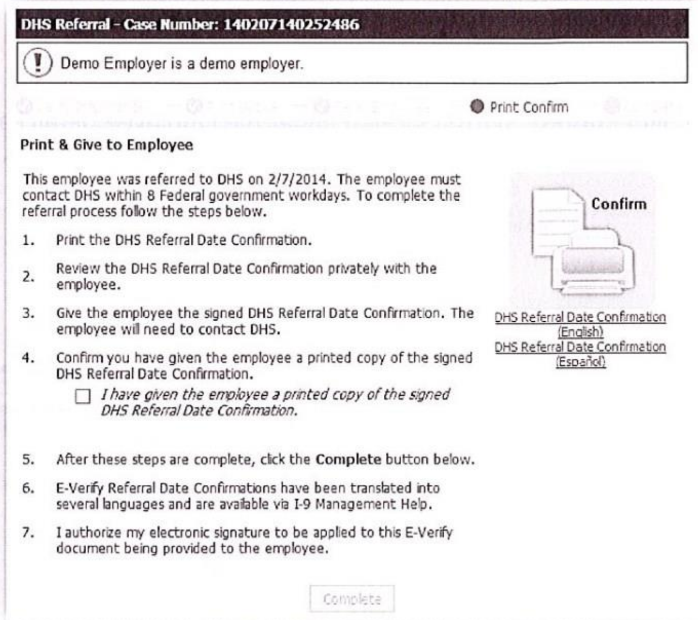
A: **Contest:** *Employee decides to challenge the SSA/DHS findings)*
B: **Not Contest:** *Employee decides not to challenge the SSA/DSH findings*

➢ **<u>If the employee chooses to Contest the findings:</u>**

a. Click the "**Contest**" button located under the Employee Detail Page.



b. *Follow steps 1-7 on the screen (Same as 1-5 below)...*



DHS Referral - Case Number: 140207140252486

Demo Employer is a demo employer.

Print Confirm

Print & Give to Employee

This employee was referred to DHS on 2/7/2014. The employee must contact DHS within 8 Federal government workdays. To complete the referral process follow the steps below.

1. Print the DHS Referral Date Confirmation.
2. Review the DHS Referral Date Confirmation privately with the employee.
3. Give the employee the signed DHS Referral Date Confirmation. The employee will need to contact DHS.
4. Confirm you have given the employee a printed copy of the signed DHS Referral Date Confirmation.
   - ☐ *I have given the employee a printed copy of the signed DHS Referral Date Confirmation.*
5. After these steps are complete, click the **Complete** button below.
6. E-Verify Referral Date Confirmations have been translated into several languages and are available via I-9 Management Help.
7. I authorize my electronic signature to be applied to this E-Verify document being provided to the employee.

Confirm

DHS Referral Date Confirmation (English)

DHS Referral Date Confirmation (Español)

Complete

1. Print the SSA or DHS Referral Date Confirmation (RDC).

2. Review the SSA or DHS Referral Date Confirmation (RDC) privately with the employee.

3. Give the employee the signed SSA or DHS Referral Date Confirmation (RDC) – *remind employee to follow the instructions in the letter.*

4. Confirm, by checking the *"I have notified the employee and given them a copy of the signed SSA or DHS Referral Date Confirmation"* radio button located on step #4 under the TNC wizard.

5. After the steps are completed, click the **Complete** button.

<u>IMPORTANT:</u> The employee MUST be allowed to work through this time as if nothing has happened. They must not be subject to any different treatment because of this issue!

- ✖ With a DHS TNC, the employee <u>must call</u> the DHS office, not visit.
- ✖ For SSA TNC Notice, the employee <u>must visit</u> the SSA office.

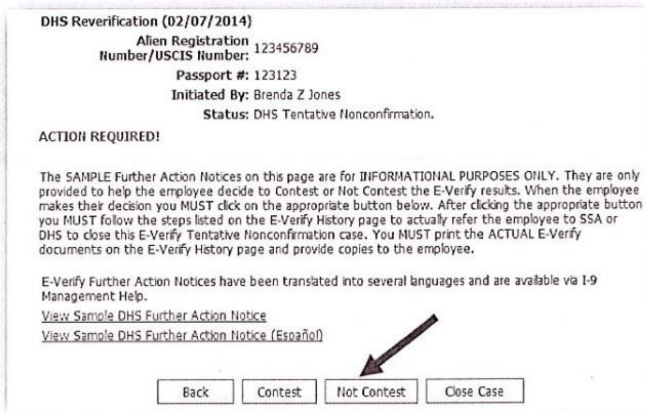
Reinforce to the employee that he/she has <u>8 government working days</u> to resolve the issue displayed in the Reason field (located in the E-verify History page). If the employee cannot resolve the issue within this timeframe, inform him/her that we cannot proceed with their employment at this time, then instruct the unit to proceed with a TERM-E transaction via EPAF (if HR-POS/NEWPOS has already applied).

==

➢ **<u>If the employee chooses to NOT Contest the findings:</u>**

<u>**CRUCIAL:**</u> If the employee chooses <u>Not to Contest</u> the E-verify results, the TNC result is then considered a Final Nonconfirmation , at this point, his/her employment with WSU MUST be terminated.

1. Click the **"Not Contest"** button located under the Employee Detail Page.


DHS Reverification (02/07/2014)
Alien Registration Number/USCIS Number: 123456789
Passport #: 123123
Initiated By: Brenda Z Jones
Status: DHS Tentative Nonconfirmation.
ACTION REQUIRED!

The SAMPLE Further Action Notices on this page are for INFORMATIONAL PURPOSES ONLY. They are only provided to help the employee decide to Contest or Not Contest the E-Verify results. When the employee makes their decision you MUST click on the appropriate button below. After clicking the appropriate button you MUST follow the steps listed on the E-Verify History page to actually refer the employee to SSA or DHS to close this E-Verify Tentative Nonconfirmation case. You MUST print the ACTUAL E-Verify documents on the E-Verify History page and provide copies to the employee.

E-Verify Further Action Notices have been translated into several languages and are available via I-9 Management Help.
View Sample DHS Further Action Notice
View Sample DHS Further Action Notice (Español)

Back | Contest | Not Contest | Close Case

2. Print the SSA/DHS Further Action Notice (FAN) (*now with the decision employee made to not contest*).

3. Review the SSA/DHS Further Action Notice (FAN) privately with the employee.

4. Give the employee the signed SSA/DHS Further Action Notice (FAN).

5. Confirm, by checking the "*I have notified the employee and given them a copy of the signed SSA or DHS FAN*" radio button.

6. After the steps are completed, click the **Complete** button.

7. Click the **Close Case** button.

8. Under the "Is the employee currently employed", select "No- The employee IS NOT currently employed".

9. Select the Case Closure option "The employee was terminated for choosing not to contest a Tentative Nonconfirmation".

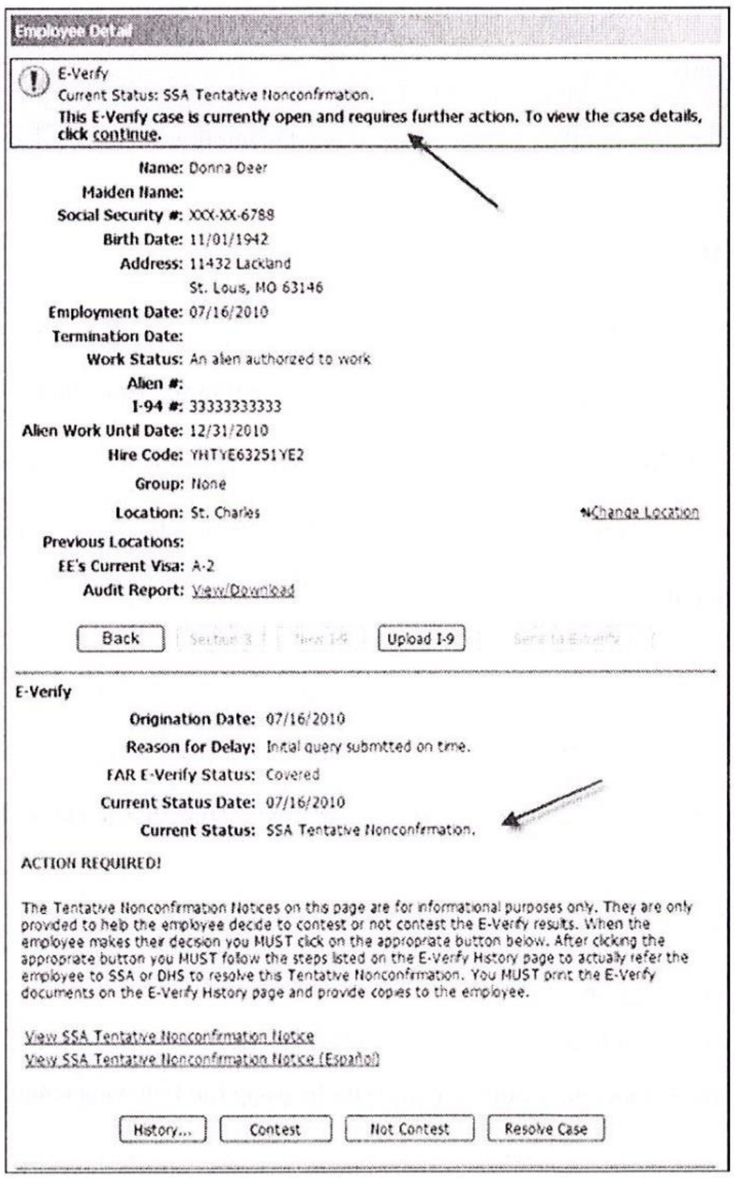
10. <u>Terminating the employee's job in Banner</u>: Inform the hiring manager and proceed with the steps for terminating employment via EPAF (if the HR-POS/NEWPOS transactions has already applied).

I-9 eXpress

How to handle a SSA or DHS Tentative Nonconfirmation (TNC)

A **Tentative Nonconfirmation (TNC)** response means that the Social Security Administration (SSA) and/or the U.S. Department of Homeland Security (DHS) could not confirm that the employee's information matches government records. It does not mean an employee is unauthorized to work or is an illegal immigrant as there are legitimate reasons why an employee may receive this result.

Below is a screenshot of a SSA Tentative Nonconfirmation status. You will still see an E-Verify banner message is displayed at the top of the Employee Detail page



I-9 *eXpress*

How to handle a SSA or DHS Tentative Nonconfirmation (TNC)

The first thing you need to do is check your data and documents and verify that everything is complete and error free. **In most cases, the Employee name, employment date or SSN is incorrect.** Follow the steps below to resolve the TNC.

Step 1: Click the E-Verify Issues link located in the Quick Search box to identify cases in your assigned divisions with the status of:

- **SSA Tentative Nonconfirmation (SSA TNC)**
- **DHS Tentative Nonconfirmation (DHS TNC)**

Step 2: Click Employee Name

Step 3: Review the Completed I9 and the attached supporting documentation to see if any information was entered incorrectly.

If there are data entry errors...

Step 3: Click the **Close Case** button

Step 4: Click the appropriate radio button (currently employed or not employed whichever is applicable)

Step 5: Click the radio button for **The case is invalid because the data entered is incorrect.**

Step 6: Complete a New I-9 ensuring the data entry error in the previous I-9 is entered correctly on the new I-9.

Step 7: Click the **Continue** button.

[End of process]

If there are no data entry errors...

Step 1: If the employee is not present, contact employee and instruct him/her to come see you to discuss the tentative Nonconfirmation result.

Step 2: When the employee arrives, you will need to complete the following steps:

Step 3: Log into www.i9express.com

Step 4: Click the E-Verify Issues link located in the "Quick Search" box then click the employee record.

Step 5: Explain the Tentative Nonconfirmation (TNC) result by using the following language:

How to handle a SSA or DHS Tentative Nonconfirmation (TNC)

> *"When your information was compared electronically to government records, the Social Security Administration (SSA) or Department of Homeland Security (DHS) could not confirm that you are eligible to work in the United States. As a result you must contact SSA to resolve the situation within 8 government working days if you wish to continue remain employed with Wayne State University."*

Step 6: Review the Contest and Not Contest Options with the employee and ask if he/she wishes to **Contest** (*Employee decides to challenge the SSA findings)* or **Not Contest** (*Employee decides not to challenge the SSA findings)*

- If the employee chooses to **Contest** the E-verify results:

  a) Click the "**Contest"** button.

     ...Follow steps 1-4 on the screen (Same as b-d)...

  b) Print the SSA or DHS Tentative Nonconfirmation Notice, (whichever applies) and give it to the employee.

  c) Print the SSA or DHS Referral Letter (whichever applies), review and give it to the employee. Instruct the employee to follow the instructions in the letter.

  d) ☑ Click the checkbox to indicate that the employee has received copies of the SSA or DHS Tentative Nonconfirmation Notice (whichever applies) and the SSA or DHS Referral Letter (whichever applies), and that the employee has provided, either verbally or in writing, authorization to affix the employee's electronic signature to any E-Verify documentation.

  e) Click the "**Add Comment"** button and add a short description like *"Employee chose to contest, Employee has been referred to SSA/DHS"*.

  f) Click the SSA or DHS Referral button (whichever applies).

- Once the expected date arrives I-9 eXpress will automatically be updated with the next response from E-Verify. **Please note that the employee is not obligated to come back and show proof they resolved the case.**

- Note: If the status is anything other than "Employment Authorized", please follow the additional steps given by E-Verify.

  <u>Critical:</u> The employee MUST be allowed to work through this time as if nothing has happened. They must not be subject to any different treatment because of this issue!

  - ✖ **With a DHS TNC, the employee <u>must call</u> the DHS office, not visit.**

How to handle a SSA or DHS Tentative Nonconfirmation (TNC)

- ✖ For SSA TNC Notice, the employee must visit the SSA office.

  Reinforce the employee that he/she has 8 government working days to resolve the issue displayed in the Reason field (located in the E-verify History page). If the employee cannot resolve the issue within this timeframe, inform him/her that we can not proceed with their employment at this time, then instruct the unit to proceed with a TERM-E transaction via EPAF (if HR-POS/NEWPOS has already applied)

- ➢ If the employee chooses **Not to Contest** the E-verify results:
  (If employe does not contest the tentative nonconfirmation, it automatically becomes a **Final Nonconfirmation**. That means that WSU may terminate the employee's employment immediately as an unauthorized employee)

  a) Click the "**Not Contest**" button.

     ...Follow steps 1-4 on the screen (Same as b-d)...

  b) Print the SSA or DHS Tentative Nonconfirmation Notice, (whichever applies) and give it to the employee.

  c) Print the SSA or DHS Referral Letter (whichever applies), review and give it to the employee. Instruct the employee to follow the instructions in the letter.

  d) ☑ Click this checkbox to indicate that the employee has received copies of the SSA or DHS Tentative Nonconfirmation Notice (whichever applies) and the SSA or DHS Referral. Letter (whichever applies), and that the employee has provided, either verbally or in writing, authorization to affix the employee's electronic signature to any E-Verify documentation.

  e) Click the **Add Comment** button and add a short description like *"Employee chose not to contest, case will be closed"*.

  f) Click the **Close Case** button

  g) Under the "Is the employee currently employed", Select "No- The employee IS NOT currently employed"

  h) Select the Case Closure option "The employee was terminated for choosing not to contest a Tentative Nonconfirmation"

  i) Click the **Close Case** button.

Terminating the employee's job in Banner: Process a TERM-E transaction via EPAF (if HRPOS/NEWPOS has already applied).

I-9 eXpress

How to handle a Case Incomplete Status

Case Incomplete status is designed to help reduce the number of Tentative Nonconfirmation (TNC) cases. E-Verify returns a status of **SSA** or **DHS Case Incomplete,** if there are minor discrepancies in the data submitted and the data on record for the employee at SSA or DHS. This status allows the I-9 representative the chance to review/edit the data to confirm accuracy.

1) **Click** the employee's name. (This example displays the E-Verify status of SSA Case Incomplete)

Search Results: E-Verify Issues

Type:
E=E-Verify, C=Complete, P=Pending, R=Reverification, S=SSN Applied For, M=Missing, I=Invalid, F=E-Verify w/o I-9 (Red=Problem, Bold=Urgent)

Type	Name	Location	SSN	Employment	E-Verify Status
E	One, Alpha	**St. Charles**	6788	10/14/2010	SSA Incomplete

Showing 1-1 of **1**

2) **Click** the **Review/Edit Case** button to review the data submitted to E-Verify, confirm it is accurate.

Employee Detail

E-Verify
Current Status: SSA Case Incomplete
This E-Verify case is currently open and requires further action. Click view case details to review the case and take the appropriate action.

Name: Alpha One
Maiden Name:
Social Security #: XXX-XX-6788
Birth Date: 01/01/1951
Address: 11432 Lackland
St. Louis, MO 63146
Employment Date: 10/14/2010
Termination Date:
Work Status: A Citizen of the United States
Alien #:
I-94 #:
Alien Work Until Date:
Hire Code: YHTYE822711E2
Group: None
Location: St. Charles — Change Location
Previous Locations:
EE's Current Visa:
Audit Report: View/Download

[Back] [Section 3] [New I-9] [Upload I-9] [Send to E-Verify]

E-Verify

Origination Date: 10/14/2010
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Current Status Date: 10/14/2010
Current Status: SSA Case Incomplete

[History...] [Review/Edit Case] [Close Case]

I-9 eXpress

How to handle a Case Incomplete Status

E-Verify History - Case Number: 20102871727522U

Initial Verification (10/14/2010)

Name:	Alpha One
Social security #:	XXX-XX-6788
Birth date:	01/01/1951
Employment date:	10/14/2010
Work Status:	A Citizen of the United States
Alien #:	
I-94 #:	
Passport #:	195111111
Visa #:	
Document Type:	U.S. Passport or U.S. Passport Card
Document #:	
Document Expiration Date:	
Initiated By:	John Smith
E-Verify Company ID Number:	11457
Reason for Delay:	Initial query submitted on time.
FAR E-Verify Status:	Covered
Return Name:	
Status:	SSA Case Incomplete

SSA Case Incomplete

Check Information

The information below is on the employee?s Form I-9. Check with the employee to confirm that the information is correct.

If this information is correct, click **Continue.**

If this information is not correct, enter the correct information and click **Continue.**

Last Name:	**First Name:**	**Middle Initial:**	**Maiden Name:**
One	Alpha		

SSN:	**Date of Birth:**	
123456788	01/01/1951	*(mm/dd/yyyy)*

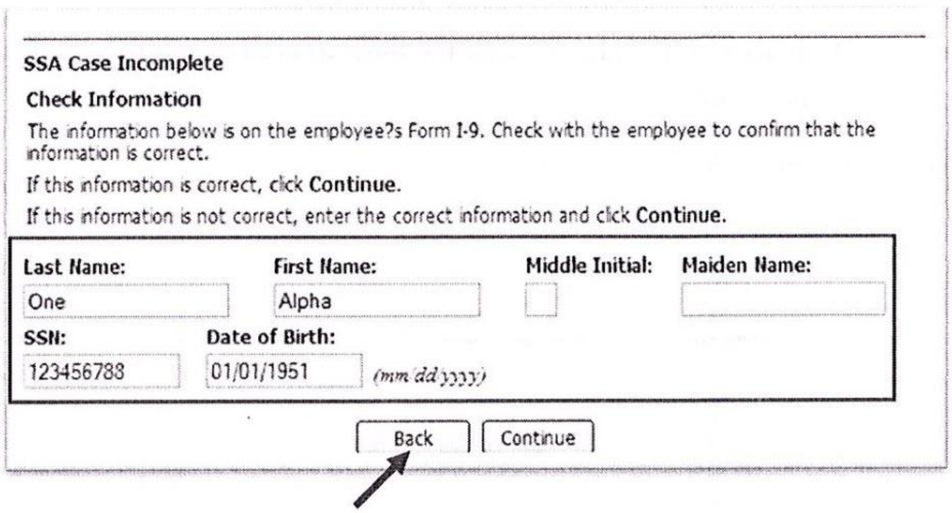
Back | Continue

I-9 eXpress

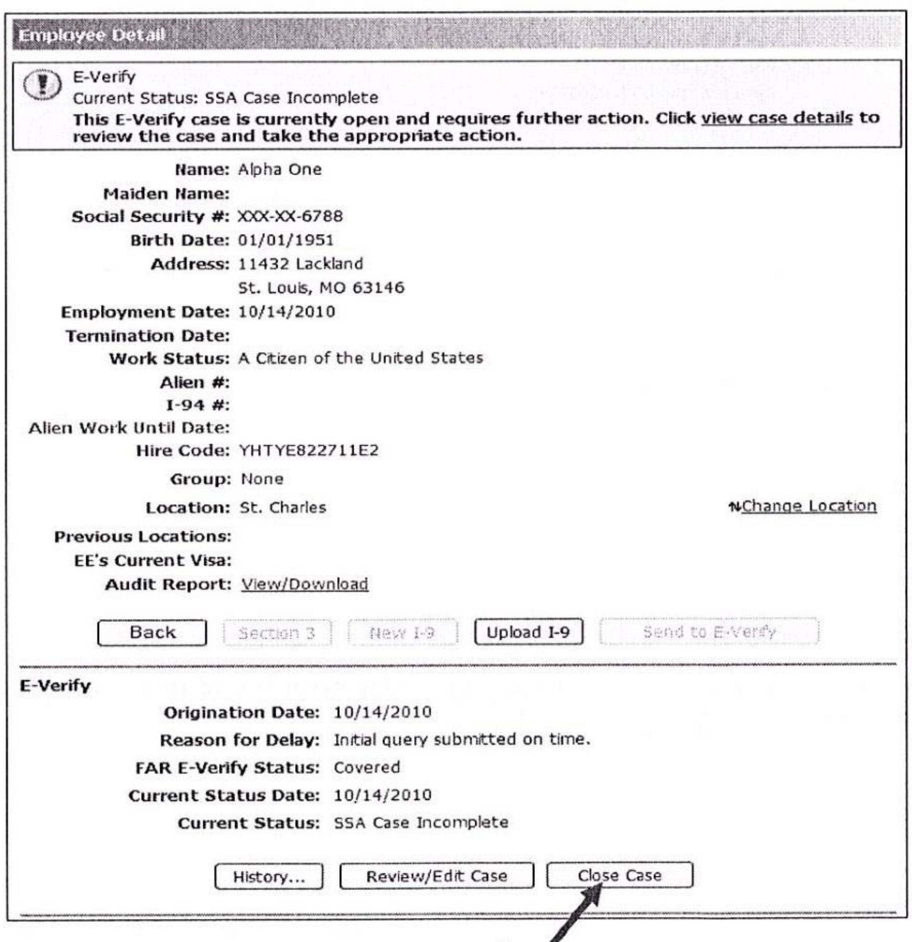
How to handle a Case Incomplete Status

3) If there are data entry errors:

a. Click **Back**



b. Click **Close Case**

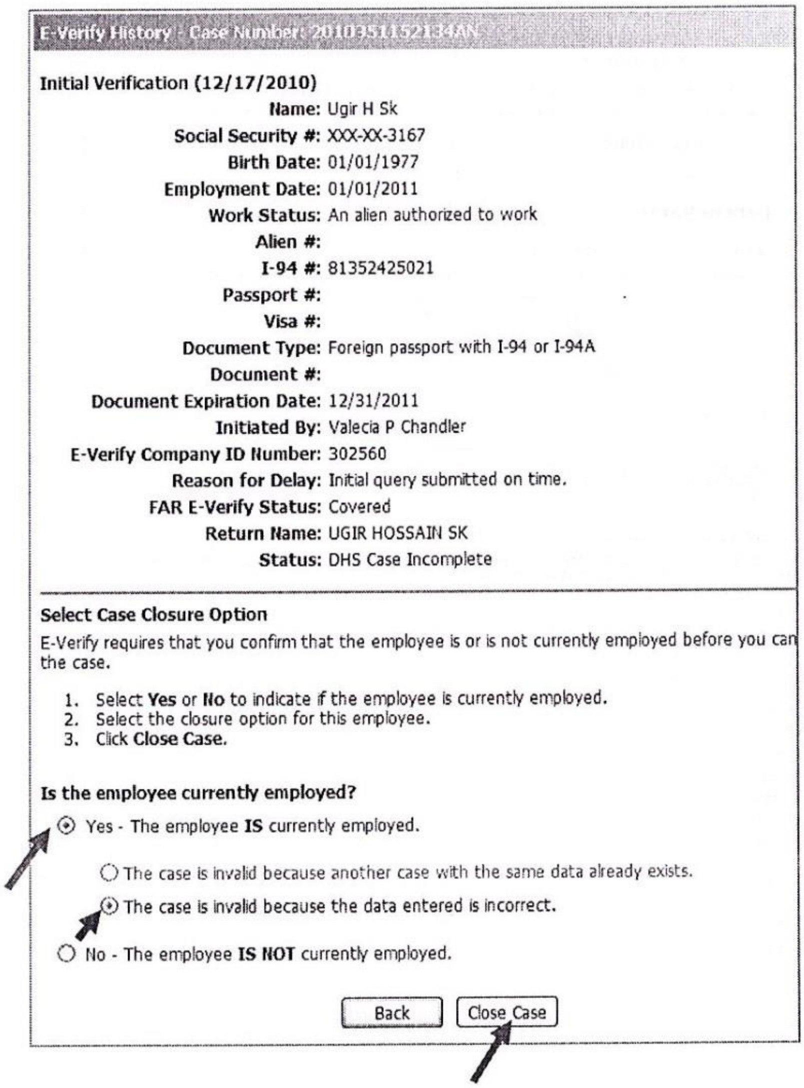


How to handle a Case Incomplete Status

a. Click the ***"Yes – The employee IS currently employed"*** radio button which expands the page to show the closure options available

b. Click ***"The Case is invalid because the data entered is incorrect"*** option

c. Click **Close Case**



E-Verify History - Case Number: 2010351152134AN

Initial Verification (12/17/2010)

Name: Ugir H Sk
Social Security #: XXX-XX-3167
Birth Date: 01/01/1977
Employment Date: 01/01/2011
Work Status: An alien authorized to work
Alien #:
I-94 #: 81352425021
Passport #:
Visa #:
Document Type: Foreign passport with I-94 or I-94A
Document #:
Document Expiration Date: 12/31/2011
Initiated By: Valecia P Chandler
E-Verify Company ID Number: 302560
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name: UGIR HOSSAIN SK
Status: DHS Case Incomplete

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not currently employed before you can the case.

1. Select **Yes** or **No** to indicate if the employee is currently employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

(•) Yes - The employee **IS** currently employed.

( ) The case is invalid because another case with the same data already exists.

(•) The case is invalid because the data entered is incorrect.

( ) No - The employee **IS NOT** currently employed.

[Back] [Close Case]

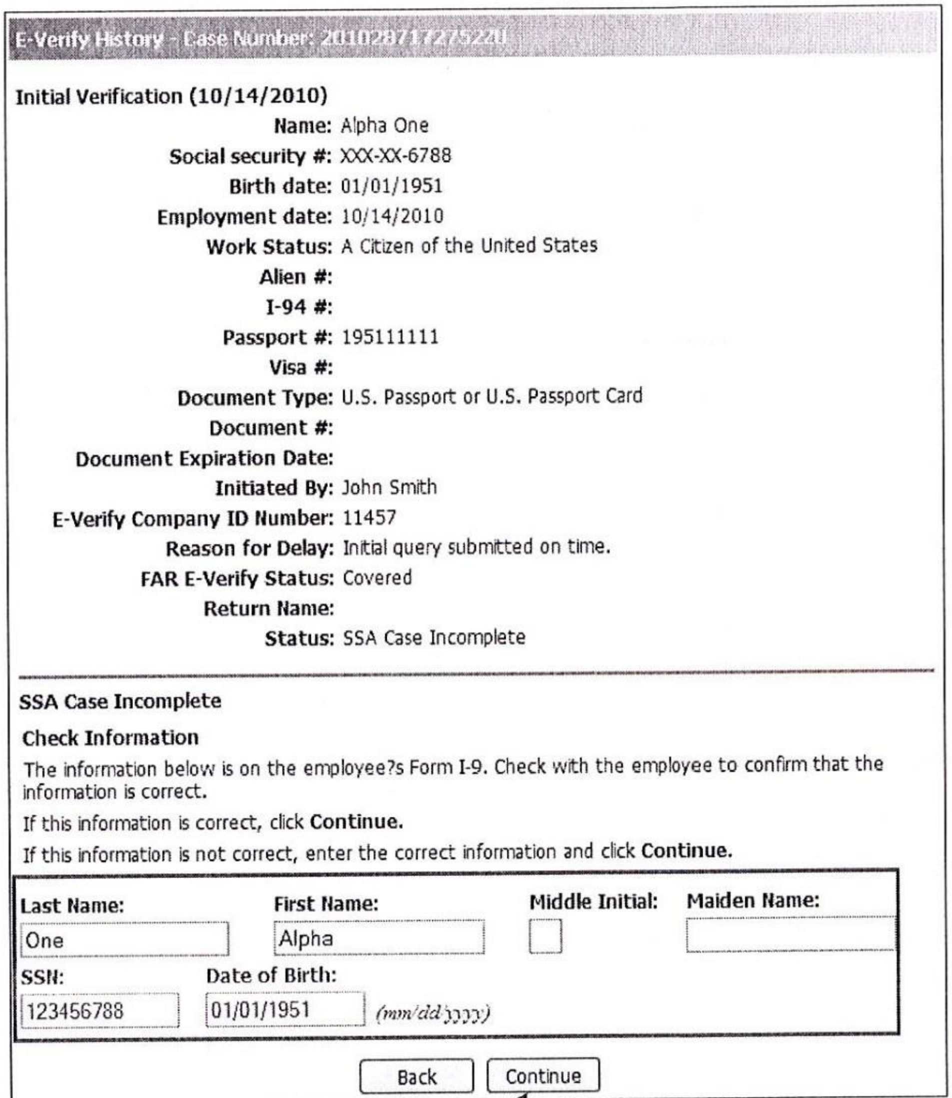
d. Complete a New I-9. **<u>Ensure the data entry error found in the previous I-9 is entered correctly on the new I-9</u>**

I-9 eXpress

How to handle a Case Incomplete Status

4) If there <u>are no</u> data entry errors:

a. Click **Continue**


E-Verify History - Case Number: 20102871727522U

Initial Verification (10/14/2010)

Name: Alpha One
Social security #: XXX-XX-6788
Birth date: 01/01/1951
Employment date: 10/14/2010
Work Status: A Citizen of the United States
Alien #:
I-94 #:
Passport #: 195111111
Visa #:
Document Type: U.S. Passport or U.S. Passport Card
Document #:
Document Expiration Date:
Initiated By: John Smith
E-Verify Company ID Number: 11457
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name:
Status: SSA Case Incomplete

SSA Case Incomplete

Check Information

The information below is on the employee?s Form I-9. Check with the employee to confirm that the information is correct.

If this information is correct, click **Continue.**

If this information is not correct, enter the correct information and click **Continue.**

Last Name:	First Name:	Middle Initial:	Maiden Name:
One	Alpha		

SSN:	Date of Birth:
123456788	01/01/1951 *(mm/dd/yyyy)*

Back | Continue

After the **SSA or DHS Case Incomplete** status, the case is then updated by E-Verify to one of the following statuses:

- Employment Authorized
- SSA or DHS Tentative Nonconfirmation
- Photo Match

I-9 eXpress

How to handle a Case Incomplete Status

This is an example of a **DHS Incomplete** after clicking the **Review/Edit Case button**

E-Verify History - Case Number: 2010281113153NL

Initial Verification (10/08/2010)

Name: Charlie Three
Social security #: XXX-XX-6789
Birth date: 03/03/1973
Employment date: 10/08/2010
Work Status: An alien authorized to work
Alien #: 197333333
I-94 #:
Passport #:
Visa #:
Document Type: Form I-766 - Employment Authorization Document that contains a photograph
Document #: ABC1234567890
Document Expiration Date: 03/03/2013
Initiated By: John Smith
E-Verify Company ID Number: 11457
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name:
Status: DHS Case Incomplete

DHS Case Incomplete

Check Information

The information below is on the employee?s Form I-9. Check with the employee to confirm that the information is correct.

If this information is correct, click **Continue.**

If this information is not correct, enter the correct information and click **Continue.**

Alien Number: 197333333

Document Number: ABC1234567890

Back | Continue

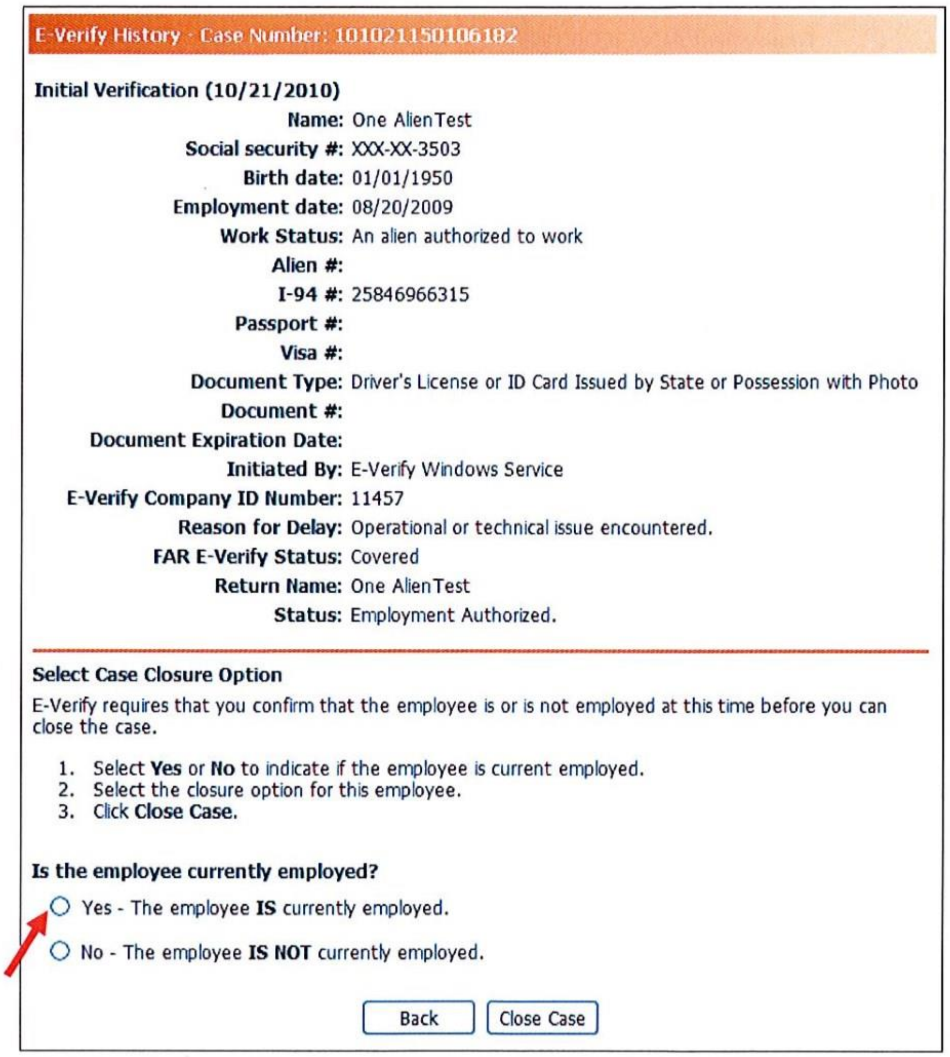
I-9 eXpress

Manual Case Closure Instructions

Case Closure Scenario #1

- The E-Verify case status is **Employment Authorized** and the employee is still employed. You are attempting to close the case:
- Clicking the **Yes** radio button expands the page to show the closure options available.

  Note: If the status is **Employment Authorized** and you select "Yes - the employee IS currently employed", the closure status "The employee continues to work after receiving an Employment Authorized result" is already selected for you



E-Verify History - Case Number: 101021150106182

Initial Verification (10/21/2010)

Name:	One AlienTest
Social security #:	XXX-XX-3503
Birth date:	01/01/1950
Employment date:	08/20/2009
Work Status:	An alien authorized to work
Alien #:	
I-94 #:	25846966315
Passport #:	
Visa #:	
Document Type:	Driver's License or ID Card Issued by State or Possession with Photo
Document #:	
Document Expiration Date:	
Initiated By:	E-Verify Windows Service
E-Verify Company ID Number:	11457
Reason for Delay:	Operational or technical issue encountered.
FAR E-Verify Status:	Covered
Return Name:	One AlienTest
Status:	Employment Authorized.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

○ Yes - The employee **IS** currently employed.

○ No - The employee **IS NOT** currently employed.

Back | Close Case

I-9 eXpress

Manual Case Closure Instructions

- You must select the appropriate closure option and then click the **Close Case** button to complete the process.

E-Verify History - Case Number: 101021150106182

Initial Verification (10/21/2010)

Name:	One AlienTest
Social security #:	XXX-XX-3503
Birth date:	01/01/1950
Employment date:	08/20/2009
Work Status:	An alien authorized to work
Alien #:	
I-94 #:	25846966315
Passport #:	
Visa #:	
Document Type:	Driver's License or ID Card Issued by State or Possession with Photo
Document #:	
Document Expiration Date:	
Initiated By:	E-Verify Windows Service
E-Verify Company ID Number:	11457
Reason for Delay:	Operational or technical issue encountered.
FAR E-Verify Status:	Covered
Return Name:	One AlienTest
Status:	Employment Authorized.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

(•) Yes - The employee **IS** currently employed.

- (•) The employee continues to work after receiving an Employment Authorized result.
- ( ) The case is invalid because another case with the same data already exists.
- ( ) The case is invalid because the data entered is incorrect.

( ) No - The employee **IS NOT** currently employed.

Back | Close Case

Manual Case Closure Instructions

Case Closure Scenario #2

- The E-Verify case status is **Employment Authorized** and the employee is NOT still employed.
- Clicking the **No** radio button expands the page to show the closure options available.

E-Verify History - Case Number: 1010211501066182

Initial Verification (10/21/2010)

Name:	One AlienTest
Social security #:	XXX-XX-3503
Birth date:	01/01/1950
Employment date:	08/20/2009
Work Status:	An alien authorized to work
Alien #:	
I-94 #:	25846966315
Passport #:	
Visa #:	
Document Type:	Driver's License or ID Card Issued by State or Possession with Photo
Document #:	
Document Expiration Date:	
Initiated By:	E-Verify Windows Service
E-Verify Company ID Number:	11457
Reason for Delay:	Operational or technical issue encountered.
FAR E-Verify Status:	Covered
Return Name:	One AlienTest
Status:	Employment Authorized.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

○ Yes - The employee **IS** currently employed.

○ No - The employee **IS NOT** currently employed.

Back | Close Case

I-9 eXpress

Manual Case Closure Instructions

- You must select the appropriate closure option and then click the **Close Case** button to complete the process.

E-Verify History - Case Number: 1010211501061 82

Initial Verification (10/21/2010)

Name: One AlienTest
Social security #: XXX-XX-3503
Birth date: 01/01/1950
Employment date: 08/20/2009
Work Status: An alien authorized to work
Alien #:
I-94 #: 25846966315
Passport #:
Visa #:
Document Type: Driver's License or ID Card Issued by State or Possession with Photo
Document #:
Document Expiration Date:
Initiated By: E-Verify Windows Service
E-Verify Company ID Number: 11457
Reason for Delay: Operational or technical issue encountered.
FAR E-Verify Status: Covered
Return Name: One AlienTest
Status: Employment Authorized.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

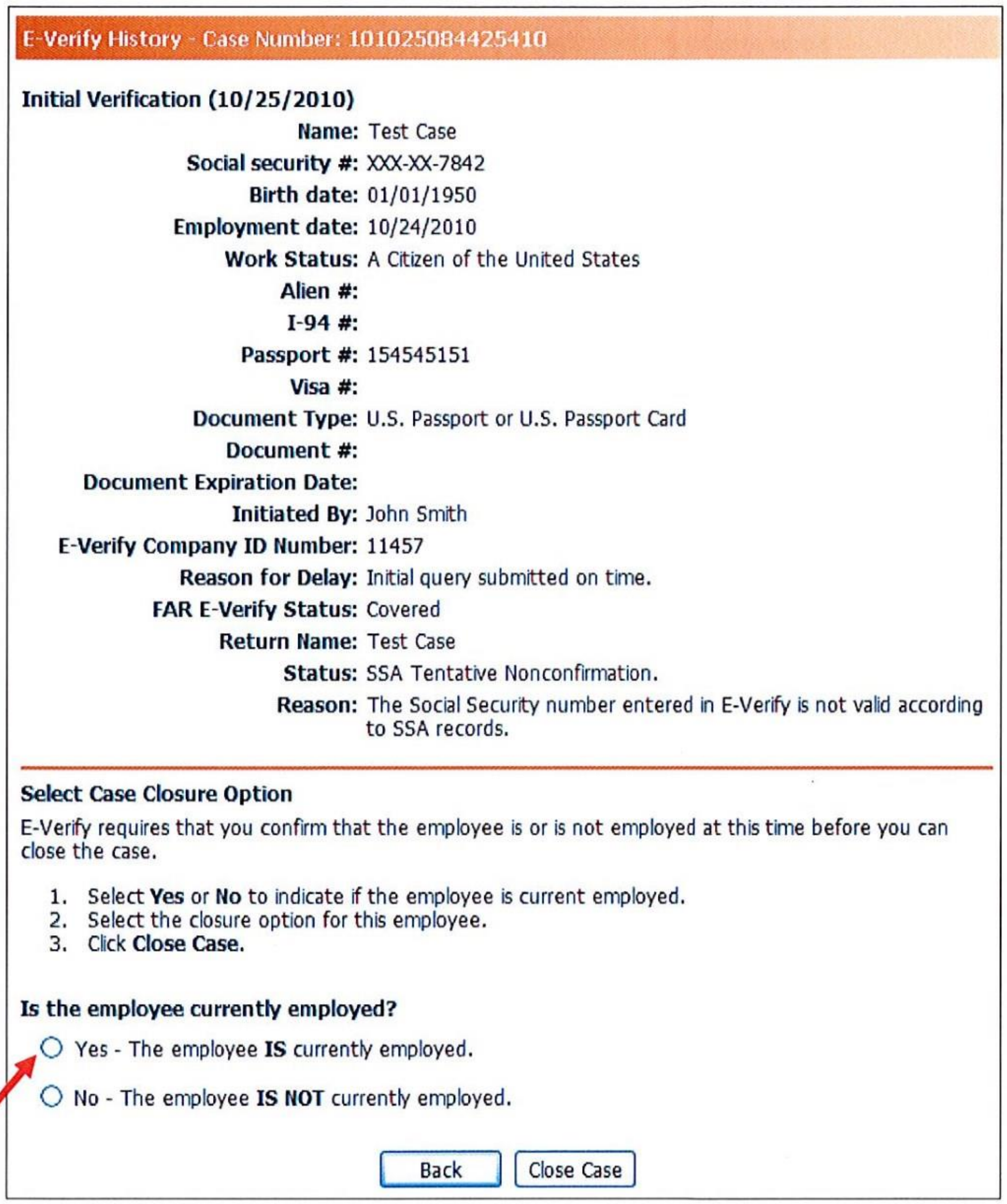
- ○ Yes - The employee **IS** currently employed.
- ⦿ No - The employee **IS NOT** currently employed.
  - ○ The employee voluntarily quit working.
  - ○ The employee was terminated for reasons other than E-Verify.
  - ○ The case is invalid because another case with the same data already exists.
  - ○ The case is invalid because the data entered is incorrect.

[Back] [Close Case]

Manual Case Closure Instructions

Case Closure Scenario #3

- The E-Verify case status is **Tentative Nonconfirmation** and the employee is still employed. You are attempting to close the case:
- Clicking the **Yes** radio button expands the page to show the closure options available.



E-Verify History - Case Number: 101025084425410

Initial Verification (10/25/2010)

Name:	Test Case
Social security #:	XXX-XX-7842
Birth date:	01/01/1950
Employment date:	10/24/2010
Work Status:	A Citizen of the United States
Alien #:	
I-94 #:	
Passport #:	154545151
Visa #:	
Document Type:	U.S. Passport or U.S. Passport Card
Document #:	
Document Expiration Date:	
Initiated By:	John Smith
E-Verify Company ID Number:	11457
Reason for Delay:	Initial query submitted on time.
FAR E-Verify Status:	Covered
Return Name:	Test Case
Status:	SSA Tentative Nonconfirmation.
Reason:	The Social Security number entered in E-Verify is not valid according to SSA records.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

- Yes - The employee **IS** currently employed.
- No - The employee **IS NOT** currently employed.

Back | Close Case

Manual Case Closure Instructions

- You must then select the appropriate closure option and then click the **Close Case** button to complete the process.

E-Verify History - Case Number: 101025084425410

Initial Verification (10/25/2010)

Name: Test Case
Social security #: XXX-XX-7842
Birth date: 01/01/1950
Employment date: 10/24/2010
Work Status: A Citizen of the United States
Alien #:
I-94 #:
Passport #: 154545151
Visa #:
Document Type: U.S. Passport or U.S. Passport Card
Document #:
Document Expiration Date:
Initiated By: John Smith
E-Verify Company ID Number: 11457
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name: Test Case
Status: SSA Tentative Nonconfirmation.
Reason: The Social Security number entered in E-Verify is not valid according to SSA records.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

(•) Yes - The employee **IS** currently employed.

- ( ) The employee continues to work after choosing not to contest a Tentative Nonconfirmation.
- ( ) The case is invalid because another case with the same data already exists.
- ( ) The case is invalid because the data entered is incorrect.

( ) No - The employee **IS NOT** currently employed.

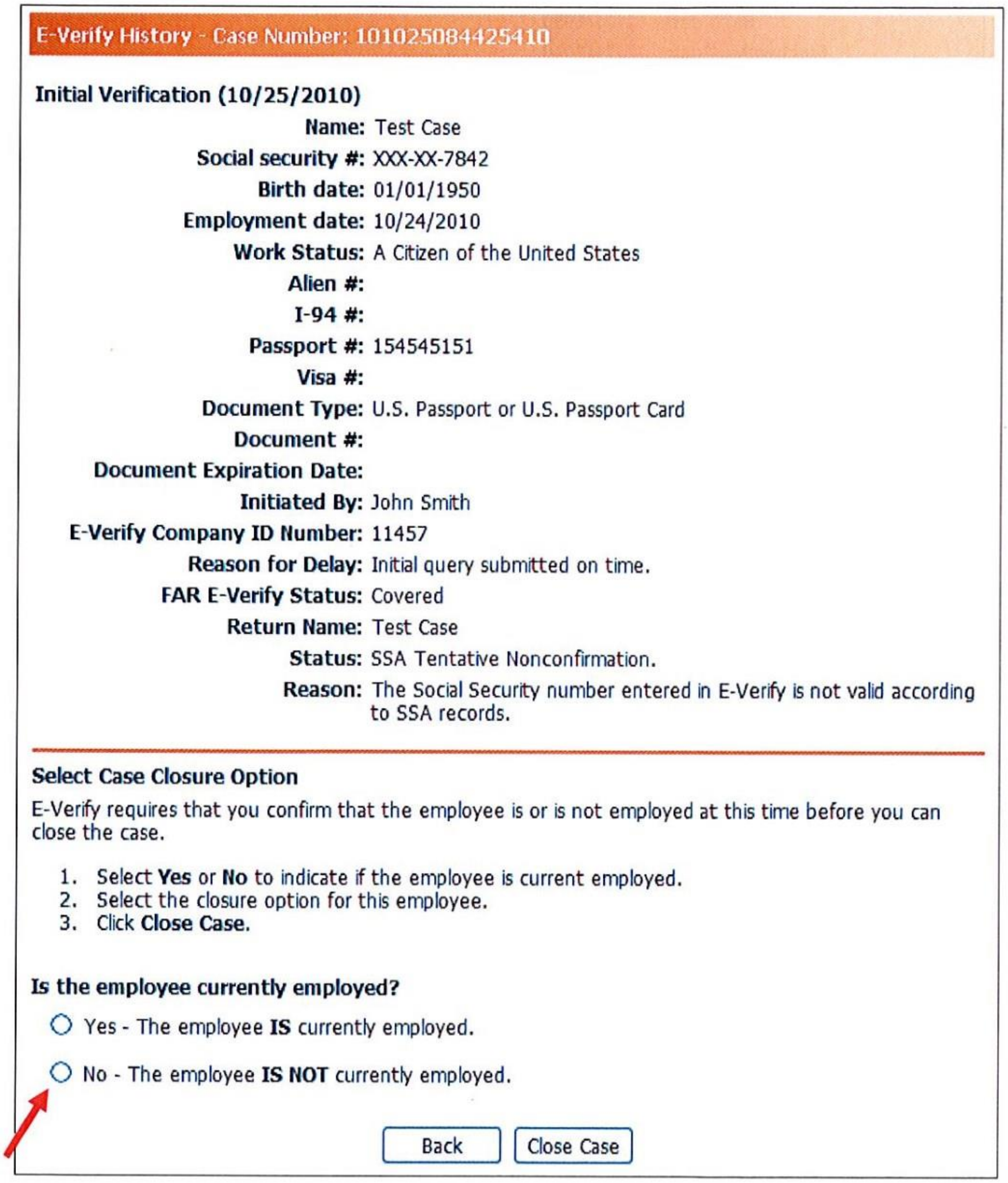
Back | Close Case

I-9 eXpress

Manual Case Closure Instructions

Case Closure Scenario #4

- The E-Verify case status is **Tentative Nonconfirmation** and the employee is NOT still employed. You are attempting to close the case.
- Clicking the **No** radio button expands the page to show the closure options available.



E-Verify History - Case Number: 101025084425410

Initial Verification (10/25/2010)

Name: Test Case
Social security #: XXX-XX-7842
Birth date: 01/01/1950
Employment date: 10/24/2010
Work Status: A Citizen of the United States
Alien #:
I-94 #:
Passport #: 154545151
Visa #:
Document Type: U.S. Passport or U.S. Passport Card
Document #:
Document Expiration Date:
Initiated By: John Smith
E-Verify Company ID Number: 11457
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name: Test Case
Status: SSA Tentative Nonconfirmation.
Reason: The Social Security number entered in E-Verify is not valid according to SSA records.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

Yes - The employee **IS** currently employed.

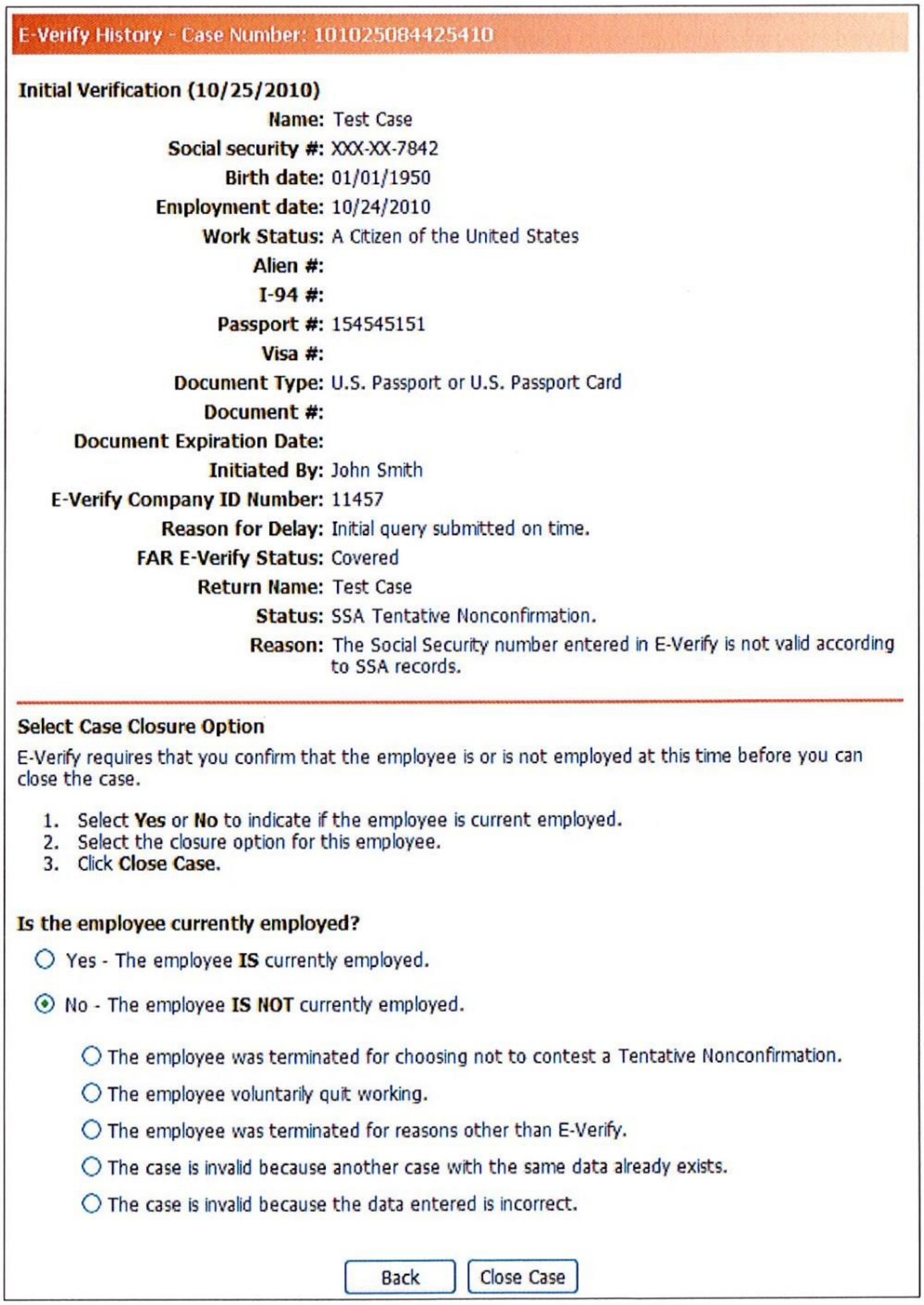
No - The employee **IS NOT** currently employed.

Back | Close Case

I-9 *eXpress*

Manual Case Closure Instructions

- You must then select the appropriate closure option and then click the **Close Case** button to complete the process.



E-Verify History - Case Number: 101025084425410

Initial Verification (10/25/2010)

Name: Test Case
Social security #: XXX-XX-7842
Birth date: 01/01/1950
Employment date: 10/24/2010
Work Status: A Citizen of the United States
Alien #:
I-94 #:
Passport #: 154545151
Visa #:
Document Type: U.S. Passport or U.S. Passport Card
Document #:
Document Expiration Date:
Initiated By: John Smith
E-Verify Company ID Number: 11457
Reason for Delay: Initial query submitted on time.
FAR E-Verify Status: Covered
Return Name: Test Case
Status: SSA Tentative Nonconfirmation.
Reason: The Social Security number entered in E-Verify is not valid according to SSA records.

Select Case Closure Option

E-Verify requires that you confirm that the employee is or is not employed at this time before you can close the case.

1. Select **Yes** or **No** to indicate if the employee is current employed.
2. Select the closure option for this employee.
3. Click **Close Case.**

Is the employee currently employed?

○ Yes - The employee **IS** currently employed.

⊙ No - The employee **IS NOT** currently employed.

○ The employee was terminated for choosing not to contest a Tentative Nonconfirmation.
○ The employee voluntarily quit working.
○ The employee was terminated for reasons other than E-Verify.
○ The case is invalid because another case with the same data already exists.
○ The case is invalid because the data entered is incorrect.

Back | Close Case

Remote Hire Process

On occasion, an employee will work at a remote or off-site location and, therefore, is not able to present original documents to a WSU representative for inspection. If an employee is unable to present original documents to a WSU representative, there are two options for the completion of the employer's section (Section 2) of the Form I-9:

Option 1: if the employee is employed through a temporary employment agency, such as Kelly Services, the agency must complete the Form I-9 on behalf of WSU. The employee is still required to present original documents to the temporary employment agency.

Option 2: the University can authorize a qualified person to act as an agent of the university for the purpose of completing the Form I-9. Follow the steps below:

INSTRUCTIONS FOR HIRING UNIT

Step 1: The hiring unit should instruct the employee to identify an **agent** - a person who is knowledgeable about the Form I-9 to whom the employee could present original documents. This person must be:

- a Human Resources professional at the employee's home institution;
- a staff member in an International Center office at the employee's home institution;
- an attorney
- a notary public. **IMPORTANT:** if notary, please place the notary seal at the bottom of the ***AGENT AUTHORIZATION*** form **and** attach a notary certificate to the documents being notarized.

Step 2: After the Agent has been identified, the hiring unit prepares the Agent Authorization form as follows:

a) Part 1 (Application) -- fill in:
   1. The **Employee's Name**

b) Part 2 (Agency Agreement) – fill in:
   1. The **Name** and **Title** of the WSU representative who will sign the Agency Agreement on behalf of WSU, and
   2. The **Name of the Agent**.

Step 3: Send the prepared form to the Agent with instructions to:

a) Complete, sign and date **Part 1**,

b) Attach the Agent's notary seal, if applicable,

c) Sign and date **Part 2**

d) Return the form to the hiring unit.

Step 4: When the Agent Authorization form is received back from the Agent, the hiring unit reviews:

a) Part 1 to confirm that the Agent has checked one box and, if applicable, placed his or her notary seal on the form; and

b) Part 2 to confirm that Agent has signed and dated the Agency Agreement.

Step 5: If the Agent has properly completed Parts 1 and 2, then the WSU representative signs Part 2.

Step 6: The hiring unit:

a) Sends to the Agent a copy of the completely signed Agent Authorization form.

b) Provides a blank Form I-9 to employee along with the ***Employee Instructions For Completing The Form I-9***

Step 7: After the completed Form I-9 is received from the employee, the hiring unit sends the completed original I-9 and the original Agent Authorization form to Employment Service Center for processing.

EMPLOYMENT ELIGIBILITY VERIFICATION (FORM I-9) AGENT AUTHORIZATION

EMPLOYEE INSTRUCTIONS FOR COMPLETING THE FORM I-9

Please be aware that the US Citizenship and Immigration service mandates that we keep the original I-9 form on file for all employees. This includes the AGENT AUTHORIZATION page. Please follow these instructions CAREFULLY to ensure you are in compliance. **PLEASE NOTE: The law states we must have the original form on file by the 3rd day after starting your assignment.**

Step 1	The Form I-9 is attached to this document. Complete all blanks in Section 1.
Step 2	Present your original identification documents to the Authorized Agent*.
Step 3	The Agent will examine your documents to ensure that you have presented either: • one document from list "A" or • one document from list "B" and one document from list "C": (see the I-9 instruction form for the lists)
	THE AGENT MUST RECORD THE DOCUMENTS IN SECTION 2 OF THE I-9 FORM
Step 4	Attach to the **Form I-9**, clear and legible copies of the document(s) you presented to the Agent.
Step 5	Return all pages of the original **Form I-9** and copies of the document(s) to the hiring unit.

If the form is incomplete or the supporting documents are not received, we will return the form to you.

It is not unusual for a U.S. employer to hire a new employee who doesn't physically come to that employer's offices to complete paperwork. *The Citizenship and Immigration Services allow companies to appoint professionals as their agents to complete the I-9 form. In such cases, employers may designate agents to carry out their I-9 responsibilities. Agents may include notaries public, accountants, attorneys, personnel officers, foremen, etc. An employer should choose an agent cautiously, since it will be held responsible for the actions of that agent. ***Note***: Employers should not carry out I-9 responsibilities by means of documents faxed by a new employee or through identifying numbers appearing on acceptable documents. The employer **must review original documents**. Likewise, Forms I-9 should not be mailed to a new employee to complete Section 2 himself or herself.

If you have questions, call the Employment Service Center, 313.577.2010. Faxed copies of the I-9 Form are not acceptable. Federal law requires Wayne State University to keep **originals** on file.

AGENT AUTHORIZATION FORM

PART 1

APPLICATION - TO BE COMPLETED BY THE AGENT

I am applying to act as the agent for Wayne State University ("WSU") for the purpose of examining and accurately recording the information on the original documentation and any other information, required to complete Section 2 of the Employment Eligibility Verification I-9 Form for ______________________________ ("Employee"), who

Employee's Name

has accepted employment at WSU. By signing below, I certify that I have received the appropriate training to complete Employment Eligibility Verification I-9 Forms and/or that I process Employment Eligibility Verification Forms I-9 as a regular part of my job. **I further represent that I am one of the following:**

- ☐ a Human Resources professional at the employee's home institution;
- ☐ a staff member in an International Center office at the employee's home institution;
- ☐ an attorney
- ☐ a notary public. **IMPORTANT:** if notary, please place the notary seal at the bottom of the ***AGENT AUTHORIZATION*** form **and** attach a notary certificate to the documents being notarized.

Agent hereby accepts such appoint.

Applicant - Print Name: ____________________________

Applicant - Signature: ___________________________________

Date: ____

IMPORTANT: *If notary, please place your notary seal below and attach a notary certificate to the documents being notarized.*

PART 2

AGENCY AGREEMENT - TO BE COMPLETED BY WSU REPRESENTATIVE

Wayne State University ("WSU") by ____________________________________, its _____________________________

Name of WSU Representative **Title**

hereby appoints_____________________________________ ("Agent"), and Agent hereby accepts such appointment

Name of Agent

to serve as WSU's agent solely for the purpose of examining and accurately recording the information on the original documentation and any other information, required to complete Section 2 of the Employment Eligibility Verification Form I-9 for Employee.

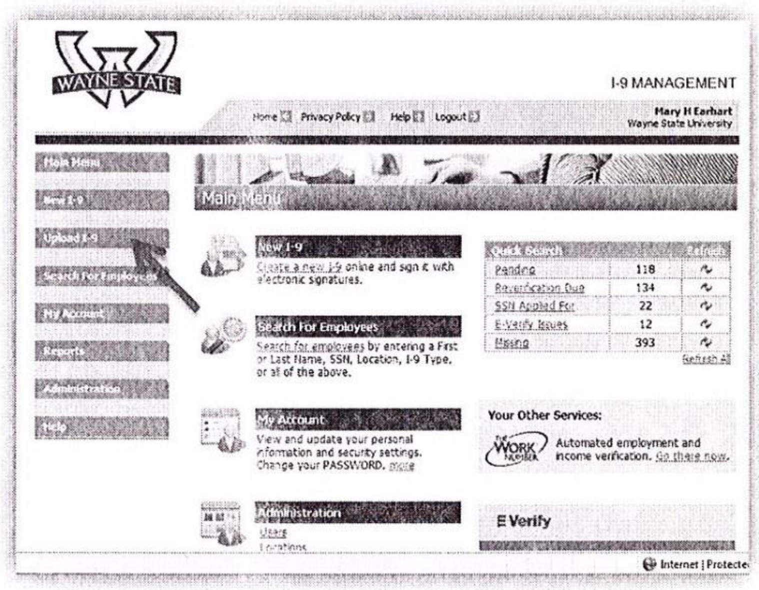
WAYNE STATE UNIVERSITY	**AGENT**
By: _______________________	_______________________
Its: _______________________	_______________________
Date: _____________________	Date: _____________________

Remote I-9 Processing the completed I-9 via I-9 eXpress

IMPORTANT: Ensure the Form I-9 was accurately completed and that you have the appropriate supporting documentation before processing via the I-9 management system (I-9 eXpress). You will need to scan and save the complete Form I-9 and the supporting documentation to your desktop

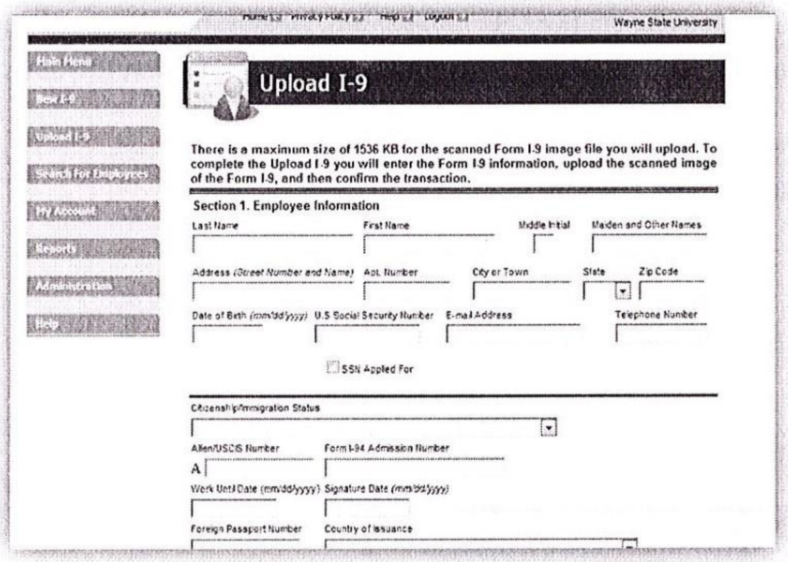
Step 1: Log in to http://www.i9express.com

Step 2: Click "Upload I-9"

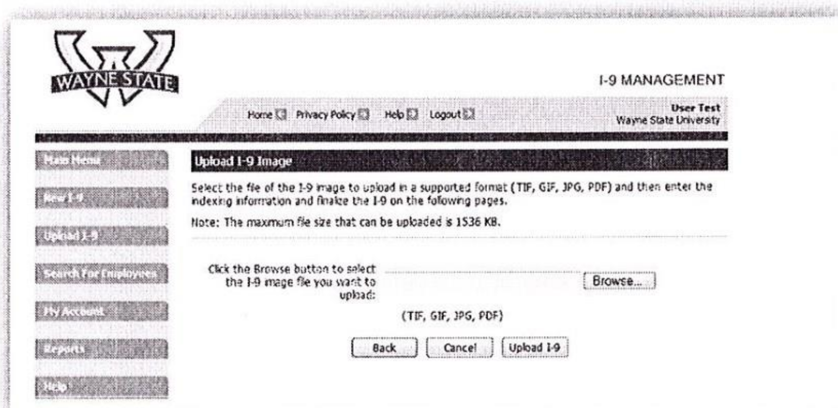


Step 3: Complete Sections 1 and 2 as it appears on the completed Form I-9

Remote I-9 Processing the completed I-9 via I-9 eXpress

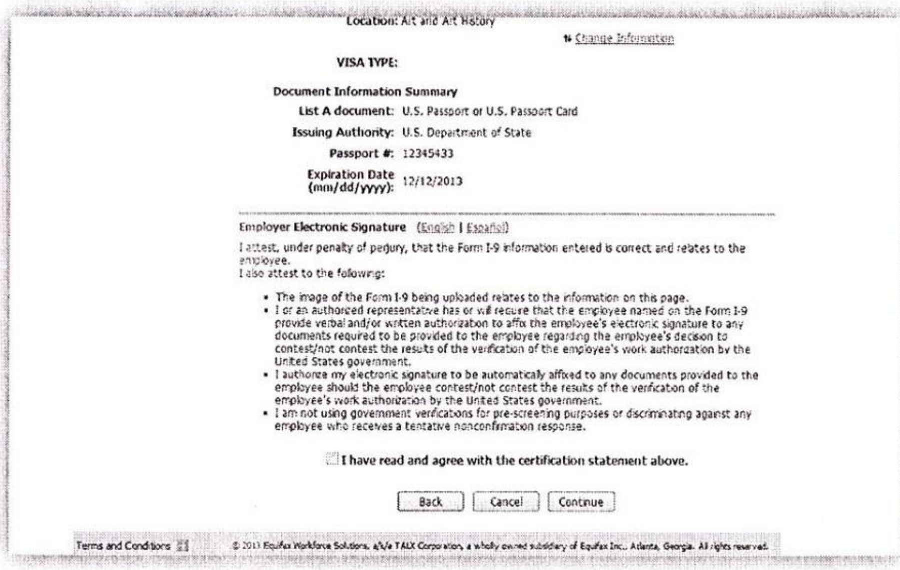


Step 4: Browse and Upload the I-9 form

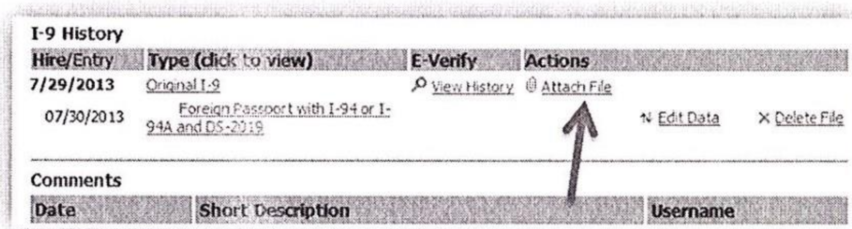


Step 5: Complete the attestation and click continue to send through E-Verify

Remote I-9 Processing the completed I-9 via I-9 eXpress

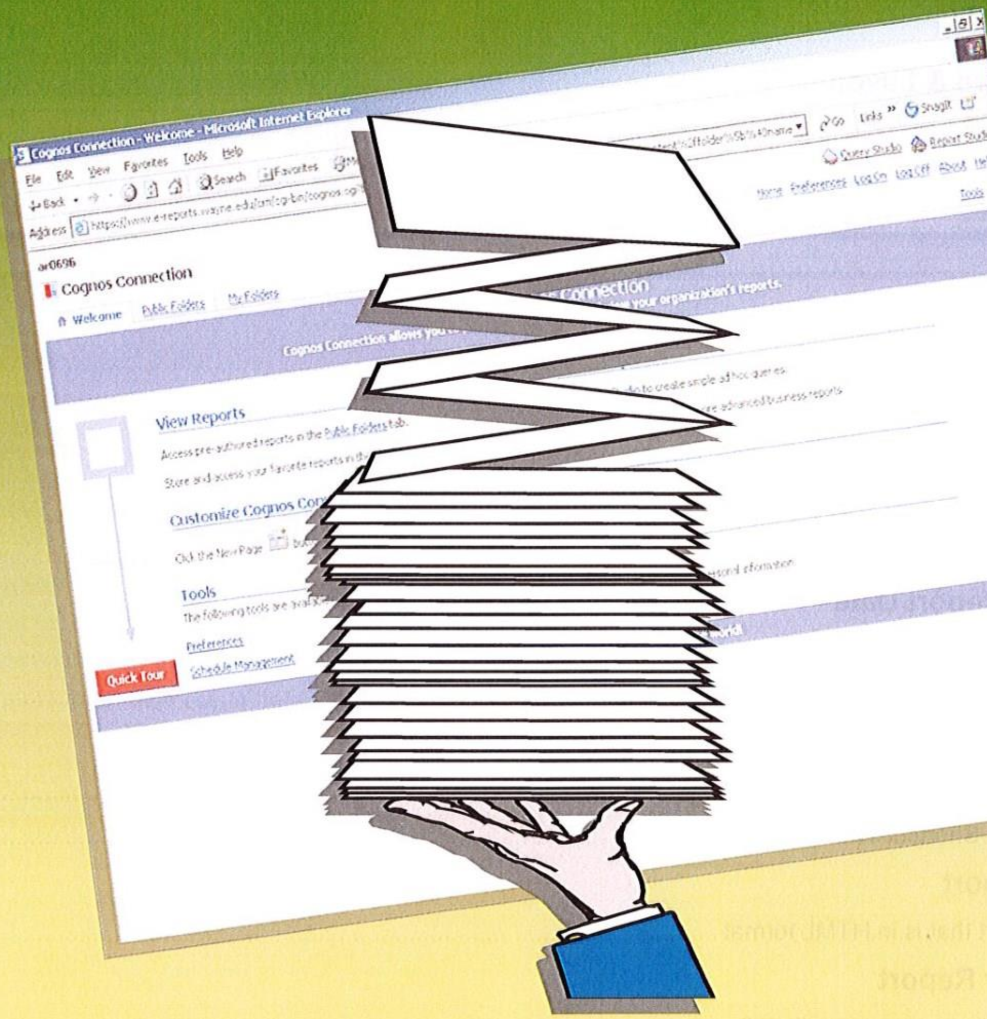


Step 6: Attach the supporting documentation to the case



Cognos

Cognos Navigation



Handling Your Reports

Version 2.0/July 2013

Table of Contents

Cognos & ODS Overview 4

Terminology ... 4

The ODS Environment ... 4

ODS and Cognos Security ... 5

Opening Cognos 7

From WSU Pipeline ... 7

From Your Browser ... 8

Folder Structure & Layout 11

The Entry Area ... 11

Entry Icons ... 11

Tool Bar ... 13

Action Buttons ... 13

Report Types 15

Standard Certified Reports (SCR) ... 15

Locating Your Report 17

Running and Viewing a Report 18

Drilling-down ... 18

Re-running a Report ... 20

Saving Your Report Data 23

Creating A Report View ... 23

Re-running Your Report View With Options ... 24

Creating a Report Shortcut 26

Creating a Report Shortcut ... 26

Using A Report Shortcut With or Without Options ... 28

Printing a Report 30

Printing a report that is in HTML format ... 30

Emailing Your Report 32

Who can I email my report results to? ... 32

What can I email to them? ... 32

Considerations for Emailing Report Results ... 32

Email After the Report Has Run ... 33

What does the email recipient see? ... 35

Exporting Report Data 37

Export to Microsoft Excel ... 37

Scheduling Reports 41

Cog.

Table of Contents

Prompts in Scheduled Reports 41
Schedule a Report 41
Disabling A Scheduled Report 44

Cognos & ODS Overview

Terminology

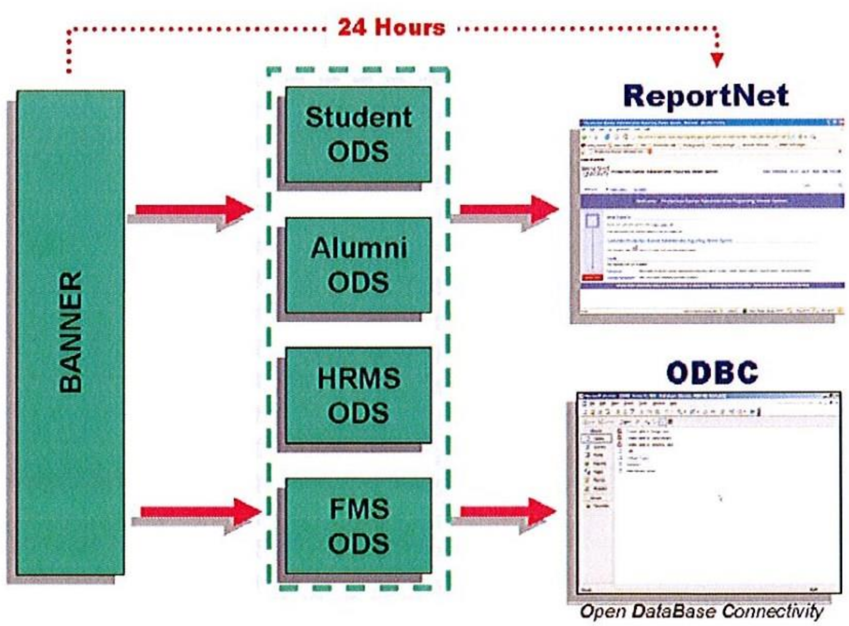
The reporting environment at WSU has recently undergone dynamic changes. The intent of the effort has been to simplify reporting for the report users. This change, however, has introduced new terminology to the reporting mix. The following definitions should help clear any issues or misunderstandings.

Cognos	The software brand name.
Operational Data Store (ODS)	Data storage system where data is retrieved for reporting.
Cognos	The suite of tools for viewing and creating E-reports.
Viewer System Portal	The user interface or entry point, for accessing the tools in Cognos.
Report Viewer	The default report viewer when reports are run for viewing.

The ODS Environment

For purpose of running and viewing reports, report data is not drawn directly from Banner. Every night Banner uploads data into the Operational Data Store (ODS) and only the data necessary for reporting.

For you the report viewer, this means the data on the report you are viewing today is yesterday's data. The vast majority of us do not require "just-in-time" data for making decisions and plans, so data that is delayed 24 hours posses no problem for us.



Cognos & ODS Overview

At WSU, data is extracted from the ODS from one of two ways: Cognos or Open Database Connectivity (ODBC). Cognos is WSU's report viewing and writing tool. Again, for the vast majority of us, this tool is sufficient for our needs.

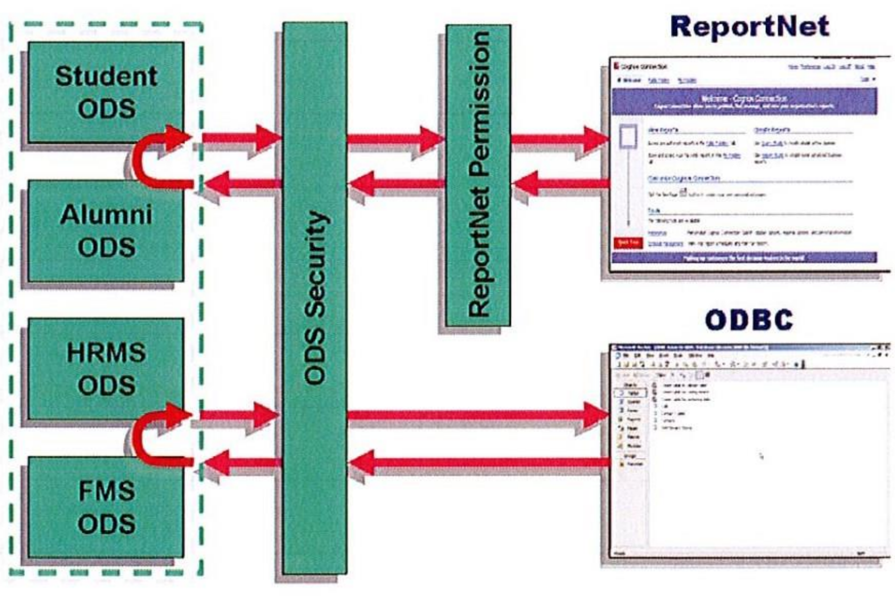
Occasionally, department need to use Banner data in another application, e.g., Microsoft Access. In those instances, the data is extracted from the ODS through a process known as ODBC.

ODS and Cognos Security

In our current data environment, there are two levels of security.

The first is WSU Security. They provide Banner access to the various business systems: Finance, Human Resources, Student, and Alumni. Combined with other variables like school, college, division, etc., a profile is created for each Banner user and report viewer. This profile sets the parameters for the Banner data that each user can see.

The second level of security defines which reports a user has access to. Once again, based on a set of variables and needs, a user is given permission to access and view specific reports. Report permission is granted by each Business System Custodian.



Armed with a Banner access profile and business system report permissions, you are now ready to view your reports using Cognos.

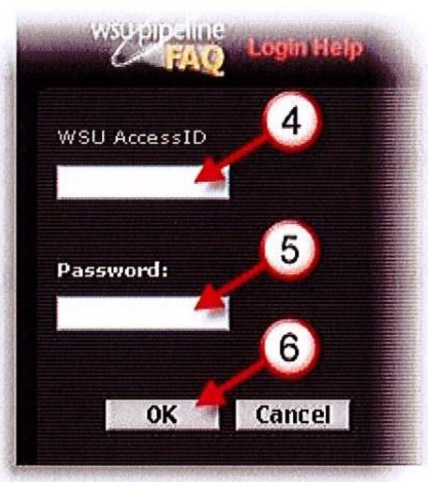
Notes

Opening Cognos

From WSU Pipeline

To open Cognos Cognos from Pipeline:

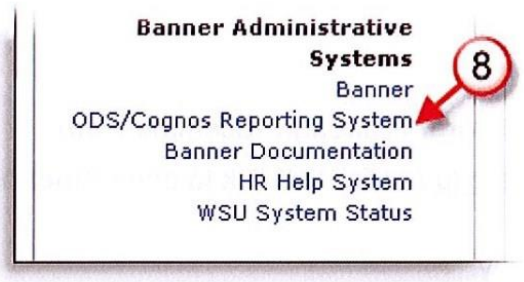
1. Open your Internet browser (**Internet Explorer** is strongly recommended).
2. In the **Address** field, type pipeline.wayne.edu or click this link to open **Pipeline** in a new browser.
3. Click the **Go** button or press the **Enter** key.
4. Enter your **WSU AccessID**.
5. Enter your Pipeline **password**.
6. Click **OK**.



When Pipeline opens:

7. Click the **Employee** tab.

8. Click the **ODS/Cognos Reporting System** link in the left-hand margin under Banner Administrative Systems.



Cognos will open.

From Your Browser

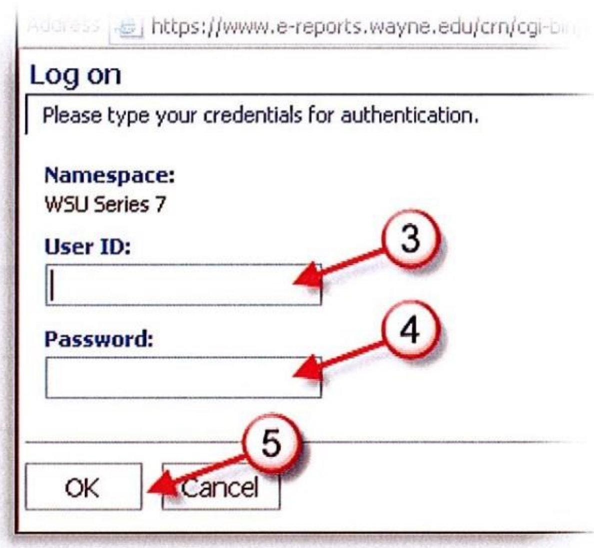
To log on to Cognos without logging on to Pipeline first, you can simply enter the address directly into the address bar of your browser.

Note: You can also use this method if you do not have an "Employee" tab in Pipeline or if you do not have access to WSU Pipeline.

You can also use these steps if you do not have an Employee's tab in Pipeline.

1. Open your browser
2. Enter e-reports.wayne.edu into your browser's address bar. (Or click the previous link to open the log on screen in a new browser.)

3. When the Cognos **Log on** page appears:
4. Enter your WSU AccessID.
5. Enter your Banner Password.
6. Press the **Enter** key or click **OK**.



Cognos will open.

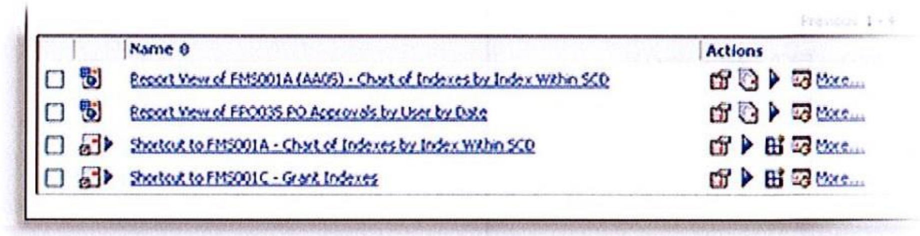
Notes

Folder Structure & Layout

This section describes the basic layout for **Public Folders** and **My Folders** pages. New pages that you may create have their own unique layout and will be covered later.

The Entry Area

Cognos refers to the items that appear in the list under the **Name** column as **entries**.



Entry Icons

In addition to **Folders** and **Reports**, several other types of entries appear here in this area.

- Shortcuts
- Report Views
- Scheduled Jobs
- URLs (Internet Addresses)

Familiarity with these icons gives you insight into the purpose and format of the entry

 Folder

 Shortcut to a Report

 Report View in PDF

 Report View in HTML

 Scheduled Job

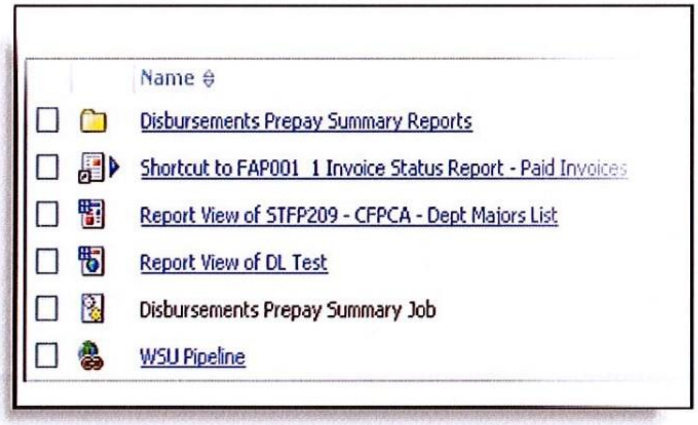
 URL (Internet Address)

 Broken Report View Link

 Broken Shortcut

Folder Structure & Layout

This illustration shows you how they might look in your entry area after you begin to customize your portal and tabs.



A. **Selection Boxes**

   The entry check box must be checked prior to attempting to do any of the following commands on the tool bar:

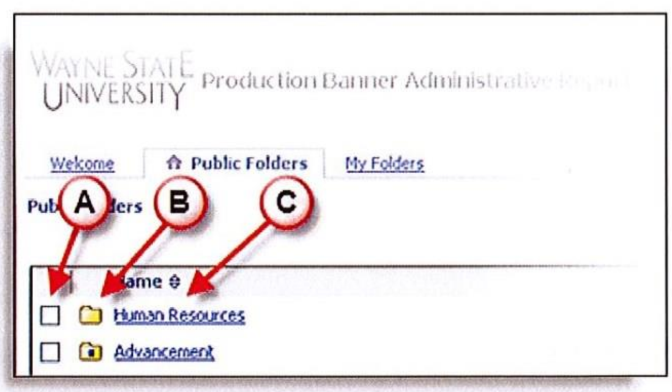
   - Cut
   - Copy
   - Paste
   - Delete

B. **Entry/Action Icons**

   The icons indicate the type of entry that appears in the list.

C. **Name**

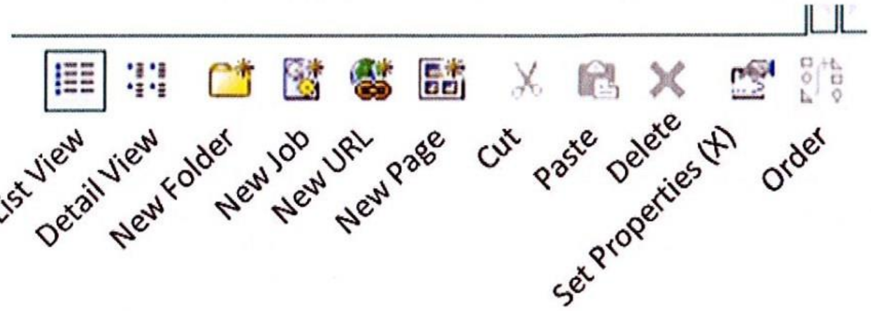
   Describes the entry and is the **hyperlink** to the ***entry***.



Folder Structure & Layout

Tool Bar

This tool bar is available when you select either **Public Folders** or **My Folders** pages.



- **List View**: Default view of the **Public Folders** tab.
- **Detail View**: Option for changing the way **Public Folder** icons are displayed.
- **New Folder**: Creates new folders on **My Folders** tab.
- **New Job**: Creates "batch area" of reports for automatic scheduling on **My Folders** tab.
- **New URL**: Creates link to a web site on **My Folders** tab.
- **New Page**: Creates link to a customizable "portal" page on **My Folders** tab.
- **Cut**: Cuts an item from **My Folders** tab when element is selected (box checked).
- **Paste**: Pastes an item from **My Folders** tab for pasting into another folder on **My Folders** tab.
- **Delete**: Permanently deletes an item from **My Folders** tab when box is checked.
- **Set Properties (X)**: Sets properties for folder that is displayed on **My Folders** tab.

Action Buttons

The icons indicate the actions you can take with each of the entries.

Set Properties: You can only set properties for entries in My Folders.

Report View: View the output versions of the report that have been "saved" to your folder. Report will not be re-run.

Run with options: This will run the report. If parameter values must be set before report is run, you will be prompted for the parameters.

Schedule: You can schedule the report at the time and date of your choosing. You can also set the format and delivery method of the output.

More... **More...**:Provides additional actions that can be taken

Create a Report View of this report

Folder Structure & Layout

Not all action buttons appear for each entry type. This illustration shows the various combinations of buttons as they relate to specific entries on the **My Folders** page.

Report Types

As stated in the section on ***ODS and Cognos Security***, access to reports in Cognos is a two tiered process. WSU Security grants access to the Banner business system modules and the Business System Custodians grant permission to specific reports with each business system.

If you cannot run a particular report or a report folder is empty, it may be the result of missing one or both of the security approvals.

Reports in the **Public Folders** tab fall into one of two categories:

A. Departmental Shareable Reports
B. Standard Certified Reports (SCR)

The folder name indicates the type of reports that are contained within the folder.

Departmental Shareable Reports

- These reports contain data that is unique to individual departments and is only viewable by users within the department.
- Access to the Departmental Shareable Folders and Reports is granted to report users by **business system custodians**.

Standard Certified Reports (SCR)

- These reports are intended for use throughout Wayne State.
- Access to the Standard Certified Reports is granted by the **business system custodians**.

Notes

Locating Your Report

Finding the report you want to view is simply a matter of "drilling down" through the folder tree until you locate the report for which you are looking. By clicking the folder names, you will drill-down until the report you are looking for displays.

The degree of difficulty you will face in finding your report depends largely on your familiarity with the reports. If you have viewed reports in the past, you should not experience much difficulty finding your reports in Cognos.

If the folder structure is not intuitive to you, you can use the Report Crosswalks listed below. Armed with the "old" report name, you can find the folder location of the report you are seeking even if it has a "new" report name.

On the other hand, if you are a new report user, you may experience some degree of difficulty. Without an "old" report name you will not be able to use the Crosswalk to find the folder location of the report, and if the name has changed, it may even be more difficult. Several hints to help you in your search:

- Find a report user in your department/area and ask him or her which forms they use.
- Open the Crosswalk where you believe your report might be located and review it looking for the report you need.
- Drill-down through the Public Folders structure. You may find that it is more intuitive than you might have guessed.

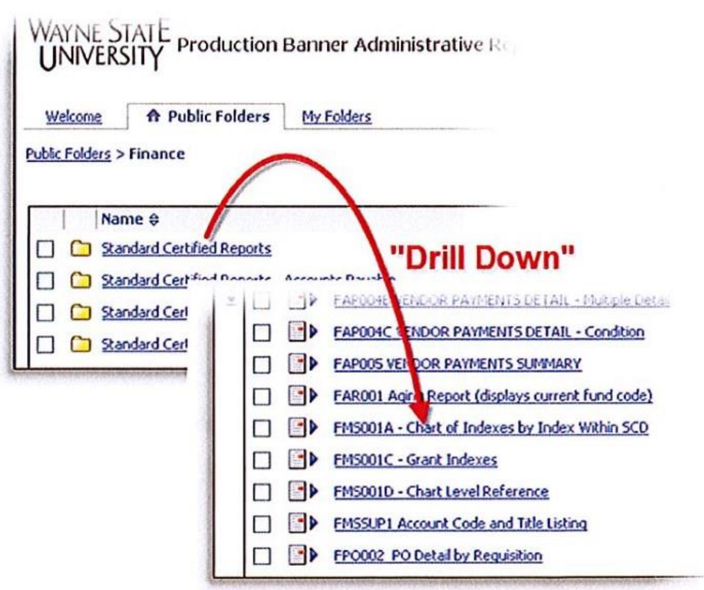
Running and Viewing a Report

To view an E-report in the **Public Folder**, follow these steps:

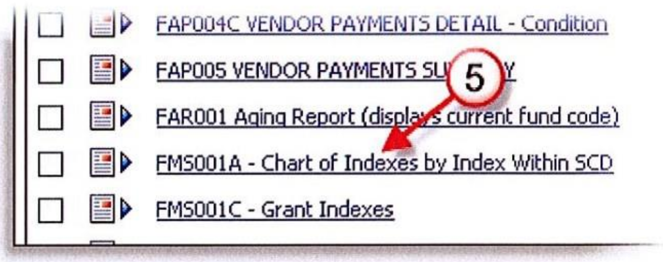
1. Click the **Public Folders** tab if it is not already active.
2. Click the folder link where the e-report you wish to view is located.

Drilling-down

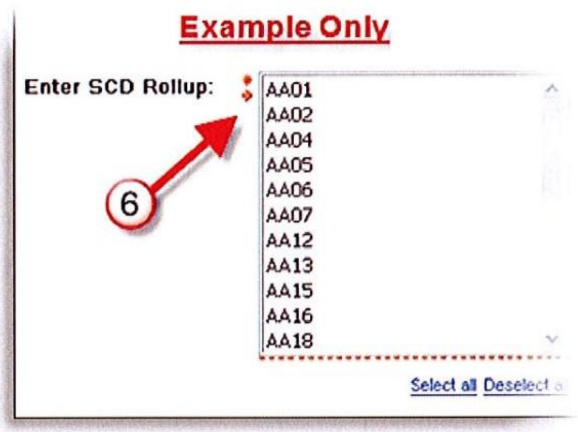
Getting to your report may require several layers of "drill down" before the report name is visible. Once you open the folder containing your report, the folder may contain more reports than are actually displayed on the page. No scroll bar is present and there is no numerical indication of how many reports are in the folder.



4. Once your report is visible, you can run the report by clicking the report name, e.g., **FMS001A - Chart of Indexes by Index within SCD**.



5. If your report requires parameters before it will run, you will be prompted to select them. When you click the **Finish** button located near the bottom of the screen, your report will run.



Note: a **red asterisk** next to a parameter field indicates the parameter is required to run the report. In addition, a report may have multiple parameters required.

7. While the report is running, you may see this message, "**Your report is running.**" (The **3-D Cube** will be rotating to indicate the passage of time.)
8. It is possible to reroute your report results from your printer to an "electronic copy" called a Report View or to an email address for distribution. These topics are addressed in the article "**Can I change the delivery of my report results while my report is running?**"
9.

Your report will display in the **Report Viewer**.

10. You can view your report by using the page control buttons at the bottom of the window or by scrolling with the vertical scroll bar.

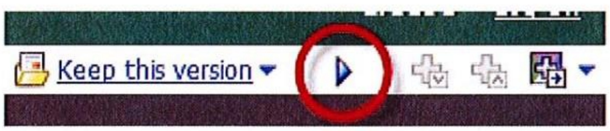
11. To return to the portal, click the **Return** link in the upper left-hand corner of the window.

Re-running a Report

You can re-run your report and change the parameters without returning to the portal.

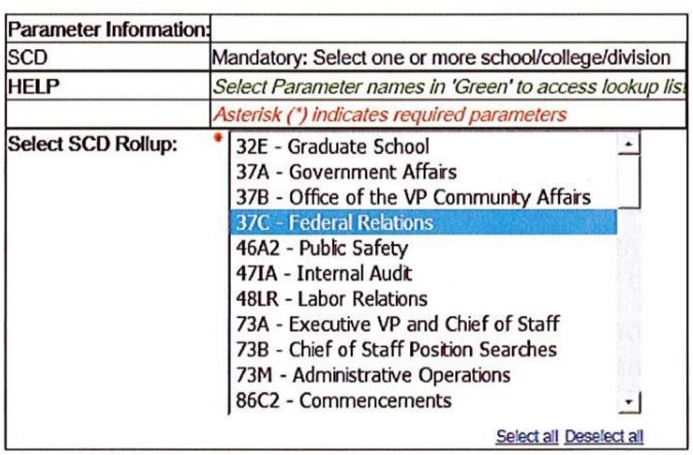
If you run your report in either HTML or PDF formats, the report results will display in your browser. To re-run the report and change the parameters, follow these steps:

1. Click the **Run** icon in the upper left-hand corner of the window.



The page will refresh and you will return to the parameters page.

2. Enter the new parameters.
3. Click the **Finish** button to re-run the report.



Running & Viewing A Report

Your report results will display in your browser.

Note: If you initially ran your report in either an Excel or CSV format, your results will not display in the browser — so there will be no Run with options button to click on. In this case, you will have to return to Public Folders and run your report from the portal once again.

Notes

Saving Your Report Data

Creating A Report View

Creating a Report View is your way to "save" the results of a report that was run with specific formatting and parameters.

As an example, you have run a leave balance report for the first two quarters for the calendar year. If you have a need to "keep" the results of this report, you can create a report view.

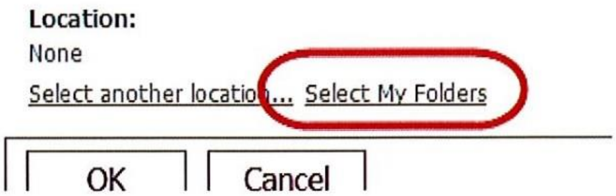
Follow these steps to create a report view:

1. Run your report as you normally would. After the results are displayed…
2. Click the **Keep this version** located in the toolbar. Then click Save as a Report View from the pull-down menu.

3. Enter a name for your Report View. The default name identifies the link that will be created as a "**Report View of...** *(name of the report that was run).*" We recommend that you use the default name and add the parameters to the end.

   For this leave balance report, you might add **(1st & 2nd Qtrs 2013)**. Remember, clicking this link will display report data. Whatever you choose to name it—save yourself time and aggravation—make sure the name gives you a clue as to what is going to be displayed.

4. If you ran your report from **Public Folders**, you **must** click on the **My Folders** link to save the report view to **My Folders** tab. If you forget, you will get an alert box directing you to "Please select a location."



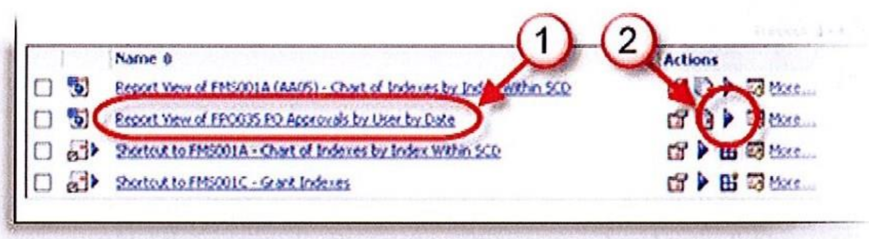
5.

Re-running Your Report View With Options

When you create a **Report View**, in addition to the report layout (columns, rows, and fields), you also capture the format of the report output (html, PDF, etc.), delivery method, and the parameters that were selected when the report was initially run.

By clicking on the **Run with options** icon for your Report View, the options and parameters pages will appear and you can re-run the report with results that are produced with the current selections.

1. When you click the report name, both **Run options** and **Parameter** pages are bypassed. The report runs with the captured formats and parameters.
2. If you click the **Run with options** icon, you will be prompted for both **Run options** and **Parameters** before the report will run.



See ***Running & Viewing A Report*** for additional information for running your report.

Notes

Creating a Report Shortcut

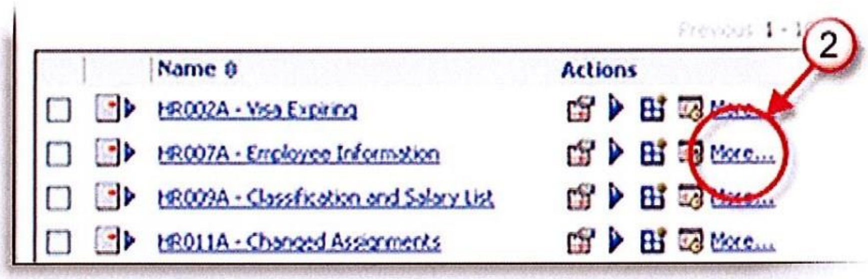
Creating a Report Shortcut

Shortcuts are used to organize information that you use regularly. For example, if you frequently use a report in Public Folders, you can create a shortcut to it in My Folders and avoid having to drill-down to the report every time you want to run it.

Tip: If the source report was deleted or moved to another location, the shortcut icon changes to indicate a broken link, and the properties link to the source report is removed.

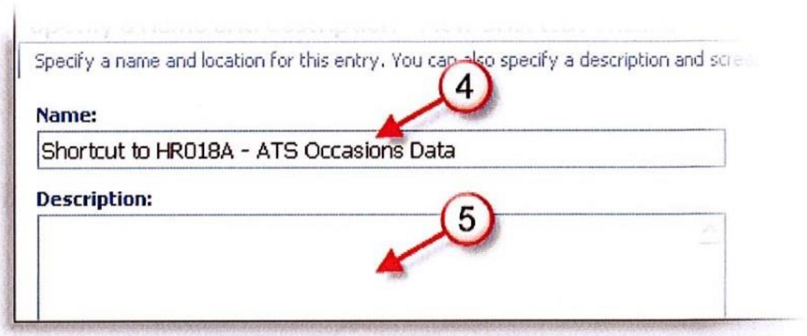
Follow these steps to create a report shortcut:

1. In Public Folders, locate the report you want to create a shortcut to.
2. In the Actions column for the specific report, click **More...**

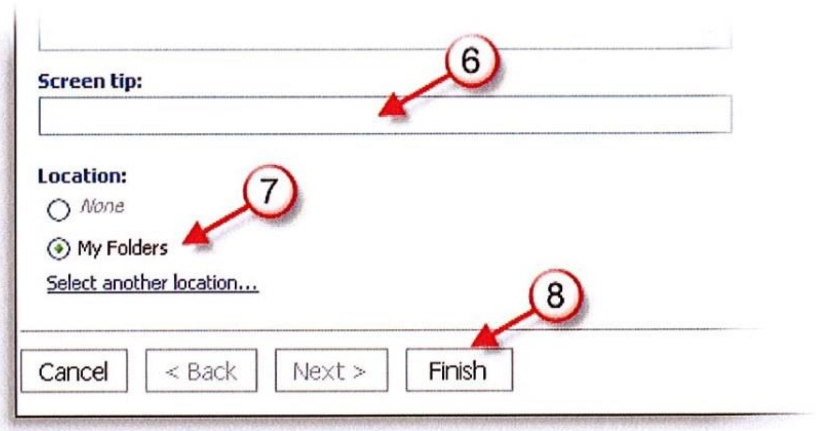


3. Click Create a shortcut to this entry to open the shortcut page

4. In the Name box, type the name of the shortcut.
5. If you want, in the Description and in the Screen tip box, you can type a description of the entry.



6. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
7. Click the radio button for **My Folders**.
8. Click **Finish**.

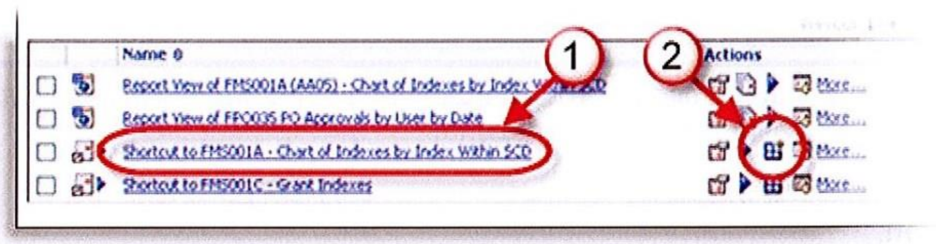


Creating A Report Shortcut

Using A Report Shortcut With or Without Options

When you create a shortcut, the shortcut retains the formatting set on your **Preferences** page and no parameters are retained. It acts just like the original report located on the Public Folders tab.

1. When you click the report name, **Run options** is bypassed, however, you are prompted for **Parameters**.
2. If you click the **Run with options** icon, you will be prompted for both **Run options** and **Parameters**.



Shortcuts are "created" on your **My Folders** tab, *not* to the Public Folders.

Notes

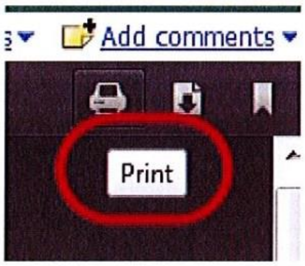
Printing a Report

This procedure assumes you are attempting to print your report from within Cognos.

The default report format is PDF. This means your report will open within your browser in an embedded Adobe Reader. There is a print button in the upper right-hand corner of the Adobe Reader.

Printing a report that is in HTML format

1. Click the **View in PDF Format** button.



2. Select a printer (of use the default), and your report will print just as any other document.

Notes

Emailing Your Report

Emailing your reports is an easy, convenient way to distribute your report results. You have two opportunities to email these results:

1. After the report has run, or
2. While the report is running

You also have choices of who to email them too, and what you will email to them.

Who can I email my report results to?

1. You can email report results to people who have access to Cognos, and
2. You can email report results to those who do not.

What can I email to them?

1. You can "attach" a copy of the report results to them, or
2. You can send them a link to the results inside Cognos.

Considerations for Emailing Report Results

There are two issues you should consider before emailing report results:

1. Does the report contain confidential information?
2. Does the recipient have a security profile and permission to review the results?

The following table is intended to provide a set of guidelines for making your emailing decisions. It is not definitive. Ultimately, you know your business process and your business environment. Weave in a little common sense and make a decision **on what should be emailed to whom**.

Does the Recipient have...	Confidential Data	Non-Confidential Data
Banner Profile & Cognos Access	Include a Link	Include a Link
Banner Profile Only	Include the Report	Include the Report
No Banner Profile or Access	Do Not Email *	Include the Report

* Not everyone we do business with or interact with on a day-to-day basis is a Wayne State employee. And, indeed, they may have legitimate business reasons to have information. If you are in doubt as to whether an individual should see particular reports, consult your immediate supervisor or manager for guidance.

Important: When you email a report as an attachment, the report is now uncontrolled. You and each recipient are responsible for the security of its contents.

Emailing A Report

Email After the Report Has Run

After a report has run, and you are looking at the results, you may decide to email the results to one or more people. Follow these steps to accomplish this.

1. Click the **Keep this version** link, then **Email Report**.

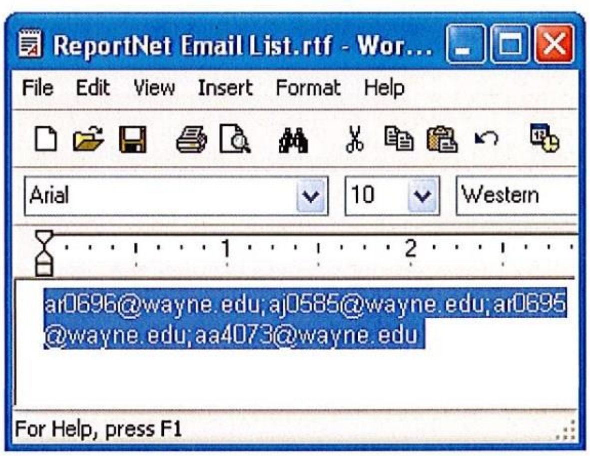
When the **Set the email options** page opens, you will find two areas in which you can enter email addresses.

The first allows you to select email addresses from a list after going through several steps to find it. The second area is an open text area where you can type the email address or addresses.

Unfortunately, neither area allows you to create and save a distribution list. Because of this, you'll have to recreate the distribution list every time you attempt to email.

So, here's a suggestion for a work-around:

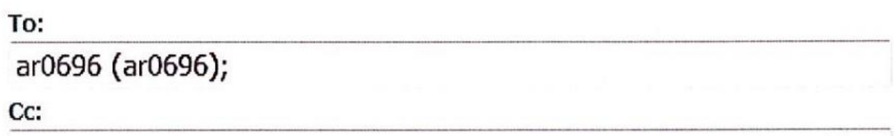
Create your distribution list in a word processor. Microsoft Word Pad works just fine. Separate recipients with a semicolon (;)



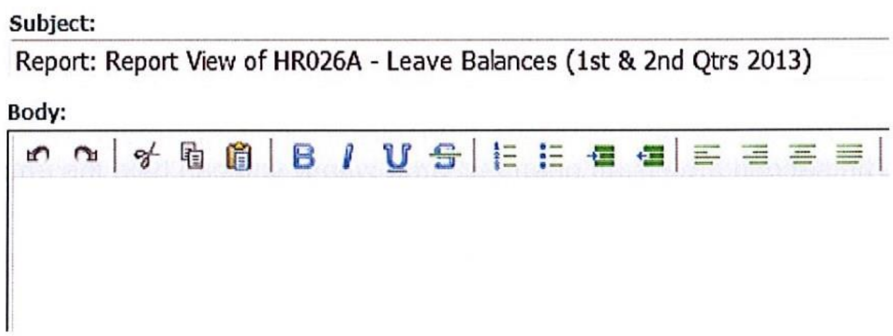
When you need email a report to this list, simply open the document, copy the list, and paste it into the email text area.

Our recommendation—it's easier to type the addresses.

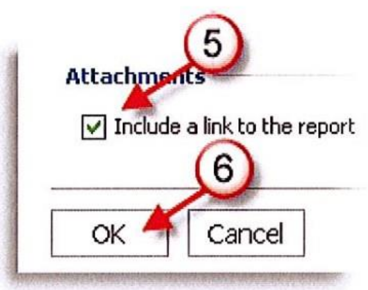
2. Enter email address into the **To** field(This field accepts all email address).



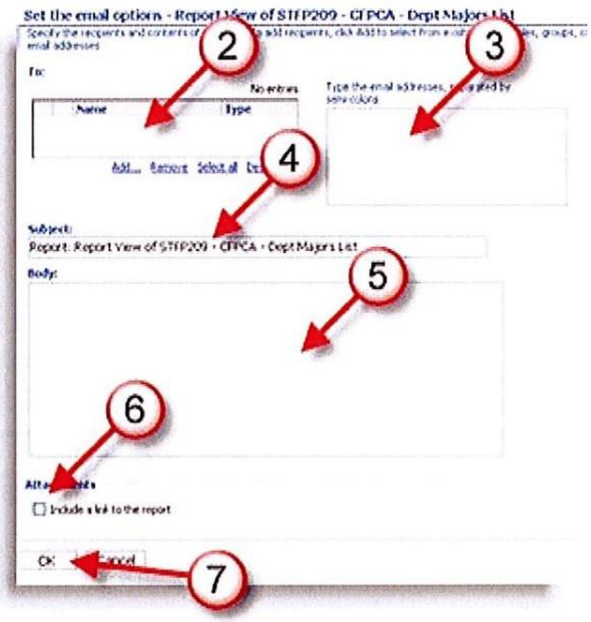
3. Edit the subject line if needed.
4. Enter body text (message) if needed.



5. Click **Include a link to the report** if required.
6. Click **OK**.



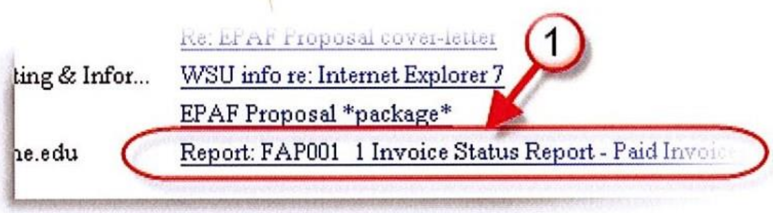
7. Click **OK**.



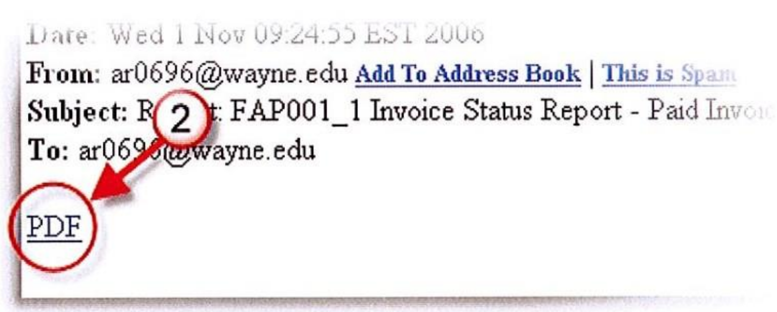
What does the email recipient see?

If you have included a link to the report, your recipient will do the following:

1. Click the subject line in the list of emails.



2. When the email opens, they will see any message you may have added and a link to the report. Click on the link.



3. The link will open the **Log on** screen for Cognos. They will enter their WSU AccessID and their Cognos password, then click OK.

4. After the log on occurs, Cognos will immediately run the report and the results will be displayed.

If you have **included the report**, they will follow the same steps 1 and 2 above except when they click the link a copy of the report will open.

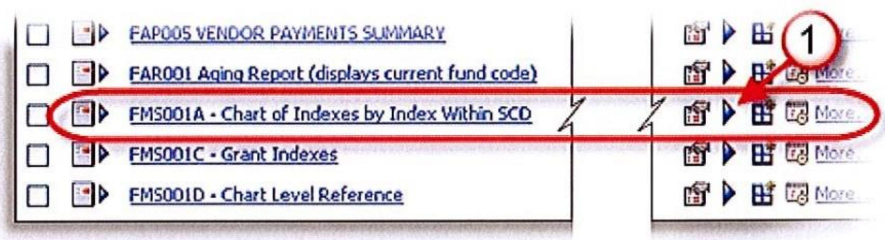
Exporting Report Data

Export to Microsoft Excel

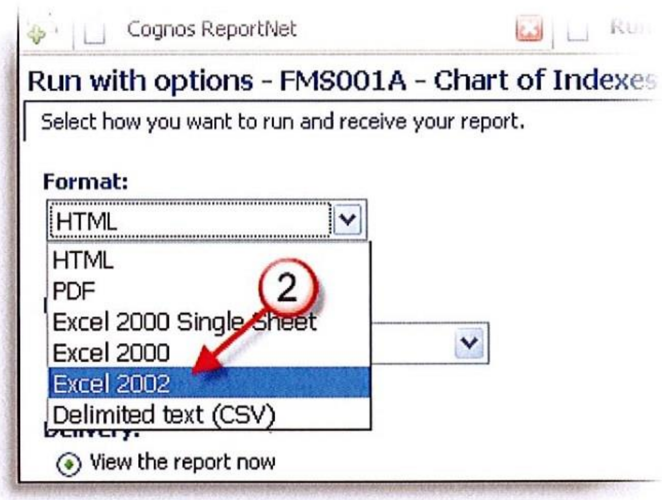
This procedure takes you through the steps for exporting your report results into an **.xls** format for use in Microsoft Excel. Exporting your data into an **xls** format retains the report formatting, e.g., header information, cell formatting, etc., with your report data.

Note: This article does not provide instruction on the formatting or manipulation of your data when opened in Excel.

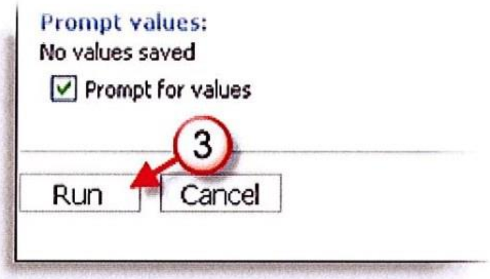
1. Select the report you want to export and click the corresponding **Run with options** icon. Do not click the report name to run the report. Clicking the report name will by-pass the options page.



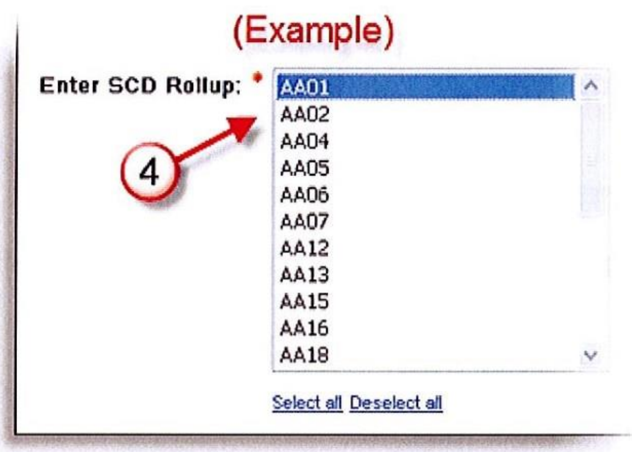
2. When the **Run with options** page appears, select an Excel format from the drop down list.



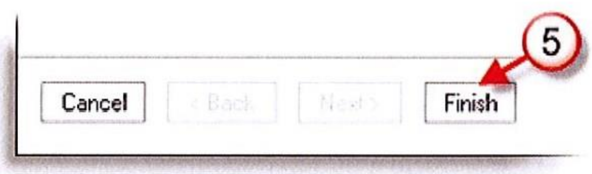
3. Click the **Run** button to run the report.



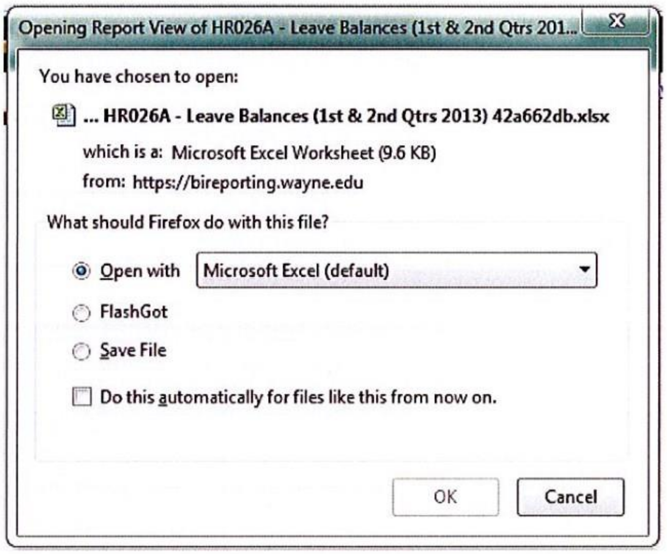
4. If your report does not require setting parameters, go to Step 6. If parameters are required, you will be prompted to set them before the report is run. Select your parameters.



5. Click the **Finish** button.



6. Because you ran your report requesting the results in an Excel format, your report will not open in your browser. Instead, a **File Download** dialog box will appear and you will have the option of opening or saving the file.



7. Your report data is now available to Microsoft Excel.

   Important: Your report data is "static." There is no dynamic link back to Cognos. Your results only reflect the data that was available on the day your report was run.

Notes

Scheduling Reports

Reports can be scheduled to run automatically when you want them to run, e.g. off-hours when there is less demand on the system.

You can schedule individual reports or group them together using a "job." Reports can be scheduled to run routinely by minute, hourly, daily, weekly, monthly, or yearly. After you create a schedule, the report or job runs at the time and date specified.

Reports and jobs can have only one scheduled run regardless of the frequency. If you need a report to run at a different time or with different parameters, you can create a Report View and schedule the Report View to run just as if it were the original report. Jobs have their own schedules, and these schedules are independent from report schedules.

Prompts in Scheduled Reports

If a report that contains prompts is scheduled, you must save the prompt values or specify default values to ensure that values exist when the report runs according to the schedule.

In a job, you can specify prompt values for job steps. When a report runs as part of a job, the prompt values saved in the job definition are used instead of the values saved with the report. If no values are specified in the job definition, Cognos uses the values saved in the report.

Schedule a Report

You can schedule a report to run at a later time or at a recurring date and time.

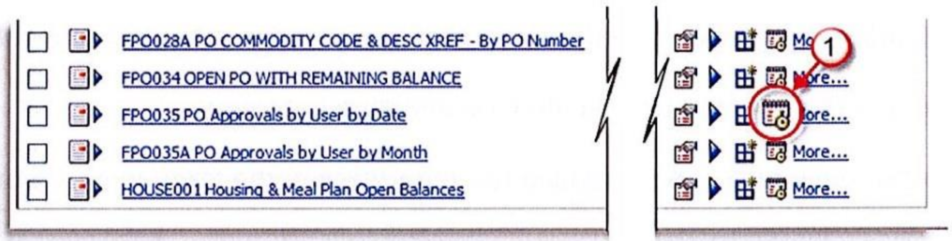
If you no longer need a schedule, you can delete it. You can also disable it without losing any of the scheduling details. You can then enable the schedule at a later time.

Cognos keeps history information and report outputs each time a report runs according to a schedule. You can specify how many occurrences to keep or for how long to keep them. For example, you can keep the history and report outputs for the ten latest occurrences or for schedules that ran in the last two months. Use the report history to see the times at which the reports ran and whether the reports ran successfully.

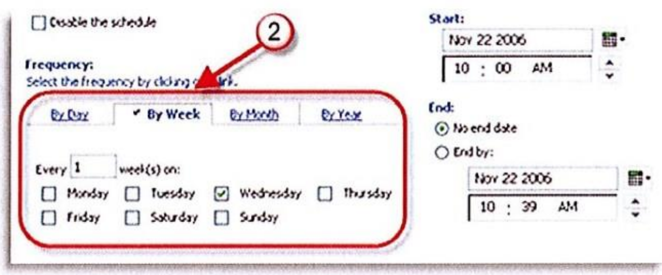
Scheduling A Report Run

To schedule a report to run:

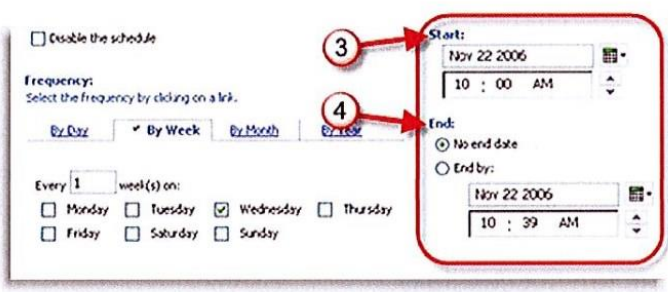
1. In **Public Folders** or **My Folders**, click the **Schedule** button for the report or report view you want to schedule.



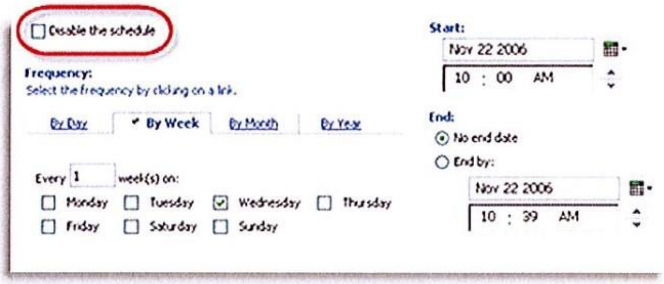
2. Under **Frequency**, select how often you want the schedule to run.



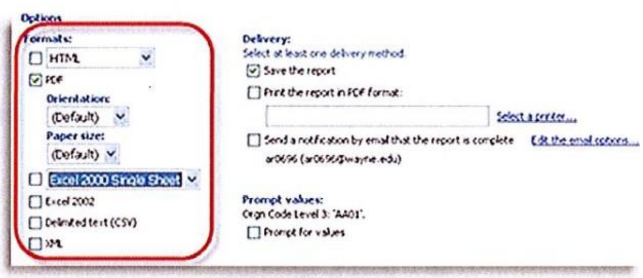
3. Under **Start**, select the date and time when you want the schedule to start.
4. Under **End**, select when you want the schedule to end.



Tip: If you want to create the schedule but not apply it right away, select the **Disable the schedule** check box. To later enable the schedule, uncheck the check box.



5. Under **Formats**, click the format you want for the report output.



6. Under **Delivery**, choose to save the report, print the report, or send the report by email.

Note: You must select at least one delivery method. The default is **Save the report**.

7. If you are scheduling your report to run from a Report View, the View has parameters saved with it. If you want to change the parameters, click the check box for **Prompt values**. The values that you choose will be used when the report runs.

8. Click **OK**.

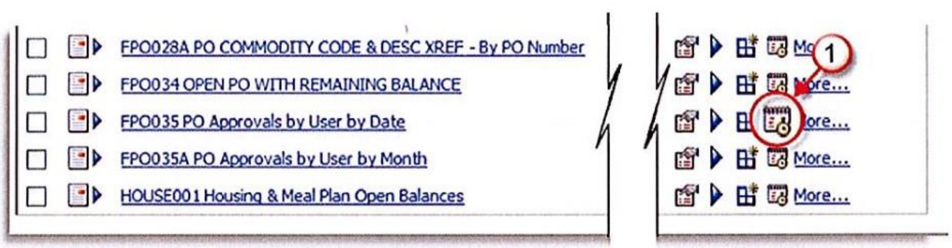
A schedule is created and the report will run at the next scheduled time.

<u>**Disabling A Scheduled Report**</u>

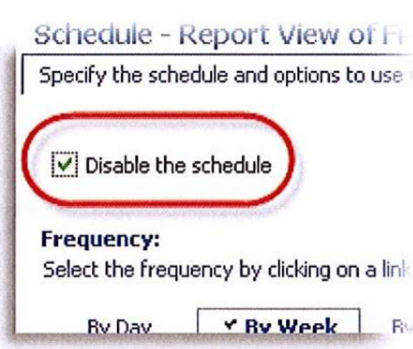
If you want to stop your scheduled report from running but do not want to delete the schedule from the system, you can just ***disable*** it. This will stop the report from running until you ***enable*** it to start the schedule once again.

To disable your scheduled report:

1. In **My Folders**, click the **Schedule** button for the report or report view you want to disable.



2. In the upper-left hand corner, click on the **Disable the schedule** checkbox.



3. Click **OK**.

Your schedule will be suspended until you uncheck the **Disable the schedule** checkbox.