PSHR WMU Electronic Workflow ~ User Guide 9.2 PeopleSoft

October 2017

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Overview of WMU Electronic Workflow Forms

<u>WMU Incidental Pay Form</u> – See Appendix G for Definitions
The WMU Incidental Pay Form has replaced the paper one-time-pay form. The types of payments that can be processed using an Incidental Pay are limited to the following:

- Academic Award**
- Automobile Lease Payments
- Clothing Allowance
- Faculty Award*
- Graduate Assistantship Lump Sum
- Grievance Settlements
- Taxable Housing Allowance
- Longevity
- Meal & Energy Allowance
- Named Professorship
- Phone Allowance
- Performance Incentive
- Shoe Allowance
- Staff Award**
- Student Award*
- Teaching Endorsement Program
- Training

An Incidental Pay Form can be submitted for an employee who has an active job record or had an active job record during the current or preceding calendar year.

An Incidental Pay Form cannot be used to pay an employee for work performed. Payment for hours worked of any type or duration must be processed using an online Temporary Appointment form.

***/**Note: *The Incidental Payments for Faculty Awards and Student Awards will be grossed up automatically. **Academic and Staff Awards can be grossed up upon request. (An Academic award should only be grossed up if it is paid by an Endowment). A grossed up payment will be exclusive of deductions; the payment amount entered will be the amount paid.**

Any payments that are grossed up must be processed manually by the Payroll department. Please contact the Payroll office to make arrangements to pick up the checks.

<u>WMU Temporary Faculty/Staff Appointment Form</u>
A Temporary Faculty/Staff Appointment Form is used to appoint individuals to a temporary assignment. Temporary appointments can be processed for individuals who have never worked for the University, for individuals who have held previous temporary or regular faculty/staff appointments, or for current benefits eligible WMU employees who will be performing temporary work in addition to their current appointment.

WMU Hourly Student Appointment Form

An Hourly Student Appointment Form is used to appoint WMU students to student jobs. Student appointments can be processed for students who have never worked for the University, for students who have held previous student appointments, or for current students who will be performing work in addition to their current student appointment. During the summer, the Hourly Student Appointment Form can also be used to hire and reappoint WMU students who are not enrolled during the summer sessions if 1) the student will be enrolled in the Fall semester or 2) the student had been enrolled in the previous Spring semester.

WMU Graduate Appointment Form

A Graduate Appointment Form is used to appoint WMU graduate students to Graduate College fellowships, associateships, and assistantships. Collectively, these awards are known as graduate appointments. Graduate students can be employed in teaching, research-discovery, and research-application positions. Appointment forms must be submitted for each semester/session worked.

Requesting User Access

To process a **PSHR WMU Electronic Workflow Form**, you must have online security access to the PeopleSoft WMU Workflow panels.

To obtain security access to the PeopleSoft WMU Workflow panels, complete and submit the **PSHR WMU Electronic Workflow Web Access Authorization** form located at: http://www.wmich.edu/hr/forms/access. Once you have been authorized, an e-mail will be sent to you with sign-on information.

If you are unable to access the authorization form, or if you have questions regarding user access, please contact Sara Anderson at sara.anderson@wmich.edu or 387-2984.

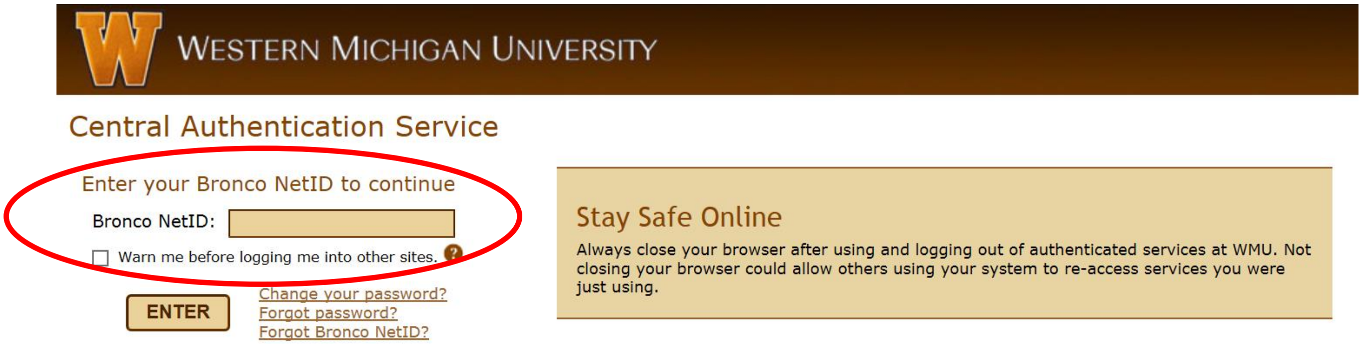
Web Browser Requirements

The PSHR WMU Electronic Workflow works best with Internet Explorer version 11.0. If you are using a Mac, the Safari browser seems to work best.

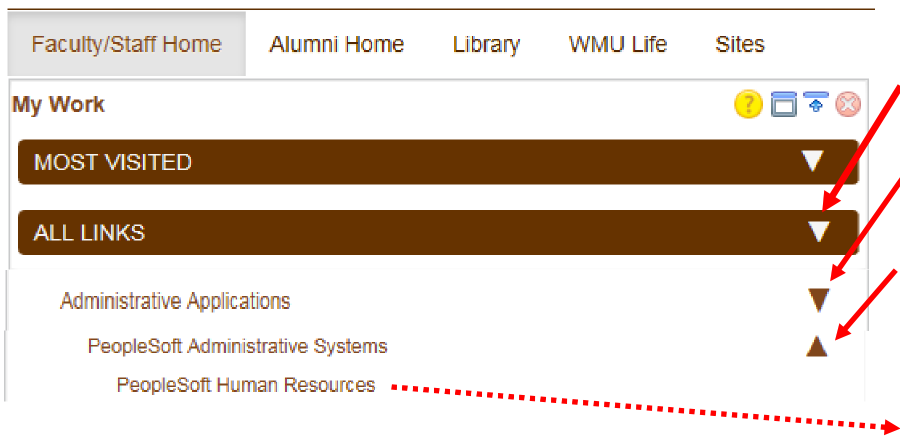
Accessing the WMU Electronic Workflow Form Panels

The Online Workflow forms are accessed by logging in through the GoWMU portal at: https://gowmu.wmich.edu/cp/home/displaylogin.

Use your Bronco NetID and password to sign in.



Once logged into GoWMU, you'll see the Faculty/Staff Home Tab.

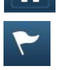


1. Click the All Links arrow.
2. Click the Admin Applications arrow.
3. Click the PeopleSoft Admin Systems arrow to get to the 'PeopleSoft Human Resources login' link.

Once you click the PeopleSoft HR link, PeopleSoft will open.

PeopleSoft Main Home Page

 - Home – Click on this icon to return to the Main PeopleSoft Home page

 - Notifications – Click on this icon to view actions and alerts

 - Actions List – Click on this icon Save Favorites and Sign Out

 - Nav Bar – Click on this icon to navigate to certain menu items (formerly the Main Menu). It contains Recent Places, My Favorites, Payroll, Personal Details and Benefits.

1) Clicking the Nav Bar Icon will display the drop down 'Main Menu' listings.

2) Click on the Navigator icon to get to the WMU Workflow Forms and Reports folders.

The Navigator menu opens

3) Click on the WMU Workflow menu item to get to the WMU Workflow Forms

OR the WMU Workflow Reports Folders.

Processing a WMU Incidental Pay Form – Initiator Role

Note: Fields marked by an asterisk (*) are required.

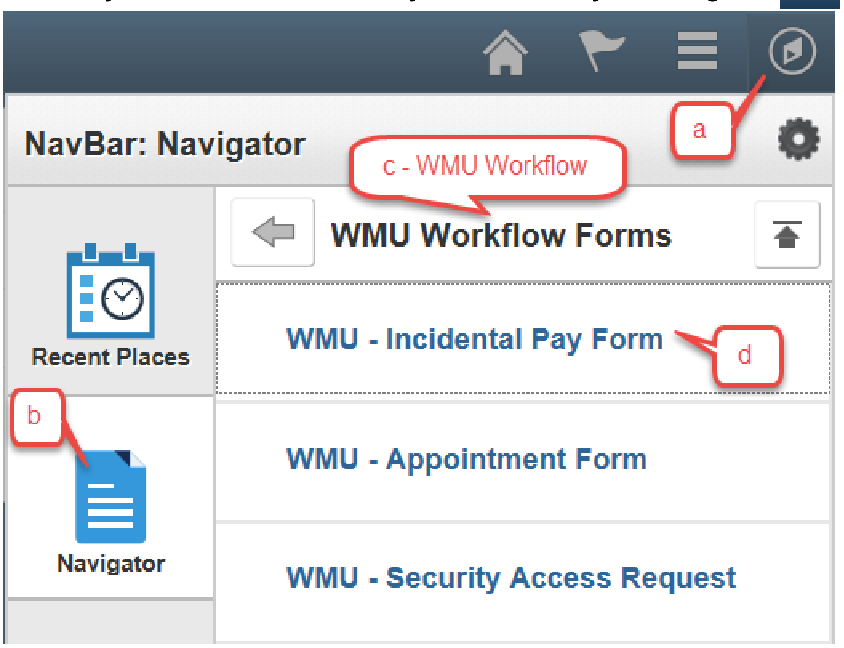
Note: If an Initiator submits multiple WMU Incidental Pay Forms during the same day, the Earnings Code and G/L Combo Code will automatically populate with data from the last form submitted.

1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

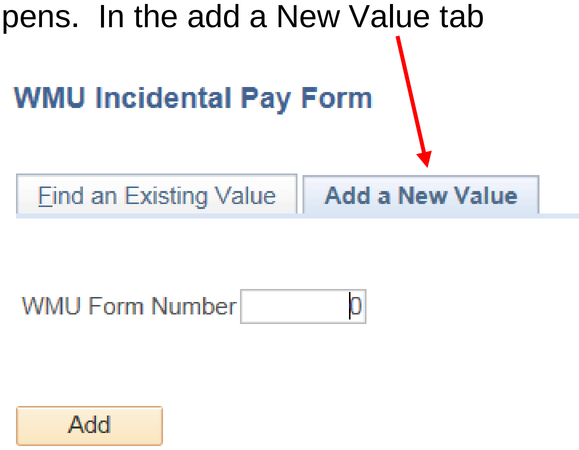
2) Access WMU Incidental Pay Form

a) 'Click' on Nav Bar icon  at the top right hand side of screen.
b) 'Click' on the Navigator menu item.
c) 'Click' on WMU – Workflow
d) 'Click' on WMU – Incidental Form
Optional- you can add this to My Favorites by clicking the  icon at the top right.



e) The WMU Incidental Pay Form page opens. In the add a New Value tab option, 'Click' Add.

Note: Do not enter a number in the WMU Form Number field. The system will automatically assign a form number when the Incidental Pay Form is submitted.



3) Complete Form - See APPENDIX A for Screen Shot

a) Enter the Employee's Employee ID number.
   i. *The Employee ID Number must be entered in order to complete the remainder of the form.*
   ii. *The employee's name and job title will automatically populate. Please confirm you have the correct employee.*

Note: If the Employee ID entered is not valid, the system will display an error message. Department must verify Employee ID with employee.

b) Enter the Earnings Code.
   i. *'Click' on the looking glass icon to search and select appropriate code.*
   ii. *The Account (formally known as Object Code) will automatically populate based on the Earnings Code selected.*

c) Enter the G/L Combo Code to which the Incidental Pay is to be charged.
   - *G/L Combo Code = Fund + Department + Account (Account defaults upon selection of Earnings Code).*
   - *The Department and Executive Area associated with the Combo Code will automatically populate once the G/L Combo Code has been entered.*

d) Enter Payment Amount.
   i. *Enter full payment amount – DO NOT enter an hourly rate.*
   ii. *Enter Payment Amount using dollars and cents (e.g. 1000.00; 122.50).*

e) Check Gross-up Box (only available for the following Incidental Payments):
   i. *Academic Awards, and Student Awards will be grossed up automatically.*
   ii. *Faculty and Staff Awards can be grossed up upon request.*

   Note: Any payments that are grossed up must be processed manually by the Payroll department. Please contact the Payroll office at (269) 387-2935 to make arrangements to pick up the checks.

f) Add Comments.
   i. *Use the comments section for noting specific details about the payment.*

4) Review the form

a) Carefully review the form prior to submittal.

5) Submit Form

a) 'Click' the 'Save' button at the bottom of the panel.
   i. *The Incidental Pay Form will automatically be routed to the appropriate approver(s)'s Push Notifciation list.*

b) The WMU - Incidental Pay Form ID number will appear at the top of the panel when "Saved".
   i. *The WMU - Incidental Pay Form ID number is needed for tracking purposes.*

c) The Status and Status Date at top of panel will update once the form is "Saved".
   i. *A Status of "Routed for Approval" indicates that the form has been successfully submitted.*

d) The Date submitted, Time submitted and Who submitted the form will appear in the “Process Log” box.
   i. See TRACKING WMU ELECTRONIC WORKFLOW FORMS for information on how to find out where a form is in the routing process.

e) **Make sure the form routes to whom you are expecting it to. If it is a new f/cc, then HRMS Tree Manager will show first and this is ok**.

Note: The Initiator has the ability to cancel a WMU Incidental Pay at any time during the approval process. The WMU Incidental Pay cannot be canceled once it has been loaded to the pay sheet. If it is necessary to cancel an Incidental Pay after it has been loaded to the pay sheet, contact the Payroll office (269) 387-2935.

Processing a WMU Temporary Faculty/Staff Appointment Form – Initiator Role

Note: Fields marked by an asterisk (*) are required.

Note: If an Initiator submits multiple WMU Temporary Faculty/Staff Appointment Forms during the same day, the Appointment Type, Job Code, Salary Administration Plan, Charge To G/L Combo Code, Location and WMU Mail Stop will automatically populate with data from the last form submitted.

Note: Hourly vs Salary – Employees not holding faculty rank must be paid hourly. See Appendix C **for appointment type definitions.**

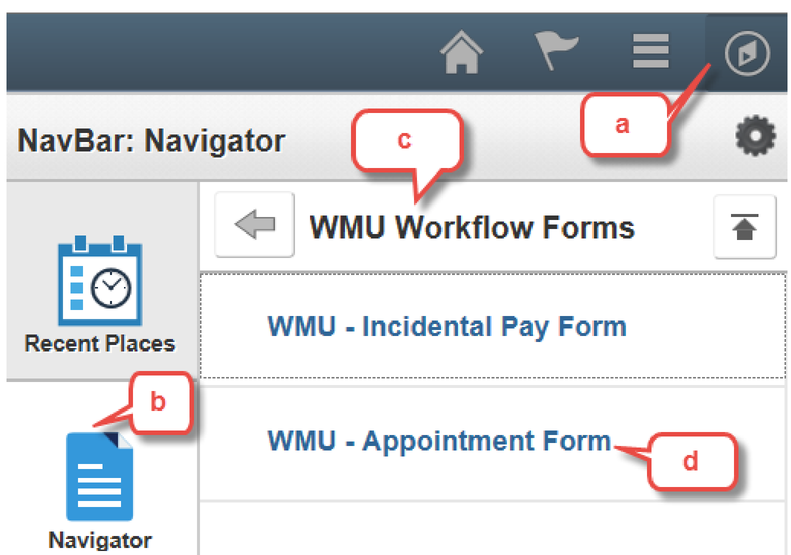
1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

2) Access WMU Temporary Faculty/Staff Appointment Form

a) ‘Click’ on Nav Bar icon  at the top right hand side of screen.
b) ‘Click’ on the Navigator menu item.
c) ‘Click’ on WMU – Workflow
d) ‘Click’ on WMU – Appointment Form

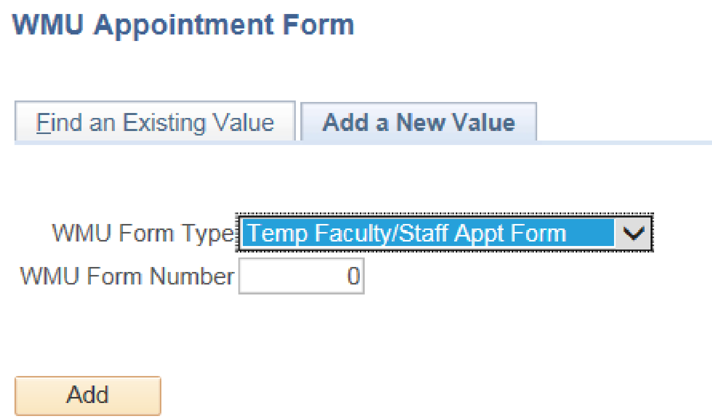
Optional- you can add this to My Favorites by clicking the  icon at the top right.



e) The WMU Appointment form page opens. Select the Temp Faculty/ Staff Appt Form from the WMU Form Type drop down box.

f) ‘Click’ Add.

Note: Do not enter a number in the WMU Form Number field. The system will automatically assign a form number when the Temporary Faculty/Staff Appointment Form is submitted.



3) Complete Form - See APPENDIX A for Screen Shot

a) Enter the Employee’s Employee ID or Social Security Number.
   i. *An Employee ID or Social Security Number must be entered in order to complete the remainder of the form.*
   ii. *A WIN can also be entered.*

Note: If you enter the Employee ID for a current employee, the Name fields, and the last four digits of the employee’s social security number will automatically populate. If these fields do not automatically populate, the department must verify the Employee ID with the employee.

Note: If the Employee ID entered is not valid, the system will display an error message. The department must verify the Employee ID with the temporary employee.

Note: If you enter the Social Security Number for a current WMU employee, the Name Fields, I-9 Date and Employee ID will automatically populate. If these fields do not automatically populate, the department must verify the Social Security Number with the employee.

b) Enter Remaining Appointee Information.

Note: If the Employee is a new hire with no previous WMU employment record, the initiator will be required to enter a birth date and home address. These fields will be visible to ONLY the initiator and HR.

c) Enter Appointment Information (*See Appendix C).*
   i. *Enter Appointment Type. ‘Click’ on the looking glass icon to search and select appropriate code. This will bring up all appointment types available.*
   ii. *To look at specific appointment types, type in the first letter of a three-digit assignment type.*

   Example: Type ‘H’ in Assignment Type search field to find hourly appointment types only. F = Faculty, S = Salaried (exempt), H = Hourly (non-exempt).

iii. To assist initiators, an edit has been added to the initiation process to help the Form Initiator select the correct appointment type, relative to the employee's benefits eligibility.

- *If the appointee DOES have an active Benefits Eligible primary job on the database, and the initiator chooses a non-benefits eligible appointment type, a message will pop up:*

  "ERROR-This employee is benefits eligible; please select the benefits eligible appointment type."

  The form will not save until the initiator selects a new appointment type with a benefits eligible descriptor.

- *If the appointee DOES NOT have an active Benefits Eligible primary job on the database, and the initiator chooses a benefits eligible appointment type, a message will pop up:*

  "ERROR-This employee is Not benefits eligible; please select the Non benefits eligible appointment type."

  The form will not save until the initiator selects a new appointment type with a non benefits eligible descriptor.

iv. The Job Code, Salary Admin Plan, and Grade/Rank will automatically populate once the Appointment Type has been entered.

v. Enter Appointment Begin Date and Appointment End Date. The Appointment Begin Date and Appointment End Date may automatically populate depending on the Appointment Type selected.

Example: If you are entering a part-time faculty appointment for Fall semester, the Fall semester begin and end dates will automatically populate. If you need to change one or both of the dates, the new date(s) need to fall within the semester timeframe, or you will receive an error message.

Note: For adjunct faculty, visiting professors, part-time instructors, additional faculty appointments and overload appointments, credit hours need to be entered. The FTE will populate once the credit hours are entered.

d) Enter Pay Rate.

i. Hourly Appointments - Enter Payment Amount using dollars and cents.

Example: If the employee's hourly pay rate is eight dollars and thirty cents, the Pay Rate should be entered as: $8.30.

ii. Salaried Appointments - Enter Payment Amount using whole dollars, do <u>not</u> include cents.

Example: If the employee's salary is five hundred dollars, the Pay Rate should be entered as: $500.

iii. Salaried Appointments – Enter the payment amount based on the time frame being worked.

Example: If the employee should receive $8000 for 3 months work, enter $8000. Do <u>not</u> enter monthly or biweekly salaries.

iv. *Part Time Instructor (PIO & Non-PIO) Appointments – Enter the appropriate pay components (Base, Other) in the 'Pay Component' section. The type is entered in the 'Rate Code' box and the dollar amount is entered in the 'Comp Rate' box.*

v. *Enter amount(s) in whole dollars.*

vi. *To get additional component rows, click the '+' box at the end of the row. This will add a new row for entry. To delete unwanted rows, click the '-' button at the end of the row.*

vii. *Once all pay components have been entered, **you must click the yellow 'Calculate Compensation' button.** The total amount will then auto populate in the 'Pay Rate' box.*

Example: The PIO member will receive a total of $4000 for the semester. Pay Components could be entered as follows:

Base	**$3000**
Other	**$1000**

Click the 'Calculate Compensation' button to get the total of $4000 to appear in the 'Pay Rate' box.

Example 2: The non- PIO member will receive a total of $2250 (base only) for the semester. Pay Component would be entered as follows:

Base	**$2250**

Click the 'Calculate Compensation' button to get the rate of $2250 to appear in the 'Pay Rate' box.

e) Enter the G/L Combo Code to which the Temporary Appointment is to be charged.

i. *G/L Combo Code = Fund + Department + Account (Account defaults upon selection of Appointment Type).*

ii. *Once the G/L Combo Code is entered, the Location and WMU Mail stop will automatically populate.*

Note: You may change the Location and WMU Mail stop if they are different than the default values.

f) Enter Work Phone

i. *Enter the employee's work number.*

g) Enter Description of Work.

i. *Provide specific details about the payment.*

Example: This employee will be typing draft grant proposals, preparing presentation materials, and completing other project clerical work as needed.

Note: The Description of Work field is limited to 254 characters. Since there is no automatic stop, the system will still allow initiators to key more than 254 characters.

If an initiator enters more than 254 characters into the Description of Work field, a message will be displayed, notifying the initiator that the text has been truncated. This message will only display in the following two cases:

a) If the initiator tabs out of the Description of Work field. The initiator may modify the description before the form is saved. If necessary, additional notes can be made in the Comments field.

b) If the initiator saves the form while the cursor is still located in the Description of Work field, the form is routed without giving the initiator an opportunity to modify text or to enter additional Comments.

h) For faculty positions, 'Check' the Signed Letter of Offer on File box and type in the location of the letter.
   i. *Provide department name for the location of letter.*

4) Review the form

a) Carefully review the form prior to submittal. Once the form is submitted, it is routed immediately to the Approver's Push Notification List.

5) Submit Form

a) 'Click' the 'Save' button at the bottom of the panel.
   i. *The WMU Temporary Faculty/Staff Appointment Form will automatically be routed to the appropriate approver(s).*

b) The WMU – Temporary Faculty/Staff Appointment Form ID number will appear at the top of the panel when "Saved".
   i. *The WMU Temporary Faculty/Staff Appointment Form ID number is needed for tracking purposes.*

c) The Status and Status Date at top of panel will update once the form is "Saved".
   i. *A Status of "Routed for Approval" indicates that the form has been successfully submitted.*

d) The Date submitted, Time submitted and Who submitted the form will appear in the 'Process Log' box.
   i. *See **Tracking WMU Electronic Workflow Forms** for information on how to find out where a form is in the routing process.*

Note: The Initiator has the ability to cancel a WMU Temporary Faculty/Staff Appointment Form at any time during the approval process. However, the WMU Temporary Faculty/Staff Appointment Form cannot be canceled using the PSHR Electronic Workflow System once it has been entered. To cancel an appointment or to make changes or corrections once a WMU Temporary Faculty/Staff Appointment Form has been entered, a paper temporary Transaction form must be processed. To request a temporary transaction form, please send an email request to Human Resources via hr-hris@wmich.edu. Please include the employee's name, employee ID and G/L combo code in the e-mail request.

Note: If you submit an hourly temporary appointment form with an end date that falls within a pay period that has already been processed and paid, the Initiator will receive an e-mail reminder after the form has been entered into PeopleSoft informing them that a Kronos Correction form must be completed in order to pay the employee.

Note: Once the temporary appointment end date has expired, a NEW Temporary Faculty/Staff Appointment Form must be processed. You can no longer extend a temporary appointment using a paper temporary transaction form.

> **Example: An employee is hired from 7/1/06 to 12/31/06 for $7000. A NEW temporary appointment form must be submitted for any work done after 12/31/06.**

6) Receipt of E-mail Messages

a) When the form has completed the approval process and is entered to the database, the initiator will receive an e-mail notifying him/her that the form has been entered by HR. The form is now ready for payroll processing.
   - If the employee needs to complete a Form I-9, the e-mail will also include a message indicating this. The employee will need to check his/her e-mail for a notice from HR-HRIS containing I-9 Instructions.

b) If the form is recycled, the initiator will receive an e-mail notifying him/her that a form is pending on his/her Push Notifications for rework.

c) If the form is denied, the initiator will receive an e-mail notifying him/her that a form has been stopped and is no longer being processed.

d) If you or the next approvers receive an email message with a subject of Timeout Push Notification List, go to this section: Accessing a Timeout Push Notification Item

Processing a WMU Hourly Student Appointment Form – Initiator Role

Note: Fields marked by an asterisk (*) are required.

Note: If an Initiator submits multiple WMU Student Appointment Forms during the same day, the Appointment Type, Salary Administration Plan, Charge To G/L Combo Code, Location, WMU Mail Stop and Description of Work will automatically populate with data from the last form submitted.

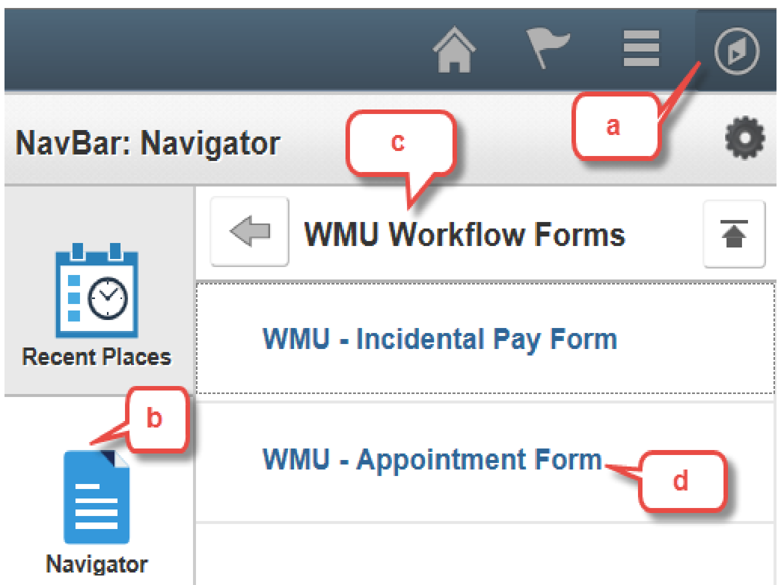
1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

2) Access WMU Student Appointment Form

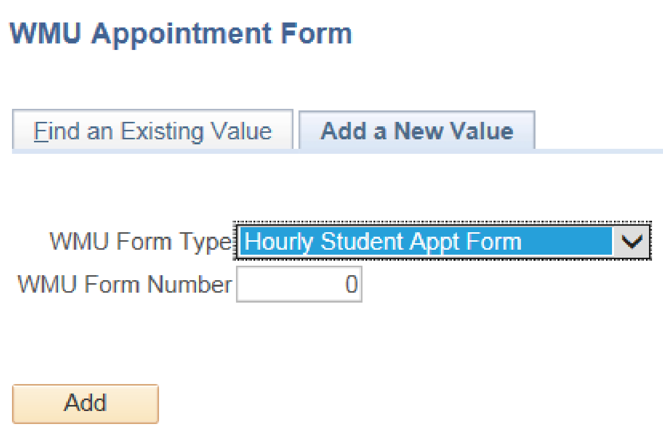
a) 'Click' on Nav Bar icon at the top right hand side of screen.
b) 'Click' on the Navigator menu item.
c) 'Click' on WMU – Workflow
d) 'Click' on WMU – Appointment Form

Optional- you can add this to My Favorites by clicking the icon at the top right.



e) The WMU Appointment form page opens. Select the Hourly Student Appt Form from the WMU Form Type drop down box.
f) 'Click' Add.

Note: Do not enter a number in the WMU Form Number field. The system will automatically assign a form number when the Hourly Student Appointment Form is submitted.



3) Complete Form - See APPENDIX A for Screen Shots

a) Enter the Student Employee's WIN.
   i. If the WIN entered does not exist in Banner, an error message will be displayed and the form cannot be submitted.
   - *If the person is NOT a WMU student, a temporary appointment form should be processed.*
   - *If the person is a WMU student, verify/re-enter WIN. If error still persists, confirm WIN with student/Registrar's office.*

Note: Once the WIN is entered, if a PeopleSoft Employee ID exists, the name fields and the last four digits of the student employee's social security number field will automatically populate. If an international student does not have a social security number yet, visit wmich.edu/hr/student-international for more details.

Note: If a PeopleSoft Employee ID does not exist, a message will be displayed instructing the initiator to enter the student employee's social security number.

Note: If the social security number entered on the form does not match the student employee's social security number on Banner, an error message will be displayed and the form cannot be submitted. If the SSN entered on the form is verified as correct, the student must go to the Registrar's office to get the SSN discrepancy resolved on Banner before the form can be submitted.

Note: If the Employee is a new hire with no previous WMU employment record, the initiator will be required to enter a birth date and home address. These fields will be visible to ONLY the initiator and HR.

b) Enter Appointment Information (*See Appendix C).*
   i. *Enter Appointment Type.*
   - *'Click' on the looking glass icon to search and select appropriate code. Currently, only one Appointment Type (001) exists for Hourly Student appointments.*

NOTE: Employees who hold a benefits eligible job cannot be hired into a student position.

   - *If the appointee DOES have an active Benefits Eligible primary job on the database, and the initiator chooses the Hourly Student appointment, a message will pop up:*

     "ERROR – The employee is benefits eligible and cannot be hired as a student. Please submit a Temporary Appointment form."

     The initiator will need to exit the Hourly Student appointment form and select the WMU Form Type of 'Temp Faculty/Staff Appt Form' and choose a benefit eligible appointment type.

   - *The Salary Admin Plan (STU), Appointment Period (fiscal year), Compensation Frequency (hourly),and Account (3511) will automatically populate once the Appointment Type has been entered.*

   ii. Enter Appointment Begin Date.
   iii. Enter Appointment End Date.

- *For student non-grant appointments, an end date is NOT required and may be left blank.*
- *The end date IS required for grant funded appointments.*

iv. *Enter Job Code.*
- *'Click' on the looking glass icon to search all available Job Codes.*
- *Select appropriate code from list.*

Note: Because of KRONOS functionality, the same job code and same GL Combo code cannot be used for more than one job. If an active job already exists on the system with the same selected job code/GL combo code, an error message will be displayed and the form cannot be submitted. If this appointment is for a different job choose a different job code and resubmit the form. If an attribute about the current job needs to be changed, maybe a transaction for is needed. Questions can be directed to hr-hris@wmich.edu.

v. *Enter Grade.*
- *'Click' on the looking glass icon to search and select appropriate Grade.*
- *You may also enter the grade without using the looking glass icon.*

vi. *Enter Step.*
- *'Click' on the looking glass icon to search and select appropriate Step.*
- *You may also enter the step without using the looking glass icon.*

vii. *Review Pay Rate.*
- *A default hourly pay rate exists for Grades/Steps A/1 through D/4; the pay rate field will automatically populate with the default rate. You will not be able to change the pay rate if it is defaulted, so please verify this is the grade/step/rate at which you wish to pay.*
- *To pay above the D/4 grade/step, a grade of 'Q' must be entered in the Grade field. Then enter the pay rate in the Pay Rate field.*
  - *Enter Pay Rate using dollars and cents (e.g. 10.00, 12.55, etc).*

c) Review/Enter Work Study.

i. *Click appropriate button to indicate whether Work Study funds should be used to pay the student.*

ii. *Clicking the 'Yes' button means that a student will be paid from Work Study money only if work study funds are available. If funds are available, the system will automatically select the correct work study award from which the student will be paid.*

d) Enter the G/L Combo Code to which the Hourly Student Appointment is to be charged.

i. *G/L Combo Code = Fund + Department*
- *Account (object code) defaults to 3511*

ii. *Once the G/L Combo Code is entered, the Location and WMU Mail stop will automatically populate.*

e) Enter Description of Work.

i. *The description of work is only required for Grade Q appointments.*

ii. *Provide specific details about the payment.*

Example: This employee will be typing draft grant proposals, preparing presentation materials, and completing other project clerical work as needed.

Note: The Description of Work field is limited to 254 characters. Since there is no automatic stop, the system will still allow initiators to key more than 254 characters. If an initiator enters more than 254 characters into the Description of Work field, a message will be displayed, notifying the initiator that the text has been truncated. This message will only display in the following two cases:

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   i. *See **Tracking WMU Electronic Workflow Forms** for information on how to find out where a form is in the routing process.*

Note: The Initiator has the ability to cancel a WMU Student Appointment Form at any time during the approval process. However, the WMU Student Appointment Form cannot be canceled using the PSHR Electronic Workflow System once it has been authorized. To cancel an appointment or to make changes or corrections once a Student Appointment form has been authorized, a Student Transaction form must be submitted through the Student Employment Online Transactions (SEOT) system.

Note: If you submit a student appointment form with an end date that falls within a pay period that has already been processed, the Initiator will receive an e-mail reminder after the form has been entered into PeopleSoft informing them that a Kronos Correction form must be completed in order to pay the employee.

Note: Once the appointment end date has expired, a NEW Hourly Student Appointment Form must be processed.

Example: A student is hired from 7/1/09 to 12/31/09 for $10.00. A NEW student appointment form must be submitted for any work done after 12/31/09.

Note: If a student employee has not been paid in a G/L Combo Code for over six months, the student will be terminated via an automatic mass termination process. A new WMU Student Appointment Form must be processed to put the student back on the payroll.

6) Receipt of E-mail Messages

a) When the form has completed the approval process and is entered to the database, the initiator will receive an e-mail notifying him/her that the form has been entered by HR. The form is now ready for payroll processing.
    - If the employee needs to complete a Form I-9, the e-mail will also include a message indicating this. The employee will need to check his/her e-mail for a notice from HR-HRIS containing I-9 instructions.

b) If the form is recycled, the initiator will receive an e-mail notifying him/her that a form is pending on his/her Push Notification List for rework.

c) If the form is denied, the initiator will receive an e-mail notifying him/her that a form has been stopped and is no longer being processed.

Note: If you or the next approvers receive an email message with a subject of Timeout Push Notification List, go to this section: Accessing a Timeout Push Notification List

Processing a WMU Graduate Appointment Form – Initiator Role

Note: Fields marked by an asterisk (*) are required.

Note: If an Initiator submits multiple Graduate Appointment Forms during the same day, the Appointment Type, Appointment Dates, Pay Rate, Charge To G/L Combo Code, Location, and Description of Work will automatically populate with data from the last form submitted.

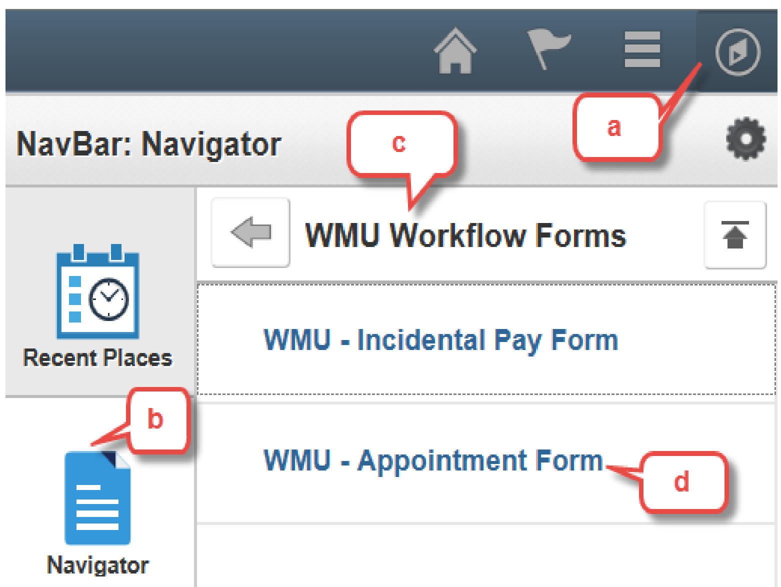
1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

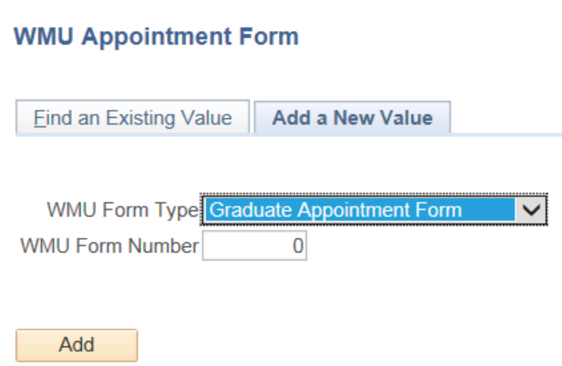
2) Access WMU Graduate Appointment Form

a) 'Click' on Nav Bar icon at the top right hand side of screen.
b) 'Click' on the Navigator menu item.
c) 'Click' on WMU – Workflow
d) 'Click' on WMU – Appointment Form

Optional- you can add this to My Favorites by clicking the icon at the top right.



e) The WMU Appointment form page opens. Select Graduate Appt Form from the WMU Form Type drop down box.
f) 'Click' Add.



Note: Do not enter a number in the WMU Form Number field. The system will automatically assign a form number when the Hourly Student Appointment Form is submitted.

3) Complete Form - See Appendix A for Screen Shot; See Appendix B for Definitions

a) Enter the Student Employee's WIN.
   i. *If the WIN entered does not exist in Banner, an error message will be displayed and the form cannot be submitted.*
      - *If the person is NOT a WMU student, a temporary appointment form should be processed.*
      - *If the person is a WMU student, verify/re-enter WIN. If error still persists, confirm WIN with student/Registrar's office.*

Note: Once the WIN is entered, if a PeopleSoft Employee ID exists, the name fields, the Employee ID, and the last four digits of the student employee's social security number field will automatically populate. If an international student does not have a social security number yet, visit wmich.edu/hr/student-international for more details

Note: If a PeopleSoft Employee ID does not exist, a message will be displayed instructing the initiator to enter the student employee's social security number.

Note: If the social security number entered on the form does not match the student employee's social security number on Banner, an error message will be displayed and the form cannot be submitted. If the SSN entered on the form is verified as correct, the student must go to the Registrar's office to get the SSN discrepancy resolved on Banner before the form can be submitted.

Note: If the Employee is a new hire with no previous WMU employment record, the initiator will be required to enter a birth date and home address. These fields will be visible to ONLY the initiator and HR.

b) Enter Appointment Information
   i. *Enter Appointment Type.* See Appendix C for a list of appointment code options or,
      - *'Click' on the looking glass icon to search and select appropriate code. Codes are set up by Job Title, Grade (Full, ¾ appt, 2/3 appt, ½ appt), semester (Summer II, Fall, Spring, Summer I) and GA type (Teaching-GAT, Research-Application-GAN, Research-Discovery-GAR).*
      - *The Appointment Period, Job Code, Salary Admin Plan (GAx), Grade, FTE, Pay Rate, and Account (3192) will automatically populate once the Appointment Type has been entered.*
      - *The Appointment Begin Date and Appointment End Date will also automatically populate.*
         - *You may change appointment begin and end dates. HOWEVER, the dates can only fall within the designated semester/session date parameters.*

Example: For Spring 2010, the date parameters are 1/11/10 and 5/4/10. You can change the begin date to 1/20/10, but NOT 1/5/10. You can change the end date to 4/20/10, but NOT 6/1/10.

Note: Because of KRONOS functionality, the same job code and same GL Combo code cannot be used for more than one job. If an active job already exists on the system with the same selected job code/GL combo code, an error message will be displayed and the form cannot be submitted. Contact Human Resources for assistance.

ii. Review Grade.

- *Make sure you have the correct grade (funding level) selected (Full, ¾, 2/3 or ½)*
  - *If grade is not correct, go back to the Form Appointment Type and select the correct Appointment Type combo.*

iii. Review Pay Rate (e.g. salary/stipend).

- *A default pay rate exists for all graduate appointments.*
  - *You may change the pay rate for an appointment. However, the pay rate should not be less than the minimum for the grade.*
  - *If changing a pay rate, enter Payment Amount using whole dollars, do <u>not</u> include cents.*
  - *If entering a salary/stipend amount different from the default rate, the reason for the change should be noted in the 'Comments' section.*
- *To determine the appropriate pay rate for a late Graduate Appointment, please contact the Graduate College for assistance.*

c) Enter the G/L Combo Code to which the Graduate Appointment is to be charged.

i. G/L Combo Code = Fund + Department

- *Account (object code) defaults to 3192.*

ii. Once the G/L Combo Code is entered, the Location and WMU Mail stop will automatically populate.

d) Enter Description of Work.

i. The description of work is required.

ii. Provide general details about the appointment.

Example: This employee will be typing draft grant proposals, preparing presentation materials, and completing other project work as needed.

Note: The Description of Work field is limited to 254 characters. Since there is no automatic stop, the system will still allow initiators to key more than 254 characters. If an initiator enters more than 254 characters into the Description of Work field, a message will be displayed, notifying the initiator that the text has been truncated. This message will only display in the following two cases:

a) If the initiator tabs out of the Description of Work field. The initiator may modify the description before the form is saved. If necessary, additional notes can be made in the Comments field.

b) If the initiator saves the form while the cursor is still located in the Description of Work field, the form is routed without giving the initiator an opportunity to modify text or to enter additional Comments.

e) Enter Signed Letter of Offer on File

i. *The Graduate College requires a Letter of Offer to be on file with the Graduate College for all Graduate Appointments, **and as of summer II 2014, a funding source acronym in the Location of Letter field (see iv.).***

ii. Form will be stopped if the 'Signed Letter of Offer on File' is not checked.

iii. If form is routed to the Graduate College and no Letter of Offer is on file with the Graduate College (even if the box is marked), the form will be stopped until the letter has been forwarded to the Graduate College.

iv. *Enter the Location of Letter as an Acronym (**see table below for example**)*
   - *If no location is noted on form, the form will be stopped.*
   - *Ex: (G)ENG/GC or (GC)BLV/GC*

Acronym	Meaning
(D) _ _ _ _ /GC	(Department funded), 2-4 digit hiring departments acronym and Graduate College
(GC) _ _ _ _ /GC	(Graduate College funded), 2-4 digit hiring departments acronym and Graduate College *No longer PGC as of Fall 2017
(G) _ _ _ _ /GC	(Grant funded), 2-4 digit hiring departments acronym and Graduate College

4) Review the form

a) Carefully review the form prior to submittal. Once the form is submitted, it is routed immediately to the Approver's Push Notification List.

5) Submit Form

a) 'Click' the 'Save' button at the bottom of the panel.
   i. *The WMU Graduate Appointment Form will automatically be routed to the appropriate approver(s).*

b) The WMU – Graduate Appointment Form ID number will appear at the top of the panel when "Saved".
   i. *The WMU Graduate Appointment Form ID number is needed for tracking purposes.*

c) The Status and Status Date at top of panel will update once the form is "Saved".
   i. *A Status of "Routed for Approval" indicates that the form has been successfully submitted.*

d) The Date submitted, Time submitted and Who submitted the form will appear in the 'Process Log' box.
   i. *See **Tracking WMU Electronic Workflow Forms** for information on how to find out where a form is in the routing process.*

Note: The Initiator has the ability to cancel a WMU Graduate Appointment Form at any time during the approval process. However, the WMU Graduate Appointment Form cannot be canceled using the PSHR Electronic Workflow System once it has been authorized. To cancel an appointment or to make changes or corrections once a Graduate Appointment form has been authorized, a Grad Assistantship Transaction form must be submitted through the Student Employment Online Transactions (SEOT) system.

Note: Graduate Appointment forms must be submitted for each semester/session worked, and appointment begin and end dates must fall within the specified semester/session date parameters.

- **If a Graduate appointee needs to work prior to or between semester/sessions dates, an Hourly Student Appointment form should be**

processed to place the Graduate appointee on the payroll for the additional time worked.

6) Receipt of E-mail Messages

a) When the form has completed the approval process and is entered to the database, the initiator will receive an e-mail notifying him/her that the form has been entered by HR. The form is now ready for payroll processing.
   - If the employee needs to complete a Form I-9, the e-mail will also include a message indicating this. The employee will need to check his/her e-mail for a notice from HR-HRIS containing I-9 instructions.

b) If the form is recycled, the initiator will receive an e-mail notifying him/her that a form is pending on his/her Push Notification List for rework.

c) If the form is denied, the initiator will receive an e-mail notifying him/her that a form has been stopped and is no longer being processed.

Note: If you or the next approvers receive an email message with a subject of Timeout Push Notification List, go to this section: Accessing a Timeout Push Notifiction List

Processing WMU Electronic Workflow Forms - Approver Role – Accessing the Pending Appointments through the Push Notifications

Approvers are responsible for reviewing and approving, denying, or recycling **WMU Electronic Workflow Forms**. There can be several levels of approval, depending on the type of request and/or form submitted. Approval routing follows an automatic predetermined sequence.

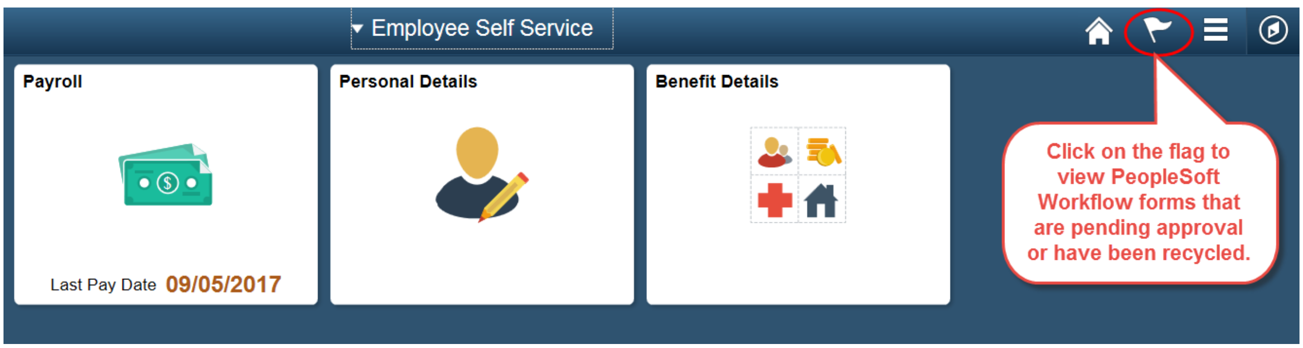
Once the Initiator submits a form, the form is added to the Approver's Push Notification list (**which replaces the former 'Worklist'**). An e-mail is sent to the Approver stating that a form has been added to the Approver's Push Notification List. The e-mail subject line will include the Primary Approver's last name.

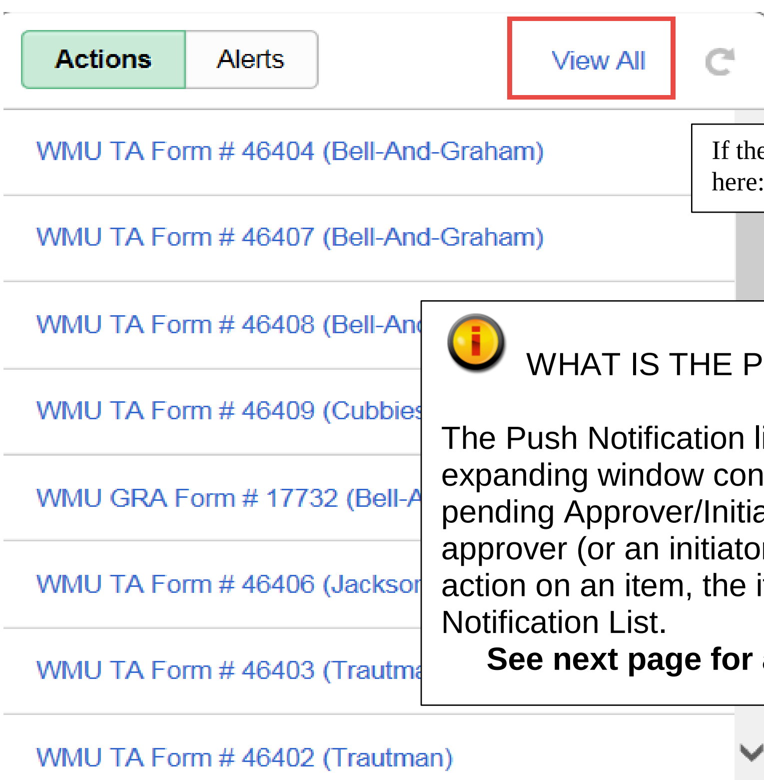
1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

2) Access Push Notificaions

a) 'Click' on the Flag icon at the top right hand side of screen.
b) This opens the Push Notification list. Select the form you want from this view or if you need to expand the list, click 'View All' and then select the form you want.





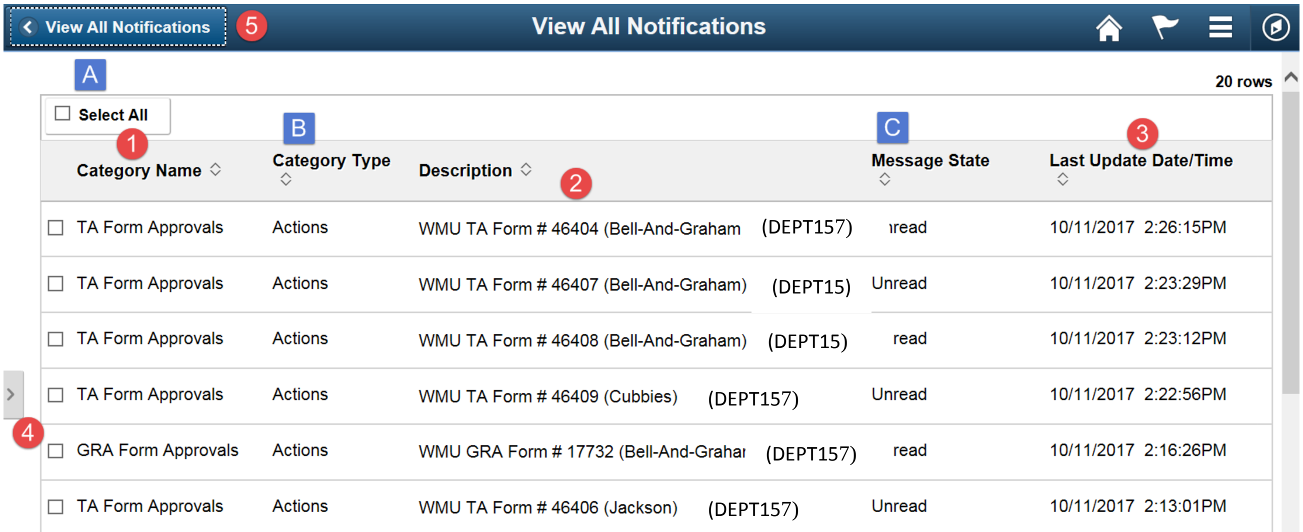
If there are pending forms, they will appear here:

WHAT IS THE PUSH NOTIFICATION LIST?

The Push Notification list replaces the Worklist. It an expanding window containing a list of forms (items) that are pending Approver/Initiator review and action. Once an approver (or an initiator, if the form was recycled) has taken action on an item, the item is removed from the Push Notification List.

See next page for a sample View All Notifications list.

SAMPLE VIEW ALL NOTIFICATIONS LIST:

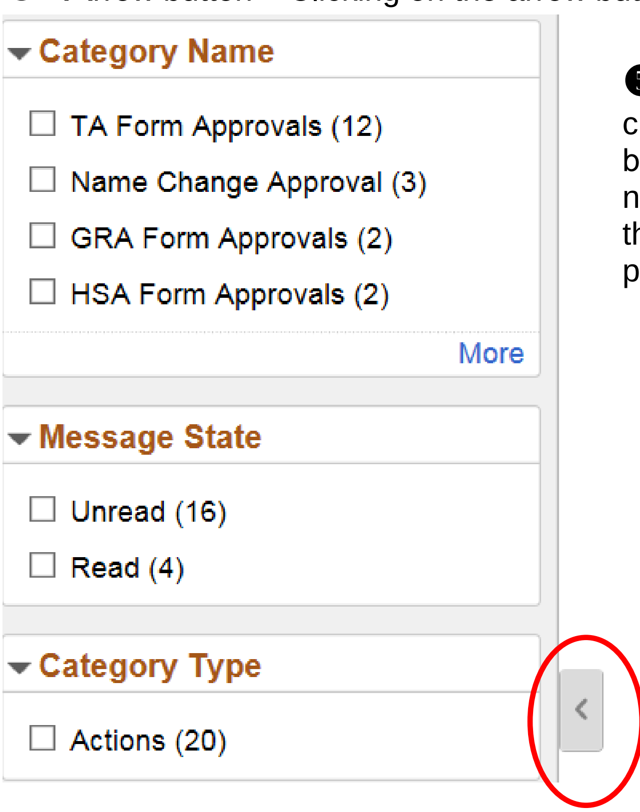


❶ Category Name - lists the type of form pending approval.

❷ Description – lists the form type and number. The name in parenthesis is the primary approver. If you don't't' see your name but the form is listed there you may be the second (or third) level approver or the Initiator if the form was recycled back to you. **The DEPT three digit number corresponds to each department**. For a list of department id numbers, visit this address under the heading PeopleSoft 9.2 New Navigation. There is an excel document with a master list that is sortable: http://wmich.edu/selfservice/hr
To open a form click on any attribute in this list.

❸ Last Update Date/Time - the date the form routed to you from the previous approver/initiator.

❹ Arrow button – Clicking on the arrow button expands for a filter option.



❺ 'View All Notifications' – clicking this button will take you back to the 'View All' list. If you navigate from a different place, this button will state the last place you navigated from.

A and C – Select All – this functionality applies to marking an item read or unread. Click the boxes if you want to mark one item read at a time. This is a personal preference.

B – This functionality is not applicable at this time.

3) Review Form after clicking on the form.

Questions regarding appointments and/or payment(s) should be discussed via an off-line conversation.

NOTE: A wrong combo code (e.g. fund/cost center) cannot be corrected on the form. You can deny the form and have the initiator submit a new form OR the initiator can cancel the original form and submit a new form with the correct combo code.

4) Choose an Approval Action

- **Approve**

If additional approvals are required, the system routes the Incidental Pay Form to the next Approver.

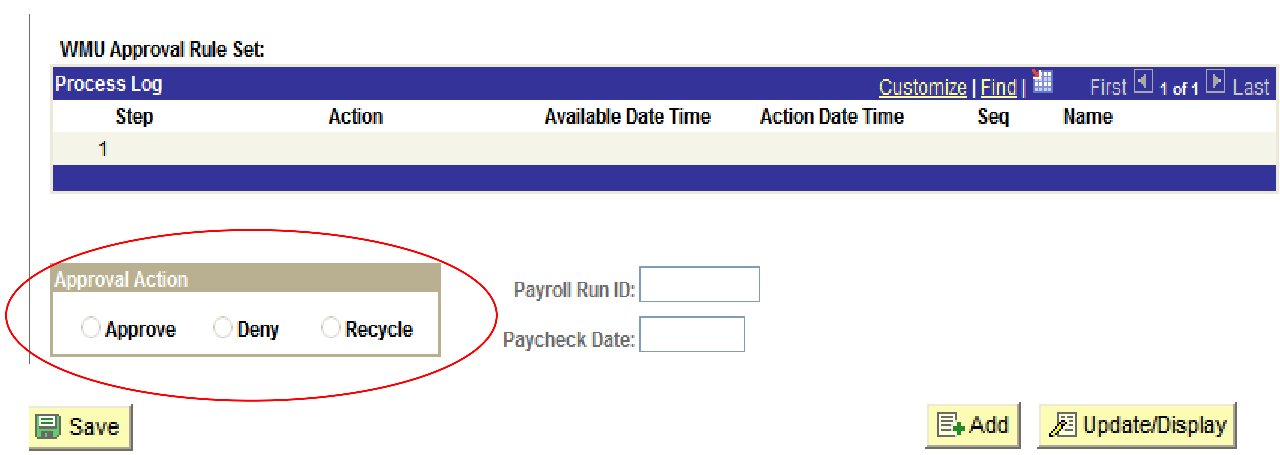
If additional approvals are not required, the WMU Electronic Workflow Form is authorized and sent for entry and/or payment. The Initiator will be notified via e-mail that the ***WMU Electronic Workflow Form*** has been authorized.

- **Deny**

The Initiator and prior Approvers will be notified via e-mail that the form has been denied and will not be processed.

- **Recycle**

The form is returned to the Initiator's Push Notifications for revision and re-submittal. The Initiator and prior Approvers will be notified via e-mail that the form has been recycled.



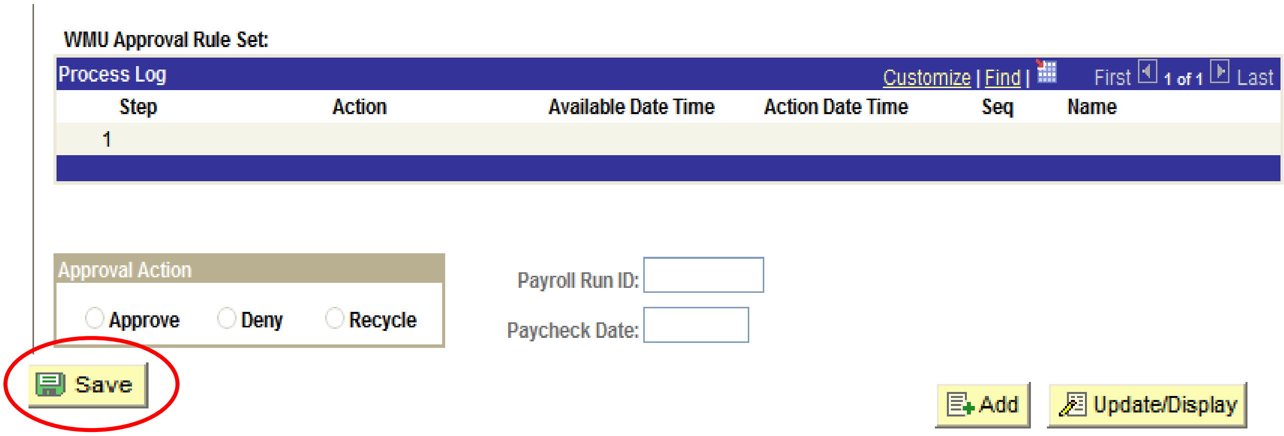
Note: If you need to change an action prior to submitting the form, 'Click' on 'flag' icon to view the Push Notifications and access the form again to reset the form. Any comments added and/or actions taken prior to reset will be erased.

5) Add comments

a) Comments are required if the WMU Electronic Workflow Form is Recycled or Denied.

6) Submit Form

a) Once an action has been selected, 'Click' the 'Save' button at the bottom of the panel.
   i. *The Action (e.g. approved, denied, recycled), Date and Time the action occurred, and Who took action on the form will appear in the "Process Log" box once the form has been saved.*



When the form is successfully saved, you will get a message similar to the following:
'FYI – This form is being routed to the next approver level'.

Note: Once the Approver has submitted the form, the work item will be removed from the Approver's Push Notifications. There may be a slight delay but no more than sixty seconds.

Note: The Initiator has the ability to cancel a form at any time during the approval process. The Approver can only 'Deny' a form to stop it from processing.

ALERT! Push Notifications can be accessed two ways. To see all forms on your list, please click on 'View All'.

Canceling a WMU Electronic Workflow Form – REVISED 1/2010

Occasionally a **WMU Electronic Workflow Form** needs to be canceled**.** The form Initiator can cancel a form, but Approvers cannot. Human Resources and Payroll also have the ability to cancel forms if necessary. How you access the form to be canceled depends on where the form is in the routing process.

Note: Once a form is canceled, it can no longer be processed.

1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

2) WHERE IS MY FORM & How Do I Cancel It?

1) Is the form pending on an Approver's Push Notification List?
   - If YES, see 2A) *Access the WMU Electronic Workflow Form*

2) Is the form on YOUR Push Notification List? (e.g. has been recycled back to you)
   - If YES, see 2B) *Access Push Notification List*

2A) Access the *WMU Electronic Workflow Form*

a) 'Click' on Nav Bar icon at the top right hand side of screen..
b) 'Click' on the Navigator menu item.
c) 'Click' on WMU Workflow Forms.
d) 'Click' on WMU – Appointment or Incidental Pay Form.
e) 'Click' the Find an Existing Value tab.
f) Enter a search value (e.g. the form number, or the employee name or the employee ID etc.) and 'Click' on the appropriate form link to open the form that needs to be canceled.
g) Go to STEP 3

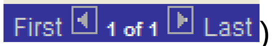
2B) Access Push Notification List: See <u>Processing a WMU Electronic Workflow Form- Accessing Push Notification List</u> for Directions

a) 'Click' on the flag icon at the top right hand side of screen.
b) Select a form on the Push Notifcation List by clicking on a form number. 'Click' View All see see all pending forms.
   i. *The word 'RECYCLED' will be included under work item description.*
c) Go to STEP 3

3) Cancel the *WMU Electronic Workflow Form*

a) 'Click' on the 'Cancel This Appointment' box located at the bottom of the form.

4) Add comments

a) A new comment box will appear for comment entry. To view previous comments, ‘Click’ on View All or use the arrow button in the Comment box header (

).

Note: The Initiator has the ability to cancel a form at any time during the approval process.

- **The WMU Incidental Pay Form cannot be canceled once it has been loaded to the pay sheet. If it is necessary to cancel an Incidental Pay Form after it has been loaded to the pay sheet, contact the Payroll office (387-2935).**

- **The WMU Temporary Faculty/Staff Appointment Form cannot be canceled using the PSHR Electronic Workflow System once it has been authorized. To cancel an appointment or to make changes or corrections once a WMU Temporary Faculty/Staff Appointment Form has been authorized, a paper temporary Transaction form must be processed. To request a temporary transaction form, please send request to HR via hr-hris@wmich.edu. Please include the employee’s name, employee ID and G/L combo code in the e-mail request.**

- **The WMU Student Appointment Form cannot be canceled once it has been authorized. To cancel an appointment or to make changes or corrections once a Student Appointment form has been authorized, a Student Transaction form must be submitted through the Student Employment Online Transactions (SEOT) system.**

- **The WMU Graduate Appointment Form cannot be canceled once it has been authorized. To cancel an appointment or to make changes or corrections once a Graduate Appointment form has been authorized, a Grad Assistantship Transaction form must be submitted through the Student Employment Online Transactions (SEOT) system.**

Re-working a Recycled WMU Electronic Workflow Form

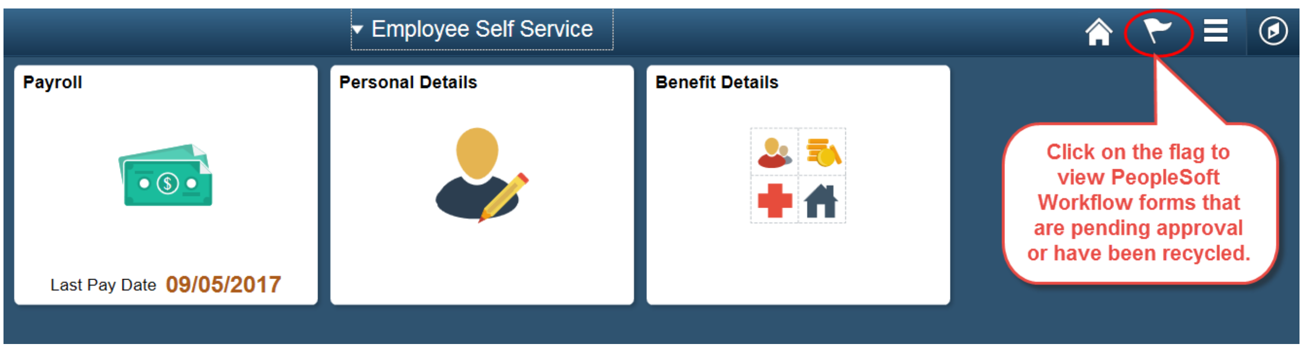
When an Approver Recycles a **<u>WMU Electronic Workflow Form</u>**, the system will route the form back to the Initiator's Push Notification list. The Initiator and prior Approvers will be notified via e-mail that the form has been recycled. The Process Log will indicate who Recycled the form and when.

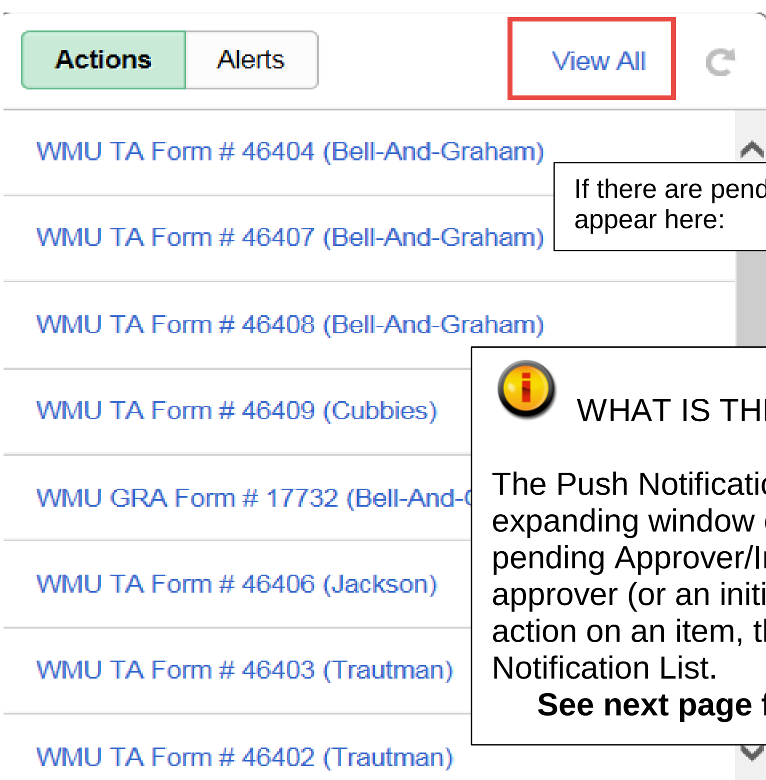
1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

2) Access Push Notification List

a) 'Click' on the Flag icon at the top right hand side of screen.
b) This opens the Push Notification list. Select the form you want from this view or if you need to expand the list, click 'View All' and then select the form you want to review and/or take action on.





If there are pending forms, they will appear here:

WHAT IS THE PUSH NOTIFICATION LIST?

The Push Notification list replaces the Worklist. It an expanding window containing a list of forms (items) that are pending Approver/Initiator review and action. Once an approver (or an initiator, if the form was recycled) has taken action on an item, the item is removed from the Push Notification List.

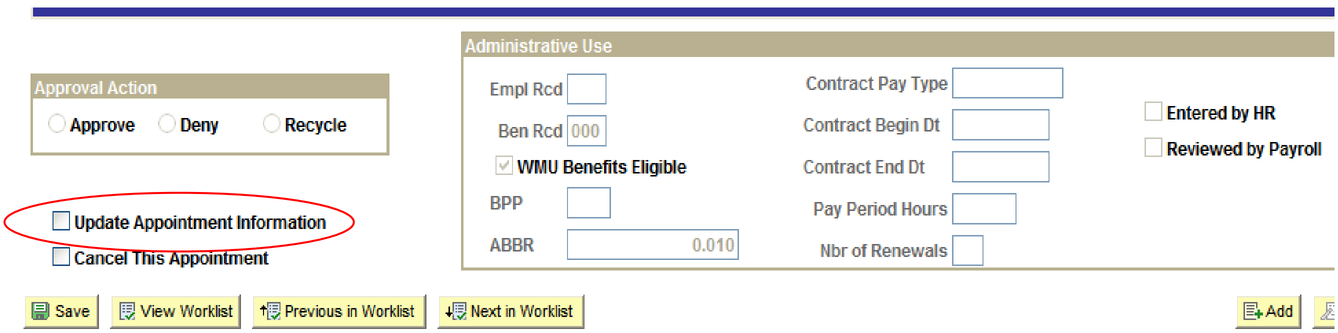
See next page for a sample View All Notifications list.

3) Click on a form number to open the form. Review comments from Approver who recycled the form.

a) To view previous comments, ‘Click’ on View All or use the arrow button.
b) Questions or information regarding comments should be discussed via an off-line conversation with the Approver.

4) Re-work *WMU Electronic Workflow Form*

a) ‘Click’ on Update Payment Information (Incidental Pay) or Update Appointment Information (Temporary Faculty/Staff Appointment Form/Hourly Student Appointment Form/Graduate Appointment) box located at the bottom of the form.

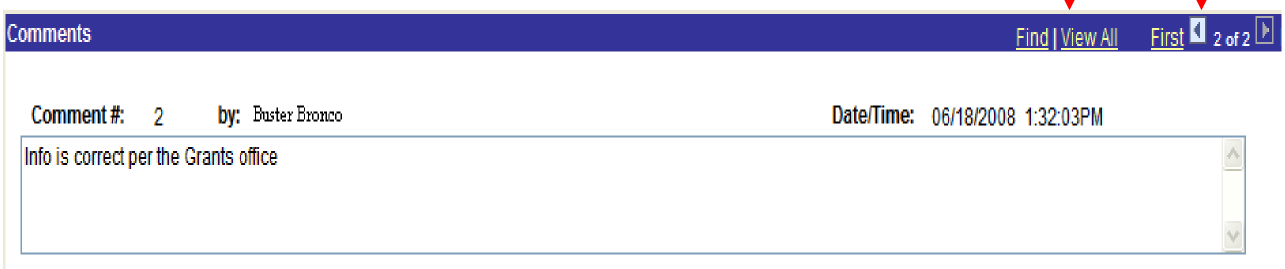


b) Update necessary information. Questions regarding changes should be discussed via an off-line conversation.
   i. *WMU – Incidental Pay Form – the Initiator is able to change the Earnings Code and the Payment amount.*
   ii. *WMU – Temporary Faculty/Staff Appointment Form – the Initiator is able to change any of the data fields except the Charge to G/L Combo Code. If the G/L Combo Code needs to corrected, the form must be canceled and a new form must be processed.*
   iii. *WMU –Hourly Student Appointment Form – the Initiator is able to change any of the data fields except the Charge to G/L Combo Code. If the G/L Combo Code needs to corrected, the form must be canceled and a new form must be processed.*
   iv. *WMU – Graduate Appointment Form – the Initiator is able to change any of the data fields except the Charge to G/L Combo Code. If the G/L Combo Code needs to corrected, the form must be canceled and a new form must be processed. Appointment dates may be changed only within the parameters of the semester/session dates.*
   v. *G/L Combo Code* - Note: If just the fund portion of the G/L Combo Code needs to be corrected (e.g. change from a fund 11 to a fund 25), the form <u>can</u> be revised and re-submitted. Otherwise, if the seven digit number is incorrect, cancel the form and submit a new form with the correct G/L Combo Code.

Note: The Initiator can also choose to cancel the WMU Electronic Workflow Form <u>or</u> not change any data.

5) Add comments

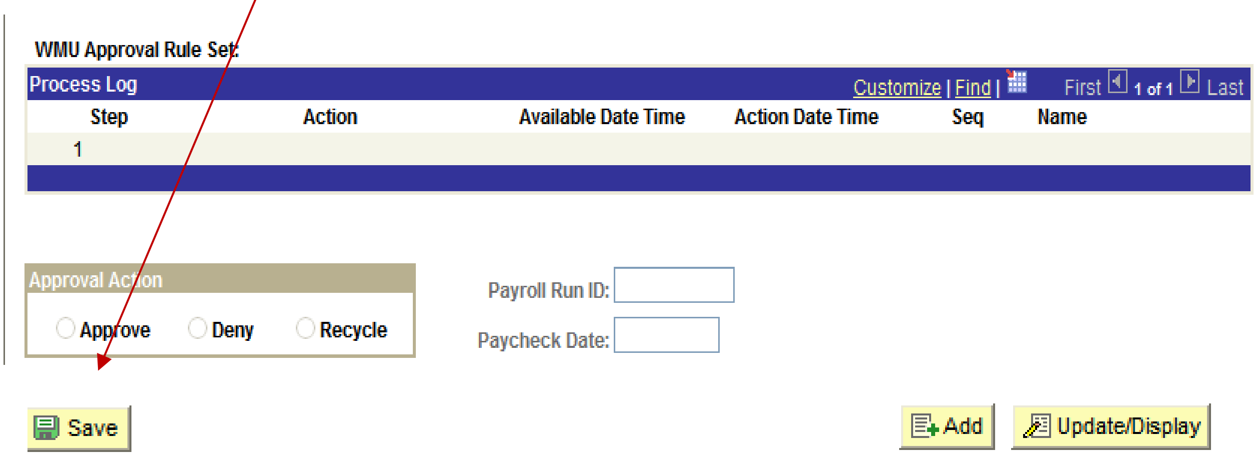
a) The comment box will be cleared for new entry. To view previous comments, 'Click' on View All or use the arrow buttons.



6) Re-submit Form

a) 'Click' the 'Save' button at the bottom of the panel.

   i. *The form will automatically be routed to the appropriate approver(s).* ***Make sure the form routes to the correct approvers.***



7) Go back to your Push Notification List by clicking on View All Notifications at the top left or click on the flag icon or the house icon to return to the home page.

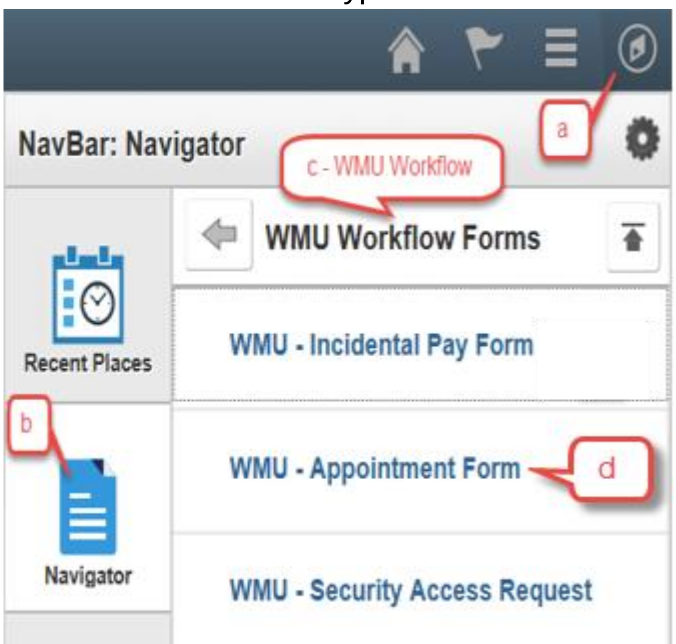
Tracking WMU Electronic Workflow Forms

1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels***.

2) Access Form

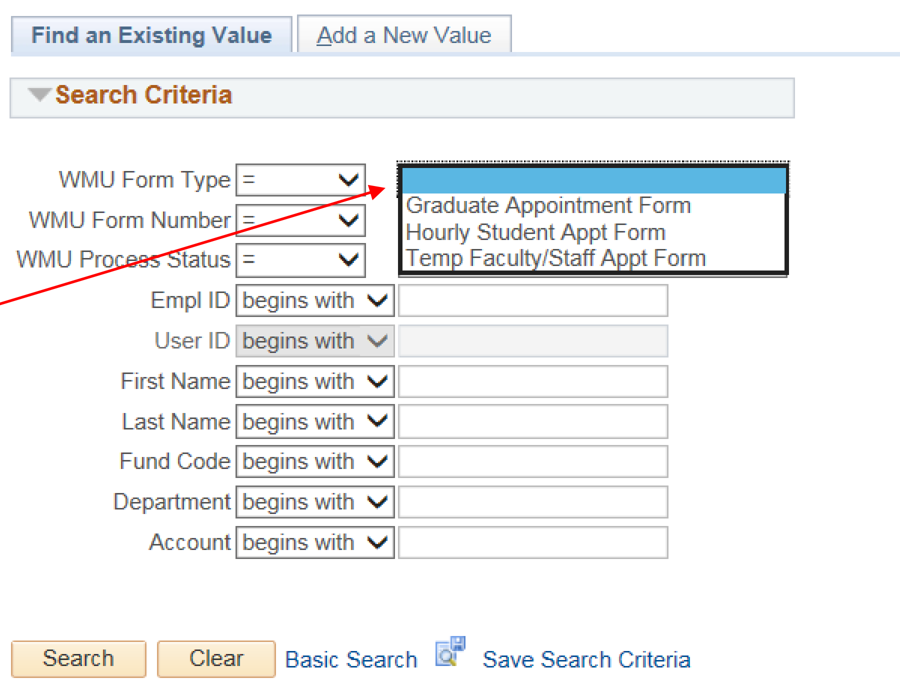
a) ‘Click’ on Nav Bar icon at the top right hand side of screen.
b) ‘Click’ on the Navigator menu item.
c) ‘Click’ on WMU – Workflow, then WMU Workflow Forms.
d) ‘Click’ on desired form type.



e) ‘Click’ on the Find an Existing Value Tab.

f) Select appropriate Workflow form. If selecting an Appointment Form, chose form from the WMU Form Type drop down box.

g) Enter one of the following fields in the search list: WMU Form Number, Process Status, Employee ID, First Name, Last Name, Fund, Department, or Account Code.



Note: Leaving all search fields blank will retrieve <u>all</u> forms that you have access to view. This includes forms that you have taken action on and forms that have been routed to you.

Note: Using an Empl ID doesn't pull up a new hire form because the employee didn't have an ID when the form was originally submitted. Use Name instead to locate the new hire appointment form.

3) Review Status

a) Once you open a form, he process log will indicate the status of the form, to whom the form was last routed and the date that the form appeared on the approvers' Push Notification List. If the form has been authorized, the log will show who authorized the form and when. *When the form has been entered by Human Resources, the action will show as 'Load to DB'.*

SAMPLE WORKFLOW LOG

WMU Approval Rule Set: DIV004 Extended University Programs

Process Log — Customize | Find | First 1-6 of 6

Step	Action	Available Date Time	Action Date Time	Seq	Name
1 Form Initiator	Initiated		05/15/2008 5:47:06PM		Buster Bronco
2 Approver Level 1	Approved	05/15/2008 5:47:07PM	05/29/2008 4:23:10PM	3	Roy Rogers
3 Approver Level 2	Approved	05/29/2008 4:23:10PM	05/29/2008 4:35:15PM	1	Dale Evans
4 Provost Office	Approved	05/29/2008 4:35:15PM	05/30/2008 5:26:06PM	1	The Provost
5 HR Representative	Pending	05/30/2008 5:26:06PM		1	HR Rep 1
6 HR Representative	Pending	05/30/2008 5:26:06PM		2	HR Rep 2

Step: Indicates the step/role in the approval process.

Action: Indicates the status of the form at each step/role in the approval process.

Available Date Time: The date the form was put on the approver's Push Notification List.

Action Date Time: The date the Approver took action.

Name: The name of the person(s) who are authorized to approve the form.

Note: All approvers have an alternate approver. These names will also appear on the list while it is in 'pending' status. Once an approver has taken action, the alternate names will disappear from the process log.

Note: Once a WMU Electronic Workflow Form is routed to a Push Notification List, the person responsible for working the item will have 48 hours to take action. If a Push Notification item that is currently assigned to you has timed out, you will receive an e-mail notification with the subject line of 'Timeout Push Notification'. The e-mail will indicate an instance ID number for reference. The timeout notification does NOT remove the item from your Push Notification List. You must still take action on the item.

Accessing a Timeout Push Notification Item

If action has not been taken on an item in your Push Notification List for 48 hours, you will receive an e-mail from **oit-pshr-info** reminding you a Push Notification item is on your list that needs review. The timeout notification does NOT remove the item from your Push Notification List. **You must still take action on the item.**

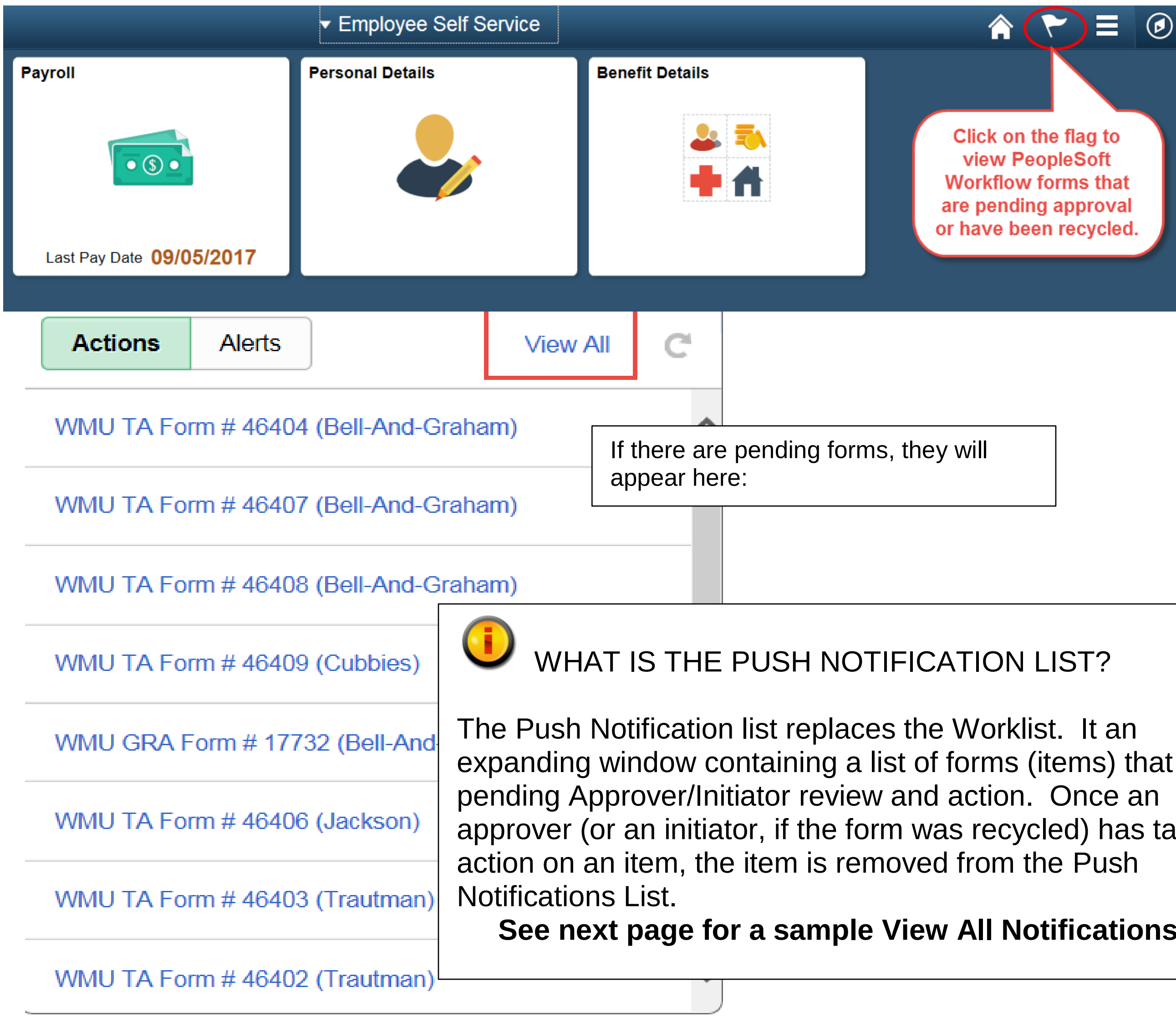
1) Log into PeopleSoft

a) See ***Accessing the WMU Electronic Workflow Form Panels.***

2) Access Push Notification List

'Click' on the Flag icon  at the top right hand side of screen.

a) This opens the Push Notification list. Select the form you want from this view or if you need to expand the list, click 'View All' and then select the form you want.



WHAT IS THE PUSH NOTIFICATION LIST?

The Push Notification list replaces the Worklist. It an expanding window containing a list of forms (items) that are pending Approver/Initiator review and action. Once an approver (or an initiator, if the form was recycled) has taken action on an item, the item is removed from the Push Notifications List.

See next page for a sample View All Notifications list.

3) Approving a workflow form follow step **3-A**. Re-working a recycled form follow step **3-B**.

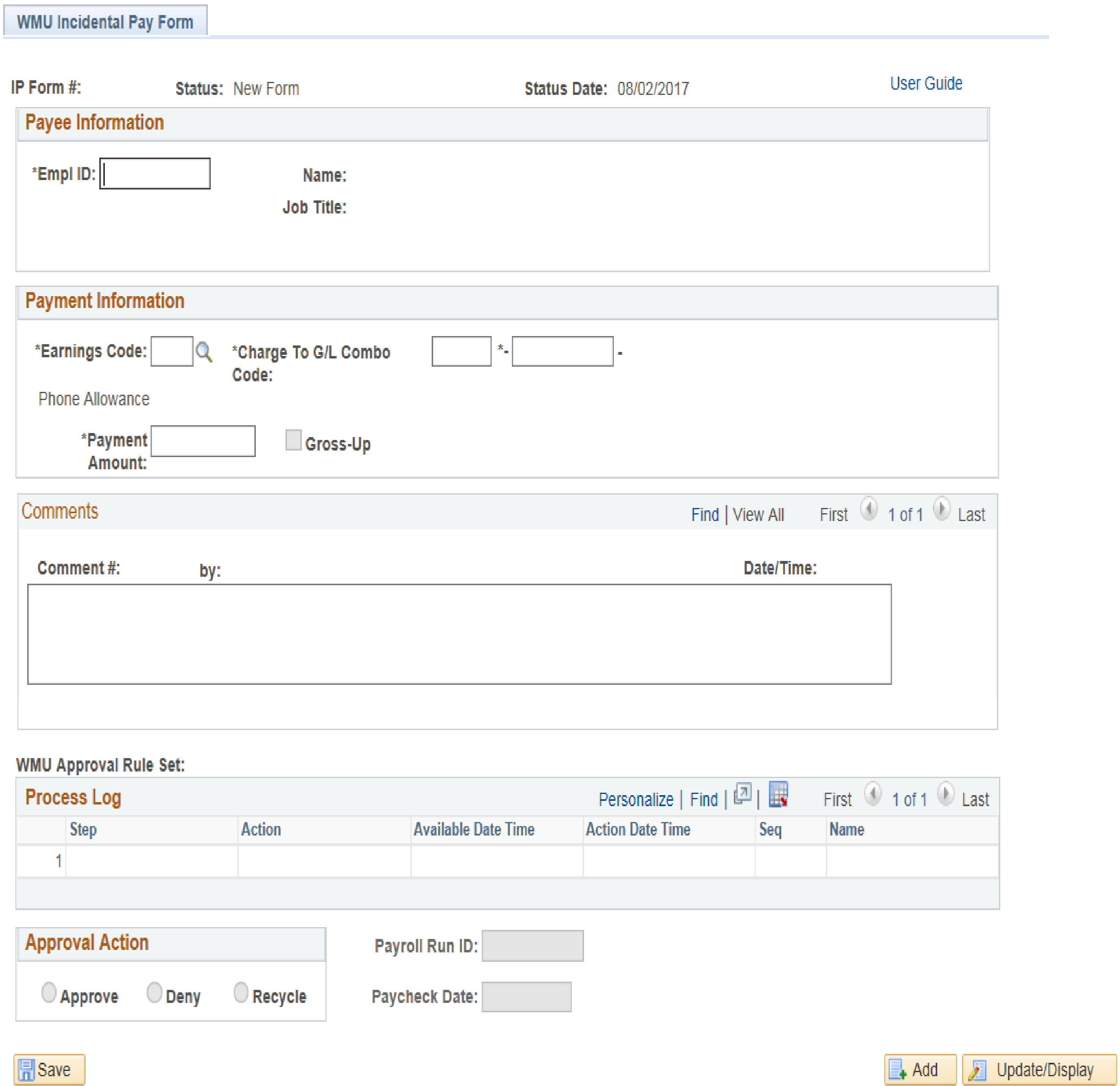
3-A) Follow steps outlined under **Processing a WMU Electronic Workflow Form- Accessing Push Notifications**

3-B) Follow steps outlined under **RE-WORKING A RECYCLED WMU ELECTRONIC WORKFLOW FORM**

Helpful Hints

- When you are reviewing a form, to see all comments in the “Comment” box at once, click ‘View All’.
- When you are ready to work a form on your Push Notification List click ‘View All’ if you have a long list. You may have more than one page of forms to work.
- Some types of appointments (Graduate Appointees) have a long list of appointment/assignment code types. To see all code types, click the ‘View All’ link (found on the left side of the panel under the ‘Search Results’ header.
- Forms remain available for review (through Workflow link) indefinitely.
- When you are entering data on the form, you can access the *User’s Guide* by clicking on the *Guide* link at the top of the form.
- The approval path for a department can be found using PSHR Reports.
- Approval Rule Sets were determined & approved within each VP area.
- Approval Rule Sets can be modified, but a ‘PSHR Electronic Workflow Approval Rule Change Request’ form must be submitted to do so. The form is found on the HR Web site at: http://www.wmich.edu/hr/forms.html
- Once an employee has been given workflow access, s/he does not need to resubmit the request if s/he moves to a new department.
- When you submit an hourly appointment form with an end date that falls within a pay period that has already been processed, you must submit a KRONOS correction sheet to get the person paid.
- Student Appointments will default to FICA exempt, but FICA exemption may change based on automatic biweekly FICA review. To view criteria for FICA exemption visit the Payroll Web site at: http://www.wmich.edu/payroll/payroll/mypay/fica.html

Appendix A – WMU Electronic Workflow Form Screen Shots
Incidental Pay Form


WMU Incidental Pay Form

IP Form #: Status: New Form Status Date: 08/02/2017 User Guide

Payee Information

*Empl ID: Name:

Job Title:

Payment Information

*Earnings Code: *Charge To G/L Combo Code: *- -

Phone Allowance

*Payment Amount: Gross-Up

Comments Find | View All First 1 of 1 Last

Comment #: by: Date/Time:

WMU Approval Rule Set:

Process Log Personalize | Find | | First 1 of 1 Last

	Step	Action	Available Date Time	Action Date Time	Seq	Name
1						

Approval Action

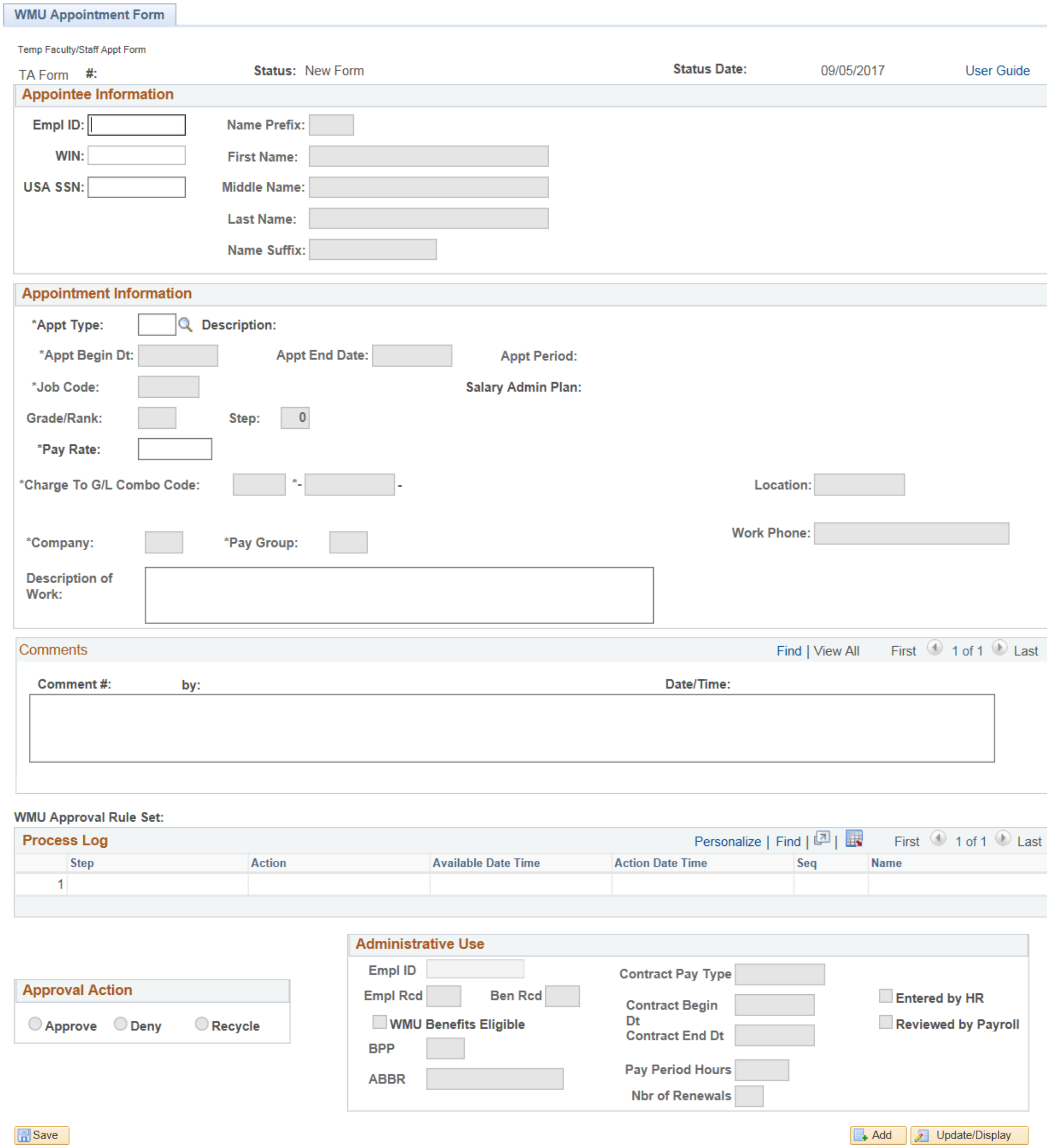
Approve Deny Recycle

Payroll Run ID:

Paycheck Date:

Save Add Update/Display

Appendix A – WMU Electronic Workflow Form Screen Shots
Temporary Faculty/Staff Appointment Form



WMU Appointment Form

Temp Faculty/Staff Appt Form

TA Form #: Status: New Form Status Date: 09/05/2017 User Guide

Appointee Information

Empl ID: Name Prefix:
WIN: First Name:
USA SSN: Middle Name:
Last Name:
Name Suffix:

Appointment Information

*Appt Type: Description:
*Appt Begin Dt: Appt End Date: Appt Period:
*Job Code: Salary Admin Plan:
Grade/Rank: Step: 0
*Pay Rate:
*Charge To G/L Combo Code: *- - Location:
*Company: *Pay Group: Work Phone:
Description of Work:

Comments Find | View All First 1 of 1 Last

Comment #: by: Date/Time:

WMU Approval Rule Set:

Process Log Personalize | Find | | First 1 of 1 Last

	Step	Action	Available Date Time	Action Date Time	Seq	Name
1						

Approval Action

Approve Deny Recycle

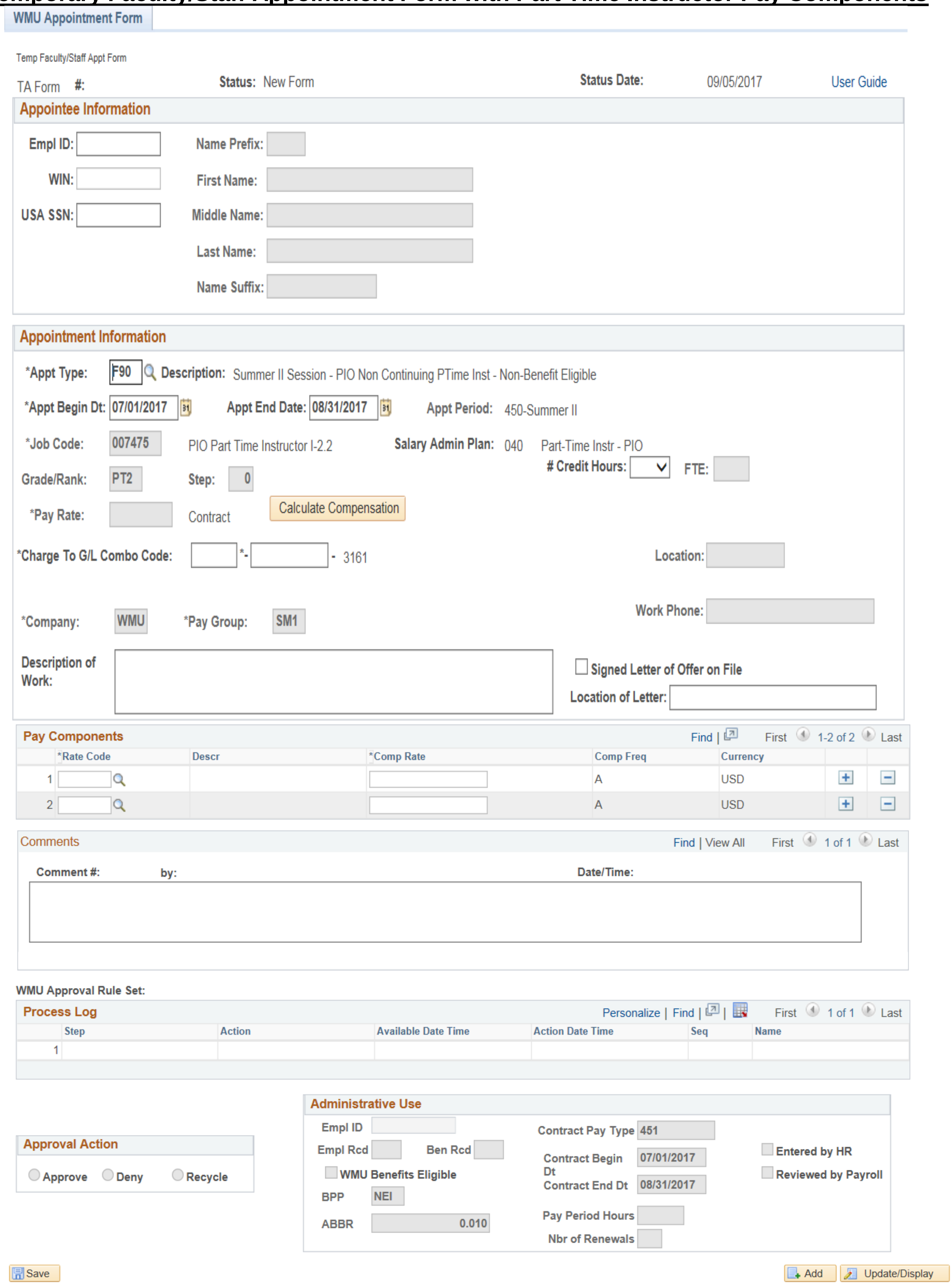
Administrative Use

Empl ID
Empl Rcd Ben Rcd
WMU Benefits Eligible
BPP
ABBR
Contract Pay Type
Contract Begin Dt
Contract End Dt
Pay Period Hours
Nbr of Renewals
Entered by HR
Reviewed by Payroll

Save Add Update/Display

Appendix A – WMU Electronic Workflow Form Screen Shots

Temporary Faculty/Staff Appointment Form with Part Time Instructor Pay Components



WMU Appointment Form

Temp Faculty/Staff Appt Form

TA Form #: Status: New Form Status Date: 09/05/2017 User Guide

Appointee Information

Empl ID: Name Prefix:

WIN: First Name:

USA SSN: Middle Name:

Last Name:

Name Suffix:

Appointment Information

*Appt Type: F90 Description: Summer II Session - PIO Non Continuing PTime Inst - Non-Benefit Eligible

*Appt Begin Dt: 07/01/2017 Appt End Date: 08/31/2017 Appt Period: 450-Summer II

*Job Code: 007475 PIO Part Time Instructor I-2.2 Salary Admin Plan: 040 Part-Time Instr - PIO

Grade/Rank: PT2 Step: 0 # Credit Hours: FTE:

*Pay Rate: Contract Calculate Compensation

*Charge To G/L Combo Code: *- - 3161 Location:

*Company: WMU *Pay Group: SM1 Work Phone:

Description of Work: Signed Letter of Offer on File

Location of Letter:

Pay Components Find | First 1-2 of 2 Last

	*Rate Code	Descr	*Comp Rate	Comp Freq	Currency
1				A	USD
2				A	USD

Comments Find | View All First 1 of 1 Last

Comment #: by: Date/Time:

WMU Approval Rule Set:

Process Log Personalize | Find | First 1 of 1 Last

	Step	Action	Available Date Time	Action Date Time	Seq	Name
1						

Approval Action

Approve Deny Recycle

Administrative Use

Empl ID

Empl Rcd Ben Rcd

WMU Benefits Eligible

BPP NEI

ABBR 0.010

Contract Pay Type 451

Contract Begin Dt 07/01/2017

Contract End Dt 08/31/2017

Pay Period Hours

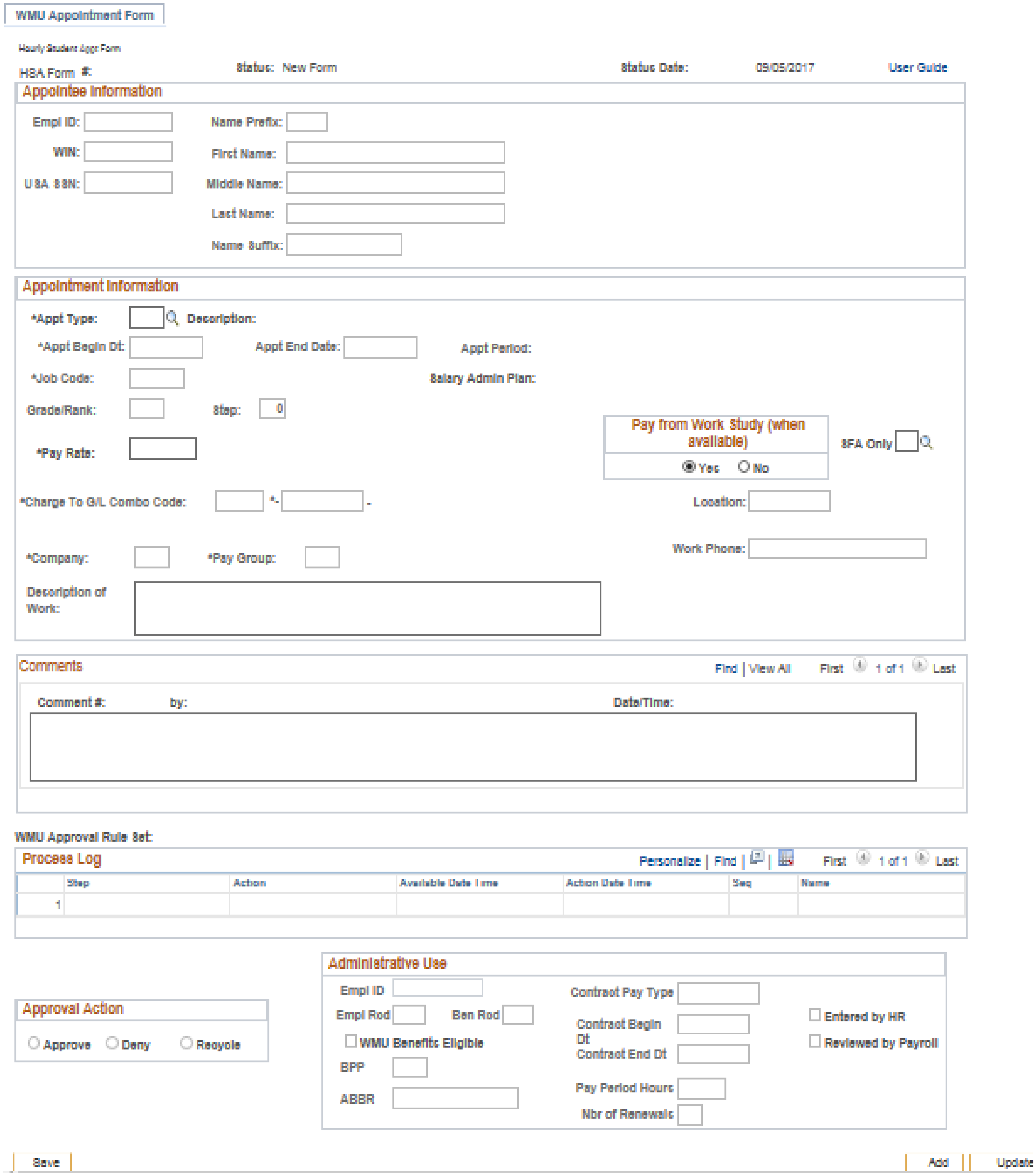
Nbr of Renewals

Entered by HR

Reviewed by Payroll

Save Add Update/Display

Appendix A – WMU Electronic Workflow Form Screen Shots
Hourly Student Appointment Form



WMU Appointment Form

Hourly Student Appt Form

HSA Form #: Status: New Form Status Date: 09/05/2017 User Guide

Appointee Information

Empl ID: Name Prefix:

WIN: First Name:

USA SSN: Middle Name:

Last Name:

Name Suffix:

Appointment Information

*Appt Type: Description:

*Appt Begin Dt: Appt End Date: Appt Period:

*Job Code: Salary Admin Plan:

Grade/Rank: Step: 0

Pay from Work Study (when available)

Yes No

SFA Only

*Pay Rate:

*Charge To G/L Combo Code: *- -

Location:

Work Phone:

*Company: *Pay Group:

Description of Work:

Comments

Find | View All First 1 of 1 Last

Comment #: by: Date/Time:

WMU Approval Rule Set:

Process Log

Personalize | Find | First 1 of 1 Last

	Step	Action	Available Date Time	Action Date Time	Seq	Name
1						

Approval Action

Approve Deny Recycle

Administrative Use

Empl ID

Empl Rcd Ben Rcd

WMU Benefits Eligible

BPP

ABBR

Contract Pay Type

Contract Begin Dt

Contract End Dt

Pay Period Hours

Nbr of Renewals

Entered by HR

Reviewed by Payroll

Save Add Update

Appendix A – WMU Electronic Workflow Form Screen Shots
Graduate Appointment Form

WMU Appointment Form

Graduate Appointment Form

GRA Form #: **Status:** New Form **Status Date:** 09/28/2017 User Guide

Appointee Information

Empl ID:

WIN:

USA SSN:

Name Prefix:

First Name:

Middle Name:

Last Name:

Name Suffix:

Appointment Information

*Appt Type: 141 **Description:** Summer I Resch-Application GA Full Appt

*Appt Begin Dt: 04/24/2017 Appt End Date: 06/18/2017 Appt Period: 400-Summer I

*Job Code: GRAGA GA/DA-Grad Assistantship

Grade/Rank: FUL Step: 0

*Pay Rate: 3034.00 Contract

0.13

NEW Requirement- starting Summer II 2014, add acronym to Location of Letter box. See pg. 19

*Charge To G/L Combo Code: 11 *- 11111111 - 3192

Location:

Work Phone:

*Company: WMU *Pay Group: STU

Description of Work: Note job duties here

☑ Signed Letter of Offer on File

Location of Letter: (D)HR/GC

Comments

Find | View All First 1 of 1 Last

Comment #: by: Date/Time:

WMU Approval Rule Set:

Process Log

Personalize | Find | First 1 of 1 Last

Step	Action	Available Date Time	Action Date Time	Seq	Name
1					

Approval Action

Approve Deny Recycle

Administrative Use

Empl ID

Empl Rcd Ben Rcd

WMU Benefits Eligible

BPP GA

ABBR

Contract Pay Type 402

Contract Begin Dt 04/24/2017

Contract End Dt 06/18/2017

Pay Period Hours 40.00

Nbr of Renewals

Entered by HR

Reviewed by Payroll

Save Add Update/Display

Appendix B– Glossary of Terms

Appointment Begin Date	The effective date the appointment starts.
Account	The four digit code formally known as ‘object code’. The code describes the type of payment being made in relation to the fringes (e.g. 3216, 3218, 3154, etc).
Appointment End Date	The effective date that the appointment is scheduled to end.
Appointment Period	Timeframe during which the person is employed.
Approved	The form has been okayed by an Approver and forwarded to the next Approval level for review.
Approver(s)	Responsible for reviewing and approving, denying, or recycling WMU Electronic Workflow Forms.
Authorized	The final approval has been made and the form is ready for entry/payment.
Contract Pay	Pay Type for salaried appointments less than one year in duration.
Earnings Code	Code/Description used on Incidental Pay form for non-hours related payments.
EmplID	A unique ID number assigned to employees upon initial hire onto the database.
Form Number	Unique number assigned by the system for each initiated request.
FTE	Stands for Full Time Equivalency – a full-time fiscal year employee has an FTE of 1.00; less than full-time fiscal year employees have a ‘pro-rated’ FTE.
G/L Combo Code	The Fund + Department + Account that is being charged. • Fund = 2 digit code (e.g. 11, 43, 26) • Department = 7 digit cost center • Account = 4 digit object code (e.g. 3211, 3631)
I-9 Date	Date the I-9 form (Employment Eligibility Verification) was completed & verified.

Appendix B Continued – Glossary of Terms

Initiator	The person who submits the WMU Electronic Workflow Form.
Mail Stop	A four digit code assigned departments by Freight/Postal/Delivery for mail and other delivery purposes.
Postal	The Zip Code (or other non-US postal code).
Process Status	Indicates where the request is in the process. See Appendix F for status definitions.
Push Notification List	List of forms pending approver review and action. Once an approver (or an initiator, if the form was recycled) has taken action on an item, the item is removed from this list.
Step	Used with Student Grade level to allow for experience and length of service.
Stipend/Salary	The semester/session salary pay rate for a Graduate appointment.
WIN	Western Identification Number – a unique identifier number derived by the Banner system. All WMU employees and students have a WIN.
Work Study	For use with Hourly Student Appointment forms. The department may opt to use Work Study money to pay a student. By checking the 'Yes' button, work study will kick in if/when Work Study money is available.

Part Time Instructors (PIO & Non PIO) Payment Types

PIO Pay Component Type	Description
BASE	Base Pay - The base salary per credit hour pay. E.g. if the instructor is teaching 4 credit hours (at $750 per credit hour), the base is $3000.
OTHER	Other Pay – To be used as need for other types of pay (such as class size, etc.) that are not part of the base pay.

Appendix B– Glossary of Abbreviations (Graduate Appointments)

Appointment Type	
GA	Graduate Assistantship
DAC	Doctoral Associateship with candidacy
DGA	Doctoral Graduate Assistantship
DA	Doctoral Associateship prior to candidacy **(Phasing out – only used for existing DA's.)**
AGEPDG	AGEP Doctoral Graduate Assistantship
AGEPDA	AGEP Doctoral Associateship prior to candidacy (**Phasing out – only used for existing DA's.)**
AGEPDC	AGEP Doctoral Associateship with candidacy
TM	Thurgood Marshall Assistantship
TMDG	Thurgood Marshall Doctoral Graduate Assistantship
TMDA	Thurgood Marshall Doctoral Associateship prior to candidacy **(Phasing out – only used for existing DA's)**
TMDC	Thurgood Marshal Doctoral with candidacy
Salary Admin Plan	
GAT	Teaching
GAN	Non-Teaching (No Longer used effective with Spring 2012)
GAR	Research (No Longer used effective with Spring 2012)
GAD	Research – Discovery (for appointments in grants funds 25 through 30 **(New SAP effective with Spring 2012)**
GAA	Research – Application **(New SAP effective with Spring 2012)**
Grade (Funding Level)	
FUL	Full time Appointment
3/4	Three quarter time (¾) Appointment **(No longer offered as of Fall 2017)**
2/3	Two third time (2/3) Appointment **(No longer offered as of Fall 2018)**
1/2	Half time (½) Appointment

Appendix C – Appointment Type Definitions

Appointment type is the description of the appointment the employee will be holding. The appointment type is based on the TYPE OF WORK the employee is doing and NOT the type of appointment the employee currently holds.

Faculty Appointments

Title	Grade	Assignment Type	Description
Additional Faculty Appointment **(Instructional)**	n/a	**Regular Faculty Appt Types** F30 – Fall Semester F31 – Spring Semester F32 – Summer I Session F33 – Summer II Session F34 – Summer 15 Weeks **Faculty Specialist Appt Types** I01 – Fall Semester I04 – Spring Semester I07 – Summer I Session I12 – Summer II Session	Contractual teaching load during the "off semester or session" – up to 6 hours for bargaining unit faculty who are not faculty specialists and up to 6 hours for faculty specialists.
Additional Faculty Appointment **(Non-Instructional)**	n/a	**Regular Faculty Appt Types** F51 – Variable F52 – Fall Semester F53 – Spring Semester F54 – Summer I Session F55 – Summer II Session F56 – Summer 15 Weeks **Faculty Specialist Appt Types** I15 – Variable I03 – Fall Semester I06 – Spring Semester I09 – Summer I Session I14 – Summer II Session	Faculty who are performing non-instructional duties, such as summer advising, grant research, administrative duties, etc.
Faculty Overload Appointment	n/a	**Regular Faculty Appt Types** F40 – Fall Semester F41 – Spring Semester F42 – Summer I Session F43 – Summer II Session F44 – Summer 15 Weeks **Faculty Specialist Appt Types** I02 – Fall Semester I05 – Spring Semester I08 – Summer I Session I13 – Summer II Session	Teaching load beyond the contractual maximum full-time workload in any given semester or session. Paid at overload rates.
Faculty Hourly Appointment (**Non-Instructional**)		FH1- Hourly Faculty	Faculty who are performing non-instructional duties, such as summer advising, grant research, administrative duties, etc. and there is a need to pay the faculty member an hourly rate.

Title	Grade	Assignment Type	Description
Individualized Assignment Faculty Appointment	n/a	F65 - Variable – Faculty member is benefits eligible F66 -– Variable – Faculty member is non-benefits eligible	When a faculty member oversees EUP's Open Learning classes or faculty member is paid by 'piecework' (e.g. for number of students counseled, or for number of assignments turned in).
Part-time Instructor -Non-PIO Non-Benefits Eligible	PT1	F20 – Fall Semester F21 – Spring Semester F22 – Summer I Session F23 – Summer II Session F24 – Summer 15 Weeks F25 – ATYP variable	Appointed on a semester by semester basis; not board approved. Not a part of the PIO bargaining unit. * EMPLOYEE is not benefit eligible.
Part-time Instructor Non-PIO Benefits Eligible	PT1	F15 – Fall Semester F39 – Spring Semester F49 – Summer I Session F99 – Summer II Session F – Summer 15 Weeks F – ATYP variable	Appointed on a semester by semester basis; not board approved. Not a part of the PIO bargaining unit. * EMPLOYEE holds a Benefit Eligible position at WMU in addition to this appointment.
Part-time Instructor Hourly - Non-PIO Benefits Eligible-Hourly	PT1	FH2- Fiscal Year – Use for any semester. Initiator populates dates of work.	When a benefits-eligible hourly employee holds a part-time instructor appointment.
Part-time Instructor I-2 (PIO) - Non-Benefits Eligible Formerly Non-Continuing	PT2	F91 – Fall Semester F92 – Spring Semester F93 – Summer I Session F90 – Summer II Session F94 – Summer 15 Weeks	Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. * EMPLOYEE is not benefits eligible.
Part-time Instructor I-2 (PIO) - Benefits Eligible Formerly Non-Continuing	PT2	F16– Fall Semester F38 – Spring Semester F48 – Summer I Session F98 – Summer II Session F – Summer 15 Weeks	Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. * EMPLOYEE holds a benefits eligible position at WMU in addition to this appointment.
Part-time Instructor I-3 (PIO) Non- Benefits Eligible Formerly Continuing	PT3	F86 – Fall Semester F87 – Spring Semester F88 – Summer I Session F85 – Summer II Session F89 – Summer 15 Weeks	Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. * EMPLOYEE is not benefits eligible.
Part-time Instructor I-3 (PIO) - Benefits Eligible Formerly Continuing	PT3	F17– Fall Semester F37 – Spring Semester F47 – Summer I Session F97 – Summer II Session F99 – Summer 15 Weeks	Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. * EMPLOYEE holds a Benefit Eligible position at WMU in addition to this appointment.
Replacement-Short Term Instructor	PT1	F60 – Variable – Faculty member is benefits eligible F61 - Variable – Faculty member is non-benefits eligible	When an AAUP or non-benefits eligible faculty member fills in for another faculty member on a short-term duration (e.g. If more than two weeks hire with credit hours for shorter period of time).

Title	Grade	Assignment Type	Description
Replacement Instructor – Hourly, Non Benefits Eligible	PT1	FH3 – Fiscal Year – faculty member is non benefits-eligible	When an AAUP or non-benefits eligible faculty member fills in for another faculty member on a short-term duration and the department needs to pay the employee hourly.
Visiting Professor	I60	F10 – Fall Semester F11 – Spring Semester F12 – Summer I Session F13 – Summer II Session F14 – Summer 15 Weeks	Approved by the Board of Trustees; appointment is made for a specified term at WMU while on leave from another institution.
Visiting Professor – Part-time Instructor (Teaching)	PT6	F26 – Fall Semster F27 – Spring Semester F28 – Summer I Session F29 – Summer II Session	Approved by the Board of Trustees: appointment is to be used when a visiting professor is teaching.

Appendix C Continued - Hourly Appointments

Title	Grade	Assignment Type	Description
Temporary Non-Exempt – Additional Appointment *****	N99	H00	Use for current WMU benefits-eligible employees who are performing additional non-exempt work (outside of normal workload) *****
Temporary Non-Exempt *****	N99	H01	Use for non-benefit eligible employees performing non-exempt work. *****
Temporary Non-Exempt	N99	H02	Used **only** for persons employed at Miller Auditorium as stagehands.
Faculty Hourly Appointment (**Non-Instructional**)	Grade on primary job defaults	FH1- Hourly Faculty	Faculty who are performing non-instructional duties, such as summer advising, grant research, administrative duties, etc. and there is a need to pay the faculty member an hourly rate. (also noted in faculty section above.)
Part-time Instructor Hourly - Non-PIO Benefits Eligible-Hourly	PT1	FH2- Fiscal Year – Use for any semester. Initiator populates dates of work.	When a benefits-eligible hourly employee holds a part-time instructor appointment.
Replacement Instructor – Hourly, Non Benefits Eligible	PT1	FH3 - Use for any semester. Initiator populates dates of work.	When an AAUP or non-benefits eligible faculty member fills in for another faculty member on a short-term duration and the department needs to pay the employee hourly.

***All non-faculty temporary appointments will be submitted as hourly as of October 28, 2013. This applies to:**

- Temporary employees who hold only a temporary position.

- Benefits eligible staff employees who hold a temporary position in addition to their regular assignment. For these employees, their regular benefits-eligible position may be either salaried or hourly, but in all cases their temporary position will be paid on an hourly basis.

- The following temporary appointments are **excluded** from the hourly appointment requirement, in accordance with collective bargaining agreements:
  - Additional and overload appointments for AAUP faculty.
  - PIO faculty appointments unless the Primary benefits-eligible job is hourly (see FLSA guidelines for part-time teaching appointments - wmich.edu/provost/policies)
  - Graduate assistantship appointments
  - Additional appointments for senior administrative officers holding faculty rank

NOTE: For additional information see PPM Section 3 – Employment Practices: Other Appointments: http://www.wmich.edu/hr/manual-employment-other

Appendix C Continued - Hourly STUDENT Appointments

Title	Grade	Assignment Type	Description
Hourly Student Appointment	A1 – A4 B1 – B4 C1 – C4 D1 – D4 Q	001	Use for WMU students. The Student Hourly Appointment Form can be submitted even if the student is non-enrolled during summer sessions or for one semester.

Appendix C - Salaried Appointments

Title	Grade	Assignment Type	Description
Temporary Exempt	E99	S04	**This appointment type is no longer used. See page above for the policy change.**
Salaried Administrative Officer with faculty rank (formerly Temp Exempt – Additional Appointment)	E99	S02	Use for current Administrative Officers who are performing additional exempt work (outside of normal workload) per FLSA guidelines. (Examples- chair or dean) NOTE: Do NOT use for faculty non-instructional appointments or Administrative Officers without faculty rank.

Appendix C Continued – Graduate Appointments (effective: 4/2017)

Title	Grade	Assignment Type	Teaching	Research-Application	Research-Discovery	Description
Graduate Assistantship (GA)	FUL	Academic Yr	G01	G22	G43	These appointments are awarded to master's students and are paid at the Graduate Assistant rate.
		FALL	001	021	041	
		Spring	061	081	101	
		Summer I	121	141	161	
		Summer II	181	201	221	
Graduate Assistantship (GA)	3/4	¾ Appointments are no longer available starting Fall 2017				
		Summer I	122	142	162	
		Summer II	182	202	222	
Graduate Assistantship (GA)	2/3	Academic	G03	G24	G45	
		FALL	003	023	043	
		Spring	063	083	103	
		Summer I	123	143	163	
		Summer II	183	203	223	
Graduate Assistantship (GA)	1/2	Academic Yr	G04	G25	G46	
		FALL	004	024	044	
		Spring	064	084	104	
		Summer I	124	144	164	
		Summer II	184	204	224	
Doctoral Graduate Assistantship (DGA)	FUL	Academic Yr	G05	G26	G47	These appointments are awarded to doctoral students and are paid at the Graduate Assistant rate.
		FALL	005	025	045	
		Spring	065	085	105	
		Summer I	125	145	165	
		Summer II	185	205	225	
Doctoral Graduate Assistantship (DGA)	3/4	¾ Appointments are no longer available starting Fall 2017				
		Summer I	126	146	166	
		Summer II	186	206	226	
Doctoral Graduate Assistantship (DGA)	2/3	Academic Yr	G07	G28	G49	
		FALL	007	027	047	
		Spring	067	087	107	
		Summer I	127	147	167	
		Summer II	187	207	227	
Doctoral Graduate Assistantship (DGA)	1/2	Academic Yr	G08	G29	G50	
		FALL	008	028	048	
		Spring	068	088	108	
		Summer I	128	148	168	
		Summer II	188	208	228	

Title	Grade	Assignment Type	Teaching	Research-Application	Research-Discover	
Doctoral Associateship (DA) – **prior to Candidacy**	FUL	Academic Yr	G09	G30	G51	These appointments are awarded to select doctoral students and are paid at the Doctoral Associate rate prior to Candidacy.
		FALL	009	029	049	
		Spring	069	089	109	
		Summer I	129	149	169	
		Summer II	189	209	229	
Doctoral Associateship (DA) – **prior to Candidacy**	3/4	¾ Appointments are no longer available starting Fall 2017				
		Summer I	130	150	170	
		Summer II	190	210	230	
Doctoral Associateship (DA) – **prior to Candidacy**	2/3	Academic Yr	G11	G32	G53	
		FALL	011	031	051	
		Spring	071	091	111	
		Summer I	131	151	171	
		Summer II	191	211	231	
Doctoral Associateship (DA) – **prior to Candidacy**	1/2	Academic Yr	G12	G33	G54	
		FALL	012	032	052	
		Spring	072	092	112	
		Summer I	132	152	172	
		Summer II	192	212	232	
Doctoral Associateship (DAC) – **with Candidacy**	Full	Academic Yr	G13	G34	G55	These appointments are awarded to select doctoral students and are paid at the Doctoral Associate rate with Candidacy.
		FALL	350	357	364	
		Spring	371	378	385	
		Summer I	389	396	403	
		Summer II	407	414	421	
Doctoral Associateship (DAC) – **with Candidacy**	3/4	¾ Appointments are no longer available starting Fall 2017				
		Summer I	390	397	404	
		Summer II	408	415	422	
Doctoral Associateship (DAC) – **with Candidacy**	2/3	Academic Yr	G15	G36	G57	
		FALL	352	359	366	
		Spring	373	380	387	
		Summer I	391	398	405	
		Summer II	409	416	423	
Doctoral Associateship (DAC) – **with Candidacy**	1/2	Academic Yr	G16	G37	G58	
		FALL	353	360	367	
		Spring	374	381	388	
		Summer I	392	399	406	
		Summer II	410	417	424	
Thurgood Marshall Assistantship (TM) Thurgood Marshall Doctoral Associateship (TMD)		The Thurgood Marshall Fellowship is a highly competitive award. Only a limited number of Thurgood Marshall Fellowships are available. See the Graduate College Web site for more information.				

Appendix D – Contact Information

If you have questions or problems related to processing a PSHR Electronic Workflow form, please contact the Office of Information Technology Help Desk Monday through Friday, 8:00 a.m. – 5:00 p.m.

In order for the Help Desk to assist you, you will need to provide the following information:

- Name
- Operator ID (Bronco NetID)
- WIN Number
- Last four digits of Social Security Number

Contact the Help Desk

Phone: (269) 387-HELP (387-4357)
E-mail: helpdesk@wmich.edu

Appendix E – Troubleshooting Error Messages

For contact information or further assistance please refer to Appendix D.

Error Message	Comments
ERROR - cannot Save. No active default Approval Rule Set (having at least one Approver at Level One) found for charge-to-cost-center. Must provide HRMS Workflow Administrator with Approval Rule Set data. (7433100). (30000,2)	Approval rule set data is missing.
You are not authorized to access this component. (40,20) You have not been granted security authorization for the component you are attempting to access. You may have access to the designated component and page, but not in the specified action mode (such as Correction or Update/Display). Contact your system administrator.	This error message was received while trying to access reports. This message indicates that you do not have access to reporting in PSHR.
ERROR - Page not found	Message received when trying to bring up PeopleSoft web page. Message may be received when there is an invalid network connection. The web server could be experiencing difficulties, so the user should try to log in again before calling the help desk. If the user is attempting to access the system wirelessly, an error message will be received.
ERROR - cannot Submit Form. Someone else has just performed a simultaneous action on this form. (3000,3)	Another user has already worked the form. Contact HR to confirm status of form. You will need to see if your form saved by using the 'find an existing value tab'. If you don't see your form then you will need to submit a new form if the data/form did not save.
SAVING ISSUE – The appointment form is not saving and cursor is spinning.	**Using Firefox** as your browser can cause some issues, including spinning in a loop or approvers not being able to approver your form. Please note that the browsers endorsed by the PeopleSoft system are Internet Explorer and Safari. Use either of these browsers for approving PeopleSoft appointment forms.

Appendix E Continued – Troubleshooting Error Messages

For contact information or further assistance please refer to Appendix D.

Site name is not valid. Check your url syntax and try again.	The user is not entering the correct URL address.
Data being added conflicts with existing data. If the problem persists...	When adding an item to the database, the system found a conflicting item already exists. This problem can happen if another user has entered similar information at the same time as you. Note the changes you have made, cancel the page, then retry your changes.
Appointment form is not saving and cursor is spinning.	Please note that the browsers endorsed by the PeopleSoft system are Internet Explorer and Safari. Using Firefox as your browser can cause some issues, including spinning in a loop or approvers not being able to approver your form.

Appendix F – Process Status Definitions

The following statuses can be seen at the top of the form (to the right of the form number), under the Find an Existing Value tab search field, or in the Process Log.

Process Status	Definition
Authorized	All approvers have okayed and signed off on the form; the form has been approved for payment and is ready for entry to the PeopleSoft database.
Canceled	The initiator has stopped the form; the form can no longer be processed and will not be paid.
Denied	An approver has stopped the form; the form can no longer be processed and will not be paid.
Loaded to DB (Loaded to Database)	HR has entered the appointment to the PeopleSoft database and is now ready for Payroll to update the pay sheet.
Loaded to Pay Sheet	Payroll has added the payment to the payroll pay sheets.
New Form	A form has been initiated.
Paid	A paycheck has been issued to the employee.
Recycled	A form has been sent back to the initiator for revision. The form will appear on the initiator's Push Notifications List.
Routed (Routed for Approval)	The form is moving through the approvals signature path.
Skipped	A Primary approver, who has multiple approver levels, has already approved the form.

Appendix G – Incidental Pay Code Definitions

The following Incidental Pay (IP) types are available for processing.

IP Type * Earnings codes automatically grossed up ** Earnings Codes grossed up by request	**IP Code**	**IP Description**
Academic Award **	AAD	Faculty awards determined by College or Department – not a University wide award. ** Check gross up only if paid by an Endowment.
Automobile Lease Payments	AUC	Used when a University car is provided to an employee as part of job.
Clothing Allowance	CLO	Used when a uniform is required to be worn by employee.
Faculty Award * - Provost Use Only	DTA	Provost/University designated awards for faculty employees. Only initiated only by the Provost Office.
Graduate Assistantship Lump Sum	GAL	Used to pay the lump sum for graduate appointments submitted after the mass lump sum has been loaded to the database automatically.
Grievance Settlements	GRV	Payment authorized by grievance officer upon the settlement of a grievance.
Taxable Housing Allowance	HAL	Used to cover housing expenses for new hires who are in the process of moving to the University area.
Longevity	LON	Currently used for AFSCME & MSEA bargaining units.
Meal & Energy Allowance	MEL	Used by Extended University Programs for off-campus teaching assignments.
Named Professorship	NPR	Awards identified and awarded by the President.
Performance Incentive	PER	Bonus for exceptional work, such as successful completion of a large project.
Phone Allowance	FON	Used when cell (or other) phones are required to be carried as part of the job.
Shoe Allowance	SHO	Used when special shoes are required as part of the job.
Staff Award **	SAW	Awards for staff employees. Examples include: Make A Difference awards, college staff awards (e.g. Employee of the Year), unit awards (e.g. Energy Savings award).
Student Award*	STW	Awards for student employees. Examples include: departmental awards, unit awards, college awards.
Teaching Endorsement Program	TEP	Completion stipend for Faculty who attend the e-teaching program.
Training	TRG	Used for employees who must attend training prior to teaching the First Year Experience seminar.
West Hills Per Incentive	WHC	Used by West Hills per supplemental pay policy.

Appendix H – Workflow Request Forms

PSHR Electronic Workflow Access Authorization

Complete this form to gain access (as an Initiator or an Approver) to the PSHR Electronic Workflow system. Form is found on the HR Web site at:
http://www.wmich.edu/hr/forms/access

PSHR Electronic Workflow Approval Rule Change Request

Complete this form to add or change workflow routing attributes. Form is found on the HR Web site at: http://www.wmich.edu/hr/forms/access