PSHR WMU Electronic Workflow

Graduate Appointment Forms

December 2009
Introduction:

The PeopleSoft Workflow Solution:

• No Lost Forms!

• Allows for online tracking.

• Access to historical Electronic forms.

• No Paper!
Phase II:

**Hourly Student Appointment Form**
- WMU Hourly Student Appointment Forms are used to appoint WMU students to university student jobs. Live Oct 2009.

**Graduate Appointment Form**
- Used to appoint Graduate students to Graduate College fellowships, associateships, and assistantships in teaching, research and non-teaching positions.
Electronic Workflow Process:

1) Initiator completes and submits **WMU Electronic Workflow Form**.

2) Form is automatically routed to pre-determined Approver(s). GAs have at least two.

3) Approver(s) (including limit approver) will review and approve, deny, or recycle the **WMU Electronic Workflow Form**.

4) Form authorized for entry and/or payment.

5) Form must be at ‘Authorized’ status on or before the ‘Forms Due Date’ to be considered on time.
Roles & Responsibilities:

**Initiator** = The person who initiates the **WMU Electronic Workflow Form**.

- Gather data needed to process form.
  - For GAs, this includes the Appointment Letter.
  - If a grant, ensure dates are within the grant begin and end dates.
- Complete and submit form.
- Track form.

*See Page 16 of User Guide*
Roles & Responsibilities:

**Approver** = Responsible for reviewing and approving, denying, or recycling the **WMU Electronic Workflow Form**.

- Primary and Alternate.
- Will receive an e-mail.
- Review form within 48 hours of submission.
- Conduct off-line conversation if necessary.
- Take Action.

*See Page 20 of User Guide*
What’s New?! 

• WIN is required.
• Drop down box to select Appointment Form type.
• Appointment Type – a lot of them!
• Multiple Fields default based on Appointment Type.
• Appointment Dates must fall within semester/session date parameters.
• Term date is required.
What’s New?!

- Pay rates are defaulted, but can be changed.
- Letter of Offer required.
- Grant Approval Routing.
- Grant dates checked against grant table.
- Graduate College Approval Routing.
- Limit Approver.
- Duplicate Jobs.
Live Demonstration:
Tracking WMU Electronic Workflow Forms:

1) Log into PeopleSoft via GoWMU.
2) Search for form via the WMU Workflow ‘link’.
   See Page 30 of User Guide

Canceling a Form:

1) Access form from WMU WorkFlow – Existing form.
2) Click the ‘Cancel This Appointment’ box at bottom of form.
   See Page 24 of User Guide
Re-working a Recycled Form:

• You will get an e-mail.
• Access form from your Worklist.
• On form, Must click ‘Update Appointment Information’ box to change data.
• Correction of a G/L Combo Code requires a new appointment form.
• A comment box will appear for new comments.

See Page 26 of User Guide
Graduate College

- Letter of Offer.
- Spreadsheet.
- Stipend / Pay Rate.
  - General info needed in Description of Work.
  - Comments.
  - Late Appointments.
- Funding Levels (Full, \( \tfrac{3}{4} \), etc).
- Health Insurance.
Other Good Things to Know:

• Revised User’s Guide is accessible in the form by clicking on the Guide link at the top.
  • Includes ‘Hints’ and GA descriptions

• FICA is charged if student has a temp STAFF job (e.g. a Part-time Instructor)
  • FICA is also charged if student is under-enrolled.
  • FICA NOT charged for multiple GA jobs IF student exemption is met.
Other Good Things to Know, con’t:

• More information on the HR Web site under the Electronic Workflow link.

• Use ‘View All’ on your worklist to see all items to be worked.

• Transaction forms must still be submitted using the Student Employment Online Transaction (SEOT) system.
Frequently Asked Questions:

• What do I need to do if I submit the appointment late?
  – Contact the Grad College to discuss prorating the stipend.

• How can I tell if my Grad Assistant is being paid correctly?
  – Use the Management Data Report to verify the data (e.g. stipend amount, appointment type, dates, etc).

• I want to pay my GA before the semester date starts. What do I do?
  – You can pay the GA on an Hourly Student Appointment form.
Frequently Asked Questions:

- My GA is terminating early. What do I do?
  - Submit a GA Transaction form for a termination/separation.
  - Submit a KRONOS correction form to Payroll to STOP payment.
  - Inform the Graduate College of the early separation.
  - If the student is on a scholarship or receiving an award, inform Student Financial Aid of the early separation.
Who To Contact:

• Graduate Student Policies and Pay
  – Graduate College

• Appointment Form Completion
  – HR Services

• KRONOS / FICA issues
  – Payroll

• GoWMU, System Logon and Password issues
  – OIT Help Desk
Questions?

Thanks for Coming!