Overview of WMU Electronic Workflow Forms

- WMU Incidental Pay Form
  
- WMU Temporary Faculty/Staff Appointment Form

- WMU Hourly Student Appointment Form

- WMU Graduate Appointment Form

Requesting User Access

Web Browser Requirements

Accessing the WMU Electronic Workflow Form Panels

Initiator Roles

- Processing a WMU Incidental Pay Form

- Processing a WMU Temporary Faculty/Staff Appointment Form

- Processing a WMU Student Appointment Form

- Processing a WMU Graduate Appointment Form

Approver Roles

- Processing a WMU Electronic Workflow Form

  SAMPLE Worklist

Canceling a WMU Electronic Workflow Form

Re-working a Recycled WMU Electronic Workflow Form

Tracking WMU Electronic Workflow Forms

  SAMPLE Process Log

Accessing a Timeout Worklist Item

Helpful Hints

Appendix A – WMU Electronic Workflow Form Screen Shots

Appendix B – Glossary of Terms

Appendix C – Appointment Type Definitions

Appendix D – Contact Information

Appendix E – Troubleshooting Error Messages

Appendix F – Process Status Definitions

Appendix G – Incidental Pay Code Definitions

Appendix H – Workflow Request Forms
Overview of WMU Electronic Workflow Forms

WMU Incidental Pay Form – 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 Academic Awards, and Student Awards will be grossed up automatically. **Faculty and Staff Awards can be grossed up upon request. 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.

WMU Temporary Faculty/Staff Appointment Form
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.html](http://www.wmich.edu/hr/forms.html). 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](mailto:sara.anderson@wmich.edu) or 387-2984.

Web Browser Requirements

The PSHR WMU Electronic Workflow works best with Internet Explorer version 7.0 or 8.0. 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 on the ‘Main Menu’ link to get to the menu listings.

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

3) Click on a folder to display the individual options.
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 WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU Workflow Forms.
   c) ‘Click’ on WMU - Incidental Pay Form.
   d) ‘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.
   o G/L Combo Code = Fund + Department + Account (Account defaults upon selection of Earnings Code).
   o 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 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. Once the form is submitted, it is routed immediately to the Approver’s worklist.

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).

   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.

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 paysheet. If it is necessary to cancel an Incidental Pay after it has been loaded to the paysheet, contact the Payroll office (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 WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU Workflow Forms.
   c) ‘Click’ on WMU – Appointment Form.
   d) Select the Temp Faculty/Staff Appt Form from the WMU Form Type drop down box
   e) ‘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 not 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 not 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 worklist.

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.

   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 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.

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 worklist 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: 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 WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU Workflow Forms.
   c) ‘Click’ on WMU – Appointment Form.
   d) Select the Hourly Student Appt Form from the WMU Form Type drop down box.
   e) ‘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
   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.

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. Choose a different job code and resubmit the form.

   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:

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.

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 worklist.

5) Submit Form

   a) ‘Click’ the ‘Save’ button at the bottom of the panel.
      i. The WMU Student Appointment Form will automatically be routed to the appropriate approver(s).
b) The WMU – Student Appointment Form ID number will appear at the top of the panel when “Saved”.
   i. The WMU Student 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.

   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 worklist 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.
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 WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU Workflow Forms.
   c) ‘Click’ on WMU – Appointment Form.
   d) Select the Graduate Appointment Form from the WMU Form Type drop down box.
   e) ‘Click’ Add.

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

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. 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 not 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 (PGC)BLV/GC

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>(D) ___ /GC</td>
<td>(Department funded), 2-4 digit hiring departments acronym and Graduate College</td>
</tr>
<tr>
<td>(PGC) ___ /GC</td>
<td>(Provost/Graduate College funded), 2-4 digit hiring departments acronym and Graduate College</td>
</tr>
<tr>
<td>(G) ___ /GC</td>
<td>(Grant funded), 2-4 digit hiring departments acronym and Graduate College</td>
</tr>
</tbody>
</table>

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 worklist.

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.

   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 worklist 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.
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 Workflow Worklist. An e-mail is sent to the Approver stating that a form has been added to the Approver's worklist. 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 Worklist
   a) ‘Click’ on Worklist under Menu on the left hand side of screen.
   b) ‘Click’ on Worklist.
   c) ‘Click’ on link to open appropriate form.

Note: To sort by form type, “Click” on Worklist Filter and select Form Type or leave blank to see all form types.

WHAT IS THE WORKLIST?

The Worklist is a panel containing a list of forms (items) that are 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 the worklist.
SAMPLE WORKLIST

<table>
<thead>
<tr>
<th>From</th>
<th>Date From</th>
<th>Work Item</th>
<th>Worked By Activity</th>
<th>Priority</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anders</td>
<td>10/08/2009</td>
<td>WMU_TA_RECYLE_WL</td>
<td>WMU_TA_SUBMIT_ACTIVITY</td>
<td></td>
<td>WMU_TA Form #6136</td>
</tr>
<tr>
<td>Schu</td>
<td>09/16/2009</td>
<td>WMU_TA_WL_CC_APPR</td>
<td>WMU_TA_APPROVAL_ACTIVITY</td>
<td></td>
<td>WMU_TA Form #6124 (Anderson-Woods)</td>
</tr>
<tr>
<td>Madd</td>
<td>09/16/2009</td>
<td>WMU_TA_WL_CC_APPR</td>
<td>WMU_TA_APPROVAL_ACTIVITY</td>
<td></td>
<td>WMU HSA Form #33 (Anderson-Woods)</td>
</tr>
<tr>
<td>Madd</td>
<td>09/16/2009</td>
<td>WMU_TA_WL_CC_APPR</td>
<td>WMU_TA_APPROVAL_ACTIVITY</td>
<td></td>
<td>WMU HSA Form #38 (Anderson-Woods)</td>
</tr>
</tbody>
</table>

- **From** - lists the previous approver or initiator who has taken action on the form.
- **Date From** – the date the form was forwarded to you from the previous approver/initiator.
- **Work Item** – describes the action that was last performed on the form.
- **Worked By Activity** – the last action to be taken on the form; ‘Submit’ means the form was submitted by an initiator ~you are the first approver in the routing sequence. ‘Approval’ means the form was approved by a previous approver in the routing sequence ~ you may be the second (or third) level approver.
- **Link** – clicking on the form link will take you to the form on the workflow page. Once you are at the appropriate form, you can take action on the form.

3) Review 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 worklist 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 action prior to submitting the form, ‘Click’ on ‘View Worklist’ button 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 worklist.

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!** Worklists can be more than one page long. To see all forms on your worklist, please click on ‘View All’. The number of forms on your worklist can be determined by looking at the display. If you have more than one page of forms, the display will let you know how many are currently viewable (e.g. 1-25 of 30).

---

**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 worklist?
      • If YES, see 2A) *Access the WMU Electronic Workflow Form*
   2) Is the form on YOUR worklist? (e.g. has been recycled back to you)
      • If YES, see 2B) *Access Worklist*

2A) Access the *WMU Electronic Workflow Form*
   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU Workflow Forms.
   c) ‘Click’ on WMU – Appointment or Incidental Pay Form.
   d) ‘Click’ the Find an Existing Value tab.
   e) 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.
   f) Go to STEP 3

2B) Access Worklist:
   a) ‘Click’ on Worklist under Menu on the left hand side of screen.
   b) ‘Click’ on Worklist.
   c) ‘Click’ on link to open appropriate form.
      i. *The word ‘RECYCLED’ will be included under work item description.*
   d) 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 (First | 1 of 1 | Last).

**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 paysheet. If it is necessary to cancel an Incidental Pay Form after it has been loaded to the paysheet, 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 **WMU Electronic Workflow Form**, the system will route the form back to the Initiator’s worklist. 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 Worklist:
   g) ‘Click’ on Worklist under Menu on the left hand side of screen.
   h) ‘Click’ on Worklist.
   i) ‘Click’ on link to open appropriate form.
      i. The word ‘RECYCLED’ will be included under work item description.
3) 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.

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 can be revised and re-submitted.

Note: The Initiator can also choose to cancel the WMU Electronic Workflow Form or not change any data, enter new comments and resubmit the form.
5) Add comments

b) 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).

Tracking WMU Electronic Workflow Forms

1) Log into PeopleSoft

   a) See Accessing the WMU Electronic Workflow Form Panels.

2) Access Form

   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU Workflow Forms.
   c) ‘Click’ on desired form type.
   d) ‘Click’ on the Find an Existing Value Tab.
   e) 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.
f) Select appropriate Workflow form. If selecting an Appointment Form, choose form from the WMU Form Type drop down box.
3) Review Status

   a) The 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’ worklist. 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**

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

**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 worklist.

**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 worklist, the person responsible for working the item will have 48 hours to take action. If a worklist item that is currently assigned to you has timed out, you will receive an e-mail notification with the subject line of 'Timeout Worklist'. The e-mail will indicate an instance ID number for reference. The timeout notification does NOT remove the item from your worklist. You must still take action on the item.

### Accessing a Timeout Worklist Item

1) Log into PeopleSoft
   
   a) See *Accessing the WMU Electronic Workflow Form Panels*.

2) Access Worklist
   
   a) ‘Click’ on Worklist under Menu on the left hand side of screen.
   b) ‘Click’ on the Detail View link.
   c) Scroll to the right hand side of the page to view instance ID number. The comments section will state 'Auto Timeout'.

3) Follow steps outlined under *Processing a WMU Electronic Workflow Form – Approver Role*.
Note: If no action has been taken on an item in your worklist for 48 hours, you will receive an e-mail reminding you an unworked item is on your list that needs review. The timeout notification does NOT remove the item from your worklist. You must still take action on the item.

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 Worklist, 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: 06/24/2008

Payee Information

*Empl ID: ___________________________ Name: ___________________________
Job Title: ___________________________

Payment Information

*Earnings Code: ______________________ *Charge To Gl Combo Code: ____________
Payment Amount: ______________________

Comments

Comment #: __________________________ by: ___________________________
Date/Time: __________________________

WMU Approval Rule Set:

Process Log

Step   Action   Available Date Time   Action Date Time   Seq   Name
1

Approval Action

☐ Approve  ☐ Deny  ☐ Recycle

Payroll Run ID: ______________________
Paycheck Date: ______________________
Appendix A – WMU Electronic Workflow Form Screen Shots
Temporary Faculty/Staff Appointment Form with Part Time Instructor Pay Components

[Image of the WMU Appointment Form with fields filled in]

Description of Work:

Pay Components:

<table>
<thead>
<tr>
<th>Rate Code</th>
<th>Descr</th>
<th>Comp Rate</th>
<th>Comp Freq</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>A</td>
<td></td>
<td>USD</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>A</td>
<td></td>
<td>USD</td>
</tr>
</tbody>
</table>

Comments:

Comment #: by: Date/Time:

WMU Approval Rule Set:

[Table showing process log with steps and actions]

Approval Action:

- [ ] Approve
- [ ] Deny
- [ ] Recycle

[Administrative Use section with fields filled in]

[Save button]
NEW REQUIREMENT for Summer II 2014 – add Acronym to Location of Letter box. See pg. 17
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Begin Date</td>
<td>The effective date the appointment starts.</td>
</tr>
<tr>
<td>Account</td>
<td>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).</td>
</tr>
<tr>
<td>Appointment End Date</td>
<td>The effective date that the appointment is scheduled to end.</td>
</tr>
<tr>
<td>Appointment Period</td>
<td>Timeframe during which the person is employed.</td>
</tr>
<tr>
<td>Approved</td>
<td>The form has been okayed by an Approver and forwarded to the next Approval level for review.</td>
</tr>
<tr>
<td>Approver(s)</td>
<td>Responsible for reviewing and approving, denying, or recycling WMU Electronic Workflow Forms.</td>
</tr>
<tr>
<td>Authorized</td>
<td>The final approval has been made and the form is ready for entry/payment.</td>
</tr>
<tr>
<td>Contract Pay</td>
<td>Pay Type for salaried appointments less than one year in duration.</td>
</tr>
<tr>
<td>Earnings Code</td>
<td>Code/Description used on Incidental Pay form for non-hours related payments.</td>
</tr>
<tr>
<td>EmplID</td>
<td>A unique ID number assigned to employees upon initial hire onto the database.</td>
</tr>
<tr>
<td>Form Number</td>
<td>Unique number assigned by the system for each initiated request.</td>
</tr>
<tr>
<td>FTE</td>
<td>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.</td>
</tr>
<tr>
<td>G/L Combo Code</td>
<td>The Fund + Department + Account that is being charged.</td>
</tr>
<tr>
<td>I-9 Date</td>
<td>Date the I-9 form (Employment Eligibility Verification) was completed &amp; verified.</td>
</tr>
</tbody>
</table>
**Appendix B Continued – Glossary of Terms**

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator</td>
<td>The person who submits the WMU Electronic Workflow Form.</td>
</tr>
<tr>
<td>Mail Stop</td>
<td>A four digit code assigned departments by Freight/Postal/Delivery for mail and other delivery purposes.</td>
</tr>
<tr>
<td>Postal</td>
<td>The Zip Code (or other non-US postal code).</td>
</tr>
<tr>
<td>Process Status</td>
<td>Indicates where the request is in the process. See Appendix F for status definitions.</td>
</tr>
<tr>
<td>Step</td>
<td>Used with Student Grade level to allow for experience and length of service.</td>
</tr>
<tr>
<td>Stipend/Salary</td>
<td>The semester/session salary pay rate for a Graduate appointment.</td>
</tr>
<tr>
<td>WIN</td>
<td>Western Identification Number – a unique identifier number derived by the Banner system. All WMU employees and students have a WIN.</td>
</tr>
<tr>
<td>Worklist</td>
<td>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 the worklist.</td>
</tr>
<tr>
<td>Work Study</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Part Time Instructors (PIO & Non PIO) Payment Types**

<table>
<thead>
<tr>
<th>PIO Pay Component Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BASE</td>
<td>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.</td>
</tr>
<tr>
<td>OTHER</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Appendix B– Glossary of Abbreviations (Graduate Appointments)

<table>
<thead>
<tr>
<th>Appointment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GA</td>
<td>Graduate Assistantship</td>
</tr>
<tr>
<td>DGA</td>
<td>Doctoral Graduate Assistantship</td>
</tr>
<tr>
<td>DA</td>
<td>Doctoral Associateship</td>
</tr>
<tr>
<td>TM</td>
<td>Thurgood Marshall Assistantship</td>
</tr>
<tr>
<td>TMD</td>
<td>Thurgood Marshall Doctoral Associateship</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Salary Admin Plan</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GAT</td>
<td>Teaching</td>
</tr>
<tr>
<td>GAN</td>
<td>Non-Teaching (No Longer used effective with Spring 2012)</td>
</tr>
<tr>
<td>GAR</td>
<td>Research (No Longer used effective with Spring 2012)</td>
</tr>
<tr>
<td>GAD</td>
<td>Research – Discovery (for appointments in grants funds 25 through 30 (New SAP effective with Spring 2012)</td>
</tr>
<tr>
<td>GAA</td>
<td>Research – Application (New SAP effective with Spring 2012)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grade (Funding Level)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FUL</td>
<td>Full time Appointment</td>
</tr>
<tr>
<td>3/4</td>
<td>Three quarter time (¾) Appointment</td>
</tr>
<tr>
<td>2/3</td>
<td>Two third time (2/3) Appointment</td>
</tr>
<tr>
<td>1/2</td>
<td>Half time (½) Appointment</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade</th>
<th>Assignment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Additional Faculty Appointment (Instructional)</strong></td>
<td>n/a</td>
<td><strong>Regular Faculty Appt Types</strong>  &lt;br&gt; F30 – Fall Semester  &lt;br&gt; F31 – Spring Semester  &lt;br&gt; F32 – Summer I Session  &lt;br&gt; F33 – Summer II Session  &lt;br&gt; F34 – Summer 15 Weeks</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Faculty Specialist Appt Types</strong>  &lt;br&gt; I01 – Fall Semester  &lt;br&gt; I04 – Spring Semester  &lt;br&gt; I07 – Summer I Session  &lt;br&gt; I12 – Summer II Session</td>
<td></td>
</tr>
<tr>
<td><strong>Additional Faculty Appointment (Non-Instructional)</strong></td>
<td>n/a</td>
<td><strong>Regular Faculty Appt Types</strong>  &lt;br&gt; F51 – Variable  &lt;br&gt; F52 – Fall Semester  &lt;br&gt; F53 – Spring Semester  &lt;br&gt; F54 – Summer I Session  &lt;br&gt; F55 – Summer II Session  &lt;br&gt; F56 – Summer 15 Weeks</td>
<td>Faculty who are performing non-instructional duties, such as summer advising, grant research, administrative duties, etc.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Faculty Specialist Appt Types</strong>  &lt;br&gt; I15 – Variable  &lt;br&gt; I03 – Fall Semester  &lt;br&gt; I06 – Spring Semester  &lt;br&gt; I09 – Summer I Session  &lt;br&gt; I14 – Summer II Session</td>
<td></td>
</tr>
<tr>
<td><strong>Faculty Overload Appointment</strong></td>
<td>n/a</td>
<td><strong>Regular Faculty Appt Types</strong>  &lt;br&gt; F40 – Fall Semester  &lt;br&gt; F41 – Spring Semester  &lt;br&gt; F42 – Summer I Session  &lt;br&gt; F43 – Summer II Session  &lt;br&gt; F44 – Summer 15 Weeks</td>
<td>Teaching load beyond the contractual maximum full-time workload in any given semester or session. Paid at overload rates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Faculty Specialist Appt Types</strong>  &lt;br&gt; I02 – Fall Semester  &lt;br&gt; I05 – Spring Semester  &lt;br&gt; I08 – Summer I Session  &lt;br&gt; I13 – Summer II Session</td>
<td></td>
</tr>
</tbody>
</table>
## Appendix C Continued - Faculty Appointments

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade</th>
<th>Assignment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individualized Assignment Faculty Appointment</td>
<td>n/a</td>
<td>F65 - Variable – Faculty member is benefits eligible F66 — Variable – Faculty member is non-benefits eligible</td>
<td>To be used 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). <strong>Also can be used for when a faculty member needs to be paid an hourly rate.</strong></td>
</tr>
<tr>
<td>Part-time Instructor Non-PIO</td>
<td>PT1</td>
<td>F20 – Fall Semester F21 – Spring Semester F22 – Summer I Session F23 – Summer II Session F24 – Summer 15 Weeks F25 – ATYP variable</td>
<td>Appointed on a semester by semester basis; not board approved. Not a part of the PIO bargaining unit. <strong>⇒ EMPLOYEE is not benefit eligible.</strong></td>
</tr>
<tr>
<td>Part-time Instructor Non-PIO</td>
<td>PT1</td>
<td>F15 – Fall Semester F39 – Spring Semester F49 – Summer I Session F99 – Summer II Session F – Summer 15 Weeks F – ATYP variable</td>
<td>Appointed on a semester by semester basis; not board approved. Not a part of the PIO bargaining unit. <strong>⇒ EMPLOYEE holds a Benefit Eligible position at WMU in addition to this appointment.</strong></td>
</tr>
<tr>
<td>Part-time Instructor (PIO) Non-Continuing</td>
<td>PT2</td>
<td>F91 – Fall Semester F92 – Spring Semester F93 – Summer I Session F90 – Summer II Session F94 – Summer 15 Weeks</td>
<td>Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. <strong>⇒ EMPLOYEE is not benefit eligible.</strong></td>
</tr>
<tr>
<td>Part-time Instructor (PIO) Non-Continuing</td>
<td>PT2</td>
<td>F16 – Fall Semester F38 – Spring Semester F48 – Summer I Session F98 – Summer II Session F – Summer 15 Weeks</td>
<td>Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. <strong>⇒ EMPLOYEE holds a Benefit Eligible position at WMU in addition to this appointment.</strong></td>
</tr>
<tr>
<td>Part-time Instructor (PIO) Continuing</td>
<td>PT3</td>
<td>F86 – Fall Semester F87 – Spring Semester F88 – Summer I Session F85 – Summer II Session F89 – Summer 15 Weeks</td>
<td>Appointed on a semester by semester basis; not board approved. Part of the PIO bargaining unit. <strong>⇒ EMPLOYEE is not benefit eligible.</strong></td>
</tr>
</tbody>
</table>
### Appendix C Continued - Faculty Appointments

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade</th>
<th>Assignment Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Part-time Instructor (PIO) Continuing | PT3 Benefit Elig | 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 | To be used when an AAUP or non-benefits eligible faculty member fills in for another faculty member on a short term duration (e.g. to cover several classes on one day or several days of classes). |
| 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 Semester  
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

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade</th>
<th>Assignment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temporary Non-Exempt – Additional Appointment *</td>
<td>N99</td>
<td>H00</td>
<td>Use for current WMU benefits-eligible employees who are performing additional non-exempt work (outside of normal workload) *</td>
</tr>
<tr>
<td>Temporary Non-Exempt  *</td>
<td>N99</td>
<td>H01</td>
<td>Use for non-benefit eligible employees performing non-exempt work. *</td>
</tr>
<tr>
<td>Temporary Non-Exempt</td>
<td>N99</td>
<td>H02</td>
<td>Used only for persons employed at Miller Auditorium as stagehands.</td>
</tr>
</tbody>
</table>
*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
  - Graduate assistantship appointments
  - Additional appointments for senior administrative officers holding faculty rank

NOTE: For additional information see PPM Section 3 – Employment Practices: Other Appointments: [www.wmich.edu/hr/policies/ppm/03-employment-6.html](http://www.wmich.edu/hr/policies/ppm/03-employment-6.html)

### Appendix C Continued - Hourly STUDENT Appointments

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade</th>
<th>Assignment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Student Appointment</td>
<td>A1 – A4, B1 – B4, C1 – C4, D1 – D4, Q</td>
<td>001</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Appendix C - Salaried Appointments
<table>
<thead>
<tr>
<th>Title</th>
<th>Grade</th>
<th>Assignment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temporary Exempt</td>
<td>E99</td>
<td>S04</td>
<td>This appointment type is no longer used. See page 42 for the policy change.</td>
</tr>
<tr>
<td>Salaried Administrative Officer with faculty rank (formerly Temp Exempt – Additional Appointment)</td>
<td>E99</td>
<td>S02</td>
<td>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.</td>
</tr>
<tr>
<td>Title</td>
<td>Grade</td>
<td>Assignment Type</td>
<td>Teaching</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td>Graduate Assistantship (GA)</td>
<td>FUL</td>
<td>FALL</td>
<td>001</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>061</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>121</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>181</td>
</tr>
<tr>
<td></td>
<td>3/4</td>
<td>FALL</td>
<td>002</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>062</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>122</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>182</td>
</tr>
<tr>
<td></td>
<td>2/3</td>
<td>FALL</td>
<td>003</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>063</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>123</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>183</td>
</tr>
<tr>
<td></td>
<td>1/2</td>
<td>FALL</td>
<td>004</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>064</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>124</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>184</td>
</tr>
<tr>
<td>Doctoral Graduate Assistantship (DGA)</td>
<td>FUL</td>
<td>FALL</td>
<td>005</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>065</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>125</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>185</td>
</tr>
<tr>
<td></td>
<td>3/4</td>
<td>FALL</td>
<td>006</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>066</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>126</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>186</td>
</tr>
<tr>
<td></td>
<td>2/3</td>
<td>FALL</td>
<td>007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>067</td>
</tr>
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<td></td>
<td>Summer II</td>
<td>187</td>
</tr>
<tr>
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<td>1/2</td>
<td>FALL</td>
<td>008</td>
</tr>
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<td></td>
<td></td>
<td>Spring</td>
<td>068</td>
</tr>
<tr>
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<td>128</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>188</td>
</tr>
<tr>
<td>Doctoral Associateship (DA)</td>
<td>FUL</td>
<td>FALL</td>
<td>009</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>069</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer I</td>
<td>129</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer II</td>
<td>189</td>
</tr>
<tr>
<td>Doctoral Associateship (DA)</td>
<td>3/4</td>
<td>FALL</td>
<td>010</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring</td>
<td>070</td>
</tr>
<tr>
<td></td>
<td></td>
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<td>130</td>
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<td></td>
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<td>Summer II</td>
<td>190</td>
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<tr>
<td>Type</td>
<td>Application</td>
<td>Discovery</td>
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</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------------</td>
<td>-----------</td>
<td></td>
</tr>
<tr>
<td>Doctoral Associateship (DA)</td>
<td>FALL 011</td>
<td>031</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring 071</td>
<td>091</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer I 131</td>
<td>151</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer II 191</td>
<td>211</td>
<td></td>
</tr>
<tr>
<td>Doctoral Associateship (DA)</td>
<td>FALL 012</td>
<td>032</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring 072</td>
<td>092</td>
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<td></td>
<td>Summer I 132</td>
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</tr>
<tr>
<td></td>
<td>Summer II 192</td>
<td>212</td>
<td></td>
</tr>
<tr>
<td>Thurgood Marshall Assistantship (TM)</td>
<td>FALL 301</td>
<td>304</td>
<td></td>
</tr>
<tr>
<td>Thurgood Marshall Doctoral Associateship (TMD)</td>
<td>Spring 250</td>
<td>253</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer I 241</td>
<td>244</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer II 286</td>
<td>289</td>
<td></td>
</tr>
<tr>
<td>Graduate Assistantship (GA)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring 250</td>
<td>253</td>
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<tr>
<td></td>
<td>Summer I 241</td>
<td>244</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer II 286</td>
<td>289</td>
<td></td>
</tr>
<tr>
<td>Doctoral Graduate Assistantship (DGA)</td>
<td>FALL 302</td>
<td>305</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring 251</td>
<td>254</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer I 242</td>
<td>245</td>
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<td></td>
<td>Summer II 287</td>
<td>290</td>
<td></td>
</tr>
<tr>
<td>Doctoral Associateship (DA)</td>
<td>FALL 303</td>
<td>306</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring 252</td>
<td>255</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer I 243</td>
<td>246</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer II 288</td>
<td>291</td>
<td></td>
</tr>
</tbody>
</table>

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.

¾ time appointments must ALWAYS be used in conjunction with another appointment, and cannot be used as a ‘stand alone’ appointment.
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.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>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)</td>
<td>Approval rule set data is missing.</td>
</tr>
<tr>
<td>You are not authorized to access this component. (40,20)</td>
<td>This error message was received while trying to access reports. This message indicates that you do not have access to reporting in PSHR.</td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>ERROR - Page not found</td>
<td>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.</td>
</tr>
<tr>
<td>SAVING ISSUE – The appointment form is not saving and cursor is spinning.</td>
<td>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.</td>
</tr>
<tr>
<td>Issue</td>
<td>Solution</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Site name is not valid. Check your url syntax and try again.</td>
<td>The user is not entering the correct URL address.</td>
</tr>
<tr>
<td>Data being added conflicts with existing data. If the problem persists...</td>
<td>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.</td>
</tr>
<tr>
<td>Appointment form is not saving and cursor is spinning.</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Process Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized</td>
<td>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.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The initiator has stopped the form; the form can no longer be processed and will not be paid.</td>
</tr>
<tr>
<td>Denied</td>
<td>An approver has stopped the form; the form can no longer be processed and will not be paid.</td>
</tr>
<tr>
<td>Loaded to DB (Loaded to Database)</td>
<td>HR has entered the appointment to the PeopleSoft database and is now ready for Payroll to update the paysheet.</td>
</tr>
<tr>
<td>Loaded to Pay Sheet</td>
<td>Payroll has added the payment to the payroll paysheets.</td>
</tr>
<tr>
<td>New Form</td>
<td>A form has been initiated.</td>
</tr>
<tr>
<td>Paid</td>
<td>A paycheck has been issued to the employee.</td>
</tr>
<tr>
<td>Recycled</td>
<td>A form has been sent back to the initiator for revision. The form will appear on the initiator’s worklist.</td>
</tr>
<tr>
<td>Routed (Routed for Approval)</td>
<td>The form is moving through the approvals signature path.</td>
</tr>
<tr>
<td>Skipped</td>
<td>A Primary approver, who has multiple approver levels, has already approved the form.</td>
</tr>
</tbody>
</table>
## Appendix G – Incidental Pay Code Definitions

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

<table>
<thead>
<tr>
<th>IP Type</th>
<th>IP Code</th>
<th>IP Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>* denotes these earnings codes will be automatically grossed up</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Award *</td>
<td>AAD</td>
<td>Faculty awards determined by College or Department – not a University wide award.</td>
</tr>
<tr>
<td>Automobile Lease Payments</td>
<td>AUC</td>
<td>Used when a University car is provided to an employee as part of job.</td>
</tr>
<tr>
<td>Clothing Allowance</td>
<td>CLO</td>
<td>Used when a uniform is required to be worn by employee.</td>
</tr>
<tr>
<td>Faculty Award**</td>
<td>DTA</td>
<td>Awards for faculty employees. **can be grossed up upon request via the IP form</td>
</tr>
<tr>
<td>Graduate Assistantship Lump Sum</td>
<td>GAL</td>
<td>Used to pay the lump sum for graduate appointments submitted after the mass lump sum has been loaded to the database</td>
</tr>
<tr>
<td>Grievance Settlements</td>
<td>GRV</td>
<td>Payment authorized by grievance officer upon the settlement of a grievance.</td>
</tr>
<tr>
<td>Taxable Housing Allowance</td>
<td>HAL</td>
<td>Used to cover housing expenses for new hires who are in the process of moving to the University area.</td>
</tr>
<tr>
<td>Longevity</td>
<td>LON</td>
<td>Currently used for AFSCME &amp; MSEA bargaining units.</td>
</tr>
<tr>
<td>Meal &amp; Energy Allowance</td>
<td>MEL</td>
<td>Used by Extended University Programs for off-campus teaching assignments.</td>
</tr>
<tr>
<td>Named Professorship</td>
<td>NPR</td>
<td>Awards identified and awarded by the President.</td>
</tr>
<tr>
<td>Performance Incentive</td>
<td>PER</td>
<td>Bonus for exceptional work, such as successful completion of a large project.</td>
</tr>
<tr>
<td>Phone Allowance</td>
<td>FON</td>
<td>Used when cell (or other) phones are required to be carried as part of the job.</td>
</tr>
<tr>
<td>Shoe Allowance</td>
<td>SHO</td>
<td>Used when special shoes are required as part of the job.</td>
</tr>
<tr>
<td>Staff Award **</td>
<td>SAW</td>
<td>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). **can be grossed up upon request via the IP form</td>
</tr>
<tr>
<td>Student Award*</td>
<td>STW</td>
<td>Awards for student employees. Examples include: departmental awards, unit awards, college awards.</td>
</tr>
<tr>
<td>Teaching Endorsement Program</td>
<td>TEP</td>
<td>Completion stipend for Faculty who attend the e-teaching program.</td>
</tr>
<tr>
<td>Training</td>
<td>TRG</td>
<td>Used for employees who must attend training prior to teaching the First Year Experience seminar.</td>
</tr>
</tbody>
</table>
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/ps-information-access-authorization.pdf

**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/ps-information-access-authorization.pdf