



# **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,  $\frac{3}{4}$ , 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!