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Revision History Log

<table>
<thead>
<tr>
<th>Publication Date</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2011</td>
<td>New version that supports Banner Human Resources 8.4 software.</td>
</tr>
<tr>
<td>October 2011</td>
<td>Revised version to support LCTCS End User Training.</td>
</tr>
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Introduction

Course goal

The goal of this course is to provide you with the knowledge and practice to accurately define persons and employees in Banner Human Resources.

Course objectives

In this course you will learn how to

- create and maintain person records
- create and maintain employee records.

Intended audience

Human Resources administrators and staff who are responsible for adding new employees to the Banner Human Resources system.

Prerequisites

To complete this course, you should have completed the Training Services web-based training (WBT) tutorial Banner 8 Fundamentals, or have equivalent experience navigating in the Banner system.
Process Introduction

Introduction

The Human Resource Office can

- create a record for a person or non-person who has never been identified to the system
- add or update biographic/demographic information about a person or non-person who was previously defined in Banner.

Flow diagram

This diagram highlights the processes used to enter a new employee into Banner Human Resources.

Legend

- Employee
- Human Resources Office

1. Provide pertinent information to the Human Resources Office
2. Ensure that the person does not already exist in Banner
3. Generate a new person in Banner
4. Enter employee biographic and demographic data into Banner
5. Enter employee skills, experience, medical and other general information into Banner
What happens

The stages of the process are described in this table.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Employee provides pertinent information to the Human Resources office.</td>
</tr>
<tr>
<td>2</td>
<td>The Human Resources office ensures that the person doesn't already exist in Banner.</td>
</tr>
<tr>
<td>3</td>
<td>Generate a new person in Banner.</td>
</tr>
<tr>
<td>4</td>
<td>Enter employee biographic and demographic information.</td>
</tr>
<tr>
<td>5</td>
<td>Enter employee skills, experience, medical, and other general information into Banner.</td>
</tr>
</tbody>
</table>
Creating and Maintaining Person Records

Section goal

The goal of this section is to explain the procedures for entering person records in the Banner Human Resources system.

Section objectives

In this section you will learn how to

• generate a person record
• capture person information (biographic/demographic)
• enter general information
• enter certification information
• enter person experience information
• enter international information
• enter email information.
Generating a Person Record

Introduction

The Identification Form (PPAIDEN) provides an entry into the Banner Human Resources system. It generates a unique ID number for each individual. The ID number and name are the minimum requirements to Save the record on the system.

The name entered on PPAIDEN appears on all paychecks and regulatory forms issued for an employee. Banner Human Resources does provide the capability to override the PPAIDEN name for W2 purposes only. This functionality will be reviewed in a later workbook.

The Identification Form shares data with all Banner forms, and can be updated.

In PPAIDEN, when you add a new person to the system, you can also add biographic/demographic data. The new person does not show up on the employee search form POIIDEN until you have completed the Employee Form PEAEMPL. However, the name of the person will appear on the Person Search Form SOAIDEN.

Required fields

The following fields are required in PPAIDEN when a person is being defined as an employee:

- birth date
- first name
- last name
- SSN/SIN/TIN
- address
- gender
- citizenship
- ethnicity
Note: Some fields on PPAIDEN are optional, and sometimes entire windows are optional.

Warning: Sorting is now done by using the last name from PPAIDEN instead of the last name from Payroll History table (PHRJOBS).

Banner form

![Banner form screenshot]

Steps

Follow these steps to generate a new person record for an employee.

Note: Before you begin, choose a fictitious name for the new person you will enter into the system. You will want to practice performing a search to ensure that the person you are entering is not already in the system.

1. Access the Identification Form (PPAIDEN).

2. Click the **Generate ID** icon.

   Note: When you click the **Generate ID** icon, the word “Generated” defaults to the **ID** field. This does not change until the record is saved.

3. Perform a **Next Block** icon.

4. Enter the employee’s social security number in the **SSN/ SIN/ TIN** field.

5. Optional- enter the person’s last name in the **Last Name Prefix** field.
6. Enter the person’s last name in the **Last Name** field.

   **Note:** Enter the Last Name *exactly* as it appears on the Social Security Card for payroll purposes, or per your institution’s data standards.

7. Enter the person’s first name in the **First Name** field.

8. Optional - enter the person’s middle name in the **Middle Name** field.

9. Optional - enter a suffix (M.D., Jr.) in the **Suffix** field.

10. Click the **Save** icon.

11. Click the **Biographical** tab.

12. Select the appropriate radio button for the employee’s gender in the **Gender** field.

13. Enter the employee’s date of birth in the **Birth Date** fields.

   **Warning:** The fields appear in Day/Month/Year order. Be careful to enter the day prior to the month.

14. Double-click in the **Citizenship** field and select a Citizen Type code.

15. Double-click in the **New Ethnicity** field and select the employee’s new ethnicity as defined by the government.

16. Click the **Ethnicity and Race Confirmed** checkbox is the employee’s ethnicity and race has been confirmed.

17. Double-click in the **Race** field to enter the employee’s race.

18. If the employee’s ethnicity and race has been confirmed, enter the date that it was confirmed in the **Confirmed Date** field.

19. Click the **Save** icon.

20. Complete the process

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>review the new record and add more information.</td>
<td>select the desired tab.</td>
</tr>
<tr>
<td>add another new employee</td>
<td>click the <strong>Generate ID</strong> icon.</td>
</tr>
<tr>
<td>exit this form.</td>
<td>click the <strong>X</strong> (Close) icon.</td>
</tr>
</tbody>
</table>
Entering Alternate Identification Information

Introduction

The **Alternate Identification** tab on PPAIDEN is used to enter a current, previous or alternate name for a person. This is helpful when you need to record name changes associated with marriages or divorces.

Banner form
**Steps**

Follow the steps below to enter alternate identification information.

21. Access the **Alternate Identification** tab.

22. Select the name type code from the **Name Type** and select a name type.

23. Select the change type code from the **Change Type** drop-down list.

24. Enter an alternate name for the person, such as a maiden name, in the **Last Name** field.

25. Enter the person’s first name in the **First Name** field.

26. Optional - enter the person’s middle name in the **Middle Name** field.

27. Click the **Save** icon.

   Note: When an employee changes his/her name on PPAIDEN, the alternate name field will be populated automatically in Banner.

28. Click the **Exit** icon.
Entering Address Information

Introduction

The Address tab on PPAIDEN allows you to enter or update an address. You can add details such as delivery points or carrier routes. Addresses are required for employees.

This window is optional for non-employee records such as Trustees or COBRA person beneficiaries. Some persons may have more than one address, such as a Mailing address and a Business address. These are referred to as Address Types. It is important that each address be entered with the appropriate Address Type. You can add multiple addresses or see an address history by clicking the Address Type list and selecting Addresses (PPIADDR).

Note: When checks are processed, the Address Type is a requirement of the payroll system. Be sure to use the same Address Type in PPAIDEN, as used by HR Payroll. For example, if the Address Type entered in PPAIDEN is CA (Campus Address) and the payroll address type is MA (Mailing Address), when payroll is processed, the system will not be able to identify an address for the paycheck.

Banner form

```
<table>
<thead>
<tr>
<th>ID:</th>
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<th>Generate ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Type:</td>
<td>PA ▪ Mailing</td>
<td></td>
</tr>
<tr>
<td>Sequence Number:</td>
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<td></td>
</tr>
<tr>
<td>House Number:</td>
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<td></td>
</tr>
<tr>
<td>Street Line 1:</td>
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<td></td>
</tr>
<tr>
<td>Street Line 2:</td>
<td></td>
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<tr>
<td>Street Line 3:</td>
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<tr>
<td>Street Line 4:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>Malm</td>
<td></td>
</tr>
<tr>
<td>State or Province:</td>
<td>PA ▪ Pennsylvania</td>
<td></td>
</tr>
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<td></td>
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<tr>
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<td>United States of America</td>
<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Area Code:</td>
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<tr>
<td>Phone Number:</td>
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<td></td>
</tr>
<tr>
<td>Extension:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```
Steps

Follow the steps below to update address information.

29. Access the **Address** tab.

30. Optional – enter dates in the **From Date** and **To Date** fields indicating when the person started living at that address. The **From** field defaults to the current day.

31. If the address is no longer active, select the **Inactive** field.

32. Double-click in the **Address Type** field and select the code identifying the type of address. Refer to Data Standards for Address Types

   Note: Banner defaults to the home address.

33. Enter the employee’s address in the **Street Line 1** field according to your institution’s data standards.

   Note: Street Line 1, 2, 3 and 4 fields are available. Data standards references the first two lines.

34. Enter the city associated with the address in the **City** field.

35. Double-click the **State or Province** field and select the state or province code.

36. Enter the zip code in the **ZIP or Postal Code** field.

   Note: You may also double-click the **ZIP or Postal Code** field and select the zip/postal code associated with the address. A search function is available.

37. Double-click the **County** field and select and return the county associated with the address.

38. You may enter “157” in the **Nation** field for the United States of America (check your institution’s data standards).

   Note: You can also double-click the **Nation** field and select the country code associated with the address. This is only required if the State/Province field is not complete.

39. Click the **Save** icon.

40. Select another tab to continue adding information or click the **Exit** icon.
Entering Telephone Information

Introduction

The **Telephone** tab on PPAIDEN allows you to add details regarding a person’s phone number and add comments. It automatically records the activity date when you save the record.

Banner form

**Steps**

Follow the steps below to enter current identification information.

41. Access the **Telephone** tab.

42. Double-click the **Telephone Type** field and select a telephone type.

43. Enter the employee’s phone number in the **Telephone** field.

44. Click the **Primary** checkbox if this is the person’s primary phone number for this address.

45. Click the **Save** icon.

46. Select another tab to continue adding information or click the **Exit** icon.
Entering Biographical Information

Introduction

The **Biographical** tab on the Identification Form (PPAIDEN) is used to enter biographic and demographic information for a person/employee.

Many of the fields such as, Date of Birth, Gender, and Citizenship are required for IPEDS reporting.

Note: You can select the **Confidential** option to mark this information as confidential. This tab is also used to record an employee's death.

Banner form

![Banner form image]
Steps

Follow these steps to add biographical information.

47. Access the Biographical tab.

48. Select the appropriate radio button for the employee’s gender in the Gender field.

   Note: The gender of an employee cannot be Unavailable.

49. Enter the employee’s date of birth in the Birth Date fields.

   Warning: The fields appear in Day/Month/Year order. Be careful to enter the day prior to the month.

50. Click the Confidential checkbox to mark this information as confidential.

   Note: The Confidentiality Indicator field is for reporting purposes only. If it is checked, it is displayed on the Letter Generation window. It has no effect on Employee Self Service data.

51. Do not check the Deceased field.

   Note: If the employee is deceased, the Date field should also be entered with the date of death. The employee's age at the time of death is calculated by the system. This field populates the Deceased box on the W2 report.

52. Add or edit the SSN/ SIN/ TIN field, if needed. The person’s age will be automatically calculated.

   Note: If you have already entered this information when you generated a new person record in PPAIDEN, the information will appear on this tab. You can edit this information here.

53. Double-click in the Citizenship field and select the employee’s citizenship.

54. Optional - Double-click in the Martial Status field and select the employee’s marital status.

55. Double-click in the New Ethnicity field and select the employee’s new ethnicity as defined by the government.

56. Click the Ethnicity and Race Confirmed checkbox if the employee’s ethnicity and race has been confirmed.

57. If the employee’s ethnicity and race has been confirmed, enter the date that it was confirmed in the Confirmed Date field.
58. Enter the file number in the **Veteran File Number** field, if the person is a veteran.

59. Double-click in the **Veteran Category** field and select a valid code if the person is a veteran.

60. Enter the date on which the individual separated or was discharged from active military duty in the **Active Duty Separation Date** field.

   Note: This date is used to classify veterans under the *newly separated veterans’ category* on the VETs-100 reports whose active duty separation date falls within the VETS reporting period.

61. Click the **Armed Forces Service Medal Indicator** checkbox if it applies.

62. Click the **Special Disabled Veteran** checkbox if the person is a veteran and disabled.

   Note: A special disabled veteran is either of the following:

   1) A veteran who is entitled to compensation (or who would be but for the receipt of military retired pay) under laws administered by the Department of Veteran Affairs for a disability (i) rated at 30% or more, or (ii) rated at 10 or 20% in the case of a veteran who has been determined under Section 1506 of Title 38, U.S, to have a serious employment handicap.

   2) A veteran who was discharged or released from active duty because of a service-connected disability.

63. Perform a **Next Block** icon.

64. Double-click in the **Race** field and select a race.

65. Click the **Save** icon.

66. Select another tab to continue adding information or click the **Exit** icon.
Entering E-mail Information

Introduction

The E-mail tab on PPAIDEN allows you to add details regarding a person's e-mail information and add comments. It automatically records the activity date when you save the record.

Banner form
Steps

Follow the steps below to enter e-mail information.

67. Click the E-mail tab.

68. Select an E-mail type in the E-mail Type field.

69. Enter the employee's e-mail address in the E-mail address field.

70. Click the Preferred checkbox if this is the person's preferred e-mail address.

71. Click the Save icon.

72. Select another tab to continue adding information or click the Exit icon.
# Entering Emergency Contact Information

## Introduction

The **Emergency Contact** tab on the Identification Form (PPAIDEN) is used to enter Emergency Contact Information for a person/employee.

The Emergency Contact information is optional. If you do choose to maintain this information, the Name and Priority fields are required. The Emergency Contact list may be prioritized according to the order in which the contacts should be notified of an emergency.

Note: Emergency Contact information may be updated by employees via Self Service if allowed by your institution.

## Banner form

![Emergency Contact Form Screenshot]
Steps

Follow these steps to enter emergency contact information.

1. Access the Emergency Contact tab.

2. Enter a number in the **Priority** field to specify the order of contact priority.

   Note: Even if you only have one emergency contact, you must enter a “1”. When adding others, add the change with the next available priority number, save, then go back and renumber without saving until you have changed all that is needed.

3. Enter the contact person’s last name in the **Contact Last Name** field.

4. Enter the contact person’s first name in the **First** field.

5. Optional - enter the contact person’s middle initial in the **Mi** field.

6. Double-click in the **Relationship** field and select and return a Relationship code.

7. Optional - Double-click in the **Address Type** field and return EM (Emergency Contact) from the Address Type Validation form.

8. Optional - Enter the contact person’s address in the **Address** field. Enter at least one address.

9. Optional - Enter the contact person’s city in the **City** field.

10. Optional - Double-click in the **State/Province** field and select and return a State/Province code.

11. Optional - Enter the contact person’s zip code in the **ZIP/Postal Code** field.

12. Optional - Enter “157” in the **Nation** field for the United States of America.

   Note: You can also click the drop-down list in the **Nation** field and select a Nation code.

13. Enter the contact person’s phone number in the **Phone** field.

14. Click the **Save** icon.
15. Complete the process.

<table>
<thead>
<tr>
<th>IF you want to...</th>
<th>THEN...</th>
</tr>
</thead>
<tbody>
<tr>
<td>review the new record and add more information</td>
<td>select the desired tab.</td>
</tr>
<tr>
<td>add another new employee</td>
<td>click the <strong>Generate ID</strong> icon.</td>
</tr>
<tr>
<td>assign a job to this new employee</td>
<td>exit this form and access the New Hire Form (PEAHIRE). See section C for details.</td>
</tr>
<tr>
<td>exit this form</td>
<td>click the <strong>X (Close)</strong> icon.</td>
</tr>
</tbody>
</table>
Entering General Information

Introduction

The General Information Form (PPAGENL) captures person or employee general qualifications normally submitted by an applicant, including education, experience, examination results, and publications. You can easily access this form using the Options menu on the Person Identification form.

Note: PPAGENL is closely affiliated with Applicant Tracking and matching applicants to position vacancies through the Process Submission Control form (PARMAPP). You can track official transcripts on this form, which is a shared function of the Student System via Faculty Degree Information Form, SIAFDEG. The assignment of this responsibility should be decided during implementation.

Banner form
Steps

Follow these steps to enter general education information.

1. Access the General Information Form (PPAGENL).

2. Enter your person’s ID in the ID field or click the Search icon.

3. Perform a Next Block icon.

4. Select the SBGI Code Search icon and select the person’s Institution.
   
   Note: The SBGI code is user-defined and enables you to identify educational institutions.

5. Click the Save icon.

6. Perform a Next Block icon.

7. Double-click in the Code field and select and return a Degree Code.

8. Enter the person’s Grade Point Average in the GPA field.

9. If necessary, enter the number of hours in the Hours field.

10. Enter the dates that the person attended the institution in the Dates of Attendance fields.

11. Enter the person’s graduation date in the Date of Graduation field.

12. Click the Terminal Degree checkbox.

   Note: When you check the Terminal Degree field, this information will display in Faculty Tracking (PEAFACT).

13. Use the down arrow to enter more degree information if this employee has multiple degrees with this institution.

14. Click the Save icon.
15. Perform a **Next Block** icon.

16. Double-click in the **Major** field and select and return a Major, Minor, Concentration code.

17. Double-click in the **Minor** field and select and return a Major, Minor, Concentration code.

18. Double-click in the **Concentration** field and select and return a Major, Minor, Concentration code.

19. Click the **Save** icon.
Examinations tab

The **Examinations** tab is used to capture information about formal exams for minimum qualifications such as a CPA, State Bar, Medical licenses, and any other professional certification or licensing exams. It may also be used for an institution's internal exams. The examination codes are entered on the Exam Code Rules Form (PTREXAM).

**Steps**

Follow these steps to enter examination information.

1. Select the **Examination** tab.
2. Select the **Examination Code** Search icon and select a valid Examination code.
3. Enter the date of the exam in the **Exam Date** field.
4. Enter the test score in the **Score** field.
5. Enter the test score percentage in the **Percent** field.
6. In the **Pass?** Field, *Pass or Fail* is defaulted but can be overridden.
7. Click the **Save** icon.
Publications tab

The **Publications** tab is used to enter faculty publications.

### Steps

Follow these steps to enter publication information.

1. Select the **Publication** tab.
2. Double-click the **Type** field and select a Publication Code.
3. Enter the title of the published work in the **Title** field.
4. Enter the name of the publisher in the **Publisher** field.
5. Enter the Issue name in the **Publication Issue** field.
6. Enter the Volume name in the **Publication Volume** field.
7. Enter the pages numbers of the publication in the **Pages** field.
8. Enter the date in the **Publication Date** field.
9. Click the **Save** icon.
Driver's License tab

Steps

Follow these steps to enter driver's license information.

1. Select the **Driver's License** tab.

2. Enter the Driver's License Number (up to 20 characters) in the **License Number** field.

3. (optional) Double-click in the **Type** field, and select a skill code.

4. Select a status code from the drop-down menu in the **Status** field.

   Note: Banner defaults to C-Current but you can also select among the following status options: E-Expired, S-Suspended, I-In Process.

5. Enter the date the license became effective in the **Issue Date** field.

   Note: This is a required field that will not accept a null value. Any null values will default to 01-Jan-4712 B.C. (earliest possible date in Oracle).

6. Enter the date the license expires in the **Expiration Date** field.

7. Double-click the **State/Province** field and select and return a State/Province code.

8. Double-click in the **Nation** field and select and return a Nation code.

9. Click the **Save** icon.
Honors and Awards tab

Follow these steps to enter honor and award information.

1. Select the **Honors and Awards** tab.

2. Enter a title to describe the honors and award given in the **Honors/ Award Title** field.

3. Enter the organization that gave the award in the **Awarding Organization** field.

4. Enter the date the award was issued in the **Date Awarded** field.

5. Optional - enter the date the award expires in the **Date Expired** field.

6. Click the **Save** icon.
Transcript tab

The Office of the Registrar uses the information on the Transcript tab.

Steps

Follow these steps to enter transcript information.

1. Select the Transcript tab.

2. Click the Official Transcript box if this is an official transcript.

3. Enter the date that the transcript was received in the Date of Receipt field.

4. Enter the date that the transcript was reviewed in the Date of Review field.

5. Click the Save icon.

6. Click the Exit icon.
# Entering Certification Information (Phase II Training)

## Introduction

The Certification Information Form (PPACERT) collects data on applicant/employee certifications and endorsements. The certification codes are pulled from PTRCERT. You can also use this form to track both formal certifications and completion of internal education programs. The Pending Action Report will list upcoming expirations of these certifications.

## Banner form

![Banner form](image)

<table>
<thead>
<tr>
<th>Certification Code</th>
<th>Certification Number</th>
<th>Certification Date</th>
<th>Next Certification Date</th>
<th>Expiration Date</th>
<th>License or Certification Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Certification Code: 

Endorsement Code: 

Endorsement Date: 

Legend: 

- [ ] }
Steps

Follow these steps to enter certificate information.

1. Access the Certification Information Form (PPACERT).

2. Enter your person’s ID in the ID field or click the Search icon.

3. Perform a Next Block icon.

4. Select the Certification Code Search icon and select a code from the Certification Code Rule Form (PTRCERT).

5. Enter the license/certification number in the Certification Number field.

6. Enter the date that your person was certified in the Certification Date field.

7. Enter the next date that the person will be certified in the Next Certification Date field.

8. Enter the date that the certification will expire in the Expire Date field.

9. Double-click in the Status field and select and return a License/Certification Status Validation Form (PTVLCVS).

10. Double-click in the State/Province field and select and return the issuing State code from the State/Province Code Validation Form (STVSTAT).

11. Double-click in the Nation/Country field and select and return the issuing Nation code from the Nation Validation Form (STVNATN).

12. Perform a Next Block icon.

13. Double-click the Endorsements Code field and select and return an Endorsement code.

14. Enter the date of the endorsement in the Endorsement Date field.

15. Click the Save icon.
Options – Comments

Steps

Follow these steps to add comments.

1. Select Comments from the Options menu.
2. Enter any free form comments (up to 2000 characters) in the Comments field.
3. Click the Save icon.
4. Click the Exit icon.
Entering Person Experience Information

Introduction

The Person Experience Form (PPAEXPR) maintains records on an applicant's experience and references. This form may not be required if your institution has resume imaging software.

Form will be attached via BDMS once that functionality is received.

Banner form
Steps

Follow these steps to enter person experience information.

1. Access the Person Experience Form (PPAEXPR).

2. Enter your new person’s ID in the ID field or click the Search icon.

3. Perform a Next Block icon.

4. Enter data in the following fields within the Experience Information section: Employer Name, State/Prov, Nation, Start Date, End, Empr/Exp Type (click the Search icon to view the List of Values), and Reason for Leaving.

5. Enter data in the following fields within the Job Duties section: Job Title, Job Duties, and # of Employees Supervised.

6. Enter data in the following fields within the Supervisory Information section: Name, Phone Number, OK to Contact.

7. Enter data in the following fields within the Salary Information section: Current Ending Salary, Current Ending Rate, Comments.

8. Click the Save icon.
Options – Applicant’s Reference

Steps

Follow these steps to enter applicant reference information.

1. Select Applicant’s References from Options menu.
2. Enter the name of the reference in the Name field.
3. Enter the phone number of the reference in the Phone/Ext field.
4. Enter any comments that require notation in the Comments field.
5. Click the Save icon.
6. Click the Exit icon.
Entering International Information

Introduction

The International Information Form (GOAINTL) allows you to enter visa and nationality data for citizens of countries other than the one in which your institution is located.

Banner form

Steps

Follow these steps to enter visa information.

1. Access the International Information Form (GOAINTL).

2. Enter your person’s ID in the ID field or click the Search icon.

3. Perform a Next Block icon.

4. Double-click in the Visa Type Code field and select the valid Visa Type.

5. Enter the Visa number in the Visa Number field.
6. Double-click in the **Nation of Issue** field and select the appropriate country.
7. Double-click in the **Issuing Authority** field and select the appropriate authority.
8. Double-click in the **Port of Entry** field and select the appropriate port of entry.
9. Perform a **Next Block** icon.
10. Double-click in the **Document** field, and select the appropriate document.
11. Double-click in the **Source** field and select the appropriate source.
12. Click the **Save** icon.

**Passport tab**

Follow these steps to enter passport information.

1. Select the **Passport** tab.
2. Enter the Passport number in the **Number** field.
3. Double-click in the **Nation of Issue** field and select the country.
4. Enter the date that the passport will expire in the **Expiration Date** field.
5. Enter a three-character code denoting the status in the **Status** field.
6. Enter the expiration date of the admission/departure in the **Expiration Date** field.
7. Enter the registration number in the **Alien Registration Number** field.
8. Click the **Duration of Stay** checkbox if the visa is for the duration of the stay.

9. Click the **Save** icon.

**Certification of Eligibility tab**

Follow these steps to enter certification information.

1. Select the **Certification of Eligibility** tab.

2. Double-click in the **Certification Code** field and select the appropriate certification of eligibility code.

3. Enter the certification number in the **Number** field.

4. Enter the date that the certification was issued in the **Issue Date** field.

5. Enter the date that the certification was received in the **Receipt Date** field.

6. Double-click in the **Admission Request** field and select the appropriate admission request code.

7. Click the **Save** icon.
Nationality tab

Steps

Follow these steps to enter nationality information.

1. Select the **Nationality** tab.

2. Double-click in the **Nation of Birth** field and select the country where the person was born.

3. Double-click in the **Nation of Citizenship** field and select the country where the person is a citizen.

4. Double-click in the **Native Language** field and select the person’s native language.

5. Double-click in the **Sponsor** field and select the sponsoring organization.

6. Double-click in the **Employment Type** field and select the type of employment.

7. Enter the foreign tax ID number in the **Foreign Tax ID** field.

8. Select **Not Reported**, **Yes**, or **No** from the drop-down list in the **Spouse Accompanying Person to County** field.

9. Enter the number of children that are accompanying the person in the **Number of Children Accompanying Person** field.

10. Select **Not Reported**, **Yes**, or **No** from the drop-down list in the **Signature of Availability of Funds** field.

11. Click the **Save** icon.
12. Click the **Exit** icon.
Entering E-mail Information

Introduction

The E-mail Address Form (GOAEMAL) displays and maintains e-mail addresses for any person who has an ID in your database. Employees can access their information from this form online when using the Employees Self Service product.

Note: You can enter a person’s e-mail address on PPAIDEN when you set them up initially. This form is useful when you need to update an e-mail address.

Banner form
Steps

Follow these steps to enter e-mail address information.

1. Access the E-mail Address Form (GOAEMAL).
2. Enter your person’s ID in the ID field or click the Search icon.
3. Perform a **Next Block** icon.
4. Double-click the **E-mail Type** field and select and return an E-mail Type code.
5. Enter the person’s email address in the **E-mail Address** field.
6. Check the **Preferred** checkbox if this is the person’s preferred e-mail address.
   
   Note: Only one e-mail address can be selected as preferred. If a preferred address becomes inactive, the preferred status is removed.
7. Tab over the **Inactive** field.
8. Click the **Display on Web** checkbox if you want the person’s e-mail address to appear on the web.
9. Enter any comments about this e-mail address in the **Comments** field.
10. Click the **Save** icon.
11. Click the **Exit** icon.
Entering Comments Information – this form will be used for Centralized Payroll only

Introduction

The Comment Form (PPACMNT) enables you to enter comments about a person and to track and comment upon specific employee or applicant situations. Some examples would be: grievances, accidents, or committee memberships. Payroll uses this form for garnishments. You can also copy and paste text into the free form comments field.

Note: We suggest that free form comments be initialed and dated.

Banner form
Steps

Follow these steps to enter comments.

1. Access the Comment Form (PPACMNT).
2. Enter your new person’s ID in the ID field or click the Search icon.
3. Perform a Next Block icon.
4. Double-click the Code field and select a Comment Type.
5. Enter a free-form comment in the Comment field (up to sixty characters).
6. Enter additional text into the Free Form Comments field.
7. Click the Save icon.
8. Click the Exit icon.
Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

When is the SSN/SIN/TFN field on PPAIDEN required?

a) Before the person is defined on the system
b) When the person is being defined in the system as an employee
c) The SSN/SIN/TFN is not required on PPAIDEN
d) When the person is being defined in the system as a person

Question 2

Which fields are required in PPAIDEN when a person is being defined as an employee?

a) Birth date, ethnicity, last name, gender, and address
b) Birth date, ethnicity, first name, last name, SSN, address, citizenship code and gender
c) Birth date, first name, last name, SSN, address, and gender
d) Birth date first name, last name, SSN, and gender
**Question 3**

It is after hours and someone needs to reach Professor Anderson. They are requesting her home phone number. How do you determine if Professor Anderson will allow this number to be released, without calling her?

**Question 4**

Match the following forms to their description:

a) PPACMNT _______ Certification Information Form  
b) PPAEXPR _______ Person Experience Form  
c) PPAGENL _______ Mail Form  
d) PPACERT _______ Comment Form  
e) PPAIDEN _______ E-mail Address Form  
f) PUAMAIL _______ General Information Form  
g) GOAEMAL _______ Person Identification Form
Answer Key

Question 1

When is the SSN/SIN/TFN field on PPAIDEN required?

a) Before the person is defined on the system

b) When the person is being defined in the system as an employee

c) The SSN/SIN/TFN is not required on PPAIDEN

d) When the person is being defined in the system as a person

Question 2

Which fields are required in PPAIDEN when a person is being defined as an employee?

a) Birth date, ethnicity, last name, gender, and address

b) Birth date, ethnicity, first name, last name, SSN, address, citizenship code and gender

c) Birth date, first name, last name, SSN, address, and gender

d) Birth date first name, last name, SSN, and gender
Question 3

It is after hours and someone needs to reach Professor Anderson. They are requesting her home phone number. How do you determine if Professor Anderson will allow this number to be released, without calling her?

Biographical tab of PPAIDEN.

Question 4

Match the following forms to their description:

a) PPACMNT  ____D____ Certification Information Form
b) PPAEXPR  ____B____ Person Experience Form
c) PPAGENL  ____F____ Mail Form
d) PPACERT  ____A____ Comment Form
e) PPAIDEN  ____G____ E-mail Address Form
f) PUAMAIL  ____C____ General Information Form
g) GOAEMAL  ____E____ Person Identification Form
Creating and Maintaining Employee Records

Section goal

The goal of this section is to explain the procedures for maintaining employee records in Banner Human Resources.

Section objectives

In this section you will learn how to

• establish an employee record
• record employee information
• assign an employee to a job
• collect employee review information
• enter leave of balance information
• enter leave balance information
• enter hiring location information
• enter US regulatory information
• track faculty
• change an employee’s status
• query job records
• enter termination information.
Establishing an Employee Record

Introduction

The New Hire Form (PEAHIRE) provides a simple, efficient method to establish an employee in the system. The form utilizes the default functionality with Banner HR and requires only a minimum amount of data to be entered. All information entered on this form will automatically be entered in the Person Identification Form (PPAIDEN), the Employee Form (PEAEMPL), and the Employee Job Form (NBAJOBS).

PEAHIRE provides a method to enter records for new employees. It does not allow maintenance of existing employee records. All maintenance must be performed on the appropriate application form (PPAIDEN, PEAEMPL, NBAJOBS, PDADEDN, or PEAESCH).

Note: A new indicator has been added to the New Hire Form (PEAHIRE) to display the new hire enrollment indicator. This indicator is automatically enabled to support New Hire enrollment of Benefits in Self-Service.

When to Use PEAHIRE

The PEAHIRE form can be used only for new employees. It cannot be used for current employees, previously terminated employees, or deceased employees.

If a Person Identification Form (PPAIDEN) was previously completed for the employee, any information on the associated employee record is displayed in the corresponding fields of PEAHIRE. This information is display only on PEAHIRE. Any updates to this data must be made on PPAIDEN.

<table>
<thead>
<tr>
<th>IF you want to...</th>
<th>THEN use...</th>
</tr>
</thead>
<tbody>
<tr>
<td>set up a new employee with <em>minimal</em> personal information and link to a job <em>immediately</em>.</td>
<td>PEAHIRE</td>
</tr>
<tr>
<td>set up a new employee with <em>detailed</em> personal information and link to a job <em>later</em>.</td>
<td>PPAIDEN</td>
</tr>
<tr>
<td>update information about a person.</td>
<td>PPAIDEN</td>
</tr>
</tbody>
</table>

Note: You can use the PEAHIRE form to link a person to a job without having to re-enter data submitted through PPAIDEN.
PEAHIRE Process Overview

When using PEAHIRE to set up a new employee in Banner, you will be prompted to enter the following information:

- new person record information
- biographical information
- address and telephone information
- employee information
- job information.

If you have already entered information in PPAIDEN, then use the Search icon to access the person you want to link to a job. Review information previously entered and click the Next Block icon until you are able to enter the employee information.

All null fields on PEAHIRE must be completed as described below. If you are creating a new record (that is, if a PPAIDEN form was not completed for the employee), all fields on PEAHIRE will be null and must be completed as described on the next page.

Note: The Edit functionality that required a value in the existing Ethnicity field has been removed since that field is no longer required.

Banner form
Steps

Follow these steps to set up a new hire.

Note: The following steps assume that Common Matching is turned on.

1. Access the New Hire Form (PEAHIRE).

2. Click the Generate ID icon.

3. When you click the Generate ID icon, a more detailed form will open so that you can enter information about the new employee. The word “Generated” defaults to the ID field. This does not change until the record is Saved.

4. Click the Matching Source drop-down arrow and select a source.

5. Enter the person’s last name in the Last Name field.

   Note: As per the institution’s data standards, enter the Last Name exactly as it appears on the Social Security Card for payroll purposes.

6. Enter the person’s first name in the First Name field.

7. Optional - enter the person’s middle name in the Middle Name field.

8. Click the Address Type Search icon and select the code identifying the type of address.

   Note: Banner defaults to the home address.

9. Enter the employee’s address in the Address field.

   Note: Address Line 1 is required.

10. Enter the city associated with the address in the City field.

11. Click the State or Province Search icon and select the state or province code.

12. Enter the zip code in the ZIP or Postal Code field.

   Note: You may also double-click the ZIP or Postal Code field and select the zip/postal code associated with the address. A search function is available.
13. Click the **Parish/County** Search icon and select and return the county associated with the address.

14. Click the **Nation** Search icon and select a nation.

   Note: You can also double-click the **Nation** field and select the country code associated with the address. This is only required if the State/Province field is not complete.

15. Enter the employee’s social security number in the **SSN/SFN/TFN** field.

16. Enter the employee’s date of birth in the **Birth Date** fields.

   Warning: The fields appear in Day/Month/Year order. Be careful to enter the day prior to the month.

17. Select the employee’s gender in the **Gender** field.

18. Click the **E-mail Type** Search icon and select an e-mail type code.

19. Enter the person’s email address in the **E-mail** field.

20. Click the **Telephone Type** Search icon and select a telephone type.

21. Enter the employee’s phone number in the **Area Code/Phone Number/Extension** field.

22. Click the **Duplicate Check** icon.

23. Click **Yes** to create a new record.

24. Click **OK**.
Biographic and Demographic screen

Follow these steps to enter biographic and demographic information.

1. Click the **Next Block** icon.
   
   Note: Information entered during the matching process will default into pertinent fields.

2. DO NOT ENTER the prefix associated with the employee’s name in the **Prefix** field (i.e. Mr., Mrs., Dr.)

3. DO NOT ENTER Click the **Name Type** drop-down arrow and select a name type code.

4. Enter the birthdate in the **Birthdate** field, if not previously entered.

5. Click the **Gender** drop-down arrow and select a code, if not previously entered.

6. Click the **Citizenship** drop-down arrow and select a citizenship code.

7. DO NOT USE Click the **Ethnicity** drop-down arrow and select an ethnic code.
8. Select appropriate value in the **New Ethnicity** field.

9. Click the **Ethnicity and Race Confirmed** checkbox if it applies.

10. Enter a confirm date in the **Confirm Date** field.

11. Click the **Next Block** icon.

12. Click the **Race** Search icon and select the appropriate race.

### Address and Telephone screen

![Address and Telephone screen](image)

#### Steps

Follow these steps to enter employee address information.

13. Click the **Next Block** icon or tab to continue.

14. Enter in the employee’s address, if not previously entered.
Steps

Follow these steps to enter job information.

15. Click the **Next Block** icon.

16. Click the **Employee Class** Search icon and select the appropriate one.

17. Enter the appropriate date in **Original Hire Date** field.

18. Enter L in the **Home Department COA**.

19. Click the **Organization** Search icon and select the appropriate organization.

20. The **Benefit Category** field will populate automatically from the employee class. If you need to override the category, double click in the **Benefit Category** field and select the appropriate code.

21. Click the **Allow New Hire Benefit Enrollment** checkbox to allow the new employee to sign up for benefits through Self-Service.

22. Click the **Next Block** icon.

23. Click the **Position** Search icon and select the available positions.
24. Enter the suffix number in the **Suffix** field.

**Suffix Schema**

<table>
<thead>
<tr>
<th>Description</th>
<th>Suffix</th>
</tr>
</thead>
<tbody>
<tr>
<td>FT faculty and staff</td>
<td>=00</td>
</tr>
<tr>
<td>FT faculty and staff that have multiple assignments</td>
<td>=02, etc...</td>
</tr>
<tr>
<td>FT 9ME/20 pay faculty</td>
<td>=20</td>
</tr>
<tr>
<td>FT 9ME/20 faculty that have multiple assignments</td>
<td>=21, 22, etc...</td>
</tr>
<tr>
<td>FT9ME/26 pay faculty</td>
<td>=26</td>
</tr>
<tr>
<td>FT9ME/26 pay faculty that have multiple assignment</td>
<td>=27, 28, etc...</td>
</tr>
<tr>
<td>Part-Time “non faculty” assignment</td>
<td>=30</td>
</tr>
<tr>
<td>Part-Time “faculty” assignment</td>
<td>=40</td>
</tr>
<tr>
<td>Students assignment</td>
<td>=01</td>
</tr>
</tbody>
</table>

25. Verify the title.

Note: The title in the **Title** field will be displayed based on the position number. The only acceptable place to override the Business/Working title is on NBAJ OBS (the assignment).

26. Enter the date the job is starting in the **Begin Date**.

27. Click the **Job Type** drop-down arrow and select primary. Note if the employee is a first time hire and hired through PEAHIRE the Job Type should always be primary.

28. Click the **Deferred Pay** checkbox if this job will be on a deferred pay cycle.

29. Ensure Step 0 auto populates.

30. If field does not automatically populate, enter the hourly rate if the job is hourly in the **Hourly Rate** field.

31. If field does not automatically populate, enter the annual salary if the job is salary in the **Annual Salary** field.

32. Enter the appropriate job change reason in the **Change Reason** field.

Note: For this exercise it would be *NEW*, or the code that your school has created.

33. Click the **Save** icon.

Notes: After clicking the **Save** icon, the system will call each of the related application forms, insert the data you have entered into the associated fields, and
place default values into the remaining fields.

34. When the **Save** process is complete, the Auto/Hint will display *New Hire Process Complete*. At this point, all of the selections on the Options menu are enabled.
Recording Employee Information

Introduction

The Employee Form (PEAEMPL) is used to establish information about an employee’s terms of employment. The information collected includes current status, employee class, leave and benefit categories, home and distribution organizations, and service dates.

The Employee Form must be completed before assigning a position to the employee on NBAJ OBS.

Banner form
Steps

Follow these steps to enter employee information.

1. Access the Employee Form (PEAEMPL).

2. Click the ID Search icon to access the List for Person Form, SOAIDEN, and select the employee.

3. Click the Next Block icon.

4. Note: The General Employee Information block maintains data about the employee’s employment, and will support only one set of information per person. If no information displays for the employee, the employee must be added to the system.

5. Click the Employee Status drop-down arrow and select the appropriate employee status.

6. Note: An employee’s status can be changed. The status of the employee will determine the benefits and type of compensation he receives. If the status is being changed to Terminated or to a Leave status, a reason must be recorded and the date when the change began must be entered. If an employee is on a leave of absence, you can change the job information instead of the employee information.

7. Click the Employee Class Search icon and select employee class from the Employee Class Query Form. See appendix for the Employee Class list.

8. Note: The Employee Class is the employee group to which the employee belongs and is the most important field on PEAEMPL. Most higher education enterprises establish between twelve (12) and eighteen (18) employee classes to suit their needs.

9. The values in the Employee Group, Leave Category, and Benefit Category fields default based on the Employee Class selected, but may be overridden. Double-click the field to select another value.

10. The value in the Part or Full Time Status field defaults based on the Employee Class selected, but may be overridden. Click the drop-down arrow to select another value.

11. Click the Allow New Hire Benefits Enrollment checkbox to allow new hire to enroll in benefits via Employee Self-Service.
12. Enter L as the **Home Department COA**.

13. Note: If Banner Finance is installed, the chart of accounts must exist on this table. The code, description status, effective date, and termination date are listed on this chart.

14. Click the **Home Department Organization Code** Search icon to select and return an organization code from the Organization Code Validation Form (FTVORGN).

15. The **Check Distribution COA** and **Organization** fields indicate the COA (Chart of Accounts) and organization code to which this employee's check is distributed. Enter L.

16. Click the **District or Division** Search icon and select a district or division code from (GTVDI CD). This will be the College, Board Office or LCTCSONline.

17. Click the **Save** icon.

   Note: To view your employee's history, access the Employee History Form, PEI.EHIS.
Assigning an Employee to a Job

Introduction

The Employee Jobs Form (NBAJOBS) is used to assign a job to the new employee using the new person record and new position and position class in the system. You can use the tabs to access many options, such as the Job Detail tab.

Note: The IPEDS reporting indicator appears on NBAJOBS when the Location field on the Installation Rules Form (NTRINST) is set to United States.

The IPEDS Reporting Indicator, when checked, means the job identified is IPEDS reportable. This indicator allows more than one job to be reportable on the IPEDS Detail Report (PEREO6D) and the IPEDS Summary/Extract Report (PEREO61,-2).

Banner form
Steps

Follow these steps to assign an employee to a job.

Note: See Appendix for Special Process Notes for Adjunct Faculty Assignments Access the Employee Jobs Form (NBAJOBS).

1. Click the **ID** Search icon and select the employee on the Employee Search Form, POIIDEN.

2. Click the **Position** Search icon and select the appropriate position for the Position List.

3. Note: Use the vertical scroll bar to move through the records.

4. Enter **00** or appropriate suffix based on LCTCS suffix schema in the **Suffix** field.

**Suffix Schema to Aid in Reporting**

<table>
<thead>
<tr>
<th>Description</th>
<th>Suffix</th>
</tr>
</thead>
<tbody>
<tr>
<td>FT faculty and staff</td>
<td>=00</td>
</tr>
<tr>
<td>FT faculty and staff that have multiple assignments</td>
<td>=02, 03, etc...</td>
</tr>
<tr>
<td>FT 9ME/20 pay faculty</td>
<td>=20</td>
</tr>
<tr>
<td>FT 9ME/20 faculty that have multiple assignments</td>
<td>=21, 22, etc...</td>
</tr>
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<td>=27, 28, etc...</td>
</tr>
<tr>
<td>Part-Time “non faculty” assignment</td>
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</tr>
<tr>
<td>Part-Time “faculty” assignment</td>
<td>=40</td>
</tr>
<tr>
<td>Students assignment</td>
<td>=01</td>
</tr>
</tbody>
</table>

5. Note: The **Query Date** field will default to the system date.

6. Click the **Next Block** icon.

7. Enter the date that the employee begins this job in the **Begin Date** field.

8. The system defaults to **Primary** in the **Job Type** field.

9. Note: The drop-down list presents three possible categories of job type:
Primary, Secondary, and Overload. Only one primary job is allowed per employee, but he/she may have multiple secondary or overload jobs.

10. Click the **IPEDS Reporting Indicator** checkbox if IPEDS reporting is required. For Category 6 positions (unreported to IPEDS), do not check this field for positions with the following Employee Class Codes:
   - 50 – SWCOLLH
   - 51 – SWFWSH
   - 52 – SWFICAH
   - 90 – PERDIEMS
   - EX – EXSERVH
   - ES – EXSERVS
   - OV – OVRLOADS
   - DC – DEFAULT

11. Note: This field maybe automatically populated

12. The Chart of Accounts code in the **COA** field will default to L.

13. Review that the **Accrue Leave** checkbox is auto checked.

14. If a civil service position, click the **Civil Service** checkbox.

15. Enter the number of probation units if the employee is on probation in the **Probationary Period** field.

   Note: This is measured in months.

16. Enter the date that the probation begins if the employee is on probation in the **Probationary Begin Date** field.

17. Enter the date the probation will end if the employee is on probation in the **Probationary End Date** field.

18. **This will be Phase 2.** Enter the encumbrance hours in the **Total Encumbrance Hours** field.

   Note: Only enter if the job uses the Hours Input method, as displayed on the Job Detail tab.

19. **This will be Phase 2.** Enter the date that the employee started the contract time in the **Contract Start** field.

20. **This will be Phase 2.** Enter the date that the employee will end the contracting in the **Contract End** field.

21. **This will be Phase 2.** Enter the employee contracted hours in the **Total Contract Hours** field.

   Note: The Salary Encumbrance and Fringe Encumbrance are display only. This
information is taken from the FRMFUND and FTVFUND form. More information can be obtained from the Multi-Year Encumbering Workbook.

22. Click the Save icon.

Job Detail Information

Steps

Follow these steps to enter job detail information.

1. Click the Job Detail tab.

Note: Employee job assignments are recorded in this window. The window has repeating blocks to record multiple jobs by the effective date of each job. The window displays the most recent job assignment that has an effective date less than or equal to the query date in the Key block.

2. The begin date defaults to the Effective Date field.

3. Enter the date that the job became officially effective in the Personnel Date field.

4. The Status field displays the current status of the job.

5. The Title field defaults from the Position Definition Form (NBAPOSN) but can be overridden. The only acceptable place for the Business/Working title to be overridden is on NBAJOBS (the assignment).

6. Enter 1 for a full-time employee; enter .5 or .25 for part-time employees in the...
7. The percentage of full-time appointment to a position defaults from the position record in the Appointment % field. Always leave at 100%.

8. Note: The percentage cannot exceed 100%.

9. If using hours encumbrance method as displayed in the Encumbrance Indicator field, enter the encumbrance hours in the Encumbrance Hrs field.

10. The Encumbrance Ind field will default.

11. In the Hours per Day field, the value defaults from the Employee Class Rule Form (PTRECLS) but may be overridden.

12. In the Employee Class field, the value defaults from the Position Definition Form (NBAPOSN).

13. Click the Change Reasons Search icon and select a change reason.

14. The Employer Code field will default. There is only one Employer Code.

   Note: Compensation fields will default information from the Position, but the user may need to change them. See form and on Line Help for more information.

15. Click the Save icon.

16. Click the Exit icon.

17. Note: In the Compensation information area of the block, the pay period salary is represented. For hourly employees, this is a calculated rate, based on the hours per pay established at the employee class level.
Collecting Employee Review Information

Introduction

The Employee Review Form (PEAREVW) collects data about a specified employee’s performance reviews. Information you can enter includes review type, date due, completion status, rating, and reviewer data. You can also add comments at the bottom of the screen.

Banner form

Documents will be attached via BDMS once that functionality is implemented.
Steps

Follow these steps to enter employee review information.

1. Access the Employee Review Form (PEAREVW).

2. Click the **ID** Search icon and select the employee on the Employee Search Form, POIIDEN.

3. Click the **Next Block** icon.

4. Click the **Review Type** Search icon and select a review type from the Review Type Validation Form, PTVREVT.

5. Enter the date that the employee’s review is due in the **Date Due** field.

6. Click the **Completed** checkbox to indicate the review has been completed, if applicable.

   Note: Enter the date that the employee’s review was completed in the **Completed Date** field.

7. Enter the code from your user-defined rating system in the **Rating** field.

8. Click the **Reviewer ID** Search icon and select the reviewer’s ID from the Employee Search Form, POIIDEN.

9. Enter detailed free-form comments regarding the review (200 + lines) in the **Comments** field.

10. Click the **Save** icon.

11. Click the **Exit** icon.
Entering Termination/Leave of Absence Information

Introduction

The Employee Form (PEAEMPL) is used to enter an employee's termination or leave of absence information.

Banner form

[Image of Banner form]

- Employee Status: [Active]
- Employee Class: [Permanent Full-time Faculty]
- Leave Category: [Faculty]
- Benefit Category: [Full Time Employees]
- Part or Full Time Status: [Full Time]
- Allow New Hire Benefits Enrollment: [No]
- Home Department: [COA]
- Check Distribution: [Office]
- District or Division: [Office]
- Service Dates:
  - Current Hire: [01-JAN-2005]
  - Original Hire: [01-JAN-2005]
  - Adjusted Service: [01-JAN-2005]
  - Seniority: [01-JAN-2005]
  - First Work Date: [01-MAR-2005]
  - Last Work Date: [DATE]
- Termination:
  - Reason: [ENTER REASON]
  - Termination Date: [DATE]
- Leave of Absence:
  - Reason: [ENTER REASON]
  - Begin Date: [DATE]
  - End Date: [DATE]
- Hiring Location:
  - Location: [ENTER LOCATION]
  - College: [ENTER COLLEGE]
  - Campus: [ENTER CAMPUS]
**Steps**

Follow these steps to enter the person’s leave of absence information.

1. Access the Employee Form (PEAEMPL).
2. Click the **ID** Search icon and select the employee ID from the Employee Search Form (POIIDEN).
3. Click the **Next Block** icon.
4. Enter the date the termination becomes effective in the **Termination Date** field or the length of the leave of absence in the **Begin Date** and **End Date** fields.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Note: In the case of either a leave or termination, Banner will automatically change the employee's status on the day the leave or termination takes effect.
View Leave Balance Information

Introduction

The Employee Form (PEAEMPL) is used to enter an employee’s leave balance information.

Banner form

Steps

Follow these steps to enter the person’s leave balance information.

1. Access the Employee Form (PEAEMPL).

2. Click the ID Search icon and select the employee ID from the Employee Search Form (POIIDEN).

3. Click the Next Block icon.

4. Select Leave Balance from the Options menu.

Notes: The values on this form default from the Leave Codes assigned to the
Leave Category code entered on the employee record on the first window of this form.

5. Review the **Leave Code** that displays.
   
   Note: Displays the leave code for which the leave balance is being displayed.

6. The **Day or Hour** field defaults from the Leave Category as defined on PTVLCAT.

7. Total **Begin Balance** displays the employee’s total begin balance for the leave code.
   
   Note: Employees can accrue leave against leave codes that are common to two or more job’s leave categories. In this case, this field represents the sum of the Total Begin Balance against that leave code for each job.

8. Total **Accrued** displays the employee’s total leave accrued for the leave code during the current year.
   
   Note: Employees can accrue leave against leave codes that are common to two or more job’s leave categories. In this case, this field represents the sum of the leave accrued against that leave code for each job.

9. Total **Taken** displays the total amount of leave taken by the employee during the current year.
   
   Note: Employees employed in more than one capacity can be associated with more than one leave category

10. **Current Available** displays the amount of leave currently available in each leave code.
    
    Note: Employees employed in more than one capacity can be associated with more than one leave category and/or job. Consequently, they may accrue leave against leave codes that are common to leave categories across jobs. In this case, this field can represent the sum of the leave currently available for that leave code for all jobs.

11. Total **Banked** displays the amount of leave banked for a particular leave code by the employee.
    
    Note: This field should always be 0

12. The **Change Reason** field displays the reason for any manual adjustments entered on this form.
13. Click the **Save** icon.

Note: PEALEAV is normally updated automatically via payroll processing or the web-based leave report method, based on the rules set up in PTRLCAT. It is not necessary for you to update or adjust the leave balances manually during normal operations; however, using the Steps outlined above will allow you to make corrections as necessary, such as when payroll adjustments are performed.
Entering US Regulatory Information

Introduction

The Employee Form (PEAEMPL) is used to enter an employee’s regulatory information.

Banner form

Steps

Follow these steps to enter regulatory information for the United States.

1. Click the United States Regulatory tab.


3. Click the FLSA Indicator drop-down arrow and select a category - Cash,
Accrual, or None. Don’t touch this field, it will default.

4. Click the **Work Period** Search icon and select the work period from the Work Period Form (PTRWKPR). Not using.

5. Click the **Form Indicator** drop-down list and select a value - Received, Not Received, Temporary, Exempt, and None.

6. Note: The field is used to verify the employment eligibility status of newly-hired employees. If I-9 information is entered on the employee record, this field must be filled out. Use to record if I-9 is submitted.

7. The **Date** field will default to the current date upon entry of the **I-9 Form Indicator** but may be overridden.

8. The **Expire** field is the date immigration information expires. It must be entered if the I-9 indicator is Temporary.

9. In the **Social Security Name section**, enter the employee’s name as shown on their Social Security card. This is used for W-2 processing. If blank, the name entered on PPAIDEN will be used.

10. Click the **1042S Information** drop-down arrow and select the type of person or organization that is receiving the 1042 statement.

11. In the **IPEDS section**, click the **IPEDS Primary Function** drop-down arrow and select the function that applies to this employee.

12. Note: **IPEDS** reporting stands for Institutional Post-Secondary Education Data Summary.

13. Click the **IPEDS Medical or Dental Reporting** checkbox if the employee is to be reported under the medical/dental sections of the IPEDS reports.

14. Click the **IPEDS reporting - employee paid with Soft Money** checkbox if the employee is paid with grant applicable monies.

   **Note:** The Electronic W-2 Consent section is populated from information entered by the employee in Employee Self Service relating to the delivery of W-2s.

15. Click the **Save** icon.
Tracking Faculty

The Faculty Action Tracking Form (PEFACT) displays information on faculty actions including primary activity, appointment dates, birth state or province, institution credit, and AAUP membership.

Information gathered on this form is also used for these regulatory reporting purposes: *The Annual Statistics Canadian Report for Canada*, *The Fall Staff Reporting in IPEDS*, and the *IPEDS Winter Data Collect Report* for the United States. If the Faculty indicator on the Installation Rule Form (PTRINST) has been set to None, the system will prevent action on PFACT, and faculty actions cannot be tracked.

Banner form

![Banner form screenshot](image-url)
**Steps**

Follow these steps to enter faculty information.

1. Access the Faculty Action Tracking Form (PEAFACT).
2. Enter the ID or click the **ID** Search icon to select the employee ID.
3. Click the **Next Block** icon.
4. Click the **Primary Activity** drop-down arrow and select a primary activity for the employee.
5. Click the **Primary Discipline** Search icon and select a discipline for the employee.
6. Enter the credit towards the number of years of service that the employee had with any prior institutions that may have bearing on current faculty action eligibility in the **Institution Credit** field.
   
   Note: Format is 999.99
7. Click the **Faculty Type** Search icon and select the type of faculty for this employee.
8. Click the **Faculty Compensation Level** Search icon and select a faculty compensation level from the Faculty Level Compensation Code Form.
   
   Note: This information will be used in determining the faculty member's base compensation package in the event your organization also considers other associated factors such as the faculty's seniority, teaching experience, cumulative credit hours etc when using Faculty Load and Compensation. This information will have to manually entered and maintained for each individual.
9. Click the **Birth State or Province** Search icon and select the state the employee was born.
10. Enter the employee's academic title in the **Academic Title** field.
11. If it applies, click the **Emeritus Status, Terminal Degree, and AAUP Member** checkbox (es).
12. Enter the employee's appointment begin (or end) date in the **Begin Date** and **End Date** fields.
13. Click the **Save** icon.

14. Click the **Exit** icon.
Changing an Employee’s Status

Introduction

The Employee Status Change Form (PEAESCH) allows you to change the employee’s status from a single form. With PEAESCH, an employee can be terminated, placed on extended leave, or reactivated from leave status.

For Banner 8.0, a tab navigation has been added to this form. Accordingly the following windows of the form can be accessed via their corresponding tabs, namely:

- Job Window
- Deduction Window
- Encumbrance Window
- For multi-year encumbering, two new blocks have been added to this window:
  - Salary Encumbrance Block.

Note: This block displays the salary encumbrance amounts for the Current Fiscal Years and for the period beyond the current fiscal year in the Future Year, the sum of all encumbrance amounts as the Total Encumbrance Amount. The existing field, Total Encumbrance Hours has been relocated to this block.

Banner form
Steps

Follow these steps to change an employee status.

1. Access the Employee Status Change Form (PEAESCH).

   Note: The Key block of PEAESCH not only identifies the employee whose status is to be changed, but also identifies the nature of the change in the Action field.

2. Click the ID Search icon and select and return the employee.

3. The Last Paid field indicates the very last paid date for all pay IDs for this employee.

4. Select a type of leave from the drop-down list in the Action field.

   Note: The choice entered in the Action field above determines the Next Block that the system presents for processing.

5. Click the All Records? checkbox.

   Note: If the All Records? checkbox is left blank; you may manually select the records to be affected by the Action field. If it is checked, all job and deduction records will automatically be affected by the action.

6. The Personnel Date field signifies the actual date on which the action, the status change, should/did take effect.

7. Click the Next Block icon.

8. Click the Leave Reason Search icon and enter the reason for the leave.

   Note: The default value for the field is the current termination reason (if any) on the associated Employee Form (PEAEMPL).

9. Enter the date that the leave will begin in the Leave Begin Date.

10. Click the Next Block icon.

11. The Position and Suffix fields display the position and suffix number of the job being described. Use the vertical scroll bar to move from one job to another, if needed.

12. The Job Title field displays the job title of the job being described.

13. The Job Type field describes the job type as Primary, Secondary, or Overload.

14. Enter the job begin date in the Job Beginning Date field.
15. Enter the payroll ID in the **Payroll ID** field.

16. Enter the Current Effective Date in the **Current Effective Date** field or Double click to bring up a calendar to select from.

17. The **Last Paid Date** field displays the last day for which the employee was paid for the job being described.

   Notes: The **Job End Date** on the General Job Information window of the associated Employee Jobs Form (NBAJOBS) must be greater than or equal to the **Last Paid date**.

18. The new **Effective Date** entered on NBAJOBS must be greater than or equal to the **Last Paid date**.

19. Enter the status in the **Status** display field.

20. If it applies, click the **Job Assignment Change** checkbox.

21. Enter the termination date in the **Effective Date** field.

   Notes: The date in this field is the date the action goes into effect for the payroll activities associated with the job. This date may differ from the actual date an action took place if the paperwork is submitted late. The **Personnel Date** would then reflect the date the action actually occurred.

22. If the **Personnel Date** entered in the Key block is greater than or equal to the **Last Paid** date for the job, the **Personnel Date** is the default value for this field.

23. If the **Personnel Date** is less than the **Last Paid** date, the default value depends on the value in the **Action** field.

24. You can override the default. If you do, the value you enter must be greater than or equal to the **Last Paid** date.

25. The **Status** field defaults.

   Notes: The system places a default value in the **Status** field according to the action specified in the Key block. If the action is specified as **Leave**, the system defaults the leave status value associated with the leave reason. One of the following values will default into this field: **Active**, **Leave without Pay/with Benefits**, **Leave without Pay/without Benefits**, **Leave with Pay/with Benefits**, **Leave with Part Pay/with Benefits**, or **Terminated**. You may override this value.

26. If the action is specified as **Return from Leave** the default value is **Active**. This can’t be changed if the record’s selected for reactivation.

27. The **Personnel Date** represents the actual date that the action specified in the Key Block took place.
Note: The default value is the Key block Personnel Date. You may override the default date. If the current Personnel Date on the associated Employee Jobs Form (NBAJOBS) record does not match the date entered on PEAESCH, the system updates NBAJOBS with the new value.

28. The Reason field specifies the job change reason and defaults from NBAJOBS.

Note: The field is validated against the Job Change Reason Rule Form (PTRJ CRE).

29. Click the Save icon.

30. Click the Exit icon.
**Querying Job Records**

**Introduction**

The Job Change Detail Display Form (PEAJ CDD) allows you to view changes to an employee's job record.

Note: It is recommended that a job change reason code be used to identify all changes made to a job record to provide clear identification for all actions.

**Banner form**

![Banner form of the Job Change Detail Display Form (PEAJ CDD)](image)
Steps

Follow these steps to view changes to an employee’s job record.

1. Access the Job Change Detail Display Form (PEAJCDD).
2. Enter the ID of the employee or click the ID Search icon.
3. Enter the position for which you wish to view the sequence of changes made to the employee’s job record in the Position field.
4. Enter the begin date for the display employee job actions in the Query From Date field.
5. Enter the end date for the display employee job actions in the Query To Date field.
6. Click the Next Block icon.
7. View information.
8. Click the Exit icon.
Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

What functions can be done within the Employee Status Change Form, PEAESCH? Employees can be:

a. Terminated
b. Placed on extended leave
c. Reactivated from leave status
d. All of the above
e. Only b and c

Question 2

When terminating an employee record using the Employee Form (PEAEMPL), you must select Terminated in the Employee status field.

True or False

Question 3

Which field changes the status of an employee?

a) Reason drop down field
b) Employee Status
c) Begin Date
d) None of the above
Answer Key

Question 1

What functions can be done within the Employee Status Change Form, PEAESCH?
Employees can be:

d) All of the above

Question 2

When terminating an employee record using the Employee Form (PEAEMPL), you must select *Terminated* in the *Employee* status field.

True.

Question 3

Which field changes the status of an employee?

b) Employee Status
Appendix

Special Processing Notes: Adjunct Faculty Assignments

Creating part-time, salaried assignments requires special attention, as default settings will provide incorrect pay results.

To help ensure proper pay of part-time assignments, please follow the example described below.

1. Access NBAJOBS
   a. Enter (or search for) the Employee’s ID in the ID field
   b. Enter (or search for) the appropriate Position in the Position field
   c. Enter the appropriate Suffix in the Suffix field
   d. Enter the date you want the assignment to start in the Query Date field.
   e. Perform a next block. The Job Set Up window will open
2. In the Job Set Up window:
   a. Override the Begin Date if necessary
   b. Select the appropriate Job Type (Primary, Secondary, Overload)
   c. For salaried assignments, enter the annual salary (i.e., the contract amount for teaching the course). For hourly assignments, enter the hourly rate.
   d. Click OK to complete the job set up. The next image displays the resulting Job Detail information.
It is vital that the Assign Salary is correct. We adjust the Assign Salary value by updating the Factor and Pays.

3. Change the Factor and Pays from the default values to equal the number of times the assignment will be paid during the term.

4. Save the record.
## Employee Class List

<table>
<thead>
<tr>
<th>2 Character Code</th>
<th>Short Description</th>
<th>Long Description</th>
<th>Salaried/Hourly</th>
</tr>
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<td>H</td>
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<td></td>
<td></td>
<td>Classified Regular FT, Salary Exempt, Eligible for Comp Lw or Straight Paid OT;</td>
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</tr>
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<td></td>
<td></td>
<td>Paying into retirement and/or FICA</td>
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<td>Classified FT Non Exempt</td>
<td>S</td>
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<td></td>
<td>Classified Regular FT, Salary Non Exempt Salary, eligible for Comp Time Straight,</td>
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<td></td>
<td>and Comp 1.5; Paying into retirement and/or FICA</td>
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<td>CLFTRESS</td>
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<td>DA41D1H</td>
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<td>Appointing authority hire a Temporary Salary Non Faculty Ex. registration, tutors; janitors or waiting on approval for hire.</td>
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<td>9ME 20 or 26 pay faculty, with benefits Contract</td>
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<td>REG/FT 12 Month Faculty eligible for benefits annual and sick leave</td>
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<td>SWFICAH</td>
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<td>GCFTEXS</td>
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<td>Classified Regular Grant FT, Salary Exempt, Eligible for Comp Lvl or Straight Paid OT; Paying into retirement and/or FICA</td>
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<tr>
<td>68</td>
<td>GUFTTMPH</td>
<td>Unclassified Grant PT Temporary</td>
<td>PT/Temp Non Faculty, no benefits, hourly.</td>
</tr>
<tr>
<td>69</td>
<td>GU9MFAS</td>
<td>Uncl Grant 9 month Faculty</td>
<td>Grant 9ME 20 or 26 pay faculty, with benefits Contract</td>
</tr>
<tr>
<td>70</td>
<td>GU12MFAS</td>
<td>Uncl Grant 12 month Faculty</td>
<td>REG/FT Grant 12 Month Faculty eligible for benefits annual and sick leave</td>
</tr>
<tr>
<td>71</td>
<td>GUADJFAH</td>
<td>Uncl Grant Adj Faculty Hourly</td>
<td>Grant Adjunct Faculty Hourly. No leave. Possible Retirement.</td>
</tr>
<tr>
<td>72</td>
<td>GUADJFAS</td>
<td>Uncl Grant Adj Faculty Salary</td>
<td>Grant Adjunct Faculty Salary. No leave. Possible Retirement.</td>
</tr>
<tr>
<td>90</td>
<td>PERDIEMH</td>
<td>Per Diem</td>
<td>Board Members</td>
</tr>
<tr>
<td>EH</td>
<td>EXSERVH</td>
<td>Extra Service Assig Hourly</td>
<td>Additional duty pay - Hourly. This class is used only on the assignment not on the employee.</td>
</tr>
<tr>
<td>ES</td>
<td>EXSERVS</td>
<td>Extra Service Assig Salary</td>
<td>Additional duty pay - Salary. This class is used only on the assignment not on the employee.</td>
</tr>
<tr>
<td>OV</td>
<td>OVRLOADS</td>
<td>Overload Assignment Contract</td>
<td>Faculty overload pay - Contract. This class is used only on the assignment not on the employee.</td>
</tr>
<tr>
<td>DC</td>
<td>Default</td>
<td>Default Code</td>
<td></td>
</tr>
</tbody>
</table>
### Forms Job Aid  FIX

<table>
<thead>
<tr>
<th>Form</th>
<th>Full Name</th>
<th>Use this Form to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>NBAJOBS</td>
<td>Employee Jobs Form</td>
<td>assign a job to the new employee using the new person record and new position and position class in the system.</td>
</tr>
<tr>
<td>PEAEMPL</td>
<td>Employee Form</td>
<td>establish information about an employee’s terms of employment.</td>
</tr>
<tr>
<td>PEAESCH</td>
<td>Employee Status Change Form</td>
<td>change the employee’s status from a single form. With PEAESCH, an employee can be terminated, placed on extended leave, or reactivated from leave status.</td>
</tr>
<tr>
<td>PEAFACT</td>
<td>Faculty Action Tracking Form</td>
<td>display information on faculty actions including primary activity, appointment dates, birth state or province, institution credit, and AAUP membership.</td>
</tr>
<tr>
<td>PEAHIRE</td>
<td>New Hire Form</td>
<td>establish an employee in the system.</td>
</tr>
<tr>
<td>PEAJCDD</td>
<td>Job Change Detail Display Form</td>
<td>view changes to an employee’s job record.</td>
</tr>
<tr>
<td>PEAREVV</td>
<td>Employee Review Form</td>
<td>collect data about a specified employee’s performance reviews.</td>
</tr>
</tbody>
</table>