

# Banner Human Resources Maintaining Person and Employee Records Training Workbook

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<b>March 2011</b>	<b>New version that supports Banner Human Resources 8.4 software.</b>
<b>October 2011</b>	<b>Revised version to support LCTCS End User Training.</b>

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Think before you print.

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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

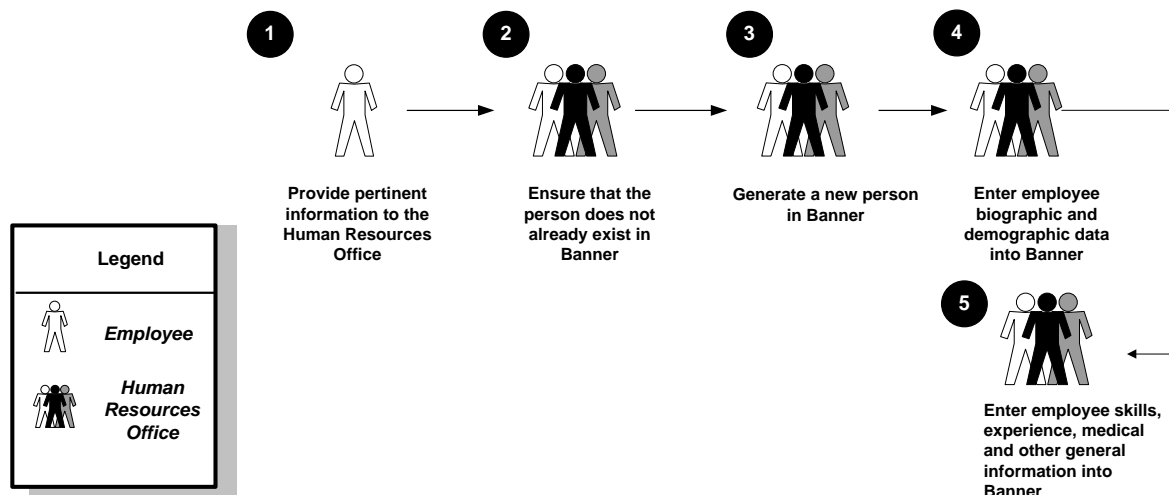
## Introduction

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.



## What happens

The stages of the process are described in this table.

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

# 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

## 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 if 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

If you want to...	Then...
review the new record and add more information.	select the desired tab.
add another new employee	click the <b>Generate ID</b> icon.
exit this form.	click the <b>X (Close)</b> icon.

# 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

Identification PPAIDEN 8.2

ID: A00010548 Claire F Flores Generate ID:

Current Identification **Alternate Identification** Address Telephone Biographical E-mail Emergency Contact Additional Identification

**Alternate Names or IDs**

Name Type:	BRTH Birth Name	Change Type:	Name	Origin:	PPAIDEN
ID:	A00010548			User:	RGROSSBA
Last Name Prefix:				Activity Date:	22-DEC-2010
Last Name:	Johnson			Create User:	RGROSSBA
First Name:	Claire			Create Date:	22-DEC-2010
Middle Name:					
Name Type:		Change Type:		Origin:	
ID:				User:	
Last Name Prefix:				Activity Date:	
Last Name:				Create User:	
First Name:				Create Date:	
Middle Name:					

## 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

The screenshot shows the PPAIDEN software interface for entering address information. The window title is "Identification PPAIDEN 8.2". The user ID is "A00010548" and the name is "Claire F Flores". There is a "Generate ID" button. The "Address" tab is selected among other tabs like "Current Identification", "Alternate Identification", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification".

Form fields include:

- From Date:** 02-FEB-2009
- To Date:** (empty)
- Address Type:** MA (Mailing)
- Sequence Number:** 1
- House Number:** (empty)
- Street Line 1:** 189 Main Street
- Street Line 2:** (empty)
- Street Line 3:** (empty)
- Street Line 4:** (empty)
- City:** Malvern
- State or Province:** PA (Pennsylvania)
- ZIP or Postal Code:** 19355
- County:** 001 (Chester)
- Nation:** 157 (United States of America)
- Telephone Type:** MA (Mailing)
- Country Code:** (empty)
- Area Code:** 610
- Phone Number:** 555-1212
- Extension:** (empty)

Additional options on the right:

- Inactivate Address
- Source:** SELF
- Delivery Point:** (empty)
- Correction Digit:** (empty)
- Carrier Route:** (empty)

**Last Update** box:

- User:** RGROSSBA
- Activity Date:** 22-DEC-2010

## 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

The screenshot shows the PPAIDEN 8.2 software interface. At the top, there is a window title bar that reads "Identification PPAIDEN 8.2". Below the title bar, there is a header area with the following fields: "ID: A00010548" (with a dropdown arrow), "Claire F Flores" (text input), and "Generate ID: [icon]". Below the header, there is a navigation bar with several tabs: "Current Identification", "Alternate Identification", "Address", "Telephone" (which is highlighted in blue), "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". The main content area is divided into two sections. The first section is for the current telephone entry and contains the following fields: "Telephone Type:" (with a dropdown menu showing "MA" and "Mailing"), "Country Code:" (text input), "Area Code:" (text input with "610"), "Phone Number:" (text input with "555-1212"), "Extension:" (text input), "International Access:" (text input), "Comment:" (text input), "Address Type:" (with a dropdown menu showing "MA" and "Mailing"), "Sequence:" (dropdown menu with "1"), "Activity Date:" (text input with "02-FEB-2009"), and "User:" (text input with "RGROSSBA"). There are also three checkboxes: "Primary" (checked), "Unlisted" (unchecked), and "Inactivate" (unchecked). The second section is for adding a new telephone entry and contains the same fields as the first section, but they are currently empty or have default values.

## 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

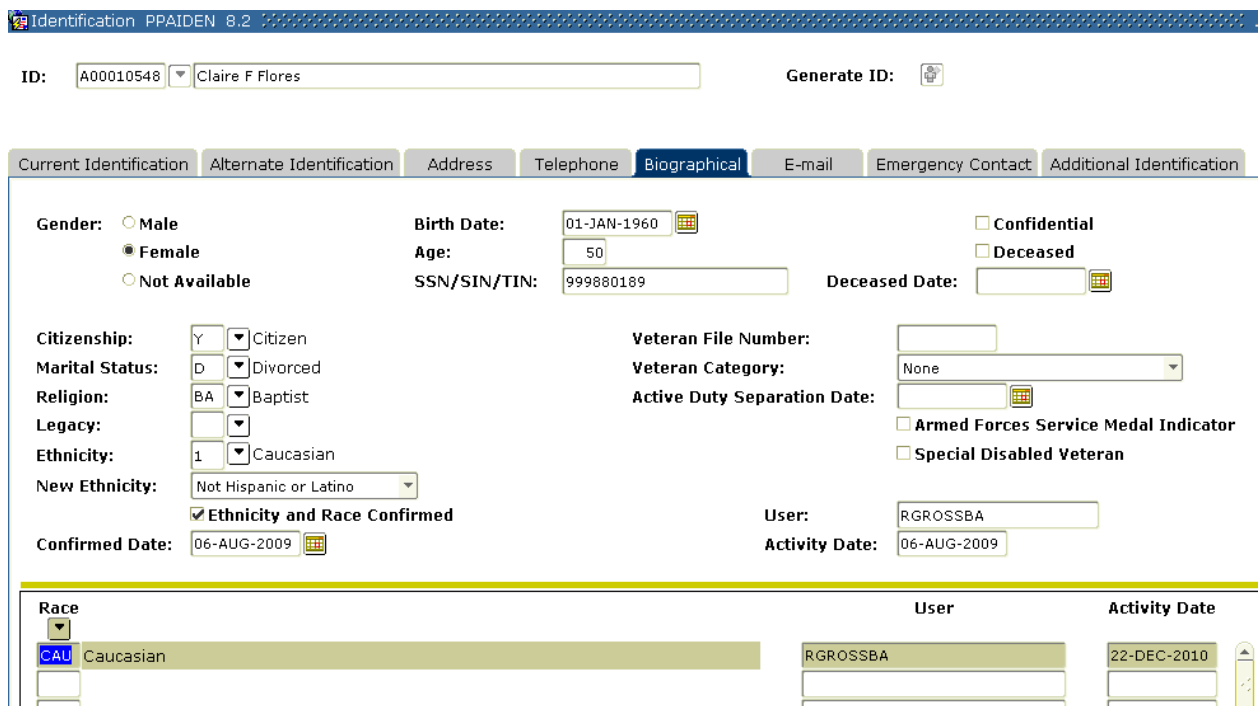
## Introduction

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




Identification PPAIDEN 8.2

ID: A00010548 Claire F Flores Generate ID: 


Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

Gender:  Male  Female  Not Available

Birth Date: 01-JAN-1960 

Age: 50

SSN/SIN/TIN: 999880189

Deceased Date: 

Confidential  
 Deceased

Citizenship:  Citizen


Marital Status:  Married  Divorced  Widowed  Single

Religion:  Baptist

Legacy:  Legacy

Ethnicity:  Caucasian


New Ethnicity:  Not Hispanic or Latino

Confirmed Date: 06-AUG-2009 

Ethnicity and Race Confirmed

Veteran File Number:


Veteran Category: None

Active Duty Separation Date: 

Armed Forces Service Medal Indicator  
 Special Disabled Veteran

User: RGROSSBA

Activity Date: 06-AUG-2009

Race	User	Activity Date
<input checked="" type="checkbox"/> CAU Caucasian	RGROSSBA	22-DEC-2010 
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>



## 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 **Marital 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

The screenshot shows a web browser window titled "Identification PPAIDEN 8.2 (s10b80)". The main content area has several tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". The "E-mail" tab is selected and highlighted in blue.

At the top of the form, there is an "ID:" field with a dropdown menu showing "A00020389" and a text input field containing "Daisy Ross". To the right is a "Generate ID:" button with a small icon.

The "E-mail" tab contains three identical form sections, each with the following fields:

- E-mail Type:** A dropdown menu.
- E-mail Address:** A long text input field.
- Comment:** A text input field.
- Activity Date:** A date input field.
- User:** A text input field.

Between the "E-mail Address" and "Comment" fields, there are four checkboxes: "Preferred", "Inactivate", "Display on Web", and "URL". In the first section, "Display on Web" is checked. The "Preferred" checkbox is also checked in the first section.

## 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

The screenshot shows a web browser window titled "Identification PPAIDEN 8.2 (s10b80)". The main content area has several tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact" (which is selected and highlighted in blue), and "Additional Identification".

At the top of the form, there is an "ID:" field with a dropdown menu showing "A00020389" and a text input field containing "Daisy Ross". To the right is a "Generate ID:" button with a refresh icon.

The "Emergency Contact" tab contains the following fields:

- Priority:** A checkbox.
- Relationship:** A dropdown menu.
- Telephone:** A section with four sub-fields: "Country Code", "Area Code", "Phone Number", and "Extension".
- Name Fields:** "Last Name Prefix:", "Last Name:", "First Name:", and "Middle Name:", each with a text input field.
- Address Fields:** "Address Type:" (checkbox), "House Number:", "Street Line 1:", "Street Line 2:", "Street Line 3:", "Street Line 4:", "City:", "State or Province:" (dropdown), "ZIP or Postal Code:" (dropdown), and "Nation:" (dropdown).
- Last Update:** A box containing "User:" and "Activity Date:" fields.

A vertical scrollbar is visible on the right side of the form.

## 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.

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

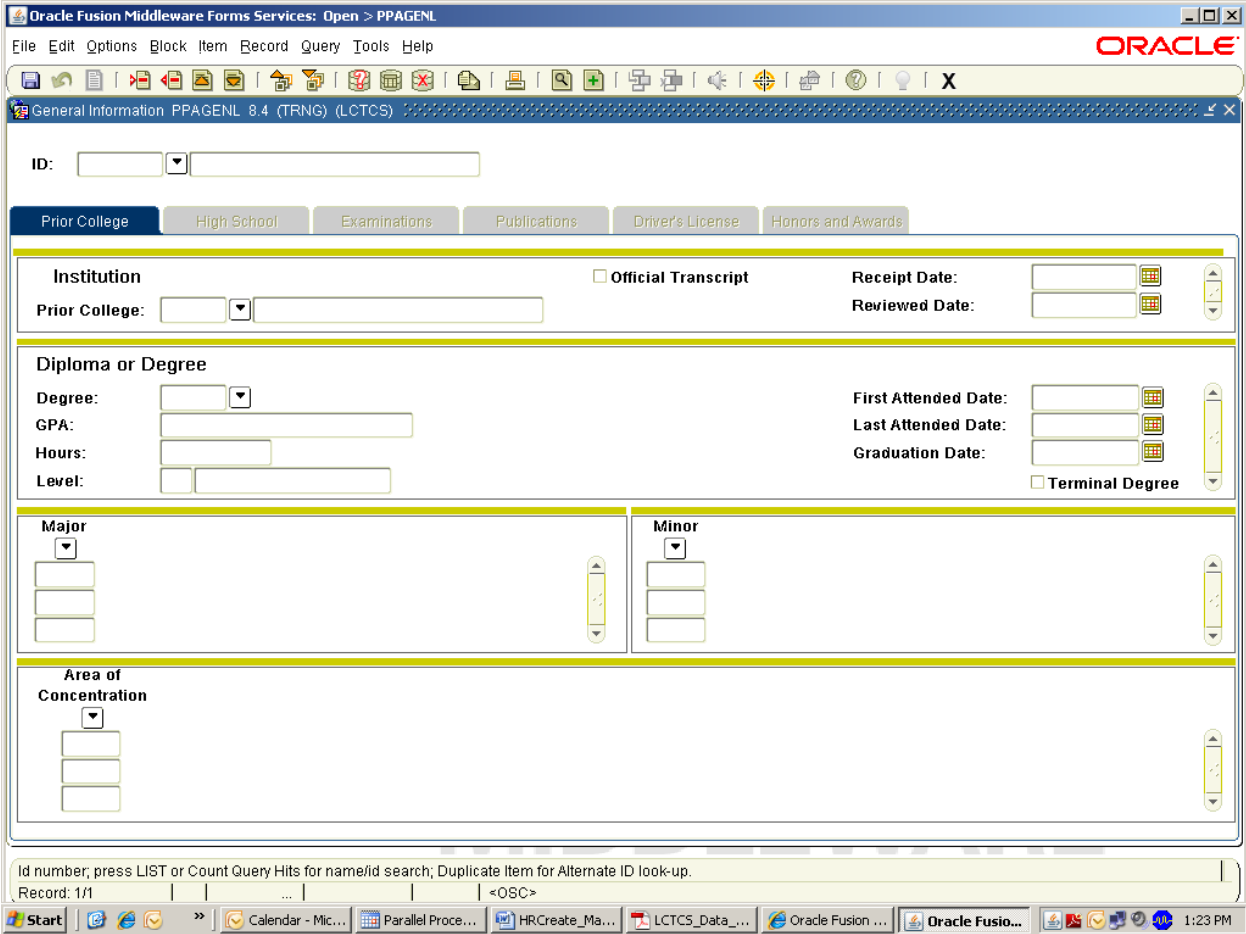
# Entering General Information

## 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 (PEAFAC).

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.



## Publications tab

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

The screenshot shows a web-based application interface. At the top, there is a browser window title bar that reads "General Information PPAGENL 8.0 (BAN8)". Below this, there is a header area with a dropdown menu showing "ID: 701000010" and a text box containing "Mrs. Judy M. Johnson". Below the header is a navigation bar with several tabs: "General Education", "Examinations", "Publications" (which is highlighted in blue), "Driver's License", "Honors and Awards", and "Transcript". The main content area is a form for entering publication information. It includes the following fields: "Type:" with a dropdown menu, "Title:" with a text box, "Publisher:" with a text box, "Publication Issue:" with a text box, "Publication Volume:" with a text box, "Publication Date:" with a date picker icon, and "Pages:" with a text box. The form fields are currently empty or contain placeholder text.

## 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

The screenshot shows the Oracle HR system interface for the 'Driver's License' tab. At the top, the user ID is 701000010 and the name is Mrs. Judy M. Johnson. The 'Driver's License' tab is selected, showing two license entries. The first entry has a License Number field, License Status set to 'Current', State or Province, Type, Issue Date (01-JAN-4712), and Expiration Date. The second entry has empty fields for License Number, License Status, State or Province, Type, Issue Date, and Expiration Date.

## 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/Providence code.
8. Double-click in the **Nation** field and select and return a Nation code.
9. Click the **Save** icon.

## Honors and Awards tab

General Information PPAGENL 8.0 (BAN8)

ID: 701000010 Mrs. Judy M. Johnson

General Education Examinations Publications Driver's License **Honors and Awards** Transcript

Honors or Award Title:

Awarding Organization:

Awarded Date:

Expired Date:

Activity Date: 24-MAR-2008

Honors or Award Title:

Awarding Organization:

Awarded Date:

Expired Date:

Activity Date:

## Steps

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.

The screenshot shows a software window titled "General Information PPAGENL 8.0 (BAN8\_WIN)". At the top, there is an "ID:" field with the value "210009506" and a name field containing "Mr. Anthony Abbe". Below this is a horizontal menu with tabs for "General Education", "Examinations", "Publications", "Driver's License", "Honors and Awards", and "Transcript". The "Transcript" tab is currently selected and highlighted in blue. Underneath the tabs, there is a section titled "Official Transcript" with a checkbox. Below this checkbox are two date fields: "Receipt Date:" and "Reviewed Date:", each with a calendar icon to its right. At the bottom of the window, there is a status bar that reads "Official Transcript Indicator." and "Record: 1/1" followed by a table with several empty cells and a "<OSC>" button.

## 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

The screenshot shows the PPACERT 8.0 (BANB) web application interface. At the top, the browser title is "Certification Information PPACERT 8.0 (BANB)". Below the title bar, there is a form with an "ID:" field containing the value "367925284" and a dropdown menu showing "Erin E Adams".

The main form is divided into two sections. The upper section is a table with the following columns: "Certification Code", "Certification Number", "Certification Date", "Next Certification Date", "Expiration Date", and "License or Certification Status". The "Certification Code" column has a dropdown menu. The "Certification Date", "Next Certification Date", and "Expiration Date" columns have calendar icons. The "License or Certification Status" column has a dropdown menu. There are six rows of empty input fields in this table.

The lower section is for entering endorsement information. It has a "Certification Code:" label followed by two input fields. To the right, there is a vertical list of five empty input fields for "Endorsement Code", with a dropdown menu above the first one. To the right of that, there is a vertical list of five empty input fields for "Endorsement Date", with a calendar icon above the first one.

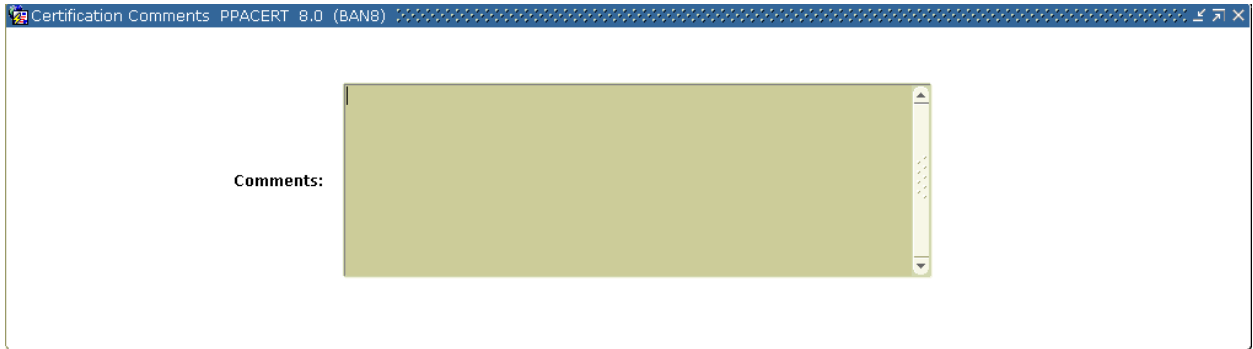


## Steps

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

The screenshot shows a web browser window titled "Person Experience PPAEXPR 8.0 (BANB)". At the top, there is a search bar with "ID: 888079999" and a dropdown menu showing "Gladys Cozart". Below this is a yellow horizontal separator line. The main form area is divided into several sections:

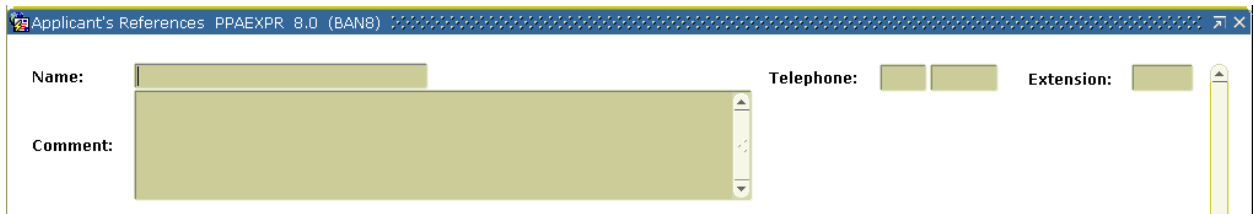
- Experience:** Fields for Employer Name, Start Date, End Date, Employer Experience Type, Reason for Leaving, State or Province, and Nation.
- Job Duties:** Fields for Job Title, Job Duties, and Number of Employees Supervised.
- Supervisor:** Fields for Name, Telephone, Area, and Extension, with a checkbox for "OK to Contact".
- Salary:** Fields for Current or Ending Salary and Current or Ending Rate.
- Comments:** A large text area for entering additional information.

## 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



The screenshot shows a window titled "Applicant's References PPAEXPR 8.0 (BAN8)". The form contains the following fields:

- Name:** A single-line text input field.
- Telephone:** A three-part input field for entering a phone number.
- Extension:** A single-line text input field.
- Comment:** A large multi-line text area with a vertical scrollbar.

## 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

International Information GOAINTL 8.0 (BAN8)

ID: 888079999 Gladys Cozart

Visa Passport Certification of Eligibility Nationality

**Visa Information**

Sequence Number:  Entry

Number of Entries:

Date Requested:

Date Issued:

Start Date:

End Date:

Visa Type:

Visa Number:

Nation of Issue:

Issuing Authority:

Port of Entry:

**Document Information**

Document	Description	Source	Description	Date Requested	Disposition	Date Received
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>

## 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

International Information GOAINTL 8.0 (BANB)

ID: 888079999 Gladys Cozart

Visa **Passport** Certification of Eligibility Nationality

**Passport**

Number:

Nation of Issue:

Expiration Date:

**Admission and Departure**

Status:

Expiration Date:

Alien Registration Number:

Duration of Stay

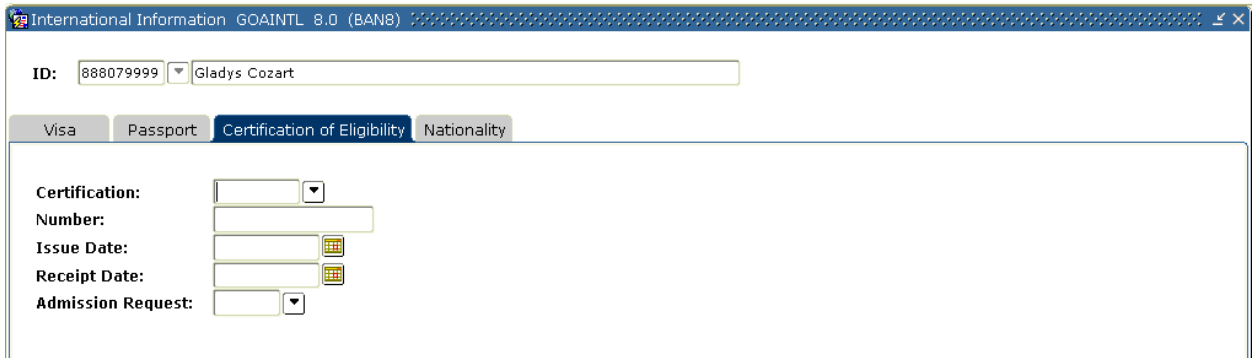
## Steps

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



The screenshot shows a software window titled "International Information GOAINTL 8.0 (BAN8)". At the top, there is an "ID:" field with the value "888079999" and a dropdown menu showing "Gladys Cozart". Below this are four tabs: "Visa", "Passport", "Certification of Eligibility" (which is selected and highlighted), and "Nationality". The "Certification of Eligibility" tab contains several fields: "Certification:" with a dropdown menu, "Number:" with a text input field, "Issue Date:" with a text input field and a calendar icon, "Receipt Date:" with a text input field and a calendar icon, and "Admission Request:" with a dropdown menu.

## Steps

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

International Information GOAINTL 8.0 (BAN8)

ID: 888079999 Gladys Cozart

Visa Passport Certification of Eligibility **Nationality**

**Nationality**

Nation of Birth:

Nation of Citizen:

Native Language:

Sponsor:

Employment Type:

Foreign Tax ID:

**Family**

Spouse Accompanying Person To Country: Not Reported

Number of Children Accompanying Person:

Signature for Availability of Funds: Not Reported

## 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 Accompany 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

The screenshot shows a web browser window titled "E-mail Address GOAEMAL 8.0 (BAN8)". At the top, there is a form for the user's ID and name. The ID is "888079999" and the name is "Gladys Cozart". Below this is a tab labeled "E-mail". The main area contains three identical rows for entering e-mail information. Each row includes:

- E-mail Type: A dropdown menu.
- E-mail Address: A text input field.
- Comment: A text input field.
- Activity Date: A date input field.
- User: A text input field.
- Four checkboxes: Preferred, Inactivate, Display on Web, and URL.

A vertical scrollbar is visible on the right side of the form area.

## 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

The screenshot shows a web browser window titled "Comment: PPACMNT 8.0 (BAN8)". At the top, there is a form with an "ID:" label, a dropdown menu showing "888079999", and a text box containing "Gladys Cozart". Below this, the form is divided into two main sections: "Coded Comments" and "Free-Form Comments".

**Coded Comments**

This section contains three rows of input fields. Each row has a "Code:" label followed by a small dropdown menu, and a "Comment:" label followed by a larger text input field. A vertical scrollbar is visible on the right side of this section.

**Free-Form Comments**

This section contains a single large text input field for free-form comments, with a vertical scrollbar on the right side.

## 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

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## 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, PDAEDN, 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.

IF you want to...	THEN use...
set up a new employee with <b>minimal</b> personal information and link to a job <b>immediately</b> .	PEAHIRE
set up a new employee with <b>detailed</b> personal information and link to a <b>job later</b> .	PPAIDEN  Note: You can use the PEAHIRE form to link a person to a job without having to re-enter data submitted through PPAIDEN.
update information about a person.	PPAIDEN

## PEAHIRE Process Overview

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

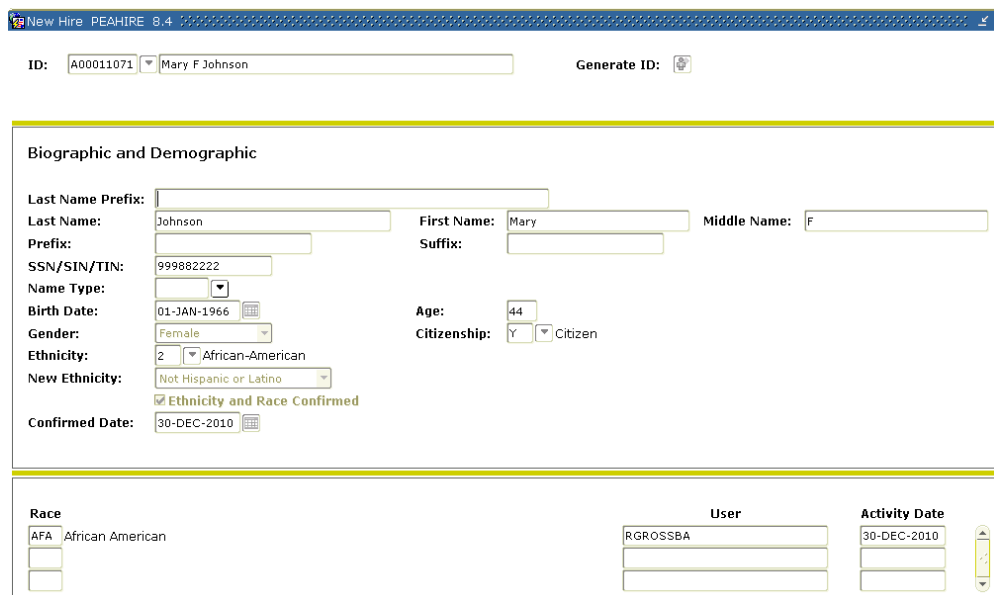
- new person record information
- biographical information
- address and telephone information
- employee information
- job information.

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



New Hire PEAHIRE 3.4

ID: A00011071 Mary F Johnson Generate ID: 

---

**Biographic and Demographic**

Last Name Prefix:

Last Name: Johnson First Name: Mary Middle Name: F

Prefix:  Suffix:

SSN/SIN/TIN: 999882222

Name Type:

Birth Date: 01-JAN-1966 Age: 44

Gender: Female Citizenship: Y Citizen

Ethnicity: 2 African-American

New Ethnicity: Not Hispanic or Latino

Ethnicity and Race Confirmed

Confirmed Date: 30-DEC-2010

---

**Race**

AFA African American

**User**

RGROSSBA

**Activity Date**

30-DEC-2010

## 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

**Biographic and Demographic**

ID: A00010896 Jamie S. Smith Generate ID:

Last Name Prefix:

Last Name: Smith First Name: Jamie Middle Name: S.

Prefix:  Suffix:

SSN/SIN/TIN: 999660030

Name Type:

Birth Date: 30-DEC-1990 Age: 19

Gender: Female Citizenship: Y Citizen

Ethnicity: 1 Caucasian

New Ethnicity: Not Hispanic or Latino

Ethnicity and Race Confirmed

Confirmed Date:

Race	User	Activity Date
<input type="text"/> CAU Caucasian	RGROSSBA	31-DEC-2009
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: Use PPAIDEN to change information displayed on this screen.

## Steps

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

New Hire PEAHIRE 8.4

ID: A00011071 Mary F Johnson Generate ID: 

---

**Address**

<p><b>From Date:</b> 30-DEC-2010  <b>To Date:</b> <input type="text"/> </p> <p><b>Address Type:</b> MA <input type="checkbox"/> Mailing</p> <p><b>Sequence Number:</b> 1</p> <p><b>House Number:</b> <input type="text"/></p> <p><b>Street Line 1:</b> 222 Main Street</p> <p><b>Street Line 2:</b> <input type="text"/></p> <p><b>Street Line 3:</b> <input type="text"/></p> <p><b>Street Line 4:</b> <input type="text"/></p> <p><b>City:</b> Malvern</p> <p><b>State or Province:</b> PA <input type="checkbox"/> Pennsylvania</p> <p><b>ZIP or Postal Code:</b> 19355</p> <p><b>County:</b> 001 <input type="checkbox"/> Chester</p> <p><b>Nation:</b> 157 <input type="checkbox"/> United States of America</p> <p><b>Telephone Type:</b> MA <input type="checkbox"/> Mailing</p>	<p><input type="checkbox"/> <b>Inactivate Address</b></p> <p><b>Source:</b> <input type="text"/> <input type="checkbox"/></p> <p><b>Delivery Point:</b> <input type="text"/></p> <p><b>Correction Digit:</b> <input type="text"/></p> <p><b>Carrier Route:</b> <input type="text"/></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Last Update</b></p> <p><b>User:</b> RGROSSBA</p> <p><b>Activity Date:</b> 30-DEC-2010</p> </div> <table border="0" style="width: 100%; margin-top: 10px;"> <tr> <td style="text-align: right;"><b>Country Code</b></td> <td style="text-align: right;"><b>Area Code</b></td> <td style="text-align: right;"><b>Phone Number</b></td> <td style="text-align: right;"><b>Extension</b></td> </tr> <tr> <td><input type="text"/></td> <td>610</td> <td>555-1212</td> <td><input type="text"/> <input type="checkbox"/></td> </tr> </table>	<b>Country Code</b>	<b>Area Code</b>	<b>Phone Number</b>	<b>Extension</b>	<input type="text"/>	610	555-1212	<input type="text"/> <input type="checkbox"/>
<b>Country Code</b>	<b>Area Code</b>	<b>Phone Number</b>	<b>Extension</b>						
<input type="text"/>	610	555-1212	<input type="text"/> <input type="checkbox"/>						

## 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.

## Employee and Job information screen

The screenshot shows a software window titled "New Hire PEAHIRE 8.4". At the top, there is an "ID:" field with the value "A00011071" and a search icon, and a "Generate ID:" button with a search icon. Below this is a horizontal separator line. The "Employee" section contains the following fields: "Employee Class:" with a dropdown menu showing "03" and "FT Clerical"; "Original Hire:" with a date field showing "01-DEC-2010"; "Home Department COA:" with a dropdown menu showing "B"; "Organization:" with a dropdown menu showing "100" and "Office of the President"; "Benefit Category:" with a dropdown menu showing "F1" and "Full Time Employees"; and a checked checkbox labeled "Allow New Hire Benefits Enrollment". Below the Employee section is another horizontal separator line. The "Job" section contains the following fields: "Position:" with a dropdown menu showing "C99998"; "Suffix:" with a text field showing "0"; "Title:" with a text field showing "Clerk III"; "Begin Date:" with a date field showing "01-JAN-2011"; "Job Type:" with a dropdown menu showing "Primary" and a checked checkbox labeled "Deferred Pay"; "Step:" with a dropdown menu showing "10"; "Rate:" with a text field showing "16.000000"; "Annual Salary:" with a text field showing "31,200.00"; and "Change Reason:" with a dropdown menu.

## 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**

FT faculty and staff	Suffix =00
FT faculty and staff that have multiple assignments	Suffix =02, etc...
FT 9ME/20 pay faculty	Suffix =20
FT 9ME/20 faculty that have multiple assignments	Suffix =21, 22, etc...
FT9ME/26 pay faculty	Suffix =26
FT9ME/26 pay faculty that have multiple assignment	Suffix =27, 28, etc...
Part-Time "non faculty" assignment	Suffix =30
Part-Time "faculty" assignment	Suffix =40
Students assignment	Suffix =01

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 NBAJOBS (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 NBAJOBS.

## Banner form

Employee PEAEMPL 8.4

ID: A00010809 Brian F Bell

General Employee United States Regulatory Canadian Regulatory

**Employee Status:** Active

**Employee Class:** 02 FT Professional

**Employee Group:**

**Leave Category:** P1 Professionals - Fulltime

**Benefit Category:** F1 Full Time Employees

**Part or Full Time Status:** Full Time

Allow New Hire Benefits Enrollment

**Home Department:** B 2110 Biology

**Check Distribution:** B 2110 Biology

**District or Division:**

**Service Dates**

**Current Hire:** 01-OCT-2008

**Original Hire:** 01-OCT-2008

**Adjusted Service:** 01-OCT-2008

**Seniority:** 01-OCT-2008

**First Work Date:** 01-OCT-2008

**Last Work Date:**

**Termination**

**Reason:**

**Termination Date:**

**Leave of Absence**

**Reason:**

**Begin Date:**

**End Date:**

**Hiring Location**

**Location:** DTOWN BANNER U. Down Town Campus

**College:** AG College of Agriculture

**Campus:** M Main

## 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 (GTVDICD). 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, PEIEHIS.

# 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

The screenshot displays the NBAJOBS Employee Jobs form for employee Brian F Bell (ID: A00010809). The form is currently on the 'Job Detail' tab. Key fields include:

- ID:** A00010809, **Name:** Brian F Bell
- Position:** F99999, **Suffix:** 01
- Last Paid Date:** 31-MAR-2010, **Query Date:** 01-JUL-2010
- Begin Date:** 01-OCT-2008, **End Date:** (empty), **Job Type:** Secondary
- IPEDS Reporting Indicator**
- COA:** B,  **Accrue Leave**,  **Civil Service**
- Increase MM and DD:** (empty), **Eligible Date:** (empty), **Deferred Balance:** 0.00
- Salary Encumbrance:**

Total Encumbrance Hours:	
Current Fiscal Year:	60,000.00
Future Years:	0.00
Total Encumbrance:	60,000.00
- Probationary Data:**

Probationary Period:	
Probationary Begin Date:	
Probationary End Date:	
- Contract Information:**

Start Date:	
End Date:	
Total Contract Hours:	
- Fringe Encumbrance:**

Current Fiscal Year:	17,400.00
Future Years:	0.00
Total Encumbrance:	17,400.00



## 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

<b>FT faculty and staff</b>	<b>Suffix =00</b>
<b>FT faculty and staff that have multiple assignments</b>	<b>Suffix =02, 03, etc...</b>
<b>FT 9ME/20 pay faculty</b>	<b>Suffix =20</b>
<b>FT 9ME/20 faculty that have multiple assignments</b>	<b>Suffix =21, 22, etc...</b>
<b>FT9ME/26 pay faculty</b>	<b>Suffix =26</b>
<b>FT9ME/26 pay faculty that have multiple assignment</b>	<b>Suffix =27, 28, etc...</b>
<b>Part-Time "non faculty" assignment</b>	<b>Suffix =30</b>
<b>Part-Time "faculty" assignment</b>	<b>Suffix =40</b>
<b>Students assignment</b>	<b>Suffix =01</b>

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

Employee Jobs NBAJOBS 8.4

ID: A00010809 Brian F Bell  
Position: F99999 Suffix: 01  
Last Paid Date: 31-MAR-2010  
Query Date: 01-JUL-2010

Base Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded Deductions/... Default Earnings Work Schedules Job Labor Distribution

Effective Date: 01-JUL-2010  
Personnel Date: 01-JUL-2010  
Status: Active  
Title: Assistant Professor  
Job FTE: 1.000  
Appointment Percent: 100.00  
Encumbrance Hours:  
Encumbrance Indicator: System Calculated  
Hours per Day: 8.00  
Employee Class: 08 Permanent Full-time Faculty  
Leave Category:  
Change Reason: 00002 Cost of Living Adjustment  
Employer Code: BU Banner University

Pay Plan  
Group: 2011 Grade: 01  
Table: FP Step: 0

Compensation  
Rate: 28,846,709  
Hours per Pay: 173.33  
Assign Salary: 5,000.00  
Factor: 12.0  
Pays: 12.0  
Annual Salary: 60,000.00

## 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

**Job FTE** field.

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.

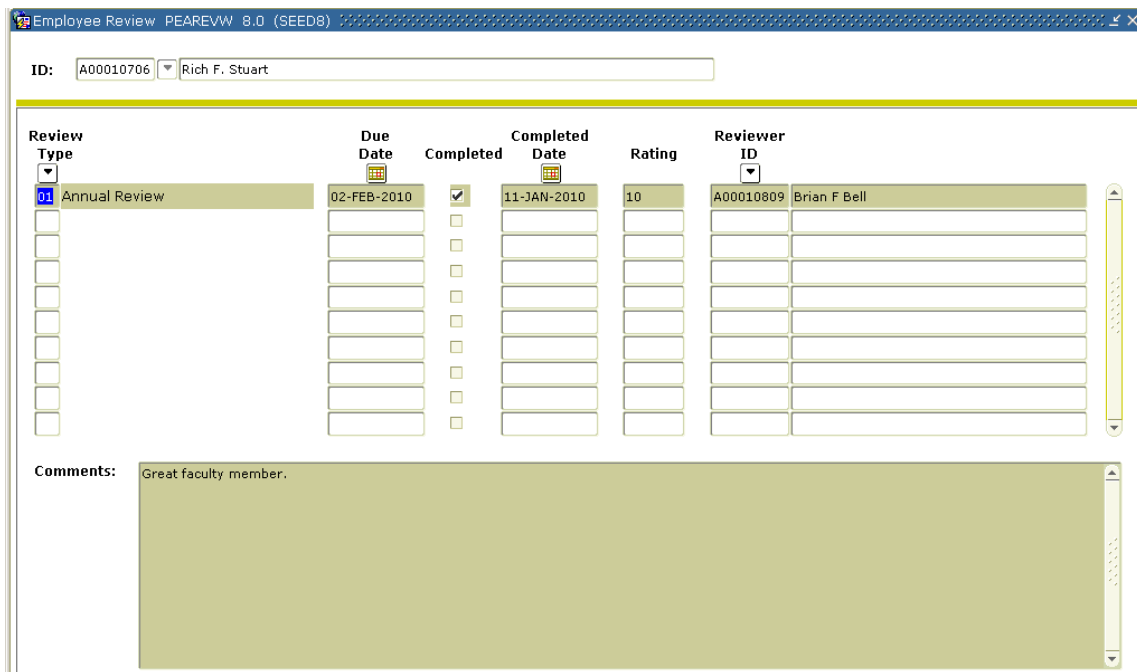
15. Click the **Save** icon.
16. Click the **Exit** icon.
17. Note: In the Compensation information area of the block, the pay period salary is represented. For hourly employees, this is a calculated rate, based on the hours per pay established at the employee class level.

# 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



Review Type	Due Date	Completed	Completed Date	Rating	Reviewer ID
01 Annual Review	02-FEB-2010	<input checked="" type="checkbox"/>	11-JAN-2010	10	A00010809 Brian F Bell
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			
<input type="checkbox"/>		<input type="checkbox"/>			

Comments: Great faculty member.

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

The screenshot displays the 'Employee PEAEMPL 8.4' web form. At the top, the employee ID is 'A00010706' and the name is 'Rich F. Stuart'. Below this are three tabs: 'General Employee', 'United States Regulatory', and 'Canadian Regulatory'. The form is divided into several sections:

- Employee Status:** Active (dropdown)
- Employee Class:** 08 (dropdown), Permanent Full-time Faculty
- Employee Group:** (dropdown)
- Leave Category:** F1 (dropdown), Faculty
- Benefit Category:** F1 (dropdown), Full Time Employees
- Part or Full Time Status:** Full Time (dropdown)
- Allow New Hire Benefits Enrollment
- Home Department:** B (dropdown), 1100 (dropdown), Finance Office
- Check Distribution:** B (dropdown), 1100 (dropdown), Finance Office
- District or Division:** (dropdown)
- Service Dates:**
  - Current Hire: 01-JAN-2005 (calendar icon)
  - Original Hire: 01-JAN-2005 (calendar icon)
  - Adjusted Service: 01-JAN-2005 (calendar icon)
  - Seniority: 01-JAN-2005 (calendar icon)
  - First Work Date: 01-JAN-2005 (calendar icon)
  - Last Work Date: (calendar icon)
- Termination:**
  - Reason: (dropdown)
  - Termination Date: (calendar icon)
- Leave of Absence:**
  - Reason: (dropdown)
  - Begin Date: (calendar icon)
  - End Date: (calendar icon)
- Hiring Location:**
  - Location: (dropdown)
  - College: (dropdown)
  - Campus: (dropdown)

## 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

The screenshot shows the Employee PEAEMPL 8.4 form. At the top, the employee ID is A00010706 and the name is Rich F. Stuart. The form is divided into several sections:

- General Employee** (selected):
  - Employee Status: Active
  - Employee Class: 06 Permanent Full-time Faculty
  - Employee Group: [empty]
  - Leave Category: F1 Faculty
  - Benefit Category: F1 Full Time Employees
  - Part or Full Time Status: Full Time
  - Allow New Hire Benefits Enrollment
  - COA: B, Organization: 1100 Finance Office
  - Home Department: B, Check Distribution: B, District or Division: [empty]
- 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-JAN-2005
  - Last Work Date: [empty]
- Termination**:
  - Reason: [empty]
  - Termination Date: [empty]
- Leave of Absence**:
  - Reason: [empty]
  - Begin Date: [empty]
  - End Date: [empty]
- Hiring Location**:
  - Location: [empty]
  - College: [empty]
  - Campus: [empty]

## 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

The screenshot shows the 'Employee PEAEMPL 8.4' application window. At the top, there is a header bar with the title and a close button. Below the header, there is a search bar with 'ID: A00011710' and a text field containing 'Sam Bradford'. Below this, there are three tabs: 'General Employee', 'United States Regulatory' (which is selected), and 'Canadian Regulatory'. The main content area is divided into several sections:

- FLSA**: FLSA Indicator: (None) (dropdown), Work Period: (calendar icon)
- Social Security Name**: First: Samuel, Middle: J, Last: Bradford, Suffix: (empty)
- Electronic W-2 Consent**:  Employee Consent, Capture Date: 05-NOV-2011, Updated By: HRISUSR
- I9**: Form Indicator: Received (dropdown), Date: 01-SEP-2011 (calendar icon), Expiration Date: (calendar icon)
- California Pension**: Current Membership Status: (None) (dropdown)
- 1042S**: 1042S Recipient: (None) (dropdown)
- IPEDS**: IPEDS Primary Function: (None) (dropdown),  IPEDS Medical or Dental Reporting,  IPEDS reporting - employee paid with Soft Money

## Steps

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

1. Click the United States Regulatory tab.
2. Note: The U.S. Regulatory Information window collects data for use in **FLSA, I-9, W-2** and **1042-S** reporting.
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 **I**nstitutional **P**ost-**S**econdary **E**ducation **D**ata **S**ummary.
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 (PEAFACT) 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 PEAFACT, and faculty actions cannot be tracked.

## Banner form

The screenshot shows a web browser window titled "Faculty Action Tracking PEAFACT 8.0 (UDCSysT)". The form displays the following information:

- ID:** 88
- Name:** Eugene Victor Adams
- Status:** Active

---

**General**

- Primary Activity:** Instructional
- Primary Discipline:** [Empty dropdown]
- Institution Credit:** [Empty text box]
- Faculty Type:** [Empty dropdown]
- Faculty Compensation Level:** [Empty dropdown]
- Birth State or Province:** [Empty dropdown]
- Academic Title:** Provost/VP Academic Affairs
- Emeritus Status
- Terminal Degree
- AAUP Member

**Original Appointment**

- Begin Date:** [Empty date picker]
- End Date:** [Empty date picker]
- User ID:** RHOUCK
- Activity Date:** 09-APR-2008

## 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

Employee Status Change PEAESCH 8.4

ID: A00010809 Brian F Bell  
Action: Leave All Records  
Last Paid Date: 30-APR-2010  
Personnel Date: 01-MAY-2010

Leave Reason: SB Sabbatical  
Leave Begin Date:

Job Deduction Encumbrance

Position: F99998 Suffix: 00 Job Title: Professor Job Type: Primary  
Job Begin Date: 03-AUG-2009 Payroll ID: MN Monthly  
Current Effective Date: 01-APR-2010 Last Paid Date: 30-APR-2010  
Status: Leave without Pay, with Benefits

Job Assignment Change  
Effective Date: Personnel Date: Status: Reason:

## 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 (PTRJCRE).

29. Click the **Save** icon.

30. Click the **Exit** icon.

# Querying Job Records

## Introduction

The Job Change Detail Display Form (PEAJCDD) 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

Job Changes Detail Display PEAJCDD 8.3

ID: A00010809 Brian F Bell      Last Paid Date: 31-MAR-2010

Position: F99999      Suffix: 01

Query From Date: 01-JUL-2010      Query To Date: 30-DEC-2010      Query Type: Job Effective Date

---

**Jobs**

Personnel Date	Effective Date	Title	Employee Class	Status
>> 01-JUL-2010	01-JUL-2010	Assistant Professor	08 Permenant Full-time Faculty	Active

---

**Compensation**

Personnel Date	Change Reason	Description	Comment	Hourly Rate	Appointment			Assigned Salary
					Job FTE	Percent	Annual Salary	
01-JUL-2010	00002	Cost of Living Adjustment	<input type="checkbox"/>	28.85	1	100.00	60,000.00	5,000.00
01-JUL-2010	00002	Cost of Living Adjustment	<input type="checkbox"/>	28.85	1	100.00	60,000.00	5,000.00
01-JUL-2010	00002	Cost of Living Adjustment	<input type="checkbox"/>	28.85	1	100.00	60,000.00	5,000.00
			<input type="checkbox"/>					

## 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

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## Question 1

What functions can be done within the Employee Status Change Form, PEASCH?  
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

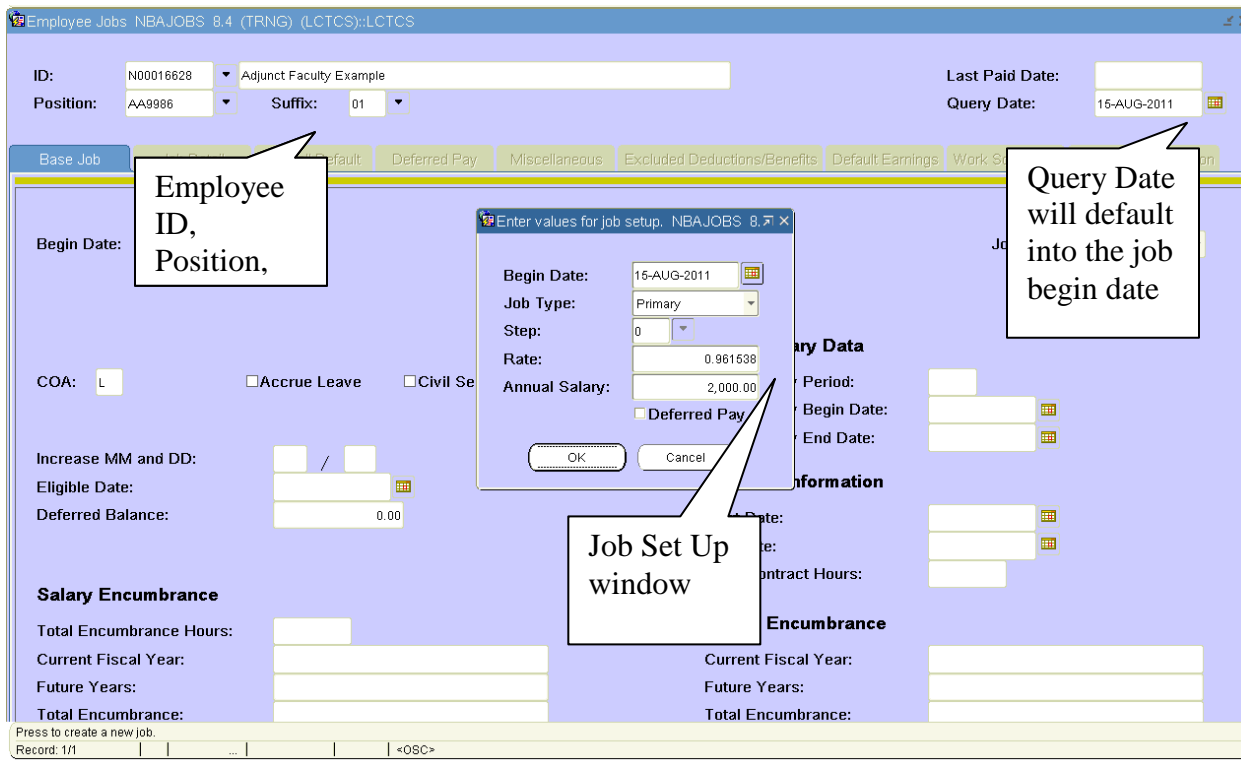


## **Special Processing Notes: Adjunct Faculty Assignments**

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

Employee Jobs NBAJOBS 8.4 (TRNG) (LCTCS)::LCTCS

ID: N00016628 Adjunct Faculty Example Last Paid Date:

Position: AA9986 Suffix: 01 Query Date: 15-AUG-2011

Base Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded Deductions/Benefits Default Earnings Work Schedules Job Labor Distribution

Effective Date: 15-AUG-2011

Personnel Date: 15-AUG-2011

Status: Active

Title: 500170-ADJUNCT FACULTY

Job FTE: 1.000

Appointment Percent: 100.00

Encumbrance Hours:

Encumbrance Indicator: Annual Salary

Hours per Day: 8.00

Employee Class: 43 Uncl Adjunct Faculty Salary

Leave Category:

Change Reason:

Employer Code: LC LCTCS

**Pay Plan**

Group: 2012 Grade: UC

Table: UC Step: 0

**Compensation**

Rate: 0.961538

Hours per Pay: 80.00

Assign Salary: 76.92

26.0

26.0

Annual Salary: 2,000.00

Note: Compensation Information is based on 26 pays.

Personnel Change Date, Format 'DD-MON-YYYY':

Record: 1/1 <OSC>

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

2 Character Code	Short Descript	Long Description	Payroll Understanding of Definition for Reporting	Salaried/Hourly
<b>PTRECLS_CODE</b>	<b>PTRECLS_SHORT_DESC</b>	<b>PTRECLS_LONG_DESC</b>		<b>PTRECLS_SALARY_IND</b>
A1	ASFTBE00	Affiliated Service FT BE	S	H
00	<b>CLFTEXS</b>	Classified FT Exempt	Classified Regular FT, Salary Exempt, Eligible for Comp Lv or Straight Paid OT; Paying into retirement and/or FICA	S
01	<b>CLFTNEXS</b>	Classified FT Non Exempt	Classified Regular FT, Salary Non Exempt Salary, eligbile for Comp Time Straight, and Comp 1.5; Paying into retirement and/or FICA	S
02	<b>CLFTRESS</b>	Classified FT Temp Restricted	FT, Restricted (Temp) Salary Non-Faculty Appointment, No Benefits & Retirement	S
13	<b>CLPTEXH</b>	Classified PT Exempt	Classified Regular Exempt Part-Time eligbile for benefits and retirement prorata. Non Faculty	H
10	<b>CLPTNEXH</b>	Classified PT Non Exempt	Classified Regular Nonexempt Part-Time eligbile for benefits and retirement prorata. Non Faculty	H
11	<b>CLPTRESH</b>	Classified PT Temp Restricted	PT, Restricted (Temp) hourly Appointment, No benefits paying subject to FICA	H
20	<b>UNFTREGS</b>	Unclassified FT Regular	FT/REG Exempt Non-faculty unclassified "TO" position.	S
21	UNFTTMPH	Uncl FT Temporary Hourly	Non-faculty FT/Temp Hourly - no benefits except retirement.	H
22	UNFTTMPS	Uncl FT Temporary Salary	Non-faculty FT/Temp Salary - no benefits except retirement,	S
30	<b>UNPTREGH</b>	Unclassified PT Regular	PT/Reg Non-Faculty eligbile for benefits and retirement prorata	H
31	<b>UNPTTMPH</b>	Unclassified PT Temporary	PT/Temp Non Faculty, no benefits , hourly	H

32	DA41D1H	Deleg Authority 41d1 Hourly	Appointing authority hire a Temporary Hourly Non Faculty Ex. registration, tutors; janitors or waiting on approval for hire.	H
33	DA41D1S	Deleg Authority 41d1 Salary	Appointing authority hire a Temporary Salary Non Faculty Ex. registration, tutors; janitors or waiting on approval for hire.	S
40	<b>UN9MFAS</b>	Unclassified 9 month Faculty	9ME 20 or 26 pay faculty, with benefits Contract	S
41	<b>UN12MFAS</b>	Unclassified 12 month Faculty	REG/FT 12 Month Faculty eligible for benefits annual and sick leave	S
42	UNADJFAH	Uncl Adjunct Faculty Hourly	Adjunct Hourly. No leave. Possible Retirement	H
43	UNADJFAS	Uncl Adjunct Faculty Salary	Adjunct Salary. No leave. Possible Retirement	S
50	<b>SWCOLLH</b>	Student Worker College	Student Worker College Work Study Exempt	H
51	<b>SWFWSH</b>	Student Worker Fed Work Study	Student Worker Fed Work Study	H
52	<b>SWFICAH</b>	Student Worker FICA	Student Worker paying FICA or fall below full time?	H
60	<b>GCFTEXS</b>	Classified Grant FT Exempt	Classified Regular Grant FT, Salary Exempt, Eligible for Comp Lv or Straight Paid OT; Paying into retirement and/or FICA	S
61	<b>GCFTNEXS</b>	Classified Grant FT Non Exempt	Classified Grant Regular FT, Salary Non Exempt , eligbile for Comp Time Straight, and Comp 1.5; Paying into retirement and/or FICA	S
62	<b>GCPTEXH</b>	Classified Grant PT Exempt	Classified Grant Regular Exempt Part-Time eligible for benefits and retirement prorata. Non Faculty	H
63	<b>GCPTNEXH</b>	Classified Grant PT Non Exempt	Classified Grant Regular Nonexempt Part-Time eligbile for benefits and retirement prorata. Non Faculty	H
64	<b>GUFREGS</b>	Unclassified Grant FT Regular	FT/REG Grant Exempt Non-faculty unclassified	S

65	GUFTTMPH	Uncl Grant FT Temp Hourly	Non-faculty Grant FT/Temp Hourly - no benefits except retirement.	H
66	GUFTTMPS	Uncl Grant FT Temp Salary	Non-faculty Grant FT/Temp Salary - no benefits except retirement.	S
67	<b>GUPTREGH</b>	Unclassified Grant PT Regular	PT/RegGrant Non-Faculty eligbile for benefits and retirement prorata	H
68	<b>GUPTTMPH</b>	Unclassified Grant PT Temporary	PT/Temp Non Faculty, no benefits , hourly.	H
69	<b>GU9MFAS</b>	Uncl Grant 9 month Faculty	Grant 9ME 20 or 26 pay faculty, with benefits Contract	S
70	<b>GU12MFAS</b>	Uncl Grant 12 month Faculty	REG/FT Grant 12 Month Faculty eligible for benefits annual and sick leave	S
71	GUADJFAH	Uncl Grant Adj Faculty Hourly	Grant Adjunct Faculty Hourly. No leave. Possible Retirement.	H
72	GUADJFAS	Uncl Grant Adj Faculty Salary	Grant Adjunct Faculty Salary. No leave. Possible Retirement.	S
90	<b>PERDIEMH</b>	Per Diem	Board Members	H
EH	EXSERVH	Extra Service Assig Hourly	Additional duty pay - Hourly. This class is used only on the assignment not on the employee.	H
ES	EXSERVS	Extra Service Assig Salary	Additional duty pay - Salary. This class is used only on the assignment not on the employee.	S
OV	<b>OVRLOADS</b>	Overload Assignment Contract	Faculty overload pay - Contract. This class is used only on the assignment not on the employee.	S
DC	Default	Default Code		

## Forms Job Aid FIX

Form	Full Name	Use this Form to...
NBAJOBS	Employee Jobs Form	assign a job to the new employee using the new person record and new position and position class in the system.
PEAEMPL	Employee Form	establish information about an employee's terms of employment.
PEAESCH	Employee Status Change Form	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.
PEAFAC	Faculty Action Tracking Form	display information on faculty actions including primary activity, appointment dates, birth state or province, institution credit, and AAUP membership.
PEAHIRE	New Hire Form	establish an employee in the system.
PEAJCDD	Job Change Detail Display Form	view changes to an employee's job record.
PEAREVW	Employee Review Form	collect data about a specified employee's performance reviews.