Grad Assistant/Fellow/Scholar Change Form (GRAD)

The Grad Assistant/Fellow/Scholar Change (GRAD) form is used to:

- **Make changes to a current Grad Assistant, Fellow or Scholar's:**
  - Rank
  - Grade
  - Appointment Type
  - Appointment Salary
  - Work Location
  - Home Budget
  - Pay Budget

> **Note:**
A TRMN must be processed on either their current appointment (if the end date hasn't already occurred) before processing the NAPP. If you are only changing the Pay Budget, use the NEWP form.

- **Reappoint a current Grad Assistant, Fellow or Scholar.**
  - Any of the changes mentioned above can be done in conjunction with the reappointment.
  - The reappointment must occur within 18 weeks after the previous appointment ends.

- **Transfer a Non-Academic or Academic (FT2 or WAG) into a Grad Assistant, Fellow or Scholar position.**
  - Use the NAPP to place STN, FT1, FTM appointments into a Grad Assistant, Fellow or Scholar positions.
The following screens and functions are available within this documentation:

- **Introduction to the GRAD Form**
  - Summer Appointments
  - Structure of the Form

- **Approval Cycle of the GRAD and GRAZ**
  - When the form is a GRAD
  - When the form changes to a GRAZ

- **What is Needed to Complete the GRAD Form**
  - Sending Area Needs
  - Receiving Area Needs

- **Use of the GRAD Form**
  - Net-Pass Activity Table Screen
  - AIS Program Services Screen
  - IBIS Functions Screen
  - Cover Screen - Sending Area Information
  - Receiving Area Information
  - Grad Assistant/Fellow/Scholar Changes Screen
  - Paycheck Adjustment Screen
  - New Pay Information Screen
  - Notepad Screen
  - Cover Screen After Form is ADDed

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**Introduction to the GRAD Form**

**Summer Appointments**

1. If the GRD, FEL or SCH is being hired into a FT2 or WAG appointment for Summer, use an NAPP to appoint them as a FT2 or use a WAPP to appoint them as WAG indicating that the summer appointment is PRIMARY.

> **Note:**
If your administrative area does not use the WAPP to hire WAG appointments, skip this
2. If the GRD, FEL or SCH is hired as a WAG (with or without a WAPP form), complete a W-4 card and use the WAGC (Wage Timecard Form) to pay the employee. The WAPP form will not initiate a pay for the WAG employee.

3. Use the GRAD form to reappoint these employees into their GRD, FEL or SCH appointments for Fall.

> Note:
If you used a WAPP to hire these employees as a WAG in the summer, a pop-up window will display all appointments that have occurred within the 18-week break-in-service guideline. If a GRAD, FEL or SCH is being reappointed by a different department or administrative area, the Sending Area must indicate Y (yes) at Is This a Reappointment?

Simply mark the appropriate GRD, FEL or SCH appointment with an X to reappoint them for Fall.

Reminder:
The Is This a Reappointment question indicates this is a reappointment to the University, not necessarily a reappointment to a department.

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**Structure of the Form**

The Sending Area:

- is the area where the employee currently resides.
- is where current information on the employee will be entered.
- is where the new administrative area is indicated.
- if the new administrative area is the same as the current administrative area and the employee is not leaving the current department, the Sending Area also needs to complete the Receiving Area information.

The Receiving Area:

- is the area where the employee will be residing.
- is where new information on the employee will be entered.
The **Table of Contents:**

- indicates what screens could be included in the GRAD form.
- indicates the screens that are optional with an "O".
- indicates what screens were accessed with an "X".

The **Current** side:

- is the area where the employee currently resides.
- is the current information on the employee.

> **Note:**
> If the new administrative area is *different* from the current administrative area or the employee is *leaving* the current department, the Sending Area will only be permitted to answer the Paycheck Adjustment question.

The **Change To** side:

- is the area where the employee will be residing.
- is where new information on the employee will be entered.

> **Note:**
> If the new administrative area is the *same* as the current administrative area and the employee is *not* leaving the current department, the Sending Area also needs to complete the Receiving Area information.

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**Approval Cycle of the GRAD and GRAZ**

**When the form is a GRAD**

The Sending Area will enter:

- the SSN
- the New Admin Area
- is person leaving Curr dept?
- is this a reappointment?

Press **ENTER**.
If the New Admin Area is the same as the Curr H Admin Area and the person is not leaving the current department, the Sending Area will then complete the Receiving Area information.

If the Sending Area is different than the Curr H Admin Area or the person is leaving the current department, the Sending Area can only answer the Paycheck Adjustment question.

The form will go through the Current Department's approval path as a GRAD form and go to the central office to be processed.

**When the form changes to a GRAZ**

The Sending Area will enter:

- the SSN
- the New Admin Area
- is person leaving Curr dept?
- is this a reappointment?

Press ENTER.

If the Sending Area is different than the Curr H Admin Area or the person is leaving the current department, the Sending Area can only answer the Paycheck Adjustment question.

The form will go through the Sending Area's approval path as a GRAD form and will automatically submit to the Receiving Area's first default approver on the highest mnemonic or department as a GRAZ form. This person will type CHG at **Form Action**, enter the new home budget and other information and press **PF12**.

The GRAZ form will then resubmit to the approval path of the mnemonic (department) associated with the new home budget. The GRAZ form will go through this approval path and on to the central office to be processed.

> **Note:**
If the Admin Area is the same but the person is leaving the current department, the form will go through the same process as the GRAZ form but will bypass the Financial Officer on the GRAD form. The Financial Officer will then approve the GRAZ form.
What is Needed to Complete the GRAD Form

Sending Area Needs:

- To obtain the new administrative area number from the Receiving Area.
- To obtain the Change Effective Date that the Receiving Area will be entering to help determine if this is a reappointment to the University.
- To determine if the employee is transferring in the middle of a pay period. If so, the Paycheck Adjustment screen may need to be completed.
- An explanation is needed in the Notepad when if the employee is transferring to a new Admin area stating where the employee is transferring to and the effective date of the transfer.

Receiving Area Needs:

- The Effective Date of the change.
- Make sure the I-9 is current.

Use of the GRAD Form

NET-PASS Activity Table Screen

- Select CCOM from the Net-Pass Activity Table to enter the production environment.
Com-Pass (AIS Program Services) Screen

- Select IBIS Admin Menus at the Com-Pass screen.
IBIS Functions Screen (M1M1)

06/13/97
09:49:38.9

INTEGRATED BUSINESS INFORMATION SYSTEM

Any of the functions included in this system can be invoked by entering the corresponding function code on the command line next to 'NEXT FUNCTION:'. The following functions are available:

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORM</td>
<td>Help Selecting HRS Forms</td>
</tr>
<tr>
<td>M2AH</td>
<td>IBIS Adhoc Functions</td>
</tr>
<tr>
<td>M2AS</td>
<td>EASY Elec. Appr. System</td>
</tr>
<tr>
<td>M2BG</td>
<td>Budgeting System</td>
</tr>
<tr>
<td>M2FN</td>
<td>Financial System</td>
</tr>
<tr>
<td>M2FS</td>
<td>Facilities System</td>
</tr>
<tr>
<td>M2HR</td>
<td>Human Resources System</td>
</tr>
<tr>
<td>M2PA</td>
<td>Payroll System</td>
</tr>
<tr>
<td>M2PI</td>
<td>Property Inventory</td>
</tr>
<tr>
<td>M2PR</td>
<td>Purchasing System</td>
</tr>
<tr>
<td>M2UR</td>
<td>Vendor System</td>
</tr>
<tr>
<td>BAMS</td>
<td>Budget Planning: BudAuto</td>
</tr>
<tr>
<td>M2IM</td>
<td>Inventory Management</td>
</tr>
<tr>
<td>CODE</td>
<td>Codeset Maint. System</td>
</tr>
<tr>
<td>M2NC</td>
<td>Nat Conn. Applications</td>
</tr>
<tr>
<td>M2PE</td>
<td>Pay &amp; Effort Functions</td>
</tr>
</tbody>
</table>

NEXT FUNCTION: grad_1

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP MENU CMPS END . . . . . . . . . . KEYS PRNT .
1. At Next Function, type GRAD.

Press Enter.

A blank GRAD form will appear, ready to be completed.

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**Cover Screen — Sending Area Information**

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1. Enter the Social Security Number.

2. Enter the **New Admin Area** number. This is the administrative area of the employee's *new* or *updated* position.

**Hint:**
PF1 provides a list of administrative area numbers.

**> Note:**
If the employee's position is only being updated or if the employee is changing positions but not changing administrative areas, enter the *current* administrative area number.
3. Answer the **Is person leaving Curr dept?** question with a "Y" (yes) or an "N" (no).

   - If the **New Admin Area** is different than the **Curr H Admin Area** always enter a "Y" (yes).
   - If the **New Admin Area** is the same as the **Curr H Admin Area** but the employee's new or updated position is in a different department (mnemonic), enter a "Y" (yes).
   - If the employee's new or updated position is in the same **Curr H Admin Area** and **Current department**, enter an "N" (no).

   **Note:**
   By entering an "*" in this field and pressing **Enter**, a pop-up "help" window will appear providing a list of budgets associated with the employee's current mnemonic to assist in determining if the employee is leaving the current department.

4. Answer the **Is this a reappointment?** question. This field is used when an employee is being reappointed to the University, *not* necessarily to the same administrative area.

   - If the employee's current appointment end date is *greater than* the **Receiving Area's Change Effective Date**, enter an "N".
     - **Example:**
       The employee's current appointment end date is 5/31/1997 and the **Change Effective Date** on the GRAD is 4/1/1997.

   - If the employee's current appointment end date is *less than* the Receiving Area's change Effective Date, Enter a "Y".
     - **Example:**
       The employee's appointment end date is 5/31/1997 and the Change Effective Date on the GRAD is 7/1/1997.

Press **Enter** to display the **Curr H Admin Area** and **Position #**.

   **Note:**
   If there are other forms in the system that have not yet processed for this employee, a pop-up window will appear listing any forms that are in the approval cycle for this employee.
If the **New Admin Area** is *different* than the **Curr H Admin Area** or a "Y" (yes) is entered at **Is person leaving Curr Dept?**, press **PF8** to continue to complete the **Paychk Adj?** (paycheck adjustment) question. See the Paycheck Adjustment section of this document for information on completing the paycheck adjustment screen. The GRAD form will go through the Sending Area's approval path. The form will automatically become a GRAZ form and the **Receiving Area** will complete the **Chng Eff Dte**.

If the **New Admin Area** is the *same* as the **Curr H Admin Area** and an "N" (no) is entered at **Is person leaving Curr dept?**, complete the **Receiving Area** information.

### Receiving Area Information

1. Enter the **Chng Eff Dte** (change effective date).

2. To see if there are any forms that have already been added, submitted or are in the approval cycle for this employee, enter a "Y" (yes) at **Other Forms Awaiting?** and press **ENTER**. If there are other forms awaiting action, they may have an impact on how the data on your form is updated.

> **Note:**
> When completing the form, if there are other forms in the system that are not yet processed for this employee, a pop-up window will appear when **ENTER** or **PF8** is
pressed to go to the next screen. This pop-up window will list any forms that are in the approval cycle for this employee.

Press **ENTER** to display the Chng Eff PPd#.

Press **PF8** to continue.

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**Grad Assistant/Fellow/Scholar Changes Screen**

1. At **Type Chng**, indicate the type of appointment that the employee is going into on the Change To side. The appointment types are:

<table>
<thead>
<tr>
<th>G</th>
<th>Graduate Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>Fellowship</td>
</tr>
<tr>
<td>S</td>
<td>Scholarship</td>
</tr>
</tbody>
</table>

- Enter a "Y" at **System Pos?** (system position).
All Grad Assistant, Fellowship and Scholarship appointments will have a position number that is system-generated once the form is processed.

- Leave **Pos#** (position number) blank since you are indicating that the position will be system-generated.

- Enter a **Y** at View I-9 Info? if you would like to see the employee's I-9 information. The default value for this field is **N** (no).

> **Note:**
For this particular field, you have the option of changing the **N** to a **Y** at this time or it can be changed after the Change To information has been completed. (See #15 in the next section of this document.)

Press **ENTER** to complete or update the Change To information.

5. A "**Y**" (yes) can be entered at Semester Info?, if information is needed on the begin and end dates of a specific semester.

6. Enter the HBud (home Budget) if applicable.

> **Note:**
If this is a GRAD form, the HBud can only be changed to a budget that is within the same department or approval path as the current HBud.

If this is a GRAZ form, once the HBud is entered, the form will be resubmitted to the approval path associated with that budget. See "When a Form Changes to a GRAZ" for more information.

7. Enter the Rank if it is different than what is currently indicated.

> Note:
Press PF1 to find the appropriate code for each rank.

8. At Grade, enter a grade if the Appt Type is GRD (grad assistant). The Grade range is from 09 to 19.

> Note:
This field is not modifiable for Fellowships and Scholarships.

9. At Scnd Title (Secondary Title), enter the title of the employee. This field will default to the employee's current title if the appointment type is not changing.

> Note:
This field is not modifiable if the appointment type is GRD (grad assistant) but will be system-generated based on the Rank that is entered.

10. Enter the Appt End Dte (appointment end date) if applicable.

> Note:
If a "Y" was entered at Is this a reappointment?, a new Appt End Dte must be entered.

If an "N" was entered at Is this a reappointment?, the Appt End Dte cannot be changed.

11. At Equiv Wrk% (equivalent work percentage), enter the estimated percentage of time the employee will work during the appointment. This field will default to the Current information if the appointment type is not changing.

> Note:
This field is protected for GRD (grad assistant) and will be system-generated based on the Rank.
12. The **Pos FTE** (Position FTE) will be system-generated based on the **Equiv Wrk%** or the appointment length but can be modified if the appointment type is **SCH** or **FEL**.

13. The **WkLoc** (work location) is the campus location or satellite location where the employee is physically located. This field has not yet been defined and is optional.

14. Enter the **Appt Sal** (appointment salary) for this employee. The appointment salary is the amount listed in the offer letter.

> **Note:**
A **$0 amount** in the Appointment Salary field is acceptable if you are appointing a Postdoctoral Fellow or Scholar with no appointment salary. This type of an appointment might be funded directly from an outside agency and therefore would not have an appointment salary from Penn State.

When a "0" is entered in the **Appointment Salary** field on the **GRAD** form, you will receive the warning "**Please explain $0 appt sal in Notepad**". Press **PF8** again to bypass the warning message.

You **must** provide an explanation in the Notepad. **If an explanation is not provided, the form will be REJected by the Payroll Office.**

15. Enter a "**Y**" at **Paychk Adj?** (paycheck adjustment) if an adjustment needs to be made to the employee's regular paycheck.

16. Enter a **Y** at **View I-9 Info?** if you would like to see the employee's I-9 information. The default value for this field is **N** (no).

Press **PF8** to continue.

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### Paycheck Adjustment Screen

The Paycheck Adjustment screen will appear if a "**Y**" was placed at **Paycheck Adj This Appt?** on the **Grad Assistant/Fellow/Scholar Changes** screen.
This screen is needed if:

- The employee is receiving retroactive pay.
  
  **Example:**
  
  The employee missed a salary increase and needs to have the retroactive amount included in the regular paycheck.

To complete this screen for retroactive pay:

1. At the **Present Base Rate Pay** line, enter the employee's monthly rate at **Rate, M** (monthly) at **Unit** and the employee's regular paycheck amount at **Amount**.

2. At the **Retroactive Pay** line, enter the retroactive amount in the **Amount** column.

Press **Enter** and the **Total** will reflect the amount the employee will receive for the specified Pay Period #.

Press **PF8** to continue.

- The employee is **transferring** to a different department or administrative area in the
middle of a pay period.

To complete this screen for a transfer:

1. At the **Present Base Rate Pay** line, the *Sending Area* enters the employee's **monthly rate** at **Rate, M** (monthly) at **Unit** and the **amount** the employee will receive from the *Sending Area* at **Amount**.

Press **Enter** and the **Total** will reflect the amount the employee will be paid from the *Sending Area* for the specified Pay Period #.

Press **PF8** to continue.

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**New Pay Information Screen**

The **New Pay Screen** will always appear.

1. **At Pay Budget**, enter the budget that the employee is going to be paid from. If you have any questions, you should contact your Financial Officer. Since **GRD**, **FEL** and **SCH** positions are system-generated, the pay budget can be any salary budget within that
administrative area.

> **Note:**
If the employee is being paid from more than one budget, they must be paid from the clearing account.

2. At **Pay Fund**, enter the fund that the employee is going to be paid from.

3. If the pay period amount is to be **charged to the next fiscal year**, enter the pay period numbers at **PrePaid #s**.

4. At **#PPds** (number of pay periods), enter the number of **complete** pay periods that remain in the appointment (do **not** include any partial pay periods).

> **Note:**
If this is for a retroactive appointment, do not include missed pay periods.

5. Enter the **Amnt/PPd** (amount per pay period). This is the amount that the employee will be paid for each **full** pay period.

The **Partial PPds** (partial pay periods) section needs to be completed if:
● The employee is receiving retroactive pay.

  ○ Example:
  The employee missed a salary increase and needs to have the retroactive amount included in the regular paycheck.

To complete this screen for retroactive pay:

1. At First PPd #, enter the pay period number that the employee will be paid this amount.

2. At Amnt, enter the employee's monthly rate plus the retroactive pay. This amount should be the same as the Total on the Paycheck Adjustment screen.

   Press PF8 to continue.

● The employee is transferring to a different department or administrative area in the middle of a pay period.

To complete this section for a transfer:

1. At First PPd #, enter the pay period number that the employee will be paid this amount.

2. At Amnt, enter the amount the employee will be paid from the Receiving Area.

   Press PF8 to continue.

● The employee's appointment end date is in the middle of a pay period.

To complete this section for a middle appointment end date:

3. At Last PPd #, enter the last pay period number that the employee will be paid.

4. At Amnt, enter the amount of the employee's last pay.

   Press PF8 to continue.
The Notepad Area is where you can enter any information that other approvers (including OHR & Payroll) will need to know in order to expedite processing the form.

Press **PF12** to **ADD** the form.

Enter **SUB** (submit) at Form Action and press **PF12**. The form will route through the department's approval path.

> **Note:**
> When submitting the form, you will need to enter a userid at the **Next Approver** field on the Notepad screen if the first approver is not a default approver. Pressing **PF4** will display the Approval path for the routing budget used in the form.

If the form needs to be approved by an **Off Path Approver** (OPA) after the form has been **SUBmitted**:

1. Type **FWD** in the **Form Action**.

2. Enter the userid of the off path approver.
3. Press **PF12**.

Once the off path approver approves the form, it will automatically return to your form queue and will appear in your Browse Waiting ForMs (BAFM) or Process Awaiting ForMs (PAFM). At that time, you can APProve the form and it will continue routing through the department's approval path.

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**Cover Screen After Form is ADDed**

Once the form is added, an **X** is placed under the **Used** column beside the screens that were accessed during the ADD action in the **Table of Contents** section.

1. If you would like to go directly to one of the screens marked with an **X** under the **Used** column, place another **X** under the **Mark** column beside the screen you want to view and press **PF8**. This will take you directly to the screen you indicated.

2. If the **Chng Eff Date** needs to be changed, place a **Y** (yes) at **Enter "Y" to modify Chng Eff date** and press **ENTER**. This will allow you to modify the change effective date of the form.

3. To see if there are any forms already added, submitted or in the approval cycle for this employee, enter a **Y** (yes) at **Other Forms Awaiting Action?** and press **ENTER**. If there are other forms awaiting action, they may have an impact on how the data on your form is updated.

> **Note:**
When adding the form, if there are other forms in the system that are not yet processed for this employee, a pop-up window will appear once the **ENTER** or **PF8** is pressed to go to the next screen. This pop-up window will list any forms that are in the approval cycle for this employee.

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Last Revised: 07/22/2003