

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.
-

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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

step.

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.

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.

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.

09:45:49 Term TCP01009 LSX32702 NET-PASS Userid DAM3 06/13/97

-- NET-PASS Activity Table --

Level Id	Application Name	Application Description	Rcv. Time
PF01	MAIL	EMC2 Electronic Mail	
PF02	TS0D	TS0/E - IP02	
PF03	ACOM	ISIS-A	
PF04	BCOM	ISIS-B	
PF05	CCOM	IBIS	
PF06	TESTAIS	Test COM-PLETE	
PF07	IMS	IMS Data Base Access	
PF08	ROSCOE	ROSCOE Editor	
PF09	RMDS	Report Management Dist System	
PF10	MSPSU		

PASS Character : ~

Suspend Key : PF12

Jump Key : PF11

NET-PASS COMMAND:

OAS SUPPORT CTR - 814 863-2276

Max.Sess.: 10

Printer : PF24

TCP5 103P

Com-Pass (AIS Program Services) Screen

- Select **IBIS Admin Menus** at the **Com-Pass** screen.

09:47:16

TID 3909

CCOM

User DAM3

06/13/97

-- COM-PASS --

USTS

Suspended Programs

Program Services

Programs	Name	C Level	PF	Service Description	Programs	ID	PF
		1		LOGOFF	L0	A	01
		2		NATURAL2	N2226	B	02
		3		HELP FACILITY	UHELP	C	03
		4		INSIGHT	INS226	D	04
		5		MESSAGE SWITCHING	UM	E	05
		6		SUPPORT SYSTEM MENU	SUPMEN	F	06
		7	→	IBIS ADMIN MENUS	IBIADM	G	07
		8		UQ UTILITY	UQ	H	08
		9					

Enter Input:

HELP ?

LU Name: UT0003
Devtype: 3279 VS
Lines : 24
Columns: 80

HC TID: 3904
Device: UP0003
Key:

Recall: NO
Suspend: < NO
Jump: NO NO

Language: 001
Case : Upper

IBIS Functions Screen (M1M1)

06/13/97
09:49:38.9

INTEGRATED BUSINESS INFORMATION SYSTEM

M1M1
DAM3

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:

FUNCTION	DESCRIPTION	FUNCTION	DESCRIPTION
FORM	Help Selecting HRS Forms	M2PI	Property Inventory
M2AH	IBIS Adhoc Functions	M2PR	Purchasing System
M2AS	EASY Elec. Appr. System	M2VA	Vendor System
M2BG	Budgeting System	BAMM	Budget Planning: BudAuto
M2FN	Financial System	M2IM	Inventory Management
M2FS	Facilities System	CODE	Codeset Maint. System
M2HR	Human Resources System	M2NC	Nat Conn. Applications
M2PA	Payroll System	M2PE	Pay & Effort Functions

NEXT FUNCTION: grad_1

PREV MENU: NONE

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.

Cover Screen — Sending Area Information

```
PLEASE ENTER EMPLOYEE'S NEW ADMIN AREA
06/13/97          HUMAN RESOURCE CHANGE SYSTEM          GRAD
09:52:39.6       GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES  DAM3

Form Action: ADD  Document #:          Unit: ENT      Confidential(Y/N): Y
                                           Document Status:

      KEY INFORMATION                                TABLE OF CONTENTS
-- Sending Area --
      SSN: 914 - 01 - 0081 1
      Curr H Admin Area: 004
      Position #: 29949-000
      New Admin Area: 004 2
      Is person leaving Curr dept? n 3
      Is this a reappointment? n 4
-- Receiving Area --
      Semester Info? N
      Chng Eff PPd#:  _
      Chng Eff Dte:  _ / _ / _

Name: TYSON, INGRID S
Other Forms Awaiting Action (Y/N)? N
      0 = Optional Screens

Next Function: _____ (menu, keys, end)
```

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

```

PLEASE COMPLETE 'RECEIVING AREA' INFO, THEN PRESS <ENTER>
06/13/97          HUMAN RESOURCE CHANGE SYSTEM          GRAD
09:55:06.8       GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES  DAM3

Form Action: ADD  Document #:          Unit: ENT      Confidential(Y/N): Y
                                     Document Status:

      KEY INFORMATION                                TABLE OF CONTENTS
-- Sending Area --
      SSN: 914 - 01 - 0081
      Curr H Admin Area: 004
      Position #: 29949-000
      New Admin Area: 004
      Is person leaving Curr dept? N
      Is this a reappointment? N
-- Receiving Area --
      Semester Info? N
      Chng Eff PPd#:  —
      Chng Eff Dte: 05 / 01 / 1996 1

Name: TYSON, INGRID S
Other Forms Awaiting Action (Y/N)? N 2
0 = Optional Screens

Next Function: _____ (menu,keys,end)
  
```

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.

Grad Assistant/Fellow/Scholar Changes Screen

```

RESPOND TO BOTH QUESTIONS & ENTER POS# IF APPLICABLE, & PRESS <ENTER>
06/13/97          GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES          GRAD
10:02:52.9                               DAM3

Chng Eff Dte: 05/01/1996

SSN: 914-01-0081          Name: TYSON, INGRID S
-----
Type Chng (G/F/S): g 1          System Pos (Y/N)? y 2          Semester Info (Y/N)? N
          CURRENT                                CHANGE TO:
HAdmn/Pos#/Type: 004 29949-000 S          004 - - - 3
HBud/HR Rep #: 04-004-13 UP 020          04 - 004 - 13 UP 020
Appt Type/Pr/Se: GRD P          GRD P
Rank/Grade: M20 09          M20 09
Scnd Title: GRAD ASST 1/2          GRAD ASST 1/2
Appt Beg/End Dte: 08/20/1995 05/10/1996          08 / 20 / 1995 05 / 10 / 1996
Equiv Wrk%/Pos FTE: 33.0 0.330          _33.0 0.330
Work Loc: UP-          UP -
Appt Sal: 4590.00          _4590.00
Paycheck Adj This Appt (Y/N)? _          --- Pos Sal Change: ---
          Reason Amount OR %
Budget Dist Chng (Y/N)? N          -
View I-9 Info?: N 4          -
          -
    
```

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

G	Graduate Assistant
F	Fellowship
S	Scholarship

- 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.

```

PF5=TOP, PF6=BOTTON, PF7=BACKWARD, PF8=FORWARD, PF12=PROCESS
06/13/97          GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES          GRAD
09:58:01.3                               DAM3

                Chng Eff Dte: 05/10/1996

                SSN: 914-01-0081          Name: TYSON, INGRID S
-----
Type Chng (G/F/S): G          System Pos (Y/N)? Y          Semester Info (Y/N)? 5
                CURRENT                                CHANGE TO:
HAdmn/Pos#/Type: 004 29949-000 S          004 29949 - S
HBud/HR Rep #: 04-004-13 UP          020          04 - 004 - 13 UP 6 020
Appt Type/Pr/Se: GRD P          GRD P
Rank/Grade: M20 09          M20 7 10 8
Scnd Title: GRAD ASST 1/2          GRAD ASST 1/2 9
Appt Beg/End Dte: 08/20/1995 05/10/1996          08 / 20 / 1995 10 05 / 10 / 1996
Equiv Wrk%/Pos FTE: 33.0 0.330          _33.0 11 0.330 12
Work Loc: UP-          UP - 13
Appt Sal: 4590.00          4800.00 14
Paycheck Adj This Appt (Y/N)? N 15
-----
                Budget Dist Chng (Y/N)?: N
                View I-9 Info?: N 16
Reason          Pos Sal Change:          OR          %
-----
                -          -          -          -
                -          -          -          -
                -          -          -          -
    
```

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 **Equip 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 **Equip 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.

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.

06/13/97 10:10:06.1	GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES Paycheck Adjustment Screen	GRAD DAM3
SSN: 914-01-0081 HBud: 04-004-13 UP	Name: TYSON, INGRID S Jobd Ttl: GR AST 1/2	Status: ACT Grade: 09 Class: ACAD
Pay Period #: 12	Amnt/PPd:	Pay Budget/Fund: - - Appt Type: GRD
	#Wks #Days #Hrs	Rate/Unit Factor Amount
Present Base Rate Pay: ①	— — —	— — —
Holiday/Overtime/Othr:	— — —	— — —
Vacation/Earned:	— — —	— — —
Sick Allowance:	— — —	— — —
Holiday Comp:	— — —	— — —
Service (HY Only):	— — —	— — —
Comp Time:	— — —	— — —
Shift Differentl/Prem:	— — —	— — —
Time Off w/o Pay:	— — —	— (—)
Meal/Lodging/Both Ded:	— — —	— (—)
Military Reduction:	— — —	— (—)
Retroactive Pay: ②	— — —	— (—)
Overpayment Deduction:	— — —	— (—)
FOR PAYROLL USE ONLY: Fed Tax PPds: 0		Total:

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.

New Pay Information Screen

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

06/13/97 10:27:55.2	GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES New Pay Information	GRAD DAM3
Chng Eff Dte: 05/01/1996		
SSN: 914-01-0081	Name: TYSON, INGRID S	Class: ACAD
Home Budget: 04-004-13 UP	Job Desc Ttl: GRAD ASST 1/2	Grade: 10
HR Rep #: 020	Job Desc #: AM20-0010	Step: NA
H Admin Area: 004	Pos #/Pos Type: 29949-000 S	Rank: M20

Pay Period #: 12	Appt Type/Pr/Se: GRD P	Sal Plan: 35W
	Old Appt Sal: 4590.00	New Appt Sal: 4800.00
Pay Freq: GRAD	Pay Budget: 04 - 1 4 - 13 UP	Pay Fund: 2
	Check Sort: 099	PrePaid PPd #s: 3
----- Remaining Complete PPds -----		----- Partial PPds -----
# PPds: 4	Amnt/PPd: 5	First PPd #: ___ Amnt: _____
		Last PPd #: ___ Amnt: _____

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:

```
PF5=TOP, PF6=BOTTOM, PF7=BACKWARD, PF8=FORWARD, PF 12=PROCESS
06/13/97          GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES          GRAD
10:34:45.1              New Pay Information                      DAM3

                          Chng Eff Dte: 05/01/1996

      SSN: 914-01-0081          Name: TYSON, INGRID S          Class: ACAD
Home Budget: 04-004-13 UP Job Desc Ttl: GRAD ASST 1/2          Grade: 10
      HR Rep #: 020              Job Desc #: AM20-0010          Step: NA
H Admin Area: 004          Pos #/Pos Type: 29949-000    S          Rank: M20
-----
Pay Period #: 12    Appt Type/Pr/Se: GRD  P          Sal Plan: 35W
                   Old Appt Sal: 4590.00          New Appt Sal: 4800.00

                   Pay Budget: 04 - 004 - 13 UP          Pay Fund: 10010
Pay Freq: GRAD      Check Sort: 099          PrePaid PPd #s: _ _ _

----- Remaining Complete PPds ----- | ----- Partial PPds -----
# PPds: _5          Amnt/PPd: 960.00_ | First PPd #: 1          Amnt: 2
                   | Last PPd #: 3          Amnt: 4
```

- 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.

Notepad Area Screen

06/13/97 10:36:22.2	GRAD ASSISTANT/FELLOW/SCHOLAR CHANGES Notepad -- Last Page	GRAD DAM3	
Form Action: ADD	Document #:	Unit: ENT	Confidential(Y/N): Y Document Status:
SSN: 914-01-0081 H Admin Area: 004	Name: TYSON, INGRID S Pos #/Pos Type: 29949-000 S	Chng Eff Dte: 05/01/1996	
Note Pad Area: Grade change from 09 to 10. _____ _____ _____ _____			
Last Action: Last Action Name:		Next Approver: _____	
Next Function: _____			(menu,keys,end)

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 **SUB**mitted :

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 Awaiting ForMs (BAFM)** or **Process Awaiting ForMs (PAFM)**. At that time, you can **APPr**ove the form and it will continue routing through the department's approval path.

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.