

New Appointment Objectives (NAPP)

> Note:

Effective 11/5/97, I-9/Foreign National data will no longer be entered and/or updated in this form. The I-9/Foreign National data can be viewed in this form but the information must be entered and/or updated using the new I-9/Foreign National functions AI9F, UI9F, AI9C or UI9C.

See the I-9/Foreign National Functions documentation for information about these new functions.

The New Appointment Objectives [NAPP] is divided into the following actions and upon completion of the New Appointment module, you will be able to do the following tasks:

- Navigate through a New Appointment form.
- Appoint an employee to an unfilled position.

The following screen samples are available as part of the NAPP documentation:

- [New Appointment Screen](#)
- [Appointment Data Screen](#)
- [Salary Budget Distribution Screen](#)
- [Source/Destination of Funds Screen](#)
- [Personal Data Screen](#)
- [Address Data Screen](#)
- [W-4 Form Screen](#)
- [Tenure Data Screen](#)
- [New Appointment Summary Screen](#)
- [New Appointment Contents Screen](#)
- [Note Pad Area Screen](#)

The contents screen is always displayed when a form is added and prompts the user to enter appointment type, position number, employee class (if position number not entered), home budget (if position number not entered), and employee social security number. Subsequent form

actions (e.g., SUB, APP, CHG) display the contents screen which lists each page within the form and allows the user to access all or selected page(s).

The first five pages of the form (Appointment, Permanent Budget, Personal, Address, W-4) are required for all employees. The W-4 form was included as a page in the IBIS New Appointment form to ensure that all information related to an appointment travelled together through EASY and was approved/rejected/added to the database as the same time.

The last two pages of the form (tenure and notepad) are optional. Again, these are included in the New Appointment form to ensure that all information related to hiring an employee is routed through EASY together.

The basic New Appointment form (without the W-4, and the optional pages) consists of three screens. There is a large amount of data being collected on this form that, if not entered at the time of the appointment, will most likely never be entered for the employee. For this reason, it was placed on the New Appointment form.

New Appointment Screen

```
PF5=TOP, PF6=BOTTON, PF7=BACKWARD, PF8=FORWARD, PF 12=PROCESS
05/18/98                                NEW APPOINTMENT                                NAPP
14:51:53.7                                JWD1

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

Enter Appointment Type: FT2
      Home Budget: 02 - 021 - 24 UP
      Position Number: _____ - _____      Overlap?: N      System?: Y
      Employee Class: ACAD                                Temp Fill?: N      PNA?: N
Appointment Begin Date: 06 / 01 / 1998      OR Semester Begin: _____ thru: _____
      Employee SSN: 914 - 01 - 0033

NEXT FUNCTION: _____                                (MENU, KEYS, END)
```

See the Human Resources procedures section [HR-14](#) of the Policy Manual "Appointing Employees" before starting this form.

Complete the required fields and press **PF8**.

> Note:

Position Number will not be required for Non-Academic FT2, RES, WAG; and Academic ADJ, FEL, FT1, FT2, GRD and SCH appointments.

If a position number is not entered, place a 'Y' (Yes) in 'System?' in order for a system-generated position to be created.

"Save" Record Function: This subprogram reads a "save" record for a STN or FT1 appointment with a class of either Tech or STFF. This record is needed for salary information and must exist before the F.O. can approve the form. This record type replaces the old SPSF and STEP forms.

Fields Overlap? and System? will automatically default to "N" (No).

Overlap Position Number should have a "1" as the last digit.

Example:

00222-001

> Use **PF1** to select items from specific code sets.

Appointment Data Screen

```

PF5=TOP, PF6=BOTTON, PF7=BACKWARD, PF8=FORWARD, PF 12=PROCESS
05/18/98 NEW APPOINTMENT NAPP
14:57:44.1 APPOINTMENT DATA JWD1

Pos Type: HAdmn: 021 H Bud: 02 - 021 - 24 UP
Class: ACAD
SSN: 914-01-0033 Name: HERMAN N FRIDAY
HRep#: 240
Pos #: _____ - ____ Overlap?: N System?: Y Camp Loc: UP
Appt Type: FT2 Primary/Secnd: S Wk Unit: NA_
Appt Begin: 05 / 01 / 1998 Appt End: 10 / 31 / 1998
Grade: _____
Rank: A40 Acam/Exec T1: NA_ Acam/Exec T2: NA_
Rank Title: INSTR Dspln: INSTRUCTOR_____ Tenr Elig: N
Job Desc Ttl: View 1-9(Y/N): N
Scnd Title: INSTR INSTRUCTOR_____
Equiv Wrk %: 20.0_ # Credits: 3.0_ Non-Teach %: _____ Non-Credit %: _____
HR85 Appt: N Special Appt: N Sal Plan: 20W
Pay Freq: MNTH Check Sort: 099 Annlz Sal: 10980.00_
Position Sal: Appt Sal: 1000.00_
Pay Budget: 02 - 021 - 24 UP Pay Fund: 10010 MLD: N
PAY INFORMATION
First PPd#: 4_ Last PPd#: 8_ # Cmpl PPds: 2_
1st PPd Amt: 330.00_ Last PPd Amt: 335.00_ Amnt/PPd: 335.00_

```

The screen sample above illustrates the Appointment Data Screen for a FT1 appointment. This screen will vary depending on appointment type (e.g., STN, FT1, FT2, FTM, GRD, FEL, SCH, RES, ADJ).

Complete the required fields and enter (or change) any other desired information; then press **PF8** to continue.

> Use **PF1** to select items from specific code sets.

Salary Budget Distribution Screen

```

05/21/98                                NEW APPOINTMENT                                Screen 2.0
09:09:49.1                             SALARY BUDGET DISTRIBUTION                       NAPP
                                                                                               JWD1
H Admin Area: 015                        Pos #: 00118-000                               Pos Type: P
Home Budget: 02-015-14 UP                New Pos Salary: 87900.00                       Pos Status: UN

Temp Pos BA: N                            Old Pos Salary: 86436.00                       Obj Code: 104

   Budget   Fund   AA#   Trn Cd   Sal %   Sal Amt   |   Net Change
1.   0201514 UP   10010   015     --     -----
2.   0401550 UP   39990   015     --     100.0    86436
3.   -----
4.   -----
5.   -----
6.   -----
7.   -----
8.   -----
9.   -----
10.  -----

NEXT KEY:
NEXT FUNCTION:                                <HELP, MENU, END>

```

The Salary Budget Distribution and Source/Destination of Funds screens can be completed anywhere in the approval cycle; however, they must be completed before Financial Officer approval.

If you want to complete this screen now, fill in the Trn Cd field and press **PF8** to continue.

-- or --

You can bypass this screen by pressing **PF8** and the Financial Officer will complete this screen.

> Use **PF1** to select items from specific code sets.

Source/Destination of Funds Screen

```

05/21/98                                NEW APPOINTMENT                                Screen 3.0
09:37:53.5                              SOURCE/DESTINATION OF FUNDS                          NAPP
                                                                                               JWD1
H Admin Area: 015                        Pos #: 00118-000                                Pos Type: P
Home Budget: 02-015-14 UP                New Pos Salary: 87900.00                       Pos Status: UN

GENERAL FUNDS: 87900                      BA#:
AG FED. FUNDS:                            Fndg Eff Dte: 05 / 21 / 1998                   BA#:
AUXILIARY ENT:                            BA#:
  UNIV SERV:                               Auto/Bat BA(A/B): A                             BA#:
  P.L. 94-482:                             BA#:

SOURCE/DESTINATION                        Obj Trn   Incr /   Position   Pos   BA
      Budget  Fund  Cd   Cd   (-)Decr  AA#   #   Suf  Amount  Typ
1.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P
2.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P
3.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P
4.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P
5.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P
6.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P
7.      _____  _____  _____  _____  _____  _____  _____  _____  _____  P

MORE BUDGETS : N
NEXT KEY:
NEXT FUNCTION:                               <MENU, KEYS, END>

```

If the Salary Budget Distribution screen has been completed, the Source/Destination of Funds screen will appear.

The required fields must be completed at this time. Press **PF8** to continue.

> Use **PF1** to select items from specific code sets.

Personal Data Screen

05/18/98 15:00:20.6	NEW APPOINTMENT PERSONAL DATA	NAPP JWD1
Pos #: -000	Pos Type:	HAdmn: 021
Class: ACAD	Appt: FT2	H Bud: 02-021-24 UP
LEGAL NAME		SSN: 914-01-0033
First	Mid	Last
HERMAN	N	FRIDAY
SIGNATURE NAME		
First	Mid	Last
HERMAN	N	FRIDAY
Sex: M	Birth Date: 08 / 30 / 1963	Marital Stat: M
Student: N	Ctry Czshp: US	Security Cl: NA
Race/Ethnic: WHT	Handicapped: N	Viet/Dis Vet: N
Prev Yrs Svc: _____	Prev Svc Pds: _____	Seniority #: _____
HIGH DEGREE INFORMATION		Yrs Exp: _____
High Degree: MSTR	Date: 08 / 1997	Inst: PSU
Dspln: EDUCATION		Cmnts: _____
MILITARY SERVICE		
Status: _	Dschg Date: _ / _ / _	Dschg Rsn: NA
SIGNATURE DATA		Branch: _
	MPS Signed: _ / _ / _	
FT Confirm: _ / _ / _	Patent Agree: 08 / 07 / 1997	Fluent: FL

Complete the required fields and enter (or change) any other desired data, then press **PF8**.

Additional signature data information:

- FT1 Confirm: is only required for FT1 appointments.
- MPS Signed: (Memorandum of Personal Service) is only required for Academic FT1, FT2 and STN appointments.
- Patent Agree: (Patent Agreement) is only required for Academic FEL, FT1, FT2, FTM, GRD, SCH and STN appointments.

> Use **PF1** to select items from specific code sets.

Address Data Screen

```

05/18/98                                NEW APPOINTMENT                                NAPP
15:02:35.2                               ADDRESS DATA                                JWD1

Pos #:      -000      Pos Type:           HAdmn: 021      H Bud: 02-021-24 UP
Class: ACAD      Appt: FT2      Pr/Se: S
SSN: 914-01-0033      Name: HERMAN N FRIDAY

HOME ADDRESS/PHONE
  Street: 525 SOUTH GILL ST____
  City: STATE COLLEGE____      State: PA      Zip: 16801 ____
  County: 14      Country: US
  Phone: 814 235 - 1981

OFFICE MAILING ADDRESS/PHONE
  Room: 0103_      Bldg Code: BURROWES      Location: UP
  Phone: 814 865 - 6381

PHYSICAL OFFICE ADDRESS
  Room: 0103_      Bldg Code: BURROWES      Location: UP
  Room: _____      Bldg Code: _____      Location: ____

Publish Dir: B

```

Complete the required fields and any other desired information, then press **PF8** to continue.

The Room: under Physical Office Address and Office Mailing Address must be at least four digits.

Example:

2 should be entered as 0002

> Use **PF1** to select items from specific code sets.

W-4 Form Screen


```

PF5=TOP, PF6=BOTTON, PF7=BACKWARD, PF8=FORWARD, PF 12=PROCESS
- 05/18/98 NEW APPOINTMENT NAPP
15:09:47.3 W-4 JWD1

Pos #: 000 Pos Type: HAdmn: 021 H Bud: 02-021-24 UP
Class: ACAD Appt: FT2 Pr/Se: S
SSN: 914-01-0033 Name: HERMAN M FRIDAY
HAddr: 525 SOUTH GILL ST STATE COLLEGE PA 16801

Taxing Authority: _____
W-4 Marital: S
Exemptions: 1
Fed Add On $: _____
W-4 Date: 08 / 07 / 1997

If employee is requesting exemption from Federal and/or State withholding,
please indicate by entering an 'X' next to the appropriate form(s) being filed:
W-4E: _ (Federal) RIT-214: _ (State)

----- FOR PAYROLL OFFICE USE ONLY -----
Tax Exempt: 0 Occup. Tax: N UP Tax Dist: Y FICA Status: F
Boro: 14001 W4 Verified: Y

```

Complete the required fields and enter or change any other information, then press PF8 to continue.

- Previous W-4 information may appear. This can be changed.
- A paper W-4 must be sent to Payroll Office. Please write the **NAPP** document number on the paper W-4 form.

> Use **PF1** to select items from specific code sets.

Tenure Data Screen

05/21/98	NEW APPOINTMENT		NAPP
09:11:24.6	TENURE		JWD1
Pos #: 00118000	Pos Type: P	HAdmn: 015	H Bud: 02-015-14 UP
Class: ACAD	Appt: STN	Pr/Se: P	
SSN: 914-01-5007	Name: SUSAN DELION		
Tenr Elig: P			
Tenr Unit: <u>SC</u>			
Prev Cr Tenr: 0			
Tenr Years: _			
Tenr Begin: 05 / 18 / 1998			
Tenr Anniv: 07 / 01 / 1998			
Tenr Granted: _ / _ / _			

This screen will **ONLY** appear for academic appointments.

> Use **PF1** to select items from specific code sets.

Summary Screen

```

PLEASE ENTER FORM ACTION
05/21/98                                NEW APPOINTMENT                                NAPP
09:12:32.7                                JWD1
Form Action:  Document#: 87499    Unit: AERSP    Confidential(Y/N): Y
                                                Document Status: NEW

Ssn: 914-01-5007    Name: DELION, SUSAN

FROM                                     TO/NEW

Admin Area:
Dept Name:                                AEROSPACE ENGR
Home Budget:  -  -    02-015-14 UP    Obj Code: 104
Title:                                PROFESSOR AERO ENGR
Class:    Appt Type:    ACAD    STN    P
Grade:    Step:    NA    NA
Salary Plan:    Pay Freq:    36W    MNTH
Pay Budget:  -  -    Fund:    02-015-14 UP    10010
Appt Salary:    Hrly Rate:    87900.00
Position #:    -    Admn Area:    00118-000 P    015

Appt Begin: 05 / 18 / 1998
Appt End: 00 / 00 / 0000
Emp Status: ACT    Pos FTE: 1.000
High Degree: PH D    Tenure: 0
Position Formerly Held By:

**PF 10=BUDGET AMEND**

NEXT FUNCTION: _____ (MENU,KEYS,END)

```

This Summary screen will replace the cover screen, after the form has been added.

This provides approvers the convenience of viewing important information about the employee without paging through the NAPP form.

If you want to page through the form, **PF8** will allow you to page through all the screens, one screen at a time.

> Use **PF1** to select items from specific code sets.

Contents Screen

```

PF5=TOP, PF6=BOTTON, PF7=BACKWARD, PF8=FORWARD, PF12=PROCESS
05/18/98                                NEW APPOINTMENT                                NAPP
15:29:16.9                                JWD1

Form Action: CHG   Document #: 87443   Unit: ENGL   Confidential (Y/N): Y
                                                Document Status: NEW

SSN: 914 - 01 - 0033   Name: FRIDAY, HERMAN M
Class: ACAD   Appt Type: FT2                                Object Code: 124
Page 1 - Appointment Data
Pages 2 & 3 - Budget Distributions
Page 4 - Personal Data
Page 5 - Address Data
Page 6 - W-4
Page 7 - Meal/Lodging Deduction
Page 8 - Tenure
Page 9 - Note Pad

Enter Page #:
Last Action: CHG                                Other Forms Awaiting Action (Y/N)? N
Last Action Name: JOHN DIXON
NEXT FUNCTION: _____ <MENU,KEYS,END>

```

This Contents screen will appear after the Summary screen, after the form has been added.

This allows you to select a particular page to view.

PF8 will allow you to page through all the screens, one screen at a time.

> Use **PF1** to select items from specific code sets.

Note Pad Area Screen

```

PF5=TOP, PF6=BOTTON, PF7=BACKWARD, PF8=FORWARD, PF 12=PROCESS
05/18/98                                NEW APPOINTMENT                                NAPP
15:10:36.1                                JWD1

Pos #:      -000      Pos Type:      HAdmn: 021      H Bud: 02-021-24 UP
Class: ACAD      Appt: FT2      Pr/Se: S
SSN: 914-01-0033      Name: HERMAN N FRIDAY

Note Pad Area: _____
                    _____
                    _____
                    _____
                    _____

LAST ACTION:
LAST ACTION NAME:
NEXT APPROVER: _____

NEXT FUNCTION: _____      (MENU,END)

```

The **Note Pad Area** is where you can put any important information that other approvers will need to know in order to expedite processing of 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 Note Pad screen if the first approver is not a default approver.