

NEW APPOINTMENT – GRADUATES, FELLOWS, & SCHOLARS

How to access:

1. From the Main IBIS menu, type **M2AS** (Easy Elec. Appr System) in the next function area and press **[ENTER]** to move to the EASY screen.
2. Type **NAPP** (New Appointment (Rel2)) and press **[ENTER]**.

Helpful Hints:

- This form is not to be used for making a change to a current appointment or for re-appointments. The GRAD form should be used for changes or re-appointments. Refer to the instructions for completing the GRAD form in this manual.
- When you begin the New Appointment form, the first screen you see will be the cover screen. Once the form has a number, the cover screen becomes a contents page and cannot be changed.
- If at any screen you do not have the necessary information to complete. Press **[PF5]** to return to the top of the form and press **[PF12]** to add the information that has been filled in so far. The form will be created. Please make note of the form number for further data entry. To continue adding information, type **CHG** in the form action and press **[PF8]** to select the desired page.
- The New Appointment (Grad) form will begin as an NAPP form but will become a GFSA form. When using the browse functions (BFMB or BFSN) look for GFSA as the form type.

Accessing the Help Screens:

1. If you are unsure of a code that should be used in a particular field. With your cursor positioned in the field, press the **[PF1]** key. If help information is available it will be displayed.
2. If the help list is extensive, you should:
 - Press **T** and then **[Enter]** to move to the Top of the list.
 - Press **N** and then **[Enter]** to move to the Next page of the list.
 - Press **P** and then **[Enter]** to move to the Previous page of the list.
3. After finding the correct code, to return to the entry screen press **[PF12]**.

Cover Screen:

1. In the Appointment type field, type one of the following codes:
 - GRD** (Graduate Assistant)
 - FEL** (Fellow – Post Doc, Pre Doc, Trainee)
 - SCH** (Scholar – Post Doc)

Note: Once the form has been created (a document # has been assigned), the Appointment Type cannot be changed on the form. A new form will need to be created.

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2. The home budget will be in the NN-NNN-NN UP format.
3. Position number should be blank. Type **Y** in the System? Field.
4. Employee Class will be **ACAD**.
5. Type Semester begin and ending. Example: SP95, SU95, FA95, etc.
6. Type the individual's Employee ID Number. Please review all occurrences on your paper work for accuracy.

After the information is entered, Press **[PF8]** to have the information edited and move onto the Appointment Screen. If the Appointment screen does not appear, refer to the upper left corner of the screen for an error message. If an error has occurred, please correct it and press **[PF8]** to move on.

Appointment Data Screen (GRD):

The Appointment Data Screen will vary depending on the Appointment Type code on the Cover Screen. The following are the instructions for **GRD (Graduate Assistant)**.

1. Information will fill in automatically from the cover screen. The HRep# is on the line above when the cursor is positioned. It is a required field, to move to this field, pres the **[SHIFT] & [TAB]** at the same time. Type **020** in the HRep# field.
2. Pos # will be blank.
3. Primry/Secnd field will default to P or S. This will indicate whether this appointment is primary or secondary; i.e. is the individual working in another budget area. The system will automatically correct, therefore do not alter it.
4. Actual semester beginning and ending dates will fill in automatically. Please verify for accuracy.
5. Type in appropriate Grade level in Grade field.
6. Type in appropriate Rank.
M10 GRAD ASST ¼ **M20** GRAD ASST ½ **M30** GRAD ASST ¾
7. The Check Sort will default to 099 and should not be changed. (099 is for direct deposit)
8. The Appt Salary field will fill in automatically when the screen is edited. If this does not occur you may receive an error message indicating 'Grad Salary Table' cannot be found. To "get around" this problem, you will need to enter the appropriate salary.
9. The Pay budget should be the clearing account (04-004-98 UP) unless otherwise directed.
10. The Pay Fund should be 10020 (to correspond with the clearing account).
11. At the bottom of the screen, the First PPD# must be filled in. Type the number from the following chart that corresponds to the appropriate month the first paycheck is to be received. This number is based on the fiscal year, not the calendar year.

July – 1	August – 2	September – 3	October – 4
November – 5	December – 6	January – 7	February – 8
March – 9	April – 10	May – 11	June – 12

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12. Type in number of complete pay periods. In most cases it will be **5** for one semester or **10** for two semesters.
13. Pay period amounts will be equal. Please fill in the 1st pay amount and amount paid field.
14. If Graduate student has a different source of tuition funding other than pay budget shown, please make note of this in the Notepad area of form.

After the information is entered on this screen, press **[PF8]** to have the information edited and move onto the Personal Data Screen. All other information on this screen will fill in automatically. If the Personal Data Screen does not appear, refer to the upper left corner of the screen for an error message. If an error has occurred, please correct and press **[PF8]** to move on to the Personal Data Screen. Instructions for this screen begin on page **GRAD-5**.

Pop-Up window

When processing a graduate assistantship appointment, the following pop-up window appears:

All of the duties assigned to this student are required of every degree candidate in the applicable program as a condition of receiving a degree.

- YES
- NO
- NOT KNOW

Note: If all graduate assistants in a degree program area are required to do the same duties, then this box should be answered YES. When answering YES, means the graduate assistant will not have any state, local or FICA taxes withheld from their monthly pay. If they do perform different duties, then this box should be answered NO. When answering NO, means the graduate assistant will have state, local and FICA withheld from the monthly pay.

Appointment Data Screen (FEL):

The Appointment Data Screen will vary depending on the Appointment Type code on the Cover Screen. The following are the instructions for **FEL** (Fellow – Post Doc, Fellow – Pre Doc, Fellow – Trainee).

1. Information will fill in automatically from the cover screen. The HRep# is on the line above when the cursor is positioned. It is a required field, to move to this field, press the **[SHIFT] & [TAB]** at the same time. Type **020** in the HRep# field.
2. Pos # will be blank.
3. Primry/Secnd field will default to **P** or **S**. This will indicate whether this appointment is primary or secondary; i.e. is the individual working in another budget area. The system will automatically correct, therefore do not alter it.
4. Actual semester beginning and ending dates will fill in automatically. Please verify for accuracy.
5. Type in appropriate Rank.
P10 FELLOW-POSTDOC **P20** FELLOW-PREDOC **P30** FELLOW-TRAINEE
6. Type **TAXM** in the Pay Freq field.
7. The Check Sort will default to 099 and should not be changed.
8. Type appropriate amount in Appt Salary field. Do not use \$ (dollar sign) or , (commas).

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9. If Pay budget is different from the Home Budget, it can be typed on this screen. Do NOT use the clearing account (404-98, 1002) for FELs.
10. Pay Fund is a required field and a zero (0) must be added at the end. For example; fund number 1001 will become 10010.
11. At the bottom of the screen, the First Ppd# must be filled in. Type the number from the following chart that corresponds to the appropriate month the first paycheck is to be received. This number is based on the fiscal year, not the calendar year.

July – 1	August – 2	September – 3	October – 4
November – 5	December – 6	January – 7	February – 8
March – 9	April – 10	May – 11	June – 12
12. Type in number of complete pay periods. In most cases it will be **5** for one semester or **10** for two semesters.
13. Pay period amounts will be equal. Please fill in the 1st pay amount and amount paid field.
14. Fill in appropriate source of tuition information.

After the information is entered on this screen, press **[PF8]** to have the information edited and move onto the Personal Data Screen. All other information on this screen will fill in automatically. If the Personal Data Screen does not appear, refer to the upper left corner of the screen for an error message. If an error has occurred, please correct and press **[PF8]** to move on to the Personal Data Screen. Instructions for this screen begin on page **GRAD-5**.

Appointment Data Screen (SCH):

PLEASE NOTE: Post-doc scholar appointments are entered by the College's HR Office.

The Appointment Data Screen will vary depending on the Appointment Type code on the Cover Screen. The following are the instructions for **SCH** (Scholar – Post Doc).

1. Information will fill in automatically from the cover screen. The HRep# is on the line above when the cursor is positioned. It is a required field, to move to this field, press the **[SHIFT] & [TAB]** at the same time. Type **020** in the HRep# field.
2. Pos # will be blank.
3. Primry/Secnd field will default to **P** or **S**. This will indicate whether this appointment is primary or secondary; i.e. is the individual working in another budget area. The system will automatically correct, therefore do not alter it.
4. Actual semester beginning and ending dates will fill in automatically. Please verify for accuracy.
5. Type in **Q10** (Scholar – PostDoc) in Rank field.
6. Type Equiv Work %.
7. The Check Sort will default to 099 and should not be changed.

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8. Type appropriate amount in Appt Salary field. Do not use \$ (dollar sign) or , (commas).

9. The Pay budget should be the clearing account (04-004-98 UP) unless otherwise directed.

10. The Pay Fund should be 10020 (to correspond with the clearing account). If the clearing account is not used as the Pay Budget, use the appropriate fund.

11. At the bottom of the screen, the First PPd# must be filled in. Type the number from the following chart that corresponds to the appropriate month the first paycheck is to be received. This number is based on the fiscal year, not the calendar year.

July – 1	August – 2	September – 3	October – 4
November – 5	December – 6	January – 7	February – 8
March – 9	April – 10	May – 11	June – 12

12. Type in number of complete pay periods. In most cases it will be **5** for one semester or **10** for two semesters.

13. Pay period amounts will be equal. Please fill in the 1st pay amount and amount paid field.

14. Fill in appropriate source of tuition information.

After the information is entered on this screen, press **[PF8]** to have the information edited and move onto the Personal Data Screen. All other information on this screen will fill in automatically. If the Personal Data Screen does not appear, refer to the upper left corner of the screen for an error message. If an error has occurred, please correct and press **[PF8]** to move on to the Personal Data Screen. Instructions for this screen begin below.

Personal Data Screen:

1. The First Name and Last Name are required fields. If Preferred name is different from First Name, please type it in the appropriate field.
2. Type **F** (Female) or **M** (Male) in Sex field. (Required)
3. Type Birthdate using four digits for the year. (Required)
4. Marital Status will default to **U** (Unknown). This field is not required, but could be corrected to **S** (Single) or **M** (Married), etc.
5. Please type **F** to indicate Full-Time in the Student field.
6. Ctry Czn (Country Citizenship) is a required field. Valid codes can be found by pressing **[PF1]** when the cursor is in the field. The Valid code list is extensive. **US** is the code for United States. Note that if this individual is other than US additional information will be required on a later screen.

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7. Race/Ethnic is a required field. The following are the codes used for this field. **ASN** (Asian), **BLK** (Black), **HSP** (Hispanic), **IND** (American Indian), **WHT** (White). Valid codes can also be found by pressing [PF1] when the cursor is in the field.
8. High Degree is required. Some valid codes are listed. Use [PF1] to find others.

BACC	BACCALAUREATE DEGREE		
MSTR	MASTERS DEGREE	UNK	UNKNOWN
B LLB	BACHELOR OF LAW	D OTH	DOCTOR, OTHER EARNED
D ED	DOCTOR OF EDUCATION	D SCI	DOCTOR OF SCIENCE
D LLD	DOCTOR OF LAWS, LL.D	PH D	DOCTOR OF PHILOSOPHY
9. The date the high degree was earned is also required. (Month is 2 digits, year is 4 digits)
10. The Institution where the degree was earned and the discipline area are not required fields, but should be filled in if known.
11. A Loyalty Oath must be signed by the Graduate student. The appropriate field should have a **Y** to reflect that it has been signed.
12. Enter the date the Patent Agreement was signed by the student.

After the information is entered on this screen, press **[PF8]** to have the information edited and move onto the Address Data Screen. If the Address Data screen does not appear, refer to the upper left corner of the screen for an error message. If an error has occurred, please correct and press **[PF8]** to move one.

Address Data Screen:

1. Enter the Street address, City, Zip Code, County and Phone Number. The State will default to PA and can be changed. The Country will default to whatever was entered on the previous screen. All this information is required and you should not use special characters such as * or # when entering.
2. The Office mailing address information is required. The Room field must be 4 (four) digits long – please enter leading 0 (zero); for example room 201 will be 0201.

For the Bldg Code field, refer to the help screen [PF1] for valid code. This list is long, so make note of buildings commonly used by your unit for future reference.

The Location in most cases will be UP (University Park). Other commonly used location codes could be RS (Rock Springs) and ST (Stone Valley).
3. The Physical office address is required. The Room field must be 4 (four) digits long. The Bldg Code must be valid, and could be the same as the office mailing address information.
4. Publish Dir field should be **N**.

After the information is entered on this screen, press **[PF8]** to have the information edited and move onto the W-4 Screen. IF the W-4 screen does not appear, refer to the upper left corner of the screen for an error message. If an error has occurred, please correct and press **[PF8]** to move on.

W-4 Screen:

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Information is to be copied from the W-4 card. If the W-4 is already on file, this information should automatically appear on the screen and you are not able to change it. Submitting a new W-4 will cause the appropriate changes to take place in the database.

If the W-4 is not already on file, you will need to:

1. Type taxing authority from the W-4 card.
2. W-4 Marital status will default to **S** (Single), but can be changed to **M** (Married).
3. W-4 date must be the date that the W-4 was signed and dated by the individual.

After the information is entered on this screen, press **[PF8]** to have the information edited and move onto the Notepad Screen.

Notepad Screen:

1. Use the Notepad area for special instructions including the following message:

Stipend: budget number, fund number, obj. class, and cost center.

Tuition/GIA: budget number, fund number, obj. class, and cost center.

I-9 Status

After the information is entered on this screen, press **[PF5]** to have the information edited and return to the top of the form. To process the form, press **[PF12]**.

Once the form is created you will have a document number assigned. If no document is displayed, please review the form for entry errors, correct them and process the form again.

Summary Screen:

1. The summary screen replaces the cover screen after the form has been added. Information cannot be changed directly on the summary screen. To review any of the screens, press **[PF8]** to move to contents screen.

Contents Screen:

1. Type **CHG** in the form action, then type the page number you wish to view and press the **[ENTER]** key.
2. If the page number does not apply to this type of form, you will be warned that the page does not exist.
3. To Submit the form for approval, type **SUB** in the form action and press **[PF12]**. If required pages are not complete you will see an error message in the upper left corner indicating which pages are incomplete. Once the form has been submitted, the Status of form will be SUB.

To Print the Form:

1. Type **PRT** in the form action field.
2. Press **[PF12]** to process PRT action.
3. **VVVV** will appear in the upper left corner of screen. Type **%H** and press **[ENTER]**.

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4. On the screen, the Printer Destination should be appropriate for your office and press **[ENTER]**. The Form will return to the screen.