# Online Graduate Payroll System User Manual

Grad PA Manual

This Manual provides step-by-step instructions for connecting to the graduate payroll system, entering and revising stipends information and adding or modifying tuition awards.

Cindy Wilkes 1/31/2012

# **Online Graduate Payroll System Log In:**

- Log into WebApps
- Select the HR/Payroll tab
- Under Web Entry click on Graduate Payroll Authorization Form
- The main menu will appear with two sections
  - Graduate Payroll Authorization Form section for Initiators.
  - Graduate PAs Awaiting Your Approval section for Approvers.

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				Gradu	ate PA *TEST PH	ASE 3 PILOT*				
Banner Docume		Start Date	Description (up t	o 35 chars)	Dept Ref (up to 8 chars)	Student	Status		Action	
		06/28/2010							Clear	New DOC
201005181:	14241	05/18/2010	test				IN PROGRESS	Modify	Delete	
2010051910		05/19/2010	test			Lin, Adam Y	IN PROGRESS	Modify	Delete	Print PA
GR00023		05/12/2010	test			Terentyev, Igor Sergey		Modify	Delete	Print PA
GR00024		05/19/2010	test			Sayyad, Arshad Shahid		Modify	Delete	Print PA
GR0002	85	05/25/2010	test			Wan, Yifei	IN PROGRESS	Modify	Delete	Print PA
				Gradu	uate PAs Awaiting	Your Approval				
Banner ocument	Start Da	ate Descri	ption (up to 35 chars)	Dept Ref (up to 8 chars)	Student		Status		Act	ion
R000314	06/01/20	010 AD	MINSYSTEMS TEST	ASYSTEST	Cuchiara, Michael	Paul approval reque	sted by MAJ1 on 17-JUN	-2010	Display PA	Print PA
R000322	06/17/20	010 AD	MINSYSTEMS TEST		Gao, Liang	approval reque	sted by MAJ1 on 17-JUN	-2010	Display PA	Print PA
R000324	06/18/20	010 AD	MINSYSTEMS TEST		Gao, Liang	approval reque	sted by MAJ1 on 18-JUN	-2010	Display PA	Print PA
R000325	06/18/20	010 AD	MINSYSTEMS TEST		Gao, Liang	approval reque	sted by MAJ1 on 18-JUN	-2010 [	Display PA	Print PA
R000326	06/18/20	010 AD	MINSYSTEMS TEST		Gao, Liang	approval reque	sted by MAJ1 on 18-JUN	-2010	Display PA	Print PA
R000327	06/18/20	010 AD	MINSYSTEMS TEST		Gao, Liang	approval reque	sted by MAJ1 on 18-JUN	-2010	Display PA	Print PA
R000328	06/18/20	010 AD	MINSYSTEMS TEST		Gao, Liang		sted by MAJ1 on 18-JUN		Display PA	Print PA
R000334	06/25/20	010 AD	MINSYSTEMS TEST		Gao, Liang	approval reque	sted by MAJ1 on 25-JUN	-2010	Display PA	Print PA
	allod 06/21	/2010 15:05:24 d	evl - Created 05/29/2010							

#### To create a new PA

- Enter a description up to 35 characters
- Enter a department reference (optional)
- click on "New Document"

Student information section:

Enter student ID number and click "Add"

If ID number is unknown enter student's last name and search by clicking on Grad student Search, select student from list and click "Add".

	Graduate Payroll A	Authorization Form	
	Go To: Student Info :: Rem	arks	HELP
Date Prepared	Description	Document #	Status
01/26/2012	test	GR006886	IN PROGRESS
Contact Info: Top			
Student Info: Top			
	Student ID		Action
E	nter ID (or Last Name for Grad Student Search):	Grad Student Search	Add Clear
Type of Action: T	op		

Form automatically populates the student information.

Type of Action Section:

Select the type of action and click "Add". There are five types of actions to choose from.

- 1. First Appointment (will only appear for first appointments)
  - 2. New Action for continuing student
  - 3. Revision of previous submitted stipend appointment
  - 4. One-time payment
  - 5. Termination of Stipend

Type of Action: Top		
● First appt as Rice grad student	O New action, continuing student	
O Revision of prev. submitted stipend appt	O Termination of Stipend	Add
One-Time Pay		

## **First Appointment Process**

- Select First appt as Rice grad student radio box and click "Add"
- Current/Future Stipend Support section will automatically populate
- Click New/Revised Stipend (on the right) to enter new payroll information
- *N* will appear in the action box for new action
- Enter begin date (1<sup>st</sup> or 16th) using MM/DD/YYYY or MM/DD/YY date format
- Enter end date (15th or the last day of the month) using MM/DD/YYYY or MM/DD/YY date format
- Form automatically calculates # of months
- Enter **\$/month** or *Total \$ for period* (system will calculate un-entered amount)
- Enter *fund number*
- Enter *organization code*
- Enter *account code*
- Form automatically pulls in the program code, Activity code, Location code and PI (if available)

- Select title from drop down box: Rice Fellow, Research Asst., Teaching Asst. or Enter Title
- Form automatically enters services rendered Y (yes) or N (no)
- Click Add
- Enter remarks
- Click Add
- In the tuition support section click on "New Support"
- Enter fellow tuition award at appropriate tuition rate
- Click "Add"

## New Action for continuing student

- Select New action, continuing student radio box and click "Add"
- Form populates current stipend distribution designated by a "C" in the action column and shaded in gray
- Click *New/Revised Stipend* to enter new payroll information

Ту	pe of Ac	tion: Top															
New	ew action, continuing student Change													Change			
Cur	Current/Future Stipend Support: Top Student Payroll History Personnel Action Job History																
lf one Begir \$/Ma	e-time p and En nth OR	ayment is m d Dates are i Total \$ for p	s listed with ' ade, put '1X' required field eriod needs t ed in this sec	in Actior Is and MI o be ent	ı. UST be ent ered by us	ered using f	MM/DI	)/YYYY	OR MM	/DD/1			ırrent line	number that is	being	revised (i	e. R1, R2).
Line No.	Action	Begin date	End date	# Months	\$/Month	Total \$ for period	Fund	Orgn	Acct	Prog	Actv	Locn	PI Name	Title	Job#	Services	Action
1	1 C 08/01/2011 06/30/2012 11 1,454.55 16,000.00 A1 246207 60820 AID Provost Fellow 00 New/Revised Stipend																
		Next availa	ble begin dat	e: 01-	FEB-12		Total	Current	Monthly	/ Stipe	end:	\$ 1,4	54.55	Total	New I	Monthly St	ipend: \$ 1,454.55

- *N* in the action box for new action will appear
- Enter begin date (1<sup>st</sup> or 16th) using MM/DD/YYYY or MM/DD/YY date format
- Enter end date (15th or the last day of the month) using MM/DD/YYYY or MM/DD/YYY date format
- Form automatically calculates # of months
- Enter **\$/month** or *Total \$ for period* (system will calculate un-entered amount)
- Enter *fund number*
- Enter *organization code*
- Enter *account code*
- Form automatically pulls in the program code, Location code and PI (if available), you can also enter activity code and location code if applicable
- Select title from drop down box: Rice Fellow, Research Asst., Teaching Asst. or Enter Title
- Form automatically enters services rendered Y (yes) or N (no)
- Click Add

Type of	f Action: Top													
New acti	on, continuing	student												Change
Current	/Future Stipe	nd Support: Top	Student Payrol	l History Pers	sonnel Actio	n Job Hist	ory							
If one-tin Begin and \$/Month	ne payment is I End Dates ar OR Total \$ for	t is listed with '( made, put '1X' i e required field: period needs to layed in this sec	in Action. s and MUST be o be entered by	entered using N user.	IM/DD/YY	YY OR M	IM/DD/Y		rrent line num	ber that is bei	ing revised (	ie. R1, R2).		
Line. No.	Action B	egin date 🛛 En	d date 🛛 # Mon	ths \$/Month	n Total 9	6 for peri	od F	und Orgn	Acct Prog	Actv Locn	PI Name	Title Job# 9	Services Re	ndered?
1 C	08/01/2011	06/30/	2012	11 1,454.5	55	16,000	.00	A1	246207	60820	AID	Provost Fello	w	00
Line. No.	Action	Begin Date	End Date	\$/month	Total \$/fo	or period	Fund	Orgn	Acct	Actv	Locn	Title	Act	ion
	N	02/01/12	06/30/2012	500			A1	246000	60820	GPS	R3C034	Rice Fellow	× A	dd Clear
	Next a	wailable begin d	late: 01-FEB-12		т	otal Curr	ent Month	ly Stipend:	\$ 1,454.55		Total f	New Monthly Sti	pend: \$ 1,4	54.55

- Enter remarks in the Remarks section
- Click Add
- In the tuition support section, verify that the tuition support (Tuition for RA, Tuition for TA or Department Tuition award which is a fellow award) matches the stipend type.
- If stipend type and tuition type are different, adjust the tuition by clicking on "New Support"
- Select the appropriate tuition award and enter the proper rate
- Click "Add"

Academic Year:	2011 - 2012	Award Code: RCMAF1	Award Description: Chemistry Tuition Award		Fall Amount: 0	Spring Amount: 0
Academic Year:	2011 - 2012	Award Code: RGSARA	Award Description: Tuition for RA	Fa	Il Amount: 970	Spring Amount: 0
Academic Year	Award Code			Fall Amount	Spring Amount	
1112	Fellow waiver     TA Waiver (RGSATA)     Direct bill by cashier's     Other (Please explain	ORA Waiver (RGSARA) O Student pays office to outside agency. (Please in Remarks section)	e explain in Remarks section)	970	0	Add Clea

# **Revision of previous submitted stipend appointment**

- Select Revision of prev. submitted stipend appt. radio box and click "Add"
- You will be prompted to answer two questions:
  - 1. Revision of current semester tuition support? (Yes or No)
  - 2. Do you want to change a stipend starting before the next available begin date? (Yes or No)
- Form populates current stipend distribution designated by a "C" in the action column and shaded in gray
- Click *New/Revised Stipend* on the line you wish to revise and enter new payroll information

Тур	e of Ac	tion: Top															
New	action, o	continuing stu	udent														Change
Curr	urrent/Future Stipend Support: Top Student Payroll History Personnel Action Job History																
lf one Begin \$/Mo	-time p and En nth OR	ayment is ma d Dates are r Total \$ for p	; listed with ' ade, put '1X' required field eriod needs t ed in this sec	in Actior Is and Mi to be ent	i. UST be ent ered by us	ered using f	MM/DI	0/1111	OR MM	/DD/			urrent line	number that is	being	revised (i	e. R1, R2).
Line No.	Action	Begin date		# Months	\$/Month	Total \$ for period	Fund	Orgn	Acct	Prog	Actv	Locn	PI Name	Title	Job#	Services	Action
1	С	08/01/2011	06/30/2012	11	1,454.55	16,000.00	A1	246207	60820	AID				Provost Fellow	00		New/Revised Stipend
		Next availa	ble begin dat	e: 01-	FEB-12		Total	Current	Monthly	Stipe	end:	\$ 1,4	54.55	Total	New I	Monthly St	ipend: \$ 1,454.55

- *R* will appear in the action box , enter the line number you are revising after the R (Example: R1 indicates revising line 1)
- Enter begin date (1<sup>st</sup> or 16th) using MM/DD/YYYY or MM/DD/YY date format, Note: the next available begin date is the earliest you can revise stipends in the Current / Future section. For previous stipend revisions, use the Retroactive Payroll History for reallocation or revision section
- Enter end date (15th or the last day of the month) using MM/DD/YYYY or MM/DD/YY date format
- Form automatically calculates # of months
- Enter **\$/month** or *Total \$ for period* (system will calculate un-entered amount)
- Enter *fund number*
- Enter *organization code*
- Enter *account code*
- Form automatically pulls in the program code, Location code and PI (if available), you can also enter activity code and location code if applicable
- Select title from drop down box: Rice Fellow, Research Asst., Teaching Asst. or Enter Title
- Form automatically enters services rendered Y (yes) or N (no)
- Click *Add*

Type of	Action: Top											
Revision (	of prev. subm	itted stipend appl	t		Revision of current s	emester tuiti	ion suppor	t & payroll hist	ory			Change
Current	/Future Stipe	end Support: Top	Student Payrol	I History Pers	sonnel Action Job Hist	ory						
If one-tim Begin and \$/Month (	e payment is End Dates a OR Total \$ fo	s made, put '1X' i re required fields r period needs to	n Action. s and MUST be s be entered by	entered using N user.	'' in Action; if revisi 1M/DD/YYYY OR N he Payroll History s	IM/DD/YY f		rent line numb	er that is bei	ng revised (	ie. R1, R2).	
Line. No.	Action B	Segin date En	d date 🛛 # Mon	ths \$/Month	n Total \$ for peri	od Fun	d Orgn	Acct Prog	Actv Locn	PI Name	Title Job#	Services Rendered?
1 C (	08/01/2011	06/30/3	2012	11 1,454.5	55 16,000	.00	A1 .	246207	60820	AID	Provost Fell	ow 00
Line. No.	Action	Begin Date	End Date	\$/month	Total \$/for period	Fund	Orgn	Acct	Actv	Locn	Title	Action
	R1	02/01/2012	06/30/2012	1600.00		A1	246207	60820			Provost Fellow	Add Clear
	Next 🕨	available begin d	ate: 01-FEB-12	2	Total Curr	ent Monthly	Stipend: \$	1,454.55		Total	New Monthly St	ipend: \$ 1,454.55

If you are revising payroll proir to the next available begin date use the Retroactive Payroll History Section. You can revise payroll line by line in this section or by a block of lines. Indicated a block with a forward slash between the R line numbers (R21/R26) and include the date range (10/16/11 to 1/31/12).

- Enter revisions as indicated above
- Click "Add"

Туре	e of Acti	on: Top																				
Revisi	on of pre	ev. submitt	ed stipe	end appt			Revisio	in of cu	rrent seme	ester ti	uition su	ipport & I	payroll	histo	ory							Change
Curre	ent/Futu	ire Stipen	Suppo	ort: Top 📘	Student F	ayroll History	Personnel /	Action J	ob History	]												
f one- Begin ( B/Mon	time pa and End th OR T	yment is r Dates are otal \$ for	ade, p requir eriod i	ut '1X' in A ed fields ar needs to be	iction. nd MUS <sup>-</sup> e entere	. If new appt T be entered d by user. ange past pay	using MM/DD	·/YYY	Y OR MM/	DD/Y			: line n	umb	er tha	t is bei	ng revis	ed (ie. R	1, R2).			
Line No.	Action	Begin dat	e En	d date	# Months	\$/Month	Total \$ for period	Fund	Orgn	Acct	Prog	Actv	Locn	PIN	ame	Title		Job#	Services	Action		
1	С	08/01/20	.1 06	/30/2012	11	1,454.55	16,000.00	A1	246207	60820	D AID					Provo:	st Fellov	00		New/R	evised St	ipend
2	R1	02/01/20	.2 06	/30/2012	5	1,600.00	8,000.00	A1	246207	60820	D AID					Provo:	st Fellov	00	N		e/Delete evised St	ipend
		Next a	vailabl	e begin da	te: O	1-FEB-12		To	tal Curren	it Mont	hly Stip	end:	\$ 1,45	54.5	5			Total Nev	v Monthly 9	Stipend:	\$ 1,6	00.00
Retro	oactive F	Payroll Hi⊴	tory fo	r reallocat	ion or re	evision : Top																
.ine.N	o. Act	ion Begi	n date	End da	te	# Months	\$/Month	Total §	for Perio	d	Fund	Orgn	Acct		Prog	Actv	Locn	PI Name	Title		Job#	Action
21		H 10	(16/20)	11 10/3	1/2011	.5	1,454.54		727.27		A1	246207	608	320	AID				Provo	st Fellow	00	
22	2	H 11	01/201	11 11/1	5/2011	.5	1,454.54		727.27		A1	246207	608	320	AID				Provo	st Fellow	00	
23	3	H 11	(16/20)	11 11/3	0/2011	.5	1,454.54		727.27		A1	246207	608	320	AID				Provo	st Fellow	00	
24	F	H 12	01/201	11 12/1	5/2011	.5	1,454.54		727.27		A1	246207	608	320	AID				Provo	st Fellow	00	
25		H 12	(16/20)	11 12/3	1/2011	.5	1,454.54		727.27		A1	246207	608	320	AID				Provo	st Fellow	00	
26	j	H 01	01/20:	12 01/1	5/2012	.5	1,454.54		727.27		A1	246207	608	320	AID				Provo	st Fellow	00	
Action		Begin da	te	End date	\$.	/Month	Total \$ for p	eriod	Fund	0	·gn	Acct		Act	tv	La	cn	Title			Action	
R21/R	26	10/16/11		02/01/12	1	600.00			A1	24	6207	6082	0					Provo	st Fellow	×	Add	Clear
		- T	_	P					11			- II-		-				- P				

- Enter remarks in **the Remarks section**
- Click Add
- In the tuition support section, verify that the tuition support (Tuition for RA, Tuition for TA or Department Tuition award which is a fellow award) matches the stipend type.
- If stipend type and tuition type are different adjust the tuition by clicking on "New Support"
- Select the appropriate tuition award and enter the proper rate
- Click "Add"

Academic Year:	2011 - 2012 4	ward Code: RCMAF1	Awa	rd Description: Chemistry Tuition Award		Fall	Amount: 0	Spring	Amount: 0
Academic Year:	2011 - 2012	Award Code: RGSARA		Award Description: Tuition for RA		Fall Amount	: 970	Spring A	mount: 0
Academic Year	Award Code				Fall Amount		Spring Amount		
1112	<ul> <li>Fellow waiver</li> <li>TA Waiver (RGSATA)</li> <li>Direct bill by cashier's of Other (Please explain)</li> </ul>	ORA Waiver (RGSARA) OStudent pays office to outside agency. (Please in Remarks section)	expla	in in Remarks section)	970		0		Add Clear

# **One-time payment**

- Select One-Time Pay radio box and click "Add"
- Choose type of action: One-Time Pay
- Click *Add*
- Form populates current stipend distribution designated by a "C" in the action column and shaded in gray
- Click *New/Revised Stipend* to enter new payroll information
- *1X* in the action box for one time pay will appear
- Enter end date (15th or the last day of the month) using MM/DD/YYYY or MM/DD/YY date format, this will be the one-time payment pay date

- In the Total \$/for period enter *one-time pay amount*
- Enter *fund number*
- Enter *organization code*
- Enter *account code*
- Enter title: Rice Fellow, Research Asst., Teaching Asst. or Enter Title
- Form automatically pulls program code, PI and enters services rendered Y (yes) or N (no)
- Click *Add*
- Enter remarks

# Termination of stipend

- Choose type of action: *Termination of Stipend*
- Click Add
- Form will ask a series of questions:
- Termination Date, enter using *MM/DD/YYYY or (YY) must be on the 15<sup>th</sup> or* the last day of the month
- Is student leaving Rice? Choose Yes or No
- If yes, why? Choose Completed degree, Withdrawn, Leave of Absence, Other Please explain in remarks
- Click Add
- Enter remarks to explain termination, especially if not leaving Rice
- No further action needed, the termination date terminates all future stipend distributions

**Note:** If you need to pay a student for a partial pay period, process a separate PA prior to the termination PA. Do not enter zero dollars (\$00) for a pay period, Banner will not accept zeros.

## **Other Form Features:**

- Initiator information automatically populates
- Student information automatically populates
- Current stipend support is indicated by a "C" in the action column, information is pulled directly from Banner
- Previous stipend support is indicated by a "H" for History in the action column, information is pulled directly from Banner
- Budget status link for funding will take you to the web apps page of the funding budget
- Title drop down box
- Fund activity and location codes
- Lists PI on funding source
- Completed certification are listed in the student section
- Student gender is listed

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() · C	🗙 🏠 🔝 rice.edu	https://webapps2.rice.ed	lu/banweb/pwepagrad.m	ain#pwepagradACCT		☆ - 😽 - Google	
Invitations		Graduate Payroll Aut					
WichApps						Rici	e Univ
		ayroll Student Financial		ocurement   Site Map		Admi	E UNIN
Wilkes, Cynthia (Approv	als) 29-Mar-2012 11:24:36 AM	Explore New WebApps 2.1		Authorization Form			
		Go To: Student	/	Info :: Tuition Info :: Remarks			
Date Prepared		Description		Documer	it #	Status	
03/29/2012		test		GR007247		IN PROGRESS	
Contact Info: To	p						
Department Conta	act Person: Wi	lkes, Cynthia (Approvals)	Phone #:	5812			
Department Initia	<b>iting PA:</b> Gr	aduate & Postdoctoral Studies	Mail Stop:	MS-13			
Graduate Student	: Advisor: Nie	edzielski, Nancy A.	Craduate Student	Iduisor Home dent: Linguistics			
Student Info: To	P						
1		First Manage		Middle Steven	Maria Chudaat	) Condem Const	
Last Name:		First Name:	_	Middle Name:	Marie Student ID#:	Gender: Femal	e Chang
Citizen:	Y	Home department	: Linguistics	Home dept org #:	279000 Degree program:	PHD Start Fall07 Term:	
N	Linguistics	Ins PR Ded:	Y	RCR Certif:	NONE	Term	
Major:	Linguisuus						
Major:	-						
Type of Action:	Тор						
Type of Action:	-				NO		
Revision of prev. su	Тор	Student Payroll History	nnel Action Job History		NO		
Revision of prev. su Current/Future t Current stipend su If one-time payma Begin and End Dat \$/Month OR Total Only future pay is	Top ubmitted stipend appt Stipend Support: Top Stipend Support: Top ent is made, put '1X' in tes are required fields a § for period needs to b displayed in this section	in Action. If new appt, put 'N Action. and MUST be entered using M e entered by user. in. To change past pay, use t	' in Action; if revision, put IM/DD/YYYY OR MM/DD/YY the Payroll History section.	$\wedge$	er that is being revis		
Revision of prev. su Current/Future S Current stipend su If one-time payms Begin and End Dat Sy'Month OR Total Only future pay is Line. No. Action	Top ubmitted stipend appt Stipend Support: Top ent is made, put '1X' in tes are required fields a § for period needs to b displayed in this section n Begin date End	7 Action. If new appt, put 'N Action. and MUST be entered using M e entered by user. In. To change past pay, use t date # Months \$/Mont	' in Action; if revision, put IM/DD/YYYY OR MM/DD/YY the Payroll History section. h Total \$ for period	format. Fund Orgn Acct Prog	er that is being revis	me Title Job# Serv	
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#### **Remarks Section:**

Always enter remarks to help explain the action you are processing. To enter remarks, type in explanation and click add.

Remarks: I	Explain the reason for t	the PA ( <u>always</u> complete this area) Top	
Line. No.	Text		Action
		Revising spring stipend, student received a NIH training grant beginning Jan. 1st.	Add Clear

## **Tuition Support:**

Tuition Suppo	rt: Top						
Academic Year:	2010 - 2011	Award Code: RGSARA	Award Description: Tuition for R	A Fall	Amount: 920	Spring A	mount: 920
Academic Year	Award Code			Fall Amour	nt Spring a	Amount	
1011	⊙ Fellow waiver	○ RA Waiver (RGS	ARA)	00	920		Add Clear
	O TA Waiver (RGSAT	A) OStudent pays					
	O Direct bill by cashie	er's office to outside agency. (I	Please explain in Remarks section)				
	O Other (Please expl	lain in Remarks section)					

- Tuition Support section pulls the current tuition distribution from Banner shaded in gray
- Watch for prompts: "Tuition waiver may need to be adjusted" in red writing
- Change tuition if appropriate by clicking the *New Support* button
- Select new tuition support:
  - Fellow Waiver
  - RA Waiver (RGSARA)
  - TA Waiver (RGSATA)
  - Student pays
  - Direct bill by cashier's office to outside agency (Please explain in Remarks section)
  - *Other (Please explain in Remarks section)* use when grant pays tuition-include fund, org and dollar amount in remarks
  - Enter Fall and/or Spring tuition being adjusted
  - Click Add
  - To add additional support click *New Support, enter tuition distribution, and click Add*

# **Approval Process**

Graduate PA *TEST PHASE	3 PILOT* - Microsoft Internet	Explorer	
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Approver Seq 1	Approver CELESTEB2	Status	Action Delete
NOTE: Federal regulations require that stud conduct of research (RCR). Training should l	ents and postdocs supported by NSF or NIH proje be completed prior to beginning work on an NSF Return After Approval	or NIH award. See HELP for more info	ave completed training in responsible rmation
	Request Appro Choose Approver/Signature Approver		
	Add Approve Back To Grad Student PA		
PWEPAGRAD Installed 06/21/2010 15:05:24 dev1 - Created	Back To Grad Student PA		
PWEPAGRAD Installed 06/21/2010 15:05:24 devl - Created	Back To Grad Student PA		

- **Electronic Approval** Once the PA form is completed, route electronically for approvals.
  - 1. **Choose Approver Button** To select an approver, enter approver's web apps approver name or their last name or a portion of their last name in the approver box and click **Choose Approver**. A list of possible approvers will display, select appropriate approver.
  - 2. Add Approver Button Once an approver is selected, click Add Approver to enter into the approval sequence.
  - 3. **Request Approval Button** Once all approvers have been added to the approver sequence, click **Request Approval** to send PA to the first approver in the sequence.
  - 4. After all approvers have approved the PA it will automatically forward to GPS, then Research Accounting, and then to Payroll.
  - 5. **Return After Approval Radio Button** Select "yes" to have PA electronically returned to you after approval. If you choose this option, you must go back into the system to send PA to the next approver or GPS (we do not recommend this option to avoid forgotten PAs). This button automatically defaults to "No".
  - 6. **PA Reminder Date** Select this option to have a notification sent to you (the initiator) if the PA has not been processed by a particular date.

**\*Signature authority required** – When processing payroll on a fund outside your department Org, an additional approver will be required. This will be indicated by red asterisk on the appropriate line and a note - **\****Signature authority required*.

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### **Electronic Signatures**

Electronic signatures will display on the PA when routed for approvals and on the PA PDF. Approvers will be legible as: Approver ID, full name, status and date approved.

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Attach	Approver Seq	Approver ID	Approver Name	Status	Date	
¥ II ►	1	JMR3	Randall, John M.	APPROVED	06/18/2010	
0						
Comments						

### **Rejected PA**

• If a PA is rejected for any reason, it will return to the initiator's queue with the rejecter's ID and the date rejected. The initiator will also receive an email notification of this action.

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GR000231	05/12/2010	test		Terentyev, Igor Sergeyevich	IN PROGRESS	Modify	Delete	Print PA
GR000249	05/19/2010	test		Sayyad, Arshad Shahidakhtar	IN PROGRESS	Modify	Delete	Print PA
	05/25/2010	test		Wan, Yifei	oser approval rejected by CELESTEB2 on 29-JUN-2010	Modify	Delete	Print PA
GR000285		test		Sayyad, Arshad Shahidakhtar	IN PROGRESS	Modif	Delete	Print PA

• The rejected PA will contain comments so the initiator can make the appropriate corrections.

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• Once the PA is modified, it must be re-routed to all approvers again.

#### **Archived Items**

- Completed PAs (defined as, PAs approved by department(s), GPS, Research Accounting and Payroll) will be 'archived.'
- Archived PAs will disappear from the initiator's queue.
- All archived PAs can be search for in the '*Web Personnel Actions List*' on the HR/Payroll tab of web apps.
- Both the initiator and other department users can search for department PAs.

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Position Incumbent	Opens in Excel		
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Web Personnel Actions List (under Queries on HR/Payroll tab)

- PA searchable fields are by: Dates, Fund, Org, Initiator, Student, PI, and/or Advisor.
- The Graduate Payroll Authorization button must be selected.
- Select the Graduate PA status whether the PA is **In Progress**, **Completed or All.** Completed PAs will display "completed" at the bottom of the PDF.
- Archived PAs, they will no longer show on the initiator's grad PA menu.

	Web Personnel Actions List	
	From	То
Last Transaction Date (MM/DD/YYYY):	03/25/2011	03/25/2011
Fund Code (Leave blank to select all):		List Funds
Orgn Code (Leave blank to select all):		List Orgns
Initiator (Leave blank to select all):		List Initiators
ID (or Last Name for Employee Search):		Employee Search
Document Type:	Graduate Payroll Authorization ***	
	*** Additional parameters for Graduate	e PAs
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I	Reset Submit	

WEPALIST Installed 01/26/2011 07:45:52 pprd - Created 2011/01/02

Once parameters are selected, the Web Personnel Actions List will display:

- PA document number assigned by Banner
- Employee the student
- Document type Graduate Payroll Authorization Form or other kind of online PA
- Initiator
- Start date the date the PA was started
- Transaction date the date the PA posted
- Description entered by the initiator when the action was started
- Status status of the PA
- Current Owner

#### To view PDF, click on the blue document number.

				Adviso	r (ID or Last N	ame Search):	List Adv.	
					Gradua	te PA Status: O In Progress O Complete	⊙ All	
					Reset Sub	mit		
Banner Document	Employee	Document Type	Initiator	Start Date	Transaction Date	Description	Status	Current Owner
GR003099	Stark, Daniel	Graduate Payroll Authorization Form	Cantu, Umbe O.	28-FEB-11	25-MAR-11	Dan Stark stipend/redistribution	approval rejected by PAYROLL on 15-MAR-2011	UMBE
GR003180	Davis, Erik	Graduate Payroll Authorization Form	Louie, Sylvia	24-MAR-11	24-MAR-11	Davis	approval requested of PAYROLL on 24-MAR-2011	LOUIES
GR003181	Lewicka, Zuzanna Anna	Graduate Payroll Authorization Form	Wilkes, Cynthia (Approvals)	24-MAR-11	24-MAR-11	tuition	IN PROGRESS	CWILKES2
GR003175	Bertolusso, Roberto Lucio Maria	Graduate Payroll Authorization Form	Almendarez, Rosalva	23-MAR-11	23-MAR-11	Bertolusso-rev.Sp11 (R83940&R21530)	approval granted by PAYROLL on 23-MAR-2011	ALMENDAR
GR003176	Gallardo Palacios, Ricardo Alfonso	Graduate Payroll Authorization Form	Lawrence, Daria	23-MAR-11	23-MAR-11	Gallardo rev.AY11	approval granted by PAYROLL on 24-MAR-2011	DARIA

#### **Approval Process for Approvers**

• Email Notification - Approver will get an email from Admin Systems with the subject line: Graduate PA Approval Request. They can access the PA by following a link in the email, or under web entry in the HR/Payroll tab in web apps, or in the workflow tab in web apps.

**Approver's Menu** – When approvers log into web apps, their Graduate Payroll Authorization Form menu will have two sections.

- Top Section PAs that have been initiated by the user (if any). For faculty and non-initiators, the top section will be blank.
- Graduate PA \*TEST PHASE 3 PILOT\* Microsoft Internet Explorer <u>File Edit View Favorites Tools Help</u> 🔇 Back 🔹 🕑 🔹 😰 🏠 🔎 Search 🤺 Favorites 🚱 🔗 👟 📃 🋍 🖓 Address 🕙 https://testweb.rice.edu/banwebdevl/pwepagrad\_test.main 🗸 🔁 Go 🛛 Links **Initiator's** ACE UNIVERSITY Enance | HR/Payroll | Student | Financial Aid | Oracle Reports | Site Map Section Wilkes, Cynthia 28-Jun-2010 12:00:48 PM **\*TEST PHASE 3 PILOT** Description (up to 35 chars) Student Status Action Banner Start Date Document (up to 8 chars) 06/28/2010 Clear New DOC 20100518114241 IN PROGRESS 05/18/2010 test Modify Delete 20100519104848 05/19/2010 IN PROGRESS test Lin. Adam Y Modify Delete Print PA GR000231 05/12/2010 test Terentvey, Igor Sergevevich IN PROGRESS Modify Delete Print PA GR000249 05/19/2010 test Sayyad, Arshad Shahidakhtar IN PROGRESS Modify Delete Print PA GR000285 05 Wan, Yifei IN PROGRESS Modify Print PA Delete **Approver's** Graduate PAs Awaiting Your Approval Section Dept Ref (up to 8 chars) Banner Star Student Status Action Document GR000314 06/01/201 ADMINSYSTEMS TEST ASYSTEST Cuchiara, Michael Paul approval requested by MAJ1 on 17-JUN-2010 Display PA Print PA ADMINSYSTEMS TEST approval requested by MAJ1 on 17-JUN-2010 GR000322 06/17/2010 Gao, Liang Display PA Print PA ADMINSYSTEMS TEST GR000324 06/18/2010 Gao, Liang approval requested by MAJ1 on 18-JUN-2010 Display PA Print PA GR000325 06/18/2010 ADMINSYSTEMS TEST Gao, Liang approval requested by MAJ1 on 18-JUN-2010 Display PA Print PA GR000326 06/18/2010 ADMINSYSTEMS TEST approval requested by MA11 on 18-1UN-2010. Gan. Liang Display PA Print PA GR000327 06/18/2010 ADMINSYSTEMS TEST Gao, Liang approval requested by MAJ1 on 18-JUN-2010 Display PA Print PA GR000328 06/18/2010 ADMINSYSTEMS TEST Gao, Liang approval requested by MAJ1 on 18-JUN-2010 Display PA Print PA GR000334 06/25/2010 ADMINSYSTEMS TEST approval requested by MAJ1 on 25-JUN-2010 Gao, Liang Display PA Print PA WEPAGRAD Installed 06/21/2010 15:05:24 devl - Created 05/29/2010 Administrative Systems | Submit a Request/Problem Administrative Systems 250 Allen Center, MS 97 ©2000 Rice University 🔒 🥝 Internet
- Bottom Section PAs awaiting their approval

## • Approving PAs

Once the approver has reviewed the PA, they can either approve or reject it. If there are corrections to be made, they must reject the PA with comments. The initiator will make the appropriate changes and resubmit it. Only the initiators can make changes, other than simply adding comments. A rejected PA must be re-approved by everyone in the signature queue.

• **Display PA Button**: Click Display PA to review the PA. Verify time periods, funding sources, account codes, etc.

- **Approve PA button**: At the bottom of the screen, click to approve. PA will automatically forward to the next approver in line. No further action needed.
- **Reject PA button**: To reject the PA, add a comment explaining the rejection in the Remarks / Text section and click the **Reject PA** button. Comments are mandatory for a rejection so as to give instructions to the initiator. If you click Reject PA without comments, you will get this error message:



• Enter comment in the remarks box and click the **Reject PA** button again.

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#### **Automatic Email Notifications**

Automatic email notifications will be sent as FYIs to the following individuals for students, who had their stipend funds changed, added or terminated:

- 1. The **PI** (primary investigator) of a research fund, if there is one. If there are co-PIs, it will only go to the primary PI.
- 2. If there is no PI on the fund, but there is a **financial manager** assigned to the fund in Banner, the financial manager will receive the notification.
- 3. If there is no PI or financial manager, the notification will go to the student's **advisor** (if there is one assigned in Banner).

Automatic email notification will be generated:

- 1. When a grad PA or reallocation has been completed and posted in Banner during the previous week.
- 2. One email notification per person will cover all students and all PAs completed during the given week.

The email will include a list of students who have had actions taken in the past week. The information included for each student will be:

Dear Paula Sanders,

You are receiving this notification because you are the Principal Investigator/Financial manager on a fund(s) being used to pay a graduate student stipend(s) or the Graduate advisor for a student.

The following Graduate Student Payroll Authorization(s) were processed during the period 02/14/2011-02/21/2011

Student Name :Mickey Mouse Fund/Orgn :R3C032/246000 Fund Title :NSF GRFP Job Title :NSF Fellow Begin Date :01-JAN-11 End Date :31-MAY-11 Change Reason :Appointment extension PA Doc: :GR002991 Initiator Name :Cynthia Wilkes Initiator Phone :5812 https://webapps2.rice.edu/banweb/pwrpapdf.main?p header id=GR002991&p action=QUERY

Also paid on A1 246000, Rice Fellow from 01-JAN-11 to 31-MAY-11.

Please contact the Graduate Student Payroll Authorization initiator for more information.

NOTE: Federal regulations require that students and postdocs supported by NSF or NIH projects must be able to certify that they have completed training in responsible conduct of research (RCR). Training should be completed prior to beginning work on an NSF or NIH award. RCR training is available at <u>www.citiprogram.org</u>, with more information about Rice RCR requirements at <u>http://osr.rice.edu</u>.

Thank you for your time and attention.

Example: PDF of a fully processed and archived PA:

Last Revised Dat	e: 03/26/201	2	Graduat	e Student J	Payroll Auth	orization	1 Print ]	Form		Docum	ent No: G	R007152	
Contact Informa	tion												
Department Con	tact Person:	Baylo	or, Sandra						P	hone #:	6210		
Department Initi	ating PA:	Civil	and Enviro	onmental E	ngineeı				М	ail Stop	: MS-31	7	
Graduate Studen	t Advisor:	No A	dvisor Ass	igned									
otudent Informa	tion												
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