

EPAF Self Service User Guide



Documentation Change Report

Changes	Author	Date
Update - documentation with new content	Heather Cooke	September 2019
and branding		
Added – when doing a mass upload make	Heather Cooke	September 2019
sure the program code field is blank		
Update new process flow for approvals –	Heather Cooke	October 2019
TA/RA and Sessionals		
Update – Required Home Organization	Heather Cooke	March 2020
for New Hires		
Added – New OPSEU position codes	Heather Cooke	May 2020
Update - moved out the comment section	Heather Cooke	June 2020
and placed in common functions		
Update – Sessional process to include	Samantha	March 2021
co-teach directions	Woitzik	



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Overview

This document is to be used by the individual entering EPAFs in Self-Service. The document contains the following:

Creating an EPAF for:

- New Hire Salary and Hourly
- Rehire Hire Salary and Hourly
- o Change in Job
- o Termination
- Approval Process
- o EPAF Correction

What you need to do first

Before entering in EPAF you will require the following information:

- Consult with Human Resources to provide the correct category and rate of pay for the individual
- Position title
- Position number (Consult EPAF Summary sheet)
- Annual salary or hourly rate (Consult EPAF Summary sheet)
- Start and end dates of contract
- Banner ID of individual **
- Account code to be charged

NOTE: New hires may not have a Banner ID. Please contact **HR and provide them with the employee's full name, address, date of birth and SIN.



Entering EPAF

Field/ Step	Field Entry		Page View	
Log in to MyCampus	Enter Banner ID and MyCampus password	MyCampus Secure login Username 1 Password CANCEL Locket Please note: It is important to change your default password as soon as possible for security purposes. Locked out of your account? Forgot your password?	The password is defaulted to either your birthdate (mmddyy) or postal code (uppercase no spaces).	
Self	Select Self	Reset it now.		
Service Options	Service Options icon	My Campus My Account Vou are currently logged in OT Graduate Studies OT Graduate Studies	OT Undergraduate OT Documents OT Student Life OT Awards and Financial Aid OT Services	
Employee	Select Employee	MyCompute 101 Initial States Take Personal Information Compare States Take Compare States Take Personal Information Compare States Take Personal Information Times Shorts, EPAFs and Fay Information Times Shorts, EPAFs and Fay Information	ne seven contact information or name change information.	C.
Employee Main Menu	Select OT Employee Self Service	MyCampus Tel Terry Roder Tab Employee Main Menu Durhan College Employee Self Service UDT Employee Self Service UDT Employee Self Service	But Technol Galaxies	



Field/ Step	Field Entry	Page View
OT	Select Electronic	MyCampus
Employee	Personnel Action	East to UCT Or solute Rules Tab
Main Menu	Form	UOIT Employee Main Menu
		Electronic Personnel Action Form
		New Information
		Use this link to produce an on-demand copy of a student's T2202A
Once you h	ave entered the Ele	ectronic Personnel Action Form you can access the following pages:
	EPAF Approver	MyCampus
	Summary	RE Bolto VOT Graduate Staties Tab
		Electronic Personnel Action Form
		EPAF Approver Summary
		Cert Organized animaly New EPAF EPAF Proxy Records
		Act as a Proxy
		 Shows the EPAs' that are pending approval
	EPAF Originator	MyCampus
Flootropio	Summary	In the test to the second seco
Personnel		Electronic Personnel Action Form
Action Form		FBAE Anormany
		EPAF Proy Records
		Act as a Proxy
		- If you have created an EPAF and you are the owner it will appear in the summary
		1) Betts 20 UII deales Bude Tab UII deales Bude Tab
		Electronic Personnel Action Form
		EPAF Approver Summary
		New EPAF
		Act as a Proxy
		- Create a new EPAF



EPAF Approval Summary Process

Step	Page View	
Click on EPAF Approver Summary	Electronic Personnel Action Form EPAF Approver Summary EPAF Originator Summary New EPAF EPAF Proxy Records Act as a Proxy RELEASE: 8.5	
Click on In My Queue tab	EPAF Approver Summary	
Click on the name (hyperlink) of the person you want to approve a contract for. Verify the table provided is correct.	EPAF Preview ✓ You are acting as an Approver. Name and ID: Joe Black, 100570620 Job and Suffix: 6A9983-00, AT/Def Term*Human Resources Transaction: 23716 Query Date: Jul 01, 2014 Transaction Status: Pending Last Paid Date: Approval Category: AT - Terminate Job (Stop Pay), ATTERM Previous Next Image: Next Image	



	00 AT/Def				
	Term*Human Bocourcoc				
	Enter Changes	Current Value	New Value		
	Job Change Reason:		ETOD		
	Job End Date:	09/25/2015			
	Pay Effective Date:	(09/13/2014		
	Job Status:	1	Leave without Pay, without Benefits		
	Enter New Contract End Date, 6A9983 - - 0 AT/Def Term*Human Resources Enter Changes Job Change Reason:	Current Valu	e New Value		
	Pay Effective Date:		09/14/2014		
	Personnel Date:		09/14/2014		
	Job Status: 🜟		Leave without Pay, without Benefits		
If all the information is correct, click Approve. You will receive the following message	✓ You are acting ✓ This transaction ✓ Transaction su	as an Approver on must be upda accessfully comp	r. ated on the Electronic Personnel Actio l <mark>eted.</mark>	n Form, NOAEPAF.	

Returning an EPAF for Correction

Step	Page View		
Click on the name of the person you want to approve a contract for	Crompton, Caitlin M. 100318359 Prof Mgr - Rehire Dec 03, 2012 PM/Def Term*FBIT, 5A9969-00 9017 Prof Mgr - Rehire Dec 03, 2012		
Review the details of the contract. If something needs to be changed in the table; click on the Return for Correction button	✓ You are acting as an Approver. Name and ID: Caitlin Marie Crompton, 100318359 Job and Suffix: 5A9969-00, PM/Def Term*FBIT Transaction: 9017 Query Date: Dec 03, 2012 Transaction Status: Pending Last Paid Date: Approval Category: Prof Mgr - Rehire, PMXEMP Previous Next Return for Correction More Info Add Comment 		



Step	Page View		
Click on Add Comment link and outline what changes need to be made to the EPAF	Contract and date needs to be changed to September 30, 2013 30 Previous Comments Date: Sep 26, 2013 03:37:50 PM Made by: Jule Day, HRADM6 Comments: Contract end date needs to be changed to September 30, 2013 JD		
Click on the Save button			
You will see the Routing Queue has been changed in the EPAF	Routing QueueApproval LevelNameRequired ActionQueue StatusAction DateHR Advisor, 10Joanne Evans, HRADM8FYIAcknowledgedDec 03, 2012 11:27:51 AMDepartmental BPO's, 20 Belinda Bambrick, UBUSADM3 FYIAcknowledgedDec 03, 2012 11:27:51 AMHR Department, 50Julie Day, HRADM6ApproveReturn for Correction Sep 26, 2013 03:28:57 PMHR Apply, 90Jennifer Aquilo, HRISUSRApplyRemoved from Queue Sep 26, 2013 03:28:57 PM		
An email no	otification will go to the initiator so they can make the necessary updates		
The initiator will go into EPAF Originator Summary and see the EPAF returned for correction	EPAF Transactions A Name ID Transaction Type of Change Submitted Date Effective Date Transactio V <t< td=""></t<>		
The initiator can click on the EPAF to make changes and then click the Update link to initiate the change then resubmit	✓ You are acting as an Originator. Name and ID: Caitlin Marie Crompton, 100318359 Job and Suffix: SA9969-00, PM/Def Term*FBIT Transaction: 9017 Query Date: Dec 03, 2012 Transaction Status: Return for Correction Last Paid Date: Approval Category: Prof Mgr - Rehire, PMXEMP Next ● Void Update Add Comment NOTE: Ensure iob labour distribution effective date is the same as the query date.		
Once the Manager receives the corrected EPAF they are able to approve it by clicking on the Approve button	You are acting as an Approver. Name and ID: Caitlin Marie Crompton, 100318359 Job and Suffix: SA9969-00, PM/Def Term*FBIT Transaction: 9017 Query Date: Dec 03, 2012 Transaction Status: Pending Last Paid Date: Approval Category: Prof Mgr - Rehire, PMXEMP Previous Next @ Approve Disapprove Return for Correction		
A PDF letter is generated and sent to the initiator via email, as well as an email confirming the EPAF has been approved			



NOTE: NEVER Cancel a contract. This option does not apply the cancel action. You must VOID a contract if no longer required.

Adding a Comment to an EPAF

When adding comments (optional) to an EPAF it is standard across all categories. It is used to give the EPAF user additional information about changes or updates that are required to the EPAF

Step	Field Entry	Page View
Click	Add Comment	
Enter	Additional details as needed	Comment
	to the EPAF user	
Click	Save and then scroll to the	
	top of the page	~
Click	Submit	Approval Types Account Distribution Routing Queue Comments Transaction History
		Save
		Return to Top
		✓ Your change was saved successfully.
		Renter the information for the EPAF and either Save or Submit
		Name and ID: Angela Rhonda Anaconda, 100729832
		Transaction: 75014 Query Date: Sep 04, 2018
		Transaction Status: Waiting
		Approval Category: TA - New Hire, TANEMP
		Save Submit Delete



Table A – Approval Type Categories

The following are the definition of the approval categories:

- New Hire Never worked at the University
- Rehire Has worked at the University somewhere. May not have held this position
- Change Job Hours Change Hours change only
- Change Job Job info change
- Terminate Job Early termination of contract

Approval Category Code	Description
TANEMP	Teaching Assistant - New Hire
	Teaching Assistant - Change Job - Hours
TACJOB	Change Only
	Teaching Assistant - Change Job - All other
TANJOB	changes
TATERM	Teaching Assistant - Terminate Job
TAXEMP	Teaching Assistant - Rehire
RANEMP	Research Assistant - New Hire
	Research Assistant - Change Job - Hours
RACJOB	change only
	Research Assistant - Change Job - All other
RANJOB	changes
RATERM	Research Assistant - Terminate Job
RAXEMP	Research Assistant - Rehire
SSNEMP	Sessional Lecturer - New Hire
<u>SSCJOB</u>	Sessional Lecturer - Change Job
<u>SSTERM</u>	Sessional Lecturer - Terminate Job
SSXEMP	Sessional Lecturer - Rehire
Note: AT positions have been	changed to NU. (S) – Salary and (H) - Hourly
ATNEMP	NU L9 & Below (S) - New Hire
ATNEEH	NU L9 & Below (H) - New Hire
ATCJOB	NU L9 & Below (S) - Change Job



Approval Category Code	Description
ATCJBH	NU L9 & Below (H) - Change Job
ATTERM	NU L9 & Below - Terminate Job
ATXEMP	NU L9 & Below (S) - Rehire
ATXEEH	NU L9 & Below (H) - Rehire
<u>PMNEMP</u>	NU L10 & Above (S) - New Hire
<u>PMNEEH</u>	NU L10 & Above (H) - New Hire
PMCJOB	NU L10 & Above (S)- Change Job
<u>PMCJBH</u>	NU L10 & Above (H)- Change Job
<u>PMTERM</u>	NU L10 & Above -Terminate Job
<u>PMXEMP</u>	NU L10 & Above (S)- Rehire
<u>PMXEEH</u>	NU L10 & Above (H)- Rehire
** The below O9 and O8 code	es have the same process as the NU positions
above	
<u>O9CJBH</u>	9H L9 & Below (H)- Change Job
O9CJOB	9A L9 & Below (S)- Change Job
<u>O9NEEH</u>	9H L9 & Below (H)- New Hire
<u>O9NEMP</u>	9A L9 & Below (S)- New Hire
<u>O9TERM</u>	OP L9 & Below- Terminate Job
<u>O9XEEH</u>	9H L9 & Below (H)- Rehire
O9XEMP	9A L9 & Below (S)- Rehire
O8CJOB	O8 L10 & Above (S)- Change Job
<u>O8CJBH</u>	8H L10 & Above (H)- Change Job
<u>O8NEEH</u>	8H L10 & Above (H)- New Hire
<u>O8NEMP</u>	8A L10 & Above (S)- New Hire
<u>O8TERM</u>	O8 L10 & Above -Terminate Job
<u>O8XEEH</u>	8H L10 & Above (H)- Rehire
8AXEMP	8A L10 & Above (S)- Rehire
PDNEMP	Post-Doctoral Fellow - New Hire



Approval Category Code	Description
PDCJOB	Post-Doctoral Fellow - Change Job
<u>PDTERM</u>	Post-Doctoral Fellow - Terminate Job
PDXEMP	Post-Doctoral Fellow - Rehire
RSNEMP	Research Associates - New Hire Salary
<u>RSNEEH</u>	Research Associates - New Hire Hourly
<u>RSCJOB</u>	Research Associates - Change Job Salary
<u>RSCJBH</u>	Research Associates - Change Job Hourly
RSTERM	Research Associates - Terminate Job
RSXEMP	Research Associates - Rehire Salary
<u>RSXEEH</u>	Research Associates -Rehire Hourly
AQNEMP	Additional Qualifications - New Hire
AQCJOB	Additional Qualifications - Change Job
AQTERM	Additional Qualifications - Terminate Job
AQXEMP	Additional Qualifications - Rehire
AANEMP	Academic Associate - New Hire
AACJOB	Academic Associate - Change Job
AATERM	Academic Associate - Terminate Job
AAXEMP	Academic Associate - Rehire
<u>CHNEW</u>	Coach New Hire
CHXEMP	Coach Rehire
CUNEW	Casual – New Hire
<u>CUCHG</u>	Casual – Change Job
CUTERM	Casual – Terminate Job
<u>CUREH</u>	Casual - Rehire
** The below codes have the	same process as the Casual positions above
INNEW	Invigilator – New Hire
INCHG	Invigilator – Change Job
INTERM	Invigilator – Terminate Job
INREH	Invigilator - Rehire



Teaching Assistant - New Hire – (TA – New Hire, TANEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying glass icon to search by name	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
Query Date	Enter contract start date. Usually the start date of the semester	∗ - indicates a required field.
Approval Category	Select TA – New Hire, TANEMP	ID: * 100729832 Angela Rhonda Anaconda
Click	Go	Query Date: MM/DD/YYYY* 09/04/2018
		Approval Category: * TA - New Hire, TANEMP
		Go
		$^{\wedge}$ There are no active jobs based on the Query Date.
		All Jobs
Click	All Jobs. NOTE: This is a double check to	
	confirm the person has not held any	${}^{ rede \Delta}$ There are no active jobs based on the Query Date.
	other position at the university	
Position	Enter position number as indicated by	Reference or search for a new position number and enter the suffix, or select the link under Title.
	EPAF Summary sheet	ID: Angela Rhonda Anaconda, 100729832
Suffix	Enter '00' as the suffix number	Query Date: Sep 04, 2018
		Approval Category: TA - New Employee Hire, TANEMP
Select	Automatically selected	TA - New Hire, TANEP2
	0	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
Click	Go	New Job 5T5999 00 Teaching Assistant 2200, Faculty of Business and IT (
		⚠️ There are no active jobs based on the Query Date.
		All Jobs
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Sex	Copy Current Value or select from	
	dropdown	



SSN/SIN/TIN	Enter SIN
Birth Date	Enter Birth Date
Citizenship	Select from dropdown. Always use 0, for
	Canadian citizen
Current Hire Date	Leave as default
Pay Effective Date	Leave as default
Personnel Date	Leave as default
Job Begin Date	Leave as default
Total Contract Hours	Enter total hours of the contract
Hours per Pay (2 wks)	Leave as default
Hourly Rate	Enter based on TA/RA rates based on CA
Contract Type	Select Primary
Employee Status	Leave as default
Employee Class Code	Leave as default
District Code	Not enterable
Home COAS	Not enterable
Home Org.	Enter or click on magnifying glass icon and select the correct home organization code for faculty/dept.
Factor	Not enterable
Pays	Not enterable
Course	Enter four digit code followed by a
Number	capitalized "U" or "G"(e.g. 1010U)
Subject Code	Enter the four capital letter code (e.g. BUSI)

TA - New Hire, 5TS999-00 Teaching Assistant

Item	Current Val	ue Ne	w Value
Job Change Reason: 🜟			72, Contract Position
Sex: \star	Female		Not Selected V
SSN/SIN/TIN: \star	123456789		
Birth Date: MM/DD/YYYY <mark>*</mark>	11/18/1996		
Citizenship: 🜟			Not Selected
Current Hire Date: MM/DD/YYYY			09/04/2018
Pay Effective Date: MM/DD/YYYY*			09/04/2018
Personnel Date: MM/DD/YYYY			09/04/2018
Job Begin Date: MM/DD/YYYY			09/04/2018
Total Contract Hrs: 🜟			
Hours per Pay(2 wks):			
Hourly Rate: 🜟			
Contract Type: \star			Primary V
Employee Status:			Active 🗸
Employee Class Code:		Q	50
District Code: (Not Enterable)			OIT
Home COAS: (Not Enterable)			U
Home Organization: (Not Enterable))		3700
Step:			0
Factor: (Not Enterable)			1
Pays: (Not Enterable)			1
Course Number:			
Subject Code:			



Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as Query Date)	Current Effective Date: 09/04/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
COA	Leave as default	New
Fund	Defaults from position and faculty/dept	Effective Date: MM/DD/YYYY 09/04/2018
Organization	Update with the correct organization. If	
	you are not sure please contact	
	Financesystems@uoit.ca	
Account	Defaults from position and faculty/dept	
Program	Remove Program code and leave	100.00
	blank	Default from Teday Caus and Add New David
	NOTE: Will populate when you click	Default from moex Save and Add New Rows
	Save	
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance	Leave as default	
Override End		
Date		
Default from	Do not select	
Index and Save		
and Add New		
Rows		



Field/ Step	Field Entry	Page	e View						
Job Change Reason	Leave as default								
Job Status	Not enterable	Enter Job END Information, 5TS999-00 Teaching Assistant							
Job End Date	Not enterable	Item	Current Value New Value						
Pay Effective Date	Enter the contract end date	Job Change Reason:	73, Contract Completion 🗸						
	of the semester, contract end	Job Status: (Not Enterable)	Т						
	dates for Academic Year	Job End Date: MM/DD/YYYY(Not Enterable)							
Personnel Date	Enter as the contract end	Pay Effective Date: MM/DD/YYYY	12/21/2018						
	date of the semester per Academic Year	Personnel Date: MM/DD/YYYY	12/21/2018						

Teaching Assistant - Hours Change – (TA – Hours Change, TACJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying glass	👎 Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	icon to search by name	* - indicates a required field.
Query Date	Enter effective date to reflect when the	
	hours of the contract changed	100. * 100/29832 Angela Rhonda Anaconda
Approval	Select TA – Hours Change, TACJOB	Query Date: MM/DD/YYYY* 11/27/2018
Category		Approval Category: * TA - Hours Change, TACJOB
Click	Go	Go
		Employee Job Assignments
		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status
		Primary 5TS999 00 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
		Secondary 5TS999 01 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
		All Jobs
Position	Leave as default	
Suffix	Leave as default	
Select	Position which requires an hours change	



Click	Go	🔍 Enter	Enter or search for a new position number and enter the suffix, or select the link under Title.								
		ID:		Angela R	honda /	Anaconda, 1007298	32				
		Query	Date:	Nov 27, 2	2018						
		Approv	/al Catego	ry: TA - Hou	rs Chan	ge, TACJOB					
		IA - Ch Search	g Job Dat Type	a, TACJB2 Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date Status	Select
		Q	New Job				Thire briede organization	otart bate	Lind Dute		Joeleet
											0
			Primary	5TS999	00	Teaching Assistant	3700, Human Resources	Aug 25, 2018	Dec 28, 2018	Active	0
			Secondary	5TS999	01	Teaching Assistant	3700, Human Resources	Aug 25, 2018	Dec 28, 2018	Active	۲
		All Job	s		1			1	1		

Field/ Step	Field Entry		Pa	ge View	
Job Change Reason	Select hours change reason 111 from dropdown	TA - Chg Job Data, 5TS999-01 Teaching Assistant			
Pay Effective	Leave as default	Item	Current Value N	lew Value	
Date		Job Change Reason: *	72	111, Change in Contract Hours	
Personnel Date	Leave as default	Pay Effective Date: MM/DD/YYYY	08/25/2018	11/27/2018	
r croonner Date		Personnel Date: MM/DD/YYYY	09/04/2018	11/27/2018	
		Total Contract Hrs:	70	140	
		Hours per Pay(2 wks):	7.78		
		Hourly Rate:	36	36	
		Contract Type:	Secondary	Secondary V	
		Step:	0	0	
		Job Status:	Active	Active V	
		Home COAS:	U C	l U	
		Home Organization:	3700, Human Resources 🔾	3700	
		Factor: (Not Enterable)	9	1	
		Pays: (Not Enterable)	9	1	
		Course Number:		1020U	
		Subject Code:		BUSI	
Total Contract	Enter the revised total hours. For]			
Hours	example, if the original hour were 150				
	and you need to add 14 more hours to				
	the contract onter 164 hrs				



Hours per Pay	Leave as default (automatically
(2 wks)	calculates)
Hourly Rate	Enter based on TA/RA rates for year
Contract Type	Select Secondary
Step	Leave as default
Job Status	Leave as default
Home COAS	Leave as default
Home	Enter or click on magnifying glass icon
Organization	and select the correct home
	organization code for faculty/dept.
Factor	Not enterable
Pays	Not enterable
Course Number	Enter four digit code followed by a
	capitalized "U" (e.g. 1010U)
Subject Code	Enter the four capital letter code (e.g. BUSI)

Field/ Step	Field Entry						P	Page Vi	ew					
Effective Date	Leave as default (same as Query Date)	Curre	nt ius Datas d	0/05/0010										
COA	Leave as default	COA I	ndex Fund	Organizatio	n Account Pro	gram Activity	y Location Proj	ect Cost Perc	ent Encumbr	ance Overri	de End Da	ite		
Fund	Defaults to type of position and faculty	U	10000	0 2200	62020 10			100	0.00					
Organization	Defaults to type of position and faculty/dept	New Effecti	ve Date: MM	I/DD/YYYY 11/	27/2018									
Account	Defaults to type of position and		Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Ov	erride End Date
	faculty/dept			Q	Q	Q								
Program	Defaults to type of position and	۵ ۵			Q								1	
-	faculty/dept. NOTE: When doing mass	٩ 🗌		Q	٩	Q		٩,						
	uploads, leave the Program code blank										Total:	100.00	1	
Activity	Leave as default unless BPO	🕑 Defa	aulting valu	es for Labor Dis	stribution from t	he Job record	s.							
-	recommends otherwise	Defau	It from Inde	Save and Ad	ld New Rows									
Location	Leave as default													
Project	Leave as default													
Cost	Leave as default													
Percent	Leave as default													



Encumbrance Override End Date	Leave as default
ate efault from	Do not select
dex and Save	
Rows	

Field/ Step	Field Entry	Page View
Effective Date	Enter as Query Date	Current Effective Date Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date
Earnings	Leave as default	08/25/2018 RTA, Research, Teaching Assistants 7.78
Hours or Units Per Pay	Leave as default	New Value Effective Date MM/DD/YYYY Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date MM/DD/YYYY Remove
Deemed Hours column	Leave as default	Vol.25/2016 Intra, rescently Assistents 7.78 1 Not Selected V 1 1
Special Rate column	Leave as default	Not Selected
Shift column	Leave as default	
End Date column	Leave as default	
Save and Add New Rows	Do not select	Defaulting values for Default Earnings from the Job records. Save and Add New Rows

Field/ Step	Field Entry	Page View						
Job Change	Leave as default	Enter Job END Information, 5TS999-01 Teaching Assistant						
Reason				-				
Job Status	Not enterable	Item	Current Value	New Value				
Job End Date	Not enterable	Job Change Reason:	72	73, Contract Completion				
Pav Effective	Enter the contract end date, end of	Job Status: (Not Enterable)	Active	Т				
Date	semester date for the Academic Year	Job End Date: MM/DD/YYYY(Not Enterable) 12/28/2018					
		Pay Effective Date: MM/DD/YYYY*	08/25/2018	12/28/2018				
Personnel Date	Enter the contract end date, end of	Personnel Date: MM/DD/YYYY*	09/04/2018	12/21/2018				
	semester date for the Academic Year							



Field/ Step	Field Entry				Page View		
Approval Level –	The BPO's name should appear	Routing Queue					
Top Row		Approval Level		User Name		Required Action	Remove
Required Action	Leave as default	20 - (BPO) Departmental BPO's	•	USCBPO	Heather Lee Cooke	Approve	•
		90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UQIT HRMEP	Apply	
Approval Level –	Dept. Approver – EPAF creator	Not Selected	۲	Q		Not Selected	•
Second Row		Not Selected	•	Q		Not Selected	•
Dequired Action	Leove en default	Not Selected	٠	٩		Not Selected	•
Required Action	Leave as delault	Not Selected	٠	Q		Not Selected	•
Approval Level –	HRCATALOGUOIT						
Third Dow							
THILL KOW							
		4					
Required Action	Leave as default						
Save and Add	Do not select						
Now Powe							

Teaching Assistant - Job Info Change (TA – Job Info Change, TANJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or select magnifying glass	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	icon to search by name	* - indicates a required field.
Query Date	Enter effective date to reflect when the	ID: * 100729832 Angela Rhonda Anaconda
	hours of the contract changed	Query Date: MM/DD/YYYY* 11/27/2018
Approval	Select TA – Job Info Change, TANJOB	Approval Category: * TA - Job Info Change, TANJOB
Category		Go
Click	Go	Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 5TS999 0.0 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active Secondary STS999 0.1 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active All Jobs All Jobs All Jobs All Jobs All
Position	Leave as default	
Suffix	Leave as default	
Select	Select position which requires an info change	



Click	Go	There or search for a new position number and enter the suffix, or select the link under Title. The Angela Rhonda Anaconda, 100729832 Query Date: Nov 27, 2018 Approval Category: TA- Job Info Change, TANJOB The Rest of a table to table t										
		<i>TA - Ch</i> Search	g Job Dat Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
		Q	New Job									0
			Primary	5TS999	00	Teaching Assistant	3700, Human Resources	Aug 25, 2018	Dec 28, 2018		Active	۲
			Secondar	y 5TS999	01	Teaching Assistant	3700, Human Resources	Aug 25, 2018	Dec 28, 2018		Active	0
		All Jobs	; oproval Typ	oe Go		L						

Field/ Step	Field Entry		Pa	age View
Job Change Reason	Select hours change reason - 137 from dropdown	TA - Chg Job Data, 5TS999	-00 Teaching Assista	ant
Pay Effective	Leave as default	Item	Current Value	New Value
Date		Job Change Reason: 🜟	72	Not Selected
		Pay Effective Date: MM/DD/YYYY	08/25/2018	11/27/2018
Personnel	Leave as default	Personnel Date: MM/DD/YYYY	09/04/2018	11/27/2018
Date		Total Contract Hrs:	140	
Date		Hours per Pay(2 wks):	15.56	
		Hourly Rate:	36	
		Contract Type:	Primary	Not selected V
		Step: (Not Enterable)	0	0
		Job Status:	Active	Active 🗸
		Home COAS: (Not Enterable)	U	U
		Home Organization: (Not Enterable) 3700, Human Resources	3700
		Factor: (Not Enterable)	9	
		Pays: (Not Enterable)	9	
		Course Number:		
		Subject Code:		
Total	Enter the same amount from the Current			
Contract	Value column			
Laura				
Hours				
Hours per	Leave as default (automatically calculates)			
Pay (2 wks)				
Hourly Rate	Enter based on TA/RA rates for year			



Contract	Select S	Secondary	7											
Stop	Not Ent	orabla	-											
Job Status			-											
Homo COAS			_											
Home	Enter o	r click on magnifying glass icon	_											
Organization	and sol	act the correct home organization												
Organization	code fo	r faculty/dept												
Factor	Not ent	erable	-											
Pavs	Not ent	erable	-											
Course	Enter fo	our digit code followed by a	-											
Number	capitaliz	zed "U" (e.g. 1010U)												
Subject Code	Enter th	e four capital letter code (e.g.												
,	BUSI) a	is needed												
Field/ Ste	ер	Field Entry					F	Page Vi	ew					
Effective Date		Leave as default (same as query	Current											
		date)	COA Index	ate: 08/25/2018 Fund Organizati	on Account Pro	gram Activity	/ Location Proj	ect Cost Perc	ent Encumbr	ance Overr	ide End Da	ate		
COA		Leave as default	U	100000 2200	62020 10			100	.00					
Fund		Defaults to type of position and	New											
		faculty	Effective Da	te: MM/DD/YYYY 1	L/27/2018									
Organization		Defaults to type of position and	COA Ind	Lex Fund Q 100000	Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Ov	verride End Date
		faculty/dept		Q										
Account		Defaults to type of position and		~										
		faculty/dept	۹	٩	Q	Q	Q	Q			Totali			
Program		Defaults to type of position and									TULAI	100.00)	
		faculty/dept. NOTE: When doing	✓ Defaultin	g values for Labor D	istribution from	the Job record	s.							
		mass uploads, leave the	Default fron	n Index Save and A	dd New Rows									
		Program code blank	-											
Activity		Leave as default unless BPO												
		recommends otherwise	_											
Location		Leave as default	-											
Project		Leave as default	-											
Cost		Leave as default	4											
Percent		Leave as default												



Encumbrance Override End Date	Leave as default
Default from Index and Save and Add	Do not select
New Rows	

Field/ Step	Field Entry	Page View
Effective Date	Enter as query date	Current Effective Date Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date
Earnings	Leave as default	08/25/2018 RTA, Research, Teaching Assistants 1 15.56
Hours or Units Per Pay	Leave as default	New Value Hours or Units Per Pay Deemed Hours Special Rate Shift End Date MM/DD/YYYY Remove 11/27/2018 RTA, Research, Teaching Assistants 15.56 1
Deemed Hours	Leave as default	Not Selected
Special Rate	Leave as default	Not Selected
Shift	Leave as default	
End Date	Leave as default	
Save and Add New	Do not select	Not Selected V
Rows		✓ Defaulting values for Default Earnings from the Job records. Save and Add New Rows

Field/ Step	Field Entry			Page View				
Job Change Reason	Leave as default	Enter Job END Information, 5TS999-01 Teaching Assistant						
Job Status	Not enterable							
Job End Date	Not enterable	Job Change Reason:	72	73, Contract Completion				
Pay Effective Date	Enter as job end date of semester as per Contract End Dates for Academic Year	Job Status: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enterable Pay Effective Date: MM/DD/YYYY Personnel Date: MM/DD/YYYY	Active) 12/28/2018 08/25/2018 09/04/2018	T 12/28/2018 12/21/2018				
Personnel Date	Enter as contract end date of semester as per Contract End Dates for Academic Year							



Field/ Step	Field Entry				Page View		
Approval Level – Top Row	The correct BPO should	Routing Queue					_
	appear	Approval Level		User Name		Required Actio	n Remove
Required Action	Leave as default	25 - (25) Department Admin Appro	vers	A HRADM43	Heather Lee Cooke	Approve	•
Approval Level - Second	Dent Admin Approver	90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UOIT HRMEP	Apply	
Approval Level – Second		Not Selected	۲	٩		Not Selected	•
Row		Not Selected	•	٩		Not Selected	•
Deguined Action		Not Selected	•	٩		Not Selected	•
Required Action	Leave as default	Not Selected	•	Q		Not Selected	
Approval Level – Third	HRCATALOGUOIT						
Row							
Required Action	Leave as default						
Save and Add New Rows	Do not select						

Teaching Assistant - Terminate Job (TA – Terminate Job, TATERM)

Field/Step	Field Entry	Page View		
ID	Enter Banner ID or use magnifying glass icon to search by name	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.		
Query Date	Enter effective date of the change in	* - indicates a required field.		
Approval Category	Select TA – Terminate Job, TATERM	Query Date: MM/DD/YYYY* 11/28/2018		
Click	Go	Approval Category: * TA - Terminate Job, TATERM		
Position	Leave as default	 Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Angela Rhonda Anaconda, 100729832 		
Suffix	Leave as default	Query Date: Nov 28, 2018 Approval Category: TA - Terminate Job (Stop Pay), TATERM		
Soloct	The position to be terminated	Enter Job End Date for Pay Effective Date, GETRM		
Jeleci	The position to be terminated	Search ype Poston Sum rice Time sneet organization start pate Lind pate Last paid pate status service New Job		
Click	Go	Primary 5TS999 00 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active S		
		Secondary 5TS999 01 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active		
		All Jobs Next Approval Type Go		



Field/ Step	Field Entry			Page View
Job Change	Leave as default	Enter Job End Date for Pay E	ffective Da	ite, 5TS999-00 Teaching Assistant
Reason		Item	Currei	nt Value New Value
Job End Date	Enter data from Current Value	Job Change Reason:	72 rable) 12/28/	ETOD, Early Term Orig Date
Pay Effective Date	Enter as Job End Date from	Pay Effective Date: MM/DD/YYYY	08/25/	2018 12/28/2018 ×
	Current Value	Job Status:	Active	Leave without Pay, without Benefits V
Annual Salary	Entering data from Current Value	Annual Salary: (Not Enterable)	5041.4	4 0
Job Change	Indicate the change reason by	Enter New Contract End Date	e, 5TS999-	00 Teaching Assistant
Reason	selecting the appropriate dropdown	Item Cu	rrent Value	New Value
	option	Job Change Reason: * 72		ETND, Early Term New Date
Pay Effective Date	Enter as query date	Pay Effective Date: MM/DD/YYYY 08	/25/2018 /04/2018	11/28/2018
Personnel Date	Enter as query date	Job Status: * Ac	tive	Leave without Pay, without Benefits V
Job Status	Not enterable	Annual Salary: (Not Enterable) 50	41.44	0
Annual Salary	Entering data from current value			
	field			

Field/ Step	Field Entry	Page View	
Approval Level –	The correct BPO should appear	Routing Queue	_
Top Row		Approval Level User Name	Required Action
Required Action	Leave as default	20 - (BPO) Departmental BPO's Q HADDM6 Fun Bobby	Approve
		90 - (HR-APP) HR Apply HRCATALOGUOIT X UUTT HRMEP	Apply
Appioval Level –	INCATALOGUUII	Not Selected	Not Selected V
Second Row		Not Selected	Not Selected V
Required Action	Leave as default	Not Selected VQ	Not Selected
Save and Add New	Do not select	Save and Add New Rows	Not Selected
Rows			

Teaching Assistant - Rehire (TA – Rehire, TAXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use magnifying	
	glass icon to search by name	
Query Date	Enter contract start date. This is always	
	the begin date of the Semester	



Approval	Select TA – Rehire, TAXEMP	The Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
Category		* - indicates a required field.
Click	Go	ID: * 100729832 Angela Rhonda Anaconda
		Query Date: MM/DD/YYYY* 09/04/2018
		Approval Category: * TA - Rehire, TAXEMP
		Go
		Employee Job Assignments
		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status
		Primary 5TS999 00 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
		All Jobs
Position	Enter position number as indicated by	Enter or search for a new position number and enter the suffix, or select the link under Title.
	EPAF Summary sheet	ID: Angela Rhonda Anaconda, 100729832 Ouery Date: Sep 04, 2018
Suffix	Enter the suffix number.	Approval Category: TA - Prev Employee Rehire, TAXEMP
	Note: Click all jobs to ensure you are	TA - Dahira TAVENO
	using the correct suffix number.	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
	Duplicate suffixes causes failed	New Job 5TS999 01 Teaching Assistant 2200, Faculty of Business and IT
	contract completion	Primary 5TS999 00 Teaching Assistant 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
Select	Leave as default	
		Next Annoval Type Go
Click	Go	

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Current Hire	Leave as default	
Date		
Pay Effective	Leave as default	
Date		
Personnel Date	Leave as default	



Job Begin Date	Leave as default	TA - Rehire, 5TS999-01 T	eaching Assistant	
		Item	Current Value	New Value
		Job Change Reason: \star		72, Contract Position 🗸
		Current Hire Date: MM/DD/YYYY	09/04/2018	09/04/2018
		Pay Effective Date: MM/DD/YYYY	*	09/04/2018
		Personnel Date: MM/DD/YYYY*		09/04/2018
		Job Begin Date: MM/DD/YYYY*		09/04/2018
		Total Contract Hrs: *		
		Hours per Pay(2 wks):		
		Houriy Rate: *		Carandam. M
		Employee Status:	Active	Active
		Employee Class Code: *	5U, Teaching/Research Assistants	s Q 5U
		Home COAS:	U	QU
		Home Organization:	3700, Human Resources	Q 3700
		Step:		0
		Factor: (Not Enterable)		1
		Pays: (Not Enterable)		1
		Course Number:		
		Subject Code:		
Total Contract	Enter total hours			
Hours				
Hours per Pay	Leave as default (automatically			
(2 wks)	calculates)			
Hourly Rate	Enter based on TA/RA rates for year			
Contract Type	Select Secondary			
Employee	Leave as default			
Status				
Employee	Leave as default	1		
Class Code				
Home COAS	Not enterable	1		
Home Ora.	Make sure this is the correct faculty	1		
Factor	Not enterable			
Pavs	Not enterable			
Course Number	Enter four digit code followed by a	1		
	capitalized "U" (e.g. 1010LI)			
	1 oupstain 200 0 (0.9. 10100)			



Subject Code

Field/ Step	Field Entry	Page View	
Effective Date	Leave as default (same as query date)	Current	
COA	Leave as default	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
Fund	Defaults to type of position and faculty	New	
Organization	Defaults to type of position and faculty	Effective Date: MM/DD/YYYY 09/04/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Da	ite
Account	Defaults to type of position and faculty		
Program	Defaults to type of position and faculty.		
	NOTE: When doing mass uploads,		
	leave the Program code blank		
Activity	Leave as default unless BPO	100.00	
	recommends otherwise	Default from Index Save and Add New Rows	
Location	Leave as default		
Project	Leave as default		
Cost	Leave as default		
Percent	Leave as default		
Encumbrance	Leave as default		
Override End			
Date			
Default from	Do not select		
Index and Save			
and Add New			
Rows			

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Job END Information, 5TS9	999-01 Teaching Assistant
Job Status	Not enterable	Item Job Change Reason:	Current Value New Value
Pay Effective Date	Enter as contract end date of	Job Status: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enterable)) <u>T</u>
	semester as per Contract End Dates for academic year	Pay Effective Date: MM/DD/YYYY* Personnel Date: MM/DD/YYYY*	12/21/2018 12/21/2018



Personnel Date	Enter as contract end date of	
	semester as per Contract End	
	Dates for academic year	

Field/ Step	Field Entry				Page View		
Approval Level – Top Row	Your BPO should appear.	Routing Queue					
Required Action	Leave as default	Approval Level		User Name	Inclusion 10	Required Action	Remove
Approval Level – Second	Department Admin	25 - (25) Department Admin Approvers		Q HRADM43	Heather Lee Cooke	Approve	
Row	Approvers	90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UOIT HRMEP	Apply	
Required Action	Leave as default	Not Selected	•	d		Not Selected	•
Approval Level – Third	HRCATALOGUOIT	Not Selected Not Selected	•	۵ ۵		Not Selected Not Selected	•
Row							
Required Action	Leave as default]					
Save and Add New Rows	Do not select						

Research Assistant - New Hire (RA – New Hire, RANEMP)

Field Entry	Page View
Enter Banner ID or select the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
nagnifying glass icon to search by	* - indicates a required field.
name	ID: * 100729834 Jon Snow Q
Enter contract start date	Query Date: MM/DD/YYYY* 09/04/2018
Select RA – New Hire, RANEMP	Approval Category: * RA - New Hire, RANEMP
Go	Go
	All Jobs
Enter position number as indicated	
by EPAF Summary sheet	
Enter '00' as the suffix number	
eave as default	
	nter Banner ID or select the agnifying glass icon to search by ame nter contract start date elect RA – New Hire, RANEMP o nter position number as indicated y EPAF Summary sheet nter '00' as the suffix number eave as default



Click	Go	Enter or search for a new position number and enter the suffix, or select the link under Title.								
		ID: Jon Snow, 100729834 Query Date: Sep 04, 2018 Approval Category: RA - New Employee Hire. RANEMP								
		RA - New Hire, RANEE2 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select								
		New Job 5RG949 00 Research Assistant 2100, Faculty of ESNS Image: Control of the second secon								
		▲ There are no active jobs based on the Query Date.								
		All Jobs								
		Next Approval Type Go								

Field/ Step	Field Entry			Page View						
Job Change	Leave as default	RA - New Hire, 5RG949-00 Research Assistant								
Reason		There Coursest Mellor New Volue								
Sex	Select from dropdown	Job Change Reason: *(Not Enterable))	72						
SSN/SIN/TIN	Enter SIN	Sex: *	Male	Not Selected V						
Birth Date	Enter Birth Date	SSN/SIN/TIN: \star	123456789							
Citizenship	Select from dropdown. If Canadian citizen	Birth Date: MM/DD/YYYY*	12/23/1940							
•=•p	select '0'	Citizenship: *		Not Selected						
Current Hire	Leave as default	Pay Effective Date: MM/DD/YYYY*		09/04/2018						
Date		Personnel Date: MM/DD/YYYY*		09/04/2018						
Pay Effective	Leave as default	Job Begin Date: MM/DD/YYYY		09/04/2018						
Date		Total Contract Hrs: \star								
Parsonnal Data	Leave as default	Hours per Pay(2 wks):								
Ich Pogin Date		Hourly Rate: *								
JOD Degin Date	Leave as default	Employee Status:		P Active						
		Employee Class Code:								
		District Code: *(Not Enterable)		OIT						
		Home COAS: *(Not Enterable)		U						
		Home Organization: *(Not Enterable)		3700						
		Factor: (Not Enterable)		1						
		Pays: (Not Enterable)		1						
Total Contract	Enter the total contract hours									
Hours										
Hours per Pay	Leave as default									
(2 wks)										
Hourly Rate	Enter based on TA/RA rates for year]								



Contract Type	Select Primary												
Employee	Leave as default												
Status													
Employee	Leave as default												
Class Code													
District Code	Not enterable												
Home COAS	Not enterable												
Factor	Not enterable												
Pays	Not enterable												
Field/ Step	Field Entry						Page	View					
Effective Date	Leave as default (same as query date)	Current Effective Date: (09/04/2018										
COA	Leave as default	COA Index Fund	Organization	Account Progr	am Activity	Location Proje	ct Cost Percer	nt Encumbrar	ice Overrid	e End Date	2		
Fund	Defaults to type of position and faculty	New Effective Date: M		/04/2018									
Organization	Defaults to type of position and faculty	COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Over	ride End Date
Account	Defaults to type of position and faculty		Q	Q	Q	Q 10					100.00		
Program	Defaults to type of position and faculty.												
	NOTE: When doing mass uploads, leave		9	Q.		0							
	the Program code blank									Total:	100.00)	
Activity	Leave as default unless BPO recommends	×											
	otherwise	Default from Index	x Save and Ad	Id New Rows									
Location	Leave as default												
Project	Leave as default												
Cost	Leave as default												
Percent	Leave as default												
Encumbrance	Leave as default												
Override End													
Date													
Default from	Do not select												
Index and Save													
and Add New													
Rows													



Field/ Step	Field Entry	Page View							
Job Change	Leave as default	Enter Job END Information, 5RG949-00	Research Assistant						
Reason		Them: Current	t Value Now Value						
Job Status	Not enterable	Item Current	73 Contract Completion						
Job End Date	Not enterable	Job Status: (Not Enterable)	T						
Pay Effective	Enter contract end date	Job End Date: MM/DD/YYYY(Not Enterable)							
Date		Pay Effective Date: MM/DD/YYYY							
		Personnel Date: MM/DD/YYYY							
Personnel Date	Enter contract end date								

Field/ Step	Field Entry	Page View							
Approval Level –	Your faculty BPO will populate	Routing Queue					_		
Top Row		Approval Level	-	User Name		Required Action	Remove		
Required Action	Leave as default	25 - (25) Department Admin Approvers	•	C HRADM43	Heather Lee Cooke	Approve	•		
Approval Level –	Department Admin Approver	90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UOIT HRMEP	Apply			
	Department / talinin / tppiover	Not Selected	•	٩		Not Selected	•		
Second Row		Not Selected	•	a		Not Selected	•		
Required Action	Leave as default	Not Selected		Q		Not Selected	•		
Approval Level – Third Row	HRCATALOGUOIT	Not Selected		3	1	Not Selected	•		
Required Action	Leave as default	7							
Save and Add New	Do not select								
Rows									

Research Assistant - Hours Change (RA – Hours Change, RACJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying glass icon to search by name	
Query Date	Enter effective date to reflect when	
	the hours of the contract changed	
Approval Category	Select RA – Hours Change, RACEMP	



Click	Go	🔍 Enter a	n ID or sel	ect the link to	search	for an ID. Enter the	Query Date and select the	Approval Cate	gory. Select Go).			
Oller	66	* - indicates a required field.											
		ID: * 100729834 Jon Snow Q											
		0		D ()0000()									
		Query D	ate: MM/D	D/1111* 1	./28/20	018			1				
		Go	reategory	• •	a - Hou	irs change, RACJUB		•]				
		00											
Employee Job Assignments													
		Туре	Positio	n Suffix Tit	e	Time Sh	eet Organization Start	Date End	Date Last	Paid Date Stat	us		
		Seconda	5RG949 ry 5RG949	00 Res 01 Res	earch .	Assistant 3700, Ht Assistant 3700, Ht	iman Resources Jan 26	5, 2018 Feb 0	4, 2019	Activ	/e /e		
		All Jobs	1										
Position	Leave as default	💷 Enter	or search fe	or a new positi	on numl	ber and enter the suffi	ix, or select the link under Title	h.					
		ID:		Jon Snov	, 1007	29834							
Suffix	Leave as default	Query Appro	Date: val Catego	Nov 28, 1 rv: RA - Hou	018 s Char	nge, RACJOB							
Salaat	Salast position which requires on												
Select	Select position which requires an	RA - C	ng Job Dal	a, RACJB2	0.00	7141			End Data	Last Bald Bata		Coloret	
	hours change	Q	New Job	Position	Sumx	The	Time Sneet Organization	Start Date	End Date	Last Paid Dates	status	Select	
Click	Go					1						0	
Olick	00		Primary	5RG949	00	Research Assistant	3700, Human Resources	Aug 25, 2018	Feb 08, 2019		Active	•	
			Secondary	586949	01	Research Assistant	3700, Human Resources	lan 26, 2019	Oct 04, 2019		Active	\vdash	
			joccondur,	5110545				20, 2015				0	
		All Job	is i										
		Next /	Approval Typ	e Go									

Field/ Step	Field Entry	Page View									
Job Change Reason	Select hours change reason 111	RA - Chg Job Data, 5RG949	A - Chg Job Data, 5RG949-00 Research Assistant								
		Item	Current Value	New Value							
Pay Effective Date	Leave as default	Job Change Reason: ∗	72	Not Selected							
Personnel Date	Leave as default	Pay Effective Date: MM/DD/YYYY	08/25/2018	11/28/2018							
r oroonnor Dato		Personnel Date: MM/DD/YYYY	09/04/2018	11/28/2018							
		Total Contract Hrs:	190								
		Hours per Pay(2 wks):	15.83								
		Hourly Rate:	40								
		Contract Type:	Primary	Not selected V							
		Job Status:	Active	Active 🗸							
		Home COAS: (Not Enterable)	U	U							
		Home Organization: (Not Enterable	e) 3700, Human Resource	5 3700							
		Step:	0	0							
		Factor:	12	1							
		Pays:	12	1							
Total Contract	Enter the revised total hours. For										
	average if the original hour ware										
Hours	example, il the original nour were										


	150 and you need to add 14 more
	hours to the contract, enter 164
	hrs.
Hours per Pay (2	Leave as default (automatically
wks)	calculates)
Hourly Rate	Enter based on TA/RA rates for
	year
Contract Type	Select Secondary
Job Status	Leave as default
Home COAS	Leave as default
Home	Enter or click on magnifying glass
Organization	icon and select the correct home
-	organization code for faculty/dept.
Factor	Not enterable
Pays	Not enterable

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query date)	Current Effective Date: 08/25/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
COA	Leave as default	0 100000 2100 62121 10 100.00
Fund	Defaults to type of position and faculty	New Effective Date: MM/DD/YYYY 11/28/2018
Organization	Defaults to type of position and	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
organization	faculty	
Account	Defaults to type of position and	
	faculty	
Program	Defaults to type of position and	Total: 100.00
	faculty. NOTE: When doing mass	Solution of the second
	uploads, leave the Program code	Default from Index Save and Add New Rows
	blank	
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	



Percent	Leave as default
Encumbrance	Leave as default
Override End	
Date	
Default from	Do not select
Index and Save	
and Add New	
Rows	

Field/ Step	Field Entry	Page View					
Effective Date	Enter as query date	Current Effective Date Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date					
Earnings	Leave as default	08/25/2018 RTA, Research, Teaching Assistants 1 15.83					
Hours or Units Per Pay	Leave as default	New Value Effective Date MM/DD/YYYY Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date MM/DD/YYYY Remove					
Deemed Hours	Leave as default						
Special Rate	Leave as default	Not Selected V					
Shift	Leave as default	Not Selected					
End Date	Leave as default	Not Selected					
Save and Add New Rows	Do not select	Not Selected Not Selected Save and Add New Rows					

Field/ Step	Field Entry			Page View	
Job Change Reason	Leave as default				
Job Status	Not enterable	Enter Job END Information, 5RG9	49-00 Resea	ırch Assistant	
Job End Date	Not enterable	Thom		Now Value	
Pay Effective Date	Enter as job end date of semester as per Contract End Dates for academic year	Job Change Reason: Job Status: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enterable) Pay Effective Date: MM/DD/YYYY	72 Active 02/08/2019 08/25/2018	73, Contract Completion T 02/08/2019	
Personnel Date	Enter as contract end date of semester as per contract end dates for academic year	Personnel Date: MM/DD/YYYY	09/04/2018	02/01/2019	



Field/ Step	Field Entry				Page View		
Approval Level –	The faculty BPO should appear	Routing Queue					
Top Row		Approval Level		User Name		Required Action	Remove
Required Action	Loove og default	20 - (BPO) Departmental BPO's	•	Q USCBPO	to the second	Approve	•
Required Action	Leave as delault	25 - (25) Department Admin Approvers		HRADM43	Heather Lee Cooke	Approve	
Approval Level –	The Department Admin Approver	90 - (HR-APP) HR Apply		HRCATALOGUOIT	UOIT HRMEP	Apply	
	The Department Admin Approver	Not Selected	•	a		Not Selected	•
Second Row		Not Selected	•	a		Not Selected	•
Deguined Action		Not Selected	٠	۹		Not Selected	•
Required Action	Leave as default	Not Selected	•	Q		Not Selected	
Approval Level – Third Row	HRCATALOGUOIT						
Required Action	Leave as default						
Save and Add New	Do not select						
Rows							

Research Assistant – Change Job (RA – Job Info Change, RANJOB)

Field/ Step	Field Entry	Page View				
ID	Enter Banner ID or the magnifying	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.				
	glass icon to search by name					
Query Date	Enter effective date of the change as	107 * 100/29534 Jon Show				
	the query date	Query Date: MM/DD/YYYY* 11/28/2018 Approval Category: * RA - Job Info Change, RANJOB				
Approval	Select RA – Job Info Change, RANJOB	Go				
Category		Employee Job Assignments				
Click	Go	Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 58/6949 0.0 Research Assistant 3700 Human Resources Aug 25, 2018 Feb 08, 2019 Active				
		Secondary SRG949 01 Research Assistant 3700, Human Resources Jan 26, 2019 Oct 04, 2019 Active				
Position	Leave as default	The 2005 Finite or search for a new position number and enter the suffix, or select the link under Title.				
Suffix	Leave as default	ID: Jon Skow, 100729834 Query Date: Nov 28, 7018 Annexed Careers RA 1016 Annex				
Calact	The entropyiste position to change					
Select	The appropriate position to change	Nor - Cirg Job Disto, FACURE Search Type Position Suffic Title Time Sheet OrganizationStart Date End Date Last Pald DateStatus/Select				
Click	Go	Prmary SRG949 C0 Research Assistant[3700, Human Resources Aug 25, 2018] eb 08, 2019 Active				
Olick	66	Secondary (SRG949 01 Research Assistant 3700). Human Resources Dan 26, 2019 Oct 04, 2019 Active				
		AI JODA				
		Next Approval Type Go				



Field/ Step	Field Entry	Page View				
Job Change	Select change reason from the	RA - Chg Job Data, 5RG949-00 Research Assistant				
Reason Devi Effective	Grouped with	Item	Current Value	New Value		
Pay Effective	Enter data from Current value column	Job Change Reason: *	72	Not Selected		
Date		Pay Ellective Date: MM/DD/TTTT	08/23/2018	11/28/2018		
Personnel Date	Enter data from Current Value column	Total Contract Hrs:	190			
Total Contract	Enter data from Current Value column	Hours per Pay(2 wks):	15.83			
Hrs.		Hourly Rate:	40			
Hours per Pay	Leave as default	Contract Type:	Primary	Not selected V		
(2 wks.)		Job Status:	Active	Active		
Hourly Rate	Enter as per TA/RA rates for given	Home COAS: (Not Enterable)	U			
5	semester and vear	Step: (Not Enterable)) 3700, Human Resources	3700		
Contract Type	Enter data from current value column	Factor: (Not Enterable)	12			
Job Status	Leave as default	Pays: (Not Enterable)	12			
Home COAS	Not enterable					
Home Org	This should be the home org. for the					
	position					
Step:	Not enterable					
Factor	Not enterable					
Pays	Not enterable					

Field/ Step	Field Entry	Page View												
Effective Date	Leave as default (Query Date)	Curren	Current											
COA	Leave as default	COA I	ndex Fund	Organizatio	on Account Prog	ram Activity	y Location Proj	ect Cost Perc	ent Encumbr	ance Overri	de End Da	ate		
Fund	Defaults to type of position and faculty	U	10000	00 2100	62121 10			100	0.00					
Organization	Defaults to type of position and faculty	New												
Account	Defaults to type of position and faculty	Effectiv	ve Date: MN	1/DD/YYYY 11	/28/2018									
Program	Defaults to type of position and faculty.	COA Q U	Index	Fund Q 100000	Organization	Account	Program Q 10	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Overr	ide End Date
J J	NOTE: When doing mass uploads,	0				Q								
	leave the Program code blank	ď												
Activity	Leave as default unless BPO	۹ 🗌			Q.	٩		٩						
	recommends otherwise										Total:	100.00)	
Location	Leave as default	🕑 Defa	aulting valu	es for Labor Di	stribution from t	ne Job record	s.							
Project	Leave as default	Defau	lt from Index	Save and A	dd New Rows									
Cost	Leave as default													



Percent	Leave as default
Encumbrance	Leave as default
Override End	
Date	
Default from	Do not select
Index and Save	
and Add New	
Rows	

Field/ Step	Field Entry	Page View				
Effective Date	Enter query date	Current Effective Date Earnings Hours or Units Per Pay Deemed Hours Special Rate Shift End Date				
Earnings	Leave as default	08/25/2018 RTA, Research, Teaching Assistants 1 15.83				
Hours or Units Per Pay	Leave as default	New Value Figure 1/28/2018 Hours or Units Per Pay Deemed Hours Special Rate Shift End Date MM/DD/YYYY Remove 11/28/2018 RTA, Research, Teaching Assistants V 15.83 1				
Deemed Hours	Leave as default	Not Selected				
Special Rate	Leave as default	Not Selected				
Shift	Leave as default					
End Date	Leave as default	Not Selected				
Save and Add	Do not select	Not Selected				
New Rows		✓ Defaulting values for Default Earnings from the Job records. Save and Add New Rows				

Field/ Step	Field Entry	Page View					
Job Change	Leave as default unless EPAF change						
Reason	requires otherwise	Enter Job END Information, 5RG9	49-00 Resea	rch Assistant			
Job Status	Not enterable	Item	Current Value	New Value			
Job End Date	Not enterable	Job Change Reason:	72	73, Contract Completion			
Pay Effective	Enter as contract job end date from	Job Status: (Not Enterable)	Active	Т			
Date	current value column	Job End Date: MM/DD/YYYY(Not Enterable)	02/08/2019				
Personnel Date	Enter as contract end date of semester	Pay Effective Date: MM/DD/YYYY	08/25/2018	02/08/2019			
r croonner Date	as per Contract End Dates for	Personnel Date: MM/DD/YYYY*	09/04/2018	01/31/2019			
	academic year						



Field/ Step	Field Entry				Page View		
Approval Level – Top	The faculty BPO will populate	Routing Queue					
Row		Approval Level		User Name	In the second se	Required Actio	Remove
Required Action	Leave as default	25 - (25) Department Admin Approve	ers	RADM43	Heather Lee Cooke	Approve	
Approval Level – Second	The Department Admin	90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UOIT HRMEP	Apply	
		Not Selected		4		Not Selected	•
ROW	Approver	Not Selected	-	50		Not Selected	
Required Action	Leave as default	Not Selected	÷	d		Not Selected	•
Approval Level – Third	HRCATALOGUOIT						
Row							
Required Action	Leave as default						
Save and Add New Rows	Do not select						

Research Assistant - Terminate Job (RA – Terminate Job, RATERM)

Field/Step	Field Entry	Page View												
ID	Enter Banner ID or the	🔍 Ent	ter an ID or dicates a r	select the line	ink to search f eld.	or an ID. I	Enter the Query Date and s	elect the Approval Category. Select G	io.					
	hy name	ID: 🛊	10072983	4 30	on Snow]۹							
Query Date	Enter the new end date of the change	Quer Appre Go	y Date: MM oval Categ]	4/DD/YYYY ory: *	Y 11/28/201	8 nate Job,	RATERM	V						
Approval Category	Select RA – Terminate Job, RATERM	Empl Type Prima Secor	oyce Job Posi iry SRG ndary SRG	Assignme ition Suffix 949 00 949 01	ents x Title Research As Research As	T sistant 3 sistant 3	ime Sheet Organizatio 700, Human Resources 700, Human Resources	Start Date End Date Las Aug 25, 2018 Feb 08, 2019 Jan 26, 2019 Oct 04, 2019	t Paid Date Stat Activ Activ	us re e				
Click	Go	All Jobs												
Position	Leave as default	T P E	nter or se	earch for a	a new positi	on numl	per and enter the suffi	x, or select the link under Title						
Suffix	Leave as default	ID: Qu Apj	ery Date proval C	e: Category	Jon Snov Nov 28, 3 RA - Terr	r, 1007 2018 ninate	29834 Job, RATERM							
Select	Select the appropriate position	Ent	er Job E	nd Date	e for Pay L	ffectiv	e Date, GETRM							
	to be terminated	Sea	arch Typ	e Po	osition	Suffix	Title	Time Sheet Organizatior	Start Date	End Date	Last Paid Date	Status	Select	
Click	Go	~	INEW	100									0	
			Prin	nary 5F	RG949	00	Research Assistant	3700, Human Resources	Aug 25, 2018	Feb 08, 2019		Active	۲	
			Sec	ondary 5F	RG949	01	Research Assistant	3700, Human Resources	Jan 26, 2019	Oct 04, 2019		Active	0	
		Al	l Jobs ext Appro	val Type	Go									



Field/ Step	Field Entry			Page View
Job Change Reason	Leave as default	Enter Job End Date for Pay E	fective Date,	5RG949-00 Research Assistant
Job End Date	Enter data from current value	Item	Current V	alue New Value
	column	Job Change Reason: (Not Enterable)	72	ETOD
Pay Effective Date	Enter the Job End Date from the	Job End Date: MM/DD/YYYY(Not Ente	rable) 02/08/201	9
	current value column	Job Status: (Not Enterable)	08/25/201 Active	8 02/08/2019
Annual Salary	Leave as default	Annual Salary:	7598.4	
Job Change Reason	Indicate the change reason by selecting the appropriate	Enter New Contract End Date	, 5RG949-00	Research Assistant
	dropdown	Item	Current Value	New Value
Pay Effective Date	Enter as query date	Job Change Reason: *(Not Enterable)	72	ETND
Personnel Date	Enter as query date	Pay Enective Date: MM/DD/YYYY	09/04/2018	11/28/2018 11/28/2018
Job Status	Not enterable	Job Status: * (Not Enterable)	Active	
Annual Salary	Leave as default	Annual Salary:	7598.4	

Research Assistant - Rehire - (RA – Rehire, RAXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search	* - indicates a required field.
	by name	ID: * 100729834 Jon Snow Q
Query Date	Enter contract start date	
Approval Category	Select RA – Rehire, RAXEMP	Approval Category: * RA - Rehire RAXEMP
Click	Go	
		Employee Job Assignments
		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 5RG949 0.0 Research Assistant 3700 Human Resources Aug 25 2018 Eeb 08 2019 Active
		All Jobs
Position	Enter position number as	
	indicated by EPAF Summary	
	sheet	
Suffix	Enter the next suffix number for	
	this employee. Duplicate suffix's	
	will cause errors in the system.	



Select	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Jon Snow, 100729834	
Click	Go	Query Date: Feb 01, 2019 Approval Category: RA - Rehire, RAXEMP RA - Rehire, RAXEE2	
		Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date/Status/Select	
		New Joil 5RG949 01 Research Assistant 2100, Faculty of ESNS Image: Comparison of the second s	
		Primary 5RG949 00 Research Assistant 3700, Human Resources Aug 25, 2018 Feb 08, 2019 Active	
		All Jobs Next Approval Type Go	

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	Item Current Value New Value
Current Hire Date	Leave as default	Job Change Reason: * 72, Contract Position
Day Effective Date		Current Hire Date: 09/04/2018 02/01/2019
		Pay Effective Date: 02/01/2019
Personnel Date	Leave as default	MM/DD/YYYY*
Job Begin Date	Leave as default	Job Begin Date: MM/DD/YYYY 02/01/2019
		Hourly Rate:
		Hours per Pay(2 wks):
		Contract Type: Secondary V
		Employee Status: Active Active V
		Employee Class Code: * 5U, Teaching/Research Assistants
		Home COAS: U Q
		Home Organization: 3700, Human Resources Q 3700
		Step:
		Factor: (Not Enterable)
		Pays: (Not Enterable)
Total Contract Hrs	Enter total hours as indicated on	
	hiring Page View	
Hourly Rate	Enter based on TA/RA rates for	
	year	
Hours per Pay (2 wks)	Leave as default (automatically	
	calculates)	
Contract Type	Select Secondary	
Employee Status	Leave as default	
Employee Class Code	Enter as 5U	



District Code	Not enterable
Home COAS	Not enterable
Factor	Not enterable
Pays	Not enterable

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (query date)	Current
COA	Leave as default	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
Fund	Defaults to type of position and	New
	faculty	Effective Date: MM/DD/YYYY 02/01/2019 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End
Organization	Defaults to type of position and	
	faculty	
Account	Defaults to type of position and	
	faculty	
Program	Defaults to type of position and	100.00
	faculty. NOTE: When doing mass	Default from Index Save and Add New Rows
	uploads, leave the Program code	
	blank	
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance Override	Leave as default	
End Date		
Default from Index and	Do not select	
Save and Add New		
Rows		

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Job Status	Not enterable	
Job End Date	Not enterable	



Pay Effective Date	Enter as contract end date	Enter Job END Information, 5RG949-01 Research Assistant				
		Item	Current Value New Value			
Personnel Date	Enter as contract end date	Job Change Reason: Job Status: (Not Enterable) Job End Date: MM/DD/YYYY(Not Pay Effective Date: MM/DD/YYYY Personnel Date: MM/DD/YYYY	T Y *			

Field/ Step	Field Entry				Page View		
Approval Level – Top	The BPO for the faculty	Routing Queue					
Row		Approval Level		User Name		Required Actio	n Rem
Dequined Action		20 - (BPO) Departmental BPO's	•	Q USCBPO		Approve	• 0
Required Action	Leave as default	25 - (25) Department Admin Approver	s	HRADM43	Heather Lee Cooke	Approve	
Approval Level – Second	Department Admin Approver	90 - (HR-APP) HR Apply		HRCATALOGUOIT	UOIT HRMEP	Apply	
	Doparationa valuar approvol	Not Selected		0		Not Selected	
ROW		Not Selected	-	0		Not Selected	
Required Action	Leave as default	Not Selected		0		Not Selected	
Approval Level – Third	(HR-APP) HR Apply						
Row	(HRCATÁLOGUOIŤ)						
Required Action	Leave as default						
Save and Add New	Do not select						
Rows							

Sessional Lecturer - New Hire (SS – New Hire, SSNEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to	* - indicates a required field.
	search by name	ID: * 100729826 James Barnes Q
Query Date	Enter contract start date. This	Query Date: MM/DD/YYYY* 09/04/2018
	is always the begin date of	Approval Category: * SS - New Hire, SSNEMP
	the Semester.	Go
Approval Category	Select SS – New Hire,	⚠ There are no active jobs based on the Query Date.
	SSNEMP	All Jobs



Click	Go	
Position	Enter position number as indicated by EPAF Summary sheet	ID:James Barnes, 100729826Query Date:Sep 04, 2018Approval Category:Sessionals - New Hire, SSNEMP
Suffix	Enter '00' as the suffix number	Sessionals - New Hire, SSNEP2 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Q New Job 401999 00 Sessional Lecturer *FBIT 2200, Faculty of Business and IT Image: Colspan="5">Colspan="5">Colspan="5">Colspan=5
Select	Leave as default	▲ There are no active jobs based on the Query Date.
Click	Go	All Jobs Next Approval Type Go

Field/ Step	Field Entry	Page View					
Job Change Reason	Leave as default	Item	Current Value	lew Value			
Sex	Select from dropdown	Job Change Reason: \star		72, Contract Position 🗸			
SSN/SIN/TIN	Enter SIN	Sex: *	Female	Not Selected V			
Birth Date	Enter Birth Date	SSN/SIN/TIN: *					
Citizenship	Select from dropdown	Birth Date: MM/DD/YYYY*	Oct 03, 2002				
Current Hire Date	Leave as default	Citizenship: \star	0, Canadian	Not Selected V			
Pay Effective Date	Leave as default	Current Hire Date: MM/DD/YYYY*		03/11/2021			
Personnel Date	Leave as default	Pay Effective Date: MM/DD/YYYY	¢	03/11/2021			
Job Begin Date	Leave as default	Personnel Date: MM/DD/YYYY*		03/11/2021			
Title	Sessional Lecturer or	Job Begin Date: MM/DD/YYYY*		03/11/2021			
	Sessional Lecturer – Co-	Title(30 characters): *					
	teach	Annual Salary: *					
Annual Salary	Collective Agreement, Note:	Contract Type:		Primary V			
	if Co-teaching, pro-rate	Number of sections: *					
	based on % of section (ex5	Employee Status:	0	Active			
	section = 50% salary)	District Code: (Not Enterable)					
Contract Type	Select Primary	Home COAS: *(Not Enterable)					
Number of Sections	Enter as indicated i.e. 1 or		0				
	0.5, 0.33 for Co-teaching						
Employee Status	Leave as default	Pactor: (Not Enterable)					
Employee Class Code	Leave as default	Course Number					
District Code	Not enterable	Subject Code:					
Home COAS	Not enterable						



Home Organization	Enter or click on magnifying
	glass icon and select the
	correct home organization
	code for faculty/dept.
Factor	Not enterable
Pays	Not enterable
Course Number	Enter four digit code followed
	by a capitalized "U" (e.g.
	1010U)
Subject Code	Enter the four capital letter
	code (e.g. BUSI)

Field/ Step	Field Entry		Pa	age View			
Effective Date	Leave as default (Query Date)	urrent ffective Date: 09/04/2018 OA Index Fund Organization Account Program Act	tivity Location Project	Cost Percent Encumbra	ance Override En	d Date	
COA	Leave as default	ew					
Fund	Defaults to type of position	ffective Date: MM/DD/YYYY <u>09/04/2018</u> OA Index Fund Organization Accou	unt Program	Activity Location	Project	ost Perce	nt Encumbrance Override End Date
	and faculty		2000 Q 10			10	0.00
Organization	Defaults to type of position		Q				
_	and faculty		Q	۹			
Account	Defaults to type of position		Q	Q		otal:	
	and faculty					10	0.00
Program	Defaults to type of position	Default from Index					
	and faculty. NOTE: When	Save and Add New Kows					
	doing mass uploads, leave						
	the Program code blank						
Activity	Leave as default unless BPO						
	recommends otherwise						
Location	Leave as default						
Project	Leave as default						
Cost	Leave as default						
Percent	Leave as default						
Encumbrance Override	Leave as default						
End Date							



efault from Index and	Do not select
Save and Add New Rows	

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Job END Information, 4UI999-	00 Sessional Lecturer *FBIT
Job Status	Not enterable	Item Cur	rrent Value New Value
Job End Date	Not enterable	Job Change Reason:	73, Contract Completion
Pay Effective Date	Enter as contract end date of semester as per Contract End Dates for academic year	Job Status: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enterable) Pay Effective Date: MM/DD/YYYY * Personnel Date: MM/DD/YYYY *	T 12/21/2018 12/21/2018
Personnel Date	Enter as contract end date of semester as per Contract End Dates for academic year		

Field/ Step	Field Entry				Page View		
Approval Level – Top	Faculty BPO	Routing Queue					_
Row		Approval Level		User Name		Required Action	Remove
Required Action	Leave as default	20 - (BPO) Departmental BPO's 25 - (25) Department Admin Approvers	_	USCBPO USCBPO HRADM43	Heather Lee Cooke	Approve	• •
Approval Level - Second	Eaculty Department Admin	90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UOIT HRMEP	Apply	
Approval Level – Second	r acuity Department Aumin	Not Selected	•	۹		Not Selected	Ŧ
Row	Approver	Not Selected	۲	٩		Not Selected	•
Pequired Action	Loovo as dofault	Not Selected	٠	٩		Not Selected	٠
Required Action		Not Selected		d,		Not Selected	
Approval Level – Third	(HR-APP) HR Apply						
Row							
Required Action	Leave as default						
Save and Add New Rows	Do not select						
		_					



Sessional Lecturer – Job Info Change (SS – Job Info Change, SSCJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying	ID: ★ 100729826 James Barnes Q
	glass icon to search by name	Query Date: MM/DD/YYYY* 11/26/2018
Query Date	Enter effective date of the change	Approval Category: * SS - Job Info Change, SSCJOB
Approval Category	Select SS – Job Info Change,	
	SSCJOB	Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status
Click	Go	Primary 4U1999 00 Sessional Lecturer *FBIT 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active Secondary 01 Sessional Lecturer *FBIT 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
		All Jobs
Position	Leave as default	ID: James Barnes, 100729826 Query Date: Nov 26, 2018
		Approval Category: Sessionals - Job Info Change, SSCJOB
Suffix	Leave as default	Sessionals - Chg Job Data, SSCJB2 SearchType Position Suffix Title Time Sheet Organization/Start Date End Date Last Paid Date/Status/Select
		Q. New Job
Select	Select the appropriate position to	Primary 4UI999 00 Sessional Lecturer *FBIT 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
	change	Secondary 4UI999 01 Sessional Lecturer *FBIT 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active
Click	Go	All Jobs
		Next Approval Type Go

Field/ Step	Field Entry			Page View
Job Change	Select the change reason from			
Reason	the dropdown	Sessionals - Chg Job Data	, 4UI999-01 s	Sessional Lecturer *FBIT
Pay Effective Date	Enter data from current value		o	New Velue
	column	Item	Current Value	127 Change in Contract Calary
Personnel Date	Enter data from current value	Pay Effective Date: MM/DD/YYYY	08/25/2018	
	column	Personnel Date: MM/DD/YYYY	09/04/2018	09/04/2018
Annual Salary	Enter as indicated Collective	Annual Salary:	7454	7900
	Agreement as per EPAF	Contract Type:	Secondary	Secondary V
	change	Number of sections:	1	1
Contract Type	Select Secondary	Factor: (Not Enterable)	9	
Number of	Enter if needed as per EPAF	Pays: (Not Enterable)	9	
Sections	change	Course Number:		1010U
Factor	Not enterable	Subject Code:		BUSI



Pays	Not enterable
Course Number	Enter (if needed) the four digit
	code followed by a capitalized
	"U" (e.g. 1010U) as per EPAF
	change
Subject Code	Enter the four capital letter
	code (E.g. BUSI)

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (Query Date)	Current
COA	Leave as default	Effective Date: 08/25/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
Fund	Defaults to type of position and faculty	U 100000 2200 62000 10 100.00
Organization	Defaults to type of position and faculty	Nou
Account	Defaults to type of position and faculty	Effective Date: MM/DD/YYYY 11/26/2018
Program	Defaults to type of position and faculty.	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
	NOTE: When doing mass uploads,	
	leave the Program code blank	
Activity	Leave as default unless BPO	
	recommends otherwise	Total: 100.00
Location	Leave as default	Solutions of the second
Project	Leave as default	Default from Index Save and Add New Rows
Cost	Leave as default	
Percent	Leave as default	
Encumbrance	Leave as default	
Override End		
Date		
Default from	Do not select	
Index and Save		
and Add New		
Rows		

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default unless EPAF change requires otherwise	



Job Status	Not enterable	Enter Job END Inform	nation, 4U	1999-01 Sessio	onal Lecturer *FBIT		
Job End Date	Not enterable	**		o	New Yelve		
Pav Effective Date	Enter as contract job end date	Item		Current value			
,	from current value column	Job Change Reason:		72	73, Contract Completion	~	
		Job Status: (Not Enterable		Active	Т		
Personnel Date	Enter as contract end date of	Job End Date: MM/DD/YYY	(Not Enterat	ole) 12/28/2018			
	semester as per contract end	Pay Effective Date: MM/DD	/YYYY <mark>*</mark>	08/25/2018	12/28/2018		
	date for the academic year	Personnel Date: MM/DD/Y	YY <mark>*</mark>	09/04/2018	12/21/2018		
Field/ Step	Field Entry			Р	age View		
Approval Level – Top	Faculty BPO	Routing Queue					
Row		Approval Level	User Nam	ne		Required Action	Remove
Required Action	Leave as default	20 - (BPO) Departmental BPO's	USCBP	0		Approve	• •
		25 - (25) Department Admin Approvers 90 - (HR-APP) HR Apply			Heather Lee Cooke	Approve	
Approval Level – Second	Department Admin Approver	Not Selected	• Q		OUT HIMLE	Not Selected	•
Row		Not Selected	• ٩			Not Selected	•
Required Action	Leave as default	Not Selected	• •			Not Selected	•
Required Action		Not Selected	• 4			Not Selected	•
Approval Level – Third	(HR-APP) HR Apply						
Row	(
Required Action	Leave as default						
Save and Add New Rows	Do not select						

Sessional Lecturer - Terminate Job (SS – Terminate Job, SSTERM)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass icon to search by name	* - indicates a required field.
Query Date	Enter effective date of the change	ID: * 100729832 Angela Rhonda Anaconda
	in	Query Date: MM/DD/YYYY¥ 11/28/2018 Approval Category: * TA - Terminate Job, TATERM
Approval Category	Select SS – Terminate Job,	Go
	SSTERM	Employee Job Assignments
Click	Go	Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 5TS599 00 Teaching Assistant 3700, Human Resources Aug 25, 2018 Active Secondary STS999 01 Teaching Assistant 3700, Human Resources Aug 25, 2018 Active
		All Jobs



Position	Leave as default	Enter	or search f	or a new posit Angela F	ion numb	per and enter the suff Anaconda, 1007298	ix, or select the link under Titl	e.			
Suffix	Leave as default	Query Date: Nov 28, 2018 Approval Category: TA - Terminate Job (Stop Pay), TATERM									
Select	Select the appropriate position to	Search	Type	Position	Suffix	Title	Time Sheet Organizatio	Start Date	End Date	Last Paid Date Status	Select
Select	be terminated	Q,	New Job								0
Click	Go		Primary	5TS999	00	Teaching Assistant	3700, Human Resources	Aug 25, 2018	Dec 28, 2018	8 Active	۲
			Secondar	(STS999	01	Teaching Assistant	3700, Human Resources	Aug 25, 2018	Dec 28, 2018	8 Active	0
		All Job Next A	os Approval Typ	e Go							

Field/ Step	Field Entry	Page View					
Job Change Reason	Leave as default	Enter Job End Date for Pay Effective Date, 4UI999-00 Sessional Lecturer *FBIT					
Job End Date	Enter data from current value column	Item Job Change Reason: (Not Enterable	Current Value	New Value			
Pay Effective Date	Enter as Job End Date for current value column	Job End Date: MM/DD/YYYY Pay Effective Date: MM/DD/YYYY *	12/28/2018 08/25/2018	12/28/2018 12/28/2018			
Annual Salary	Leave as default	Job Status: (Not Enterable) Annual Salary:	Active 7454				
Pay Effective Date	Enter as query date	Enter New Contract End Dat	e, 4UI999-00	0 Sessional Lecturer *FBIT			
Personnel Date	Enter as query date	Item	Current Valu	e New Value			
Job Status	Not enterable	Job Change Reason: *(Not Enterabl	e) 72	ETND			
Annual Salary	Leave as default	Pay Effective Date: MM/DD/YYYY* Personnel Date: MM/DD/YYYY*	08/25/2018 09/04/2018	11/26/2018 11/26/2018			
		Job Status: * (Not Enterable) Annual Salary:	Active 7454				

Field/ Step	Field Entry	Page View
Approval Level – Top	Click on magnifying glass icon	
Row	and select the correct faculty	
	BPO from the dropdown	
Required Action	Leave as default	
Approval Level –	Select HRCATALOGUOIT	
Second Row		



Required Action	Leave as default	Routing Queue						
		Approval Level	User Name		Required Actio	on		
		20 - (BPO) Departmental BPO's	RADM6	Fun Bobby	Approve			
		90 - (HR-APP) HR Apply	A HRCATALOGUOIT ×	UOIT HRMEP	Apply			
Save and Add New	Do not select	Not Selected 🗸	Q,		Not Selected	~		
Davie and Add New		Not Selected	٩,		Not Selected	~		
Rows		Not Selected	٩,		Not Selected	~		
		Not Selected 🗸	Q		Not Selected	~		
		Save and Add New Rows						

Sessional Lecturer - Rehire (SS – Rehire, SSXEMP)

Field/ Step	Field Entry	Page View							
ID	Enter Banner ID or the magnifying	ID: * 100729826 James Barnes Q							
	glass icon to search by name	Query Date: MM/DD/YYYY* 09/04/2018							
Query Date	Enter contract start date. This is	Approval Category: * SS - Rehire, SSXEMP							
	always the Begin Date of the semester	Go							
Approval	Select SS – Rehire, SSXEMP	Employee Job Assignments							
Category		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 4U1999 00 Sessional Lecturer *FBITI3700. Human Resources Aug 25, 2018 Active							
Click	Go	All Jobs							
Position	Enter position number as indicated by	ID: James Barnes, 100729826							
	EPAF Summary sheet	Approval Category: Sessionals - Rehire, SSXEMP							
Suffix	Enter the next suffix number for this	Sessionals - Rehire, SSXEP2							
	position	SearchType Position Suffix Title Time Sheet Organization Start Date End Date Last Paid DateStatusSelect							
Select	Leave as default	New Job 401999 01 Sessional Lecturer *FBI1 2200, Faculty of Business and I1 O							
		Primary 4UI999 00 Sessional Lecturer *FBIT 3700, Human Resources Aug 25, 2018 Dec 28, 2018 Active							
Click	Go	All Jobs							
		Next Approval Type Go							

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Current Hire Date	Leave as default	
Pay Effective	Leave as default	
Date		
Personnel Date	Leave as default	



Job Begin Date	Leave as default	Item	Current Value	New Value
Title	Sessional Lecturer or Sessional	Job Change Reason: *		72, Contract Position
	Lecturer – Co-teach	Sex: *	Female	Not Selected V
Annual Salarv	Collective Agreement, Note: if Co-	SSN/SIN/TIN: *		
,, ,	teaching, pro-rate based on % of	Birth Date: MM/DD/YYYY*	Oct 03, 2002	
	section (ex. 5 section = 50% salary)	Citizenship: *	0, Canadian	Not Selected V
Contract Type	Select Secondary	Pay Effective Date: MM/DD/YYYY	*	03/11/2021
Number of	Enter as indicated i.e. 1 or 0.5, 0.22	Personnel Date: MM/DD/YYYY*		03/11/2021
Sections	for Co topohing	Job Begin Date: MM/DD/YYYY*		03/11/2021
		Title(30 characters): *		
Employee Status	Leave as default	Annual Salary: *		
Employee Class	Leave as default	Contract Type:		Primary V
Code		Number of sections: *		
District Code	Not enterable	Employee Status:		Active v
Home COAS	Not enterable	Employee Class Code:		
Factor	Not enterable	District Code: (Not Enterable)		
Pavs	Not enterable	Home Organization: *		
Course Number	Enter four digit code followed by a	Factor: (Not Enterable)		
	capitalized "II" (o.g. 1010II)	Pays: (Not Enterable)		
Quilt is at Qarda	Enter the four conital letter code (E.g.	Course Number:		
Subject Code	BUSI)	Subject Code:		

Field/ Step	Field Entry	Page View											
Effective Date	Leave as default (query date)	Curre	Current								_		
COA	Leave as default	COA I	ndex Fund	Organization	Account Progra	m Activity I	Location Proje	ct Cost Percei	nt Encumbrar	ice Override	e End Date	2	
Fund	Defaults to type of position and faculty	New Effecti	ve Date: MM	I/DD/YYYY 09/	04/2018								
Organization	Defaults to type of position and faculty		Index	Fund Q 100000 Q	Organization	Account	Program Q 10 Q	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Override End Date
Account	Defaults to type of position and faculty	d		Q		م م							
Program	Defaults to type of position and faculty. NOTE: When doing mass uploads, leave the Program code blank	✔ Defat	ilt from Index	Save and Ad	d New Rows						Total:	100.00	



Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance	Leave as default	
Override End Date		
Default from Index	Do not select	
and Save and Add		
New Rows		

Field/ Step	Field Entry	Page View						
Job Change Reason	Leave as default	Enter Job END Information 41/1999-01 Sessional Lecturer *EBIT						
Job Status	Not enterable							
Job End Date	Not enterable	Item	Current Value New Value					
Pay Effective Date	Enter as contract end date of	Job Change Reason:	73, Contract Completion					
	semester as per Contract End	Job Status: (Not Enterable)	Т					
	Dates for academic year	Job End Date: MM/DD/YYYY(Not Enterable)					
Personnel Date	Enter as contract end date of	Pay Effective Date: MM/DD/YYYY	12/21/2018					
	semester as per Contract End	Personnel Date: MM/DD/YYYY	12/21/2018					
	Dates for academic year							

Field/ Step	Field Entry				Page View		
Approval Level – Top	The faculty BPO	Routing Queue					
Row		Approval Level	-	User Name		Required Action	Remove
Required Action	Leave as default	20 - (BPO) Departmental BPO's 25 - (25) Department Admin Approver	5	Q HRADM43	Heather Lee Cooke	Approve	•]0
Approval Level - Second	The Department Admin	90 - (HR-APP) HR Apply		Q HRCATALOGUOIT	UOIT HRMEP	Apply	
		Not Selected	۲	٩		Not Selected	•
Row	Approvers	Not Selected	•	a		Not Selected	•
Required Action	Leave as default	Not Selected	•	Q .		Not Selected	•
Required Action		Not Selected	1000	4		Not Selected	
Approval Level – Third	(HR-APP) HR Apply						
Row	(
1.00							
Required Action	Leave as default						



Save and Add New Rows D	o not select
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NU L9 & Below (S) - New Hire, ATNEMP and 9A L9 & Below (S) - New Hire, 09NEMP

	Field Entry	Page View
ID	Enter Banner ID or the	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search	ID: * 100729833 Princess Peach Q
Query Date	Enter contract start date	Query Date: MM/DD/YYYY* 11/01/2018
Approval Category	Select Nonunion, ATNEMP or Union, 09NEMP	Approval Category: * AT - New Hire Salary, ATNEMP
Click	Go	All Jobs
Position	Please contact HR for position number.	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Princess Peach, 100729833
Suffix	Enter '00' as the suffix number	Approval Category: Admin Tech - New Hire Salary, ATNEMP
Select	Leave as default	Annual Paid - New Hire, GNEMP3 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Q New Job 6A9985 00 AT/Def Term*External Relations 1300, External Relations C
All Jobs and Next	Do not select	▲ There are no active jobs based on the Query Date.
Click	Go	All Jobs Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Full Employee Title	Enter the full employee title of	
	the new hire	
Sex	Select from dropdown	
SSN/SIN/TIN	Enter SIN	
Birth Date	Enter Birth Date	
Citizenship	Select from dropdown	
Supervisor ID	Enter the Banner ID of the	
	supervisor the employee will	
	directly report to	



Title (30 Char)	Short version of the employee title	Annual Paid - New Hire, 6A	9985-00 AT/D	Def Term*External Relations
Current Hire Date	Leave as default	Item	Current Value	New Value
Pay Effective Date	Leave as default	Job Change Reason: (Not Enterable	:)	72
Personnel Date	Leave as default	Sex: *	Female	Not Selected V
Job Begin Date	Leave as default	SSN/SIN/TIN: *	123456789	
Annual Salary	Enter annual salary	Citizenship: *	04/26/1997	Not Selected
Рау Туре	Leave as default	Supervisor ID: *		
Contract Type	Select Primary	Current Hire Date: MM/DD/YYYY		11/01/2018
Employee Status	Leave as default	Pay Effective Date: MM/DD/YYYY		11/01/2018
Employee Class Code	Leave as default	Job Begin Date: MM/DD/YYYY*		11/01/2018 11/01/2018
District Code	Not enterable	Annual Salary: \star		
Home COAS	Not enterable	Pay Type: Contract Type:		1 Primary
Home Organization	Enter or click on magnifying	Employee Status: (Not Enterable)		
	glass icon and select the correct	Employee Class Code: District Code: (Not Enterable)		GA OIT
	home organization code for	Home COAS: (Not Enterable)		U
	faculty/dept.	Home Organization: (Not Enterable Eactor: (Not Enterable))	3700
Factor	Not enterable	Pays: (Not Enterable)		26
Pays	Not enterable	Step:		
Step	Leave as default			

Field/ Step	Field Entry					P	Page Vi	ew				
Effective Date	Leave as default (Query Date)	Current	at 11/01/2019									_
COA	Leave as default	COA Index Fu	nd Organization	Account Progra	am Activity I	Location Projec	ct Cost Percer	nt Encumbrar	ce Override	e End Dat	e	
Fund	Defaults to type of position and faculty	New Effective Date:	MM/DD/YYYY 11/	/01/2018								
Organization	Defaults to type of position and faculty/dept	COA Index Q	Fund	Organization	Account	Program	Activity		Project	Cost	Percent 100.00	Encumbrance Override End Date
Account	Defaults to type of position and faculty/dept		Q Q							Totalı		
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	V Default from In	Save and Ad	dd New Rows							100.00	,



Activity	Leave as default unless BPO
	recommends otherwise
Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance Override	Leave as default
End Date	
Default from Index and	Do not select
Save and Add New	
Rows	

Field/ Step	Field Entry	Page View				
Job Change Reason	Leave as default					
Job Status	Not enterable	Enter Job END Information, 6A99	85-00 AT/Def Term*External Relations			
Job End Date	Not enterable	Item	Current Value			
Pay Effective Date	Enter as contract end date	Job Change Reason: Job Status: Job End Date: MM/DD/YYYY(Not Enterable Pay Effective Date: MM/DD/YYYY Personnel Date: MM/DD/YYYY	73, Contract Completion Terminated)			
Personnel Date	Enter as contract end date					

Field/ Step	Field Entry		Pag	ge View		
Approval Level – Top	Click on magnifying glass icon	Routing Queue				-
Row	and select the HR Advisor from	Approval Level	User Name		Required Acti	on
	the dropdown	10 - (ADVSR) HR Advisor	Q HRADM8	Gunther Friends	Approve	
Required Action	Leave as default	20 - (BPO) Departmental BPO's	HRADM9	Monica Geller	Approve	
Required Action		50 - (HR) HR Department	HRADM6	Fun Bobby	Approve	
Approval Level –	Click on magnifying glass icon	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
Second Row	and select the correct HR	Not Selected	✓ Q		Not Selected	~
Cocona non		Not Selected	✓ Q		Not Selected	\sim
	Dept/Faculty BPO from the	Not Selected	✓ Q		Not Selected	\checkmark
	dropdown	Not Selected	✓ Q.		Not Selected	\checkmark
Required Action	Leave as default	Save and Add New Rows				
Approval Level – Third	Click on magnifying glass icon					
Row	and select the correct HR					



	Department Approver from the dropdown
Required Action	Leave as default
Approval Level –	Click on magnifying glass icon
Fourth Row	and select HRCATALOGUOIT
Required Action	Leave as default
Save and Add New	Do not select
Rows	

NU L9 & Below (H) - New Hire, ATNEEH and 9H L9 & Below (H) - New Hire 09NEEH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying glass	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	icon to search by name	* - indicates a required field.
Query Date	Enter contract start date	ID: * 100729835 Super Mario
Approval	Select Nonunion, ATNEEH or Union	Query Date: MM/DD/YYYY* 11/30/2018
Category	09NEEH	Approval Category: * AT - New Hire Hourly, ATNEEH
Click	Go	Go
		A There are no active jobs based on the Query Date.
		All Jobs
Position	Please contact HR for position number.	Refer or search for a new position number and enter the suffix, or select the link under Title.
		ID: Super Marin, 100729835 Query Date: Nov 30, 2018
Suffix	Enter '00' as the suffix number	Approval Category: Admin Tech - New Hire Hourly, ATNEEH
		Hourly Paid - New Hite, GRENDH
Select	Leave as default	Search Type Position Sama Tube Time since organization state bace and bace states served Q New Job 649952 00 AT/Def Term*Advancement 1320, Advancement Image: state state state state state states
		A Three are no active jobs based on the Query Date.
Click	Go	edot IIA
		Next Approval Type

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Full Employee	Enter the full employee title of the new	
Title	hire	
Sex	Select from dropdown	



SSN/SIN/TIN	Enter SIN			
Birth Date	Enter Birth Date			
Citizenship	Select from dropdown			
Supervisor ID	Enter the Banner ID of the supervisor			
	the employee will directly report to			
Title (30	Short version of the Employee Title	Hourly Paid - New Hire, 6A99	52-00 AT/Def	f Term*Advancement
characters)		, ,		
Current Hire	Leave as default	Item Job Change Reason: (Not Enterable)	Current Value	New Value
Date		Full Employee Title:		
Pay Effective	Leave as default	Sex: *	Male	Not Selected V
Date		SSN/SIN/TIN: *	123456789	
Personnel	Leave as default	Birth Date: MM/DD/YYYY	01/01/1980	
Date		Citizenship:		Not Selected
Job Begin	Leave as default	Supervisor ID: *		
Date		Current Hire Date: MM/DD/XXX		11/20/2018
Pay Type	Not enterable	Pay Effective Date: MM/DD/YYYY		11/30/2018
Hourly Rate	Enter hourly rate in accordance with	Personnel Date: MM/DD/YYYY*		11/30/2018
	compensation structure	Job Begin Date: MM/DD/YYYY		11/30/2018
Hours per Pay	Enter hours in accordance with	Pay Type: (Not Enterable)		HRLY
(2 wks)	compensation structure	Hourly Rate: *		
Contract Type	Select Primary	Hours per Pay(2 wks):		
Timesheet	Click on the magnifying glass icon and			
Orgn	select the correct timesheet code for	Employee Status: (Not Enterable)		
	your faculty/dept. IF you are not sure of	Employee Class Code: (Not Enterable)	6H
	the Org. please email	District Code: *(Not Enterable)		ΟΙΤ
	Financesystems@uoit.ca	Home COAS: *(Not Enterable)		U
Employee	Not enterable	Home Organization: * (Not Enterable)		3700
Status				
Employee	Not enterable			
Class Code				
District Code	Not enterable			
Home COAS	Not enterable			



Field/ Step	Field Entry	Page View
Effective Date	Leave as default (query date)	Current Effective Date: 11/01/2018
COA	Leave as default	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
Fund	Defaults to type of position and faculty	New Effective Date: MM/DD/YYYY 11/01/2018
Organization	Defaults to type of position and	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
	faculty/dept	
Account	Defaults to type of position and	
	faculty/dept	Total:
Program	Defaults to type of position and	*
	faculty/dept. NOTE: When doing mass	Default from Index Save and Add New Rows
	uploads, leave the Program code blank	
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance	Leave as default	
Override End		
Date		

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Job END Information, 6A99	952-00 AT/Def Term*Advanceme
Job Status	Not enterable	Item	Current Value
Job End Date	Not enterable	Job Change Reason: (Not Enterable)	73
Pay Effective	Enter as contract end date	Job End Date: MM/DD/YYYY(Not Enterable Pay Effective Date: MM/DD/YYYY	
Date		Personnel Date: MM/DD/YYYY	
		lob Status: (Not Enterable)	
Personnel Date	Enter as contract end date	Sob Status. (Not Enterable)	1

Field/ Step	Field Entry	Page View
Approval Level – Top	Click on magnifying glass	
Row	icon and select the HR	
	Advisor from the dropdown	
Required Action	Leave as default	



Approval Level – Second Row	Click on magnifying glass icon and select the HR Dept/Faculty BPO from the dropdown				
Required Action		Routing Queue			
Approval Level – Third	Click on magnifying glass	Approval Level	User Name		Required Action
Row	icon and select the HR	10 - (ADVSR) HR Advisor	Q HRADM8	Gunther Friends	Approve
1.000		20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve
	Department Approver from	50 - (HR) HR Department	Q HRADM6	Fun Bobby	Approve
	the dropdown	90 - (HR-APP) HR Apply	HRCATALOGUOIT	UOIT HRMEP	Apply
Poquired Action	Leave as default	Not Selected			Not Selected
Required Action	Leave as delault	Not Selected	۹		Not Selected
		Not Selected	Q		Not Selected
Approval Level – Fourth	Click on magnifying glass	Save and Add New Rows	•		inter Selected
Row	icon and select	Save and Add New Kows			
1.000					
	HRCATALOGUUII				
Required Action	Leave as default				
Save and Add New Rows	Do not select				

NU L9 & Below (S) - Change Job, ATCJOB and 9A L9 & Below (S) - Change Job, O9CJOB

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. • Indicates a required field.
	magnifying glass icon to	ID: 100729833 Princess Peach Q
	search by name	Query Date: MM/DD/YYYY 11/28/2018
Query Date	Enter effective date Page	Approval Category: * AT - Change Job Salary, ATCJOB
	View at to reflect when the	Go
	salary of the contract changed	Employee Job Assignments Type Position/Suffix/Title Time Sheet Organization/Start Date End Date Last Paid Date/Status
Approval Category	Select Nonunion, ATCJOB or	Primary 6A9985 00 Communications Coordinator 3700, Human Resources Nov 01, 2018 Nov 02, 2019 Active
	Union position, 09CJOB	
Click	Go	
Position	Leave as default	
Suffix	Leave as default	



Select	Select the position which requires an salary change	= 10 Q1	Enter (): uery E	or search Date:	for a new p Princ Nov	osition nu ess Peac 28, 2018	mber and enter the suffix, or se h, 100729833	lect the link under Title.						
Click	Go	Approval Category: Admin Tech - Change Job Salary, ATCJOB AT/PM - Change Job Data, GCJOB2												
		Se	arch	Гуре	Position	Suffi	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select	
		Q,	. 1	New Job]						0	
			1	Primary	6A9985	00	Communications Coordinato	ar 3700, Human Resources	Nov 01, 2018	Nov 02, 2019	2	Active	۲	
			NII John											
			Next Ap	proval T	ype Go								_	

Field/ Step	Field Entry	Page View							
Job Change Reason	Select salary change reason								
	XX from dropdown	AT/PM - Change Job Data,	6A9985-00 Communic	ations Coordinator					
Pay Effective Date	Leave as default	Item	Current Value	New Value					
Personnel Date	Leave as default	Job Change Reason: \star	72	Not Selected	~				
Annual Salary	Enter revised amount	Pay Effective Date: MM/DD/YYYY	11/01/2018	11/28/2018					
Pav Type	Leave as default	Personnel Date: MM/DD/YYYY	11/01/2018	11/28/2018					
Supervisor ID	Supervisor's Banner ID	Pay Type:	1	1					
Title (30 Characters)	Short version of the Employee	Supervisor ID:	100729834						
	Title	Title(30 characters):	Communications Coordinator						
Hourly Rate	Leave as default	Hourly Rate:	28.83956						
Job Status	Leave as default	Job Status: Factor: (Not Enterable)	Active 26	Active	\checkmark				
Factor	Not enterable	Pays: (Not Enterable)	26	26					
Pays	Not enterable								

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (query date)	
COA	Leave as default	
Fund	Defaults to type of position	
	and faculty	
Organization	Defaults to type of position	
	and faculty/dept	
Account	Defaults to type of position	
	and faculty/dept	
Program	Defaults to type of position	
-	and faculty/dept. NOTE:	



Activity	When doing mass uploads, leave the Program code blank Leave as default unless BPO	Curre Effect COA I U	nt ive Date: 1 ndex Fund 10000	1/01/2018 Organizatio 00 1300	n Account Prog 62060 16	Iram Activity	Location Pro	ject Cost Perc	ent Encumbr	ance Overri	ide End D	ate	
	recommends otherwise	New	ve Date: MM		29/2010								
Location	Leave as default	COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Project	Leave as default	d v		Q 100000	Q 1300	Q 62060	Q 16	Q				100.00	
Cost	Leave as default	4		Q Q	Q	Q Q		Q				1	
Percent	Leave as default	9		٩	٩		٩	٩			Tatali		
Encumbrance Override End Date	Leave as default	✓ Def	aulting valu	es for Labor Dis	tribution from th d New Rows	ne Job records	I.				i otal:	100.00	
								_					

Field/ Step	Field Entry		Page View	
Job Change Reason	Leave as default	Enter Job END Information, 6A99	nunications Coordinator	
Job Status	Not enterable	Item	Current Value	New Value
Job End Date	Not enterable	Job Change Reason:	72	73, Contract Completion
Pav Effective Date	Enter as job end date from	Job Status: (Not Enterable)	Active	Т
.,	current value column	Job End Date: MM/DD/YYYY(Not Enterable	e) 11/02/2019	
		Pay Effective Date: MM/DD/YYYY	11/01/2018	11/02/2019
Personnel Date	Enter as job end date from	Personnel Date: MM/DD/YYYY*	11/01/2018	11/02/2019
	current value column			

Field/ Step	Field Entry		Pag	e View	
Approval Level –	Click on magnifying glass icon and	Routing Queue			
Top Row	select the HR Advisor from the	Approval Level	User Name		Required Action
	dropdown	10 - (ADVSR) HR Advisor	HRADM9	Monica Geller	Approve
Required Action	Leave as default	20 - (BPO) Departmental BPO's		Fun Bobby	Approve
Approval Level –	Click on magnifying glass icon and	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
Second Row	select the Dept/Faculty BPO from	Not Selected			Not Selected
	the dropdown	Not Selected			Not Selected V
Required Action	Leave as default	Not Selected	▼		Not Selected V
Approval Level – Third Row	Click on magnifying glass icon and select the HR Department Approver from the dropdown	Save and Add New Kows			
Required Action	Leave as default				



NU L9 & Below (H) - Change Job, ATCJBH and 9H L9 & Below (H) - Change Job, O9CJBH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying glass icon to search by name	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. • Indicates a required field.
Query Date Approval Category	Enter contract start date Select either Non Union ATCJBH or Union position O9CJBH	ID: # [10729835] Super Mario Query Date: HH/DD/YYYY 12/25/2018 × Approval Category: # AT - Change Job Hourly, ATCJBH Go
Click	Go	Employee Job Assignments Time Sheet Organization Start Date End Date Last Paid Date Status Ypr Position/Suffix[Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary/RA9952 00 External Relations Coordinator 1320, Advancement Nov 30, 2018 Active All Jobs Active Active Active Active Active
Position	Leave as default	 Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Super Mario, 100729835
Suffix	Leave as default	Query Date: Dec 05, 2018 Approval Category: Admin Tech - Change Job Hourly, ATCJBH
Select	Select the correct position to be	AT/PM - Change Job Data Hourly, GCJOBH Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
	changed	
Click	Go	Primary 6A9952 00 External Relations Coordinator 1320, Advancement Nov 30, 2018 Dec 31, 2018 Active Image: State of the state
		All Jobs Next Approval Type Go

Field/ Step	Field Entry
Job Change	Select appropriate change
Reason	reason
Full Employee	Enter the full employee title of
Title	the new hire
Pay Effective Date	Leave as default
Personnel Date	Leave as default
Pay Type	Not enterable



Hourly Rate	Enter the hourly rate from the Current Value column	AT/PM - Change Job Data	Hourly, 6A9952-00 Exte	rnal Relations Coordinator
Hours per Pay (2	Enter the changed hour	Item	Current Value	New Value
WKS)	amount	Job Change Reason: \star	72	Not Selected
Supervisor ID	Enter the Banner ID of the	Full Employee Title:		
	supervisor	Pay Effective Date: MM/DD/YYYY	11/30/2018	12/05/2018
Title (30	Short version of the Employee	Personnel Date: MM/DD/YYYY*	11/30/2018	12/05/2018
characters)	Title	Pay Type: (Not Enterable)	HRLY	HRLY
Timesheet Oran	Click on the magnifying glass	Hourly Rate:	28.95	
Timesheet Orgi	Click of the magnifying glass	Hours per Pay(2 wks):	40	
	Icon and select the code for	Supervisor ID:	100729834	
	your faculty/dept. IF not sure of	Title(30 characters):	External Relations Coordinator	
	the Org. please email	Timesheet Orgn:	1320	
	financesystems@uoit.ca	Job Status: (Not Enterable)	Active	A
Job Status	Leave as default			

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (query date)	Current
COA	Leave as default	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
Fund	Defaults to type of position and	0 1000001320 62060 16 100.00
	faculty	New
Organization	Defaults to type of position and	Effective Date: MM/DD/YYYY 12/05/2018
	faculty/dept	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date Q U Q 100000 Q 1320 Q 62060 Q 16 U 100.00 100.00 0
Account	Defaults to type of position and	
	faculty/dept	
Program	Defaults to type of position and	
	faculty/dept. NOTE: When	Total: 100.00
	doing mass uploads, leave the	Sefaulting values for Labor Distribution from the Job records.
	program code blank	Default from Index Save and Add New Rows
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	



Encumbrance	Leave as default	
Override End Date		

Field/ Step	Field Entry	Page View
Job Change	Leave as default	Enter Job END Information, 6A9952-00 External Relations Coordinator
Reason		Item Current Value New Value
Job Status	Not enterable	Job Change Reason: (Not Enterable) 73
Job End Date	Not enterable	Job End Date: MM/DD/YYYY(Not Enterable) Pay Effective Date: MM/DD/YYYY
Pay Effective Date	Enter as contract end date	Personnel Date: MM/DD/YYYY*
		Job Status: (Not Enterable)
Personnel Date	Enter as contract end date	

Field/ Step	Field Entry		Pag	ge View	
Approval Level –	Click on magnifying glass icon and	Routing Queue			
Top Row	select the HR Advisor from the	Approval Level U	Jser Name		Required Action
	dropdown	10 - (ADVSR) HR Advisor	HRADM8	Gunther Friends	Approve
Required Action	Leave as default	20 - (BPO) Departmental BPO's	HRADM9	Monica Geller	Approve
	Click on magnifying glass icon and	50 - (HR) HR Department			Approve
Apploval Level –	click on magnifying glass icon and	Not Selected			Not Selected
Second Row		Not Selected	2		Not Selected
	the dropdown	Not Selected V	2		Not Selected
Required Action	Leave as default	Not Selected	2		Not Selected
Approval Level – Third Row	Click on magnifying glass icon and select the correct HR Department Approver from the dropdown	Save and Add New Rows			
Required Action	Leave as default				
Approval Level – Fourth Row	Click on magnifying glass icon and select HRCATALOGUOIT				
Required Action	Leave as default				



NU L9 & Below - Terminate Job, ATTERM and OP L9 & Below - Terminate Job O9TERM

Field/ Step	Field Entry	Page View					
ID	Enter Banner ID or the magnifying glass icon to search by name	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. • - Indicates a required field. ID: # 100729833 Princess Peach Q.					
Query Date	Enter the new end date of the change	Query Date: MM/DD/YYYY% 11/28/2018					
Approval Category	Select Non Union, ATTERM or	Approval Category: * AT - Terminate Job, ATTERM					
Click	Go	Employee Job Assignments Time Sheet Organization End Date Last Paid Date Status Type Position Suffix Title Time Sheet Organization End Date Last Paid Date Status Primary/6A9985 00 Communications Coordinator S700, Human Resources Nov 01, 2018 Nov 02, 2019 Active					
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title.					
Suffix	Leave as default	ID: Princess Peach, 100729833 Query Date: Nov 28, 2018					
Select	Select the appropriate position to be terminated	Approval Category: Admin Tech - Terminate Job, ATTERM					
Click	Go	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select					
		Primary 6A9985 00 Communications Coordinator 3700, Human Resources Nov 01, 2018 Nov 02, 2019 Active					
		All Jobs Next Approval Type Go					

Field/ Step	Field Entry		Page View
Job Change	Leave as default	Enter Job End Date for Pay Effective Date, 6A9985-00 Co	ommunications Coordinator
Reason		Item Current Value New Value	
Job End Date	Not Enterable	Job Change Reason: (Not Enterable) 72 ETOD Job End Date: MM/DD/YYYY(Not Enterable) 11/02/2019	
Pay Effective Date	Enter as Job End Date from current value column	Pay Effective Date: MM/DD/YYYY, 11/01/2018 11/02/2019 Job Status: (Not Enterable) Active L Annual Salary: 52488	
Annual Salary	Leave as default	Enter New Contract End Date, 6A9985-00 Communicatio	ons Coordinator
		Item Current Value New Value	
Job Change Reason	Leave as default	Job Change Reason: *(Not Enterable) 72 ETND Pay Effective Date: MM/DD/YYYY* 11/01/2018 11/28/2018	
Pay Effective Date	Enter as query date	Job Status: #(Not Enterable) Active L Annual Salary: 52488]



Personnel Date	Enter as query date
Job Status	Not enterable
Annual Salary	Enter the value from the current
	value column

Field/ Step	Field Entry		Pag	e View		
Approval Level –	Click on magnifying glass icon and	Routing Queue				
Top Row	select the HR Advisor from the dropdown	Approval Level 10 - (ADVSR) HR Advisor	User Name	Monica Geller	Required Acti Approve	on
Required Action	Leave as default	20 - (BPO) Departmental BPO's 90 - (HR-APP) HR Apply	READM29	Chandler Bing	Approve	
Approval Level –	Click on magnifying glass icon and	Not Selected			Not Selected	~
Second Row	dropdown	Not Selected			Not Selected	~
Required Action	Leave as default	Not Selected Save and Add New Rows			Not Selected	~
Approval Level – Third Row	Click on magnifying glass icon and select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add	Do not select					
New Rows						

NU L9 & Below (S) - Rehire, ATXEMP and 9A L9 & Below (S) - Rehire O9XEMP

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying	The second secon
	glass icon to search by name	regulates a required field. ID: IO(220822) Princess Reach Q
Query Date	Enter contract start date	
Approval Category	Select Nonunion, ATXEMP or	Approval Category: * AT - Rehire Salary, ATXEMP V
	Union, O9XEMP	Go
Click	Go	Employee Job Assignments
		Primary Salabases 00 Communications Coordinator 3700, Human Resources Nov 01, 2018 Nov 02, 2019 Active
Position	Enter position number as indicated	
	by EPAF Summary sheet	



Suffix Select Click	Enter the next suffix number if it has the same position number. If the position number is different, the suffix can be '00' again Leave as default Go	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Princess Peach, 100729833 Query Date: Sep 04, 2019 Approval Category: Admin Tech - Rehire Salary, ATXEMP Annual Paid - Rehire, GXEMP2 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Startch Type Communications Coordinator 3700, Human Resources New Job Image: Start Type All Jobs Next Approval Type Co
Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	Annual Paid - Rehire, 6A9985-00 Communications Coordinator
Full Employee Title	Enter the full rehire's employee	Item Current Value New Value
	title	Job Change Reason: *(Not Enterable) 72 72
Supervisor ID	Enter the Banner ID of the	Full Employee Title:
	supervisor the employee will	Title(30 characters): * Communications Coordinator
	directly report to	Current Hire Date: MM/DD/YYYY* 11/01/2018
Title (30 Characters)	Enter the rehire's employee title	Pay Effective Date: MM/DD/YYYY 11/01/2018 09/04/2019
Current Hire Date	Leave as default	Personnel Date: MM/DD/YYYY 11/01/2018 09/04/2019 Job Begin Date: 11/01/2018 09/04/2019
Pay Effective Date	Leave as default	Annual Salary: * 52488
Personnel Date	Leave as default	Pay Type: 1
Job Begin Date	Leave as default	Contract Type: (Not Enterable) Primary s
Annual Salary	Enter annual salary as indicated	Employee Status: (Not Enterable) Active A
	by HR Partner and Hiring	Step: (Not Enterable) 0 0
	supervisor	Home COAS: U Q
Pay Type	Leave as default	Home Organization: 3700, Human Resources Q 3700
Contract Type	Leave as default	Pactor: (Not Enterable) 26 26
Employee Status	Leave as default	
Employee Class	Leave as default	
Code		
Step	Not enterable	
District Code	Not enterable	
Home COAS	Not enterable	
Home Organization	Enter your home organization or	
	select the magnifying glass to find	
	your organization code	
Factor	Not enterable	



Pays	Not enterable							
Field/ Step	Field Entry	Page View						
Effective Date	Leave as default (query date)							
COA	Leave as default							
Fund	Defaults to type of position and							
	faculty							
Organization	Defaults to type of position and							
_	faculty/dept							
Account	Defaults to type of position and	Current						
	faculty/dept	Effective Date: 11/01/2018						
Program	Defaults to type of position and	U 100000 1300 62060 16 100.00						
J	faculty/dept. NOTE: When doing							
	mass uploads, leave the Program	New Effective Date: MM/DD/YYYY approx/2010						
	code blank	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date						
Activity	Leave as default unless BPO							
	recommends otherwise							
Location	Leave as default							
Project	Leave as default	Total:						
Cost	Leave as default	Defaulting values for Labor Distribution from the Job reserve						
Percent	Leave as default	Default from Index Save and Add New Rows						
Encumbrance	Leave as default							
Override End Date								
Default from Index	Do not select							
and Save and Add								
New Rows								

Field/ Step	Field Entry	Page View		
Job Change Reason	Leave as default	Enter Job END Information, 6A9985-00 Communications Coordinator		
Job Status	Not enterable			
Job End Date	Not enterable	Job Change Reason:	72	73, Contract Completion
Pay Effective Date	Enter as contract end date	Job Status: Job End Date: MM/DD/YYYY(Not Enterable	Active e) 11/02/2019	Terminated V
		Pay Effective Date: MM/DD/YYYY	11/01/2018	09/30/2020
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY *	11/01/2018	09/30/2020


Field/ Step	Field Entry		Pag	e View		
Approval Level –	Click on magnifying glass icon and	Routing Queue				
Top Row	select the correct HR Advisor from	Approval Level User Na	ame		Required Actio	on
	the dropdown	10 - (ADVSR) HR Advisor	DM8	Gunther Friends	Approve	
Required Action	Leave as default	20 - (BPO) Departmental BPO's	DM9	Monica Geller	Approve	
Required Action		50 - (HR) HR Department	DM6	Fun Bobby	Approve	
Approval Level –	Click on magnifying glass icon and	90 - (HR-APP) HR Apply	ATALOGUOIT	UOIT HRMEP	Apply	
Second Row	select the correct Dept/Faculty	Not Selected			Not Selected	~
	BPO from the drondown	Not Selected			Not Selected	~
		Not Selected			Not Selected	~
Required Action	Leave as default	Not Selected			Not Selected	~
Approval Level – Third Row	Click on magnifying glass icon and select the correct HR Department Approver from the dropdown					
Approval Level – Fourth Row	Click on magnifying glass icon and select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New	Do not select					
Rows						

NU Level 9 and below Rehire Hourly, ATXEEH and OPSEU Level 9 and below Rehire Hourly, O9XEEH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or the magnifying glass	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	icon to search by name	
Query Date	Enter contract start date	10: * 100729835 Super Mario
Approval	Select Non Union (ATXEEH) or Union	Query Date: MM/DD/YYYY 01/01/2019 Approval Category: * AT - Rehire Hourty, ATXFFH
Category	(O9XEEH)	Go
Click	Go	Employee Job Assignments
		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 6A9952 00 External Relations Coordinator 1320, Advancement Nov 30, 2018 Dec 31, 2018 Active
		All Jobs



Position	Please contact HR for a new position	
	number if a new position is being create. Or	Enter or search for a new position number and enter the suffix, or select the link under Title.
	use current position number.	ID: Super Mario, 100729835
Suffix	Enter '01' as the suffix number OR the next	Query Date: Jan 01, 2019
	suffix in the sequence for this position	Approval Category: Authin Tech - Renne Houry, ATAEEn
Select	Leave as default	Hourly Paid - Rehire, GXEMPH
		Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
Click	Go	New Job 6A9952 01 AT/Def Term*Advancement 1320, Advancement
		▲ There are no active jobs based on the Query Date.
		All Jobs
		Next Approval Type Go

Field/ Step	Field Entry		Page	e View
Job Change	Leave as default	Hourly Paid - Rehire, 6A995	2-01 AT/Def Term*Advance	ment
Reason		Item	Current Value	New Value
Full Employee	Enter the full employee title of the new	Job Change Reason: (Not Enterable)	72
Title	hire	Full Employee Title:		
Supervisor ID	Enter the Banner ID of the supervisor	Supervisor ID: *		
	the employee will directly report to	Current Hire Date: MM/DD/YYYY	11/30/2018	01/01/2019
Title (30	Enter the full employee title of the new	Pay Effective Date: MM/DD/YYYY		01/01/2019
characters)	hire	Personnel Date: MM/DD/YYYY		01/01/2019
Current Hire	Leave as default	Job Begin Date: MM/DD/YYYY*		01/01/2019
Date		Hourly Rate: *		HRLY
Pay Effective	Leave as default	Hours per Pay(2 wks):		40
Date		Contract Type:	,	Secondary V
Personnel Date	Leave as default	Timesheet Orgn: * Employee Status: (Not Enterable)	Active	
Job Begin Date	Leave as default	Employee Class Code: *	6H, Limited Term Level 1-9 Hourly	
Pay Type	Not enterable	Home COAS:	U	
Hourly Rate	Enter hourly rate in accordance with	Home Organization:	3700, Human Resources	3700
-	compensation structure and collective	Step. (Not Enterable)		0
	agreements concerning position			
Hours per Pay (2	Enter hours in accordance with			
wks)	compensation structure and collective			
	agreements concerning position			
Contract Type	Leave as default			



Timesheet Orgn	Click on the magnifying glass icon and select the code for your faculty/dept. IF you are not sure of the Org. please email
	Financesystems@uoit.ca
Employee Status	Not enterable
Employee Class	Not enterable
Code	
Home COAS	Not enterable
Home	Enter or click on magnifying glass
Organization	icon and select the correct home
	organization code for faculty/dept.
Step	Not enterable

Field/ Step	Field Entry						F	Page Vi	ew					
Effective Date	Leave as default (same as query date)	Curre Effect COA I	nt tive Date: 0 Index Fund	01/01/2019 Organization	Account Progra	am Activity I	Location Proje	ct Cost Percer	nt Encumbrar	nce Override	e End Dat	e		
COA	Leave as default	New												
Fund	Defaults to type of position and faculty		Index	Fund Q 100000	01/2019 Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance (verride End Date
Organization	Defaults to type of position and	0												
	faculty/dept	Q			Q	<u> </u>								
Account	Defaults to type of position and faculty/dept	٩					Q				Total:	100.00	D	
Program	Defaults to type of position and	✓ Defai	ult from Index	Save and A	ld New Rows									
-	faculty/dept. NOTE: When doing													
	mass uploads, leave the Program													
	code blank													
Activity	Leave as default unless BPO													
	recommends otherwise													
Location	Leave as default													
Project	Leave as default													
Cost	Leave as default													
Percent	Leave as default													



Encumbrance Override End Date	Leave as default
Default from Index and Save and Add	Do not select
New Rows	

Field/ Step	Field Entry		Page View	
Job Change Reason	Leave as default	Entor Job END Information 6000	152 00 External Balations Coordinator	
Job Status	Not enterable	Enter Job END Information, 6A99	52-00 External Relations Coordinator	
Job End Date	Not enterable	Item	Current Value New Value	
Pay Effective Date	Enter as contract end date	Job Change Reason: (Not Enterable)	73	
5		Job End Date: MM/DD/YYYY(Not Enterable)	
		Pay Effective Date: MM/DD/YYYY*		
		Personnel Date: MM/DD/YYYY		
Personnel Date	Enter as contract end date	Job Status: (Not Enterable)	τ	

Field/ Step	Field Entry		Pa	ge View	
Approval Level – Top	Click on magnifying glass and	Routing Queue			
Row	select the HR Advisor	Approval Level	User Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor	RADM8	Gunther Friends	Approve
Approval Level – Second	Click on magnifying glass and	20 - (BPO) Departmental BPO's		Monica Geller	Approve
Row	select the Dept/Faculty BPO	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
1.00	select the Depth dealty Di C	Not Selected	۹.	Ĩ	Not Selected
Required Action	Leave as default	Not Selected	۹.		Not Selected
Approval Level	Click on magnifying glass	Not Selected V	٩,		Not Selected V
	and soloct the UP	Not Selected	۵.		Not Selected
		Save and Add New Rows			
	Department Approver				
Required Action	Leave as default				
Approval Level	Click on magnifying glass				
	and select the				
Required Action					
Required Action	Leave as default				
Save and Add New Rows	Do not select				



NU L10 & Above (S) - New Hire, PMNEMP and 8A L10 & Above (S) - New Hire, O8NEMP

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass to search by name	∗ - indicates a required field.
Query Date	Enter contract start date	ID: * 100729836 Wacky Wario Q
Approval	Select Nonunion, PMNEMP and Union	Query Date: MM/DD/YYYY* 11/30/2018
Category	08NEMP	Approval Category: * PM - New Hire Salary, PMNEMP
Click	Go	Go
		A There are no active jobs based on the Query Date.
Position	Please contact HR for position number.	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Wacky Warlo, 100729836 Output: Data: New 20, 2019
Suffix	Enter '00' as the suffix number	Approval Category: Prof Mgr - New Hire Salary, PMNEMP
		Annual Paid - New Hire, GNEMP3 Search Type Position Suffix Title Time Sheet Organization Start DateEnd DateLast Paid DateStatus/Select
Select	Leave as default	OL New Job 549976 00 PM/Def Term*Advancement 1320, Advancement 380
Click	Go	There are no active jobs based on the Query Date. All Jobs Next Approval Type Go



Field/ Step	Field Entry			Page View	
Job Change	Leave as default	Annual Paid - New Hire, 5A9	976-00 PM/D	Def Term*Advancement	
Reason		76	0	Now Value	
Full Employee	Enter the full employee title of the new	Job Change Reason:	Current value	72, Contract Position	\sim
Title	hire	Full Employee Title:			
Sex	Copy Current Value or select from	Sex: \star	Male	Not Selected V	
	dropdown	SSN/SIN/TIN: *	123456789		
SSN/SIN/TIN	Enter SIN	Birth Date: MM/DD/YYYY	02/02/1992		
Birth Date	Enter Birth Date	Citizenship: *		Y, Citizen	1
Citizenship	Select from dropdown	Title(30 characters): +]
Supervisor ID	Enter the Banner ID of the supervisor	Current Hire Date: MM/DD/YYYY		11/30/2018	
	the employee will directly report to	Pay Effective Date: MM/DD/YYYY*		11/30/2018	
Title (30	Enter the full employee title of the new	Personnel Date: MM/DD/YYYY*		11/30/2018	
characters)	hire	Job Begin Date: MM/DD/YYYY		11/30/2018	
Current Hire	Leave as default	Annual Salary: \star			
Date		Рау Туре:		1	
Pay Effective	Leave as default	Contract Type:		Primary V	
Date		Employee Status: (Not Enterable)			
Personnel	Leave as default	District Code: (Not Enterable)			
Date		Home COAS: (Not Enterable)		U	
Job Begin	Leave as default	Home Organization: (Not Enterable)	3700	
Date		Factor:		26	
Annual Salary	Enter annual salary as indicated by HR	Pays:		26	
	Partner and Hiring supervisor	Step:		0	
Pay Type	Leave as default				
Contract Type	Select Primary				
Employee	Leave as default				
Status					
Employee	Leave as default				
Class Code					
District Code	Not enterable				
Home COAS	Not enterable				
Factor	Not enterable				
Pays	Not enterable				
Step	Leave as default				



Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as Query	Current Effective Date: 11/30/2018
	Date)	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
COA	Leave as default	New
Fund	Defaults to type of position and faculty	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
Organization	Defaults to type of position and	
	faculty/dept	
Account	Defaults to type of position and	
	faculty/dept	
Program	Defaults to type of position and	100.00
	faculty/dept. NOTE: When doing mass	Default from Index Save and Add New Rows
	uploads, leave the Program code blank	
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance	Leave as default	
Override End		
Date		
Default from	Do not select	
Index and Save		
and Add New		
Rows		

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Job END Information, 5A997	76-00 PM/Def Term*Advanceme
Job Status	Not enterable	Item	Current Value New Value
Job End Date	Not enterable	Job Change Reason: (Not Enterable)	73
Pay Effective Date	Enter as contract end date	Job Status: (Not Enterable)	Т
,		Job End Date: MM/DD/YYYY(Not Enterable)	
		Pay Effective Date: MM/DD/YYYY	
		Personnel Date: MM/DD/YYYY*	
Personnel Date	Enter as contract end date		



Field/ Step	Field Entry		Paç	ge View		
Approval Level – Top Row	Click on magnifying glass and select the HR Advisor	Routing Queue				
Required Action	Leave as default	Approval Level 10 - (ADVSR) HR Advisor	Q HRADM8	Gunther Friends	Approve	on
Approval Level – Second	Click on magnifying glass and	20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve	
Row	select the Dept/Faculty BPO	50 - (HR) HR Department	Q HRADM6	Fun Bobby	Approve	
Poquired Action	Leave as default	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
Required Action		Not Selected			Not Selected	~
Approval Level – Third	Click on magnifying glass and	Not Selected		┥└─────	Not Selected	~
Row	select the HR Department	Not Selected			Not Selected	~
	Approver	Save and Add New Rows	· •		Not Selected	
Required Action	Leave as default					
Approval Level – Fourth	Click on magnifying glass and					
Row	select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New Rows	Do not select					

NU L10 & Above (H) - New Hire, PMNEEH and 8H L10 & Above (H) - New Hire, O8NEEH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	👎 Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to	* - indicates a required field.
	search by name	
Query Date	Enter contract start date	10: * 100729837 Yoshi Yoyo
Approval Category	Select Nonunion, PMNEEH or	Query Date: MM/DD/YYYY* 11/30/2018
	Union O8NEEH	Approval Category: * PM - New Hire Hourly, PMNEEH
Click	Go	Go
		A There are no active jobs based on the Query Date.
		All Jobs
Position	Please contact HR for position	
	number.	
Suffix	Enter '00' as the suffix number	



Select	Leave as default	Enter or search for a new position number and enter the suffix, or select the	e link under Title.
Click	Go	ID: Yoshi Yoyo, 100729837 Query Date: Nov 30, 2018 Approval Category: Prof Mgr - New Hire Hourly, PMNEEH Hourly Paid - New Hire, GNEMPH Search Type Search Type Position Suffix Title Q New Job SA9977 00 PM/Def Term*Comm & Marketing 1 A There are no active jobs based on the Query Date. All Jobs Next Approval Type Go	Time Sheet Organization Start Date End Date Last Paid Date Status Select 1310, Communications & Marketing Image: Start Date Status Select Status

Field/ Step	Field Entry			Page View
Job Change Reason	Leave as default	Hourly Paid - New Hire, 5A99	977-00 PM/De	ef Term*Comm & Marketing
Full Employee Title	Enter the full employee title of	Item	Current Value	New Value
	the new hire	Job Change Reason:		72, Contract Position
Sex	Copy current value or select	Full Employee Title:		
	from dropdown	Sex: *	Male	Not Selected V
SSN/SIN/TIN	Enter SIN	SSN/SIN/TIN: *	123456789	
Birth Date	Enter Birth Date	Citizenshin:	07/27/1903	Not Selected
Citizenship	Select from dropdown	Supervisor ID: *		
Supervisor ID	Enter the Banner ID of the	Title(30 characters): \star		
	supervisor the employee will	Current Hire Date: MM/DD/YYYY*		11/30/2018
	directly report to	Pay Effective Date: MM/DD/YYYY*		11/30/2018
Title (30 characters)	Enter the full employee title of	Personnel Date: MM/DD/YYYY*		11/30/2018
	the new hire	Job Begin Date: MM/DD/YYYY		11/30/2018
Current Hire Date	Leave as default	Hourly Rate:		HRLY
Pay Effective Date	Leave as default	Hours per Pay(2 wks):		40
Personnel Date	Leave as default	Contract Type: (Not Enterable)		P
Job Begin Date	Leave as default	Timesheet Orgn: \star		Q
Pay Type	Leave as default	Employee Status: (Not Enterable)		A
Hourly Rate	Enter hourly rate in accordance	Employee Class Code: (Not Enterable	e)	5H
,	with compensation structure	District Code: *(Not Enterable)		
	and collective agreements	Home CUAS: *(Not Enterable))	
	concerning position	nome organization. *(Not Enterable)	3700



Hours per Pay (2 wks)	Enter hours in accordance with
	componentian attracture and
	compensation structure and
	collective agreements
	concerning position
Contract Type	Select Primary
Timesheet Orgn	Click on the magnifying glass
	icon and select the code for
	vour faculty/dept. IF you are
	not sure of the Org please
	ampil Financosystems Quoit co
Employee Status	Not enterable
Employee Class Code	Not enterable
District Code	Not enterable
Home COAS	Not enterable
Home Organization	Enter or click on magnifying
, č	glass icon and select the
	correct home organization
	code for faculty/dept.

Field/ Step	Field Entry							Page Vi	ew				
Effective Date	Leave as default (same as Query Date)	Curren Effect COA I	nt ive Date: 1 ndex Fund	1/30/2018 Organizatior	n Account Progr	am Activity I	Location Proje	ct Cost Percen	t Encumbrar	ice Override	e End Date	e	
COA	Leave as default	New	vo Dato: Mk		/20/2012								
Fund	Defaults to type of position and faculty		Index	Fund Q 100000	1/30/2018 Organization	Account	Program		Location	Project	Cost	Percent 100.00	Encumbrance Override End Date
Organization	Defaults to type of position and faculty/dept	\$ \$ \$ \$											
Account	Defaults to type of position and faculty/dept	م			Q						Total:	100.00	
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	Defau	ılt from Inde>	x Save and A	Add New Rows								
Activity	Leave as default unless BPO recommends otherwise												



Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance Override	Leave as default
End Date	
Default from Index and	Do not select
Save and Add New	
Rows	

Field/ Step	Field Entry	Page View					
Job Change Reason	Leave as default	Enter Job END Information, 5A99	77-00 PM/Def Term*Comm & Marketing				
Job End Date	Not enterable						
Pay Effective Date	Enter as contract end date	Item	Current Value New Value				
		Job Change Reason:	73, Contract Completion 🗸				
		Job End Date: MM/DD/YYYY(Not Enterable)					
Personnel Date	Enter as contract end date	Pay Effective Date: MM/DD/YYYY*					
		Personnel Date: MM/DD/YYYY					
Job Status	Leave as default	Job Status:	Terminated V				
1							

Field/ Step	Field Entry			Page View	
Approval Level – Top	Click on magnifying glass icon	Routing Queue			
Row	and select the HR Advisor	Approval Level	User Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor		Gunther Friends	Approve
Approval Level –	Click on magnifying glass icon	20 - (BPO) Departmental BPO's	HRADM9	Monica Geller	Approve
Second Pow	and coloct the Dont/Eaculty	50 - (HR) HR Department		Fun Bobby	Approve
Second Row		Not Selected			Not Selected V
De avrine el Action		Not Selected	✓ Q		Not Selected
Required Action	Leave as default	Not Selected	✓ Q		Not Selected V
Approval Level – Third	Click on magnifying glass icon	Not Selected	✓ Q		Not Selected
Row	and select the HR Department	Save and Add New Rows			
	Approver				
Required Action	Leave as default				



Approval Level – Fourth Row	Click on magnifying glass icon and select HRCATALOGUOIT
Required Action	Leave as default
Save and Add New	Do not select
Rows	

NU L10 & Above (S) - Change Job PMCJOB and O8 L10 & Above (S) - Change Job O8CJOB

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Reter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass icon to search by name	* - Indicates a required new.
Query Date	Enter effective date to reflect when	Ouery Date: MM/DD/YYYY* 12/05/2018
	the salary of the contract changed	Approval Category: PM - Job Info Change Salary, PMCJOB
Approval	Select Non Union, PMCJOB or Union,	Go
Category	O8CJOB	Employee Job Assignments Type Position/SuffX/Title Time Sheet Organization/Start Date End Date Last Paid Date/Status
Click	Go	Primary SA9976 00 Manager, Strategic Initiatives 3700, Human Resources Nov 30, 2018 Mar 29, 2019 Active All Jobs
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title.
		ID: Wacky Wario, 100729836 Query Date: Dec 05, 2018
Suffix	Leave as default	Approval Category: Prof Mgr - Change Job Salary, PMCJOB
Calast	Colort a critica which as a vince on infe	AT/PM - Change Job Data, GCJOB2
Select	Select position which requires an info	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Q New Job
	change	
Click	Go	Primary 5A9976 00 Manager, Strategic Initiatives 3700, Human Resources Nov 30, 2018 Mar 29, 2019 Active
		All Jobs
		Next Approval Type Go
Field/ Step	Field Entry	Page View
Job Change	Select correct change reason from	
Reason	dropdown	
Pay Effective	Leave as default	
Date		



Personnel Date	Leave as default	AT/PM - Change Job Data, 5/	A9976-00 Manage	r, Strategic Initiatives
		Item	Current Value	New Value
		Job Change Reason: \star	72	Not Selected
		Pay Effective Date: MM/DD/YYYY * (Not Enterable)	11/30/2018	12/05/2018
		Personnel Date: MM/DD/YYYY*(Not Enterable)	11/30/2018	12/05/2018
		Annual Salary:	89544	
		Pay Type:	1	
		Supervisor ID:	100729834	
		Title(30 characters):	Manager, Strategic Initiatives	
		Hourly Rate: (Not Enterable)	49.2	
		Job Status: (Not Enterable)	Active	A
		Factor: (Not Enterable)	26	26
		Pays: (Not Enterable)	26	26
Annual Salary	Enter revised amount			
Pay Type	Leave as default			
Supervisor ID	Supervisor's Banner ID			
Title (30	Enter Title from current value column			
Characters)				
Hourly Rate	Leave as default			
Job Status	Leave as default			
Factor	Not enterable			
Pays	Not enterable			

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query	
	date)	
COA	Leave as default	
Fund	Defaults to type of position and faculty	
Organization	Defaults to type of position and	
	faculty/dept	
Account	Defaults to type of position and	
	faculty/dept	



Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	Curren Effecti	it ve Date: 1	1/30/2018		anna Antiniti	Legation Deci	iast Cast Bara			la End Di	•		
Activity	Leave as default unless BPO recommends otherwise	U	10000	0 1320	62061 16	gram Activity	Location Proj	100 International 100	.00	ance Overrid	ie End Da	ite		
Location	Leave as default	New		(
Project	Leave as default	COA	index	Fund	05/2018 Organizatior	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Ov	erride End Date
Cost	Leave as default	QU		Q 100000	Q 1320	Q 62061	Q 16	Q				100.00		
Percent	Leave as default	Q]				
Encumbrance	Leave as default	۹ 		<u> </u>		<u> </u>								
Override End Date		مر 									Total:	100.00		
Default from	Do not select	✓ Defa Defaul	ulting valu	es for Labor Di	stribution from I dd New Rows	he Job record:	s.							
Index and Save														
and Add New		I												
Rows		L												

Field/ Step	Field Entry	Page View						
Job Change	Leave as default	Enter Joh END Information E40076 00 Manager Chrotegie Initiatives						
Reason		Enter Job END Information, SA9	Enter Job END Information, SA9976-00 Manager, Strategic Initiatives					
Job Status	Not enterable	Item	Current Value Ne	ew Value				
Job End Date	Not enterable	Job Change Reason: (Not Enterable)	72	73				
Pay Effective	Enter as job end date from current	Job Status: (Not Enterable)	Active	г				
Dale		Job End Date: MM/DD/YYYY(Not Enterable) 03/29/2019					
Personnel Date	Pate Enter as job end date from current	Pay Effective Date: MM/DD/YYYY*	11/30/2018					
value column	Personnel Date: MM/DD/YYYY*	11/30/2018						

Field/ Step	Field Entry	Page View
Approval Level – Top Row	Click on magnifying glass icon and select the HR Advisor	



Required Action	Leave as default				
Approval Level – Second	Click on magnifying glass				
Row	icon and select the				
	Dept/Faculty BPO	Routing Oueue			
Required Action	Leave as default		Ison Namo		Dequired Action
		10 - (ADVSR) HR Advisor		Manica Caller	Approve
Approval Level – Third	Click on magnifying glass	20 (BBO) Departmental BBO/s		Fun Bakhu	Approve
Pow	icon and soloct the HP	20 - (BPO) Departmental BPO's	HRADMO	Fun Bobby	Approve
IXOW		50 - (HR) HR Department	~ HRADM9	Monica Geller	Approve
	Department Approver	90 - (HR-APP) HR Apply	* HRCATALOGUOIT	UOIT HRMEP	Apply
Required Action	Leave as default	Not Selected	۲		Not Selected V
Required Action		Not Selected 🗸 🗸	2		Not Selected V
		Not Selected 🗸 🗸	2		Not Selected
Approval Level – Fourth	Click on magnifying glass	Not Selected	2		Not Selected
Row	icon and select	Save and Add New Rows			
	HRCATALOGUOIT				
Required Action	Leave as default				
Save and Add New Rows	Do not select				

NU L10 & Above (H) - Change Job, PMCJBH and 8H L10 & Above (H) - Change Job O8CJBH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass icon to search by name	* - indicates a required field.
Query Date	Enter contract start date	ID: * 100729837 Yoshi Yoyo
Approval	Select Nonunion PMCJBH or Union	Query Date: MM/DD/YYYY 12/12/2019
Category	08CJBH	Approval Category: * PM - Job Info Change Hourly, PMCJBH
Click	Go	Go
		Employee Job Assignments
		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status
		All lobs
Position	Leave as default	
Suffix	Leave as default	



Select	Select the correct position to be changed	ت 10 ور	Enter or): uery Da	r search	for a new pos Yoshi Y Dec 12	ition nu 'oyo, 1 , 2018	umber and enter the suffix, or select t 100729837 3	he link under Title.					
Click	Go	A1	pprova	l Cate <u>c</u> Chang	gory: Prof Mg ne Job Data	pr - Ch Hourl	nange Job Hourly, PMCJBH Iv, GCJOBH						
		Se	arch T	ype	Position	Suffi	xTitle	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
		٩	N	lew Job									0
			P	rimary	5A9977	00	Manager, Mass Communications	1310, Communications & Marketing	Nov 30, 2018	3Dec 31, 2018	3	Active	۲
		/	All Jobs Next App	proval T ₁	ype Go								

Field/ Step	Field Entry		Pa	ige View
Job Change	Select as appropriate to	AT/PM - Change Job Data	Hourly, 5A9977-00 Manag	ger, Mass Communications
Reason	circumstances of change	Itom	Current Value	New Value
Full Employee	Enter the full employee title of the	Job Change Reason: 🖌	72	Not Selected
Title	new hire	Full Employee Title:		
Pay Effective	Leave as default	Pay Effective Date: MM/DD/YYYY	11/30/2018	12/12/2018
Date		Personnel Date: MM/DD/YYYY*	11/30/2018	12/12/2018
Personnel Date	Leave as default	Pay Type: (Not Enterable)	HRLY	HRLY
Pay Type	Not enterable	Hourly Rate:	45	
Hourly Rate	Enter hourly rate in accordance	Supervisor ID:	100729834	
,	with compensation structure and	Title(30 characters):	Manager, Mass Communications	
	collective agreements concerning	Timesheet Orgn:	1310	۹
	position	Job Status: (Not Enterable)	Active	A
Hours per Pay	Enter hours in accordance with			
(2 wks)	compensation structure and			
	collective agreements concerning			
	position			
Supervisor ID	Enter the Banner ID of the			
	supervisor the employee will			
	directly report to			
Title (30	Enter the full employee title of the			
characters)	new hire			
Timesheet Orgn	Click on the magnifying glass			
-	icon and select the code for your			
	faculty/dept. IF you are not sure			



	of the Org. please email Financesystems@uoit.ca
atus	Leave as default

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query date)	Current Effective Date: 11/30/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
COA	Leave as default	U 100000 1310 62061 16 100.00
Fund	Defaults to type of position and faculty	New Effective Date: MM/DD/YYYY 12/12/2018
Organization	Defaults to type of position and faculty/dept	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date Q U Q 100000 1310 62061 Q 16 100.00 100.00 Q
Account	Defaults to type of position and faculty/dept	
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	Total: 100.00 V Defaulting values for Labor Distribution from the Job records. Default from Index Save and Add New Rows
Activity	Leave as default unless BPO recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance Override End Date	Leave as default	
Default from Index and Save and Add New Rows	Do not select	

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Job Status	Not enterable	
Job End Date	Not enterable	



Pay Effective Date	Enter as contract end date	Enter Job END Information,	5A9977-00 Mana	iger, Mass Communi	cations
		Item	Current Value	e New Value	
		Job Change Reason: (Not Enterable) 72	73	
Doroonnol Doto	Entor as contract and data	Job End Date: MM/DD/YYYY(Not En	terable) 12/31/2018		
Personner Date	Enter as contract end date	Pay Effective Date: MM/DD/YYYY*	11/30/2018		
		Personnel Date: MM/DD/YYYY	11/30/2018		
		Job Status: (Not Enterable)	Active	Т	
Field/ Step	Field Entry			Page View	
Approval Level - Top	Click on magnifying glass icon			l ago hon	
		Routing Queue			
Row	and select the HR Advisor	Approval Level	User Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor		Gunther Friends	Approve
	Click on magnifying glassicon	20 - (BPO) Departmental BPO's	HRADM9	Monica Geller	Approve
Appioval Level -		50 - (HR) HR Department	HRADM6	Fun Bobby	Approve

	Click on mognifying glossioon					
Approvar Lever –	Click on magnifying glassicon	50 - (HR) HR Department	HRADM6	Fun Bobby	Approve	
Second Row	and select the Dept/Faculty BPO	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
Required Action	Leave as default	Not Selected	2		Not Selected	\sim
		Not Selected	2		Not Selected	~
Approval Level – Third	Click on magnifying glass icon	Not Selected	<u>ــــــــــــــــــــــــــــــــــــ</u>		Not Selected	~
Pow	and coloct the UP Department	Not Selected	۸. 		Not Selected	\sim
NUW		Save and Add New Rows				
	Approver					
Required Action	Leave as default					
Approval Level –	Click on magnifying glass icon					
Fourth Row	and select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New	Do not select					
Rows						
110003						

NU L10 & Above -Terminate Job, PMTERM and O8 L10 & Above -Terminate Job O8TERM

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	
	glass icon to search by name	
Query Date	Enter the new end date of the change	
Approval	Select Nonunion, PMTERM or Union	
Category	08TERM	



Click	Go										
		🔍 Ente	er an ID o	or select the	link to	search for an ID. Enter the O	Query Date and select the A	pproval Categ	gory. Select Go		
		\star - ind	icates a	required fi	eld.						
		ID: * [1007298	36 V	Vacky \	Vario					
		Query	Date: M	IM/DD/YYY	Y * 12	/21/2018					
		Appro	val Cate	gory: 🛊	PM	- Terminate Job, PMTERM		~]		
		Go									
		Emplo	yee Jol	b Assignm	ents						
		Туре	Positi	ion Suffix 1	itle	Tiı	ne Sheet Organization	Start Date	End Date	Last Paid Date	Status
		Primar	y 5A997	76 00 N	lanage	er, Strategic Initiatives 37	00, Human Resources	Nov 30, 20	18 Mar 29, 20	19	Active
		OL IIA	bs								
Position	Leave as default	👎 Enter	r or search	n for a new pos	ition nu	mber and enter the suffix, or sel	ect the link under Title.				
Suffix	Leave as default	ID:		Wacky	Wario,	100729836					
		Query	Date:	Dec 21	, 2018 ur Tor	minata lab DMTEDM					
Select	Select the appropriate position to be	Аррго		gory: Pror Mg	ji - iei	minate Job, PMTERM					
	terminated	Enter 2	ob End	Date for Pay	/ Effect	tive Date, GETRM					
Click	Go	Search	New lot	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date Status	s Select
			NCW JOL	·							0
			Primary	5A9976	00	Manager, Strategic Initiative	s 3700, Human Resources	Nov 30, 201	8 Mar 29, 2019	Active	۲
			1								
		Next	Annroval T	vne Go							
		Next	Approval 1	,pc 00							

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Job End Date	Enter date from current value	
	column	
Pay Effective Date	Enter as Job End Date for	
	current value column	
Annual Salary	Leave as default	
Job Change Reason	Indicate the change reason by	
_	selecting the appropriate	
	option	



Pay Effective Date	Enter as query date	Enter Job End Date for Pay Ef	fective Date, 5/	A9976-00 Manager,	Strategic Initiatives
Personnel Date	Enter as query date				
Job Status	Not enterable	Item	Current Valu	ie New Value	
Annual Salary	Leave as default	Job Change Reason: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enter Pay Effective Date: MM/DD/YYYY Job Status: (Not Enterable) Annual Salary: Enter New Contract End Date	72 rable) 03/29/2019 11/30/2018 Active 89544 , 5A9976-00 Ma	ETOD 03/29/2019 L anager, Strategic In	itiatives
		Item	Current Value New	w Value	
		Job Change Reason: *(Not Enterable)	72 E	TND	
		Pay Effective Date: MM/DD/YYYY	11/30/2018 12	2/21/2018	
		Personnel Date: MM/DD/YYYY*	11/30/2018	2/21/2018	
		Job Status: *(Not Enterable)	Active L		
		Annual Salary:	89544		

Field/ Step	Field Entry			Page View		
Approval Level – Top	Click on magnifying glass icon	Routing Queue				
Row	and select the HR Advisor	Approval Level	User Name		Required Action	
Required Action	Leave as default	20 - (BPO) Departmental BPO's	RADM9	Chandler Bing	Approve	
Approval Level –	Click on magnifying glass icon	90 - (HR-APP) HR Apply		× UOIT HRMEP	Apply	1
Second Row	and select Departmental BPO	Not Selected	a		Not Selected	
Required Action		Not Selected	۹		Not Selected	
		Not Selected V Save and Add New Rows	~		Not Selected	
Approval Level – Third	Click on magnifying glass icon					
Row	and select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New	Do not select					
Rows						



NU L10 & Above (S) - Rehire, PMXEMP and 8A L10 & Above (S) - Rehire 8AXEMP

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying glass icon to search by name	 Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. indicates a required field.
Query Date	Enter contract start date Select Nonunion PMXEMP or	ID: * 100729836 Wacky Wario
Click	Union 8AXEMP Go	Query Date: MM/DD/YYYY* 04/01/2019 Approval Category: * PM - Rehire Salary, PMXEMP Go
		Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 5A9976 00 Manager, Strategic Initiatives 3700, Human Resources Nov 30, 2018 Mar 29, 2019 Active All Jobs All Jobs Active Active Active
Position	Enter position number as indicated by EPAF Summary sheet	 Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Wacky Wario, 100729836
Suffix	Enter '01' as the suffix number if it has the same position number.	Query Date: Apr 01, 2019 Approval Category: Prof Mgr - Rehire Salary, PMXEMP Annual Paid - Rehire, GXEMP2
	is different, the suffix can be '00' again	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select New Job SA9976 01 PM/Def Term*Advancement 1320, Advancement Image: Same Sheet Image: Same Sheet
Select	Leave as default	A There are no active jobs based on the Query Date.
Click	Go	Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Full Employee Title	Enter the full rehire's	
	employee title	
Supervisor ID	Enter the Banner ID of the	
	supervisor the employee will	
	directly report to	



Title (30 Characters) Current Hire Date	Enter the full rehire's employee title Leave as default	Annual Paid - Rehire, 5A997	76-01 PM/Def Term*Advancem	nent
Pay Effective Date Personnel Date Job Begin Date Annual Salary	Leave as default Leave as default Leave as default Enter annual salary as indicated by HR Partner and	Item Job Change Reason: * Full Employee Title: Supervisor ID: * Title(30 characters): *	Current Value No	ew Value 72, Contract Position
	Hiring supervisor	Current Hire Date: MM/DD/YYYY* Pay Effective Date: MM/DD/YYYY*	11/30/2018	04/01/2019 04/01/2019
Contract Type	Leave as default	Job Begin Date: MM/DD/YYYY* Annual Salary: *		04/01/2019 04/01/2019
Employee Status Employee Class Code	Leave as default Leave as default	Pay Type: Contract Type:		1 Secondary V
Step Home COAS	Not enterable Not enterable	Employee Status: (Not Enterable) Employee Class Code: *	Active 5A, Limited Term Level 10 & Up Sal \mathbb{Q}	
Home organization	Enter or click on magnifying glass icon and select the correct home organization code for faculty/dept.	Step: (Not Enterable) Home COAS: (Not Enterable) Home Organization: (Not Enterable) Factor: (Not Enterable) Pays: (Not Enterable)	U) 3700, Human Resources	0 U 3700 26 26
Factor Pays	Not enterable Not enterable			

Field/ Step	Field Entry						Р	age Vie	ew				
Effective Date	Leave as default (same as Query Date)	Currer Effecti COA Ir	nt ve Date: 0 ndex Fund	4/01/2019 Organization #	Account Progra	m Activity Le	ocation Projec	t Cost Percen	t Encumbran	ce Override	End Date	e	
COA	Leave as default	New											
Fund	Defaults to type of position and	Effectiv	/e Date: MM	/DD/YYYY 04/0	01/2019	Account	Drogram	Activity	Location	Broject	Cost	Dorcont	Encumbranco Ovorrido End Dato
	faculty	QU		Q 100000	Q 1320	Q 62061	16 Nogram		Location			100.00	
Organization	Defaults to type of position and												
0	faculty/dept	Q											
Account	Defaults to type of position and	٩		Q	٩	Q	Q	Q			Totalı		
	faculty/dept										TOLAI	100.00	
Program	Defaults to type of position and	S											
-	faculty/dept. NOTE: When doing	Defaul	it from Index	Save and Add	New Rows								



	mass uploads, leave the Program
A ath its s	
ACTIVITY	Leave as default unless BPO
	recommends otherwise
Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End Date	
Default from Index	Do not select
and Save and Add	
New Rows	

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Joh END Information 5400	76 01 DM/D of Town & Advon company
Job Status	Not enterable	Enter Job END Information, 5A99	776-01 PM/Det Term*Advancement
Job End Date	Not enterable	Item	Current Value New Value
Pay Effective Date	Enter as contract end date	Job Change Reason: (Not Enterable)	73
		Job Status: (Not Enterable)	Т
		Job End Date: MM/DD/YYYY(Not Enterable)
Personnel Date	Enter as contract end date	Pay Effective Date: MM/DD/YYYY*	
		Personnel Date: MM/DD/YYYY*	

Field/ Step	Field Entry	Page View
Approval Level –	Click on magnifying glass icon and	
Top Row	select the HR Advisor	
Required Action	Leave as default	
Approval Level –	Click on magnifying glass icon and	
Second Row	select the Dept/Faculty BPO	
Required Action	Leave as default	



Approval Level – Third Row	Click on magnifying glass icon and select the HR Department	Routing Queue				
	Approver	Approval Level	User Name	7	Required Actio	n
Description of Alerticity		10 - (ADVSR) HR Advisor	HRADM8	Gunther Friends	Approve	
Required Action	Leave as default	20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve	
		50 - (HR) HR Department	RADM6	Fun Bobby	Approve	
Approval Level –	Click on magnifying glass icon and	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
		Not Selected	۹ 🛛		Not Selected	~
Fourth Row	Select ARCATALOGUUT	Not Selected	۹ 🗌		Not Selected	~
		Not Selected	Q		Not Selected	~
Required Action	Leave as default	Not Selected	Q		Not Selected	~
Save and Add New	Do not select	Save and Add New Rows				
Rows						

NU L10 & Above (S) - Rehire, PMXEEH and 8H L10 & Above (H) - Rehire O8XEEH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	
	magnifying glass icon to search by	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	name	* - indicates a required field.
Query Date	Enter contract start date	ID: * 100729837 Yoshi Yoyo
Approval Category	Select – Nonunion, PMXEEH or	Query Date: MM/DD/YYYY* 11/30/2018
		Approval Category: * PM - Rehire Hourly, PMXEEH
Click	Go	Go
		Employee Job Assignments
		I ype Position Sumix Inte I inter Start Date End Date Last Paid Date Status
		All Jobs
Position	Enter position number as indicated	
FOSITION	by EBAE Summary shoot	
	Dy EFAF Summary Sheet	
Suffix	Enter '01' as the suffix number	
Select	Leave as default	



Click	Go		r or search Date: val Cate	i for a new pos Yoshi \ Nov 30 gory: Prof Ma Pebire, GXEI	ition nu 'oyo, 10 , 2018 gr - Ref 4PH	nber and enter the suffix, or select th 10729837 ire Hourly, PMXEEH	e link under Title.					
		Search	туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date Sta	tus Sele	ect
		Q	New Job	5A9977	01	PM/Def Term*Comm & Marketing	1310, Communications & Marketing				۲	>
			Primary	5A9977	00	Manager, Mass Communications	1310, Communications & Marketing	Nov 30, 2018	Dec 31, 2018	B Act	ive)
		All Jol	approval T	ype Go			I	1	1	1	1	

Field/ Step	Field Entry		Page	View
Job Change	Leave as default	Hourly Paid - Rehire, 5A9977	7-01 PM/Def Term*Comm &	Marketing
Reason		Item	Current Value	lew Value
Full Employee	Enter the full employee title of the	Job Change Reason: (Not Enterable)		72
Title	new hire	Full Employee Title:		
Supervisor ID	Enter the Banner ID of the supervisor	Title(30 characters): *		
	the employee will directly report to	Current Hire Date: MM/DD/YYYY	11/30/2018	11/30/2018
Title (30	Enter the full employee title of the	Pay Effective Date: MM/DD/YYYY*		11/30/2018
characters)	new hire	Personnel Date: MM/DD/YYYY		11/30/2018
Current Hire	Leave as default	Pay Type: *(Not Enterable)		HRLY
Date		Hourly Rate: \star		
Pay Effective	Leave as default	Hours per Pay(2 wks):		40
Date		Contract Type: Timesheet Oran: •	C	Primary V
Personnel Date	Leave as default	Employee Status: (Not Enterable)	Active	A
Job Begin Date	Leave as default	Employee Class Code: \star	5H, Limited Term Level 10 & Up Hr $^{ m G}$	
Pay Type	Not enterable	Home COAS: (Not Enterable)	U	
Hourly Rate	Enter hourly rate in accordance with	Step: (Not Enterable)	3700, Human Resources	3700
	compensation structure and collective			<u> </u>
	agreements concerning position			
Hours per Pay (2	Enter hours in accordance with			
wks)	compensation structure and collective			
	agreements concerning position			



Contract Type	Leave as default
Timesheet Orgn	Click on the magnifying glass icon
	and select the code for your
	faculty/dept. IF you are not sure of
	the Org. please email
	Financesystems@uoit.ca
Employee Status	Not enterable
Employee Class	Not enterable
Code	
Home COAS	Not enterable
Home	Leave as default
Organization	
Step	Not enterable

Field/ Step	Field Entry						F	Page Vi	ew					
Effective Date	Leave as default (same as query date)	Currer Effecti COA II	nt ive Date: 1 ndex Fund	1/30/2018 Organization	Account Progra	ım Activity I	Location Proje	ct Cost Perce	nt Encumbrar	ice Override	e End Date	e		_
COA	Leave as default	New												
Fund	Defaults to type of position and faculty		Index	Fund Q 100000	/30/2018 Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Ov	verride End Date
Organization	Defaults to type of position and	ď												
	faculty/dept	0		Q	Q									
Account	Defaults to type of position and	٩		Q	Q.	Q	Q	Q			Total:			
	faculty/dept										Totan	100.00)	
Program	Defaults to type of position and	 ✓ 												
	faculty/dept. NOTE: When doing	Derau	It from Index	Save and Ad	Id New Rows									
	mass uploads, leave the Program													
	code blank													
Activity	Leave as default unless BPO													
	recommends otherwise													
Location	Leave as default													
Project	Leave as default													
Cost	Leave as default													
Percent	Leave as default													



Encumbrance Override End Date	Leave as default
Default from Index	Do not select
and Save and Add	
New Rows	

Field/ Step	Field Entry	Page View					
Job Change Reason	Leave as default	Enter Job END Information, 5A99	077-01 PM/Def Term*Comm & Marketing				
Job End Date	Not enterable	Item	Current Value New Value				
Pay Effective Date	Enter as contract end date	Job Change Reason: (Not Enterable)	73				
		Job End Date: MM/DD/YYYY(Not Enterable					
		Pay Effective Date: MM/DD/YYYY					
		Personnel Date: MM/DD/YYYY*					
Personnel Date	Enter as contract end date	Job Status: (Not Enterable)	Τ				
Job Status	Not enterable						

Field/ Step	Field Entry		Pa	ge View		
Approval Level –	Click on magnifying glass icon and	Routing Queue				_
Top Row	select the HR Advisor	Approval Level U	lser Name		Required Actio	on
Required Action	Leave as default	10 - (ADVSR) HR Advisor	HRADM8	Gunther Friends	Approve	
Approval Level –	Click on magnifying glass icon and	20 - (BPO) Departmental BPO's		Monica Geller	Approve	
Second Row	select the Dept/Faculty BPO	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
Required Action	Leave as default	Not Selected V	2		Not Selected	\sim
		Not Selected	<u>}</u>		Not Selected	~
Approval Level –	Click on magnifying glass icon and	Not Selected			Not Selected	~
Third Row	select the HR Department	Save and Add New Rows	×		Not Selected	•
	Approver					
Required Action	Leave as default					
•						
Approval Level –	Click on magnifying glass icon and					
Fourth Row	select the HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New	Do not select					
Rows						



Post-Doctoral - New Hire, PDNEMP

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass icon to search by name	- indicates a required field
Query Date	Enter contract start date	
Approval	Select PD – New Hire, PDNEMP	ID: * 100729838 Captain Toad
Category		
Click	Go	Query Date: MM/DD/YYYY* 11/30/2018
		Approval Category: * PD - New Hire, PDNEMP
		Go
		igta There are no active jobs based on the Query Date.
		All Jobs
Position	Enter position number as indicated by	Enter or search for a new position number and enter the suffix, or select the link under Title.
	EPAF Summary sheet	ID: Captain Toad, 100729838
Suffix	Enter '00' as the suffix number	Query Date: Nov 30, 2018
		Approval Category: Post Docs - New Hire, PDNEMP
Select	Leave as default	Dest Dess New Une DDNCC
		Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
All Jobs	Do not select	New Job 209961 OO Post Doc*Sci 2700, Faculty of Science
and Next		
Approval		▲ There are no active jobs based on the Query Date.
Туре		All Jobs
Click	Go	Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Sex	Copy Current Value or select from	
	dropdown	
SSN/SIN/TIN	Enter SIN	
Birth Date	Enter Birth Date	
Citizenship	Select from dropdown	



Supervisor ID	Enter the Banner ID of the supervisor the							
	ampleves will directly report to	Post Docs - New Hire, 2U990	61-00 Post Do	c*Sci				
	employee will directly report to							
Current Hire	Leave as default	Item	Current Value	New Value				
Date		Job Change Reason: \star		72, Contract Position	~			
Pay Effective	Leave as default	Sex: *	Male	Not Selected 🗸				
Date		SSN/SIN/TIN: 🗶	123456789					
Personnel	Leave as default	Birth Date: MM/DD/YYYY	02/01/1984					
Date		Citizenship: \star		Not Selected				
Job Begin	Leave as default	Supervisor ID: \star						
Date		Current Hire Date: MM/DD/YYYY*	11/30/2018					
Annual	Enter annual salary as indicated by HR	Pay Effective Date: MM/DD/YYYY	11/30/2018					
Salary	Partner and Hiring supervisor and CBA	Personnel Date: MM/DD/YYYY	11/30/2018					
Contract	Select Primary	Job Begin Date: MM/DD/YYYY	11/30/2018					
Туре		Annual Salary: *						
Employee	Leave as default	Contract Type:		Primary ×				
Status		Employee Status:		Active	\sim			
Employee	Leave as default	Employee Class Code:	(
Class Code		District Code: *(Not Enterable)						
District Code	Not enterable	Home COAS: +(Not Enterable)						
Home COAS	Not enterable	Home Organization: (Not Esterable)						
Home Org	Not enterable	Chara (Net Enterable)	=)	3700				
Step	Not enterable	Step: (Not Enterable)						
Factor	Leave as default	Factor: (Not Enterable)		26				
Pays	Not enterable	Pays: (Not Enterable)		26				

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as	
	query date)	
COA	Leave as default	
Fund	Defaults to type of position	
	and faculty	
Organization	Defaults to type of position	
-	and faculty/dept	



Account	Defaults to type of position and faculty/dept													
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	Currei Effecti COA II New	nt ive Date: 1 ndex Fund	1/30/2018 Organization /	Account Progra	m Activity L	ocation Projec	ct Cost Percen	t Encumbrar	nce Override	: End Dat	e		
Activity	Leave as default unless BPO	Effecti	ve Date: MM	I/DD/YYYY 11/3	80/2018		_					-		
-	recommends otherwise	COA Q U	Index	Fund Q 100000	Organization Q 2700	Account 62143	Program Q 10		Location	Project	Cost	Percent 100.00	Encumbrance O	verride End Date
Location	Leave as default													
Project	Leave as default	0												
Cost	Leave as default	٩		Q	Q.	Q	Q.	Q						
Percent	Leave as default										Total:	100.00)	
Encumbrance Override End Date	Leave as default	 ✓ Defau 	lt from Inde>	Save and Ad	i New Rows									
Default from Index and	Do not select													
Save and Add New														
Rows														

Field/ Step	Field Entry	Page View							
Job Change Reason	Leave as default	Enter Job END Information, 2U99	61-00 Post Doc*Sci						
Job Status	Not enterable								
Job End Date	Not enterable	Item Job Change Reason:	Z3 Contract Completion						
Pay Effective Date	Enter as contract end date	Job Status: (Not Enterable)	T						
		Job End Date: MM/DD/YYYY(Not Enterable)							
		Pay Effective Date: MM/DD/YYYY*	11/30/2019						
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY*	11/30/2019						

Field/ Step	Field Entry	Page View
Approval Level – Top	Click on magnifying glass	
Row	icon and select the HR	
	Advisor from the dropdown	
Required Action	Leave as default	



Approval Level – Second Row	Click on magnifying glass icon and select the Dept/Faculty BPO				
Required Action	Leave as default	Routing Queue			
		Approval Level	User Name		Required Action
Approval Level – Third	Click on magnifying glass	10 - (ADVSR) HR Advisor	RADM8	Gunther Friends	Approve
		20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve
ROW	Icon and select the HR	50 - (HR) HR Department	RADM6	Fun Bobby	Approve
	Department Approver	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
Required Action	Leave as default	Not Selected	✓ Q.		Not Selected V
required / tellori		Not Selected	✓ Q.		Not Selected V
		Not Selected	✓ Q		Not Selected V
Approval Level – Fourth	Click on magnifying glass and	Not Selected	✓ Q		Not Selected
Row	select HRCATALOGUOIT	Save and Add New Rows			
1.00					
Required Action	Leave as default				
Save and Add New Rows	Do not select				

Post-Doctoral – Change Job (PD – Job Info Change, PDCJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass icon to search by name	* - indicates a required field.
Query Date	Enter effective date of the change	ID: * 100729838 Captain Toad Q
Approval	Select PD – Job Info Change, PDCJOB	
Category		Approval Category: *
Click	Go	Go
		Employee Job Assignments
		Type Position Suffix Time Sheet Organization Start Date End Date Last Paid Date Status Primary 2U9961 00 Post Doc*Sci 3700. Human Resources Nov 30. 2018 Nov 30. 2019 Active
		All Jobs
Position	Leave as default	
Suffix	Leave as default	
Salaat	Coloct the enprepriete position to change	
Select	select the appropriate position to change	
	changeu	



Click	Go	Enter or search for a new position number and enter the suffix, or select the link under Title.										
		ID:		Captair	Toad,	100729838						
		Query	Date:	Dec 20	, 2018							
		Appro	val Cate	Jory: Post Do	ocs - Ch	g Job Data, P	DCJOB					
		Post D	ocs - Ch	g Job Data, l	PDCJB	2						
		Search	туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
		Q	New Job									0
												\cup
			Primary	2U9961	00	Post Doc*Sci	3700, Human Resources	Nov 30, 2018	Nov 30, 2019		Active	
												۲
		All Jobs										
		Next A	Approval T	ype Go								

Field/ Step	Field Entry		Page V	iew
Job Change Reason	Indicate the change reason by selecting the appropriate dropdown	Post Docs - Chg Job Data,	2U9961-00 P	ost Doc*Sci
Citizenship	Options Y, Citizen or N, Non-	Item	Current Value	New Value
Davi	Citizen	Job Change Reason: 🜟	72	Not Selected
Pay Effective	column	Citizenship: \star	Y, Citizen	Not Selected
Date		Pay Effective Date: MM/DD/YYYY	11/30/2018	12/20/2018
Personnel	Enter data from current value	Personnel Date: MM/DD/YYYY*	11/30/2018	12/20/2018
Date	column	Supervisor ID: •	100729834	
Supervisor	Enter the Banner ID of the		20000	
ID	supervisor	Alliludi Salary.	39000	
Annual	Enter as per specified	Job Status:	Active	Active 🗸
Salary		Step: (Not Enterable)	0	0
Job Status	Leave as default	Eactor: (Not Entorphia)	26	
Step	Not enterable	Factor: (Not Enterable)	20	26
Factor	Not enterable	Pays: (Not Enterable)	26	26
Pays	Not enterable			



Field/ Step	Field Entry						F	Page Vi	ew				
Effective Date	Leave as default (same as query date)	Curre	it ive Date: 1	1/30/2018									
COA	Leave as default	COA I	ndex Fund	Organizatio	on Account Prog	ram Activity	/ Location Proj	ect Cost Perc	ent Encumbr	ance Overrie	de End D	ate	
Fund	Defaults to type of position and faculty	U	10000	00 2700	62143 10			100	0.00				
Organization	Defaults to type of position and	New											
	faculty/dept	Effectiv	ve Date: MM	1/DD/YYYY 12/	/20/2018								
Account	Defaults to type of position and	COA Q U	Index	Fund Q 100000	Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Override End Date
	faculty/dept	Q.				٩							
Program	Defaults to type of position and												
	faculty/dept. NOTE: When doing mass	Q			Q.	٩	Q.	Q					
	uploads, leave the Program code blank										Total:	100.00)
Activity	Leave as default unless BPO	🕑 Defa	aulting valu	es for Labor Di	stribution from tl	he Job record	s.						
	recommends otherwise	Defau	lt from Inde>	Save and A	dd New Rows								
Location	Leave as default												
Project	Leave as default												
Cost	Leave as default												
Percent	Leave as default												
Encumbrance	Leave as default												
Override End													
Date													
Default from	Do not select												
Index and Save													
and Add New													
Rows													

Field/ Step	Field Entry	Page View							
Job Change Reason	Leave as default unless EPAF change requires	Enter Job END Information, 2U9961-00 Post Doc*Sci							
	otherwise	Item	New Value						
Job Statua	Net enterable	Job Change Reason:	72	73, Contract Completion	\sim				
JOD Status	Not enterable	Job Status: (Not Enterable)	Active	Т					
Job End Date	Not enterable	Job End Date: MM/DD/YYYY(Not Enterable) 11/30/2019						
Pay Effective Date	Enter as contract job end date	Pay Effective Date: MM/DD/YYYY*	11/30/2018						
	from current value column	Personnel Date: MM/DD/YYYY	11/30/2018						



Personnel Date	Enter as contract end date of	
	semester as per contract end	
	dates for Academic Year	

Field/ Step	Field Entry		Pa	ge View	
Approval Level – Top	Click on magnifying glass	Routing Queue			
Row	icon and select the faculty	Approval Level	User Name		Required Action
	BPO from the dropdown	10 - (ADVSR) HR Advisor	HRADM29	Chandler Bing	Approve
Required Action	Leave as default	20 - (BPO) Departmental BPO's	HRADM9	Monica Geller	Approve
		50 - (HR) HR Department	HRADM6	Fun Bobby	Approve
Approval Level – Second	Click on magnifying glass	90 - (HR-APP) HR Apply	HRCATALOGUOIT	UOIT HRMEP	Apply
Row	icon and select the HR	Not Selected			Not Selected
1.0M	Department Approver from	Not Selected	✓ Q		Not Selected
	Department Approver from	Not Selected	✓ Q		Not Selected V
	the dropdown	Not Selected			Not Selected
Required Action	Leave as default	Save and Add New Rows			
Approval Level – Third	Click on magnifying glass				
Row	icon and select				
	HRCATALOGUOIT				
Required Action	Leave as default				

Post-Doctoral - Terminate Job (PD – Terminate Job, PDTERM)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	The second secon
	magnifying glass icon to search	* - indicates a required field.
	by name	10729838 Captain Toad %
Query Date	Enter the new end date of the	Query Date: MM/DD/YYYY 12/21/2018 Approval Category: * PD - Terminate Job, PDTERM
	change	Go
Approval Category	PD – Terminate Job, PDTERM	Employee Job Assignments
Click	Go	Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status
		All Jobs
Position	Leave as default	
Suffix	Leave as default	



Select	Select the appropriate position to be terminated	TD: Ouers	Enter D: uerv I	or search Date:	for a new pos Captair Dec 21	ition nu n Toad, . 2018	mber and enter 100729838	the suffix, or select the link ur	nder Title.				
Click	Go	Approval Category: Post Docs - Terminate Job, PDTERM		PDTERM									
		Se	earch	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	elect
		Q	•	New Job									0
				Primary	2U9961	00	Post Doc*Sci	3700, Human Resources	Nov 30, 2018	Nov 30, 2019		Active	۲
			All Jobs	5									
			Next Ap	pproval Ty	ype Go								

Field/ Step	Field Entry			Pa
Job Change Reason	Leave as default	Enter Job End Date for Pay	Effective Dat	e, 2U9961-00
Job End Date	Enter data from current value	Item	Current Value	New Value
	column	Job Change Reason: (Not Enterable) 72	ETOD
Pay Effective Date	Enter as Job End Date from	Job End Date: MM/DD/YYYY	11/30/2019	11/30/2019
	current value column	Job Status: (Not Enterable)	Active	11/30/2019 L
Annual Salary	Leave as default	Annual Salary:	39000	
Job Change Reason	Indicate the change reason by	Enter New Contract End Dat	e 2U9961-0	10 Post Doc*Sc
	selecting the appropriate		.0, 200001 0	01030000
	dropdown option	Item	Current Valu	
Pay Effective Date	Enter as query date	Pay Effective Date: MM/DD/YYYY*	11/30/2018	12/21/2018
Personnel Date	Enter as query date	Personnel Date: MM/DD/YYYY*	11/30/2018	12/21/2018
Job Status	Not enterable	Job Status: *(Not Enterable)	Active	L
Annual Salary	Leave as default	Allitual Salary.	33000	

Field/ Step	Field Entry	Pa	age View	
Approval Level – Top	Click on magnifying glass icon	Routing Queue		
Row	and select the HR Advisor	Approval Level User Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor	Monica Geller	Approve
Approval Level –	Click on magnifying glass icon	20 - (BPO) Departmental BPO's	Chandler Bing	Approve
Second Row	and select the Faculty BPO	90 - (HR-APP) HR Apply \mathbf{k} RCATALOGUOIT Not Selected \mathbf{k} Q	× UOIT HRMEP	Apply Not Selected
Required Action	Leave as default	Not Selected		Not Selected V
		Not Selected Q		Not Selected V
Approval Level – Third	Click on magnifying glass icon	Not Selected		Not Selected
Row	and select HRCATALOGUOIT	Save and Add New Rows		
Required Action	Leave as default			



Save and Add New Rows	Do not select	
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Post-Doctoral - Rehire (PD – Rehire, PDXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying glass icon to search	 Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. indicates a required field. ID: * 100729838 Captain Toad Q.
Query Date Approval Category Click	Enter contract start date PD – Rehire, PDXEMP Go	Query Date: MM/DD/YYYY* 12/01/2019 Approval Category: * PD - Rehire, PDXEMP Go Employee Job Assignments Type PositionSuffix Title Time Sheet OrganizationStart Date Last Paid Date Status Primary 2U9961 00 Post Doc*Sci 3700, Human Resources Nov 30, 2019 Active
Position	Enter position number as indicated by EPAF Summary sheet	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Captain Toad, 100729838 Query Date: Dec 01, 2019 Approxup Cathereum Post Decome Pobles DDXEMP
Suffix	Enter '01' as the suffix number if it has the same position number. If however the position number is different, the suffix can be '00' again	Post Docs - Rehire, PDXEE2 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Q New Job 20961 01 Post Doc*Sci 2700, Faculty of Science Image: Comparison of the second s
Select	Leave as default	All Jobs
Click	Go	

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Citizenship	Options Y, Citizen or N, Non-	
	Citizen	
Supervisor ID	Enter the Banner ID of the	
	supervisor	
Current Hire Date	Leave as default	
Pay Effective Date	Leave as default	
Personnel Date	Leave as default	


Job Begin Date	Leave as default	Post Docs - Rehire, 2U9961-01 Post Doc*Sci					
Annual Salary	Enter annual salary as indicated						
,	by HR Partner and Hiring	Item Job Change Reason: * (Not Enterable)	Current Value N	ew Value 72			
	supervisor	Citizenship: \star	Y, Citizen	Not Selected			
Contract Type	Leave as default	Supervisor ID: \star					
Employee Status	Leave as default	Current Hire Date: MM/DD/YYYY*	11/30/2018	12/01/2019			
Employee Class	Enter as 2U	Pay Effective Date: MM/DD/YYYY * Personnel Date: MM/DD/YYYY *		12/01/2019 12/01/2019			
	Natantarahla	Job Begin Date: MM/DD/YYYY		12/01/2019			
Home COAS	Not enterable	Annual Salary: \star					
Home Organization	Enter or click on magnifying	Contract Type:		Secondary 🗸			
	glass icon and select the correct	Employee Status:	Active	Active			
	home organization code for	Employee Class Code: *	2U, Postdoctoral Fellows 🔍				
	faculty/dept.	Home COAS: *(Not Enterable)	U 3700 Human Resources	U			
Step	Leave as default	Step:	5700, Human Resources	0			
Factor	Not enterable	Factor: (Not Enterable)		26			
Pays	Not enterable	Pays: (Not Enterable)		26			

Field/ Step	Field Entry	Page View												
Effective Date	Leave as default (same as query date)	Currei Effect COA I	nt ive Date: 1 ndex Fund	2/01/2019 Organization	Account Progra	ım Activity I	ocation Proje	ct Cost Percer	it Encumbrar	ice Override	e End Date	e		
COA	Leave as default	New	ue Dates Mi											
Fund	Defaults to type of position and faculty		Index	Fund Q 100000	Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance O	verride End Date
Organization	Defaults to type of position and faculty/dept	۲ ۵ ۵				۵ ۵								
Account	Defaults to type of position and faculty/dept	۵				<u></u>	Q				Total:	100.00)	
Program	Defaults to type of position and faculty/dept. NOTE: When doing	✔ Defau	ult from Inde>	Save and Ad	dd New Rows									
	mass uploads, leave the Program code blank													
Activity	Leave as default unless BPO													
	recommends otherwise													
Location	Leave as default													



Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End Date	
Default from Index	Do not select
and Save and Add	
New Rows	

Field/ Step	Field Entry	Page View					
Job Change Reason	Leave as default	Enter Job END Information, 2U9961-01 Post Doc*Sci					
Job Status	Not enterable	Item	Current Value New Value				
Job End Date	Not enterable	Job Change Reason:	73, Contract Completion				
Pay Effective Date	Enter as contract end date	Job Status: (Not Enterable)	Т				
		Job End Date: MM/DD/YYYY(Not Enterable)					
		Pay Effective Date: MM/DD/YYYY*					
		Personnel Date: MM/DD/YYYY					
Personnel Date	Enter as contract end date						

Field/ Step	Field Entry	Page View				
Approval Level – Top	Click on magnifying glass icon	Routing Queue				-
Row	and select the HR Advisor	Approval Level	Jser Name		Required Actio	n
Required Action	Leave as default	10 - (ADVSR) HR Advisor	HRADM8	Gunther Friends	Approve	
Approval Level –	Click on magnifying glass icon	20 - (BPO) Departmental BPO's		Monica Geller	Approve	
Second Row	and select the Dept/Faculty BPO	90 - (HR-APP) HR Apply	HRCATALOGUOIT	UOIT HRMEP	Apply	
Required Action	Leave as default	Not Selected	2		Not Selected	~
		Not Selected	2		Not Selected	~
Approval Level –	Click on magnifying glass icon	Not Selected	۲. ۲		Not Selected	~
Third Row	and select the HR Dept Approver	Save and Add New Rows	•		Interbeletete	
Required Action	Leave as default					
-						
Approval Level –	Click on magnifying glass icon					
Fourth Row	and select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New	Do not select					
Rows						



Research Associates - New Hire Salary (RS – New Hire Salary, RSNEMP)

Field/ Step	Field Entry	Page View					
ID	Enter Banner ID or use the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.					
	magnifying glass icon to search	* - indicates a required field.					
	by name	ID: * 100729839 Goomba Mushroom					
Query Date	Enter contract start date	Query Date: MM/DD/YYYY 12/02/2018					
Approval Category	Select RS – New Hire Salary,	Approval Category: * RS - New Hire Salary, RSNEMP					
	RSNEMP	Go					
Click	Go	▲ There are no active jobs based on the Query Date.					
Position	Enter position number as indicated by EPAF Summary sheet	There is a new position number and enter the suffix, or select the link under Title. ID: Goomba Mushroom, 100729839 Query Date: Dec 02, 2018 Approval Category: Research Assoc-New Hire Salary, RSNEMP					
Suffix	Enter '00' as the suffix number	Annual Paid - New Hire, GNEMP3 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select					
Select	Leave as default	Q. New Job 709993 00 Research Associate*Health 2500, Faculty of Health Sciences Image: Control of the science scie					
Click	Go	There are no active jobs based on the Query Date. All Jobs Next Approval Type Go					

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Full Employee Title	Enter the full employee title of the	
	new hire	
Sex	Copy Current Value or select from	
	dropdown	
SSN/SIN/TIN	Enter SIN	
Birth Date	Enter Birth Date	
Citizenship	Select from dropdown	
Supervisor ID	Enter the Banner ID of the	
	supervisor	
Title (30 characters)	Enter the full employee title of the	
	new hire	
Current Hire Date	Leave as default	
Pay Effective Date	Leave as default	



Personnel Date	Leave as default	Annual Paid - New Hire, 709	993-00 Resea	rch Associate*Health
Job Begin Date	Leave as default	Item Job Change Beacon: (Not Esterable)	Current Value	New Value
Annual Salary	Enter annual salary as indicated	Full Employee Title:		
	by HR Partner and Hiring	Sex: * SSN/SIN/TIN: *	Male 123456789	Not Selected V
	supervisor	Birth Date: MM/DD/YYYY*	03/03/1979	
Pay Type	Leave as default	Citizenship: * Supervisor ID: *		Y, Citizen
Contract Type	Primary	Title(30 characters): •		12/02/2018
Employee Status	Leave as default	Pay Effective Date: MM/DD/YYYY		12/02/2018
Employee Class	Leave as default	Personnel Date: MM/DD/YYYY Job Begin Date: MM/DD/YYYY		12/02/2018
Code		Annual Salary: 🔹		
District Code	Not enterable	Pay Type: Contract Type:		1 Primary V
Home COAS	Not enterable	Employee Status: (Not Enterable) Employee Class Code: (Not Enterable	:)	A
Home Org	Not enterable	District Code: (Not Enterable)		OIT
Factor	Not enterable	Home Organization: (Not Enterable)		3700
Pays	Not enterable	Factor: (Not Enterable) Pays: (Not Enterable)		26
Step	Leave as default	Step:		

Field/ Step	Field Entry	Page View											
Effective Date	Leave as default (same as query date)	Curre Effect COA I	nt tive Date: I Index Fund	12/02/2018 Organizatio	n Account Progr	am Activity I	Location Proje	ct Cost Perce	nt Encumbrai	ice Override	e End Dat	e	
COA	Leave as default	New	-										
Fund	Defaults to type of position and	Effect	ive Date: MI Index	Fund	2/02/2018 Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
	faculty	QU		Q 100000	2500	Q 62124	Q 10	Q				100.00	
Organization	Defaults to type of position and												
	faculty/dept	٩,				Q.		٩					
Account	Defaults to type of position and	Q		Q	Q	_Q	Q	Q			Total:		
	faculty/dept										rotun	100.00)
Program	Defaults to type of position and	✓	ult fan an Ta da	. Cause and	Add Naw Dawa								
_	faculty/dept. NOTE: When doing	Dela	ait from filde.	Save and a	add New Rows								
	mass uploads, leave the Program												
	code blank												
Activity	Leave as default unless BPO												
	recommends otherwise												
Location	Leave as default												
Project	Leave as default												



Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End Date	
Default from Index	Do not select
and Save and Add	
New Rows	

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default		
Job Status	Not enterable	Enter Job END Information, 7099	93-00 Research Associate*Health
Job End Date	Not enterable	Item	Current Value New Value
Pay Effective Date	Enter as contract end date	Job Change Reason: (Not Enterable)	72
		Job Status: (Not Enterable)	Т
		Job End Date: MM/DD/YYYY(Not Enterable	
		Pay Effective Date: MM/DD/YYYY	
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY	

Field/ Step	Field Entry	Page View				
Approval Level –	Click on magnifying glass icon and	Routing Queue				
Top Row	select the HR Advisor	Approval Level User Name	Required Action			
Required Action	Leave as default	10 - (ADVSR) HR Advisor Q HRADM8 Gunther Friends	Approve			
Approval Loval	Click on magnifying glass icon and	20 - (BPO) Departmental BPO's HRADM9 Monica Geller	Approve			
Appioval Level –	Click on magninging glass icon and	50 - (HR) HR Department S0 - (HR) HR Department Fun Bobby	Approve			
Second Row	select the Dept/Faculty BPO	90 - (HR-APP) HR Apply	Apply			
Poquired Action	Loovo as dofault	Not Selected	Not Selected			
Required Action	Leave as delault	Not Selected	Not Selected			
A management of the second		Not Selected V Q	Not Selected			
Approval Level –	Click on magnifying glass icon and	Not Selected V Q	Not Selected			
Third Row	select the HR Department	Save and Add New Rows				
	Approver					
Required Action	Leave as default					
Approval Level –	Click on magnifying glass icon and					
Fourth Dow						
FOULTI ROW						
Required Action	Leave as default					



Save and Add New	Do not select	
Rows		

Research Associates - New Hire Hourly (RS – New Hire Hourly, RSNEEH)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search by	* - indicates a required field.
	name	ID: * 100729840 King Boo
Query Date	Enter contract start date	Query Date: MM/DD/YYYY 12/02/0018
Approval Category	Select RS – New Hire Hourly,	Approval Category: * RS - New Hire Hourly, RSNEEH
	RSNEEH	Go
Click	Go	⚠ There are no active jobs based on the Query Date.
		All Jobs
Position	Enter position number as indicated	Renter or search for a new position number and enter the suffix, or select the link under Title.
	by EPAF Summary sheet	ID: King Boo, 100729840 Ouery Date: Dec 03, 2018
Suffix	Enter '00' as the suffix number	Approval Category: Research Assoc - New Hire Hrly, RSNEEH
		Hourly Paid - New Hire, GNEMPH
Select	Leave as default	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Q New Job 700007 00 Research Associate*Health 2500. Faculty of Health Sciences Select
		• · · · · · · · · · · · · · · · · · · ·
Click	Go	▲ There are no active jobs based on the Query Date.
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Full Employee Title	Enter the full employee title of the	
	new hire	
Sex	Copy Current Value or select from	
	dropdown	
SSN/SIN/TIN	Enter SIN	
Birth Date	Enter Birth Date	
Citizenship	Select from dropdown	
Supervisor ID	Enter the Banner ID of the	
	supervisor the employee will	
	directly report to	



Title (30 characters)	Enter the full employee title of the			
	new hire	Hourly Paid - New Hire	e, 7U9987-00 Resea	rch Associate*Health
Current Hire Date	Leave as default	Thom	Current Value	Now Value
Pay Effective Date	Leave as default	Job Change Reason: (Not Er	iterable)	72
Personnel Date	Leave as default	Full Employee Title:		
Job Begin Date	Leave as default	Sex: \star	Male	Not Selected V
Pay Type	Leave as default	SSN/SIN/TIN: *	123456789	
Hourly Rate	Enter hourly rate in accordance	Birth Date: MM/DD/YYYY*	04/01/1900	
-	with compensation structure and	Supervisor ID: *		Not Selected
	collective agreements concerning	Title(30 characters): *		
	position	Current Hire Date: MM/DD/Y	(YYY <mark>*</mark>	12/03/2018
Hours per Pay (2	Enter hours in accordance with	Pay Effective Date: MM/DD/	YYYY <mark>*</mark>	12/03/2018
wks)	compensation structure and	Personnel Date: MM/DD/YYY	Y <mark>*</mark>	12/03/2018
	collective agreements concerning	Job Begin Date: MM/DD/YYY	Y <mark>*</mark>	12/03/2018
	position	Pay Type: (Not Enterable)		HRLY
Contract Type	Select Primary	Hourry Rate. * Hours per Pay(2 wks):		40
Timesheet Orgn	Click on the magnifying glass icon	Contract Type:		Primary V
	and select the code for your	Timesheet Orgn: 🖌		
	faculty/dept. IF you are not sure of	Employee Status: (Not Enter	rable)	A
	the Org. please email	Employee Class Code: (Not	Enterable)	7H
	Financesystems@uoit.ca	District Code: *(Not Enterab	ole)	ΤΙΟ
Employee Status	Not enterable	Home COAS: *(Not Enterable	ie) Interable)	
Employee Class	Not enterable		interable)	3700
Code				
District Code	Not enterable			
Home COAS	Not enterable			
Home Organization	Not enterable			

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query	
	date)	
COA	Leave as default	
Fund	Defaults to type of position and	
	faculty	



Organization	Defaults to type of position and												
Account	Defaults to type of position and faculty/dept												
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	Current Effectiv COA In New Effective	t ve Date: 12 dex Fund (e Date: MM,	2/03/2018 Drganization /DD/YYYY 12/	Account Progra	am Activity L	ocation Projec	ct Cost Percer	nt Encumbran	nce Override	: End Dat	e	
Activity	Leave as default unless BPO recommends otherwise		Index	Fund Q 100000 Q	Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Override End Da
Location	Leave as default												
Cost	Leave as default										Total:	100.00	
Percent Encumbrance	Leave as default Leave as default	✓ Default	from Index	Save and Ac	d New Rows								
Default from Index and Save and Add New Rows	Do not select												

Field/ Step	Field Entry	Page View			
Job Change	Leave as default	Enter Job END Information, 7U9987-00 Research Associate*Health			
Reason		Itom	Current Value New Value		
Job End Date	Not enterable	Job Change Reason: (Not Enterable)			
Pay Effective	Enter as contract end date	Job End Date: MM/DD/YYYY(Not Enterable	e)		
Date		Pay Effective Date: MM/DD/YYYY			
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY*			
		Job Status: (Not Enterable)	Т		
Job Status	Leave as default				

Field/ Step	Field Entry	Page View
Approval Level –	Click on magnifying glass icon and	
Top Row	select the HR Advisor	
Required Action	Leave as default	



Approval Level – Second Row	Click on magnifying glass icon and select the Dept/Faculty BPO				
Required Action	Leave as default	Routing Queue			
Ammunallayel	Oliale an manufituing glass is an and	Approval Level	User Name		Required Action
Approval Level –	Click on magnifying glass icon and	10 - (ADVSR) HR Advisor	RADM8	Gunther Friends	Approve
Third Row	select the HR Department Approver	20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve
Pequired Action	Loavo as dofault	50 - (HR) HR Department	RADM6	Fun Bobby	Approve
Required Action	Leave as delault	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
		Not Selected	✓ Q,		Not Selected
Approval Level –	Click on magnifying glass icon and	Not Selected	▼ Q		Not Selected
Fourth Row	select HRCATALOGUOIT	Not Selected	✓ Q.		Not Selected V
1 out it itow		Not Selected	✓ Q		Not Selected
Required Action	Leave as default	Save and Add New Rows			
Save and Add	Do not select				
New Rows					

Research Associates – Change Job Salary (RS – Job Info Change Salary, RSCJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search by	* - indicates a required field.
	name	ID: * 100729839 Goomba Mushroom Q
Query Date	Enter effective date to reflect when	Query Date: MM/DD/YYYY* 12/15/2018
	the salary of the contract changed	Approval Category: * RS - Job Info Change Salary, RSCJOB
Approval Category	Select RS – Job Info Change Job	Go
	Salary RSCJOB	Employee Job Assignments
Click	Go	Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 7U9993 00 Research Associate Lvl I 3700, Human Resources Dec 02, 2018 Dec 31, 2018 Active
		Active Jobs
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title.
Suffix	Leave as default	ID: Goomba Mushroom, 100729839 Query Date: Dec 15, 2018
		Approval Category: Research Assoc -Chg Job Salary, RSCJOB
Select	Select position which requires an	AT/PM - Change Job Data, GCJOB2
	info change	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Select Q New Job
Click	Go	
		Primary 709993 00 Research Associate Lvi I 3700, Human Resources Dec 02, 2018 Dec 31, 2018 Active
		All Jobs
		Next Approval Type Go



Field/ Step	Field Entry
Job Change	Select correct change reason from
Reason	dropdown
Pay Effective Date	Leave as default
Personnel Date	Leave as default
Annual Salary	Enter revised amount
Pay Type	Leave as default
Supervisor ID	Supervisor's Banner ID
Title (30	Enter Title from current value
Characters)	column
Hourly Rate	Leave as default
Job Status	Leave as default
Factor	Not enterable
Pays	Not enterable

Page View

AT/PM - Change Job Data, 7U9993-00 Research Associate Lvl I

Item	Current Value	New Value
Job Change Reason: 🜟	72	Not Selected
Pay Effective Date: MM/DD/YYYY	12/02/2018	12/15/2018
Personnel Date: MM/DD/YYYY	12/02/2018	12/15/2018
Annual Salary:	54000	
Рау Туре:	1	1
Supervisor ID:	100729834	
Title(30 characters):	Research Associate Lvl I	
Hourly Rate:	29.67033	
Job Status:	Active	Active
Factor: (Not Enterable)	26	26
Pays: (Not Enterable)	26	26

Field/ Step	Field Entry	Page View								
Effective Date	Leave as default (same as query date)	Current Effective Date: 12/02/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date								
COA	Leave as default	U 100000 2500 62124 10 100.00								
Fund	Defaults to type of position and faculty	New								
Organization	Defaults to type of position and	Effective Date: MM/DD/YYYY 12/15/2018								
-	faculty/dept	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date Q U Q 100000 Q 2500 Q 62124 Q 10 100.00								
Account	Defaults to type of position and									
	faculty/dept									
Program	Defaults to type of position and									
	faculty/dept. NOTE: When doing	Total: 100.00								
	mass uploads, leave the Program	Solution of the second								
	code blank	Default from Index Save and Add New Rows								
Activity	Leave as default unless BPO									
	recommends otherwise									
Location	Leave as default									
Project	Leave as default									
Cost	Leave as default									
Percent	Leave as default									



Encumbrance	Leave as default	
Override End		
Date		
Default from	Do not select	
Index and Save		
and Add New		
Rows		

Field/ Step	Field Entry	Page View						
Job Change	Leave as default	Enter Job END Information 7110	002 00 Boco	arch Accociate Lvl I				
Reason		Enter Job END Information, 709993-00 Research Associate LVI I						
Job Status	Not enterable	Item	Item Current Value New Value					
Job End Date	Not enterable	Job Change Reason: (Not Enterable)	72	72				
Pay Effective	Enter as job end date from current	Job Status: (Not Enterable)	Active	Т				
Date	value column	Job End Date: MM/DD/YYYY(Not Enterable	e) 12/31/2018					
Personnel Date	Enter as job and date from current	Pay Effective Date: MM/DD/YYYY*	12/02/2018					
	value column	Personnel Date: MM/DD/YYYY	12/02/2018					

Field/ Step	Field Entry		Page	e View	
Approval Level –	Click on magnifying glass icon and	Routing Queue			_
Тор ком	Select the HR Advisor	Approval Level	User Name	-	Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor	RADM9	Monica Geller	Approve
Approval Level -	Click on magnifying glass icon and	20 - (BPO) Departmental BPO's	HRADM6	Fun Bobby	Approve
Capard David	coloct the Dept/Ecoulty DDO	50 - (HR) HR Department	HRADM9	Monica Geller	Approve
Second Row	select the Dept/Faculty BPO	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
Required Action	Leave as default	Not Selected 🗸 🗸	Q,		Not Selected V
		Not Selected 🗸 🗸	Q		Not Selected V
Approval Level –	Click on magnifying glass icon and	Not Selected	Q		Not Selected
Third Row	select the HR Department Approver	Not Selected	Q		Not Selected
Poquired Action	Loovo as dofault	Save and Add New Rows			
Required Action	Leave as default				
Approval Loval	Click on magnifying gloop joon and				
Approvar Lever –	Click on magnifying glass icon and				
Fourth Row	select HRCATALOGUOIT				
Required Action	Leave as default				



Save and Add	Do not select	
New Rows		

Research Associate – Change Job Hourly (RS – Job Info Change Hourly, RSCJBH)

Field/ Step	Field Entry	Page View							
ID	Enter Banner ID or use the magnifying	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.							
	glass icon to search by name	* - indicates a required field.							
Query Date	Enter contract start date	ID: * 100729840 King Boo							
Approval	Select RS – Job Info Change Hourly,	Query Date: MM/DD/YYYY* 12/21/2018							
Category	RSCJBH	Approval Category: * RS - Job Into Change Hourly, RSCJBH							
Click	Go								
		Employee Job Assignments Type PositionSuffixTitle Time Sheet OrganizationStart Date End Date Last Paid DateStatus							
		Primary 709987 00 Research Associate LvI II 2502, FHS - Med Lab Dec 03, 2018 Dec 31, 2018 Active							
Position	Leave as default	King Boo 100229840							
Suffix	Leave as default	Query Date: Dec 21, 2018 Approval Category: Research Assoc - Cha Job Hrlv. RSCJBH							
Select	Select the correct position to be changed	AT/PM - Change Job Data Hourly, GCJOBH Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select							
Click	Go	Primary 7U9987 00 Research Associate LvI II 2502, FHS - Med Lab Dec 03, 2018 Dec 31, 2018 Active All Jobs							

Field/ Step	Field Entry	Page View
Job Change Reason	Select as appropriate to	
	circumstances of change	
Full Employee Title	Enter the full employee title	
	of the new hire	
Pay Effective Date	Leave as default	
Personnel Date	Leave as default	
Рау Туре	Not enterable	
Hourly Rate	Enter hourly rate in	
	accordance with	
	compensation structure and	



Hours per Pay (2	collective agreements concerning position		Usurk, 70007.00 P	
wks)	with compensation structure	AT/PM - Change Job Data	Hourly, 709987-00 R	esearch Associate LVI II
	and collective agreements	Item	Current Value	New Value
	concerning position	Job Change Reason: * Full Employee Title:	72	Not Selected
Supervisor ID	Enter the Banner ID of the	Pay Effective Date: MM/DD/YYYY	12/03/2018	12/21/2018
	supervisor	Personnel Date: MM/DD/YYYY*	12/03/2018	12/21/2018
Title (30 characters)	Enter the full employee title	Pay Type: (Not Enterable)	HRLY	HRLY
	of the new hire	Hourly Rate:	32.5	
Timesheet Orgn	Click on the magnifying glass	Hours per Pay(2 wks):	40	
	icon and select the code for	Supervisor ID:	100729834	
	your faculty/dept. IF you are	Title(30 characters):	Research Associate Lvl II	
	not sure of the Org. please	Timesheet Orgn:	2502	
	email	Job Status: (Not Enterable)	Active	A
	Financesystems@uoit.ca			
Job Status	Leave as default			

Field/ Step	Field Entry	Page View											
Effective Date	Leave as default (same as query date)	Current Effective Date: 12/03/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date											
COA	Leave as default	U	10000	JU 2500	62124 10			100	0.00				
Fund	Defaults to type of position and faculty	New Effecti	ve Date: MN	4/DD/YYYY 12/	21/2018								
Organization	Defaults to type of position and		Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
	faculty/dept	Q		Q	Q	Q							
Account	Defaults to type of position and												
	faculty/dept	Q		_ Q	Q	Q.							
Program	Defaults to type of position and										Total:	100.00)
	faculty/dept. NOTE: When doing	🕑 Def	aulting valu	es for Labor Dis	stribution from t	he Job record	ls.						
	mass uploads, leave the Program	Defau	lt from Inde	Save and Ad	ld New Rows								
	code blank												
Activity	Leave as default unless BPO												
	recommends otherwise												
Location	Leave as default												



Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End Date	
Default from Index	Do not select
and Save and Add	
New Rows	

Field Entry	Page View				
Leave as default	Enter Job END Information, 7110087, 00 Research Associate Lv/ II				
Not enterable		507-00 1(6366			
Not enterable	Item	Current Value	e New Value		
Enter as contract end date	Job Change Reason: (Not Enterable)	72	73		
	Job End Date: MM/DD/YYYY(Not Enterable	e) 12/31/2018			
	Pay Effective Date: MM/DD/YYYY*	12/03/2018			
<u> </u>	Personnel Date: MM/DD/YYYY	12/03/2018			
Enter as contract end date	Job Status: (Not Enterable)	Active	Т		
	Field EntryLeave as defaultNot enterableNot enterableEnter as contract end dateEnter as contract end date	Field Entry Leave as default Enter Job END Information, 7U9 Not enterable Item Not enterable Job Change Reason: (Not Enterable) Information, 7U9 Job Status: (Not Enterable)	Field EntryPageLeave as defaultEnter Job END Information, 7U9987-00 ReseatNot enterableItemNot enterableJob Change Reason: (Not Enterable)Enter as contract end dateJob Change Reason: (Not Enterable)Inter as contract end datePageEnter as contract end datePageEnter as contract end dateJob Change Reason: (Not Enterable)Inter as contract end datePageEnter as contract end datePageInter as contr		

Field/ Step	Field Entry			Page View	
Approval Level – Top	Click on magnifying glass icon	Routing Queue			
Row	and select the HR Advisor	Approval Level	User Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor		Gunther Friends	Approve
Approval Level –	Click on magnifying glass icon	20 - (BPO) Departmental BPO's		Fun Bobby	Approve
Second Row	and select the Dept/Faculty BPO	90 - (HR-APP) HR Apply	Q HRCATALOGUOIT	UOIT HRMEP	Apply
Required Action	Leave as default	Not Selected	✓ Q		Not Selected V
		Not Selected			Not Selected
Approval Level –	Click on magnifying glass icon	Not Selected			Not Selected
Third Row	and select the HR Approver	Save and Add New Rows	•		Not Selected
Required Action	Leave as default	Save and Add New Rows			
Approval Level –	Click on magnifying glass icon				
Fourth Row	and select HRCATALOGUOIT				
Required Action	Leave as default				



Save and Add New	Do not select	
Rows		

Research Associates - Terminate Job (RS – Terminate Job, RSTERM)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	The select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to searc	h * - indicates a required field.
	by name	ID: * 100729839 Goomba Mushroom
Query Date	Enter the new end date of the	Query Date: MM/DD/YYYY* 12/21/2018
, ,	change in	Approval Category: * RS - Terminate Job, RSTERM
Approval Category	Select RS – Terminate Job,	Go
	RSTERM	Employee Job Assignments
Click	Go	Type Position Suffix Time Sheet Organization Start Date End Date Last Paid Date Status Primary 7U9993 00 Research Associate Lyl I3700. Human Resources Dec 02, 2018 Dec 31, 2018 Active
		All Jobs
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title.
		ID: Goomba Mushroom, 100729839 Query Date: Dec 21, 2018
Suffix	Leave as default	Approval Category: Research Assoc - Terminate Job, RSTERM
		Enter Job End Date for Pay Effective Date, GETRM SearchType Position SuffixTitle Time Sheet OrganizationStart Date End Date Last Paid DateStatusSelect
Select	Select the appropriate position	n to
	be terminated	Primary 7U9993 00 Research Associate Lvl 1 3700, Human Resources Dec 02, 2018 Dec 31, 2018 Active
Click	Go	All Jobs
		Next Approval Type Go
Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	Enter Job End Date for Pay Effective Date, 7U9993-00 Research Associate Lvl I
Job End Date	Enter data from current	Item Current Value New Value
	value column	Job End Date: MM/DD/YYYY 12/31/2018
Pay Effective Date	Enter as Job End Date for	Pay Effective Date: MM/DD/YYYY* 12/02/2018
	current value column	Annual Salary: 54000
Annual Salary	Leave as default	Enter New Contract End Date, 7U9993-00 Research Associate Lvl I
Job Change Reason	Indicate the change reason	Item Current Value New Value
_	by selecting the appropriate	Job Change Reason: *(Not Enterable) 72 ETND
	dropdown option	Pay Effective Date: MM/DD/YYYY 12/02/2018 12/21/2018 Personnel Date: MM/DD/YYYY 12/02/2018 12/21/2018
Pay Effective Date	Enter as query date	Job Status: *(Not Enterable) Active L
Personnel Date	Enter as query date	

123



Job Status	Not enterable
nnual Salary	Leave as default

Field/ Step	Field Entry		Pag	e View	
Approval Level	Click on magnifying glass icon	Routing Queue			-
– Top Row	and select the HR Advisor	Approval Level	liser Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor	Q HRADM9	Monica Geller	Approve
Approval Level	Click on magnifying glass icon	20 - (BPO) Departmental BPO's	RADM29	Chandler Bing	Approve
- Second Row	and select BPO	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
		Not Selected	✓ Q		Not Selected V
Required Action	Leave as default	Not Selected	✓ Q.		Not Selected V
		Not Selected	✓ Q		Not Selected V
Approval Level	Click on magnifying glass icon	Not Selected	✓ Q		Not Selected V
– Third Row	and select HRCATALOGUOIT	Save and Add New Rows			
Required Action	Leave as default				
Save and Add	Do not select				
New Rows					

Research Associates – Rehire Salary (RS – Rehire Salary, RSXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	The Part of the Second
	glass icon to search by name	
Query Date	Enter contract start date	
Approval	Select RS – Rehire Salary, RSXEMP	Query Date: MM/DD/YYYY* 01/02/2019 Approval Category: * RS - Rehire Salary, RSXEMP
Category		Go
Click	Go	Employee Job Assignments Time Sheet Organization Start Date End Date Last Paid Date Status Primary 709993 00 Research Associate Lvl I 3700, Human Resources Dec 02, 2018 Dec 31, 2018 Active
Position	Enter position number as indicated by EPAF Summary sheet	
Suffix	Enter '01' as the suffix number if it has	
	the same position number. If however	
	the position number is different, the suffix can be '00' again.	



Select Click	Leave as default Go	
		Annual Pails - Renne, GKENPY - Research Associate*Health 2500, Faculty of Health Sciences Start Date End Date Last Paid Date Status Select

Field/ Step	Field Entry		Pag	je View
Job Change	Leave as default	Annual Paid - Rehire, 7U9993	3-01 Research Associate*	Health
Reason		Item	Current Value	New Value
Full Employee Title	Enter the full rehire's employee title	Job Change Reason: *(Not Enterable))	72
Supervisor ID	Enter the Banner ID of the	Full Employee Title:		
	supervisor the employee will	Supervisor ID: *		
	directly report to	Current Hire Date: MM/DD/YYYY	12/02/2018	01/02/2019
Title (30	Enter the full rehire's employee title	Pay Effective Date: MM/DD/YYYY		01/02/2019
Characters)		Personnel Date: MM/DD/YYYY		01/02/2019
Current Hire Date	Leave as default	Job Begin Date: MM/DD/YYYY*		01/02/2019
Pay Effective Date	Leave as default	Pav Type:		1
Personnel Date	Leave as default	Contract Type: (Not Enterable)		S
Job Begin Date	Leave as default	Employee Status: (Not Enterable)	Active	A
Annual Salary	Enter annual salary as indicated by	Employee Class Code: *	7U, Research Associate Salary (
	HR Partner and Hiring supervisor	Home COAS: (Not Enterable)	U	
Pay Type	Leave as default	Home Organization: (Not Enterable)	3700, Human Resources	3700
Contract Type	Leave as default	Factor:		26
Employee Status	Non enterable	Pays:		26
Employee Class	Enter as 7U			
Code				
Step	Not enterable			
Home COAS	Not enterable			
Home Org	Not enterable			
Factor	Not enterable			
Pays	Not enterable			



Field/ Step	Field Entry	Page View	
Effective Date	Leave as default (same as query date)	Current Effective Date: 01/02/2019 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
COA	Leave as default	New	
Fund	Defaults to type of position and	Effective Date: MM/DD/YYYY 01/02/2019 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End	Date
	faculty		
Organization	Defaults to type of position and		
	faculty/dept		
Account	Defaults to type of position and		
	faculty/dept	100.00	
Program	Defaults to type of position and	Default from Index Save and Add New Rows	
	faculty/dept. NOTE: When doing		
	mass uploads, leave the Program		
	code blank		
Activity	Leave as default unless BPO		
	recommends otherwise	-	
Location	Leave as default		
Project	Leave as default		
Cost	Leave as default		
Percent	Leave as default		
Encumbrance	Leave as default		
Override End Date			
Default from Index	Do not select		
and Save and Add			
New Rows			

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Job Status	Not enterable	
Job End Date	Not enterable	
Pay Effective Date	Enter as contract end date	
Personnel Date	Enter as contract end date	



Field/ Step	Field Entry		P	age View		
Approval Level – Top	Click on magnifying glass	Routing Queue				
Row icon and select the correct	Approval Level	User Name		Required Action	on	
	HR Advisor from the	10 - (ADVSR) HR Advisor	RADM8	Gunther Friends	Approve	
	drondown	20 - (BPO) Departmental BPO's	RADM9	Monica Geller	Approve	
		50 - (HR) HR Department	RADM6	Fun Bobby	Approve	
Required Action	Leave as default	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
Approval Level – Second	Click on magnifying glass	Not Selected V	Q,		Not Selected	~
Pow	icon and salect the correct	Not Selected V	Q,		Not Selected	~
RUW		Not Selected V	۹,		Not Selected	~
	HR Dept/Faculty BPO from	Not Selected	٩,		Not Selected	~
	the dropdown	Save and Add New Rows				
Approval Level – Third Row, Leftmost column	Click on magnifying glass icon and select the correct HR Department Approver from the dropdown					
Required Action	Leave as default					
Approval Level – Fourth Row, Leftmost column	Click on magnifying glass icon and select the HRMEP, UOIT (HRCATALOGUOIT) from the dropdown					
Required Action	Leave as default					
Save and Add New Rows	Do not select					

Research Associates – Rehire Hourly (RS – Rehire Hourly, RSXEEH)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	
	glass icon to search by name	
Query Date	Enter contract start date	
Approval	Select RS – Rehire Hourly, RSXEEH	
Category		



A 11 1		
Click	Go	Tenter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
		* - indicates a required field.
		ID: * 100729840 King Boo Q
		Query Date: MM/DD/YYYY* 01/02/2019
		Approval Category: * RS - Rehire Hourly, RSXEEH
		Go
		Employee Job Assignments
		Type PositionSuffix Title Time Sheet OrganizationStart Date End Date Last Paid DateStatus
		Primary/7U9987 00 Research Associate LvI II[2502, FHS - Med Lab Dec 03, 2018 Active
		All Jobs
Position	Enter position number as indicated by	Riter or search for a new position number and enter the suffix, or select the link under Title.
	EDAE Summary choot	TD: King Rog. 100729840
	EFAF Summary Sheel	Ouerv Date: lan 02. 2019
Suffix	Enter '01' as the suffix number	Approval Category: Research Assoc - Rehire Hourly, RSXEEH
Coloct		Hourly Paid - Rehire, GXEMPH
Select	Leave as delault	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
		New Job 709987 01 Research Associate*Health 2500, Faculty of Health Sciences
Click	Go	
Cherk		▲ There are no active jobs based on the Query Date.
		All Jobs
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Full Employee	Enter the full employee title of the new	
Title	hire	
Supervisor ID	Enter the Banner ID of the supervisor	
Title (30	Enter the full title of the new hire	
characters)		
Current Hire	Leave as default	
Date		
Pay Effective	Leave as default	
Date		
Personnel Date	Leave as default	
Job Begin Date	Leave as default	
Pay Type	Not enterable	



Hourly Rate	Enter hourly rate in accordance with compensation structure and collective agreements concerning position	Hourly Paid - Rehire, 7U9987	7-01 Research Associate*I	Health
Hours per Pay (2 wks) <u>Contract Type</u> Timesheet Orgn	Enter hours in accordance with compensation structure and collective agreements concerning position Leave as default Click on the magnifying glass icon and select the code for your faculty/dept. IF you are not sure of the Org. please	Item Job Change Reason: (Not Enterable) Full Employee Title: Supervisor ID: * Title(30 characters): * Current Hire Date: MM/DD/YYYY* Pay Effective Date: MM/DD/YYYY* Personnel Date: MM/DD/YYYY*	Current Value No 12/03/2018	ew Value 72
Employee Status	email Financesystems@uoit.ca Not enterable	Pay Type: *(Not Enterable) Hourly Rate: * Hours per Pay(2 wks):		HRLY 40
Employee Class Code	Enter 7H	Contract Type: Timesheet Orgn: * Employee Status: (Not Enterable)	Q	Secondary A
Home COAS Home Organization	Not enterable Enter or click on magnifying glass icon and select the correct home organization code for faculty/dept.	Employee Class Code: * Home COAS: (Not Enterable) Home Organization: (Not Enterable) Step: (Not Enterable)	7H, Research Associate Hourly Q U 3700, Human Resources	U 3700 0
Step	Not enterable			

Field/ Step	Field Entry	Page View											
Effective Date	Leave as default (same as query date)	Current											
COA	Leave as default	COA In	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date										
Fund	Defaults to type of position and faculty	New											
Organization	Defaults to type of position and	Effectiv	ve Date: MM	/DD/YYYY 01/0	02/2019	Account	Drogram	Activity	Location	Project	Cost	Dercent	Encumbrance Override End Date
-	faculty/dept	QU		Q 100000	Q 2500	Q 62124	Q 10					100.00	
Account	Defaults to type of position and												
	faculty/dept	Q		Q	Q	Q							
Program	Defaults to type of position and	٩		Q	Q	Q	Q.	Q.			Totali		
0	faculty/dept. NOTE: When doing mass										TOLAI	100.00	
	uploads, leave the Program code	S											
	blank	Defau	It from Index	Save and Add	d New Rows								



Activity	Leave as default unless BPO
-	recommends otherwise
Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End	
Date	
Default from	Do not select
Index and Save	
and Add New	
Rows	

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default		
Job End Date	Not enterable	Enter Job END Information, 7099	987-01 Research Associate*Health
Pay Effective Date	Enter as contract end date	Item Job Change Reason: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enterable Pay Effective Date: MM/DD/YYYY _*	Current Value New Value 73)
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY * Job Status: (Not Enterable)	T
Job Status	Not enterable		

Field/ Step	Field Entry			Page View	
Approval Level –	Click on magnifying glass icon and	Routing Queue			
Top Row	select the HR Advisor	Approval Level	User Name		Required Action
Required Action	Leave as default	10 - (ADVSR) HR Advisor		Gunther Friends	Approve
Approval Level –	Click on magnifying glass icon and	50 - (HR) HR Department	Q HRADM6	Fun Bobby	Approve
Second Row,	select the Dept/Faculty BPO	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply Not Selected
Required Action	Leave as default	Not Selected	v Q		Not Selected
		Not Selected	✓ Q.		Not Selected V
Approval Level – Third Row	Click on magnifying glass icon and select the HR Dept Approver	Not Selected Save and Add New Rows	_v d		Not Selected Y



Required Action	Leave as default
Approval Level – Fourth Row	Click on magnifying glass icon and select the HRCATALOGUOIT
Required Action	Leave as default
Save and Add New	Do not select
Rows	

Additional Qualifications – New Hire (AQ - New Hire, AQNEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying glass to search by name	 Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. • - Indicates a required field. ID: * 100729842 Leap Frog
Query Date	Enter contract start date	Query Date: MM/DD/TTTT* 12/03/2018 Approval Category: * AQ - New Hire, AQNEMP
Approval Category	Select AQ – New Hire, AQNEMP	Go
Click	Go	All Jobs
Position	Enter position number as indicated by EPAF Summary sheet	
Suffix	Enter '00' as the suffix number	Approval Category: AQ - New Employee Hire, AQNEMP AQ - New Hire, AQNEE2
Select	Leave as default	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Q New Job 401953 00 AQ Instructor*Fac of Ed 2400, Faculty of Education Image: Comparison of Education
Click	Go	A There are no active jobs based on the Query Date. All Jobs Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Sex	Copy Current Value or select from dropdown	
SSN/SIN/TIN	Enter SIN	
Birth Date	Enter Birth Date	



Citizenship	Select from dropdown
Current Hire Date	Leave as default
Pay Effective Date	Leave as default
Personnel Date	Leave as default
Job Begin Date	Leave as default
Annual Salary	Enter annual salary as indicated by HR Partner and Hiring supervisor
CRN/Course Code	
Pay Type	Leave as default
Contract Type	Select Primary
Employee Status	Leave as default
Employee Class Code	Leave as default
District Code	Not enterable
Home COAS	Not enterable
Home Org	Not enterable
Factor	Not enterable
Pays	Not enterable

AQ - New Hire, 4UI953-00 AQ Instructor*Fac of Ed

	o		
Item	Current Valu	е ме	ew value
Job Change Reason: 🖌			72, Contract Position
Sex: *	Male		Not Selected V
SSN/SIN/TIN: \star	123456789		
Birth Date: MM/DD/YYYY	01/01/1991		
Citizenship: 🜟			Not Selected
Current Hire Date: MM/DD/YYYY			12/03/2018
Pay Effective Date: MM/DD/YYYY	¢		12/03/2018
Personnel Date: MM/DD/YYYY			12/03/2018
Job Begin Date: MM/DD/YYYY			12/03/2018
Annual Salary: 🐅			
CRN/Course Code: *			
Pay Type:			1
Contract Type:			Primary 💙
Employee Status:			Active 🗸
Employee Class Code:		Q	7U
District Code: \star			OIT, U. of Ont. Institute of Tech.
Home COAS:		Q	U
Home Organization:		Q	3700
Factor: (Not Enterable)			1
Pays: (Not Enterable)			1

Field/ Step	Field Entry						Р	age Vie	ew				
Effective Date	Leave as default (same as query date)	Current Effective Date: 12/03/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date											
COA	Leave as default	New											
Fund	Defaults to type of position and	Effecti	ve Date: MM	/DD/YYYY 12/0	03/2018	Account	Drogram	Activity	Location	Project	Cost	Porcont	Encumbrance Override End Date
	faculty	QU	Index	Q 130020	Q 2400	Q 62000	Q 10		Location	Figet		100.00	
Organization	Defaults to type of position and												
0	faculty/dept	Q			Q	Q							
Account	Defaults to type of position and	Q		Q	Q	Q.	Q	Q			Total		
	faculty/dept										rotan	100.00	
Program	Defaults to type of position and	S											
C C	faculty/dept. NOTE: When doing	Defau	ilt from Index	Save and Add	New Rows								
	mass uploads, leave the Program												
	code blank												



Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance	Leave as default	
Override End Date		
Default from Index	Do not select	
and Save and Add		
New Rows		

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default		
Job Status	Not enterable	Enter Job END Information, 4UI9	53-00 AQ Instructor*Fac of Ed
Job End Date	Not enterable	Item	Current Value New Value
Pay Effective Date	Enter as contract end date	Job Change Reason:	73, Contract Completion
Personnel Date	Enter as contract end date	Job Status: (Not Enterable) Job End Date: MM/DD/YYYY(Not Enterable Pay Effective Date: MM/DD/YYYY Personnel Date: MM/DD/YYYY) []

Field/ Step	Field Entry			Page View	
Approval Level – First Row	Click on magnifying glass and select the Dept/Faculty BPO	Routing Queue			
Required Action	Leave as default	Approval Level	User Name	1	Required Action
		20 - (BPO) Departmental BPO's		Phoebe Ruffay	Approve
Approval Level –	Click on magnifying glass and	90 - (HR-APP) HR Apply	RCATALOGUOIT ×	UOIT HRMEP	Apply
Second Row	select the HR Dept Approver	Not Selected	٩		Not Selected
Poquired Action	Loavo as dofault	Not Selected	۵ <u>.</u>		Not Selected
Required Action		Not Selected	مر مر]	Not Selected
Approval Level –	Click on magnifying glass and	Save and Add New Rows			
Third Row	select the HRCATALOGUOIT				



Required Action	quired Action Leave as default
Save and Add New Rows	ve and Add New Do not select

Additional Qualifications – Change Job (AQ – Job Info Change AQCJOB)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Reference of the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search by	* - indicates a required field.
	name	ID: * 100729842 Leap Frog Q
Query Date	Enter effective date of the change	Query Date: MM/DD/YYYY* 01/07/2019
Approval Category	Select AQ– Job Info Change,	Approval Category: * AQ - Job Info Change, AQCJOB
	AQCJOB	Go
Click	Go	
		Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status
		Primary 4UI953 00 AQ Instructor*Fac of Ed 3700, Human Resources Dec 01, 2018 Jan 25, 2019 Active
		All Jobs
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title.
		ID: Leap Frog, 100729842 Ouery Date: Jan 07, 2019
Suffix	Leave as default	Approval Category: AQ - Job Info Change, AQCJOB
		AQ - Chg Job Data, AQCJB2
Select	Select the appropriate position to	Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
	change	
Click	Go	Primary 4UI953 00 AQ Instructor*Fac of Ed 3700, Human Resources Dec 01, 2018 Jan 25, 2019 Active
		All Jobs
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Indicate the change reason by	
	selecting the appropriate	
	dropdown	
Pay Effective Date	Enter data from current value	
-	column	



Personnel Date	Enter data from current value
	column
Annual Salary	Enter as specified
CRN/Course Code	Enter from current value column
Contract Type	Enter input from current value
	column
Job Status	Leave as default
Factor	Not enterable
Pays	Not enterable

— AQ - Chg Job Data, 4UI953-00 AQ Instructor*Fac of Ed

Item	Current Value	New Value
Job Change Reason: \star	72	Not Selected
Pay Effective Date: MM/DD/YYYY	12/01/2018	01/07/2019
Personnel Date: MM/DD/YYYY	12/03/2018	01/07/2019
Annual Salary:	800	
CRN/Course Code:	EDAQ	
Contract Type:	Primary	Not selected V
Job Status:	Active	Active 🗸
Factor: (Not Enterable)	4	
Pays: (Not Enterable)	4	

Field/ Step	Field Entry						F	Page Vi	iew				
Effective Date	Leave as default (same as query	Curre Effect	nt tive Date:	12/01/2018									
	date)	COAI	ndex Fund	d Organizati	on Account Prog	gram Activit	y Location Proj	ect Cost Perc	ent Encumbr	ance Overri	ide End D	ate	
COA	Leave as default	U	1500	120 2400	62000 10			100	0.00				
Fund	Defaults to type of position and	New											
	faculty	Effect	ive Date: M		1/07/2019		Dua ana m		I a anti-an	Ducient	Cont	Descent	Frankran Annual Frad Data
Organization	Defaults to type of position and	Q U	Index	Q 130020	2400	62000	Q 10		Location	Project	Cost	100.00	Encumprance Override End Date
Ū	faculty/dept												
Account	Defaults to type of position and												
	faculty/dept	٩ 🗌		Q	Q	٩		Q.					
Program	Defaults to type of position and										lotal:	100.00	1
5	faculty/dept. NOTE: When doing	🗹 Def	aulting valu	ues for Labor D	istribution from t	he Job record	ls.						
	mass uploads, leave the Program	Defai	ult from Inde	ex Save and A	dd New Rows								
	code blank												
Activity	Leave as default unless BPO												
	recommends otherwise												
Location	Leave as default												
Project	Leave as default												
Cost	Leave as default												
Percent	Leave as default												
Encumbrance	Leave as default	1											
Override End Date													



Default from Index	Do not select	
and Save and Add		
New Rows		

Field/ Step	Field Entry	Page View				
Job Change	Leave as default unless EPAF	Enter Job END Information, 4UI9	53-00 AQ Instructor*Fac of Ed			
Reason	change requires otherwise	Itom	Current Value New Value			
Job Status	Not enterable	lob Change Reason:	72 73 Contract Completion	~		
Job End Date	Not enterable	Job Status: (Not Enterable)	Active T			
Pay Effective Date	Enter contract job end date	Job End Date: MM/DD/YYYY(Not Enterable)) 01/25/2019			
	-	Pay Effective Date: MM/DD/YYYY	12/01/2018			
		Personnel Date: MM/DD/YYYY*	12/03/2018			
Personnel Date	Enter contract end date					
Field/ Step	Field Entry		Page View			
Approval Level –	Click on magnifying glass icon and					
First Row	select the Dept/Faculty BPO					
Required Action	Leave as default	Routing Queue				
	Click on magnifying glass icon and	Approval Level User Name		Required Action		
Second Bow	coloct the correct UP Dept Approver	20 - (BPO) Departmental BPO's	Fun Bobby	Approve		
Second Row		50 - (HR) HR Department	Phoebe Buffay	Approve		
Required Action	Leave as default	Not Selected		Not Selected		
		Not Selected V Q		Not Selected		
Approval Level –	Click on magnifying glass icon and	Not Selected		Not Selected V		
Third Row	select the HRCATALOGUOIT	Not Selected		Not Selected		
Required Action	Leave as default	Save and Add New Rows				
Save and Add New	Do not select	1				
Rows						

Additional Qualifications - Terminate Job (AQ – Terminate Job, AQTERM)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying glass icon to search by name	



Query Date	Enter the new end date of the change	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. * - indicates a required field.
Approval Category	Select AQ – Terminate Job, AQTERM	ID: * 100729842 Leap Frog Query Date: MM/DD/YYYY* 12/22/2018 Approval Category: * Ag - Terminate Job, AGTERM
Click	Go	Employee Job Assignments Type PositionSuffix Title Type Time Sheet Organization Start Date End Date Last Paid Date Start Date Last Paid Date Start Date Last Paid Date All Jobs Active
Position	Leave as default	The first or search for a new position number and enter the suffix, or select the link under Title.
Suffix	Leave as default	ID: Leap Frog. 100729842 Query Date: Dec 22, 2018 Approval Category: A0 - Terminate Job (Stop Pav), AOTERM
Select	Select the appropriate position to be terminated	Enter Job End Date for Pay Effective Date, GETRM Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
Click	Go	Primary 4U1953 00 AQ Instructor*Fac of Ed 3700, Human Resources Dec 01, 2018 Jan 25, 2019 Active All Jobs Next Approval Type Go

Field/ Step	Field Entry			Page View
Job Change	Leave as default	Enter Job End Date for Pay I	Effective Date	, 4UI953-00 AQ Instructor*Fac of Ed
Reason		Item	Current Value	New Value
Job End Date	Enter data from current value	Job Change Reason: (Not Enterable)	72	ETOD
	column	Job End Date: MM/DD/YYYY	01/25/2019	
Pav Effective Date	Enter as Job End Date for current	Pay Effective Date: MM/DD/YYYY	12/01/2018	
.,	value column	Job Status: (Not Enterable)	Active	
Annual Salarv	Leave as default	Annual Salary: (Not Enterable)	800	
Job Change	Indicate the change reason by	Enter New Contract End Dat	e, 4UI953-00	AQ Instructor*Fac of Ed
Reason	selecting the appropriate dropdown	Item	Current Value	New Value
	option	Job Change Reason: *(Not Enterable	e) 72	ETND
Pay Effective Date	Enter as query date	Pay Effective Date: MM/DD/YYYY	12/01/2018	12/22/2018
Personnel Date	Enter as query date	Personnel Date: MM/DD/YYYY	12/03/2018	12/22/2018
Job Status	Not enterable	Job Status: 🖌 Annual Salary: (Not Enterable)	Active 800	Leave without Pay, without Benefits 💙
Annual Salary	Leave as default			



Field/ Step	Field Entry		Pa	ge View		
Approval Level –	Click on magnifying glass icon and	Routing Queue				
Top Row	select the HR Advisor	Approval Level	User Name	_	Required Action	1
Required Action	Leave as default	10 - (ADVSR) HR Advisor	HRADM9	Monica Geller	Approve	
Approval Level –	Click on magnifying glass icon and	90 - (HR-APP) HR Apply		VOIT HRMEP	Apply	
Second Row	select Dept BPO	Not Selected	✓ Q.		Not Selected	~
Required Action	Leave as default	Not Selected			Not Selected	~
		Not Selected			Not Selected	~
Approval Level –	Click on magnifying glass icon and	Save and Add New Rows				
Third Row	select HRCATALOGUOIT					
Required Action	Leave as default					
•						
Save and Add New	Do not select					
Rows						

Additional Qualifications - Rehire (AQ – Rehire, AQXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying glass icon to search by name	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. • Indicates a required field. ID: • 100729842 Leap Frog
Query Date	Enter contract start date	Approval Category: * AQ - Rehire, AQXEMP
Approval Category	Select AQ – Rehire, AQXEMP	Go
Click	Go	Employee Job Assignments Time Sheet Organization Start Date End Date Last Paid Date Status Primary Primary AQ Instructor*Fac of Ed 3700, Human Resources Dec 01, 2018 Jan 25, 2019 Active
Position	Enter position number as indicated by EPAF Summary sheet	
Suffix	Enter '01' as the suffix number if it	Approval Category: AQ - Rehire, AQXEMP
	has the same position number. If however the position number is different, the suffix can be '00' again	AQ - Rehire, AQXEE2 Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid DateStatus/Select Q New Job 401953 01 AQ Instructor*Fac of Ed 2400, Faculty of Education Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2"Colspan
Select	Leave as default	adot IIA
Click	Go	Next Approval Type Go



Field/ Step	Field Entry		Page Vie	W
Job Change Reason	Leave as default	AQ - Rehire, 4UI953-01 A	Q Instructor*Fac of Ed	
Current Hire Date	Leave as default	Item	Current Value	New Value
Pay Effective Date	Leave as default	Job Change Reason: *	12/02/2019	72, Contract Position
Personnel Date	Leave as default	Pay Effective Date: MM/DD/1111*	12/03/2018	01/15/2019
Job Begin Date	Leave as default	Pay Ellective Date: MM/DD/TTTA	r	01/15/2019
Annual Salary	Enter annual salary as indicated by HR Partner and Hiring Supervisor	Job Begin Date: MM/DD/YYYY		01/15/2019
CRN/Course Code		CRN/Course Code: *		
Pay Type	Leave as default	Рау Туре:		1
Contract Type	Leave as default	Contract Type:		Secondary V
Employee Status	Leave as default	Employee Status:	Active	Active V
Employee Class	Leave as default	Employee Class Code: \star	7U, Research Associate Salary	Q
Code		District Code:	OIT, U. of Ont. Institute of Tech	OIT, U. of Ont. Institute of Tech.
District Code	Not enterable	Home COAS:	U	
Home COAS	Not enterable	Home Organization:	3700, Human Resources	3700
Factor	Not enterable	Factor: (Not Enterable)		
Pays	Not enterable	Pays: (Not Enterable)		1

Field/ Step	Field Entry						P	Page Vi	ew				
Effective Date	Leave as default (same as query date)	Curre Effect COA I	nt ive Date: 0 ndex Fund	1/15/2019 Organization	Account Progra	ım Activity L	ocation Proje	ct Cost Percer	it Encumbran	ce Override	End Date	e	
COA	Leave as default	New											
Fund	Defaults to type of position and	Effecti COA	ve Date: MM Index	Fund	0rganization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
	faculty	QU		Q 130020	Q 2400	Q 62000	Q 10					100.00	
Organization	Defaults to type of position and	d d]	
	faculty/dept	۹ 🗌		٩	٩	٩	٩	٩					
Account	Defaults to type of position and	٩		Q	Q.	Q	Q	Q			Totali		
	faculty/dept										rotan.	100.00	
Program	Defaults to type of position and	✓ Defail	ult from Index	Save and Ad	d New Rows								
	faculty/dept. NOTE: When doing	Delat	are it offit index	Julia and Ad									



	mass uploads, leave the Program
	code blank
Activity	Leave as default unless BPO
	recommends otherwise
Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End Date	
Default from Index	Do not select
and Save and Add	
New Rows	

Field/ Step	Field Entry		Page View	
Job Change	Leave as default	Enter Job END Information, 4UI9	53-01 AQ Instructor*Fac of Ed	
Reason		Item	Current Value New Value	
Job Status	Not enterable	Job Change Reason:	73, Contract Completion	
Job End Date	Not enterable	Job Status: (Not Enterable)		
Pay Effective Date	Enter as contract end date	Pay Effective Date: MM/DD/YYYY(Not Enterable		
-		Personnel Date: MM/DD/YYYY		
Personnel Date	Enter as contract end date			

Field/ Step	Field Entry		Pag	e View		
Approval Level –	Click on magnifying glass icon and					
First Row	select the Dept/Faculty BPO	Routing Queue				
Required Action	Leave as default					
Approval Level –	Click on magnifying glass icon and	20 - (BPO) Departmental BPO's	User Name	Fun Bobby	Approve	ion
Second Row	select the HR Department Approver	50 - (HR) HR Department	Q HRBA	Phoebe Buffay	Approve	
Required Action	Leave as default	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	×
Approval Level –	Click on magnifying glass icon and	Not Selected			Not Selected	~
Third Row	select HRCATALOGUOIT	Not Selected	<u>م</u>		Not Selected	~
Required Action	Leave as default	Not Selected			Not Selected	~
Save and Add New	Do not select	Save and Add New Rows				
Rows						



Academic Associate - New Hire Salary (AA – New Hire, AANEMP)

Field/ Step	Field Entry	Page View
D	Enter Banner ID or use the	Refer an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search by	∗ - indicates a required field.
	name	ID: * 100729841 Koopa Troopa Q
Query Date	Enter contract start date	Query Date: MM/DD/YYYY 13/03/2018
Approval Category	Select AA – New Hire Salary, AANEMP	Approval Category: * AA - New Hire, AANEMP
Click	Go	A There are no active jobs based on the Query Date.
Position	Enter position number as indicated by EPAF Summary sheet	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Koopa Troopa, 100729841 Query Date: Dec 03, 2018
Suffix	Enter '00' as the suffix number	Approval Category: Academic Assoc - New Hire, AANEMP Annual Paid - New Hire, INEMP2 SearchType Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
Select	Leave as default	New Job 400959 00 Academic Associate*H.Sci 2500, Faculty of Health Sciences Image: A trace are no active Jobs based on the Query Date. Image: Academic Associate*H.Sci 2500, Faculty of Health Sciences
Click	Go	All Jobs Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Sex	Copy Current Value or select	
	from dropdown	
SSN/SIN/TIN	Enter SIN	
Birth Date	Enter Birth Date	
Citizenship	Select from dropdown	
Title (30 characters)	Enter the full title of new hire	
Current Hire Date	Leave as default	
Pay Effective Date	Leave as default	
Personnel Date	Leave as default	



Job Begin Date	Leave as default	Annual Paid - New Hire, 4	U0959-00 Aca	demic Associate*H.Sci
Annual Salary	Enter annual salary as indicated by HR Partner and Hiring supervisor	Item Job Change Reason: * Sex: * SSN/SIN/TIN: * Birth Date: MM/DD/YYYY*	Current Value F Female 123456789 06/30/1986	iew Value 72, Contract Position V Not Selected V V
Pay Type	Leave as default	Citizenship: *		Not Selected
Contract Type	Select Primary	Current Hire Date: MM/DD/YYYY	*	12/03/2018
Employee Status	Leave as default	Pay Effective Date: MM/DD/YYYY Personnel Date: MM/DD/YYYY	*	12/03/2018
Employee Class Code	Leave as default	Job Begin Date: MM/DD/YYYY		12/03/2018
District Code	Not enterable	Annual Salary: * Contract Type: *		Primary V
Home COAS	Not enterable	Employee Status: Employee Class Code:	c	Active V 80
Factor	Not enterable	District Code: (Not Enterable)		OIT
Pays	Not enterable	Home COAS: (Not Enterable) Home Organization: Factor: (Not Enterable)	c	U 3700 26
		Pays: (Not Enterable)		26

Field/ Step	Field Entry						F	Page Vi	ew				
Effective Date	Leave as default (same as query date)	Currer Effecti COA Ir	nt ive Date: ndex Fun	12/03/2018 d Organizatio	on Account Prog	am Activity	Location Proje	ect Cost Perce	nt Encumbrai	nce Override	e End Dat	e	
COA	Leave as default	New	Datas N										
Fund	Defaults to type of position and faculty		Index	Fund Q 100000	Organization	Account	Program	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Override End Date
Organization	Defaults to type of position and faculty/dept	0 0 0											
Account	Defaults to type of position and faculty/dept	٩,		Q	Q	Q	Q	Q.			Total:	100.00	
Program	Defaults to type of position and faculty/dept.	✓ Defaul	lt from Ind	ex Save and	Add New Rows								
	NOTE: When doing mass uploads, leave the Program												
	code blank												
Activity	Leave as default unless BPO												
	recommends otherwise												
Location	Leave as default												
Project	Leave as default]											
Cost	Leave as default												



Percent	Leave as default
Encumbrance Override	Leave as default
End Date	

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Job END Information, 4009	959-00 Academic Associate*H.Sci
Job Status	Not enterable	Item	Current Value New Value
Job End Date	Not enterable	Job Change Reason:	73, Contract Completion
Pay Effective Date	Enter as contract end date	Job End Date: MM/DD/YYYY(Not Enterable))
		Pay Effective Date: MM/DD/YYYY	
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY*	

Field/ Step	Field Entry			Pag	le View		
Approval Level – Top	Click on magnifying glass	Routing Queue					
Row	icon and select the HR	Approval Level	Us	er Name		Required Actio	n
	Advisor	10 - (ADVSR) HR Advisor	<u> </u>	HRADM8	Gunther Friends	Approve	
Required Action	Leave as default	20 - (BPO) Departmental BPO's		HRADM9	Monica Geller	Approve	
Approval Level – Second	Click on magnifying glass	50 - (HR) HR Department				Approve	
Row	icon and calcot the	Not Selected	10			Not Selected	\checkmark
ROW		Not Selected	- - -			Not Selected	~
	Dept/Faculty BPO	Not Selected	· Q			Not Selected	\sim
Required Action	Leave as default	Not Selected	· Q			Not Selected	\sim
Approval Level – Third	Click on magnifying glass	Save and Add New Rows					
Row	icon and select the HR						
	Department Approver						
Required Action	Leave as default						
Approval Level – Fourth	Click on magnifying glass						
Row	icon and select						
	HRCATALOGUOIT						
Required Action	Leave as default]					

Academic Associate - Change Job (AA – Job Info Change, AACJOB)

Field/ Step	Field Entry	Page View	
		1.10	



ID Query Date	Enter Banner ID or use the magnifying glass icon to search by name Enter effective date to reflect	
	when the salary of the	
	contract changed	Employee Job Assignments Type PositionSufficiTite Time Sheet OrganizationStart Date End Date Last Paid DateStatus
Approval Category	Select AA – Job Info Change	Primary 400959 00 Academic Associate 3700, Human Resources Dec 03, 2018 Dec 30, 2019 Active
	AACJOB	All Jobs
Click	Go	
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Koopa Troopa, 100729841 Query Date: Dec 21, 2018 Prevent Critement schedule: Ance or binane lab. Ancione
Suffix	Leave as default	Approval Category: Academic Assoc - Change Job, AACADB Annual Paid - Chg Job Data, IC/OB2 SearchType Position Suffix[Title Time Sheet Organization/Start Date End Date Last Paid Date[Status]Select
Select	Select position which requires an info change	Primary 4U0959 00 Academic Associate 3700, Human Resources Dec 03, 2018 Dec 30, 2019 Active
Click	Go	Na Jobe Next Approval Type Go

Field/ Step	Field Entry			Page View	
Job Change Reason	Select change reason from	Annual Paid - Chg Job Dat	a, 4U0959-0) Academic Associate	
	dropdown	Item	Current Value	New Value	
Pay Effective Date	Leave as default	Job Change Reason: 🙀	72	Not Selected	
Personnel Date	Leave as default	Pay Effective Date: MM/DD/YYYY	12/03/2018	12/21/2018	
		Personnel Date: MM/DD/YYYY*	12/03/2018	12/21/2018	
		Annual Salary: 🜟	81000		
		Job Status: \star	Active	Active 🗸	
		Factor:	26	26	
		Pays:	26	26	
Annual Salary	Enter revised amount if				
	required				
Job Status	Leave as default				
Factor	Not enterable]			
Pays	Not enterable				

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as	
	query date)	


COA	Leave as default	
Fund	Defaults to type of position and	
	faculty	
Organization	Defaults to type of position and	Current
	faculty/dept	Effective Date: 12/03/2018
Account	Defaults to type of position and	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date U 100000 2500 62001 15
	faculty/dept	100.00
Program	Defaults to type of position and	New
	faculty/dept. NOTE: When	Effective Date: MM/DD/YYYY 12/21/2018
	doing mass uploads, leave the	
	Program code blank	
Activity	Leave as default unless BPO	
	recommends otherwise	
Location	Leave as default	100.00
Project	Leave as default	Defaulting values for Labor Distribution from the Job records. Default from Index Save and Add New Rows
Cost	Leave as default	
Percent	Leave as default	
Encumbrance Override	Leave as default	
End Date		

Field/ Step	Field Entry		Page View						
Job Change Reason	Leave as default	Enter Job END Information 410	nter Joh END Information 410050 00 Academic Accession						
Job Status	Not enterable		1939-00 Acade						
Job End Date	Not enterable	Item	Current Value	e New Value					
Pay Effective Date	Enter as job end date from	Job Change Reason: Job Status: (Not Enterable)	72 Active	73, Contract Completion					
	current value column	Job End Date: MM/DD/YYYY(Not Enterab	le) 12/30/2019						
Personnel Date	Enter as job end date from	Pay Effective Date: MM/DD/YYYY	12/03/2018						
	current value column	Personnel Date: MM/DD/YYYY*	12/03/2018						

Field/ Step	Field Entry	Page View
Approval Level – Top	Click on magnifying glass icon	
Row	and select the HR Advisor	
Required Action	Select approve	



Approval Level – Second Row	Click on magnifying glass icon and select the HR Dept/Faculty BPO from the dropdown	Routing Queue			
Required Action	Select approve	Approval Level	Jser Name	Martin Caller	Required Action
Approval Level – Third	Click on magnifying glass icon	20 - (BPO) Departmental BPO's	RADM9	Fun Bobby	Approve
Row	and select the correct HR	50 - (HR) HR Department	HRADM9	Monica Geller	Approve
1.00	Department Approver from the	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
	drandown	Not Selected]	Not Selected
		Not Selected			Not Selected
Required Action	Select approve	Not Selected]	Not Selected V
Approval Level – Fourth	Click on magnifying glass icon	Not Selected			Not Selected V
Row	and select HRCATALOGUOIT	Save and Add New Kows			
Required Action	Select apply				

Academic Associate - Terminate Job – (AA – Terminate Job, AATERM)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to	* - indicates a required field.
	search by name	ID: * 100729841 Koopa Troopa
Query Date	Enter the new end date of the	Query Date: MM/DD/YYYY* 12/21/2018
	change	Approval Category: * AA - Terminate Job, AATERM
Approval Category	Select AA – Terminate Job,	Go
	AATERM	Employee Job Assignments
Click	Go	Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 4U0959 00 Academic Associate 3700, Human Resources Dec 03, 2018 Dec 30, 2019 Active
		All Jobs
Position	Leave as default	Finter or search for a new position number and enter the suffix, or select the link under Title.
		ID: Koopa Troopa, 100729841 Query Date: Dec 21, 2018
Suffix	Leave as default	Approval Category: AA - Terminate Job (Stop Pay), AATERM
		Enter Job End Date for Pay Effective Date, GETRM SearchType [Position Suffix]Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
Select	Select the appropriate position	
	to be terminated	Primary 4U0959 00 Academic Associate(3700, Human Resources Dec 03, 2018Dec 30, 2019 Active
Click	Go	
		Next Approval Type Go



Field/ Step	Field Entry		Page View
Job Change Reason	Not enterable	Enter Job End Date for Pay E	/ Effective Date, 4U0959-00 Academic Associate
Job End Date	Enter data from Current Value	Item	Current Value New Value
	column	Job Change Reason: (Not Enterable)	le) 72 ETOD
Pay Effective Date	Enter as Job End Date from	Pay Effective Date: MM/DD/YYYY(Not Ente	12/03/2018
-	Current Value column	Job Status: (Not Enterable)	Active
Annual Salary	Leave as default	Annual Salary: (Not Enterable)	81000
Job Change Reason	Not enterable	Annual Paid - Stop Pay, 4009	J0959-00 Academic Associate
Pay Effective Date	Leave as query date	Item	Current Value New Value
Personnel Date	Leave as query date	Job Change Reason: *(Not Enterable)	ble) 72 ETND
Job Status	Not enterable	Personnel Date: MM/DD/YYYY	12/03/2018 12/21/2018 12/03/2018 12/21/2018
Annual Salary	Leave as default	Job Status: * (Not Enterable)	Active

Field/ Step	Field Entry		Pag	e View		
Approval Level – Top	Click on magnifying glass icon	Routing Queue				
Row	and select the HR Advisor	Approval Level	User Name		Required Acti	on
Required Action	Leave as default	10 - (ADVSR) HR Advisor	Q HRADM9	Monica Geller	Approve	
Approval Level –	Click on magnifying glass icon	20 - (BPO) Departmental BPO's	HRADM29	Chandler Bing	Approve	
Second Row	and select Departmental BPO	Not Selected			Apply Not Selected	~
Required Action	Leave as default	Not Selected 🗸	٩		Not Selected	~
Approval Level – Third	Click on magnifying glass icon	Not Selected	۵	1	Not Selected	~
Row	and select HRCATALOGUOIT	Save and Add New Rows	~		Not Selected	•
Required Action	Leave as default					

Academic Associate - Rehire (AA – Rehire, AAXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to search	10: • 100729841 Koopa Troopa
	by name	Query Date: MM/DD/YYYY+ 12/31/2018
Query Date	Enter contract start date	Approval Category: AA - Rehire, AAXEMP
Approval Category	Select AA – Rehire, AAXEMP	
Click	Go	Employee Job Assignments Type Position/Suffix/Title Time Sheet Organization/Start Date End Date Last Paid Date/Status Primary/40055 00 Academic Associate/3700, Human Resources Dec 03, 2018/Dec 30, 2019 Active



Position	Enter position number as indicated by EPAF Summary sheet	Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Koopa Troopa, 100729841 Query Date: Dec 31, 2018 Approval Category: Academic Assoc - Rehire, AAXEMP					
Suffix	Enter '01' as the suffix number if it has the same position number. If however the position number is different, the suffix can be '00' again.	Annual Paid - Rehire, 1XEMP2 Search Type Position Start Date End Date Last Paid DateStatus Select Q New Job 400959 01 Academic Associate*H.Sci 2500, Faculty of Health Sciences Image: Colspan="2">Image: Colspan="2">Colspan="2"					
Select Click	Leave as default Go						

Field/ Step	Field Entry			Page View
Job Change Reason	Leave as default	Annual Paid - Rehire, 4009	959-01 Academic As	sociate*H.Sci
Title (30 Characters)	Enter the full rehire's employee	Item	Current Value	New Value
	title	Job Change Reason: *		72, Contract Position
Current Hire Date	Leave as default	Title(30 characters): *	12/02/2019	
Pay Effective Date	Leave as default	Pay Effective Date: MM/DD/YYYY	12/03/2010	12/31/2018
Personnel Date	Leave as default	Personnel Date: MM/DD/YYYY*		12/31/2018
Job Begin Date	Leave as default	Job Begin Date: MM/DD/YYYY*		12/31/2018
Annual Salary	Enter annual salary as indicated	Annual Salary: *		
	by CBA, HR Partner and Hiring	Employee Status:	Active	Active V
	supervisor	Employee Class Code: *	8U, Academic Associates	٩
Contract Type	Not enterable	Home COAS: (Not Enterable)	U	
Employee Status	Leave as default	Home Organization: Factor: (Not Enterable)	3700, Human Resources	3700
Employee Class Code	Enter as 8U	Pays: (Not Enterable)		26
Home COAS	Not enterable			
Home Org	Not enterable			
Factor	Not enterable			
Pays	Not enterable			

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query	
	date)	
COA	Leave as default	



Fund	Defaults to type of position and faculty													
Organization	Defaults to type of position and faculty/dept													
Account	Defaults to type of position and faculty/dept													
Program	Defaults to type of position and	Curren	nt ive Date: :	12/31/2018										
	faculty/dept. NOTE: When doing	COAI	ndex Fund	Organization	Account Pro	gram Activity	Location Proje	ct Cost Perce	nt Encumbrar	ice Override	End Date			
	mass uploads, leave the	New Effecti	ve Date: MI	M/DD/YYYY 12	/31/2018									
	Program code blank	COA Q U	Index	Fund	Organizati	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
Activity	Leave as default unless BPO	9		٩	٩ 	Q	Q	Q		1	1			
-	recommends otherwise	a			a	- a								
Location	Leave as default	٩		_]Q[Q.	Q	Q	Q			Total:][
Project	Leave as default	~										100.0	0	
Cost	Leave as default	Defau	alt from Inde	x Save and A	dd New Rows									
Percent	Leave as default													
Encumbrance	Leave as default													
Override End Date														
Default from Index	Do not select													
and Save and Add														
New Rows														

Field/ Step	Field Entry		Page View
Job Change Reason	Leave as default	Enter Job END Information, 4U0959-01	Academic Associate*H.Sci
Job Status	Not enterable	Item Current	Value New Value
Job End Date	Not enterable	Job Change Reason:	73, Contract Completion
Pay Effective Date	Enter as contract end date	Job Status: (Not Enterable)	Т
		Job End Date: MM/DD/YYYY(Not Enterable)	
		Pay Effective Date: MM/DD/YYYY	
Personnel Date	Enter as contract end date	Personnel Date: MM/DD/YYYY*	

Field/ Step	
-------------	--

Field Entry

Page View



Approval Level – Top	Click on magnifying glass icon	Routing Queue				
row	and select the correct HR Advisor	Approval Level	User Name		Required Acti	on
	from the drondown	10 - (ADVSR) HR Advisor	Q HRADM8	Gunther Friends	Approve	
		20 - (BPO) Departmental BPO's	RRADM9	Monica Geller	Approve	
Required Action	Leave as default	50 - (HR) HR Department	HRADM6	Fun Bobby	Approve	
Approval Level –	Click on magnifying glass icon	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	~
Second row	and select the correct HR	Not Selected	▼ ≪		Not Selected	× ×
Cecenarion	Dept/Equilty BBO from the	Not Selected	v Q		Not Selected	~
		Not Selected	✓ Q		Not Selected	~
1	dropdown	Save and Add New Rows				
Required Action	Leave as default					
	Click on magnifying glass icon					
Third Row	and select the correct HR					
	Department Approver from the					
	dropdown					
Pequired Action						
Required Action						
Approval Level –	Click on magnifying glass icon					
Fourth Row	and select HRCATALOGUOIT					
Required Action	Leave as default					
Save and Add New	Do not select					
Rows						

Coach – New Employee (Coach New Employee, CHNEW)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Reter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	glass icon to search by name	* - indicates a required field.
Query Date	Enter contract start date as August 1st of	ID: * 100729847 Coach Carter
	any given year (08/01/YYYY)	Query Date: MM/DD/YYYY* 08/01/2018
Approval	Select Coach New Employee, CHNEW	Approval Category: * Coach New Employee, CHNEW
Category		Go
Click	Go	A There are no active jobs based on the Query Date. All Jobs All Jobs
Position	Enter position number 6A9984	
Suffix	Enter '00' as the suffix number	



Select	Leave as default	 Enter or search for a new position number and enter the suffix, or select the link under Title. ID: Coach Carter, 100729847
Click	Go	Query Date: Aug 01, 2018 Approval Category: Coach New Employee, CHNEW
		Coach New Job, CHNEW Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select Search Type New Job GA9984 00 AT/Def Term*Athletics 3543, Basketball Image: Status Select
		All Jobs Next Approval Type Go

Field/ Step	Field Entry		Pag	je View
Job Change	Leave as default	Coach New Job, 6A9984-00 AT/Def Te	erm*Athletics	······
Reason		Item	Current Value	New Value
Contract Type	Select Primary	Job Change Reason: (Not Enterable)		72
SSN/SIN/TIN	Enter SIN	Contract Type:		Primary V
Sex	Copy from Current Value column	SSN/SIN/TIN:	123456789	
Citizenship	Not enterable	Sex: Citizenshin: (Not Enterable)	Male	Not Selected Y
Birth Date	Enter Birth Date	Birth Date: MM/DD/YYYY	12/21/1948	
Supervisor ID	Enter the Banner ID of the supervisor	Supervisor ID: *		100224295
Current Hire Date	Leave as default	Current Hire Date: MM/DD/YYYY*(Not Enterable)	08/01/2018
Job Begin Date	Leave as default	Job Begin Date: MM/DD/YYYY(Not Enterable)		08/01/2018
Pay Effective	Leave as default	Pay Effective Date: MM/DD/YYYY		08/01/2018
Date		Annual Salary: *		
Annual Salary	Enter annual salary as indicated on	Employee Class Code:		
	Athletics Manager spreadsheet	Home COAS:		
Title (30	Enter full title of new coach	Home Organization:		Q 3700
characters)		Factor: (Not Enterable)		2
Employee Class	Leave as default	Pays: (Not Enterable)		2
Code		Step: (Not Enterable)		0
Home COAS	Not enterable	Job Status: (Not Enterable)		L
Home Org	Not enterable			
Factor	Not enterable			
Pays	Not enterable			
Step	Not enterable			
Job Status	Not enterable			



Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query date)	Current
COA	Leave as default	Effective Date: 08/01/2018 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
Fund	Defaults to type of position and faculty	New Effective Date: MM/DD/YYYY 08/01/2018
Organization	Defaults to type of position and faculty/dept (NOTE: this number tends to differ based on which team the coach will be employed for)	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date Q Q Q 3543 Q 62060 Q 13 Q 100.00
Account	Defaults to type of position and faculty/dept	Total: 100.00
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	Default from Index Save and Add New Rows
Activity	Leave as default unless BPO recommends otherwise	
Location	Leave as default	
Project	Leave as default	
Cost	Leave as default	
Percent	Leave as default	
Encumbrance Override End Date	Leave as default	
Default from Index and Save and Add New Rows	Do not select	

Field/ Step	Field Entry	Page View
Pay Effective Date (First	Enter as provided by pay	
Payment)	period of given year	
Job Status	Not enterable	



Pay Effective Date (First Payment End) Job Status Job End Date Pay Effective Date (Second Payment) Job Status Pay Effective Date (Second Payment End) Job Status Pay Effective Date (End	Enter as provided by pay period of given year Enter as contract end date Not enterable Enter as provided by pay period of given year Not enterable Enter as provided by pay period of given year Not enterable Enter the given end date for	Coach First Payment, 6A9984-00 AT/Def Term*Athletics Term Value New Value Pay Effective Date: MM/DD/YYYY
Coach Contract)	the coach's contract (which usually falls on March 31 st of any given year)	Item Current Value New Value Pay Effective Date: MM/DD/YYY+
Job Status	Not enterable	Pay Effective Date: MM/DD/YYYY

Field/ Step	Field Entry		Pag	je View	
Approval Level – Top	Click on magnifying glass	Routing Queue			
Row,	icon and select the correct	Approval Level	User Name		Required Action
	HR Advisor	10 - (ADVSR) HR Advisor	HRADM15	Joey Tribbiani	Approve
Required Action	Leave as default	20 - (BPO) Departmental BPO's	HRADM29	Chandler Bing	Approve
		50 - (HR) HR Department		Phoebe Buffay	Approve
Approval Level – Second	Click on magnifying glass	90 - (HR-APP) HR Apply	HRCATALOGUOIT	UOIT HRMEP	Apply
Row	icon and select the correct	Not Selected	✓ Q		Not Selected V
1.00		Not Selected	✓ Q.		Not Selected
	HR Dept/Faculty BPO	Not Selected	✓ Q,		Not Selected V
Required Action	Leave as default	Not Selected	▼ Q.		Not Selected V
		Save and Add New Rows			
Approval Level – Third	Click on magnifying glass				
Row	icon and select the correct				
	HR Department Approver				
Required Action	Leave as default				



Approval Level – Fourth	Click on magnifying glass
Row	icon and select
	HRCATALOGUOIT
Required Action	Leave as default
Save and Add New Rows	Do not select

Coach – Rehire (Coach Rehire, CHXEMP)

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the magnifying	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go. Judicates a requiried field
	glass icon to search by name	Instances a required result ID: µ[10: 29847] Coach Carter] Q,
Query Date	Enter contract start date as August 1 st	Query Date: MM/DD/YYYYs 08/01/2019
	of any given year	Approval Category: * Coach Rehire, CHXEM9 Go
Approval	Coach Rehire, CHXEMP	Employee Job Assignments
Category		Type PositionSuffix Time Time Sheet Organization Start Date End Date Last Paid Date/Status Primary6A9984 00 Head Coach, Men's Basketball[3700, Human Resources] Aug 01, 2018/Mar 31, 2019 Leave without Pay, without Benefits
Click	Go	All Jobs
Position	Enter position number 6A9984	Enter or search for a new position number and enter the suffix, or select the link under Title.
		ID: Coach Carter, 100729847 Query Date: Aug 01, 2019
Suffix	Enter '01' as the suffix number	Approval Category: Coach Rehire, CHXEMP
		Coach Rehire, CHXEMP
Select	Leave as default	Search Type Position Suffix filte Time Sheet Organization Start Date End Date Last Paid Date Status Select New Job 6A9984 01 AT/Def Term*Athletics 3543, Basketball Image: Status Select
Click	Go	All Jobs
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change	Leave as default	
Reason		
Contract Type	Select Secondary	
Current Hire	Leave as default	
Date		
Job Begin Date	Leave as default	
Pay Effective	Leave as default	
Date		



Annual Salary	Enter annual salary as indicated on Athletics Manager's spreadsheet	Coach Rehire, 6A9984-01 AT/Def Te	erm*Athletics	
Supervisor ID	Enter the Banner ID of the Supervisor	Item Job Change Reason: (Not Enterable) Contract Type:	Current Value	New Value 72 Secondary
Title (30 characters)	Enter full title of the rehired coach	Current Hire Date: MM/DD/YYYY(Not Enterable Job Begin Date: MM/DD/YYYY*(Not Enterable) Pay Effective Date: MM/DD/YYYY*	≥) 08/01/2018 I	08/01/2019 08/01/2019 08/01/2019
Employee Class Code	Leave as default	Annual Salary: * Supervisor ID: * Title(30 characters):		
Home COAS	Not enterable	Employee Class Code:	CO, Coaches	Q CO
Home Org	Not enterable	Home COAS:	U	QU
Factor	Not enterable	Home Organization: Factor: (Not Enterable)	3700, Human Resource	2
Pays	Not enterable	Pays: (Not Enterable)		2
Step	Not enterable	Step: (Not Enterable)		0
Job Status	Not enterable	Job Status, (Not Entelable)		L

Field/ Step	Field Entry	Page View
Effective Date	Leave as default (same as query date)	Current Effective Date: 08/01/2019 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date
COA	Leave as default	New
Fund	Defaults to type of position and faculty	Effective Date: MM/DD/YYYY 06/01/2019 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date U 100000 3543 62060 113 100.00 100.00
Organization	Defaults to type of position and faculty/dept (NOTE: this number tends to differ based on which team the coach will be employed for)	
Account	Defaults to type of position and faculty/dept	Derault from muex Save and aud new Kows
Program	Defaults to type of position and faculty/dept. NOTE: When doing mass uploads, leave the Program code blank	



Activity	Leave as default unless
	BPO recommends
	otherwise
Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance Override	Leave as default
End Date	
Default from Index and	Do not select
Save and Add New	
Rows	

Field/ Step	Field Entry	Page View
Pay Effective Date (First	Enter as provided by pay	Coach First Payment, 6A9984-01 AT/Def Term*Athletics
Payment)	period of given year	Item Current Value New Value
Job Status	Not enterable	Pay Effective Date: MM/DD/YYYY*
Pay Effective Date (First	Enter as provided by pay	Job Status. Active
Payment End)	period of given year	Coach First Payment End, 6A9984-01 AT/Def Term*Athletics
Job Status	Enter as contract end date	Item Current Value New Value
Job End Date	Not enterable	Pay Effective Date: MM/DD/YYYY* Job Status: Leave without Pay, without Benefits
Pay Effective Date	Enter as provided by pay	Coach Second Payment, 6A9984-01 AT/Def Term*Athletics
(Second Payment)	period of given year	Item Current Value New Value
Job Status	Not enterable	Job End Date: MM/DD/YYYY(Not Enterable) -
Pay Effective Date	Enter as provided by pay	Pay Effective Date: MM/DD/YYYY
(Second Payment End)	period of given year	
Job Status	Not enterable	Coach Second Payment End, 6A9984-01 AT/Def Term*Athletics
Pay Effective Date (End Coach Contract)	Enter the given end date for the coach's contract (which usually falls on March 31 st of	Item Current Value New Value Pay Effective Date: MM/DD/YYYY*
	any given year)	End Coach Contract, 6A9984-01 AT/Def Term*Athletics
Job Status	Not enterable	Item Current Value New Value Pay Effective Date: MM/DD/YYYY*



Field/ Step	Field Entry		Pag	e View		
Approval Level – Top	Click on magnifying glass	Routing Queue				
Row	icon and select the HR	Approval Level	User Name		Required Action	n
	Advisor	10 - (ADVSR) HR Advisor	RADM15	Joey Tribbiani	Approve	
Required Action	Leave as default	20 - (BPO) Departmental BPO's	RADM29	Chandler Bing	Approve	
Approval Level – Second	Click on magnifying glass	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply	
Row	icon and select Dept/Faculty	Not Selected	۹.		Not Selected	\sim
Now		Not Selected	٩		Not Selected	\sim
	DFU	Not Selected	Q		Not Selected	~
Required Action	Leave as default	Not Selected V			Not Selected	\checkmark
Approval Level – Third	Click on magnifying glass	Save and Add New Rows				
Row	icon and select HR					
	Department Approver					
Required Action	Leave as default					
Approval Level – Fourth	Click on magnifying glass					
Row	icon and select					
	HRCATALOGUOIT					
Required Action	Leave as default]				
Save and Add New Rows	Do not select					

CU – Casual Hourly UOIT New Hire, CUNEW and Invigilator – New Hire INNEW

NOTE: A <u>CASUAL EMPLOYEE</u> IS ONE WHO IS HIRED TO PERFORM SERVICES ON AN UNSCHEDULED, NON-REGULAR BASIS, USUALLY AT AN HOURLY RATE OR AT A SET AMOUNT FOR THE JOB. THE LENGTH OF EMPLOYMENT MAY BE OF INDEFINITE OR DEFINITE DURATION. CASUAL EMPLOYEES WILL BE CONTACTED WHEN WORK IS AVAILABLE AT WHICH TIME THEY MAY ELECT TO ACCEPT OR DECLINE THE WORK OPPORTUNITY.

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	
	magnifying glass icon to	
	search by name	
Query Date	Enter contract start date	
Approval Category	Select CU – Casual Hourly	
	UOIT New Hire, CANEW or	
	Invigilator, INNEW	



Click	Go	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
		★ - indicates a required field.
		ID: * 100729843 Chris Bosh Q
		Query Date: MM/DD/YYYY* 12/03/2018
		Approval Category: * CU - Casual Hourly UOIT New Hire, CUNEW
		Go
		⚠ There are no active jobs based on the Query Date.
		All Jobs
Position	Enter position number as	Renter or search for a new position number and enter the suffix, or select the link under Title.
	indicated by EPAF Summary	ID: Chris Bosh, 100729843
	sheet	Approval Category: New Hire Casual Hourly - UOIT, CUNEW
Suffix	Enter '00' as the suffix number	
		Search Type Position Sumix Fittle Time Sneet Organization Start Date End Date Last Paid Date Status/Select Q New Job cA9994 00 Casual/Invigilator - FSSH 2300, Fac. of Social Science & Humanities Image: Status Select
Select	Leave as default	▲ There are no active jobs based on the Query Date.
Click	Go	All Jobs
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	Hire Casual Employee - UOIT, CA9994-00 Casual/Invigilator - FSSH
Contract Type	Not enterable	Item Current Value New Value Job Change Reason: (Not Enterable) 72
SSN/SIN/TIN	Enter SIN	Contract Type: (Not Enterable)
Birth Date	Enter Birth Date	SSN/SIN/TIN: 123456/89 Birth Date: MM/DD/YYYY 03/24/1984
Sex	Copy Current Value or select	Sex: Male Not Selected Not Selected Not Selected
	from dropdown	Current Hire Date: MM/DD/YYYY 12/03/2018
Citizenship	Select from dropdown	Pay Effective Date: MM/DD/YYYY 12/03/2018
Current Hire Date	Leave as default	Personnel Date: MM/DD/YYYY 12/03/2018 Hourly Rate: •
Job Begin Date	Leave as default	Title(30 characters):
Pay Effective Date	Leave as default	Supervisor ID: *
Personnel Date	Leave as default	Employee Status: (Not Enterable) A Job Status: (Not Enterable) A
Hourly Rate	Enter hourly rate in	Employee Class Code: Q CA
	accordance with	Home Organization: (Not Enterable) 3700
	compensation structure and	Pay Type: (Not Enterable) HRLY Step: (Not Enterable) 0
	collective agreements	District Code: (Not Enterable)
	concerning position	
Title (30 characters)	Enter full title of new hire	



Timesheet Orgn	Click on the magnifying glass icon and select the code for your faculty/dept. IF you are not sure of the Org. please email Financesystems@uoit.ca
Supervisor ID	Enter the Supervisor ID
Employee Status	Not enterable
Job Status	Not enterable
Employee Class Code	Not enterable
Home COAS	Not enterable
Home Org	Not enterable
Рау Туре	Not enterable
Step	Not enterable
District Code	Not enterable

Field/ Step	Field Entry	Page View												
Effective Date	Leave as default (same as	Upda	te Labour	Distributio	n, CA9994-0	0 Casual/I	invigilator -	FSSH						
	query date)	Curre	nt 											
COA	Leave as default	COA I	ndex Fund	2/03/2018 Organization	Account Progra	am Activity	Location Proje	ect Cost Perce	nt Encumbran	ce Override En	d Date			
Fund	Defaults to type of position and faculty	New Effecti	ive Date: MM	/DD/YYYY 12/	03/2018									
Organization	Defaults to type of position	COA Q U	Index	Fund Q 100000	Q 2300	Account G2064	Q 10	Activity	Location	Project	Cost	Percent 100.00	Encumbrance Overri	ide End Date
organization	and faculty/dent	Q		Q	٩	Q	Q							
Account	Defaults to type of position			 	 		Q		Q					
Account	and foculty/dept	0		Q.	Q		Q	Q.	Q.	Q.				
											Total:	100.0	D	
Program	Defaults to type of position	4												
	and faculty/dept. NOTE:	Defau	ult from Index	Save and Ad	d New Rows									
	When doing mass uploads,													
	leave the Program code blank													
Activity	Leave as default unless BPO													
	recommends otherwise													
Location	Leave as default													
Project	Leave as default													



Cost	Leave as default
Percent	Leave as default
Encumbrance Override	Leave as default
End Date	
Default from Index and	Do not select
Save and Add New	
Rows	

Field/ Step	Field Entry	Page View							
Job Change Reason	Not enterable	Enter Job END Information, CA9	994-00 Casual/Invigilator - FSSH						
Job End Date	Not enterable	,							
Pav Effective Date	Enter as contract end date	Item	Current Value						
		Job Change Reason: (Not Enterable)	73						
		Job End Date: MM/DD/YYYY(Not Enterable	e)						
		Pay Effective Date: MM/DD/YYYY*							
		Job Status: (Not Enterable)	Т						
Job Status	Not enterable								

Field/ Step	Field Entry			Page View	
Approval Level –	Click on magnifying glass icon and				
Top Row	select the Dept/Faculty BPO	Routing Queue			
Required Action	Leave as default	Approval Level	User Name		Required Action
•		20 - (BPO) Departmental BPO's	RADM9	Monica Geller	Approve
Approval Level –	Click on magnifying glass icon and	90 - (HR-APP) HR Apply		UOIT HRMEP	Apply
Second Row		Not Selected	✓ Q		Not Selected V
Second Row	SEIECCHINCATALOOUOTT	Not Selected	✓ Q		Not Selected V
Deguined Action		Not Selected	✓ Q.		Not Selected V
Required Action	Leave as default	Not Selected	✓ Q.		Not Selected V
Save and Add New	Do not select	Save and Add New Rows			
Rows					

CU – Casual Hourly UOIT Change Job, CUCHG and Invigilator – Change Job INCHG

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	
	magnifying glass icon to search by	
	name	



Query Date	Enter effective date of the change	Enter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
Approval Category	Select CU – Casual Hourly UOIT	* - indicates a required field.
	Change Job. CUCHG or	ID: * 100729843 Chris Bosh Q
	Invigilator, INCHG	Query Date: MM/DD/YYYY* 12/12/2018
Click	Go	Approval Category: * CU - Casual Hourly UOTT Change Job, CUCHG
Choix	60	30
		Employee Job Assignments
		Primary[CA9994] Invigilator 3512, Student Life (Operating) Dec 03, 2018 Dec 31, 2018 Active
		All Jobs
Position	Leave as default	Enter or search for a new position number and enter the suffix, or select the link under Title.
		ID: Chris Bosh, 100729843 Query Date: Dec 12, 2018
Suffix	Leave as default	Approval Category: Change Casual Hourly - UOIT, CUCHG
		Change Casual Employee - UOLT, CUCHG Frank Party In part of the International International International International International International
Select	Select the appropriate position to	Search type Postulur Summa fulle Time sneet organization Start bate End bate Last Paid bate Q New Job
	change	Primary CA9994 00 Invigilator[3512, Student Life (Operating) Dec 03, 2018[Dec 31, 2018] Active
Click	Go	
CIICK	60	All Jobs Next Approval Type Go
		Next Approval Type Go

Field/ Step	Field Entry			Page View
Job Change Reason	Indicate the change reason by selecting the appropriate dropdown	Change Casual Employee	- UOIT, CA999	94-00 Invigilator
	option	Item	Current Value	New Value
Pay Effective Date	Enter data from current value	Job Change Reason: * Pay Effective Date: MM/DD/YYYY	72 12/03/2018	Not Selected
	column	Hourly Rate:	15.5	
Hourly Rate	Enter the hourly rate or revised	Title(30 characters):	Invigilator	
	rate	Timesheet Orgn:	3512	
Title (30 characters)	Enter the full employee title of the	Supervisor ID:	100729842	
	new hire			
Timesheet Orgn	Click on the magnifying glass icon			
	and select the code for your			
	faculty/dept. IF you are not sure of			
	the Org. please email			
	Financesystems@uoit.ca			
Supervisor ID	Enter the Banner ID of the			
	supervisor			



Field/ Step	Field Entry						Page \	/iew					
Effective Date	Leave as default (same as Query Date)	Current Effective Date: 3 COA Index Fund	12/03/2018 Organizatio	n Account Prog	Jram Activity	y Location Pro	ject Cost Per	cent Encumbra	ince Override I	End Date			
COA	Leave as default	U 1000	00 2300	62064 10			10	0.00					
Fund	Defaults to type of position and	New											
	faculty	Effective Date: MI	M/DD/YYYY 12/	12/2018									
Organization	Defaults to type of position and faculty/dept	COA Index	Fund	Organization	Account	Program			Project	Cost	Percent 100.00	Encumbrance Override E	ind Date
Account	Defaults to type of position and												
	faculty/dept	Q	Q.		Q.				Q.				
Program	Defaults to type of position and									Total:	100.00		
	faculty/dept. NOTE: When doing	🖋 Defaulting valu	ies for Labor Dis	tribution from t	he Job record	s.							
	mass uploads, leave the Program	Default from Inde	x Save and Ad	d New Rows									
	code blank												
Activity	Leave as default unless BPO												
	recommends otherwise												
Location	Leave as default												
Project	Leave as default												
Cost	Leave as default												
Percent	Leave as default												
Encumbrance	Leave as default												
Override End Date													
Default from Index	Do not select												
and Save and Add													
New Rows													

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default unless EPAF	
-	change requires otherwise	
Job End Date	Not enterable	
Pay Effective Date	Enter as contract job end date	
-	from current value column	



Job Status	Not enterable	Enter Job END Information, CA9994-00 Invigilator						
		Item	Current Value	New Value				
		Job Change Reason: (Not Enterable)	72	73				
		Job End Date: MM/DD/YYYY(Not Enterable) 12/31/2018					
		Pay Effective Date: MM/DD/YYYY*	12/03/2018					
		Job Status: (Not Enterable)	Active	Т				

Field/ Step	Field Entry			Page View	
Approval Level – Top Row	Click on magnifying glass icon and select the Dept/Faculty BPO	Routing Queue			
Dequired Action		Approval Level	User Name		Required Action
Required Action	Leave as delault	20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve
		90 - (HR-APP) HR Apply	Q HRCATALOGUOIT	UOIT HRMEP	Apply
Approval Level – Second	Click on magnifying glass	Not Selected	va		Not Selected V
		Not Selected	✓ Q		Not Selected 🗸
Row	Icon and select	Not Selected	✓ Q.		Not Selected
		Not Selected	~ Q		Not Selected
	INCATALOGUOIT	Save and Add New Rows			
Required Action	Leave as default	ka ana ana ang ang ang ang ang ang ang an			
Save and Add New Rows	Do not select				

CU – Casual Hourly UOIT End Job, CUTERM and Invigilator – Terminate Job INTERM

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Reter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to	ID: # 100729843 Chris Bosh Q.
Ouers Dete	Search by name	Query Date: MM/DD/YYYY 12/29/2018
Query Date	Enter the new end date of the	Approval Category: * CU - Casual Hourly UOIT End Job, CUTERM
	change	Go
Approval Category	Select CU – Casual Hourly	Employee Job Assignments
	UOIT End Job, CUTERM or	Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary CA9994 00 Invigilator/3512, Student Life (Operating) Dec 03, 2018 Dec 31, 2018 Active
	Invigilator, INTERM	All Jobs
Click	Go	
Position	Leave as default	
Suffix	Leave as default	
Select	Select the appropriate position	
	to be terminated	



Click	Go	ID: Que: App Ente	ter or se ry Date roval C r Job E	earch fo e: Catego End Da	Chris B Chris B Dec 29, ory: End Ca: Inte for Pay	ition nu iosh, 10 , 2018 sual Ho <i>Effect</i>	mber and e 00729843 ourly - UO tive Date	nter the suffix, or select the link und IT, CUTERM , CUETRM	er Title.				
		Sear	ch Typ	pe P	osition	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date Stat	tus S	Select
		Q,	New	w Job									0
			Prim	nary C	A9994	00	Invigilato	r 3512, Student Life (Operating)	Dec 03, 2018	Dec 31, 2018	Activ	ive	۲
		All :	lobs										
		Nex	t Appro	oval Type	e Go								

Field/ Step	Field Entry	Page View							
Job End Date	Not enterable	Enter Job End Date for Pay Effective Date, CA9994-00 Invigilator							
Pay Effective Date	Enter Job End Date from current value column	Item Job End Date: MM/DD/YYYY(Not Ente	Current Value erable) 12/31/2018	New Value					
Job Change Reason	Not enterable	Job Change Reason: (Not Enterable)	72	ETOD					
Job Status	Not enterable	Job Status: (Not Enterable)	Active	L					
Time Entry Method	Not enterable	Time Entry Method: (Not Enterable)	Employee Time E	ntry via Web p					
Pay Effective Date	Enter as query date	Enter Early Termination Date	e for Work Study St	tudent, CA9994-00 Invigila					
Job Change Reason	Not enterable	Item	Current Value	New Value					
Job Status	Not enterable	Pay Effective Date: MM/DD/YYYY* Job Change Reason: (Not Enterable)	12/03/2018	12/29/2018					
Time Entry Method	Not enterable	Job Status: (Not Enterable) Time Entry Method: (Not Enterable)	Active Employee Time Entry via	L a Web P					

Field/ Step	Field Entry	Page View	
Approval Level – Top	Click on magnifying glass and		
Row	select the Faculty/Dept BPO	Routing Queue	
Required Action	Leave as default	Approval Level User Name	Required Action
Approval Level – Second	Click on magnifying glass and	90 - (HR-APP) HR Apply HRCATALOGUOIT × UOIT HRMEP	Apply
Row	select HRCATALOGUOIT	Not Selected	Not Selected
Required Action	Leave as default	Not Selected	Not Selected V
		Not Selected	Not Selected
Save and Add New	Do not select	Save and Add New Rows	
Rows			



CU – Casual Hourly UOIT Rehire Employee, CUREH and Invigilator - Rehire INREH

Field/ Step	Field Entry	Page View
ID	Enter Banner ID or use the	Renter an ID or select the link to search for an ID. Enter the Query Date and select the Approval Category. Select Go.
	magnifying glass icon to	* - indicates a required field.
	search by name	ID: * 100729843 Chris Bosh
Query Date	Enter contract start date	Query Date: MM/DD/YYYY* 01/01/2019
Approval Category	Select CU – Casual Hourly	Approval Category: * CU - Casual Hourly UOIT Rehire Employee, CUREH
	UOIT Rehire Employee,	Go
	CUREH or Invigilator, INREH	A There are no active jobs based on the Query Date.
Click	Go	All Jobs
Position	Enter position number as	Enter or search for a new position number and enter the suffix, or select the link under Title.
	indicated by EPAF Summary	D: Crinis bosh, 100/29843 Query Date: Jan 01, 2019
	sheet	Approval Category: Renire Casual Houriy - 0017, CUREH
Suffix	Enter '01' as the suffix number	Rehire Casual Employee - UOIT, CUREH Search Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Select
Select	Leave as default	V New Job CA9994 I01 Casual/Invigilator - FSSH 2300, Fac. or social science & Humanities
Click	Go	There are no active jobs based on the Query Date. All Jobs
		Next Approval Type Go

Field/ Step	Field Entry	Page View
Job Change Reason	Leave as default	
Contract Type	Not enterable	
Current Hire Date	Leave as default	
Job Begin Date	Leave as default	
Pay Effective Date	Leave as default	
Personnel Date	Leave as default	
Hourly Rate	Enter hourly rate in accordance	
	with compensation structure	
	and collective agreements	
	concerning position	
Title (30 characters)	Enter full title of rehire	
Timesheet Orgn	Click on the magnifying glass	
_	icon and select the code for	
	your faculty/dept. IF you are	



Supervisor ID	not sure of the Org. please email Financesystems@uoit.ca Enter the Supervisor ID for the	- Rehire Casual Employee - UOIT, CA9994-01 Casual/Invigilator - FSSH					
	directly report to	Job Change Reason: *(Not Enterable Contract Type: (Not Enterable))	72 5			
Employee Status Home COAS	Not enterable Leave as default	Current Hire Date: MM/DD/YYYY* Job Begin Date: MM/DD/YYYY* Pay Effective Date: MM/DD/YYYY*	12/03/2018	01/01/2019 01/01/2019			
Distribution COA Timesheet COA	Leave as default Not enterable	Personnel Date: MM/DD/YYYY* Hourly Rate: *		01/01/2019			
Home Org	Click on magnifying glass icon and select the correct home code for faculty/dept	Intie(30 cnaracters): * Timesheet Orgn: * Supervisor ID: * Employee Status: (Not Enterable)	Active				
Distribution Orgn	Click on magnifying glass icon and select the correct distribution code for faculty/dept	Home COAS: Distribution COA: Timesheet COA: (Not Enterable) Home Organization: Distribution Orgn: Job Status: (Not Enterable)	U U 3700, Human Resources 3700, Human Resources	u u u u u d 3700 a			
Job Status Pay Type Step	Not enterable Not enterable Not enterable	Pay Type: (Not Enterable) Step: (Not Enterable) District Code: (Not Enterable)	OIT, U. of Ont. Institute of Tech	HRLY 0			
District Code	Not enterable						

Field/ Step	Field Entry	Page View											
Effective Date	Leave as default (same as query	Updat	Update Labour Distribution, CA9994-01 Casual/Invigilator - FSSH										
	date)	Curren	t ve Date: (01/01/2019									
COA	Leave as default	COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date											
Fund	Defaults to type of position and	Effectiv	e Date: Mi	M/DD/YYYY 01/	01/2019	n Account	Department	Autholity	tostion	Deployt	Cout	Descent	Enumbrance Quentle Fed Date
	faculty	d u	ABOEA	Q 100000	Q 2300	Q 62064	Q 10	Q Q		Q		100.00	
Organization	Defaults to type of position and	a a	1	a	Q	a	Q	9	Q	Q		ļ —	
-	faculty/dept	a		٩	a	a	٩	٩	Q.	٩	Totals		
Account	Defaults to type of position and	~									Total.	100.00	10
	faculty/dept	Default	t from Inde	x Save and Ac	dd New Rows								
Program	Defaults to type of position and]											
	faculty/dept. NOTE: When doing												



	mass uploads, leave the Program
	code blank
Activity	Leave as default unless BPO
	recommends otherwise
Location	Leave as default
Project	Leave as default
Cost	Leave as default
Percent	Leave as default
Encumbrance	Leave as default
Override End Date	
Default from Index	Do not select
and Save and Add	
New Rows	

Field/ Step	Field Entry	Page View				
Job Change	Leave as default	Enter Job END Information, CA9994-01 Casual/Invigilator - FSSF				
Reason		Item	Current Value New Value			
Job End Date	Not enterable	Job Change Reason: (Not Enterable)	73			
Pay Effective	Enter as contract end date	Job End Date: MM/DD/YYYY(Not Enterable	e)			
Date		Pay Effective Date: MM/DD/YYYY* Job Status: (Not Enterable)				
Job Status	Not enterable					

Field/ Step	Field Entry	Page View						
Approval Level –	Click on magnifying glass and select							
Top Row	the Dept/Faculty BPO	Routing Queue						
Required Action	Leave as default	Approval Level	User Name		Required Action			
•		20 - (BPO) Departmental BPO's	Q HRADM9	Monica Geller	Approve			
Approval Level –	Click on magnifying glass and select	90 - (HR-APP) HR Apply	A HRCATALOGUOIT	UOIT HRMEP	Apply			
	Onek on magninging glass and select	Not Selected	v Q		Not Selected V			
Second Row	HRCATALOGUOIT	Not Selected	v Q		Not Selected			
De avvine d'Action		Not Selected	v q.		Not Selected			
Required Action	Leave as default	Not Selected	V Q		Not Selected V			
Save and Add New Rows	Do not select	Save and Add New Rows						



Table B – Employee Class Codes

Full Time

Employee Grouping:	E-Class:					
Full Time Continuing Non-Academic						
Senior Executive – VPs	1E					
Directors and AVPs	1A					
Deans	1D					
Associate Deans	1F					
OPSEU Staff – Level 10 and above	1G					
Long Term Disability	1L					
Non Union – Level 9 and below	2A					
OPSEU Staff – Level 9 and below	2G					
Full Time Continuing Academic						
Senior Non Academic VP's and Exec's	1B					
Tenured and Tenure Track Faculty	1U					
Teaching Faculty	3U					

Part Time

Employee Grouping:	E-Class:
Contract / Limited Term Non-Academic	
LT Non Academic Non Union Staff (Salary)	5A
LT Non Academic Non Union Staff (Hourly)	5H
LT Non Academic Non Union Staff (Salary)	6A
LT Non Academic Non Union Staff (Hourly)	6H
Limited Term OPSEU - Salary	9A
Limited Term OPSEU- Hourly	9H
Coaches	CO
Casual	CA
Invigilators	IN
Work Study	WS
Contract / Limited Term Academic	
Teaching Assistants / Research Assistants (hired per semester)	5U
Sessional Instructors (hired per semester)	4U
Limited Term Faculty Member	8U
Research Associates Salary	7U
Research Associates (Annual Salary)	7A
Research Associates Hourly (timesheet)	7H
Post Docs Fellows	2U



Appendix A – Citizenship codes

When creating an EPAF the following is a list of citizenship codes that are valid.

- 0 Canadian
- 1 Permanent Resident
- 2 Study Permit
- 3 Other
- 4 No Status in Canada
- 9 Not Reported
- C Convention Refugee
- VE Visa Exempt



Appendix B - Common Errors

The following is a list of some common errors that arise when creating an EPAF.

1. Duplicate suffix used?

When a duplicate suffix is applied to the same person this can cause multiple errors in the system:

TAXEM2 *ERROR* Begin Date must equal the first Jobs Detail Effective Date. TRMJB2 *ERROR* Begin Date must equal the first Jobs Detail Effective Date. TAXEM2 *WARNING* Future changes exist - starting on 10-JAN-2020. *ERROR* Eff Date must be greater than Last Paid Date of 10-JAN-2020. *ERROR* Begin Date must equal the first Jobs Detail Effective Date. *ERROR* Effective must be greater than Last Paid Date of 10-JAN-2020.

What to do?

You can **VOID** the last contract create for that person using the same suffix and then create a new one with the correct suffix.



Glossary

CA – Collective Agreement NU – Non Union