

Emporia State University

Budget Office Training

Highlights of Form C

New- Form C can now be saved at the Originators level. Once the first section (Employee Info) has been entered click the “Save for Later” check box, then click the Submit button. An email will be sent to you with a link on how to re-open that form and continue entering data.

How to load the employee information:

- ✓ If the person has a Banner E #, enter the E # then press the Tab key. If this person’s information is in the budget database, demographic information will load. Should the Form C not load any information, first verify the E # is keyed correctly. If it is correct, remove the E #, and instead enter the SSN. The E# will be populated if the SSN is in Banner and has been assigned and E# even though it ~~they~~ does not exist in the budget system. This individual will still need to be treated as a new hire, which requires entering all the appropriate demographic information
 - Sources to find a Banner E #:
 - Look up on the Banner Form SPAIDEN in INB;
 - Payroll funding reports from Cognos; or
 - Time and leave screen.
- ✓ If the person is new to the University, key the SSN and all the other appropriate information. An E# will be created at a later date.
- ✓ Identity Theft Prevention Program
 - Masks the SSN, and birth date immediately for existing employees, and after the form is submitted for new employees.

How to complete employment information:

- ✓ NEW-If the individual is also working in another department select the department from the drop-down list
 - This will automatically add routing to include the department Approving Authority as an additional approver. The Approving Authority’s office manager will also be allowed to document retrieve the form.

How to complete the funding information:

- ✓ Type Index number
 - Press the Tab key to ~~it will~~ populate the Fund, Orgn, Program, Activity fields
- ✓ Select Account number from the drop down.
 - 61110 – Unclassified Salaries – Perm
 - 61111 – Unclassified Salaries – Temp
 - 61030 – USS(University Support Staff)– Perm
- ✓ Enter the Fund Pos #.

- Identifies the budget line used to finance the salary
 - Use the Budget Fund Position Lookup(Cognos report)
 - Will always be 7 characters
 - Will always start with a “U” for Unclassified and “C” for USS
- ✓ Enter the Appt. Position Number.
 - Identifies the type of position in terms of benefits eligibility
 - U*T – Temporary non-benefits eligible
 - U*P – Benefits eligible exempt -.50 FTE or greater
 - U*H – Benefits eligible non-exempt(hourly) .50 FTE or greater
 - U*N – Temporary non-benefits-non-exempt(hourly)
 - 899XXX – Permanent UNC benefits eligible
 - 999XXX – Permanent USS benefits eligible
 - Will always be 6 characters

How to complete the Additional information:

- ✓ New-enter total credit hours to be taught by semester
- ✓ Information is required for employees who are teaching on-line courses and live outside of Kansas and anyone who works outside of Kansas.

Approvals – Form C Approval Matrix:

- ✓ A New FC Approval Matrix will control who approves the Form C. It is similar to the AP Approval Matrix, but they are two separate tables.
- ✓ Approvers are position-based, so if one approver terminates and another one is hired in the same position, no change is required.
- ✓ Form Cs approvals are by ORGN (the ORGN in your funding row).
- ✓ Approval Levels look like this:

Level	Role
10	Office Manager
20	Chair
25	Approving Authority
29	Dean Assistant
30	Dean
35	Grants
40	Affirmative Action
44	VP Assistant
45	VP/Provost
50	President
70	Budget

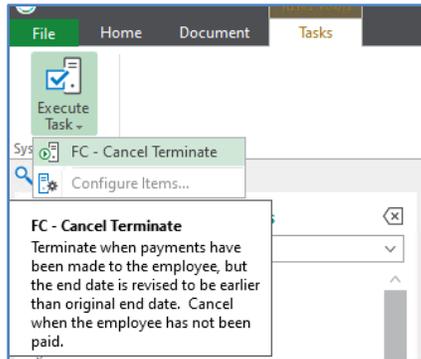
- ✓ Please notify the IT OnBase Team (Patty Delmott and Skylar Headrick)
 - To add new ORGNs or remove old ORGNs
 - Notify us when approvers will be on extended leave or sabbatical so we can add an alternate approver or mark the existing approver as “Always Ignore”.
 - Notify us when position numbers of approvers change.

Delete from Workflow:Cancel/Terminate:

- ✓ If the Form C is still in Workflow but has not been to the Budget Queue, the form may be deleted. It may only be deleted by the Originator in the Originator queue.
- ✓ If the Form C is still in Workflow and has been to the Budget Queue, it must be returned to the Originator in the Originator queue where it can be cancelled or terminated.

Cancel/Terminate:

- ✓ If the Form C is no longer in Workflow, the Originator will
 - Document Retrieve the Form C
 - **In Web Client** – Right click, Workflow, System Tasks, select FC – Cancel Terminate



- **In Unity Client** – Click the Task tab at the top, Execute Task, select FC – Cancel Terminate
- Follow the directions for the task

[Workflow] User Interaction

Enter "Terminated" if employee has been paid, "Canceled" if not paid. Date format is mm/dd/yyyy.

FC Status

FC Cancel Term Date

Tips and Tricks:

- ✓ On the Form C there is a yellow section right above the Funding Section. Click it to review Form C tips and tricks:

Click here for tips and tricks

Copy/Paste: Fields like EID and Position number have been set up to require alpha or numeric characters in certain positions and to ensure the entire field has been populated (appears like dashes when data has not been entered). Copy (CTRL + C) from source document, select (highlight, CTRL + A) entire field on Form C and paste (CTRL + V). For EID you must highlight all the dashes in the field before you can paste.

InfoPath Termination Form: Create an InfoPath Termination form for all terminations. This form lets different departments on campus know about the termination for collecting building keys, parking fines.... You also need to complete a **Term/Cancel** on a Form C if the employee is temporary or rehired on a year to year basis.

Term/Cancel: If the form is still in workflow, make sure it has been returned to the Originator. Terminate the Form C when payments have already been made to the employee but the end date is being revised to be earlier than the original end date on the Form C. Use the last date the employee worked. Cancel the Form C when the form has been approved all the way through the process but the starting pay period has not been processed yet. Use the date before they would have started work.

Term/Cancel - for forms not in workflow. Document Retrieve the Form C you wish to cancel/term in the **Unity Client**. At the top of the window, click the TASK tab, then click Execute Task to get a dropdown list of available tasks. Click FC - Cancel Terminate, enter the date and type. In the **Web Client**, Document Retrieve the Form C, right click, Workflow, System Tasks, select FC - Cancel Terminate.

Calculating Hourly Pay: Enter 2 of the 3 three fields, **Hourly Rate**, **Hours per Pay Period** or **Salary**, and the third field will be calculated for you. If you need to start over, blank out 2 of the 3 fields. **Example 1:** If you offered \$41,000 and the employee will work 80 hours/pp, enter those and hourly rate will calculate to 19.72, however, Salary will also recalculate from \$41,000 to \$41017.60 due to rounding. **Example 2:** If you know the hourly rate will be 19.75 and the employee works 80 hours/pp, the salary is calculated at \$41080.