General entry notes:

- Grad appointment entry is restricted to entry for graduate students who have previously held a 9511, 9519, 9521, or 9529 appointment in the same department.
- After an entry is made, entry staff must complete the payroll summary spreadsheet on Drive.
- Units will need to monitor the expected job end date query for graduate appointments ending within the next 30 days. The query is HRMS: Main Menu > Reporting Tools > Query > Query Viewer, “UM_HR_Expected_End_DT_Audit”
- Termination should always be used for ending graduate appointments
- Sample Action/reasons for changes:
  - Transfer from RA to TA or TA to RA - Transfer/transfer
  - Change in reports to - Position change/reports to
  - Pay rate change - Pay rate change/merit
  - Standard hour change - Position change/standard hours

Graduate appointment entry instructions (9511/9519 and 9521/9529) by Job Data tab

1. Academic year
   a. Work Location

   ![Work Location Image]

   i. Effective date: start date of the appointment
ii. Action/Reasons:

- Hire/Hire- use for building a new record when you cannot build on an existing record (e.g. employee has summer record that needs to stay separate)
- Hire/Additional job- use to add additional job records when an employee already has an active job record during the same time period
- Rehire/greater than 30 days- use when the record has been terminated longer than 30 days
- Rehire/within 30 days- use when the record has been terminated less than 30 days

iii. Position number:

- To enter a new position, clear the field and tab out before typing in the new number.
- If you are changing the position number mid-appointment or transferring someone at any time, you will need to enter an action reason that reflects the change being made (e.g. position change/standard hours) before entering a new position number.

iv. Expected job end date: All graduate appointments require an expected job end date. Please use the last day worked to ensure reports encumber correctly.

b. Job information
i. Employee Class - Graduate Assistant
ii. Standard hours/FTE - double check that the correct information pulled through with the position number

c. **Job Labor** - leave all defaults as they are

d. **Payroll**
i. Absence system- other
ii. Pay group- P09
iii. Employee type
   - E- exception hourly; this will be used for the majority of graduate appointments
   - H- hourly; if this is used, please send an estimate of semester hours to be worked to the graduate school so they can calculate the tuition benefit

e. **Salary plan**- leave all defaults as they are

f. **Compensation**
i. Frequency: H
ii. Rate Code: HRLY
iii. Comp rate: Calculate compensation- must click button before saving

2. **Distribution Entry**
   a. Select FY2016
   b. Select link under “funded by”- this will likely already be set up as “by appointment.”
   c. Add rows at data level you would like to change:
      i. Effective date- use to add a distribution effective a new date
      ii. Earnings Distribution- use to add additional earn codes (grads will almost always be blank)
      iii. Distribution details- use to add account strings/combo codes