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About the NextGen Graduate Appointments System

The purpose of the NextGen Graduate Appointments System is to streamline the processes of hiring, modifying and separating graduate assistants. This new system allows graduate faculty members to initiate transactions for their graduate assistants, and then submit the transaction for routing through all of the necessary human resources and funding venues to capture electronic signatures. NextGen will also create an electronic Terms and Conditions contract based on the information confirmed by the human resources approvers within the routing process, and send the Terms and Conditions contract to the supervisor and student for electronic signatures. Once the appropriate human resources and financial approvals have been captured, and the student and supervisor have signed the Terms and Conditions contract, the transaction will automatically load into the PeopleSoft Human Resources system for payroll processing and store the Terms and Conditions contract electronically for historical reference.
NextGen Graduate Appointment System
To access the NextGen Graduate Appointments System, you must log into MyPack Portal with your unity ID and password, and follow the path as shown below: Human Resources System > NextGen Graduate System.
## Menu Items and Their Descriptions

From this menu, you will be able to process the following actions:

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Action Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Grad Appointment</td>
<td>Allows you to hire a graduate assistant. All initiators must use this module regardless of whether this is a new hire, rehire or additional job. The system will determine whether it is a new hire, rehire or additional job based on the student's job record(s) in the PeopleSoft HR System.</td>
</tr>
<tr>
<td>Rehire Graduate</td>
<td>To initiate actions in this module, an individual must have been assigned the &quot;Department HR Representative&quot; role via a SAR request. In this module, you are able to rehire a graduate student into a prior assistantship the student held within the last year. You are only able to pull previous appointments that are within the department OUC(s) you have security access to view. The module will pull in previous information from the prior appointment and allow you to update/confirm pre-populated information before sending to approvers.</td>
</tr>
<tr>
<td>Modify Graduate</td>
<td>Allows you to modify an existing graduate appointment. Graduate faculty members may only initiate modifications for students they supervise. Individuals with the “Initiator” role are able to initiate modifications for students within their department OUC(s) based on their current security access. If you have the “Initiator” role but you are not assigned an OUC in your SAR access, you will not be able to initiate modifications for any graduate assistants unless you are listed as their supervisor.</td>
</tr>
<tr>
<td>Separate Graduate</td>
<td>Allows you to separate an existing graduate appointment. Graduate faculty members may only initiate separations for students they supervise. Individuals with the “Initiator” role are able to initiate separations for students within their OUCs based on their current security access. If you have the “Initiator” role but you are not assigned an OUC in your SAR access, you will not be able to initiate modifications for any graduate assistants unless you are listed as their supervisor.</td>
</tr>
<tr>
<td>Graduate Worklist</td>
<td>Allows you to view all pending, completed and canceled actions that have been processed through NextGen Graduate Appointments. If you are a graduate faculty member without any roles in NextGen, you will only be able to view actions for students that you supervise. For all other roles, you will only be allowed to view actions for which you have department OUC access.</td>
</tr>
<tr>
<td>View T&amp;C Doc</td>
<td>Allows you to view pending and completed Terms and Conditions contracts. If you are a graduate faculty member without any roles in NextGen, you will only be able to view completed Terms and Conditions contracts for students that you currently supervise.</td>
</tr>
</tbody>
</table>
NextGen Roles & System Access Requests (SAR)

The following chart provides a description of the roles as they are referred to in this manual, as well as the name of their respective SAR roles.

<table>
<thead>
<tr>
<th>NextGen Role Description</th>
<th>SAR Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator</td>
<td>NCH HR CAMPUS Grad Initiator</td>
</tr>
<tr>
<td>College / Final Funding Approver</td>
<td>NCH HR CAMPUS GradCollFunding</td>
</tr>
<tr>
<td>Dean</td>
<td>NCH HR CAMPUS GradDean Appr</td>
</tr>
<tr>
<td>Supervisor / Graduate Faculty Member</td>
<td>NCH HR CAMPUS GradDeptFacAdmin</td>
</tr>
<tr>
<td>Department Funding Representative</td>
<td>NCH HR CAMPUS GradDeptFunding</td>
</tr>
<tr>
<td>Department HR Representative</td>
<td>NCH HR CAMPUS GradDeptHRAdmin</td>
</tr>
<tr>
<td>College / Final HR Approver</td>
<td>NCH HR CAMPUS GradHRFinalAprv</td>
</tr>
</tbody>
</table>

Colleges who have decided to wait and not give their graduate faculty members access to initiate new hire, modification and separation actions until staff members are more comfortable with this system – you will need to give your graduate faculty members “Initiator” access without giving them access to an OUC.

We also highly encourage departments and colleges to provide to all persons using NextGen Graduate Appointments (including graduate faculty members) with the "GSSP Inquiry" role in the Student Information System. This will allow graduate faculty members, initiators, human resources personnel and financial personnel with a snapshot into a student’s Graduate Student Support Plan record and eligibility (i.e., how many semesters the student has remaining for tuition support).
Approval Process
Each of the four modules of the NextGen Graduate Appointment System follows a similar approval workflow.

“New Graduate Appointment” & “Modify Graduate” Modules
With regards to the "New Graduate Appointment" and "Modify Graduate" modules, a graduate faculty member or other designated initiator will submit a transaction, which will then begin two separate approval processes: (1) a funding approval process, and (2) a human resources approval process. Approvals for both processes are independent of each other, meaning the transaction will go to the Department Funding Representative for approval then the College Funding Representative for approval, regardless of where the transaction is at for approvals and/or editing within the human resources process.
“Rehire Graduate” Module
With regards to the "Rehire Graduate" module, only individuals with the Department HR Representative security role can initiate a transaction; in other words, a graduate faculty member or other designated initiator cannot initiate the transaction. The approval processes once the Department HR Representative submits a transaction are the same as in the "New Graduate Appointment" and "Modify Graduate" modules.

“Separate Graduate” Module
For the "Separate Graduate" module, a graduate faculty member or other designated initiator may initiate the transaction. It will then only route to the Department HR Representative and the Final / College HR Approver for review and approval. If the person initiating the separation has both the Initiator and Department HR Representative roles, this module will skip the Department HR Representative approver once they have submitted the transaction for approval. While the funding approvers are not routed into the approval process, individuals with the Department Funding Representative and College Funding Approval roles will be notified via email once the transaction is approved.
Activity Guide

The menu on the left of all screens, including the Initiator page, is called the "Activity Guide." This tells anyone in the transaction at which level(s) the transaction resides for editing/approval. In this example, the Initiator has submitted the transaction for approval, so it now resides with the Department HR Representative and Department Funding Representative for editing and approval.
Hiring a Graduate Assistant

To process a new hire, rehire or additional job action for a graduate assistant, an Initiator must log into MyPack Portal and go to the following path: Human Resources Systems > NextGen Graduate System > New Grad Appointment
Search Page

Desired Start Date
From this screen, you must enter a desired start date prior to entering search criteria. The desired start date allows the system to check within the Student Information System (SIS) as well as in the HR System to determine the student’s eligibility as to whether they may hold a graduate assistantship (e.g., student status and enrollment), the student’s academic standing and the student’s current/pending/future jobs.

Searching for Students
Once you have entered a desired start date, you may search several different ways, including: first name, last name, academic program, student/employee ID (the 9-digit numerical number assigned to all students/employees on campus) and/or unity ID (the character-login assigned to each student/employee).

The example below displays a search by a student/employee ID. To see additional examples of searching for students, please refer to the following section: Searching for Students
Once you have found the student you would like to hire, click the check box under “Select” in your Search Results to select the student and trigger the cross-referencing of the student’s SIS and HR files with the potential hire action.

![Image of MYPACK Portal](image)

After a few seconds, if a student has a current, pending or future job, this information will show under the “Active, Future, and Pending Jobs as of Start Date” search box for the student.
Pending Jobs
If there is a pending job transaction that has not yet been approved or if the student is not eligible for a graduate assistantship appointment, you will receive a pop-up message informing you of this information. Note that students must be registered (full-time or less-than full-time) by Census Day of the current semester in order to be eligible for an assistantship. During the summer, students must either have been registered in the previous spring semester and/or eligible to register in the upcoming fall semester to hold an assistantship.

You will not be able to proceed with a hire transaction until the pending action has been approved or canceled. If you are trying to determine the status of a pending transaction, please refer to the list of Power Users. You should reference the leading two numbers in the “Dept ID” field and contact the corresponding power user for that college/department by matching these two leading numbers with the “College OUC” field in the Power Users Google Doc. For the College of Engineering, reference the “Department OUC” field within the Power Users Google Doc.

If there are no pending jobs, you will be able to click “Hire Graduate” and a new window will pop open.

Please ensure pop-up blockers have been disabled (click here for instructions).
Initiator Page
The first page (which opens in a new tab) will allow the initiator to enter as much information as they know about the appointment, such as the job title, appointment dates and salary. (Please make sure pop-up blocker is turned off.)

Job Title
For the job title, you may select the appropriate title from a drop-down menu. Extension assistantships are rarely offered to students so please consult with the Graduate School if you believe you are initiating a Graduate Extension Assistantship appointment.
Start Date & End Date
Enter the date the appointment should begin and the date the appointment should end. Start and end dates for graduate appointments commonly revolve around the academic year (August 16th to May 15th), fiscal years (July 1st to June 30th) or some combination thereof.

NOTE: The date limit for Graduate Teaching Assistants, as shown above. The entire appointment cannot extend outside of a single academic year.

Department
The initiator's home department will automatically populate in the Department field. Please change this department to the appropriate department OUC. If you should have questions about the appropriate OUC, please consult with your Human Resources Specialist.

Annual Salary
The HR System requires an annualized salary to be entered for an appointment. To calculate the annualized salary, click on the "Bi-weekly Calculator" to download a Microsoft Excel spreadsheet that assists you in calculating the annualized salary. In the spreadsheet, you must enter the start date of the appointment, the end date of the appointment, and the total take home pay that the student should receive. The spreadsheet will then calculate the annualized salary - enter this number into the "Annual Salary" field into the "Initiator" page.
Hours/Week & Full-Time Equivalent (FTE)

For the "Hours/Week" field, enter the number of hours a student should work per week for this appointment. Typical graduate assistantship appointments are between 10 and 20 hours per week. The FTE or "full-time equivalent" will automatically calculate based on the "Hours/Week" field.

The "Total FTE" beside the "Hours/Week" and "FTE" fields automatically sums the FTE of this appointment and any other current appointments the student has across campus. If the Total FTE is greater than or equal to 30 hours per week, or 0.75FTE, then the transaction will automatically route to the Dean or Vice Chancellor (or their designee) as an exception request. A warning message will also pop-up stating the initiator should talk to their Human Resources Specialist to see if the student's additional appointments across campus may be terminated.

Graduate students are not allowed to work more than 30 hours per week without an exception provided by the Dean or Vice Chancellor due to potential Affordable Care Act implications as well as FICA (Social Security and Medicare tax) implications. The IRS views students who are working 30 hours or more per week as an employee as opposed to a student. Therefore, students lose their FICA tax exemption and must pay FICA taxes, and the departments are likewise charged FICA taxes. Also, students who work 30 hours or more per week not only at NC State University but across the entire UNC-system will be offered Affordable Care Act (ACA) insurance. The Graduate Student Support Plan (GSSP) health insurance offered to students is considered to be between a gold and platinum plan when compared to a metallic scale whereas the current ACA healthcare plan falls below any metallic rating. See the NC State ACA Healthcare Website for more information.
Supervisor ID
The "Supervisor ID" automatically populates with the initiator's employee ID. If you are a staff member initiating a transaction on behalf of a graduate faculty member, then you will need to replace this ID with the graduate faculty member's ID number as this field determines who the Terms and Conditions contract will route to for electronic signature as the supervisor.

Academic Program
The "Academic Program" is automatically selected based on the student's declared program. If the student has multiple academic programs, the appropriate program for this particular appointment may be selected at the Department HR Admin's level.
Distribution Data
For the "Distribution Data" fields, you may enter the Project ID or a character description of the project into the "Project Description" field. For example, you may enter "Sweet potato grant" or "555555" into this field as there are no edits. The "Funding Type" denotes whether the project is a "Grant" or "Non-Grant" funding source. The initiator may enter the "Percent" or "Amount" of the salary that should be charged to this project and the field left blank will be automatically calculated. For example, if I enter 50% into the "Percent" field and the annual salary is $20,000, then the "Amount" field will automatically populate as $10,000. To add additional projects indicating this appointment will be split-funded, click the "+" sign beside the "Amount" field. The initiator may delete additional projects that may have been added by clicking the "-" button beside the "Amount" field as well.

Terms and Conditions Comments
The "Terms and Conditions Comments" field allows the initiator to enter any other terms or conditions of the appointment that is not captured in the auto-generated Terms and Conditions contract. For example, if the student is required to teach Statistics 201, then the initiator could enter "Student must teach Statistics 201," into this field.

Comments for Approvers
This box is for any comments that the initiator would like to send to the Department HR Representative and Department Funding Representative. They will be included in the email sent to folks with each role once the initiator clicks “Submit for Approval.” Comments cannot be edited or deleted and are required for pushbacks.
Save for Later vs. Submit for Approval
If the initiator needs to leave the transaction prior to submitting for approval, they may click "Save for Later" and "Exit" to leave the transaction. The initiator may access the transaction and submit for approval by going to Graduate Worklist (MyPack Portal > Human Resources System > NextGen Graduate System > Graduate Worklist), pulling up the transaction, and clicking "Submit for Approval."

GSSP Information
An additional feature on the Initiator page is the "GSSP Information." By clicking on this link, the initiator may view the Graduate Student Support Plan (GSSP) record for the student. This record will pop open in a new window and display several pieces of information about the student, including: the number of semesters the student has received GSSP (health insurance and/or tuition) support, the semester the student entered into Graduate School, the residency status of the student, etc. Note that individuals must have the "GSSP Inquiry" role in the Student Information System in order to view this information. The Graduate School recommends that all persons, including initiators, who have access to this system also have access to the GSSP Inquiry role in the Student Information System.
Activity Guide
The menu on the left of all screens, including the Initiator page, is called the "Activity Guide." This tells you at which level(s) the transaction resides for editing/approval. In this example, the initiator has submitted the transaction for approval, so it now resides with the Department HR Representative and Department Funding Representative for editing.
Approval Process

Once a transaction has been submitted by an initiator for approval, it begins two different approval processes - the funding approval process and the human resources approval process. Approvals for both processes are independent of each other, meaning the transaction will go to the Department Funding Representative for approval then the College Funding Representative for approval regardless of where the transaction is at for approvals and/or editing within the human resources process.

With this in mind, the order of the following pages is not the order of the transaction approvals. The approvals process for New Graduate Appointment transactions is as follows:
Department Human Resources (HR) Representative – Education

The Department HR Representative's first page for editing and/or approval is the Education page. The NextGen Graduate Appointments System will pull in the education information that has already been entered into the Human Resources System or, if no information has been entered into the Human Resources System, it will pull in the education information as confirmed in the Student Information System.

Education information already entered into the Human Resources System will be grayed out for editing. Education that pulls from the Student Information System will populate all fields excluding the "Major Code" field. This does not populate due to the fact that the major in the Student Information System is coded with a period within the numerical code whereas the Human Resources System codes majors with numbers only. Therefore, the Department HR Representative will have to type in the numbers into the "Major Code" field that are provided to the right of the field. If there are not six numbers in total to the right of the "Major Code" field for the Department HR Representative to type in, then note the actual major description, click on the magnifying glass to the right of the field and complete an advanced search by description contains.
If an education record is completely blank, then the Graduate School has not verified the student's degree. In other words, the student has not sent in and/or brought in their official transcript(s) to the Graduate School so that the college liaisons can verify their degree(s). Therefore, the Department HR Representative must reach out to the student and gather their education information or access the information through the student’s application, as well as encourage them to provide the Graduate School with their official transcripts as official transcripts are required prior to graduation.

To add an education record, click on “Add” or the "+" on the page. If an education record is mistakenly added, click the "-" sign to delete the record.

Note that any degree(s) entered on this page will not transfer back to the Student Information System.

Once the education information is complete and correct, click "Save" in the bottom left-hand corner of the screen, then click "Next" in the top right-hand corner of the screen.
Department Human Resources (HR) Representative - Job Details

The second (and final) page for the Department HR Representative to edit/approve is the Job Details page. This page pulls in everything that the initiator entered on the Initiator page so that the Department HR Representative may verify the information and make any necessary edits. Note that the Department HR Representative does not have access to edit any information in the Distribution Data section of the transaction as that is reserved for the Department Funding Representative role. If all of the information was complete and accurate, the Department HR Representative will only have to enter the Building Location information (building name, room number and campus box).
Once the information has been verified as correct, the Department HR Representative may click "Approve" to create the Terms and Conditions contract that will be sent to the supervisor for review and approval.

If the initiator entered incorrect information and the Department HR Representative would like for the initiator to correct it, the Department HR Representative can click "Pushback" to send the transaction back to the initiator for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the initiator when the action is pushed back to their level.

If the Department HR Representative needs to exit the transaction and return at a later time to submit, then s/he may click "Save for Later" and "Exit" to be taken to MyPack Portal's homepage.

**Dean**

If the transaction causes the student’s aggregate number of hours per week worked across campus to exceed 29 hours per week, or 0.725 FTE (full-time equivalent), then the Dean (or his/her designee) will be routed into the human resources approval process. The Dean or designee will be notified via email that a pending transition is awaiting their approval. In reviewing the pending job, all other positions that the student currently holds across campus will also be listed.

For Dean approval instructions, please see the Dean Approval Section.

**Terms & Conditions Contract**

The Terms and Conditions contract is automatically created once the Department HR Representative clicks "Approve." It then routes to the supervisor (the individual listed in the "Supervisor" field on the Initiator and Department HR Admin pages) by notifying the individual via email that a contract is ready for their signature. The supervisor will click on the link in the email and be taken to their T&C approval page.

After the supervisor signs the Terms and Conditions, the student is notified via email that a contract is ready for their review and signature. The student will click on the link in the email and be taken to their T&C approval page.

For Supervisor or Student Terms & Condition approval instructions. Please see the T&C Approval Section.
**Department Funding**

Once the initiator submits the transaction, the Department Funding Representative is also notified via email that a transaction is at their level for review and approval. They will see the exact same page as the Department HR Representative; however, all of the information will be grayed out for editing except for the distribution information.

If an initiator entered information into the Distribution Data section of the Initiator page, then all fields will filter into the Distribution Data section for the Department Funding Representative. The "Project Description" field is not the actual "Project ID" field as there are no edits on the "Project Description" field for the initiator. If there were edits on this field, initiators may not know how to address any errors they receive relating to inactive project IDs, account codes, redistributions, etc. If the initiator entered an actual project ID into the "Project Description" field and the Department Funding Representative agrees with the project ID entered s/he may copy and paste the project ID from the "Project Description" field to the "Project ID" field. The Department Funding Representative may correct any information as needed as well as add/delete distribution records via the "+" and "-" buttons to the right of the transaction.

Once the Department Funding Representative has verified the information and made any necessary corrections, they may submit the transaction for approval by clicking "Approve."

If the Initiator entered incorrect information and the Department Funding Representative would like for the Initiator to correct it, the Department Funding Representative can click "Pushback" to send the transaction back to the initiator for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the initiator when the action is pushed back to their level.

If the Department Funding Representative needs to exit the transaction and return at a later time to submit, then s/he may click "Save for Later" and "Exit" to be taken to MyPack Portal's homepage.
Attachments
Attachments, such as funding approval emails or any other back up documentation, can be uploaded at any time during an action. The View/Add Attachment link is located at the bottom of every action just above the comments section.

For instructions on how to upload or view an attachment, see the Attachments Section.

College/Final Funding Approver
The College Funding Approver will receive an email notification once the Department Funding Representative has approved the transaction. When the College/Final Funding Approver views the transaction, it is the same page as the Department Funding Representative and Department HR Representative have both completed. The only difference is the College/Final Funding Approver cannot edit any information - they can only approve or pushback the transaction for corrections.

Once the College/Final Funding Approver has verified the information entered by the Department Funding Representative for accuracy and compliance, they may submit the transaction for approval by clicking "Approve."

If the Department Funding Representative entered incorrect information, the College/Final Funding Approver can click "Pushback" to send the transaction back to the Department Funding Representative for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department Funding Representative when the action is pushed back to their level.
After the College/Final Funding Approver has approved the transaction, it will remain on hold until the student signs the Terms and Conditions contract. At that point, the transaction routes to the College/Final HR Approver for final approval prior to loading into the HR System for payroll processing.
College/Final Human Resources (HR) Approver

After the financial and human resources processes have been completed, the transaction will route to the College/Final HR Approver for the final review prior to being loaded into the Human Resources System.

Once the College/Final HR Approver has verified the information entered by the Department HR Representative for accuracy and compliance, they may submit the transaction for approval by clicking "Approve."

If the Department HR Representative entered incorrect information, the College/Final HR Approver can click "Pushback" to send the transaction back to the Department HR Representative for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.

Once approved by the College/Final HR Approver, the approver will receive a pop-up that the action has been submitted for processing. This means that the action has been submitted but has not yet loaded into base. The action’s status will be maintained in the Graduate Worklist. If the action does not load properly, an error email will be sent to the College/Final HR Approver.
Modification

To navigate to the Modification screen, follow the path below:
Human Resources Systems > NextGen Graduate System > Modify Graduate

Searching for Students

Before searching for a student, you must enter a desired effective date prior to entering search criteria. The desired effective date allows the system to check within the Student Information System (SIS) as well as in the HR System to view the student’s academic standing and the student’s current/pending/future jobs.

Once you have entered a desired effective date, you may search several different ways to find your student, including: first name, last name, department OUC, student/employee ID (the 9-digit numerical number assigned to all students/employees on campus) and/or unity ID (the character-login assigned to each student/employee).

The example below displays a search by a student/employee ID. To see additional examples of searching for students, please refer to the following section: Searching for Students
Once you have found the student you wish to modify a job for, you will check the box in the “Select” column to bring up a list of jobs that student has.

After a few seconds, if a student has a current, pending or future job, this information will show under the search results for the student. Select the job you wish to Modify.

Please note that you MUST enter an Effective date BEFORE you do a search.
After selecting the student and job that you wish to Modify, the "Modify Graduate" button will become active. Select "Modify Graduate" to continue on with the separation.

A student may have multiple jobs, please be careful to select the correct job.
Approval Process

Once a transaction has been submitted by an initiator for approval, it begins two different approval processes - the funding approval process and the human resources approval process. Approvals for both processes are independent of each other, meaning the transaction will go to the Department Funding Representative for approval then the College/Final Funding Approver for approval regardless of where the transaction is at for approvals and/or editing within the human resources process.

Not all changes require a new Terms and Conditions contract to be signed. Changes routed that do not require a new contract will skip the supervisor and student, going from Department HR Representative to College/Final HR Approver in the workflow. Actions that have already been approved by the Dean will not have to be approved again.

With this in mind, the order of the following pages is not the order of the transaction approvals. The approvals process for Modify Graduate transactions is as follows:
**Initiator**

The Initiator and Department HR Representative will have access to update any information for the job. Information listed on the left provides the current jobs details, information on the right provides fields that are open for editing. Items highlighted in red text will require that a new Terms & Condition contract be signed, however, other changes will not and will skip those approvers in the Activity Guide, going from Department HR Representative to College/Final HR Approver in the workflow.

Any information about the job may be edited and multiple fields may be edited at the same time.

Once the information has been updated and verified as correct, the Initiator may click "Approve" to send the transaction to the Department HR Representative.

If the initiator needs to exit the transaction and return at a later time to submit, then s/he may click "Save for Later" and "Exit" to be taken to MyPack Portal's homepage.
Department HR Page

The Department HR Representative will have the same access to update any information on the job as seen above on the Initiator page.

Once the information has been verified as correct, the Department HR Representative may click "Approve" to create the Terms and Conditions contract that will be sent to the supervisor for review and approval.

If the Initiator entered incorrect information and the Department HR Representative would like for the Initiator to correct it, the Department HR Representative can click "Pushback" to send the transaction back to the initiator for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the initiator when the action is pushed back to their level.

If the Department HR Representative needs to exit the transaction and return at a later time to submit, then s/he may click "Save for Later" and "Exit" to go back to MyPack Portal's homepage.

Department Funding Representative

The Department Funding Representative will not be able to make changes to a job’s distribution in a Modification. The current distribution is shown, however it cannot be edited. Distributions can be updated through Distribution Setup. It is recommended that a note is made in the comments section that a Distribution Change is required and a description of the change so that all other approvers are aware of a pending change to the distribution.
Dean
If the transaction causes the student’s aggregate number of hours per week worked across campus to exceed 29 hours per week, or 0.725 FTE (full-time equivalent), then the Dean (or his/her designee) will be routed into the human resources approval process. The Dean or designee will be notified via email that a pending transition is awaiting their approval. In reviewing the pending job, all other positions that the student currently holds across campus will also be listed.

Actions that have already been approved by the Dean will not have to be approved again.

For Dean approval instructions, please see the Dean Approval Section.

Terms & Conditions Contract
The Terms and Conditions contract (if required) is automatically created once the Department HR Representative clicks "Approve." It then routes to the supervisor (the individual listed in the "Supervisor" field on the Initiator and Department HR Admin pages) by notifying the individual via email that a contract is ready for their signature.

After the supervisor signs the Terms and Conditions, the student is notified via email that a contract is ready for their review and signature. The student will click on the link in the email and be taken to the T&C approval page.

For Supervisor or Student Terms & Condition approval instructions. Please see the T&C Approval Section.
College/Final Approvers
College/Final Funding and College/Final HR Approvers are able to view all changes by noting the blue italicized text. This text denotes changes from the original appointment (shown in the left rectangle). Below you can see that the job end date, salary, and FTE have all be adjusted.

College/Final Funding Approver
College/Final Funding Approver will not be able to make changes to a job’s distribution in a Modification. The current distribution is shown, however it cannot be edited. Distributions can be updated through Distribution Setup. It is recommended that a note is made in the comments section that a Distribution Change is required and a description of the change so that all other approvers are aware of a pending change.

College/Final HR Approver
After the financial and human resources processes have been completed, the transaction will route to the College/Final HR Approver for the final review prior to being loaded into the HR System for payroll processing.

Once the College/Final HR Approver has verified the information entered by the Department HR Representative for accuracy and compliance, they may submit the transaction for approval by clicking "Approve."

If the Department HR Representative entered incorrect information, the College/Final HR Approver can click "Pushback" to send the transaction back to the Department HR Representative for editing. Note that
comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.

Once approved by the College/Final HR Approver, the individual will receive a pop-up that the action has been submitted for processing. This means that the action has been submitted but has not yet been accepted into base. The action’s status will be maintained in the Graduate Worklist. If the action does not load properly, an error email will be sent to the College/Final HR Approver.
Separation
To navigate to the Separation screen, follow the path below:
Human Resources Systems > NextGen Graduate System > Separate Graduate

Searching for Students
Before searching of a student, you must enter a desired separation date prior to entering search criteria. The desired separation date must be the day AFTER the last day worked. Entering this date allows the system to check within the Student Information System (SIS) as well as in the HR System to view the student’s academic standing and the student’s current/pending/future jobs.

Once you have entered a desired separation date, you may search several different ways, including: first name, last name, department OUC, student/employee ID (the 9-digit numerical number assigned to all students/employees on campus) and/or unity ID (the character-login assigned to each student/employee).

The example below displays a search by a student/employee ID. To see additional examples of searching for students, please refer to the following section: Searching for Students
Once you have found the student you are looking for, you will check the box in the “Select” column to bring up a list of jobs that student has.

After a few seconds, if a student has a current, pending or future job, this information will show under the search results for the student. Select the job you wish to end.

A student may have multiple jobs, please be careful to select the correct job.
After selecting the student and job that you wish to separate, the "Separate Graduate" button will become active. Select "Separate Graduate" to continue on with the separation.

**Approval Process**

Once a transaction has been submitted by an initiator for approval, it will linearly move to Department HR Representative and then to College/Final HR Approver. If the Initiator is also the Department HR role then they will only have to approve once as the Department HR Representative role will be skipped.

The approval process for a transactions is as follows:
Initiator Page

From the search page, you are taken to the Initiator page of the separation action. On the left, there is the Worklist of approvals needed for a separation (Department HR Representative and College/Final HR Approver). Please make sure pop-up blocker is turned off as this page opens in a new tab.

On this page, you will be allowed to update the separation date that you entered on the search page as well as enter the reason for the separation from the drop down menu. Comments are optional and can be viewable by other approvers through the “Show Comments” button. Comments cannot be edited or deleted and are required for pushbacks.
**Department HR Representative**

The Department HR Representative will have access to update both the separation date and action reason what was entered by the Initiator.

Once the information has been verified as correct, the Department HR Representative may click "Approve."

If the initiator entered incorrect information and the Department HR Representative would like for the initiator to correct it, the Department HR Representative can click "Pushback" to send the transaction back to the initiator for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the initiator when the action is pushed back to their level.
College/Final Human Resources (HR) Approver

Once the College/Final HR Approver has verified the information entered by the Department HR Representative and Initiator for accuracy and compliance, they may submit the transaction for approval by clicking "Approve."

If the Department HR Representative and Initiator entered incorrect information, the College/Final HR Approver can click "Pushback" to send the transaction back to the Department HR Representative for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.

Once approved by the College/Final HR Approver, the individual will receive a pop-up that the action has been submitted for processing. This means that the action has been submitted but has not yet been accepted into base. The action’s status will be maintained in the Worklist. If the action does not load properly, an error email will be sent to the College/Final HR Approver.
Rehire

To navigate to the Rehire screen, follow the path below:
Human Resources Systems > NextGen Graduate System > Rehire Graduate

Searching for Students

Before searching of a student, you must enter a desired effective date prior to entering search criteria. The desired effective date allows the system to check within the Student Information System (SIS) as well as in the HR System to view the student’s academic standing and the student’s most recently terminated jobs.

Once you have entered a desired effective date, you may search several different ways, including: first name, last name, department OUC, student/employee ID (the 9-digit numerical number assigned to all students/employees on campus) and/or unity ID (the character-login assigned to each student/employee).

The example below displays a search by a student/employee ID. To see additional examples of searching for students, please refer to the following section: Searching for Students
Once you have found the student you wish to rehire, you will check the box in the “Select” column to bring up a list of the student’s most recently terminated jobs. This search will only bring up jobs that have a true termination row in the HR system. It will also only provide results for jobs that have terminated within the last calendar year from the effective date.

After a few seconds, the search panels will return results for the student’s terminated jobs. Select the job you wish to rehire the student into.
After selecting the student and job that you wish to rehire the student into, the "Rehire Graduate" button will become active. Select "Rehire Graduate" to continue on with the rehire transaction.

A student may have multiple terminated jobs, please be careful to select the correct job.
**Approval Process**

The workflow in Rehire Graduate will look very similar to New Graduate Appointment. The same routing will take place with the exception of the Initiator role, which is not allowed on rehires. Only Department HR Representatives will be able to start a Rehire action. Once they submit an action, it will be routed to both the Department Funding Representative and Dean (if required) or Supervisor for approval.

Actions in rehire will auto populate most information and will only require a new distribution, employee work location and appointment end dates.
**Department Human Resources (HR) Representative**

The Department HR Representative page will auto-populate with information already in the system from the previous job that was selected on the search page. Only employee location and appointment end dates are required by the Department HR Representative. The Department HR Representative may review and verify all job information and make any necessary edits. Note that the Department HR Representative does not have access to edit any information in the “Distribution Data” section of the transaction as that is reserved for the Department Funding Representative role.

**NOTE:** initiators will not have access to this page and is reserved for Department HR ONLY.
An example of a student’s work location is below.

Job Data information is open for editing and review. All information from the previous job is pulled in except for the “Expected Job End Date” and “Appointment End Date.”

Once the information has been verified as correct, the Department HR Representative may click "Submit for Approval" to create the Terms and Conditions contract that will be sent to the supervisor for review and approval.

If the Department HR Representative needs to exit the transaction and return at a later time to submit, then s/he may click "Save for Later" and "Exit" to be taken to MyPack Portal's homepage.
Department Funding Representative

Once the Department HR Representative submits the transaction, the Department Funding Representative is notified via email that a transaction is at their level for review and approval. They will see the exact same page as the Department HR Representative; however, all of the information will be grayed out for editing except for the distribution information.

The “Distribution Data” section will remain open and will not auto populate the Project ID from the previous job. The Department Funding Approver will need to review information and update with new projects, if applicable. The "Project Description" field is not the actual "Project ID" field. The Project description from the previous job should carry over for review. The Department Funding Representative may correct any information as needed as well as add/delete distribution records via the "+" and "-" buttons to the right of the transaction.

Once the Department Funding Representative has verified the information and made any necessary corrections, they may submit the transaction for approval by clicking "Approve."

If the Department HR Representative entered incorrect information, the Department Funding Representative can click "Pushback" to send the transaction back to the initiator for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.

If the Department Funding Representative needs to exit the transaction and return at a later time to submit, then s/he may click "Save for Later" and "Exit" to be taken to MyPack Portal's homepage.
**Dean**

If the transaction causes the student’s aggregate number of hours per week worked across campus to exceed 29 hours per week, or 0.725 FTE (full-time equivalent), then the Dean (or his/her designee) will be routed into the human resources approval process. The Dean or designee will be notified via email that a pending transition is awaiting their approval. In reviewing the pending job, all other positions that the student currently holds across campus will also be listed.

For Dean approval instructions, please see the [Dean Approval Section](#).

**Terms & Conditions Contract**

The Terms and Conditions contract is automatically created once the Department HR Representative clicks "Approve." It then routes to the supervisor (the individual listed in the "Supervisor" field on the Initiator and Department HR Admin pages) by notifying the individual via email that a contract is ready for their signature. The supervisor will click on the link in the email and be taken to the page below.

After the supervisor signs the Terms and Conditions, the student is notified via email that a contract is ready for their review and signature. The student will click on the link in the email and be taken to the T&C approval page.

For Supervisor or Student Terms & Condition approval instructions. Please see the [T&C Approval Section](#).
**College/Final Funding Approver**

The College/Final Funding Approver will receive an email notification once the Department Funding Representative has approved the transaction. When the College/Final Funding Approver views the transaction, it is the same page as the Department Funding Representative and Department HR Representative have both completed. The only difference is the College/Final Funding Approver cannot edit any information - they can only pushback the transaction for corrections.

Once the College/Final Funding Approver has verified the information entered by the Department Funding Representative for accuracy and compliance, they may submit the transaction for approval by clicking "Approve."

If the Department Funding Representative entered incorrect information, the College/Final Funding Approver can click "Pushback" to send the transaction back to the Department Funding Representative for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department Funding Representative when the action is pushed back to their level.

After the College/Final Funding Approver has approved the transaction, it will remain in hold until the student signs the Terms and Conditions contract. At that point, the transaction routes to the College/Final HR Approver for final approval prior to loading into the HR System for payroll processing.
**College/Final Human Resources (HR) Approver**

After the financial and human resources processes have been completed, the transaction will route to the College/Final HR Approver for the final review prior to being loaded into the HR System.

Once the College/Final HR Approver has verified the information entered by the Department HR Representative for accuracy and compliance, they may submit the transaction for approval by clicking "Approve."

If the Department HR Representative entered incorrect information, the College/Final HR Approver can click "Pushback" to send the transaction back to the Department HR Representative for editing. Note that comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.
Dean Approval

If a transaction causes the student’s aggregate number of hours per week worked across campus to exceed 29 hours per week, or 0.725 FTE (full-time equivalent), then the Dean (or his/her designee) will be routed into the human resources approval process. The Dean or designee will be notified via email that a pending transition is awaiting their approval. In reviewing the pending job, all other positions that the student currently holds across campus will also be listed.

By selecting the link in the email, the Dean approver will be taken to the below page. On this page, the Dean approver will see any current or pending jobs that put the student at or above .75 FTE across campus. At the bottom of the page the Dean approver will be asked to sign off on the position and acknowledge that the college may be responsible for ACA insurance costs, as GSSP does not meet federal requirements.

The Dean approver will be asked to review the page and either “Approve” or “Pushback” the action. If pushed back, the action will be sent back to Department HR Representative for edits.

Any student that exceeds an aggregate FTE of 0.725 across the UNC-System will be offered Affordable Healthcare Act (ACA) health insurance. By approving the exception, the Dean or designee is agreeing to: (1) allow the student to exceed the FTE threshold for graduate students as set by NC State University, and (2) pay any potential health care premiums charged to the department should the student elect to enroll in the ACA healthcare plan.

NOTE: The IRS views students who 30 hours or more per week as fulfilling the role of an employee over fulfilling the role of a student. Therefore, the student will lose their FICA tax exemption and will be charged Social Security and Medicare taxes. See FICA student tax exemption for more information.
Terms & Conditions Approvals

Supervisor – Sign Terms & Conditions Contract
The Terms and Conditions contract is automatically created once the Department HR Representative clicks "Approve." It then routes to the supervisor (the individual listed in the "Supervisor" field on the Initiator and Department HR Admin pages) by notifying the individual via email that a contract is ready for their signature. The supervisor will click on the link in the email and be taken to the page below.

By selecting the link in the email, the supervisor will be taken to the below page. On this page, the supervisor must click on the "View Contract" button to review the Terms and Conditions before they are able to click "Approve and Sign." The Terms and Conditions contract will pop open in a new window. If they do not agree with information provided in the Terms and Conditions, the Supervisor may click "Pushback" to send the transaction back to the Department HR Representative. NOTE: Comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.

The Terms & Condition contract will open in a new window as seen below.

The Terms & Condition contract will open in a new window as seen below.
Please note that the “Approve and Sign” button will not appear unless the Terms & Conditions has been opened.

If everything looks ok, the contract can be signed by selecting the “Approve and Sign” button. Once approved, the student will be notified that their Terms and Conditions contract is ready for signing.
Student – Sign Terms & Conditions Contract

After the supervisor signs the Terms and Conditions contract, the student is notified via email that their contract is ready for their review and signature. The student will click on the link in the email and be taken to the page below.

By selecting the link in the email, the student will be taken to the below page. On this page, the student must click on the "View Contract" button to review the Terms and Conditions before they are able to click "Approve and Sign." The Terms and Condition contract will pop open in a new window. If they do not agree with information provided in the Terms and Condition, the student may click "Pushback" to send the transaction back to the Department HR Representative. NOTE: Comments are required for sending back the transaction, and the comments will appear in the email notification that is delivered to the Department HR Representative when the action is pushed back to their level.

The Terms & Condition contract will open in a new window as seen below.
Please note that the “Approve and Sign” button will not appear unless the Terms & Conditions has been open.

NOTE: If a student does not respond to initial email and does not sign their Terms and Conditions, the department may resend an email to the student through the Graduate Worklist. (Click here to see how to resend a Student’s T&C email.)
Search for a Terms & Conditions Contract

To navigate to the View T&C Document screen, follow the path below:
Human Resources Systems > NextGen Graduate System > View T&C Document

The Department HR Representative, College/Final HR Representative and Supervisor may retrieve historical Terms & Conditions for a student. Contracts can be searched for by name or employee ID.

Search results will bring up all Terms & Condition contracts have been created in the NextGen Graduate Appointment System. Any older Terms & Condition will still be available in the Student Information System (SIS) Student Center, as they are now.
After entering search criteria, select View T&C to pull up the Terms & Condition contract.

To confirm that a contract has been signed, look for the name, unity ID, date and time stamp. A Terms and Condition contract without these features has not been officially signed and accepted in the system.

**Students: Viewing Terms & Conditions in Employee Self Service**

Students will have access to view Terms and Conditions contracts for all appointments entered through the NextGen Graduate Appointment System by logging into MyPack Portal and following this path: Employee Self Service > Payroll and Compensation > View T&C Documents.
Graduate Worklist
To navigate to the Graduate Worklist screen, follow the path below:
Human Resources Systems > NextGen Graduate System > Graduate Worklist

The Graduate Worklist allows you to view all pending, completed and canceled actions that have been processed through NextGen Graduate Appointments. If you are a graduate faculty member without any roles in NextGen, you will only be able to view actions for students that you supervise. For all other roles, you will only be allowed to view actions for which you have department OUC access.

There are many search features within the Graduate Worklist, all of which are defined below in Refining Your Search.

Activity Status
The options in this field are: In Progress, Cancelled, and Completed. This field will always pre-populate in as “In Progress” to show you all actions that are currently active within the OUC you have access to view.
**Refining Your Search**

After selecting the correct Activity Status, or leaving it filled as “In Progress,” you will be able to search by various criteria.

**Search by Particular Action or Graduate Student**

Insert a “Student/Employee ID” number or a “Transaction ID” number (found in the emails you receive) to refine your search by a particular student.

**Search by Type of Action**

Select “Action Request” (Modify a Graduate Appointment, New Graduate Appointment, Rehire a Graduate Assistant, or Separate a Graduate Assistant) to refine your search by type of action. This will pull a list of all actions that meet that criteria and that you have OUC level access to view.

**Search by Department**

Insert a Department OUC (using at least two digits) to refine your search by all action in a particular department or college. You may use your six-digit OUC to search for a specific department, four-digit OUC to search for a more generic department, and a two-digit OUC to search for an entire college.
Search by Current Step (i.e., Workflow Approval Process)
To use this feature, you must first select an Action Request type. In this example, we selected to view all Modification actions, and then the Current Step drop-down becomes active. Here, you may select your role at the top of the page to search for actions that are In Progress and at your level for approval.

Alphabetically & Numerically Sorting Columns
Columns in the Graduate Worklist can be sorted by selecting the column header. To sort actions by their “Start Date”, click the “Start Date” column header and all of your In Progress actions will be sorted by the day the appointment, modification or separation will begin.
Reviewing an Action in the Graduate Worklist

After you have found an action in the Graduate Worklist, you can proceed with one of three actions:

1) Select the Transaction ID to open the action.
2) Cancel an action completely.
3) Select the Details button to view details on the action.

Cancel an Action

If, in the rare occasion, an action needs to be canceled completely from the Graduate Worklist, the action would need to be Pushed Back all the way to the Department HR Representative who can then go into the Graduate Worklist and select the trashcan icon (🗑). After selecting the trashcan, the Department HR Representative will be asked to confirm that they wish to end the action. If confirmed, the action will move from the In Progress list to the Canceled list. (The Graduate Worklist must be refreshed to show the change).

Details

Selecting the Details button on the Graduate Worklist will bring you to the following page which will give you a snapshot of an action’s status. Below is an example of the “Details” page for an action that is still In Progress. In addition to the status of the action, the workflow step can also be viewed next to “Current Item.” This particular action is at College/Final HR Approver for approval as College/Final Funding Approver was the last person to approve the action.

In the “Details” page, you will be able to view all available approvers (View all Item Details), History of the action, and any Attachments.
View All Item Details
The View All Item Details button will take you a new screen that shows all available approvers for each Activity Guide role as well as tell you who approved what role and when.

By selecting different roles on the left, you can see who has approval access to all of the roles. The screenshot below shows an action that is ready to be approved, however, has not yet been approved.
Select Return to go back to the Details screen.

This role was assigned but not approved.

Available approvers for this level.
History
Selecting the History button from the Details screen, will show you a snap shot of the history of the action. This page will show you who approved, saved, or pushed back an action, and when the approval/push back action occurred (date and time stamped). If there are any comments, they will also show here. This page is very similar to what is seen when selecting the “Show Comments” link within a transaction. The image below displays an action wherein all Department and College/Final Funding as well as Department HR roles have been approved.

<table>
<thead>
<tr>
<th>Seq #</th>
<th>Date/Time</th>
<th>Item</th>
<th>Action</th>
<th>By</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>04/29/15 10:30:56AM</td>
<td>College Funding</td>
<td>Approved</td>
<td>by DLEE</td>
<td>Dorothy Lee</td>
</tr>
<tr>
<td>4</td>
<td>04/29/15 10:29:55AM</td>
<td>Department Funding</td>
<td>Approved</td>
<td>by JMMCIINTY</td>
<td>Josh McIntry</td>
</tr>
<tr>
<td>3</td>
<td>04/29/15 9:51:50AM</td>
<td>Dept. HR Admin - Job Details</td>
<td>Approved</td>
<td>by CLSANDY</td>
<td>Chrissy Sandy</td>
</tr>
<tr>
<td>2</td>
<td>04/29/15 9:51:02AM</td>
<td>Dept. HR Admin - Education</td>
<td>Saved</td>
<td>by CLSANDY</td>
<td>Chrissy Sandy</td>
</tr>
<tr>
<td>1</td>
<td>04/29/15 9:49:47AM</td>
<td>Initiator</td>
<td>Submitted</td>
<td>by MGRAY</td>
<td>Michelle Gray</td>
</tr>
</tbody>
</table>
The following is an action that has been approved and pushed back several times.

<table>
<thead>
<tr>
<th>Seq #</th>
<th>Date/Time</th>
<th>Item</th>
<th>Action</th>
<th>Approved by</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>05/01/15 2:07:32PM</td>
<td>Department Funding</td>
<td>Push Back</td>
<td>MMSABATE</td>
<td>Michele Sabatelli</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&gt;&gt; FTE over limit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>05/01/15 2:07:11PM</td>
<td>College Funding</td>
<td>Push Back</td>
<td>MMSABATE</td>
<td>Michele Sabatelli</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&gt;&gt; FTE over limit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>05/01/15 2:00:04PM</td>
<td>Dept. HR Admin - Job Details</td>
<td>Approved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>11</td>
<td>05/01/15 1:59:38PM</td>
<td>Department Funding</td>
<td>Approved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>10</td>
<td>05/01/15 1:58:06PM</td>
<td>Dept. HR Admin - Education</td>
<td>Saved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>9</td>
<td>05/01/15 1:58:43PM</td>
<td>Initiator</td>
<td>Submitted</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>8</td>
<td>05/01/15 1:57:31PM</td>
<td>Dept. HR Admin - Job Details</td>
<td>Push Back</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&gt;&gt; ouc</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>05/01/15 1:52:51PM</td>
<td>Student - Sign Terms &amp; Conditions Contract</td>
<td>Push Back</td>
<td>RGANDAV</td>
<td>Ravi Gandavarapu</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&gt;&gt; I thought this job would be in CALS? Action says CRIED.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>05/01/15 1:44:23PM</td>
<td>Supervisor - Sign Terms &amp; Conditions Contract</td>
<td>Approved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>5</td>
<td>05/01/15 1:41:58PM</td>
<td>College Funding</td>
<td>Approved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>4</td>
<td>05/01/15 1:37:59PM</td>
<td>Department Funding</td>
<td>Approved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>3</td>
<td>05/01/15 1:32:33PM</td>
<td>Dept. HR Admin - Job Details</td>
<td>Approved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>2</td>
<td>05/01/15 1:26:23PM</td>
<td>Dept. HR Admin - Education</td>
<td>Saved</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
<tr>
<td>1</td>
<td>05/01/15 1:26:40PM</td>
<td>Initiator</td>
<td>Submitted</td>
<td>SYDICKEY</td>
<td>Sierra Dickey</td>
</tr>
</tbody>
</table>
Resending a T&C email to a Student
If an action is at a student’s level for the student to sign their Terms and Condition contract, a fourth box will appear below Data Load. This box only appears when an action is waiting on a student and will allow any individual with access to this system to manually resend the Terms and Condition notification email. The individual is also able to send the email to another email address if necessary by editing the email listed under the Email Address column.
Attachments
Attachments, such as funding approval emails or any other back up documentation, can be uploaded at any time during an action. The View/Add Attachment link is located at the bottom of every action just above the comments section.

Selecting the “View/Add Attachment” link will take you to the Attachments Page. If an attachment has been added, it would be listed in the Attachments Table (as seen below). If there are none, the table will be blank.
Add an Attachment

To add a new attachment, select the “Add Attachment” button.

A pop up screen will appear that will ask you to upload a document. Selecting the “Choose File” button will open up your computer’s file management system and you will be able to search and select the file you want to upload.

After selecting the file you wish to upload, select the “Upload” button to attach the document to the action.
After a few moments, the attachment should show up in the Attachments table. Select the “Apply” button to save your changes. Now anyone can see this attachment by selecting the View/Add Attachment button in the action or by selecting the Attachment button on the Detail page of Graduate Worklist (please see the Graduate Worklist section for further instruction).

Select OK to then return to the action.

**Delete an Attachment**

To delete an attachment that you have uploaded, select the trashcan icon (_deposit) located to the right of the attachment that you wish to delete. You will then get a notification confirming that an attachment was deleted. After deleting an action select Apply to save your changes. Then select OK to return to the action.
Saving an Email as an Attachment

To prevent from having to print an email conversation and then scan to attach to your NextGen action. You can create a PDF by doing one of the following:

**Printing to PDF**

While you have the email you want to create a pdf open, select the image of a printer in the upper right hand corner, or select the down arrow to pull up your email options and select “Print”.

When your printer options open, select the down error next to printer name and select “Adobe PDF,” “Microsoft XPS Document Writer,” “Send to Google Docs,” or “One Note.” Any of these options should assist in creating a document that can be uploaded as an attachment.
Searching for Students

If you choose to search by department (Academic Program in New Graduate Appointment), you will see a list of all students in that department’s OUC with a job. Selecting the blue “Photo” link will allow you to see a photo of the student to make sure you are selecting the correct student.

Searching by portions of a student’s name will produce similar results. Searching my unity ID or student/employee ID should result in a single result for the specific student.
Students Job Information

New Graduate Appointments, Modifications, and Separations

After selecting a student, the student’s current, future and pending jobs will appear below the name. Here is a student that had two active graduate appointments.

Below is a student who had a pending action. The pending action would have to be approved or canceled in order for your action to be initiated.
Here is an example of a student with multiple jobs, and the department is trying to rehire this student.
**Warning & Error Messages**

**Pending Job Warning**
When starting an action, you may get a Pending Job warning if there is already an action in the system that is In Progress. You will not be able to continue with your current action until the In Progress action is Completed.

![Pending Job Warning Message](image1)

**Teaching Assistant (TA) Date Warning**
Teaching Assistant should only be hired using semester dates. If a New Hire action is routed using dates other than semester dates, the following error will occur. The action will not move forward until dates are adjusted. *(Teaching Assistant appointments can be separated early if necessary.)*

![TA Date Warning Message](image2)

**Missing Information Warning**
Some fields in an action may be required to move to the next step. If a required field is left empty, you will get a warning that Highlighted fields are required. Please review the action for any red highlighted fields and enter the required information into that field.

![Missing Information Warning Message](image3)
FTE Over .725 Warning

If the FTE of an action (in conjunction with other appointments on campus) brings a student’s FTE above .725, the approver will receive the following warning that the FTE will require College Dean approval. This is only a warning and selecting OK will allow the action to move forward.
**Rehire: FTE Over .725 Warning**

If the FTE is updated during a rehire to increase the student’s FTE bringing them above .725 FTE, the following error will occur. This is only a warning and selecting OK will allow the action to move forward.

![Message](image)

**Salary Range Error**

*Hourly Rate to Low*

If a salary requested is below the minimum hourly rate (minimum wage for North Carolina) then the following error will occur. The salary must be increased before an action can move forward. Frequent mistakes that may cause this error are: incorrect FTE or incorrect Salary.

![Message](image)

*Hourly Rate to High*

If a salary requested is above the maximum hourly rate (please see Graduate School policy for the current rate) then the following error will occur. The salary must be decreased before an action can move forward. Frequent mistakes that may cause this error are: incorrect FTE or incorrect Salary.

![Message](image)
**FTE Over 1.0 Error**
If the requested job for the student brings their total FTE for campus above 1.0 FTE, then the following error will occur. The FTE for a student cannot be above 1.0 FTE and the action will not be able to move forward without an FTE change.
**Emails Generated by NextGen**

This system will generate several emails; therefore, we encourage persons with multiple roles to refer to the Email Sorting section for tips and tricks on how to manage emails generated by the NextGen Graduate Appointments System.

In discussing emails, it’s easiest to refer to the Approval Workflow charts in order to see how emails are generated. Looking at the workflow charts below, an email is generated at each arrow within the chart.

**New Grad Appointment & Modify Graduate**

![Workflow Chart for New Grad Appointment & Modify Graduate]

**Rehire Graduate**

![Workflow Chart for Rehire Graduate]

**Separate Graduate**

![Workflow Chart for Separate Graduate]

When an email is sent, it is sent to all individuals with that role within that OUC(s). For example, an email is generated when the Initiator clicks, “Submit Transaction for Approval,” and sent to all persons within that particular OUC that have the Department HR Representative and Department Funding Representative roles. The emails will include helpful subject lines and include a snapshot of the appointment within the body of the email, which will assist in determining which approver, if there are multiple with the same role, should approve this transaction.
An email is also generated when an individual in a role pushes an action back for editing. For example, when the College/Final Funding Approver pushes an action back to Department Funding Representative, all persons within that OUC with the Department Funding Representative role will receive the push-back email.

**Email Template Examples**

The following templates provide a preview of the emails individuals might receive. The emails sent to the Department HR Representative, Department Funding Representative, College/Final Funding Approver, and College/Final HR Approver have been omitted from the examples in light of the length of this manual.

1. **Email Sent to Initiators Upon Submitting Transaction for Approval**

   **Subject:** REQUEST SUBMITTED: Graduate Assistantship Transaction Submitted

   This is a confirmation that you have submitted the following graduate assistantship transaction for review and approval by your NextGen Graduate Assistantship team in your department/college.

   - Transaction ID: AG00000004
   - Date of Submission: 05-22-2015
   - Effective Date: 05-19-2015
   - Action Description: Hire Graduate Assistant
   - Student/Employee ID: #######
   - Student Name: FirstName LastName
   - Department: 140444-Power America - ECE
   - Comments: N/A

   You will receive another email once all team members have reviewed and approved your transaction, and the transaction has loaded into the HR Payroll system for processing. You can check the status of this transaction at any time by clicking the link below. You can also navigate to the Graduate Worklist at any time to check the status of a transaction.

   For explicit instructions, please refer to the NextGen Graduate Appointment - Training Materials website: https://sites.google.com/a/ncsu.edu/nextgen-grad-system/materials

   If you have any questions, please contact your department’s Graduate Services Coordinator or Human Resources Specialist.
Click the link below to be directed to the pending transaction.
URL HERE

2. Email Sent to Supervisor for Signing Terms & Conditions Contract

**Subject:** ACTION REQUIRED: Graduate Terms & Conditions Contract Needs Your Signature

The following graduate assistantship transaction has been submitted for processing and requires your review and electronic signature of the Terms and Conditions contract.

Transaction ID: AG00000437
Date of Submission: 05-06-2015

Effective Date: 08-16-2015
Action Description: Rehire Grad Assistant

Employee ID: #######
Student Name: FirstName LastName

Department: 131601-Ldshp Plcy & Adult & Higher Ed
Job Title: Graduate Research Asst
Biweekly Salary: 576.92
Hours/Week: 30.00
Comments: N/A

Please click on the link below to access the Terms and Conditions contract or navigate to the Graduate Worklist page to access the document.

By approving and electronically signing this document, this does not mean that the transaction has been submitted for processing into the HR Payroll system. You will receive a final “APPROVED” email once the transaction has received all necessary approvals and loaded into the HR Payroll system.

Click the link below to be directed to the pending transaction.

URL HERE
3. Email Sent to Student for Signing Terms & Conditions Contract

Subject: ACTION REQUIRED: Your Assistantship Terms & Conditions Contract - Sign As Soon As Possible

Your Terms and Conditions Contract is ready for your signature. A brief summary of the terms of the contract is provided below.

Transaction ID: AG00000437
Date of Submission: 05-06-2015

Effective Date: 08-16-2015
Action Description: Rehire Grad Assistant

Employee ID: #######
Student Name: FirstName LastName

Department: 131601-Ldshp Plcy & Adult & Higher Ed
Job Title: Graduate Research Asst
Biweekly Salary: 576.92
Hours/Week: 30.00

Comments: N/A

Please click on the link found at the bottom of this page to review and sign the Terms & Conditions contract.

By approving and electronically signing this document, this does not mean that the transaction has been submitted for processing into the HR Payroll system. You will receive a final “APPROVED” email once the transaction has received all necessary approvals and loaded into the HR Payroll system.

If you have any questions, please contact your department’s Graduate Services Coordinator or Human Resources Specialist.

New Students
Once your appointment has loaded into the HR Payroll system, you will receive an email instructing you to complete an I-9. Every new employee must present documents verifying identity and eligibility to work in the U.S. within the first three days after the hire date. NC State must examine the documents and record the information on the I-9 form. Please complete Section 1 of the I-9 and contact your Graduate Services Coordinator regarding Section 2.
**U.S. Students**
If you are a new student, please read the information and instructions found on this website so that you may receive your first paycheck in a timely manner:

**Foreign National Students**
If you are a new foreign national student, please carefully read the information found at this website: http://www.ncsu.edu/human_resources/payroll/new_foreign_national_employees.php. If you do not read the information found on this website and follow the directions, you will not receive your first paycheck!!

**Current Foreign National Students**
If you are a current foreign national student and the terms of your assistantship are changing (e.g., your assistantship is being extended, you are receiving a change in pay and/or the number of hours per week you work), you must contact the Foreign Tax Office (foreignnationaltax@ncsu.edu; 919-513-3846) to schedule a tax assessment. You should also contact the Office of International Services to ensure they do not require any additional information or documentation (919-515-2961).

Click the link below to be directed to the pending transaction.

URL HERE

4. **Email Sent to Dean for Approving +0.725 FTE Transactions**

**Subject:** ACTION REQUIRED - Dean Approval Needed for Graduate Assistant Exceeding 0.725 FTE

The following graduate assistantship transaction (seen below) has been submitted for your review and approval as the pending transaction will cause the student’s aggregate full-time equivalent (FTE) at NC State University to exceed 0.725 FTE, or 29 hours per week.

Transaction ID: AG00000346
Date of Submission: 05-06-2015
Effective Date: 05-01-2015
Action Description: Hire Graduate Assistant

Employee ID: #######
Student Name: FirstName LastName

Department: 040101-Graduate School-Dean's Office
Job Title: Graduate Research Asst
FTE: 0.375
By approving this action, you are approving an exception in work hours for the student listed above to work beyond the University Guidelines for graduate students, which are 29 hours per week for all aggregate appointments across NC State’s campus. By approving this exception, if the student becomes eligible and enrolls in the Affordable Care Act (ACA) health plan, the department will be billed monthly for the cost of the health insurance for the duration of eligibility.

The Graduate Student Support Plan (GSSP) healthcare coverage does NOT qualify as ACA health care coverage. This is an entirely different plan. More information regarding the ACA Health Plan may be found on the NCSU Benefits Website.

Your approval of this appointment negates the need for you to complete the “Work Hour Exception Form for Students and Part-Time Faculty.”

Please use the link below to review and approve the transaction or navigate to the Graduate Worklist page at anytime to access the transaction. For explicit instructions, please refer to the NextGen Graduate Appointment - Training Materials website: https://sites.google.com/a/ncsu.edu/nextgen-grad-system/materials

If you have any questions, please contact your department’s Graduate Services Coordinator or Human Resources Specialist.

Click the link below to be directed to the pending transaction.

URL HERE
Email Sent to Previous Role(s) if Action Pushed Back

Subject: Pushed Back: *Name* Graduate Assistantship Transaction Pushed Back

The following graduate assistantship transaction has been pushed back to your level for review, corrections and approval.

Transaction ID: AG00000443
Date of Submission: 05-06-2015

Effective date: 08-16-2015
Action Description: Rehire Grad Assistant

Employee ID: ########
Student Name: FirstName LastName

Department: 121101-PhD in Design
Job Title: Graduate Research Asst

Comments: *Person Who Pushed Action Back* - Wrong Hours

You may use the link below to access the transaction or navigate to the Graduate Worklist. For explicit instructions, please refer to the NextGen Graduate Appointment - Training Materials website: https://sites.google.com/a/ncsu.edu/nextgen-grad-system/materials

If you have any questions, please contact your department’s/college’s Power User.

Click the link below to be directed to the pending transaction.

URL HERE
5. Email Sent When Action Approved and Loaded into Payroll (example here is a separation action)

**Subject:** Approved: *Name* Graduate Assistantship Separation Transaction Approved

The following graduate assistantship separation request has been approved and loaded into the HR Payroll system.

Transaction ID: AG00000436

Date of Submission: 05-06-2015

Effective date: 05-02-2015

Action / Description: Separation - End Appt. Temp/Grad Assignment

Employee ID: #######

Student Name: FirstName LastName

Department: 131601-Ldshp Plcy & Adult & Higher Ed

If you have any questions, please contact your department’s Graduate Services Coordinator or Human Resources Specialist.
Email Sorting

Every role in the NextGen Graduate Appointment System will have emails that notify them that there is an action at their level. This may mean that you receive several emails, particularly if you have multiple roles. Below are some suggestions on how to better manage your emails so that you see what you need to without flooding your inbox.

Gmail - Create a Filter

Email filters allow a user to organize there incoming and read emails while maintain an archive to go back to these emails in the future.

It is recommended that you create a filter for each role that you have, sending emails to a folder (Skipping Inbox) that you can either check regularly or then route to a separate inbox (see below for instructions on managing multiple inboxes).

Since all funding email will go to everyone with funding approval access, we recommend sorting your filters so that if you are a grant approver, grant approval emails will route to your inbox and state funding emails get routed to an archive folder.

For more instructions on how to set up a filter, please visit the Google support page: https://support.google.com/mail/answer/6579?hl=en

Gmail - Multiple Inboxes

You can take filters that you have created and manage them either in a folder or in an additional inbox in your email. This will allow you to view your current inbox any folder that you want to keep an eye on.

For detailed instructions on how to set up multiple inboxes and view what it will look like, the following article has good instructions on how to proceed: http://www.howtogeek.com/136198/efficiently-manage-your-gmail-with-the-multiple-inboxes-lab/
**Pop-Up Blockers**

All of the pages in NextGen will open in new windows. If you have a pop-up blocker on your browser, you will not be able to proceed with actions that you have started. Please be mindful of for warnings at the top of your browser window telling you if you have a pop-up blocker active on that browser and change the setting to always allow pop-ups.

**Chrome**

If you see a window with a red X on it in the top right hand corner of your browser, you have a pop-up blocker. Select the box the and below menu bar will appear. Select the always allow options (to keep from having future issues) and the done. After selecting done, click on the window one more time to the open the blue link which was originally blocked. If you changed your settings to always allow, you will not have to do this again.

For the most up-to-date instructions on how to change you Chrome pop-up settings, visit Google’s Support Website: [https://support.google.com/chrome/answer/95472?hl=en](https://support.google.com/chrome/answer/95472?hl=en)
Firefox

If you see a beige bar show up at the top of your screen with an Options button, you have a pop-up blocker on your browser. Select the Options button and then Allow pop-ups to turn popup off. Select the options button again and then the “Show” and then link option to open the page that was blocked. Once you update your settings, you will not have to do this again.

For the most up-to-date instructions on how to change you Firefox pop-up settings, visit Mozzella’s Support Website: https://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting

View PDF in Firefox
support.mozilla.org/en-US/kb/view-pdf-files-firefox-without-downloading-them
MyLinks

To add a page from the NextGen Graduate Appointment System to your "MyLinks" drop-down menu, which stores all of your favorite internal pages within MyPack Portal as well as external favorite websites, follow these instructions:

1. Go to the module/page you want to add to MyLinks. This example will use a module in the HR System but not within the NextGen tool. Once you are on the module/page, click the drop-down arrow beside "MyLinks" and select "Add to MyLinks."

2. Click the arrow directly beside the dropdown menu.

3. A window will pop open. Type the name of the page that you would like to store, then click "Save."

4. The name of the page will now show up on the MyLinks drop-down menu, allowing you to reach the page without having to go through the breadcrumb navigation each time you would like to view this page.
Edit or Deleting MyLinks
To delete or edit a link, follow these instructions:

1. Click on the drop-down menu for MyLinks, select "Edit My Links," and then click the arrow button.

2. Once taken to this page, click on the page/module you would like to edit or delete. It will turn yellow showing it has been selected, and the "Edit" and "Delete" buttons will appear.

3. Click the most appropriate action to achieve your desired outcome. Editing a link will change the name of the page in your MyLinks list. Editing a link will also allow you to move the page into a folder you have created for your favorite links/pages. Deleting a link will obviously delete the link. In this instance, we will delete the link, so once we click "Delete Link" we are taken to a confirmation page.
4. Once you click "Yes - Delete" your link/page will no longer appear on the MyList drop-down menu.