

**NC STATE UNIVERSITY**

**PeopleSoft 9.1**  
**NextGen Graduate Appointment System**  
**User Guide**

The Graduate School  
Rev. March 21, 2022

## Table of Contents

About the NextGen Graduate Appointments System.....	4
NextGen Graduate Appointment System.....	5
Menu Items and Their Descriptions.....	6
NextGen Roles & System Access Requests (SAR).....	7
Approval Process.....	8
“New Graduate Appointment” & “Modify Graduate” Modules .....	8
“Rehire Graduate” Module.....	9
“Separate Graduate” Module.....	9
Activity Guide.....	10
Hiring a Graduate Assistant .....	11
Search Page.....	12
Initiator Page.....	16
Job Title.....	15
Start Date & End Date .....	17
Department.....	17
Annual Salary.....	17
Hours/Week & Full-Time Equivalent (FTE).....	18
Supervisor ID .....	19
Academic Program .....	19
Distribution Data .....	20
Terms and Conditions Comments .....	20
Comments for Approvers .....	20
Save for Later vs. Submit for Approval .....	21
GSSP Information.....	21
Activity Guide.....	22
Approval Process.....	23
Department Human Resources (HR) Representative – Education.....	24
Department Human Resources (HR) Representative - Job Details.....	26
Dean.....	27
Terms & Conditions Contract.....	27
Department Funding.....	28
Attachments .....	29
College/Final Funding Approver .....	29
College/Final Human Resources (HR) Approver .....	30
Modification .....	31

Approval Process.....	34
Initiator .....	35
Department HR Page .....	36
Department Funding Representative.....	36
Dean.....	37
Terms & Conditions Contract.....	37
College/Final Approvers .....	38
<b>Separation .....</b>	<b>40</b>
Approval Process.....	42
Initiator Page .....	43
Department HR Representative .....	44
College/Final Human Resources (HR) Approver .....	44
<b>Rehire .....</b>	<b>45</b>
Approval Process.....	48
Department Human Resources (HR) Representative .....	49
Department Funding Representative.....	51
Dean.....	52
Terms & Conditions Contract.....	52
College/Final Funding Approver .....	53
College/Final Human Resources (HR) Approver .....	54
<b>Dean Approval.....</b>	<b>55</b>
<b>Terms &amp; Conditions Approvals .....</b>	<b>57</b>
Supervisor – Sign Terms & Conditions Contract.....	57
Student – Sign Terms & Conditions Contract.....	59
Search for a Terms & Conditions Contract.....	61
Students: Viewing Terms & Conditions in Employee Self Service .....	62
<b>Graduate Worklist.....</b>	<b>63</b>
Refining Your Search.....	64
Reviewing an Action in the Graduate Worklist.....	66
Cancel an Action.....	66
Details .....	66
View All Item Details.....	67
History .....	69
Resending a T&C email to a Student.....	70
<b>Attachments .....</b>	<b>71</b>
Add an Attachment .....	72
Delete an Attachment.....	73

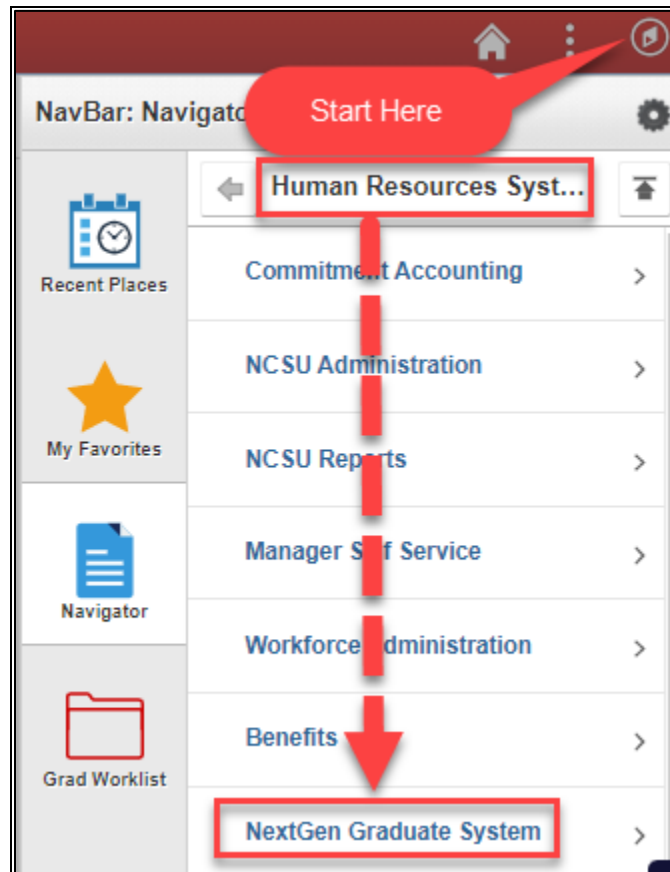
Saving an Email as an Attachment.....	74
Searching for Students .....	75
Students Job Information .....	76
Warning & Error Messages .....	78
Emails Generated by NextGen .....	81
Email Template Examples .....	82
Email Sorting.....	88
Gmail - Create a Filter .....	88
Gmail - Multiple Inboxes .....	88
Pop-Up Blockers.....	89
Chrome .....	89
Firefox .....	90

## 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 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 beginning at the Navigator Tile (upper right hand of the MyPack portal screen: Human Resources System > NextGen Graduate System.



## Menu Items and Their Descriptions

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

Menu Item	Action Description
<b>New Grad Appointment</b>	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.
<b>Rehire Graduate</b>	To initiate actions in this module, an individual must have been assigned the "Department HR Representative" 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.
<b>Modify Graduate</b>	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.
<b>Separate Graduate</b>	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.
<b>Graduate Worklist</b>	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.
<b>View T&amp;C Doc</b>	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.

## 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.

<b><u>NextGen Role Description</u></b>	<b><u>SAR Role</u></b>
Initiator	NCH HR CAMPUS Grad Initiator
College / Final Funding Approver	NCH HR CAMPUS GradCollFunding
Dean	NCH HR CAMPUS GradDean Appr
Supervisor / Graduate Faculty Member	NCH HR CAMPUS GradDeptFacAdmin
Department Funding Representative	NCH HR CAMPUS GradDeptFunding
Department HR Representative	NCH HR CAMPUS GradDeptHRAdmin
College / Final HR Approver	NCH HR CAMPUS GradHRFinalAprv

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.

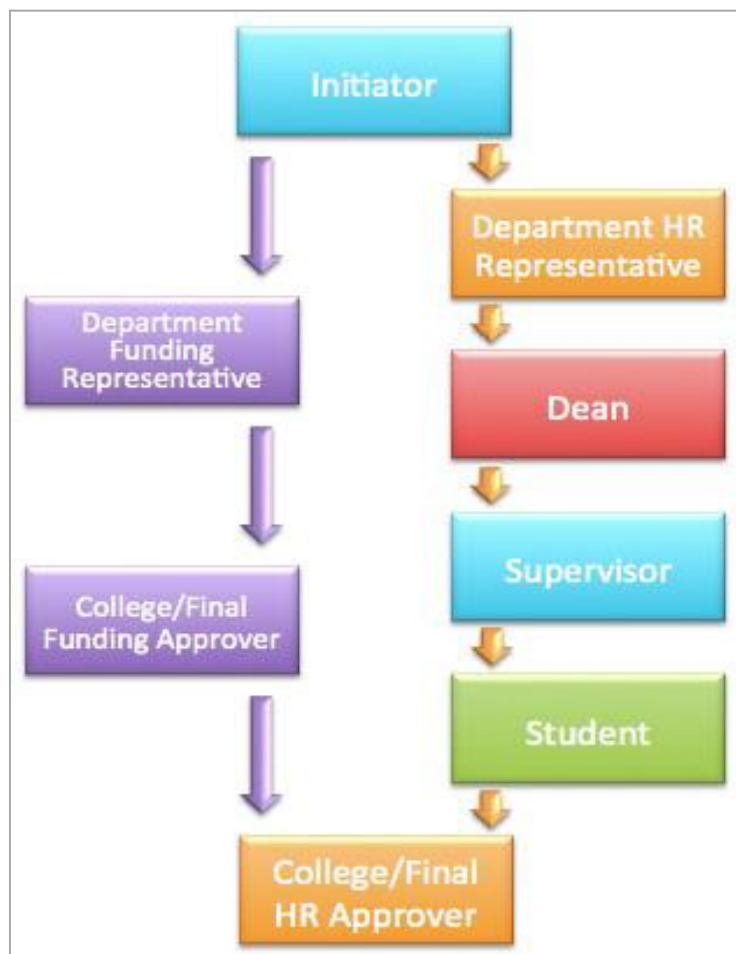
We also highly encourage departments and colleges to provide to all persons using NextGen Graduate Appointments (including graduate faculty members) with the "GSSP Inquiry" role in the Student Information System. This will allow graduate faculty members, initiators, human resources personnel and financial 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

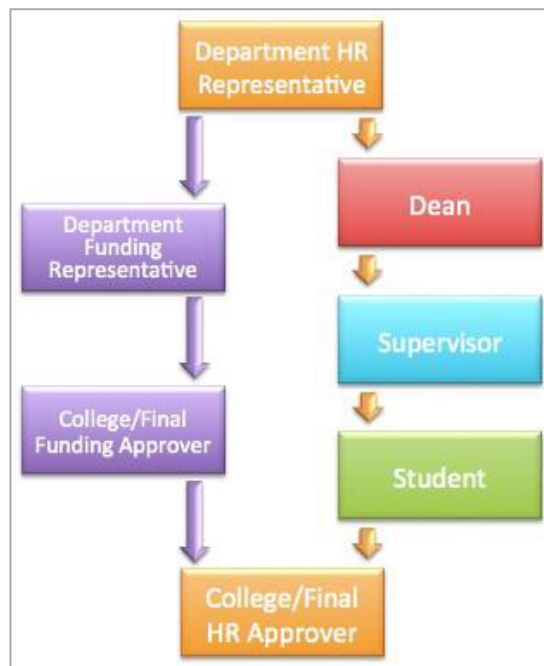
With regards to the "New Graduate Appointment" and "Modify Graduate" modules, a graduate faculty member or other designated initiator will submit a transaction, which will then begin two separate approval processes: (1) a funding approval process, and (2) a human resources approval process. Approvals 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.



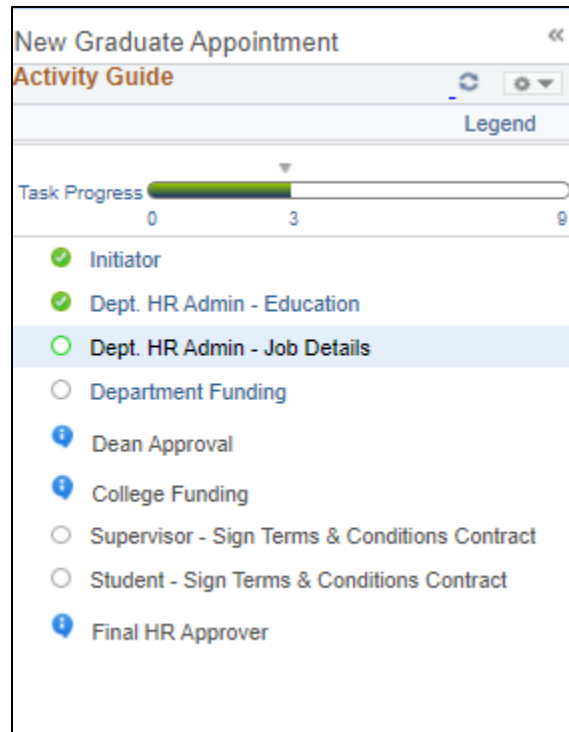
### “Separate Graduate” Module

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.



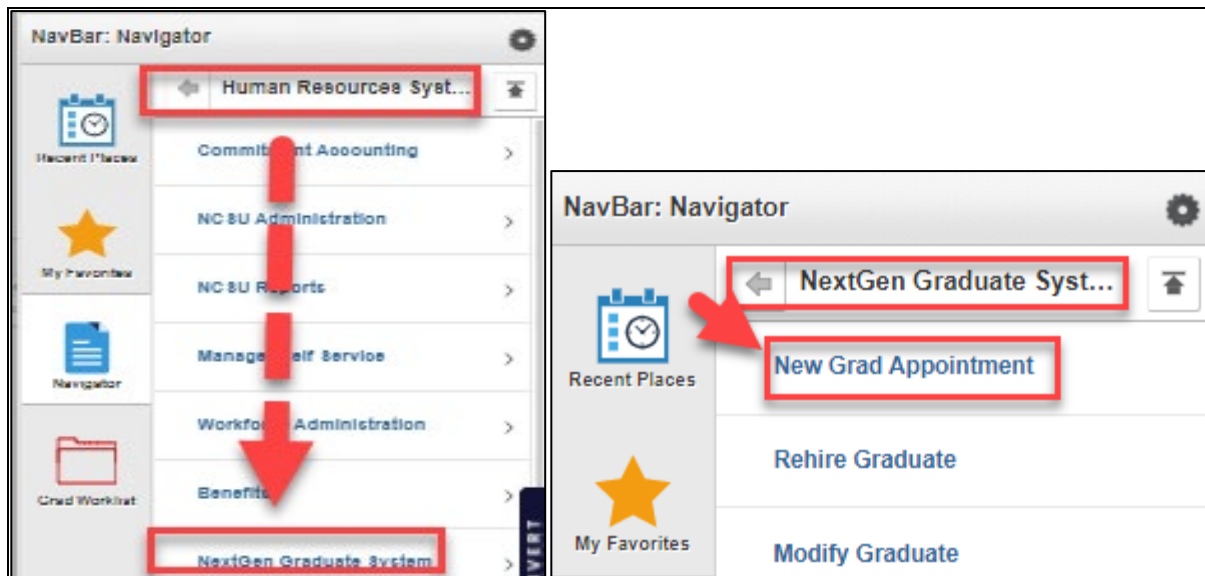
## Activity Guide

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 as shown below beginning with the Navigator Tile: Human Resources Systems > NextGen Graduate System > New Grad Appointment



## Search Page

The screenshot shows the 'MyPack Portal' interface for a 'New Graduate Appointment'. On the left, there is a 'Search' sidebar with the following fields: '\*Desired Start Date:' with a date picker, 'Student/Empl ID:' with a search icon, 'Unity ID:' with a search icon, 'First Name:', 'Last Name:', 'Academic Program:' with a dropdown arrow, and 'As Of Date:' with a date picker showing '11/04/2021'. A note below the date field states: 'Note: As Of Date is used only in development/testing.' At the bottom of the sidebar are 'Search' and 'Clear' buttons. The main area on the right is titled 'New Graduate Appointment'.

### 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](#)

**MyPack Portal**

**Search**  
Desired Start Date:  
11/01/2021  
Student/Empl ID:  
Linda Odhiambo  
Unity ID:  
First Name:  
Last Name:  
Academic Program:  
As Of Date:  
11/04/2021  
Note: As Of Date is used only in development/testing  
Search Clear

**New Graduate Appointment**  
**Search Results**

	Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input type="checkbox"/>				Civil Engineering	GOOD	Female	<a href="#">Photo</a>

Hire Graduate

1 row returned in 0.01 seconds

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.

## MyPack Portal

### New Graduate Appointment

#### Search

Desired Start Date:  
11/01/2021

Student/Empl ID:  
 Linda Odhiambo

Unity ID:

First Name:

Last Name:

Academic Program:

As Of Date:  
11/04/2021

NOTE: As Of Date is used only in development/testing

Search

Clear

1 row returned in 0.01 seconds

#### Search Results

	Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>				Civil Engineering	GOOD	Female	<a href="#">Photo</a>

#### Current Active Jobs, Future Jobs and Pending Actions

Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor	Hours/Week
		008/16/2021	GRD	020101	Exec Vice Chancellor & Provost	A428	Graduate Extension Asst	Stephany Robinson	

Hire Graduate

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](#)).

**MyPack Portal**

**Search**

\*Desired Start Date:  
11/01/2021

Student/Empl ID:  
Linda Odhiambo

Unity ID:

First Name:

Last Name:

Academic Program:

As Of Date:  
11/04/2021  
Note: As Of Date is used only in development/testing.

Search Clear

1 row returned in 0.01 seconds

**New Graduate Appointment**

**Search Results**

Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>			Civil Engineering	GOOD	Female	<a href="#">Photo</a>

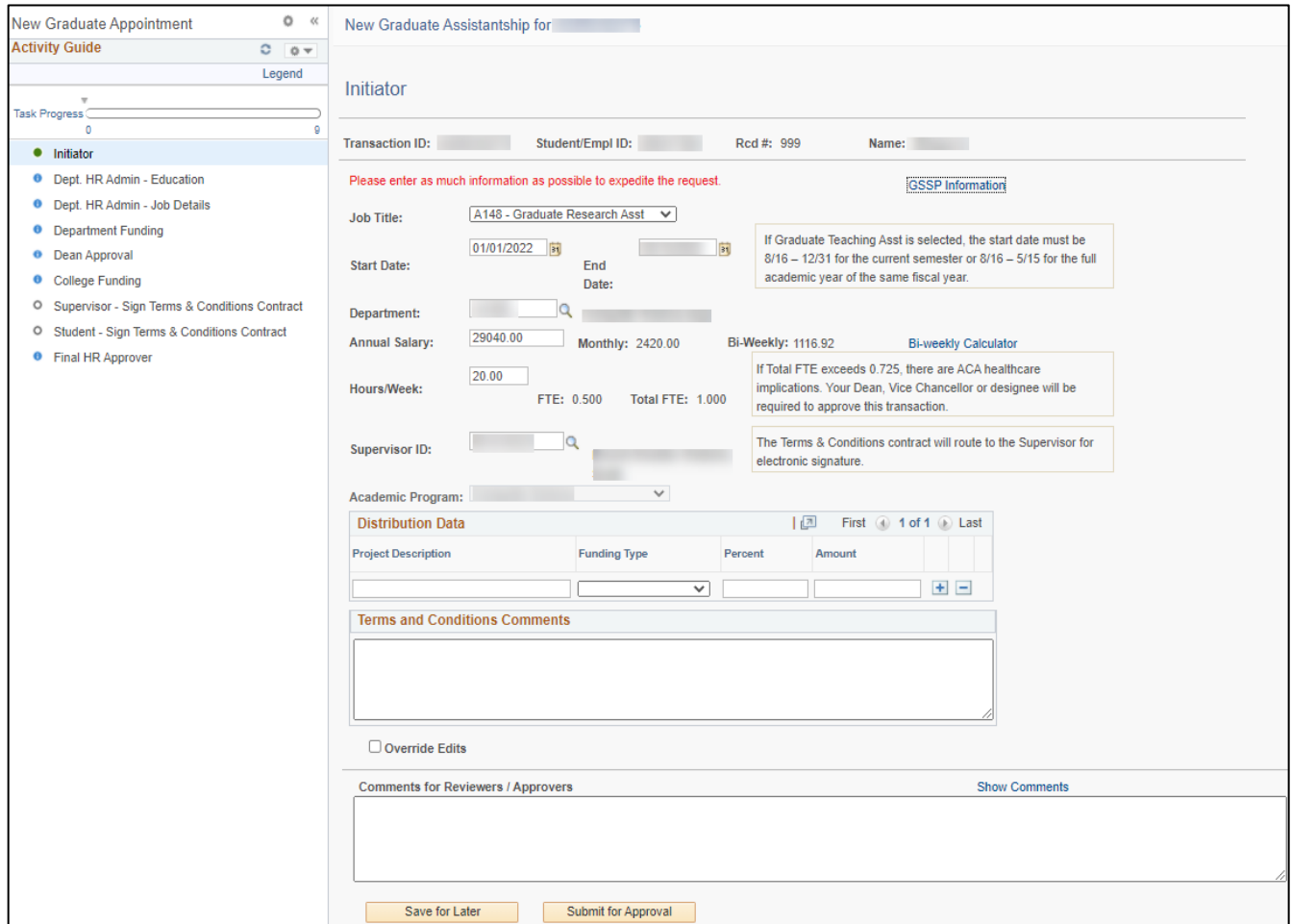
**Current Active Jobs, Future Jobs and Pending Actions**

Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor	Hours/Week
2		008/16/2021	GRD	020101	Exec Vice Chancellor & Provost	A428	Graduate Extension Asst	Stephany Robinson	

Hire Graduate

## 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](#).)



The screenshot displays the 'New Graduate Assistantship for' page. On the left, a sidebar titled 'New Graduate Appointment' contains an 'Activity Guide' with a 'Legend' and a 'Task Progress' bar. The 'Initiator' section is active, showing a list of steps: Dept. HR Admin - Education, Dept. HR Admin - Job Details, Department Funding, Dean Approval, College Funding, Supervisor - Sign Terms & Conditions Contract, Student - Sign Terms & Conditions Contract, and Final HR Approver. The main content area is titled 'Initiator' and includes fields for Transaction ID, Student/Empl ID, Rcd # (999), and Name. A red message states: 'Please enter as much information as possible to expedite the request.' Below this, the 'Job Title' is set to 'A148 - Graduate Research Asst'. The 'Start Date' is '01/01/2022' and the 'End Date' is empty. A note specifies: 'If Graduate Teaching Asst is selected, the start date must be 8/16 - 12/31 for the current semester or 8/16 - 5/15 for the full academic year of the same fiscal year.' The 'Department' is empty. The 'Annual Salary' is '29040.00', with 'Monthly: 2420.00' and 'Bi-Weekly: 1116.92' also shown. A 'Bi-weekly Calculator' link is present. The 'Hours/Week' is '20.00', with 'FTE: 0.500' and 'Total FTE: 1.000' displayed. The 'Supervisor ID' is empty. A note states: 'The Terms & Conditions contract will route to the Supervisor for electronic signature.' The 'Academic Program' is empty. Below this is a 'Distribution Data' table with columns: Project Description, Funding Type, Percent, and Amount. The table is currently empty. A 'Terms and Conditions Comments' section with a text area is also present. At the bottom, there is an 'Override Edits' checkbox, a 'Comments for Reviewers / Approvers' section with a text area, and a 'Show Comments' link. Two buttons at the bottom are 'Save for Later' and 'Submit for Approval'.

New Graduate Appointment

Activity Guide

Legend

Task Progress

0 9

● Initiator

- Dept. HR Admin - Education
- Dept. HR Admin - Job Details
- Department Funding
- Dean Approval
- College Funding
- Supervisor - Sign Terms & Conditions Contract
- Student - Sign Terms & Conditions Contract
- Final HR Approver

New Graduate Assistantship for

Initiator

Transaction ID: Student/Empl ID: Rcd #: 999 Name:

Please enter as much information as possible to expedite the request.

GSSP Information

Job Title: A148 - Graduate Research Asst

Start Date: 01/01/2022 End Date:

If Graduate Teaching Asst is selected, the start date must be 8/16 - 12/31 for the current semester or 8/16 - 5/15 for the full academic year of the same fiscal year.

Department:

Annual Salary: 29040.00 Monthly: 2420.00 Bi-Weekly: 1116.92 Bi-weekly Calculator

Hours/Week: 20.00 FTE: 0.500 Total FTE: 1.000

If Total FTE exceeds 0.725, there are ACA healthcare implications. Your Dean, Vice Chancellor or designee will be required to approve this transaction.

Supervisor ID:

The Terms & Conditions contract will route to the Supervisor for electronic signature.

Academic Program:

Distribution Data

Project Description	Funding Type	Percent	Amount

Terms and Conditions Comments

☐ Override Edits

Comments for Reviewers / Approvers

Show Comments

Save for Later Submit for Approval

## 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 16<sup>th</sup> to May 15<sup>th</sup>), fiscal years (July 1<sup>st</sup> to June 30<sup>th</sup>) or some combination thereof.

Start Date:	<input type="text" value="01/01/2022"/>	End Date:	<input type="text"/>
		<div style="border: 2px solid red; padding: 5px;">If Graduate Teaching Asst is selected, the start date must be 8/16 – 12/31 for the current semester or 8/16 – 5/15 for the full academic year of the same fiscal year.</div>	

**NOTE:** The date limit for Graduate Teaching Assistants, as shown above.

### 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.

Annual Salary:	<input type="text" value="29040.00"/>	Monthly: 2420.00	Bi-Weekly: 1116.92	<a href="#">Bi-weekly Calculator</a>
----------------	---------------------------------------	------------------	--------------------	--------------------------------------

Annual Compensation Calculation Tool for Temporary Staff & Graduate Assistants Paid on the Biweekly Payroll			
Enter the start date and last day worked along with the total amount to be paid in the yellow high-lighted fields. The tool will calculate the annual comp rate based on the data entered.			
Start Date (MM/DD/YY):	<input type="text" value="5/16/2022"/>	Last Day Worked (MM/DD/YY)	<input type="text" value="8/15/2022"/>
Number of Week Days:	66		
Number of Pay Periods:	6.6		
Total to be paid:	<input type="text" value="\$ 8,000.00"/>		
Biweekly Rate:	<input type="text" value="\$ 1,212.12"/>		
Annual Comp Rate:	<input type="text" value="\$ 31,516.00"/>		
<b>NOTE:</b> The HR System will determine an annualized full-time salary based on the "Annual Comp Rate" and standard hours entered. This annualized full-time salary must be greater than or equal to the minimum salary for the Temporary Exempt (TE) job code entered into the HR System . For TE job codes and salary ranges please refer to : <a href="http://www.ncsu.edu/human_resources/hrim/pdf/tempjobcodes.pdf">http://www.ncsu.edu/human_resources/hrim/pdf/tempjobcodes.pdf</a>			

## 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.

New Graduate Appointment

Activity Guide

Legend

Task Progress

0 9

● Initiator

- Dept. HR Admin - Education
- Dept. HR Admin - Job Details
- Department Funding
- Dean Approval
- College Funding
- Supervisor - Sign Terms & Conditions Contract
- Student - Sign Terms & Conditions Contract
- Final HR Approver

New Graduate Assistantship for

Initiator

Transaction ID: Student/Empl ID: Rcd #: 999 Name:

Please enter as much information as possible to expedite the request. [GSSP Information](#)

Job Title: A148 - Graduate Research Asst

Start Date: 01/01/2022 End Date:

Department:

Annual Salary: 29040.00 Monthly: 2420.00 Bi-Weekly: 1116.92 [Bi-weekly Calculator](#)

Hours/Week: 20.00 FTE: 0.500 Total FTE: 1.000

Supervisor ID:

Academic Program:

Distribution Data

Project Description	Funding Type	Percent	Amount

Terms and Conditions Comments

☐ Override Edits

Comments for Reviewers / Approvers [Show Comments](#)

[Save for Later](#) [Submit for Approval](#)

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 designee of their hiring unit due to potential Affordable Care Act 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 can lose their FICA tax exemption and have to pay FICA taxes, and the departments likewise can be charged FICA taxes. 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.

## 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.

Supervisor ID:

The Terms & Conditions contract will route to the Supervisor for electronic signature.

Academic Program: Computer Science

Distribution Data

First

1 of 1

Last

Project Description	Funding Type	Percent	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Terms and Conditions Comments

☐ Override Edits

Comments for Reviewers / Approvers

Show Comments

Save for Later

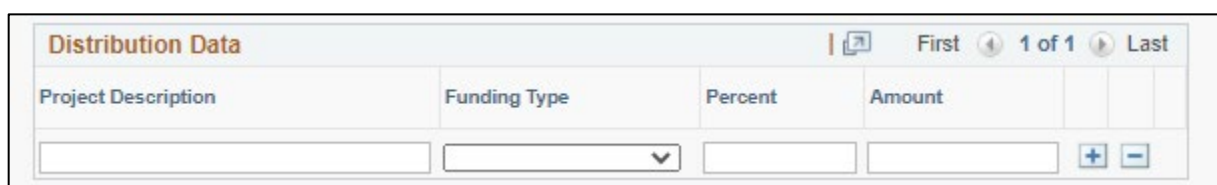
Submit for Approval

## 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.



The screenshot shows a form titled "Distribution Data" with a table structure. The table has four columns: "Project Description", "Funding Type", "Percent", and "Amount". The "Funding Type" column has a dropdown arrow. The "Amount" column has a "+" button and a "-" button. The table is currently empty, showing only the headers.

## 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.



The screenshot shows a form titled "Terms and Conditions Comments" with a large text area for entering comments.

## 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.



The screenshot shows a form titled "Comments for Reviewers / Approvers" with a large text area for entering comments. Below the text area are two buttons: "Save for Later" and "Submit for Approval". A "Show Comments" link is also visible in the top right corner.

### 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."

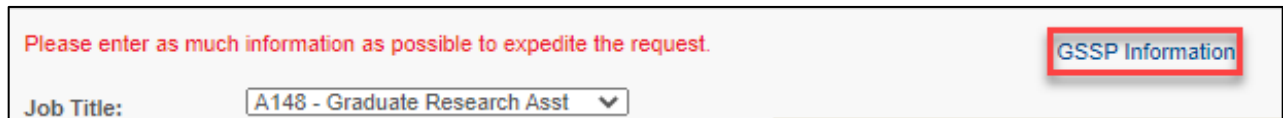


Comments for Reviewers / Approvers [Show Comments](#)

[Save for Later](#) [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.



Please enter as much information as possible to expedite the request.

Job Title: A148 - Graduate Research Asst ▼

[GSSP Information](#)

## GSSP Information Screenshot:

Eligibility
Funding
Tuition
Insurance

**Current Graduate Support Term**

Current Grad Support Term: 2022 Spring Term  
Eligible for Tuition Support? **Ineligible** Student is not full-time in the 2022 Spring Term, and is not eligible for tuition support.

**GSSP Summary**

Term	Class	Tuition Residency	Acad Load	Note	Health Insurance Eligible	In-State Tuition Supp Eligible	Out-State Tuition Supp Eligible	Funding Source	TPC / Fshp FA	Payroll Deduct for Fees?	Previous Master's	GSSP Admit Term
GSSP Term Spring '22	Doctorate	OUT	Less than Half-Time	provisional full-time	Y	Y	Y	Commitment to Fund	<input checked="" type="checkbox"/>	N	Y	Fall '21
Current Term Fall '21	Doctorate	OUT	Enrolled Full-Time		Y	Y	Y	Research/Teaching Assistant	<input checked="" type="checkbox"/>	N		

**Program Stack Information**

Career	Car #	Admit Term	Program	Plan	Status	Load	Units	Load Term	
Graduate	0	Fall '21	CSC	Computer Science	14CSCPHD	Computer Science-PHD	Active	Less 1/2	3.000 Spring '22

**Residency**

Residency: As Of Term  
OUT 2021 Fall Term

International Student

Remission of out-of-state tuition for the 2022 Spring Term is allowed because the following checked conditions are met.  
☒ Less than 2 terms of tuition remission  
☒ International Student Exception  
☐ Tuition Remission Override for Term

**GSSP Eligibility**

Final Term of Eligibility for Tuition Support: 2025 Spring Term  
Classification: Doctorate  
GSSP Admit Term 2218 2021 Fall Term  
Overridden?: ☐

Previous Related Master's: Y  
Overridden?: ☐

Max GRAD Terms: 8  
[Show GRAD terms for student](#)

Eligibility
Override Details
Department Approval Details

Term	Class	Progress Units	Academic Load	Note	Census Units	Census Academic Load	Insurance	In-State	TR	Do Not Prorate
2221	Spring '22	DR	3.00	Less 1/2	0.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2218	Fall '21	DR	10.00	Full-Time	10.00	Full-Time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

New Graduate Appointment

Activity Guide

Legend

Task Progress

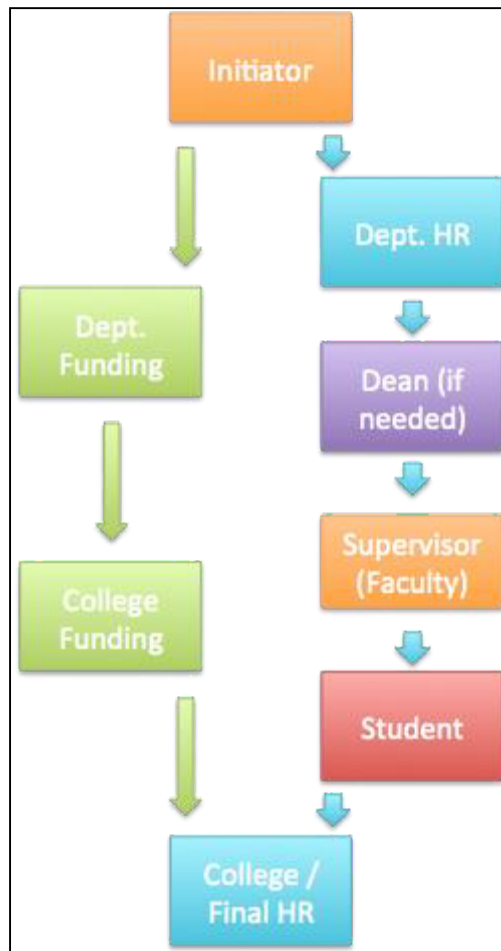
0
2
9

- ☒ Initiator
- ☒ Dept. HR Admin - Education
- ☒ Dept. HR Admin - Job Details
- ☐ Department Funding
- ☐ Dean Approval
- ☐ College Funding
- ☐ Supervisor - Sign Terms & Conditions Contract
- ☐ Student - Sign Terms & Conditions Contract
- ☐ Final HR Approver

## 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.

New Graduate Appointment

Activity Guide

Legend

Task Progress

0 1 9

Initiator

Dept. HR Admin - Education

Dept. HR Admin - Job Details

Department Funding

Dean Approval

College Funding

Supervisor - Sign Terms & Conditions Contract

Student - Sign Terms & Conditions Contract

Final HR Approver

New Graduate Assistantship for AG00238071

Dept. HR Admin - Education

Dept. HR Admin - Education

Transaction ID: AG00238071 Student/Empl ID: Name:

\*Country: USA United States

\*Degree: BA Bachelor Of Arts

\*Issuance Date: 05/01/2017

\*School: 002109 McDaniel College

\*Major Code: 230101 English Language and Literatur

Add

Save

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.

Dept. HR Admin - Education

Dept. HR Admin - Education

Transaction ID: AG00238071 Student/Empl ID: Name:

\*Country: USA United States

\*Degree: BA Bachelor Of Arts

\*Issuance Date: 05/01/2017

\*School: 002109 McDaniel College

\*Major Code: 230101 English Language and Literatur

Add

Save



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.

New Graduate Assistantship for AG00239682

Dept. HR Admin - Education

Dept. HR Admin - Education

Transaction ID: AG00239682 Student/Empl ID: Name:

\*Country: \*Degree: \*Issuance Date: \*School: \*Major Code:

+

-

Add

Save

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.

Save

## 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).

New Graduate Appointment

Activity Guide

Legend

Task Progress

Initiator

Dept. HR Admin - Education

Dept. HR Admin - Job Details

Department Funding

Dean Approval

College Funding

Supervisor - Sign Terms & Conditions Contract

Student - Sign Terms & Conditions Contract

Final HR Approver

New Graduate Assistantship for AG00241414

Dept. HR Admin - Job Details

Dept. HR Admin - Job Details

Transaction ID: AG00241414 Student/Empl ID: Name:

**Person Profile**

Name Prefix: Mr \*Gender: Male

\*First Name: \*Birth Date:

Middle Name: \*Highest Education Level: Not Indic

\*Last Name: \*Birth Country: USA

Name Suffix: Visa Type:

**Home Address**

Country: USA United States

Address Edit Address

**Employee's Work Location / Address**

\*On Campus: On Campus

\*Building number: Tompkins Hall

\*Room Number:

\*Campus Box: COMMUNICATION

**Job Data**

Action - Action Reason: HIR - HGA Hire Graduate Assistant

\*Effective Date: 01/01/2022

\*Expected Job End Date: 05/15/2022

\*Appointment End Date: 05/15/2022

\*Standard Hours: 9.00 FTE: 0.225 Total FTE: 0.825

\*Compensation: 12316.000 Bi-Weekly: 473.690

\*Job Code: A138 Graduate Teaching Asst

\*Department: 160701 Communication

\*Location: 169 Communication

\*Supervisor ID: 000017655 Jameson, Jessica Katz

\*Tax Location Code: NC North Carolina

☐ Encumbrance Override ☐ Encumber to Appt End

**Terms and Conditions Data**

Terms and Conditions Comments:

\*Academic Program: Comm, Rhetoric & Digital Media

During the Spring 2022 Semester you will be responsible to teach COM 354-001, Critical media Making. You will receive \$4500 for your work related to this appointment.

**Distribution Data**

Fiscal Year: 2022 Dept ID: 160701 ☐ Work Against Position Nbr: Total %: 100.000 Tot Amt: 12316.00

**Distribution Details**

Proj Descr: Communication \*Project ID: 201555 \*Account: 51311 Override: ☐ Distrib %: 100.000 Amount: 12,316.000

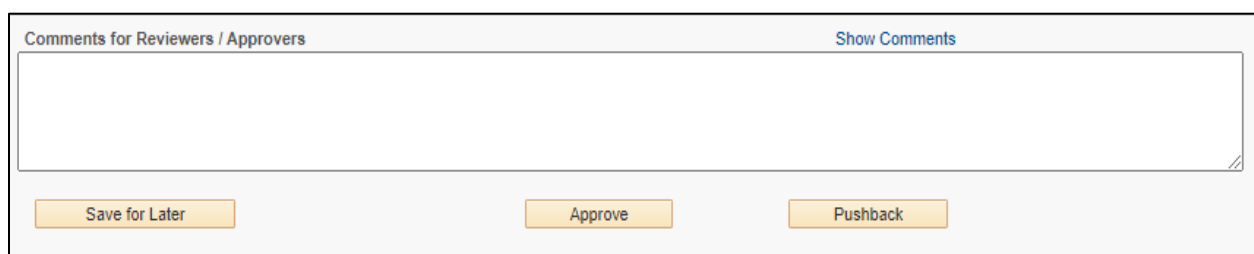
☐ Override Edits ☐ I-S Completed View/Add Attachment

Comments for Reviewers / Approvers Show Comments

Save for Later Approve Pushback

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.



The screenshot shows a web interface for adding comments. At the top, it says "Comments for Reviewers / Approvers" with a "Show Comments" link on the right. Below this is a large, empty text box for entering comments. At the bottom of the interface are three buttons: "Save for Later", "Approve", and "Pushback".

## 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.

**Distribution Data**

Fiscal Year: 2022 Dept ID: 160701 ☐ Work Against Position Nbr: Total %: 100.000 Tot Amt: 12316.00

**Distribution Details** First 1 of 1 Last

Proj Descr: Communication \*Project ID: 201555 \*Account: 51311 Override: ☐ Distrib %: 100.000 Amount: 12,316.000

☐ Override Edits ☐ I-9 Completed **View/Add Attachment**

Comments for Reviewers / Approvers Show Comments

Save for Later Approve Pushback

## 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 this point, the transaction routes to the College/Final HR Approver for final approval prior to loading into the HR System for payroll processing

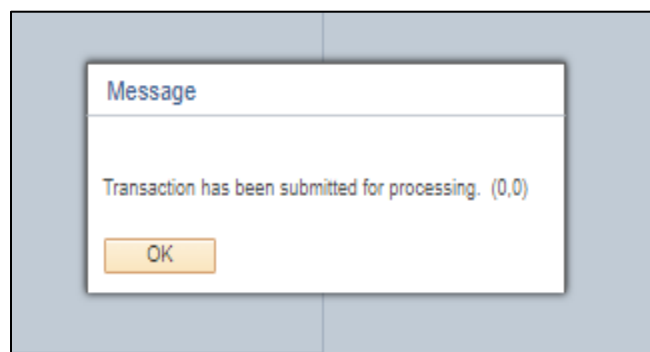
## College/Final Human Resources (HR) Approver

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.

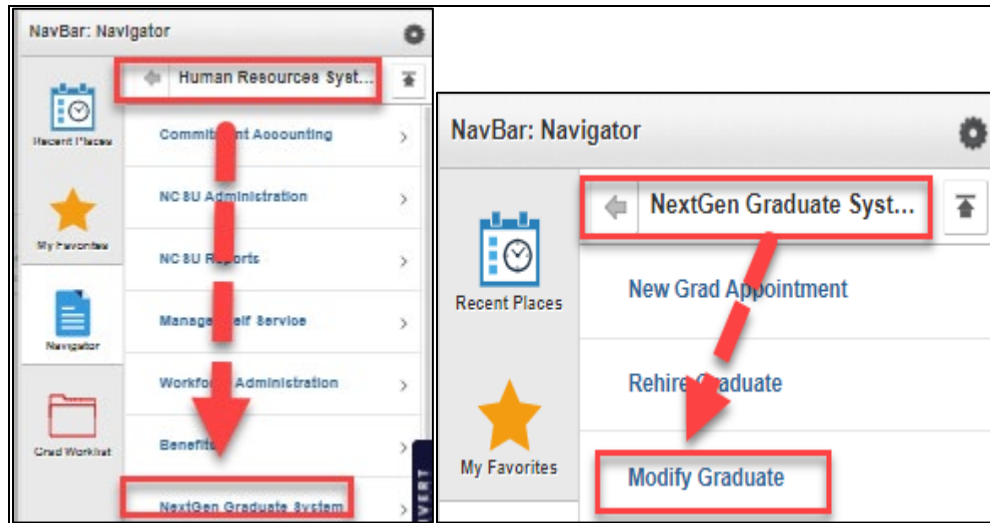
Once approved by the College/Final HR Approver, the approver will receive a pop-up that the action has been submitted for processing. This means that the action has been submitted but has not yet loaded into base. The action's status will be maintained in the Graduate Worklist. If the action does not 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](#)

### Search

**\*Effective Date:**  
11/01/2021

**Student/Empl ID:**

**Unity ID:**

**First Name:**

**Last Name:**

**Department:**

## Modify a Current Graduate Appointment

Please note that you **MUST** enter an Effective date **BEFORE** you do a search.

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.

### Search

**\*Effective Date:**  
11/01/2021

**Student/Empl ID:**

**Unity ID:**

**First Name:**

**Last Name:**

**Department:**

1 row returned in 0.29 seconds

## Modify a Current Graduate Appointment

Search Results						
Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input type="checkbox"/>			Technical Communication	GOOD	Female	<a href="#">Photo</a>

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.

### Search

**\*Effective Date:**  
11/01/2021

**Student/Empl ID:**

**Unity ID:**

**First Name:**

**Last Name:**

**Department:**

1 row returned in 0.29 seconds

## Modify a Current Graduate Appointment

Search Results									
Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo			
<input checked="" type="checkbox"/>			Technical Communication	GOOD	Female	<a href="#">Photo</a>			

#### Current Active Jobs, Future Jobs and Pending Actions

Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor	Hour
<input type="checkbox"/>		10/8/16/2021	GRD	020301	Advanced Analytics	A138	Graduate Teaching Asst	Sarah Egan Warren	



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.

Search

Effective Date:  
11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

Search

Clear

1 row returned in 0.29 seconds

Modify a Current Graduate Appointment

Search Results

Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>			Technical Communication	GOOD	Female	<a href="#">Photo</a>

Current Active Jobs, Future Jobs and Pending Actions

Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor	Hours
<input checked="" type="checkbox"/>		108/16/2021	GRD	020301	Advanced Analytics	A138	Graduate Teaching Asst	Sarah Egan Warren	

Modify Graduate

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

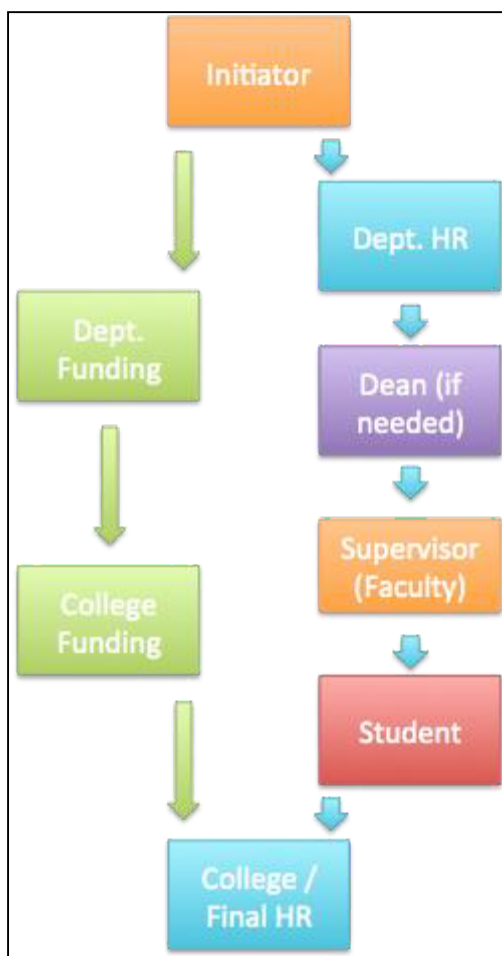
33

## 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.

Modify Graduate Appointment

ActivityGuide

Legend

Task Progress

08

● Initiator

● Dept. HR Admin - Job Details

● Department Funding

● Dean Approval

● College Funding

○ Supervisor - Sign Terms & Conditions Contract

○ Student - Sign Terms & Conditions Contract

● Final HR Approver

Modify Graduate Assistantship for AG00238078

Initiator

Graduate Initiator

Transaction ID: AG00238078 Student/Empl ID: Rod #: 1 Name:

Make Changes effective on this date: 11/01/2021

GSSP Information

Current Information

Department: 020301 Advanced Analytics

Location: 202 Institute for Advanced Analyti

Supervisor ID:

Job Title (job code): A138 Graduate Teaching Asst

Expected Job End Date: 05/15/2022

Appointment End Date: 05/15/2022

Annual Salary: 31200.000

Monthly: 2600.000

Bi-Weekly: 1200.000

Salary Change Amount:

Salary Change Percent:

Standard Hours: 20.00

FTE: 0.500

Encumbrance Override: N

Encumber to Appt End: N

New Information

Department: 020301 Advanced Analytics

Location: 202 Institute for Advanced Analyti

\*Supervisor ID:

Job Title (job code): A138 - Graduate Teaching Asst

Expected Job End Date: 05/15/2022

Appointment End Date: 05/15/2022

\*Typically the same date as Expected Job End Date.

Annual Salary: 31200.00 Bi-weekly Calculator

Monthly: 2600.00

Bi-Weekly: 1200.000

Salary Change Amount: 0.000000

Salary Change Percent: 0.000

Standard Hours: 20.00

FTE: 0.500

Encumbrance Override: ☐

Encumber to Appt End: ☐

Distribution as of Effdt above

Personalize | Find | First 1 of 1 Last

Effective Date	Department	Project/Grant	Account	Distrb %
08/16/2021	020301	301835	51311	100.000

Note: Change to items in RED will generate a new T&C.

☐ Override Edits

## 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.

Distribution as of Effdt above

Personalize | Find |  

First 1 of 1 Last

Effective Date▲	Department	Project/Grant▲	Account	Distrb %
08/16/2021	020301	301835	51311	100.000

Note: Change to items in RED will generate a new T&C.

☐ Override Edits

## 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.

Modify Graduate Assistantship for AG00238078

**Initiator**  
Graduate Initiator

Transaction ID: AG00238078   Student/Empl ID:   Red #: 1   Name:

Make Changes effective on this date: 11/01/2021

GSSP Information

Current Information		New Information	
Department:	020301 Advanced Analytics	Department:	020301  Advanced Analytics
Location:	202 Institute for Advanced Analyti	Location:	202  Institute for Advanced Analyti
Supervisor ID:		*Supervisor ID:	
Job Title (job code):	A138 Graduate Teaching Asst	Job Title (job code):	<b>A148 - Graduate Research As</b>
Expected Job End Date:	05/15/2022	Expected Job End Date:	05/15/2022
Appointment End Date:	05/15/2022	Appointment End Date:	05/15/2022
*Typically the same date as Expected Job End Date.			
Annual Salary:	31200.000	Annual Salary:	<b>34000.00</b> Bi-weekly Calculator
Monthly:	2600.000	Monthly:	<b>2833.33</b>
Bi-Weekly:	1200.000	Bi-Weekly:	<b>1307.692</b>
Salary Change Amount:		Salary Change Amount:	<b>2800.000000</b>
Salary Change Percent:		Salary Change Percent:	<b>8.974</b>
Standard Hours:	20.00	Standard Hours:	20.00
FTE:	0.500	FTE:	0.500
Encumbrance Override:	N	Encumbrance Override:	<input type="checkbox"/>
Encumber to Appt End:	N	Encumber to Appt End:	<input type="checkbox"/>

**Distribution as of Effdt above** Personalize | Find | First 1 of 1 Last

Effective Date	Department	Project/Grant	Account	Distrb %
08/16/2021	020301	301835	51311	100.000

**Terms & Conditions - Additional comments/information section**

Academic Program | Technical Communication

## 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.

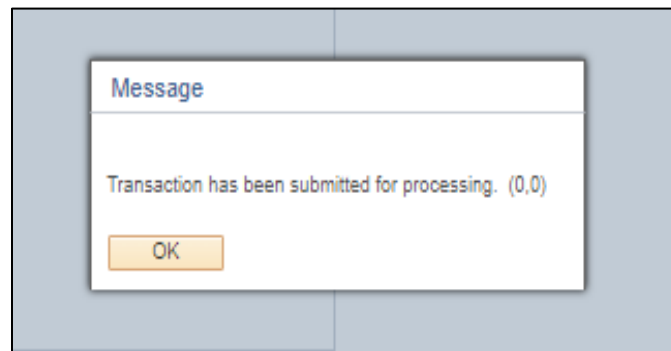
## College/Final HR Approver

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.

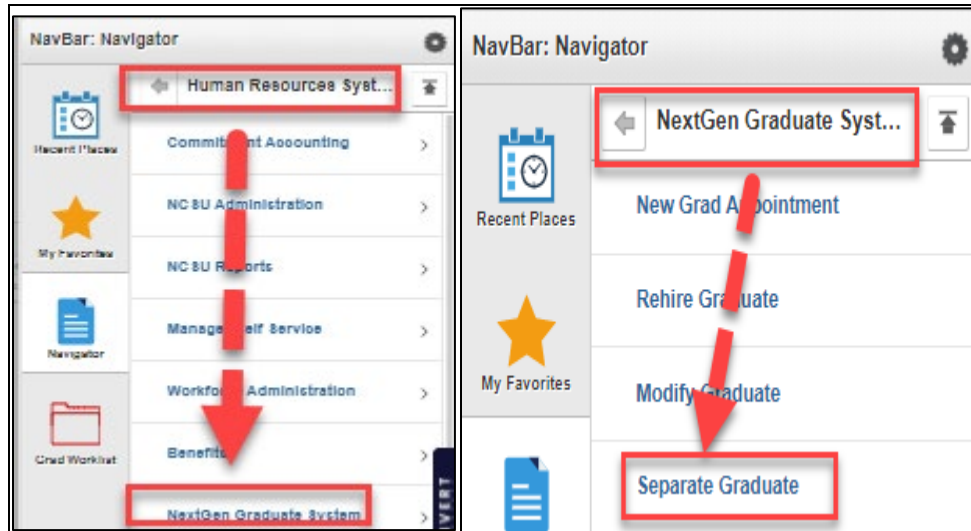
Once approved by the College/Final HR Approver, the individual will receive a pop-up that the action has been submitted for processing. This means that the action has been submitted but has not yet been accepted into base. The action's status will be maintained in the Graduate Worklist. If the action 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 for 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](#)



### Search

\*Separation Date:  
11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

As Of Date:  
11/16/2021

Note: As Of Date is used only in development/testing.

## End Graduate Appointment

Please note that you **MUST**  
enter an Effective date  
**BEFORE** you do a search.

Once you have found the student you are looking for you, you will check the box in the “Select” column to bring up a list of jobs that student has.

### Search

\*Separation Date:  
11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

As Of Date:  
11/16/2021

Note: As Of Date is used only in development/testing.

1 row returned in 0.23 seconds

## End Graduate Appointment

Search Results						
Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>			Technical Communication	GOOD	Female	<a href="#">Photo</a>

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.

### Search

\*Separation Date:  
11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

As Of Date:  
11/16/2021

Note: As Of Date is used only in development/testing.

1 row returned in 0.23 seconds

## End Graduate Appointment

Search Results								
Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo		
<input checked="" type="checkbox"/>			Technical Communication	GOOD	Female	<a href="#">Photo</a>		

#### Current Active Jobs, Future Jobs and Pending Actions

Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor	Hour
<input type="checkbox"/>		108/16/2021	GRD	020301	Advanced Analytics	A138	Graduate Teaching Asst	Sarah Egan Warren	

**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.

Search

\*Separation Date:  
11/01/2021  
Student/Empl ID:  
Unity ID:  
First Name:  
Last Name:  
Department:  
As Of Date:  
11/16/2021  
Note: As Of Date is used only in development/testing

Search Clear

1 row returned in 0.23 seconds

End Graduate Appointment

Search Results

Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>			Technical Communication	GOOD	Female	<a href="#">Photo</a>

Current Active Jobs, Future Jobs and Pending Actions

Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor	Hours
<input checked="" type="checkbox"/>		108/16/2021	GRD	020301	Advanced Analytics	A138	Graduate Teaching Asst	Sarah Egan Warren	

Separate Graduate

## 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:

### Separation



## 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.

Separate Graduate

Activity Guide

Legend

Task Progress 0 3

- Initiator
- Dept. HR Admin
- Final HR Approver

Separate a Graduate Assistant for AG00238083

Initiator

Transaction ID: AG00238083 Student/Empl ID: Rcd #: 1 Name:

Empl Record: 1

Department: 020301 Advanced Analytics

Supervisor: Sarah Egan Warren

Make this separation effective on this date: 11/01/2021

(Enter the day after the last day of work)

Please select the reason for Separation

Separation Reason:

☐ Override Edits

Comments for Reviewers / Approvers Show Comments

Save for Later Submit for Approval

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.

Empl Record: 1

Department: 020301 Advanced Analytics

Supervisor: Sarah Egan Warren

Make this separation effective on this date: 11/01/2021

(Enter the day after the last day of work)

Please select the reason for Separation

Separation Reason: End Appt. Temp/Grad Assignment

☐ Override Edits

Comments for Reviewers / Approvers Show Comments

Student is leaving for another on-campus position.

Save for Later Submit for Approval

## 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.

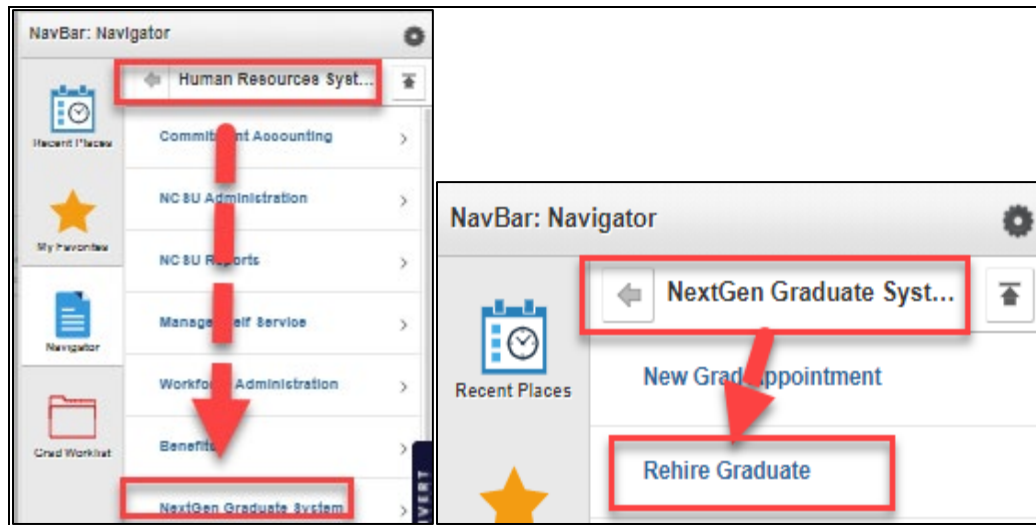
Once approved by the College/Final HR Approver, the individual will receive a pop-up that the action has been submitted for processing. This means that the action has been submitted but has not yet been accepted into base. The action's status will be maintained in the Worklist. If the action does not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

The screenshot displays the 'Separate Graduate' form. On the left, there is a sidebar with an 'Activity Guide' and a 'Legend' section. The 'Task Progress' bar shows 0 out of 2 steps completed. The legend includes 'Initiator' (selected), 'Dept. HR Admin - Not Required', and 'Final HR Approver'. The main form area is titled 'Separate a Graduate Assistant for AG00238083'. It contains fields for 'Transaction ID: AG00238083', 'Empl Record: 1', 'Department: 020301', 'Supervisor: Sarah Egan Warren', and 'Separation Reason: End Appt. Temp'. A 'Make this separation effective on this' field is also present. A 'Please select the reason for Separation' dropdown is visible. A 'Save for Later' button and a 'Submit for Approval' button are at the bottom. A large, semi-transparent 'Message' box is overlaid on the form, stating 'Transaction has been submitted for processing. (0,0)' with an 'OK' button.

## Rehire

To navigate to the Rehire screen, follow the path below:

Human Resources Systems > NextGen Graduate System > Rehire 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 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](#)

### Search

\*Effective Date: 11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

### Rehire a Graduate Assistant

Please note that you **MUST** enter an Effective date **BEFORE** you do a search.

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.

### Search

\*Effective Date: 11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

1 row returned in 0.01 seconds

### Rehire a Graduate Assistant

Search Results						
Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input type="checkbox"/>				GOOD	Male	<a href="#">Photo</a>

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.

### Search

\*Effective Date: 11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

1 row returned in 0.24 seconds

### Rehire a Graduate Assistant

Search Results									
Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo			
<input checked="" type="checkbox"/>				GOOD	Male	<a href="#">Photo</a>			

Current Terminated Jobs and Pending Actions									
Select	Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor
<input type="checkbox"/>			001/01/2020	STW	140388	Civil Engineering Grads & Temp	TSW910	Student Worker, Enrolled@NCSU	Robert Nunez
<input checked="" type="checkbox"/>			108/16/2021	GRD	140388	Civil Engineering Grads & Temp	A148	Graduate Research Asst	Sankarasubrama Arumugam

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.

Search

\*Effective Date:  
11/01/2021

Student/Empl ID:

Unity ID:

First Name:

Last Name:

Department:

Search Clear

1 row returned in 0.24 seconds

Rehire a Graduate Assistant

Search Results

Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>				GOOD	Male	<a href="#">Photo</a>

Current Terminated Jobs and Pending Actions

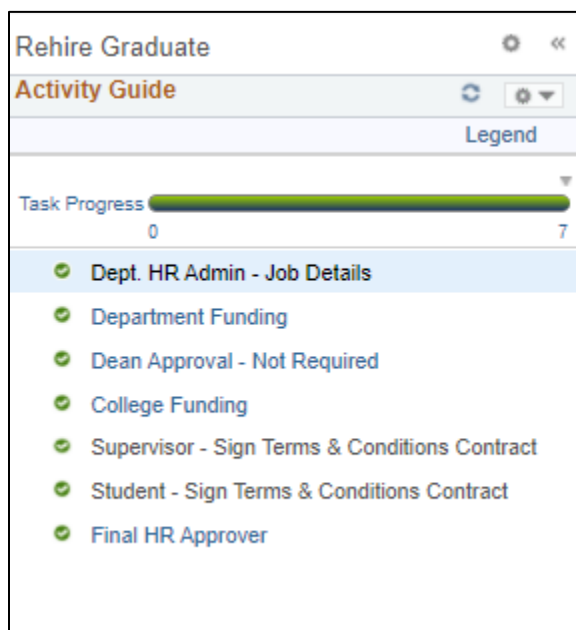
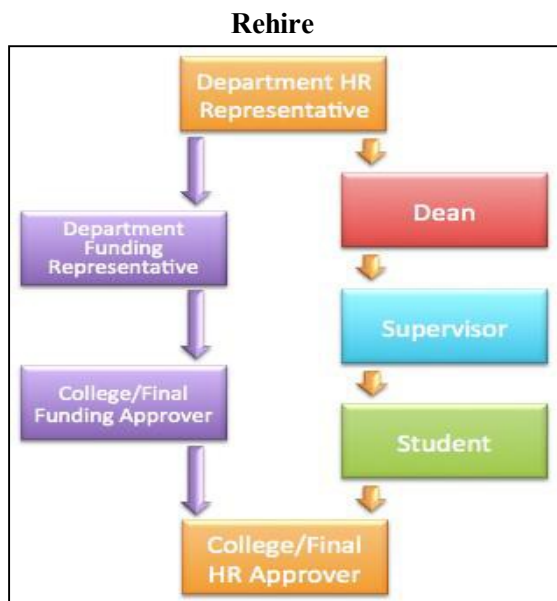
Select	Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor
<input type="checkbox"/>			001/01/2020	STW	140388	Civil Engineering Grads & Temp	TSW910	Student Worker, Enrolled@NCSU	Robert Nunez
<input checked="" type="checkbox"/>			108/16/2021	GRD	140388	Civil Engineering Grads & Temp	A148	Graduate Research Asst	Sankarasubrama Arumugam

Rehire Graduate

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.

Rehire a Graduate Assistant for AG00238086

Dept. HR Admin - Job Details

Dept. HR Admin - Job Details

Transaction ID: AG00238086   Student/Empl ID:   Rcd #:

Person Profile

Name Prefix:

\*First Name:

Middle Name:

\*Last Name:

Name Suffix:

\*Highest Education Level:

\*Birth Country:

Visa Type:

Home Address

Country  United States

Address

Edit Address

Employee's Work Location / Address

\*On Campus:

\*Building number:  Alliance Center

\*Room Number:

\*Campus Box:  INSTITUTE FOR ANALYSIS

Job Data

Action - Action Reason: REH - HGA Rehire Grad Assistant

\*Effective Date:

\*Expected Job End Date:

\*Appointment End Date:

\*Standard Hours:  FTE: 0.500 Total FTE: 1.000

\*Compensation:  Bi-Weekly: 1200.000

☐ Encumbrance Override   Bi-weekly Calculator

\*Job Code:  Graduate Services Assistants

\*Department:  Advanced Analytics

\*Location:  Institute for Advanced Analyti

\*Supervisor ID:

\*Tax Location Code:  North Carolina

☐ Encumber to Appt End

An example of a student's work location is below.

**Employee's Work Location / Address**

\*On Campus: On Campus

\*Building number: 780A Alliance Center

\*Room Number: 00240

\*Campus Box: 7293 INSTITUTE FOR ANALYSIS

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."

**Job Data**

Action - Action Reason: NEH - HGA: Perform Grad Assistant

\*Effective Date: 11/01/2021

\*Job Code: A198 Graduate Services Assistant

\*Expected Job End Date:

\*Department: 020301 Advanced Analytics

\*Appointment End Date:

\*Location: 202 Institute for Advanced Analysis

\*Standard Hours: 20.00 FTE: 0.500 Total FTE: 1.000

\*Supervisor ID: 001112874 Cortley, Richard B

\*Compensation: \$1200.00 Bi-Weekly: 1200.000

\*Tax Location Code: NC North Carolina

☐ Incumbence Override Bi-weekly Calculator ☐ Incumber to Appt End

**Terms and Conditions Data**

\*Academic Program: Technical Communication

Terms and Conditions Comments:

**Distribution Data**

Fiscal Year: 2022 Dept ID: 020301 ☐ Work Against Position Nbr: Total %: 100.000 Total Amt: \$1,200.00

**Distribution Details**

\*Proj Descr:  \*Project ID: \*Account: 51113 Override: ☐ Distrib %: Amount:

\*Proj Descr:  \*Project ID: 202027 \*Account: 51113 Override: ☐ Distrib %: 100.000 Amount: \$1,200.000

☐ Override Edit 1-2 of 2 View/Add Attachment

Comments for Reviewers / Approvers

Show Comments

Save for Later Submit for Approval

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

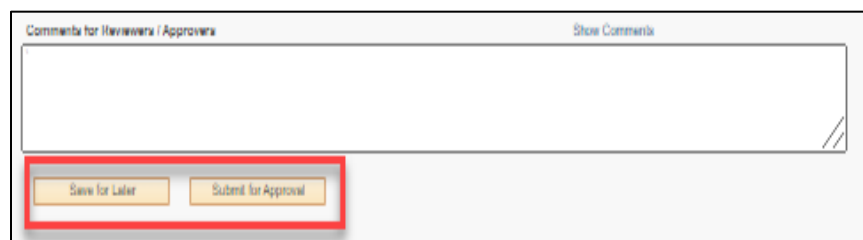
Once the Department HR Representative submits the transaction, the Department Funding Representative is notified via email that a transaction is at their level for review and approval. They will see the exact same page as the Department HR Representative; however, all of the information will be grayed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



Comments for Reviewers / Approvers [Show Comments](#)

## 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.

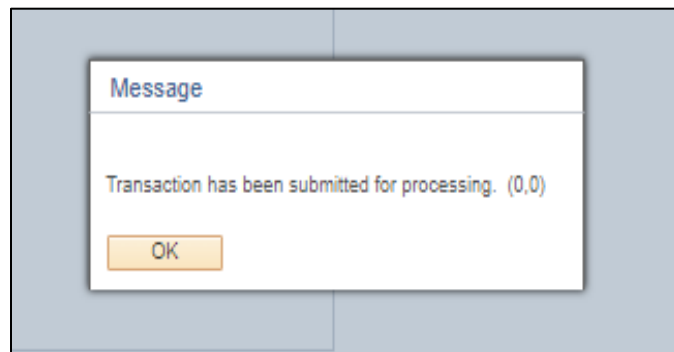
After the College/Final Funding Approver has approved the transaction, it will remain in hold until the student signs the Terms and Conditions contract. At that point, the transaction routes to the College/Final HR Approver for final approval prior to loading into the HR System for payroll processing.

## 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.

**New Graduate Appointment**

**Activity Guide**

Task Progress: 0 1 2 3 4 5

Legend

- Initiator
- Dept. HR Admin - Education
- Dept. HR Admin - Job Details
- Department Funding
- Dean Approval**
- College Funding
- Supervisor - Sign Terms & Conditions Contract
- Student - Sign Terms & Conditions Contract
- Final HR Approver

**New Graduate Assistantship for AG00243172**

**Dean Approval**

Dean Approval

Transaction ID: AG00243172 Student/Emp ID: Name:

**Current and Future Jobs on Campus**

Name	Employee Class Descr	Dept ID	Department	Job Title	Supervisor	Hours per week	Status	Expected End Date
1 Jordan Almeter	Graduate Assistants	170388	Mathematics - Grads & Temps	Graduate Teaching Asst	Seth Sullivan	20.00	Active	12/31/2021

**Job Pending Dean Approval**

Name	Employee Class Descr	Dept ID	Department	Job Title	Supervisor	Hours per week	Start Date	Expected End Date
1 Jordan Almeter	Graduate Assistants	170388	Mathematics - Grads & Temps	Graduate Teaching Asst	Seth Sullivan	20.00	01/01/2022	05/15/2022

By approving this action, I hereby give my approval for this exception in work hours for the student listed above to work beyond the University Guidelines. I understand that by approving this exception, if the student becomes eligible and enrolls in the ACA health plan, all involved departments will be billed proportionally each month 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 NC SU 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".

☐ Override Edits

Comments for Reviewers / Approvers [Show Comments](#)

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 can lose their FICA tax exemption and 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 screenshot displays a web application interface for managing graduate assistant rehires. On the left, an 'Activity Guide' sidebar shows a progress bar and a list of steps: 'Dept. HR Admin - Job Details', 'Department Funding', 'Dean Approval - Not Required', 'College Funding', 'Supervisor - Sign Terms & Conditions Contract' (highlighted with a red box), 'Student - Sign Terms & Conditions Contract', and 'Final HR Approver'. The main content area is titled 'Rehire a Graduate Assistant for [redacted]'. It features a red box around the heading 'Supervisor - Sign Terms & Conditions Contract'. Below this, there are fields for 'Transaction ID', 'Student/Empl ID', 'Red #', and 'Name'. A yellow 'View Contract' button is highlighted with a red box. A blue instruction reads: 'Please review the T&C contract before approving/denying it.' There is an 'Override Edits' checkbox. A 'Comments for Reviewers / Approvers' section includes a 'Show Comments' link and a large text input area. At the bottom, there are 'Approve and Sign' and 'Pushback' buttons.

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.

Rehire a Graduate Assistant for

Supervisor - Sign Terms & Conditions Contract

Sign Terms & Conditions Document

Transaction ID:

Student/Empl ID:

Red #:

0

Name:

View Contract

Please review the T&C contract before approving/denying it.

Comments for Reviewers / Approvers

Show Comments

Approve and Sign

Pushback

## 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.

Rehire Graduate

Activity Guide

Legend

Task Progress

0 5 7

- Dept. HR Admin - Job Details
- Department Funding
- Dean Approval - Not Required
- College Funding
- Supervisor - Sign Terms & Conditions Contract
- Student - Sign Terms & Conditions Contract**
- Final HR Approver

Rehire a Graduate Assistant for

**Student - Sign Terms & Conditions Contract**

Transaction ID: Student/Empl ID: Rod #: 0 Name:

**View Contract**

Please review the T&C contract before approving/denying it.

☐ Override Edits

Comments for Reviewers / Approvers

Approve and Sign Pushback

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

**NC STATE UNIVERSITY**

**Employer Identification Number (EIN): 56-6000756**

**Terms and Conditions for Appointment**

A Graduate Research Assistantship in the Department of Biological Sci Grads and Temps is offered to [redacted] who has been admitted to the Graduate School at NC State University as a student in Comparative Biomedical Sci. For a full definition of graduate assistantships, see the Graduate Administrative Handbook (<http://www.ncsu.edu/grad/handbook>), Chapter 4, Section 4.2. This appointment is subject to all applicable state and federal laws, as well as the policies, regulations and rules of the Board of Governors of the University of North Carolina and North Carolina State University as written and as may be amended from time to time.

The terms of the Graduate Assistantship are a 0.5 FTE at a biweekly salary of \$923.08 prorated for the period 08-01-2021 through 07-31-2022. The appointment is contingent on the availability of funds. For those on teaching assistantships, the appointment is also contingent upon sufficient enrollment.

The conditions for this appointment are stated below. Please read through this statement and sign your name below, indicating that you have read and understand these terms and conditions.

Please note that the “Approve and Sign” button will not appear unless the Terms & Conditions has been opened.

Rehire a Graduate Assistant for [REDACTED]

### Student - Sign Terms & Conditions Contract

---

Transaction ID: [REDACTED] Student/Empl ID: [REDACTED] Rcd #: 0 Name: [REDACTED]

---

[View Contract](#)

Please review the T&C contract before approving/denying it.

---

Comments for Reviewers / Approvers

---

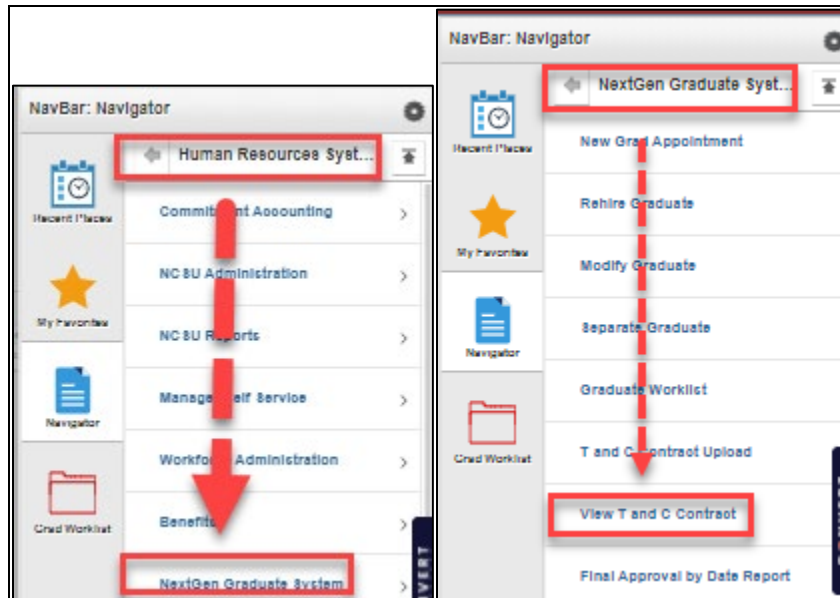
[Approve and Sign](#) [Pushback](#)

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.

## 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 that 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.

**View T&C Contract**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Criteria**

Empl ID  begins with

Empl Record  =

Name  begins with

Last Name  begins with

Second Last Name  begins with

Alternate Character Name  begins with

Middle Name  begins with

☐ Case Sensitive

After entering search criteria, select View T&C to pull up the Terms & Condition contract.

Terms & Conditions Contract

Student / Empl ID

Personalize | Find | View All | | First 1 of 1 Last

Transaction ID	Start Date	Department	Department Description	Supervisor	T & C Status	View T & C	Delete T & C
1 AG00224526	08/16/2021	170688	Physics Grads & Temps	<input type="text"/>	Approved	<a href="#">View T &amp; C</a>	<input type="checkbox"/>

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.

(SWKULLMA) 07-21-2021 03:48 PM

\_\_\_\_\_  
(Department Signature) (Date)

***I have read and understand the terms and conditions for my graduate assistantship.***

(MCGRONSK) 07-22-2021 10:18 AM

\_\_\_\_\_  
(Student Signature) (Date)

## 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.

**NC STATE UNIVERSITY**

Employer Identification Number (EIN): 56-6000756

**Terms and Conditions for Appointment**

A Graduate Research Assistantship in the Department of Biological Sci Grads and Temps is offered to  who has been admitted to the Graduate School at NC State University as a student in Comparative Biomedical Sci. For a full definition of graduate assistantships, see the Graduate Administrative Handbook (<http://www.ncsu.edu/grad/handbook>), Chapter 4, Section 4.2. This appointment is subject to all applicable state and federal laws, as well as the policies, regulations and rules of the Board of Governors of the University of North Carolina and North Carolina State University as written and as may be amended from time to time.

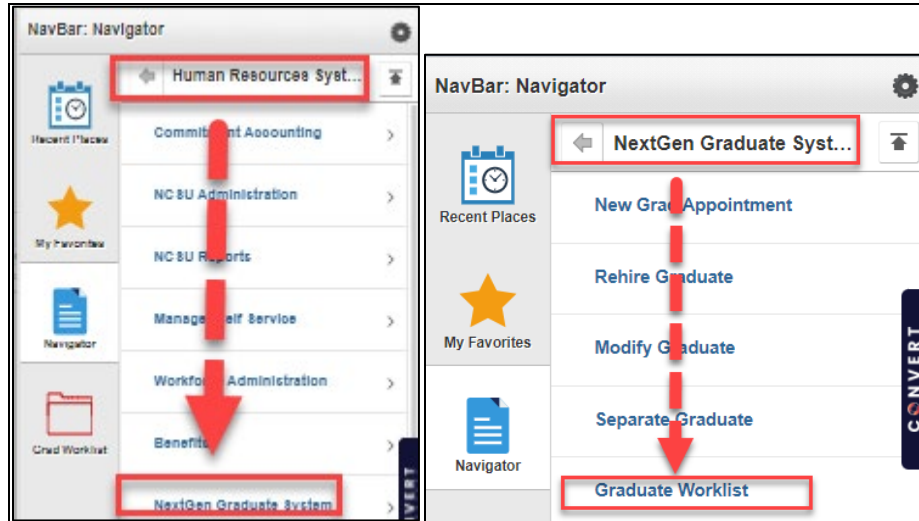
The terms of the Graduate Assistantship are a 0.5 FTE at a biweekly salary of \$923.08 prorated for the period 08-01-2021 through 07-31-2022. The appointment is contingent on the availability of funds. For those on teaching assistantships, the appointment is also contingent upon sufficient enrollment.

The conditions for this appointment are stated below. Please read through this statement and sign your name below, indicating that you have read and understand these terms and conditions.

## 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. 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.

The screenshot shows the 'Graduate Worklist' search criteria form. It includes fields for Transaction ID, Student/Empl ID, Empl Class, Action Status, Department, Action Request, and Current Step. There are Search and Clear buttons at the bottom right.

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.

Graduate Worklist

Search Criteria

Transaction ID

Student/Empl ID

Empl Class

Action Status

Department

Action Request

Current Step

Search  Clear

### 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.

Graduate Worklist

Search Criteria

Transaction ID

Student/Empl ID

Empl Class

Action Status  In Progress

Department

Action Request

Current Step

Modify Graduate Assistantship

New Graduate Assistantship

Rehire a Graduate Assistant

Separate a Graduate Assistant

Search  Clear

### 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.

Graduate Worklist

Search Criteria

Transaction ID

Student/Empl ID

Empl Class

Action Status  In Progress

Department  170788 Chemistry Grads & Temps

Action Request

Current Step  \*\* All \*\*

Search  Clear



### 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.

Graduate Worklist

Search Criteria

Transaction ID  Action Status  Action Request

Student/Empl ID  Department

Empl Class Graduate Assistants

Current Step

- \*\* All \*\*
- College Funding
- Dean Approval
- Department Funding
- Dept. HR Admin - Job Details
- Final HR Approver
- Initiator
- Student - Sign Terms & Conditions Contract
- Supervisor - Sign Terms & Conditions Contract

### 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.

Graduate Worklist

Search Criteria

Transaction ID  Action Status  Action Request

Student/Empl ID  Department  Current Step

Empl Class Graduate Assistants

218 rows returned

Results

Transaction ID	Action Request	Student/Empl ID	Name	Department	Job Title	Start Date	Entered By	Current Step	Action Status	Action	Last Update Date/Time	by	Details
1 AG00236370	New Graduate Assistantship			172288 - Biological Sci Grads and Temps	A148 - Graduate Research Asst	09/04/2021		Department Funding	In Progress	Approved	09/09/21 3:29:25PM	MERUFFIE	
2 AG00238950	New Graduate Assistantship			172288 - Biological Sci Grads and Temps	A148 - Graduate Research Asst	10/01/2021		Final HR Approver	In Progress	Approved	11/16/21 4:04:15PM	DJWALLIS	


## 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.

Results												Personalize	Find	View 100	First	1-100 of 218	Last
Transaction ID	Action Request	Student/Emp ID	Name	Department	Job Title	Start Date	Entered By	Current Step	Action Status	Action	Last Update Date/Time	by	Details				
1 AG00239920	Rehire a Graduate Assistant			196001 - Dept-Population Health/Pathobi	A140 - Graduate Research Asst	10/16/2021		Dept. HR Admin - Job Details	In Progress	Push Back	10/15/21 12:02:09PM	AJSMAC02					
2 AG00244216	Modify Graduate Assistantship			106901 - Thermal Protection & Comfort C	A140 - Graduate Research Asst	01/01/2022		Student - Sign Terms & Conditions Contract	In Progress	Approved	11/29/21 10:30:04AM	DPOVENS					

### 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.

Request Status

Transaction ID: AG00239920
Student/Empl ID:
Rcd #: 0
Name:

Activity Guide Status

Status: In Progress
% Complete: 0

Current Item: Final HR Approver
Status: Assigned
View All Item Details

Latest Activity

Item: Department Funding
Date/Time: 10/15/21 12:02:09PM
Attachments
History

Action: Push Back
User ID:

Comment: Please delete the extra line

Data Load

Process Monitor
Run

Run Status Code: Not Run

Severity Filter:
Warning
Error
Information

## 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.

Request Status

Transaction ID: AG00239920
Student/Empl ID:
Rcd #: 0
Name:

Dept. HR Admin - Job Details

Department Funding
Dean Approval
College Funding
Supervisor - Sign Terms & Conditions Contract
Student - Sign Terms & Conditions Contract
Final HR Approver

Item Details

Title Dept. HR Admin - Job Details
Status Progress

Complete Date 10/15/2021
Completed By KJSAPKO

Item ID DEPTHREHI1\_JARGRDREHL294722

Assignments

Assign Type Assigned To

1 Role NCH HR CAMPUS GradDeptHRAAdmin
2 Role NCH HR EAS Func Team

Update

User List

KBMITCHE - Karen Mitchell - kbmitch@ncsu.edu
KJSAPKO - Katherine Sapko - kjsapko@ncsu.edu
KLWILSO7 - Katherine Wilson - klwilso7@ncsu.edu
MACOLE8 - Maranna Cole - macole8@ncsu.edu
SLCRAVEN - Sarah Ann Craven - slcraven@ncsu.edu

Include Dept 001

This step was completed by KJSAPKO

Available approvers for this level.

Return

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.

## Request Status

Transaction ID: AG00250232

Student/Empl ID:

Rcd #: 0

Name:

### Initiator

Dept. HR Admin - Job Details

Department Funding - Not Required

Dean Approval - Not Required

College Funding - Not Required

Supervisor - Sign Terms & Conditions Contract

Student - Sign Terms & Conditions Contract

Final HR Approver

### Item Details

Title Final HR Approver Status Assigned

Complete Date  Completed By

Item ID FINAL\_HRII7\_NC\_JAR\_MOD306383

### Assignments

	Assign Type	Assigned To
1	Role NCH HR CAMPUS GradHRFinalAprv	
2	Role NCH HR EAS Func Team	

### User List

☐ Include Dept 001

Select Return to go back to the Details screen.

## 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.

### Request Status

Transaction ID: AG00239920   Student/Empl ID:   Rcd #: 0   Name:

Activity Guide Status

Status: In Progress   % Complete: 0  
Current Item: Final HR Approver   Status: Assigned   [View All Item Details](#)

Latest Activity

Item: Department Funding   Date/Time: 10/15/21 12:02:09PM   [Attachments](#)  
Action: Push Back   User ID:   [History](#)  
Comment: Please delete the extra line

Data Load

[Process Monitor](#)   [Run](#)

Run Status Code: Not Run

Severity Filter:   ☐ Warning   ☒ Error   ☐ Information

### Request Status

Transaction ID: AG00239920   Student/Empl ID:   Rcd #: 0   Name:

Seq #	Date/Time	Item	Action		
4	10/15/21 12:02:09PM	Department Funding	Push Back	by AJSIMMO2	- Anthony Simmons
	>>	Please delete the extra line			
3	10/15/21 11:20:19AM	Student - Sign Terms & Conditions Contract	Approved	by ADREED2	- Amber Reed
2	10/15/21 10:33:14AM	Supervisor - Sign Terms & Conditions Contract	Approved	by CMTHERIO	- Casey Theriot
1	10/15/21 9:59:42AM	Dept. HR Admin - Job Details	Submitted	by KJSAPKO	- Katherine Sapko

[Return](#)

## 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.

### Request Status

Transaction ID: AG00239920   Student/Empl ID:   Rcd #: 0   Name:

**▼ Activity Guide Status**

Status:	In Progress	% Complete:	0
Current Item:	Final HR Approver	Status:	Assigned

[View All Item Details](#)


**▼ Latest Activity**

Item:	Department Funding	Date/Time:	10/15/21 12:02:09PM	<a href="#">Attachments</a>
Action:	Push Back	User ID:	AJSIMMO2	<a href="#">History</a>
Comment:	<div>Please delete the extra line</div>			

**▼ Data Load**

[Process Monitor](#)   [Run](#)

Run Status Code: Not Run

Severity Filter:   ☐ Warning   ☒ Error   ☐ Information   

**▼ Student Emails**

Email Source	Description	Email Address	Email Status	Resend Student Email
1 STUDENT	To Student	<div></div>	Sent	<div>Resend Student Email</div>

## 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.

☐ Override Edits ☐ I-9 Completed [View/Add Attachment](#)

Comments for Reviewers / Approvers Show Comments

Save for Later

Approve

Pushback

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.

New Graduate Assistantship for AG00243970

Final HR Approver

As Of Date: 11/29/2021

Final HR Approver

Transaction ID: AG00243970 Empl ID:

Name:

Empl Class: Graduate Assistants

Add Attachment

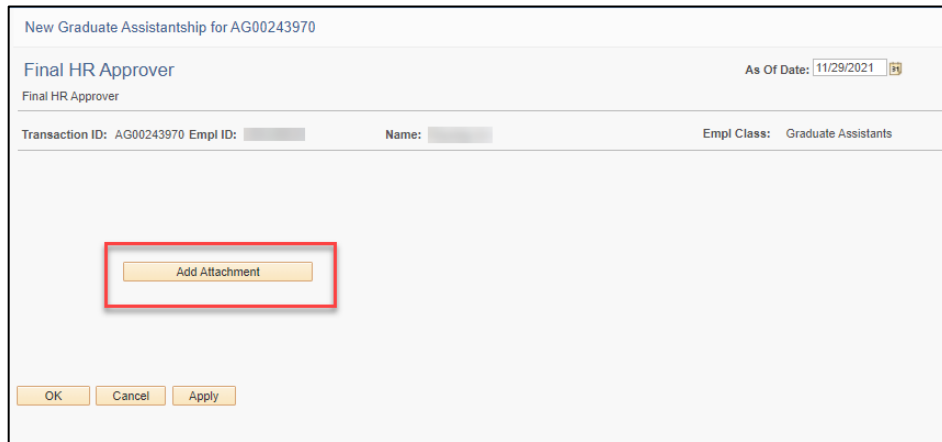
OK

Cancel

Apply

## Add an Attachment

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



New Graduate Assistantship for AG00243970

Final HR Approver As Of Date: 11/29/2021

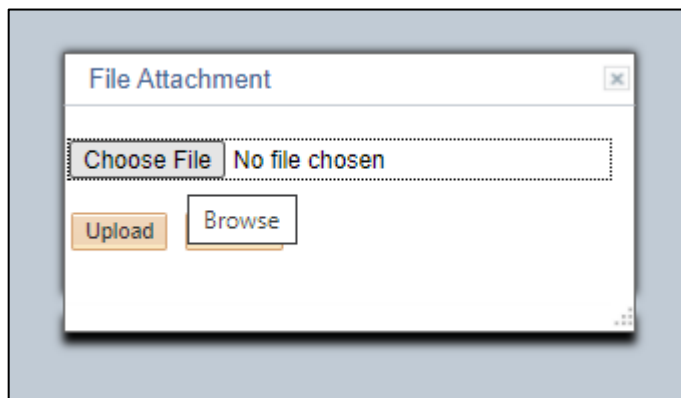
Final HR Approver

Transaction ID: AG00243970 Empl ID:  Name:  Empl Class: Graduate Assistants

**Add Attachment**

OK Cancel Apply

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

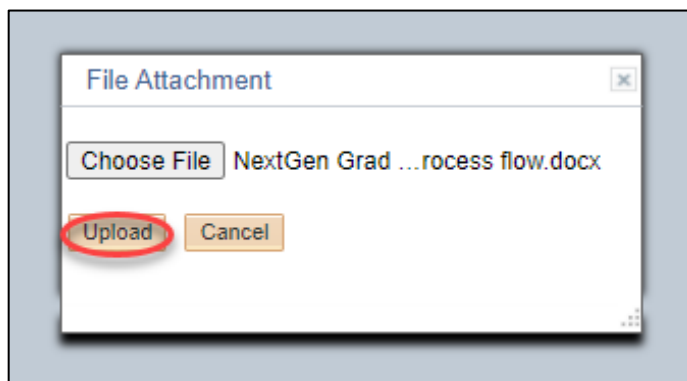


File Attachment

**Choose File** No file chosen

Upload Browse

After selecting the file you wish to upload, select the “Upload” button to attach the document to the action.



File Attachment

**Choose File** NextGen Grad ...rocess flow.docx

**Upload** Cancel



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).

New Graduate Assistantship for AG00245670

Dept. HR Admin - Job Details
  
Dept. HR Admin - Job Details


Transaction ID: AG00245670    Empl ID:    Name:

Attachments			
Sequence Number	GEA_Instructions.pdf	Created By	Created Datetime
1	GEA_Instructions.pdf	RBCORLEY	12/09/2021 4:01PM

OK    Cancel    **Apply**

Select OK to then return to the action.

## Delete an Attachment

To delete an attachment that you have uploaded, select the trashcan icon (  ) 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.

New Graduate Assistantship for AG00245670


Dept. HR Admin - Job Details
  
Dept. HR Admin - Job Details

Transaction ID: AG00245670    Empl ID:

Attachments			
Sequence Number	GEA_Instructions.pdf	Created By	Created Datetime
1	GEA_Instructions.pdf		

OK    Cancel    Apply

Message
  
DeleteAttachment succeeded (137,10)
  
The DeleteAttachment() call succeeded.
  
OK



## 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 arrow 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.

Search

\*Effective Date:  
01/01/2022  
Student/Emp ID:  
Unity ID:  
First Name:  
Last Name:  
Department:  
170301  
Search Clear  
37 rows returned in 9.47 seconds

Rehire a Graduate Assistant

Search Results

	Student/Emp ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Female	<a href="#">Photo</a>
<input type="checkbox"/>				Operations Research	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Biomathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Female	<a href="#">Photo</a>
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Biomathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Male	<a href="#">Photo</a>

Rehire Graduate

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 no active graduate appointments.

**Rehire a Graduate Assistant**

**Search Results**

	Student/Empl ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input checked="" type="checkbox"/>				Mathematics	GOOD	Female	<a href="#">Photo</a>
<input type="checkbox"/>				Operations Research	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Biomathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Female	<a href="#">Photo</a>
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Biomathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Male	<a href="#">Photo</a>

**Current Terminated Jobs and Pending Actions**

Select	Student/Empl ID	Empl Record	Effective Date	Empl Class	Dept ID	Dept Description	Job Code	Job Title	Supervisor
<input type="checkbox"/>			005/16/2019	GRD	170388	Mathematics - Grads & Temps	A138	Graduate Teaching Asst	Pierre Gremaud
<input type="checkbox"/>			102/25/2019	STW	170388	Mathematics - Grads & Temps	TSW910	Student Worker, Enrolled@NCSU	Pierre Gremaud
<input type="checkbox"/>			209/03/2020	UNF	170301	Mathematics	N972	No pay Financial access	Seth Sullivant

Below is a student who had a pending action. The pending action would have to be approved or canceled in order to for your action to be initiated.

**Current Terminated Jobs and Pending Actions**

Job Code	Job Title	Supervisor	Hours/Week	Hire Date	Job Status	Expected End Dt
A148	Graduate Research Asst	Pierre Gremaud		28.00/08/16/2017	Terminated	
TSW930	Summer Student Worker (NCSU)	Leslie Kurtz		20.00/05/23/2018	Terminated	
ZB100	No-Pay Grad Fellowship	Pierre Gremaud		0.01/05/16/2019	Terminated	
N972	No pay Financial access	Pierre Gremaud		0.01/09/03/2019	Terminated	
A148	Graduate Research Asst	Pierre Gremaud		9.60/10/01/2021	Pending	05/15/2022

New transactions cannot be added for this person until Pending transactions are Approved or Cancelled.

Rehire Graduate

Here is an example of a student with multiple jobs, and the department is trying to rehire this student.

### Rehire a Graduate Assistant

Search Results							
	Student/Emp ID	Name	Unity ID	Academic Program	Academic Standing	Gender	Photo
<input checked="" type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Female	<a href="#">Photo</a>
<input type="checkbox"/>				Operations Research	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Biomathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Mathematics	GOOD	Female	<a href="#">Photo</a>
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Applied Mathematics	GOOD	Male	<a href="#">Photo</a>
<input type="checkbox"/>				Biomathematics	GOOD	Male	<a href="#">Photo</a>

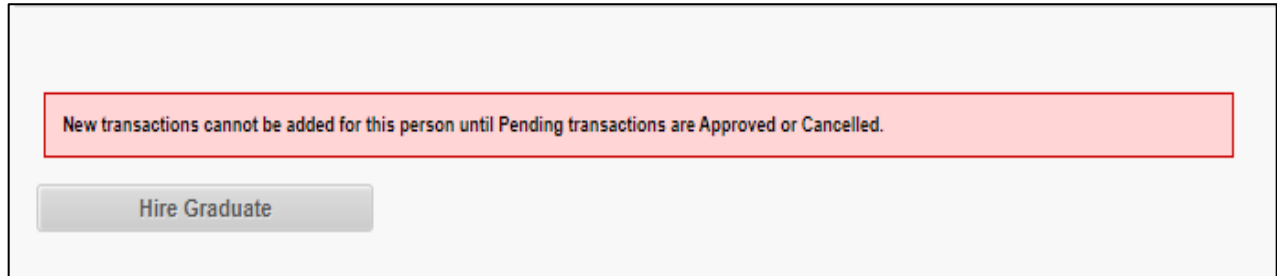
### Current Terminated Jobs and Pending Actions

Job Code	Job Title	Supervisor	Hours/Week	Hire Date	Job Status	Expected End Dt
W910	Student Worker, Enrolled@NCSU	Barbara Windom	6.00	05/16/2016	Terminated	
W910	Student Worker, Enrolled@NCSU	Jo Ellen Westmoreland	12.00	05/15/2017	Terminated	
100	No-Pay Grad Fellowship	Pierre Gremaud	0.01	05/16/2019	Terminated	
48	Graduate Research Asst	Mohammad Farazmand	20.00	08/16/2019	Terminated	

## 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.



### Teaching Assistant (TA) Date Warning

Teaching Assistants can be hired in fall and spring semesters as well as during the summer months within programmed date restrictions. If a New Hire action is routed using alternate 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.*)



### 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.



### **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 can also occur during a rehire to increase the student's FTE bringing them above .725 FTE. This is only a warning and selecting OK will allow the action to move forward.

Message

Please talk to your HR Rep for more information. (20011,3)

Due to the new total FTE for this person, Benefit expenses may be charged. Please talk to your HR Rep for more information. If submitted, this transaction will be sent to the Dean of the college for approval

OK

### **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.

**Error:** Hourly Rate is less than the minimum specified in the Salary Grade Table.

Hourly Rate is less than the minimum specified in the Salary Grade Table.

#### *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.

**Error:** Hourly Rate 45.454808 is greater than the maximum specified in the Salary Grade Table. [34] FOR SALPLAN / GRADEGRD/10

Hourly Rate 45.454808 is greater than the maximum specified in the Salary Grade Table. [34] FOR SALPLAN / GRADEGRD/10

**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.

 **Error:** FTE cannot exceed 1.0

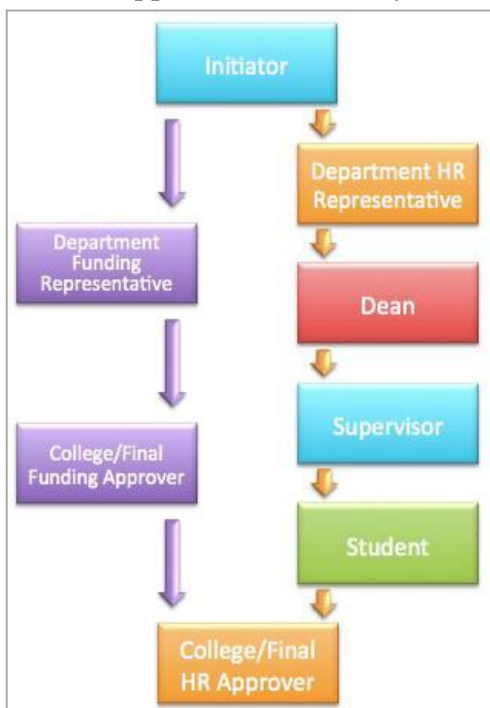


## Emails Generated by NextGen

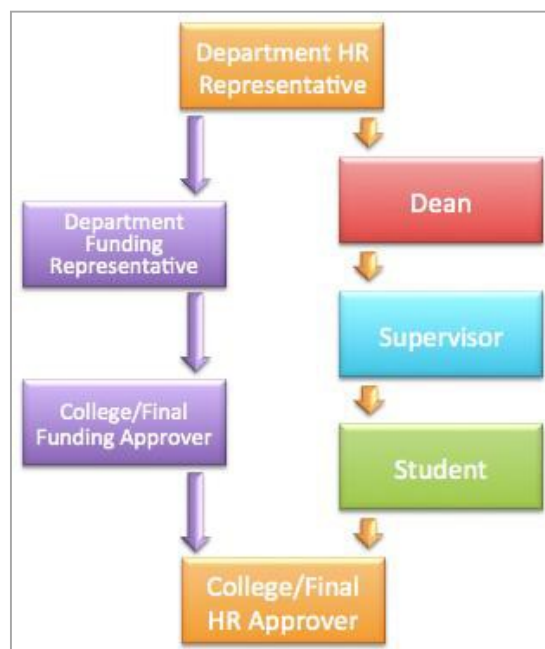
This system will generate several emails; therefore, we encourage persons with multiple roles to refer to the [Email Sorting](#) section for tips and tricks on how to manage emails generated by the NextGen Graduate Appointments System.

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



### Rehire Graduate



### 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:** AG#####

**Date of Submission:** 06-10-2020

**Effective Date:** 06-12-2020

**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. 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: [go.ncsu.edu/nextgen](http://go.ncsu.edu/nextgen)

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: Department HR Approval Needed for Graduate Assistant Transaction

The following graduate assistantship transaction has been submitted for processing and requires your review and/or approval.

**Transaction ID:** AG#####  
**Date of Submission:** 03-07-2022  
  
**Effective Date:** 03-14-2022  
**Action Description:** Hire Graduate Assistant  
  
**Student/Employee ID:** #####  
**Student Name:** First Name Last Name  
  
**Department:** 131101-TELS  
  
**Comments:** N/A

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: [go.ncsu.edu/nextgen](http://go.ncsu.edu/nextgen)

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. Please make sure you are logged into MyPack Portal before selecting the link.**

**URL HERE**

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

**Subject:** ACTION REQUIRED: Department HR Approval Needed for Graduate Assistant Transaction

The following graduate assistantship transaction has been submitted for processing and requires your review and/or approval.

**Transaction ID:** AG#####  
**Date of Submission:** 02-18-2022  
  
**Effective Date:** 01-01-2022  
**Action Description:** Grad Salary Adjustment  
  
**Student/Employee ID:** #####  
**Student Name:** First Name Last Name  
  
**Department:** 111401-Agricultural & Human Sciences  
  
**Comments:** N/A

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: [go.ncsu.edu/nextgen](http://go.ncsu.edu/nextgen)

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. Please make sure you are logged into MyPack Portal before selecting the link.**

**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:** AG#####

**Date of Submission:** 03-11-2022

**Effective Date:** 05-16-2022

**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

**Comments:** N/A

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 any time to access the transaction. For explicit instructions, please refer to the NextGen Graduate Appointment - Training Materials website: [go.ncsu.edu/nextgen](http://go.ncsu.edu/nextgen)

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**

## 5. 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:** AG#####

**Date of Submission:** 05-04-2020

**Effective date:** 05-16-2020

**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**

## **6. Email Sent When Action Approved and Loaded into Payroll**

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

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

<b>Transaction ID:</b>	<b>AG#####</b>
<b>Date of Submission:</b>	<b>03-17-2021</b>
<b>Effective date:</b>	<b>04-13-2021</b>
<b>Action Description:</b>	<b>End Appt. Temp/Grad Assignment</b>
<b>Student/Employee ID:</b>	<b>#####</b>
<b>Student Name:</b>	<b>First Name Last Name</b>
<b>Department:</b>	<b>110901-Crop &amp; Soil Sciences</b>
<b>Job Title:</b>	<b>Job code Not Found</b>
<b>Biweekly Salary:</b>	<b>884.62</b>
<b>Hours/Week:</b>	<b>20.00</b>
<b>Comments:</b>	<b>N/A</b>

**Click the link below to be directed to the approved transaction. Please make sure you are logged into MyPack Portal before selecting the link.**

**URL HERE**

## 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 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>

## 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 pop-ups 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](https://support.mozilla.org/en-US/kb/view-pdf-files-firefox-without-downloading-them)