Guide to
Finance, Human Resource, and Payroll Forms

This document assembled from two documents:
Office of Business and Financial Services Guide to Banner Finance Forms, V 2.0,(3-07), and
Guide to Banner & Other Human Resources & Payroll Forms, OBFS Training & HR Staff Development, V 3.0 (1-05).

NOTE: This document is a ongoing document, contains only BANNER forms key for them mentioned tasks. All BANNER forms and your accessibility to any form or process will be controlled by your security, controlled through your Unit Security Contact..

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What Form Do I Use To…	Form Title	Form Name
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What Form Do I Use To…	Form Title	Form Name
See if a vendor currently exists in the ***Banner*** database?	Entity Name/ID Search Form	FZIIDEN
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Review all transaction details for a specific ***Banner*** Invoice document number?	Invoice/Credit Memo Query Form	FAIINVE
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Validate a check number and its corresponding bank code?	Check Number Validation Form	FTICHKS
Verify Receipt Status of an Invoice, Purchase Order, or Requisition?	Receipt Required Indicator Query Form	FPARRIM
Review the accounting distribution of an invoice document?	Commodities and Accounting Review Query Form	FOICACT
Review the transaction postings for an invoice or check document?	Document Retrieval Inquiry Form	FGIDOCR
Search for a one-time vendor payment?	Document Retrieval Inquiry Form	FGIDOCR
Find out the Originator and all Approvers of an invoice document transaction?	Document Approval History Form	FOIAPPH
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Review encumbrance details and track invoice transactions posted against general encumbrance and purchase order encumbrance balances?	Encumbrance List Form and Detail Encumbrance Activity Form	FGIENCB FGIENCD

General Ledger Queries

What Form Do I Use To…	Form Title	Form Name
View a unit's budget activity and trans-action details for a FOAPAL by Account (for transactions that posted to the FOAPAL and transactions that roll up to that FOAPAL)?	Executive Summary Form **and**	FGIBDSR
	Detail Transaction Activity Form	FGITRND
View a unit's budget activity and transaction details for a FOAPAL by Account (for transactions that posted to that FOAPAL only)?	Organization Budget Status Form **and**	FGIBDST
	Detail Transaction Activity Form	FGITRND
Compute and view my Fund Balance?	General Ledger Trial Balance Form	FGITBAL
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View my already computed Fund Balance?	Trial Balance Summary Form	FGITBSR
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Journal Voucher Processing

Form Name	Form Title	What Can I Do With This Form?
FGAJVCD	Journal Voucher Entry Form	• Prepare a journal voucher for an encumbrance-related transaction or for a fixed asset transfer. • Access an in-process (incomplete) journal voucher to complete it. • Increase or decrease each sequence of a general encumbrance. • Partially or totally liquidate each sequence of a general encumbrance.
FGAJVCM	Journal Voucher Mass Entry Form	• Access an in-process (incomplete) journal voucher to complete it. • Simplify the process of creating journal vouchers with one debit and multiple credits, or multiple debits and one credit. • Display each accounting distribution for a journal voucher in a spreadsheet format.
FGAJVCQ	Journal Voucher Quick Form	• Access an in-process (incomplete) journal voucher to complete it. • Prepare a journal voucher with a form that shows descriptions of the FOAPAL segment codes.
FGIDOCR	Document Retrieval Inquiry Form	• Review the details of a posted journal voucher including its document text. • Verify that a journal voucher has been posted.
FGIJSUM	Journal Voucher Summary Form	• Review the details of an unposted journal voucher to determine if it is postable or suspended.
FGIJVCD	List of Suspended Journal Vouchers Form	• See only the statuses for journal vouchers that are unposted.
FOADOCU	Document By User Form	• See the statuses of all journal vouchers I created. See the statuses of all journal vouchers that another Banner user created (must enter user's enterprise ID). • View a list of all encumbrances that I created • View a list of all encumbrances that another Banner user created (must enter the user's enterprise ID).
FOATEXT	General Text Entry Form	• Update the document text of a journal voucher. • View the reason that a transaction was made. • Find out the name, unit and phone number of the person who made the transaction.
FOIAPPH	Document Approval History Form	• Find out the Originator and all Approvers of a journal voucher. • View a journal voucher's approval history.

General Encumbrances

Form Name	Form Title	What Can I Do With This Form?
FGAENCB	Encumbrance / Reservations Maintenance Form	• Create a general encumbrance.
FGAJVCD	Journal Voucher Entry Form	• Prepare a journal voucher to increase or decrease each sequence of a general encumbrance. • Prepare a journal voucher to partially or totally liquidate each sequence of a general encumbrance. • Access an in-process (incomplete) journal voucher to complete it.
FGIENCB	Encumbrance List Form	• View a summary list of all general encumbrances in the Banner system. • Find out if an encumbrance is open or closed. • Look up encumbrances, balances of a purchase order, and change order increases.
FGIENCD	Detail Encumbrance Activity Form	• Review detailed transaction activities against an encumbrance. • Find out if an encumbrance is open or closed. • Track grant activities as they are posted against an encumbrance. • Look up encumbrances, balances of a purchase order, and change order increases.
FGIOENC	Organizational Encumbrance List Form	• Display all open encumbrances by Organization and/or Fund.
FOADOCU	Document By User Form	• View a list of all encumbrances that I created. • View a list of all encumbrances that another Banner user created (must enter the user's enterprise ID). • See statuses of all journal vouchers that I created. • See statuses of all journal vouchers that another Banner user created (must enter the user's enterprise ID).

Accounts Receivable

Form Name	Form Title	What Can I Do With This Form?
FOAIDEN	Person Identification – Finance Form	• Search a General Accounts Receivable (GAR) customer or non-student by name. • Look up GAR address information.
SOAIDEN	Person Search Form	• Search for a student by name.
TFAACCT	Account Review Form –Finance	• View GAR aging information and set billing and delinquency codes.
TFADETL	Account Detail Form	• Data entry form for general account charges.
TFAMASS	Billing Mass Data Entry Form	• Mass bill charges that are not term specific.
TFIAREV	Account Detail Review Form	• Look up GAR information.
TGACOMC	Comment Central Form	• View account comments.
TGACREV	Cashier Session Review Form	• Close a cashier session. • Review data entry transactions entered in *Banner*.
TSAACCT	Account Review Form –Student	• View student account aging information and set billing and delinquency codes.
TSAAREV	Account Detail Review – Student Form	• View a student account in detail.
TSADETL	Student Account Detail Form	• Data entry for student account and/or term related charges.
TSAMASS	Billing Mass Data Entry – Student Form	• Mass bill term specific charges for students.
TSICSRV	Customer Service Inquiry Form	• View a student account.

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Form Name	Form Title	What Can I Do With This Form?
FGIENCD	Detail Encumbrance Activity Form	• Track grant activities as they are posted against an encumbrance. • Find out if an encumbrance is open or closed.
FOATEXT	General Text Entry Form	• Enter and update the required document text for a transaction. • View the reason a transaction was disapproved.. • Find out the name, unit and phone number of the person who made the transaction.
FOAUAPP	User Approval Form	• Display all items in an approval queue. • Approve or disapprove a document.
FOIAPHT	Approval History Form	• View a document's approval history. • Show all the documents a user has approved. • View an online display of documents sorted by document code.
FOIAPPH	Document Approval History Form	• View a document's approval history. • Find out the Originator and all Approvers of a document.
FRIASTG	Grant Agency Inquiry Form	• View all grants associated with an agency.
FRIBUDG	Grant Budget Codes Inquiry Form	• View budget codes associated with a grant code.
FRIKGNT	Grant Title Search Form	• Search for a grant code using any part of the grant's long title.
FRIORGH	Grant Organization Inquiry Form	• View grants associated with a specific unit.
FRIPSTG	Grant Personnel Inquiry Form	• Find out all the grants that a Principal Investigator has.
FTIAGYH	Agency Hierarchy Query Form	• Find an agency's place in its hierarchy. • Locate an agency's predecessor to find out if a grant is a Federal grant or a State of Illinois grant.
FTVACCI	Account Index Code Validation Form	• Query index codes.

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Form Name	Form Title	What Can I Do With This Form?
FTMINDA	Indirect Cost Charge Code Maintenance Form	• Query indirect cost charge codes.
FTMINDD	Indirect Cost Distribution Maintenance Form	• Query indirect cost distribution codes.
FZAAREV	Grant Payments Entry Form	• Look up payments for a grant.
FZAGRNT	Grant Maintenance Form	• Look up grant attributes. • Find out information about a grant including the description and award amount.
FZIBDET	Research Accounting Billing Detail Inquiry Form	• View the total amount billed for a grant, total amount paid and total refunds.
FZIBDSG	Grant Budget Distribution Inquiry Form	• Review the information regarding each budget. • Find out how a budget was put in by OBFS Grants and Contracts.
FZIBILL	Grant Billing Query Form	• View billing activity and corresponding payment history associated with a grant.
FZIGITD	Grant Inception To Date Form	• View a unit's budget activity and transaction details by Account code. • Find out the overdraft status of a grant project. • See all Fund codes associated with a grant. (Check "Fund Summary" box.)
FZIGTRD	Grant Transaction Detail Form	• View a unit's budget activity and transaction details by Account code.
FZMRFND	Research Accounting Fund Maintenance Form	• Query a grant's indirect cost codes.
FZMBASI	Basis Definition Code Maintenance Form	• Query indirect cost basis codes.
FZMINDR	Indirect Cost Rate Code Maintenance Form	• Query indirect cost rate codes.
FZMFUND	Fund Code Maintenance Form	• Search for existing Fund codes. • Find Fund personnel associated with a Fund code

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Form Name	Form Title	What Can I Do With This Form?
FZAREQN	Requisition Form	• Prepare a purchase requisition resulting in a PO. • Delete an in-process (incomplete) requisition. • Copy a requisition or PO into a new requisition.
FTVCOMM	Commodity Validation Form	• Display commodity codes and associated descriptions defined to the system. • Verify or select a commodity code to process.
FTVSHIP	Ship to Validation Form	• Display ship to codes defined in Banner. • Verify shipping locations for purchasing commodity deliveries.
FZIIDEN	Entity Name / ID Search Form	• See if a vendor exists in the Banner database.
FTMVEND FOAIDEN	Vendor Maintenance Form **and** Person Identification Form	• Find the address of a vendor.
FOAAINP	Document Approval Form	• Determine which individuals in my department are authorized to approve a requisition. • Approve or disapprove an invoice or other document. • Display remaining invoices in the approval queues.
FOAPOXT	Procurement Text Entry Form	• Update the document text for an in-process (incomplete) requisition (Access via FZAREQN / Options, Doc Text).
FOAUAPP	User Approval Form	• Approve or disapprove a requisition or other document. • Display all items in an approval queue.
FOIAINP	Approvals Notification Form	• Display all completed requisitions or other documents awaiting approval.
FOIAPHT	Approval History Form	• View a document's approval history. • Show all the documents a user has approved. • View a display of documents sorted by document code.
FOIAPPH	Document Approval History Form	• View a document's approval history. • Find the Originator and Approvers of a document.
FPROPNR	Open Request Report	• Display the status of requests for goods and services that have not been fully satisfied (open).

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Form Name	Form Title	What Can I Do With This Form?
FOIDOCH	Document History Form	• See the status of all requisitions and PO's I created, e.g., if paid, if items were returned. • Look up a requisition to see if it has been approved and/or if a buyer has assigned a PO number to it. • Access and view processing and payment records associated with a PO, invoice or check. • Query for a return. • Determine check number on which an invoice was paid.
FGIENCB	Encumbrance List Form	• Look up encumbrances, PO balances, and change order increases. • View a summary list of encumbrances in Banner. • Find out if an encumbrance is open or closed.
FGIENCD	Detail Encumbrance Activity Form	• Look up encumbrances, balances of a PO, and change order increases. • Find out if an encumbrance is open or closed. • Review detailed transaction activities against an encumbrance.
FPIPURR	Purchase/Blanket/ Change Order Query Form	• Look up a requisition to see if it has been approved and/or if a buyer has assigned a number to it. • Display purchase orders that are completed, approved, closed, cancelled or in progress.
FPIREQN	Requisition Query Form	• Print requisitions. (Use File, Print.) • Query requisitions. • Locate all requisitions from a specific requestor. • View completed, approved, closed, canceled, or in-process requisitions. • View document information (including cancel date and reason, close date). • View requestor and ship to information. • View vendor information. • View commodity and FOAPAL information. • View text associated with the requisition.
FPIRQST	Requisition Validation Form	• Query requisitions. • Locate all requisitions from a specific requestor.

Receiving

Form Name	Form Title	What Can I Do With This Form?
FOIDOCH	Document History Form	• Access and view receiving documents related to purchase order documents. • Query for a return. • See the status of all requisitions and purchase orders that I created, e.g., have they been paid, were the items returned. • Look up a requisition to see if it has been approved and/or if a buyer has assigned a purchase order number to it. • Identify and find the status of all documents in the processing path for a selected document and find the processing history of purchasing and payment documents. • Determine the check number on which an invoice was paid.
FPARCVD	Receiving Goods Form	• Prepare a receiving order to receive a partial or full order. • Delete an in-process receiving document. • Create an adjustment to a previously received purchase line item.
FPARTRN	Returned Goods Form	• Record return shipment information for specific commodity line items on a purchase order.
FPIIREC	Receiving/Matching Detail Query	• Search for invoice and receiving data for a specific invoice or purchase order document number.
FPIRTRN	Return Goods Validation List Form	• Query for a return.

Accounts Payable Queries (1 of 2)

Form Name	Form Title	What Can I Do With This Form?
FZIIDEN	Entity Name / ID Search Form	• See if a vendor currently exists in the Banner database. • Review status of existing vendor ID or UIN in the Banner database for Entity indicator column (P/C) and the "V" (Vendor indicator column: Y (Yes), N (No), T (Terminated).
FTMVEND FOAIDEN	Vendor Maintenance Form **and** Person Identification Form	• Find the address of a vendor.
FAARUIV	Recurring Payables Form	• Display the payment schedule for a recurring invoice document. • Find out how many payments are remaining on an invoice.
FAICHKH	Check Payment History Form	• Search payment details by check number. • Identify and review all transactions paid on a check, the vendor name, the date of the check, and the amount of the check. Review available invoice images for listed transactions.
FAIINVE	Invoice/Credit Memo Query Form	• Review all transaction details for a specific Banner invoice document number.
FAIINVL	Invoice/Credit Memo List Form	• Query a list of invoices by document status category (Open, Paid, Suspense, Hold).
FAIIREC	Receiving/Matching Status Query Form	• Search for invoice and receiving data specific to a single vendor ID number or name.
FAIOINF	Open Invoices by FOAPAL Form	• Display open invoices by chart of accounts or FOAPAL elements.
FAIVHIS	Vendor History Query Form	• Review year-to-date total dollars paid to a single vendor ID number by Fiscal Year.
FAIVINV	Vendor Invoice Query Form	• Query a summary of transaction and commodity details by a specific vendor ID and invoice number. • Search for a PO number and payment status by the vendor's invoice number.

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Form Name	Form Title	What Can I Do With This Form?
FAIVNDH	Vendor Detail History Query Form	• Find all payments to a single UIN or vendor ID by FY. • Identify categories of invoices in the system for a single vendor ID or UIN: All, Open, Paid.
FGIDOCR	Document Retrieval Inquiry Form	• Review the transaction postings for an invoice or check document (as well as for requisitions, purchase orders and journal vouchers). • Search for a one-time vendor payment using the Document field search option.
FOATEXT	General Text Entry Form	• Update the document text of a transaction • Find and review text notes recorded for a specific invoice, vendor or check transaction.
FOIAPHT	Approval History Form	• View display of documents sorted by document code. • View a document's approval history. • Show all the documents a user has approved.
FOIAPPH	Document Approval History Form	• Find out the Originator and Approvers of a document. • View a document's approval history.
FOICACT	Commodities + Accounting Review Query Form	• Review the accounting distribution of an invoice document.
FOICOMM	Commodities for Review Query Form	• Display detailed information about an invoice commodity.
FOIDOCH	Document History Form	• See status of all related transactions for a single document number (requisitions,POs,invoices, returns, receiving, etc.) • Access and view processing and payment records associated with a PO, invoice or check. • Find the check number on which an invoice was paid. • Research a check's history. • Query for a return.
FPARRIM	Receipt Required Indicator Query Form	• Verify receipt status of an invoice, PO, requisition.
FPIIREC	Receiving/Matching Detail Query Form	• Search for invoice and receiving data for a specific invoice or purchase order document number. • Identify invoice transactions awaiting receiving documents.
FTICHKS	Check Number Validation Form	• Validate a check number and corresponding bank code. • Query for a list of payments for specific date or bank.
FGIENCB FGIENCD	Encumbrance List Form Detail Encumbrance Activity Form	• Review encumbrance details and track invoice transactions posted against general encumbrance and purchase

General Ledger Queries

Form Name	Form Title	What Can I Do With This Form?
FGIBDSR	Executive Summary Form	• View a unit's budget activity and transaction details for a FOAPAL by Account (for transactions that posted to the FOAPAL and transactions that roll up to that FOAPAL).
FGIBDST	Organization Budget Status Form	• View a unit's budget activity and transaction details for a FOAPAL by Account (for transactions that posted to that FOAPAL only). • Query outstanding encumbrances, using any data entry combination of Fund, Organization, Account, Account Type, Program, Activity, or Location.
FGIGLAC	General Ledger Activity Form	• Query and display transaction details for specific Funds and Accounts.
FGITBAL	General Ledger Trial Balance Form	• Compute and view my Fund balance. • View the Account balances for a Fund. • Query and display transaction details for specific Funds and Accounts.
FGITBSR	Trial Balance Summary Form	• View my already computed Fund balance. • Query and display transaction details for specific Funds and Accounts.
FGITRND	Detail Transaction Activity Form	• View a unit's budget activity and transaction details for a FOAPAL by Account (for transactions that posted to the FOAPAL and transactions that roll up to that FOAPAL). • View a unit's budget activity and transaction details for a FOAPAL by Account (for transactions that posted to that FOAPAL only).

HUMAN RESOURCES & PAYROLL FORMS
Adjustment Processing Forms

What form do I use to…	Form Title	Form Names Hint?
Confirm that an employee's job or record was created properly?	Banner Employee Summary View Form	NZIESUM
Review the payroll calculation schedule?	University Payroll Schedule	http://www.obfs/earnings/ 2005payrollschedule.xls
Submit a request to Payroll to correct time entry errors when a timesheet has been approved but before the final payroll calculation? Submit a request to Payroll to process an adjustment for an overpayment and/or to send an overpayment letter? Review an adjustment notification and approve it, reject it, or return it for correction? How do we differentiate an adjustment in Banner then in ANA with this question? Is it the term "notification"? Edit or delete a returned adjustment notification?	Adjustment Notification Application (ANA) https://apps.obfs.uillinois.e du/ANA/index.cfm	Refer to the ANA Training Guide http://www.obfs.uillinois.e du/earnings/ANA_Trainin g.pdf
Determine the disposition of a timesheet?	Banner Pay Event List Form PZILIST	http://www.obfs.uillinois.e du/jobaids/PG_PE_Adjus tmentProcessingfor%20 Units_B7.3.pdf
Make a positive post-payroll adjustment when an employee was underpaid during a previous pay period? Submit an adjustment to the Department Approver's Worklist? Review adjustments in my Department Approver Worklist and assign and route them to Payroll? Erase a rejected adjustment? Correct an adjustment returned for correction?	Workflow and the Banner Adjustment Processing Form PZAADJT	http://www.obfs.uillinois.e du/jobaids/PG_PE_Adjus tmentProcessingfor%20 Units_B7.3.pdf
Check an adjustment's status in Workflow?	http://www.obfs.uillinois.edu/jobaids/JA_PE_Reviewing StatusAdj_PZAADJT_B7.3.pdf	
Check an adjustment's status in Banner?	http://www.obfs.uillinois.edu/jobaids/JA_PE_Workflow AdjStatusSearch_B7.3.pdf	

Banner Labor Redistribution Forms

What form do I use to…	Form Title	Form Name, Job Aid
Perform a redistribution of earnings for a single pay event or for multiple pay events?? Perform a labor distribution or redistribution? for a single employee for multiple FOAPALS	Labor Redistribution Form	PZAREDS http://www.obfs.uillinois.edu/jobaids/PG_P E_LaborRedist_B7.3.pdf
Perform a labor redistribution for an employee not in my organization?	Not possible, You need to own the job.	

Banner One-Time Pay Forms

What form do I use to…	Form Title	Form Name
Enter the hiring information for a person who I will pay only one time? Enter the necessary data to pay a person one time only (outside the normal payroll process)?	One-Time Payment Form	PEA1PAY

Banner Person Information Forms

What form do I use to…	Form Title	Form Name
View a UIN / SSN? View an address? (Campus, permanent, etc.) View Emergency Contact information?	Identification	PPAIDEN
View email address?	Identification, or Email Address	PPAIDEN GOAEMAL -
View Visa Information?	International Information	GOAINTL
View Work Experience?	Person Experience	PPAEXPR
View Certification / License / Endorsement information?	Certification Information	PPACERT
View Publications? View Driver's License? View Honors and Awards?	General Information	PPAGENL

Banner Employee Information Forms

What form do I use to…	Form Title	Form Name
Search for an employee when you don't know the UIN or SSN?	Employee Search	POIIDEN
Search for a person's UIN using the SSN?	SSN / SIN Alternate ID Search	GUIALTI
Find general employee information using their UIN?	Employee Information Form	PEAEMPL
View a summary of employee information for all jobs, such as FTE, Titles, Rates, Labor Distributions, etc.?	Employee Summary View Form	NZIESUM
Submit an employee name change to Central HR?	Personnel Information Transmittal Report	PITR
Submit an employee FTE change?	Personnel Information Transmittal Report	PITR
Change an employee's job title?	Position Definition Form *and* Personnel Information Transmittal Report	NBAPOSN PITR
View FTE changes?	Employee Summary View Form	NZIESUM
Update an employee work schedule?	Employee Jobs Form	NZAJOBS
View last workday (Terminated employees only)?	Employee Information Form	PEAEMPL
View Job Information, Personnel Change Date?	Employee Job Form	NBAJOBS
View Position budget, salary budget and position labor distributions?	Position Budget Form	NBAPBUD
Enter salary changes?	Position Budget Form	NBAPBUD
View position descriptors?	Position Description	PAAPDES
View codes for position duties?	Position Classification Descriptors	PAACDES
View Pape Numbers?	Regulatory Information (Natl Occupation Code Field) in	NBAPSON
View Faculty Discipline areas?	Regulatory Information option	NBAPOSN
View incumbent information for a position?	Position incumbent list	NBIPINC

Banner Leave Information Forms

What form do I use to…	Form Title	Form Name
Enter non-FMLA or non-Sabbatical leave dates?	Employee Leave of Absence Form	PZAELOA
Submit leave request and approvals to Central HR? Submit sabbatical leave information to Central HR?	Personnel Information Transmittal Report	PITR
Update AP leave balances if transferring positions? Update Academic shared benefits balances?	Employee Leave Balances Form	PEALEAV
Report Civil Service vacation or sick leave time?	Electronic Approvals of Time Entry Form	PHATIME
Enter or view non-FMLA or non-Sabbatical leave dates?	Employee Leave Balances Form *or* Employee Leave History Form	PEALEAV PEILHIS

Banner Family Medical Leave (FMLA) Information Forms

What form do I use to…	Form Title	Form Name
View FMLA Status? Enter or view FMLA eligibility dates (Year Begin and End Dates)? Enter FMLA leave request dates? Enter or view the status of a FMLA leave request?	Employee FMLA Information Form	PEIFMLA
Enter or view partial paid or unpaid FMLA leave of absence dates?	Employee Leave of Absence Form	PZAELOA
Submit leave request or approvals to Central HR?	Personnel Information Transmittal Report	PITR

New Hire - Civil Service Employees Forms

What form do I use to…	Form Title \ Name and :Links
Request a civil service employee position?	Employee Requisition form https://hrnet.uihr.uillinois.edu/dart-cf/admin/index.cfm
Search for an existing UIN for the new hire employee?	DART New Hire process or i-card System https://hrnet.uihr.uillinois.edu/dart-cf/admin/index.cfm
Create a new hire logon?	DART New Hire process https://hrnet.uihr.uillinois.edu/dart-cf/admin/index.cfm
Submit new hire job information to Central HR?	Personnel Information Transmittal Report (PITR)
View employee information?	Employee Summary View Form (NZIESUM)

New Hire - Academic/Faculty Employees Forms

This category includes Academic Professionals (AP), Faculty, Clinical and Research Faculty, Visiting Faculty, Lecturers, and Post-doctoral Research Associates.

What form do I use to…	Form Title	Form Name
Request a new AP position?	Principal Administrative Position Exemption Form	PAPE
Create a new position (AP, Faculty, Other Academic)? Enter a job title?	Position Definition Form	NBAPOSN
Attach position description attributes (e.g., position is security sensitive)?	Position Description Form	PAAPDES
Create a budget for a position? Create a salary budget for a position?	Position Budget Form	NBAPBUD
Search for an existing UIN for the new hire employee?	DART New Hire process or i-card System	
Create a new hire logon?	DART New Hire process	
Submit new hire job information to Central HR? Submit employee reappointment information to Central HR? Submit faculty promotion information to Central HR?	Personnel Information Transmittal Report	PITR
View employee information?	Employee Summary View Form	NZIESUM

New Hire - Other Employees Forms

This category includes Academic Hourly, Graduate Hourly, Graduate Assistants, Academic Unpaid, and Extra Help Non-Clerical employees.

What form do I use to…	Form Title/Name	Form Name
Create a new position?	Position Definition Form	NBAPOSN
Attach position description attributes (e.g., position is security sensitive)?	Position Description Form	PAAPDES
Create a budget for a position? Create a salary budget for a position? Enter salary changes?	Position Budget Form	NBAPBUD
Search for an existing UIN for the new hire employee?	DART New Hire process or i-card System	
Create a new hire logon?	DART New Hire process	
Enter new hire job information?	Employee Jobs Form	NBAJOBS)
View employee information?	Employee Summary View Form	NZIESUM

New Hire - Student Employees Forms

What form do I use to…	Form Title	Form Name
View my unit's current student positions?	Position Definition Form	NBAPOSN
View my unit's current position budget?	Position Budget Form	NBAPBUD
Submit a request for a new student employee?	Student Employee Requisition form http://www.vcsa.uic.edu/MainSite/departments/career_services/sub_student_employment/Departments/Dept+Forms.htm	
Create a new hire logon?	DART New Hire Logon	
Submit new hire job information to Student Employment Office?	Personnel Information Transmittal Report	PITR
Determine student Federal Work Study (FWS) eligibility?	Student Employment Authorization Form	RJASEAR

Separation - Civil Service Employees Forms

What form do I use to…	Form Title/Name	Form Name
Submit separation information to Central HR?	Personnel Information Transmittal Report	(PITR)
Log the amount of leave used since the last reporting period?	Employee Leave Balance Form	PEALEAV
Begin the separation process?	DART Separation Form	
Process vacation and sick leave payout for the Payroll Office?	Adjustment Processing Form	PZAADJT
Remove a terminated employee as an approver in a time\attendance routing queue?	Contact AITS Security	
View employee information?	Employee Summary View Form	NZIESUM

Separation - Academic/Faculty Employees Forms

This category includes Academic Professionals (AP), Faculty, Clinical and Research Faculty, Visiting Faculty, Lecturers, and Post-doctoral Research Associates.

What form do I use to…	Form Title	Form Name
Submit separation information to Central HR?	Personnel Information Transmittal Report	PITR
Log amount of leave used since the last reporting period?	Employee Leave Balance Form	PEALEAV
Begin the separation process?	DART Separation Form	
Process vacation or sick leave payout for the Payroll Office?	Adjustment Processing Form	PZAADJT
Remove a terminated employee as an approver in a time\attendance routing queue?	Contact AITS Security	
View employee information?	Employee Summary View Form	NZIESUM

Separation - Other Employees Forms

This category includes Academic Hourly, Graduate Hourly, Graduate Assistants, Academic Unpaid, and Extra Help Non-Clerical employees.

What form do I use to…	Form Title/Name	Form Name
Begin the separation process?	DART Separation Form	
End jobs?	Employee Jobs Form	NBAJOBS
Terminate an employee?	Employee Form	PEAEMPL

Separation – Student Employees Forms

What form do I use to…	Form Title/Name	Form Nam
Submit separation information to Student Employment Office?	Personnel Information Transmittal Report	PITR

Departmental Time Entry for Bi-Weekly Employees

What form do I use to…	Form Title	Form Name
Extract timesheets?	Electronic Approvals of Time Entry	PHATIME
Enter and submit time for non-exempt, exempt and positive time employees?	Electronic Approvals of Time Entry	PHATIME
Explain to Payroll when there is no earnings code available to apply time against?	Electronic Approvals of Time Entry	PHATIME (Comments block)
Restart an employee's timesheet?	Electronic Approvals of Time Entry	PHATIME
Review leave balances?	Employee Leave Balance Form	PEALEAV
Correct and re-submit returned timesheets?	Electronic Approvals of Time Entry	PHATIME
Create a proxy for a Department Originator?	Electronic Approval Proxy Rules	NTRPROX