

HOW TO CREATE OR MAINTAIN AN EMPLOYEE IN BANNER HRIS Employee Form (PEAEMPL)

General

The *Employee Form* (PEAEMPL) establishes information about an employee's term of employment. (It does not include mandatory biographic/demographic data which must be completed on PPAIDEN before entering PEAEMPL). You must complete this form before assigning a position to the employee on NBAJOBS.

Check List

Before you proceed, you must have the following information:

- Information about all the employee's positions at the university.

Remember: The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as warnings and errors that do not necessarily block your progress.

Accessing the "Employee Form" (PEAEMPL)

Type the name of the form **PEAEMPL** in the Direct Access field.

The adjacent screen will appear:

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

The screenshot shows the 'Employee Form PEAEMPL 5.3.3 (BANUP2)' window. The left sidebar contains a navigation menu with categories like 'Employee Information', 'Regulatory Information', 'Other Information', 'Termination Information', 'Leave/Absence Information', 'Hiring Location Information', 'Job/Assignment Detail', 'Employee History', and 'Faculty Information'. The main area is divided into 'General Employee Information' and 'Service Dates'. Fields are numbered as follows: 1. ID; 2. Employee Status; 3. Employee Class; 4. Employee Group; 5. Leave Category; 6. Benefit Category; 7. FT/PT Status; 8. COA; 9. Organization; 10. Home Department; 11. Check Distribution; 12. District/Division; 13. Current Hire; 14. Original Hire; 15. Adjusted Svc; 16. Seniority; 17. First Work Day; 18. Last Work Day.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✓	1.	ID	Enter or Search for an ID number.		Identification number of the employee.	List for Person (SOAIDEN) List for Employee (POIIDEN)
✓			Proceed to the Next Block by clicking the icon or by pressing Ctrl + Page Down on your			

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
			keyboard.			
General Employee Information						
✓	2.	Employee Status	Select employee status from list.		The status of the employee. Can range from <i>Active</i> to <i>Terminated</i> . Status can change. The status of the employee will determine the benefits and type of compensation he/she receives. For example if the status is being changed to <i>Terminated</i> , a reason must be recorded and the date when the change began must be entered.	
✓	3.	Employee Class	Enter or search for employee class code.		The employee class to which the employee belongs.	Employee Class Query Form (PTOECLS)
✓	4.	Employee Group			Codes default from the Employee Class Rule Form (PTRECLS) based on the entry in the Employee Class field. The Leave and Benefit Categories can be overridden if permitted by the e-class. The Employee Group and FT/PT Status can be overridden.	
✓	5.	Leave Category				
✓	6.	Benefit Category				
✓	7.	FT/PT Status				
✓	8.	COA - Home Department				Chart of Accounts code of the home organization for the employee.

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
✓	9.	Organization - Home Department			Administrative department of the home organization for the employee.	
✓	10.	COA - Check Distribution			Chart of Accounts code to which the employee's check is distributed. Defaults from the Home Department COA but can be overridden.	
✓	11.	Organization - Check Distribution			Administrative department to which the employee's check is distributed. Defaults from the Home Department Organization, but can be overridden.	
	12.	COA - District/Division			Not used for now.	
Service Dates						

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
✓	13.	Current Hire			<p>Required field. The date first appointed into a position where there is continuous service all within the same employer code.</p> <p>Note:</p> <p>1) When a person goes from a casual/academic student position into a regular/term position, the current hire date must be updated.</p> <p>2) When a person goes from a non-McGill entity (e.g. Aylmer & Sherbrooke) to a McGill position, the current hire date must be updated.</p> <p>3) When a person goes from term to regular the date remains the same.</p>	
✓	14.	Original Hire			<p>Required field. The start date of the original personnel record. This date will not change for breaks in service or when moving from a casual/academic student position to a term/regular position.</p>	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
✓	15.	Adjusted Svc			Required field. This date should be the same as the current hire date unless there is recognition for casual work. If recognition is given, this date should be updated to reflect the adjustment.	
✓	16.	Seniority			Required field. This date should be the same as the current hire date. Note: The bargaining unit seniority will be carried elsewhere.	
	17.	First Work Day			Optional field. Used by Payroll for ROE/EI processing.	
	18.	Last Work Day			Optional field. Used by Payroll for ROE/EI processing.	

Leave Balances Window:

The Leave Balances Window collects employee leave information.

Leave in Banner means vacation or incidental illness.

Note: All fields in this form are optional.

Note: No decision has been made yet on its use at McGill.

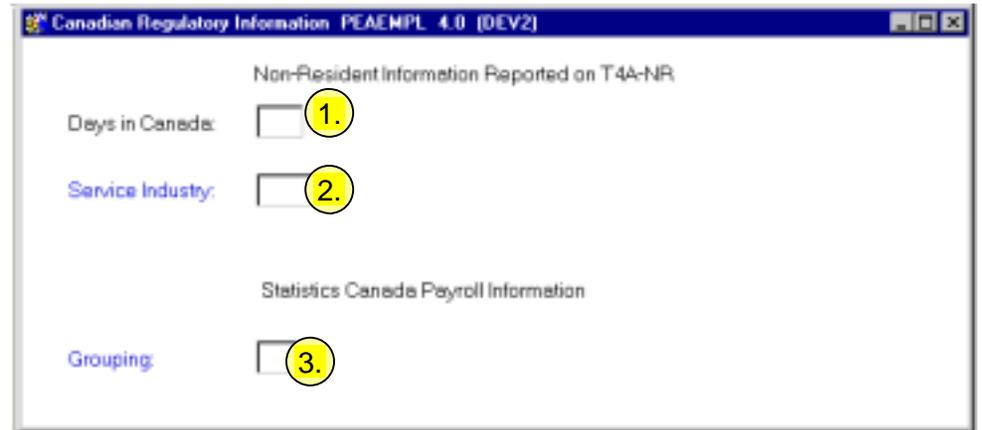
Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	Leave Code	Enter or search for leave code.		Optional field.	Leave Category Rule Form (PTRLCAT)
	2.	Date Available			Date when the leave time is available to the employee to use.	
	3.	Current Available			Calculated by Banner. Available leave hours.	
	4.	Hours Banked			Number of hours stored for the employee's leave.	
	5.	Hours Accrued			Year-to-date leave hours-accrued default.	
	6.	Hours Taken			Year-to-date leave hours taken default.	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
	7.	Begin Balance			Balance of leave hours at the beginning of the year default.	
	8.	Change reason			If you change the leave hours enter a reason in free-form text into this field.	

Canadian Regulatory Information:

The Canadian Regulatory Information Window collects data for use in Canadian T-4 and Statistical Canada reporting.

Note: No decision has been made yet on its use at McGill.



<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
Non-Resident Information Reported on T4A-NR						
	1.	Days in Canada				
	2.	Service Industry			The employee's service industry	

Statistics Canada Payroll Information:

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	3.	Grouping			Used by payroll for Stats Canada reporting.	

U.S. Regulatory Information:

Note: At present we do not expect to use *the U.S. Regulatory Information Window* as it is used to support U.S. information.

The screenshot shows a window titled "U.S. Regulatory Information: PEAEMPL 5.3.3 (BANTRAIN)". It contains several sections:

- FLSA Information:** FLSA Indicator: [None] (dropdown), Work Period: [] []
- I9 Information:** Form Ind: [Not Received] (dropdown), Date: [], Expire: []
- For IPEDS reporting, is this employee paid with 'Soft Money?'** IPEDS Soft Money:
- Social Security Name:** First: [], Middle: [], Last: [], Suffix: []
- California Pension Information:** Current Membership Status: [None] (dropdown)
- 1042S Information:** 1042S Recipient: [None] (dropdown)

Termination Information:

The *Termination Information Window* collects termination data.

The screenshot shows a window titled "Termination Information: PEAEMPL 4.0 (DEV2)". It has two main input fields:

- Reason:** [] with a callout '1.' pointing to the text input area.
- Termination Date:** [] with a callout '2.' pointing to the date input area.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✓	1.	Reason	Enter or search for		The reason the employee	⇒ Termination Reason

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
			the termination reason code that best defines the reason the employee is being terminated.		was terminated.	Rule Form (PTRTREA)
✓	2.	Termination Date	Enter the last day of employment.		The last day of employment.	
✓			Save the record.			

Leave of Absence Information:

Note: At present we do not expect to use the Leave of Absence Information Window.

