Student Employment Appointment Workflow Application User Guide

Overview

The Student Employment Appointment Workflow App facilitates the process for departments to submit Student Employment forms. Departments complete an online form, which is then routed for review and approval to the department's financial manager, the Office of Financial Aid & Student Employment, and Human Resources. Parties are notified via email as the form proceeds through the workflow.

- The Student Employment Appointment Workflow App is accessed via a web browser
- The App is available to all WCSU faculty and staff
- Users are prompted to sign in with their standard WCSU credentials
- Users are prompted to grant permission to allow the App to access their Outlook account (solely for the purpose of sending workflow notification emails).

The full URL of the Workflow App is:

https://apps.powerapps.com/play/e/default-e1622dbc-94ba-48ad-87bb-a7f28074ee3d/a/968cc8fd-8995-433f-a992-33d02c188aea?tenantId=e1622dbc-94ba-48ad-87bba7f28074ee3d&source=portal&screenColor=RGBA%280%2C176%2C240%2C1%29&skipMobileRedirect=1

Home Screen

The Home Screen displays a list of submitted forms that are in the review process. A user will see all current forms they submitted and/or are awaiting their review.
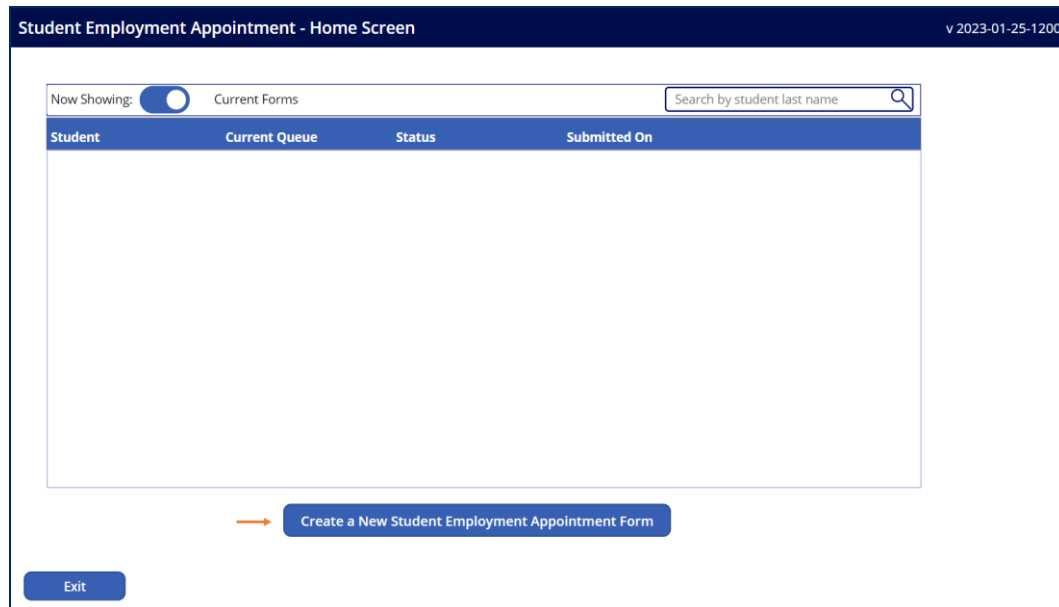
If the user switches the 'Now Showing' toggle (in top left corner) to 'All Forms,' they can view all previously approved forms they submitted.

Creating a New Appointment Form
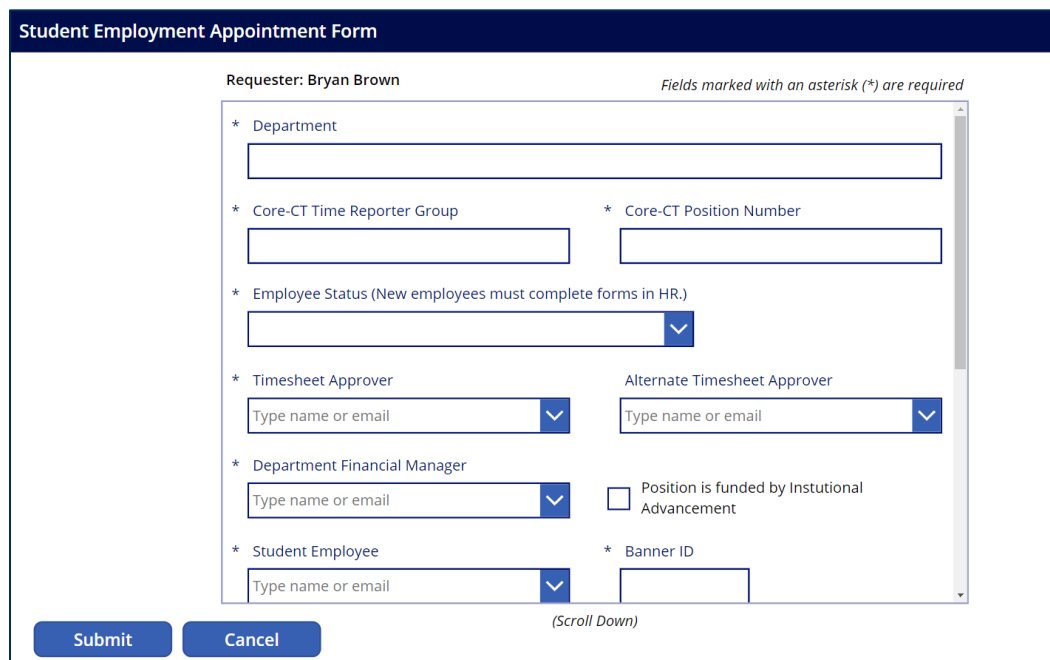
To initiate a new Appointment Form:

1. Open the Student Employment Appointment Workflow App

2. On the Home Screen, click **Create a New Student Employment Appointment Form**:

3. Complete the form. All fields marked with an asterisk are required:

a. *Core-CT Time Reporter Group* numbers (department location) can be found on the Human Resources website: wcsu.edu/hr/student-employment.
b. *Core-CT Position Numbers* correspond to the department budget (Please do not enter the Org Number).
c. If a student receives Federal Work Study, the Office of Financial Aid will update the Position Number accordingly.

4. Once the form is submitted:
    a. The form will be sent to the department's Financial Manager approval queue.
    b. Email notification will be sent to the department's Financial Manager.
    c. If the individual completing the initial form is also the department's Financial Manager, they can approve the form immediately after submission. They will not receive email notification (see next section).

Approving a Request (Department Financial Managers)

Requester is the Financial Manager

If the individual completing the initial form is also the department's Financial Manager, they will *not* receive an additional email notification.

Once the form is submitted, the Workflow App should open the completed form on the screen where it can be approved.
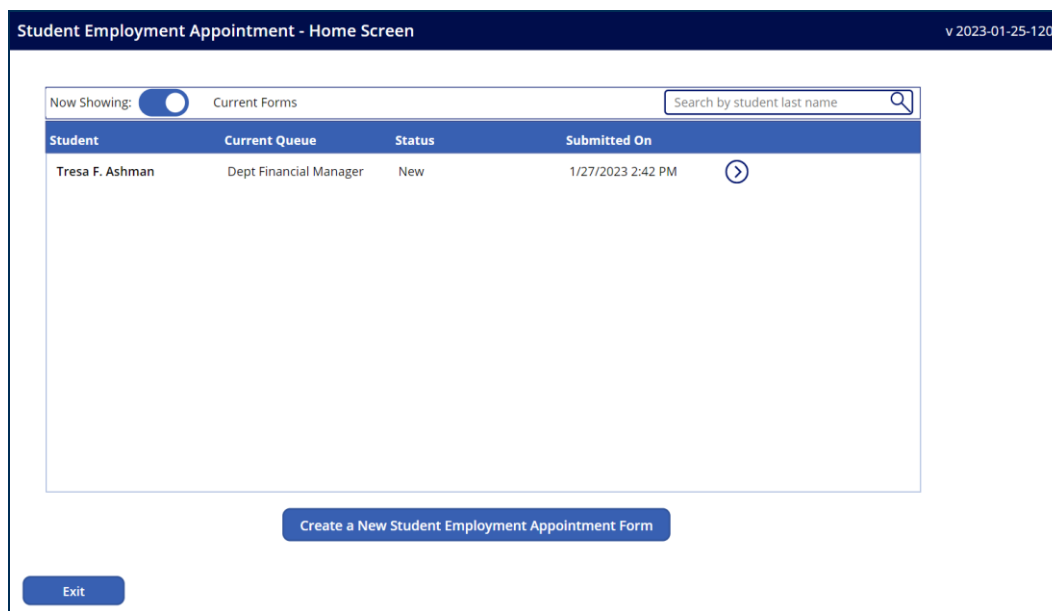
The Financial Manager should click the 'Approve Department Funding' button to send the request to the Office of Financial Aid & Student Employment for review.

If the Financial Manager closed the Workflow App prior to this step, they can go back into the App and the request should appear on their list on the Home Screen.

Requester is not the Financial Manager

The department's Financial Manager will receive an email notification that a new form is ready for their review. The email message includes a link to the Student Employment Appointment Workflow App.
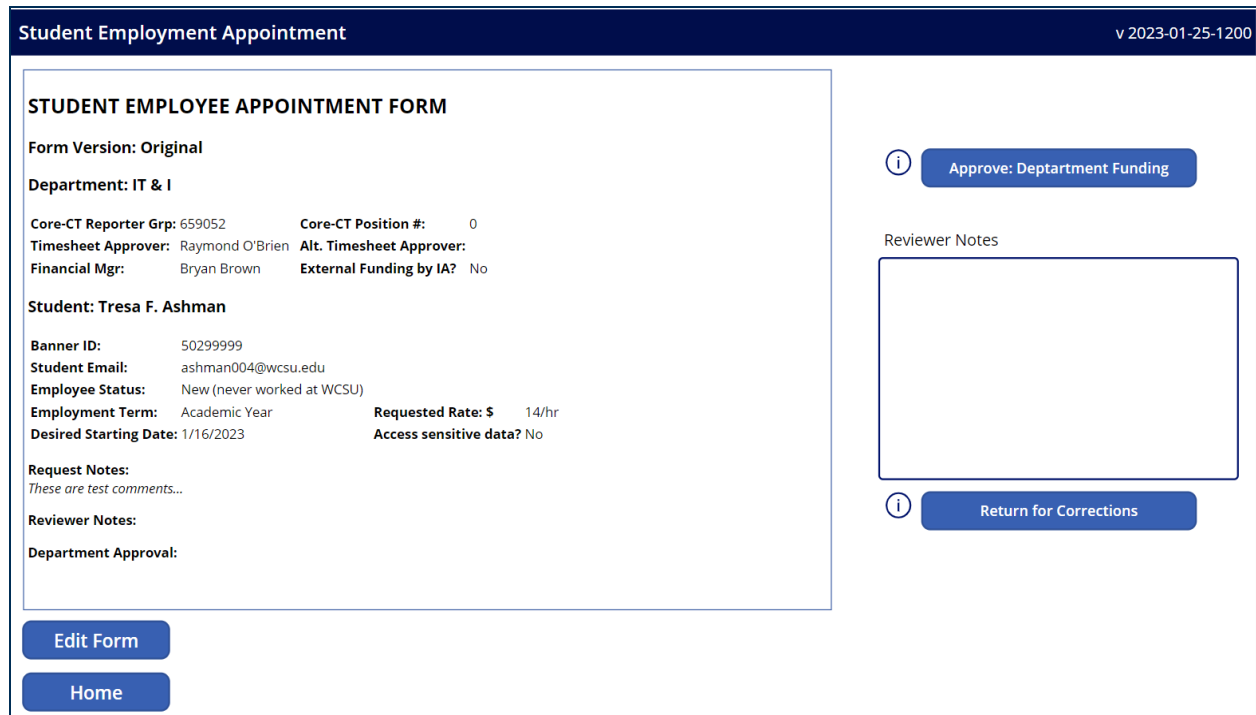
Once the financial manager signs-in to the Workflow App, the reviewer will see all forms awaiting approval:

On the Home Screen, click the right arrow ⊘ to open the form. Forms must be approved individually.

Note: By default, the list will contain only outstanding forms. To see previously approved forms, click the '**Now Showing**' toggle to switch to '**All Forms**.'

The department's Financial Manager can review the submitted forms on the details screen:

Student Employment Appointment	v 2023-01-25-1200

STUDENT EMPLOYEE APPOINTMENT FORM

Form Version: Original

Department: IT & I

Core-CT Reporter Grp: 659052	Core-CT Position #:	0
Timesheet Approver:	Raymond O'Brien	Alt. Timesheet Approver:
Financial Mgr:	Bryan Brown	External Funding by IA? No

Student: Tresa F. Ashman

Banner ID:	50299999
Student Email:	ashman004@wcsu.edu
Employee Status:	New (never worked at WCSU)
Employment Term:	Academic Year	Requested Rate: $ 14/hr
Desired Starting Date: 1/16/2023		Access sensitive data? No

Request Notes:
These are test comments...

Reviewer Notes:

Department Approval:

ⓘ **Approve: Deptartment Funding**

Reviewer Notes

[text box]

ⓘ **Return for Corrections**

Edit Form

Home

From this screen the Financial Manager can either:

1. **Approve the form**
   a. Their approval signature and date will be captured on the Department Approval line;
   b. The form will move to the Financial Aid & Student Employment queue;
   c. Financial Aid staff will receive email notification that a new request is ready for review.

2. **Return for Corrections**
   a. The form status will change to "Returned;"
   b. The form will be returned to the requester's queue;
   c. The requester will receive email notification;
   d. Details will be provided on why the form is being returned in **Reviewer Notes**.

3. **Edit the form**
   The reviewer can make corrections to the form by clicking the **Edit Form** button. Note: once the department's Financial Manager approves a request, the Edit Form button will no longer appear. To bring the Edit Form button back, click **Return for Corrections** to erase the department's Financial Managers signature.

Review Process: Financial Aid & Student Employment | Human Resources

After the department's Financial Manager approves the form, it will then be reviewed by Financial Aid & Student Employment and then Human Resources for confirmation. The requester can see where the request is in the process on the Workflow App Home Screen:

Student	Current Queue	Status	Submitted On	
Tresa F. Ashman	Financial Aid	Being reviewed	1/27/2023 2:42 PM	⊙

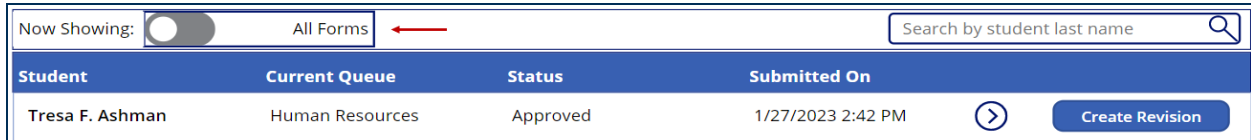| Student	Current Queue	Status	Submitted On	
Tresa F. Ashman	Human Resources	Being Reviewed	1/27/2023 2:42 PM	⊙

Final Approval

Once processed by Human Resources, the form Status is marked as "Approved" and a confirmation email with detailed instructions is sent to the student employee and timesheet approver. The student is eligible to begin working.

The approved form no longer appears on the Home Screen unless the 'Now Showing' toggle is switched to 'All Forms.'

Create a Revision to an Approved Form (*Pay Rate / Budget Changes*)

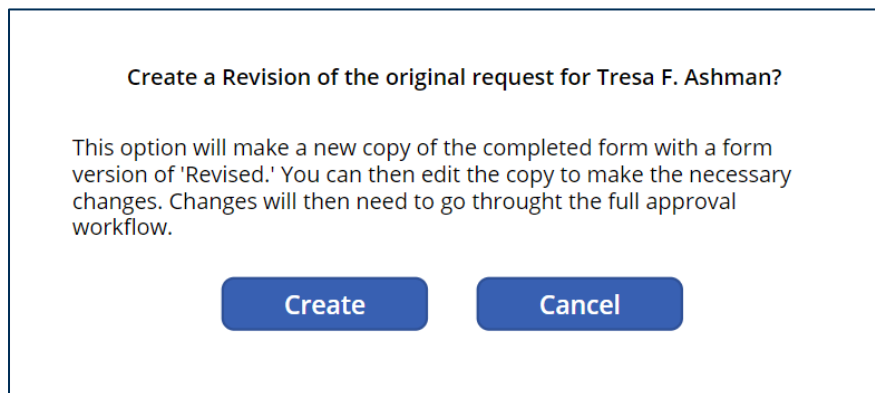To request changes to an existing employment form that has been approved:

1. From the Home Screen, change 'Now Showing' to 'All Forms':

Now Showing: ⬤	All Forms ←			Search by student last name 🔍
Student	**Current Queue**	**Status**	**Submitted On**	
Tresa F. Ashman	Human Resources	Approved	1/27/2023 2:42 PM	⊙ **Create Revision**

2. Locate the form to revise (you can search by last name in the search bar)

3. Click the **Create Revision** button. The following message will display:

> **Create a Revision of the original request for Tresa F. Ashman?**
>
> This option will make a new copy of the completed form with a form version of 'Revised.' You can then edit the copy to make the necessary changes. Changes will then need to go throught the full approval workflow.
>
> **Create**   **Cancel**

4. Click **Create** to create a revised version of the form.

5. Open the new form, select Edit form to make changes.

6. Click Submit to initiate the review process on the new form.