
The purpose of this presentation is to provide 3G process training for staff participating in the HR processing steps of 3G.

# What is a 3G?

We use the term “3G” to describe the three types of graduate student appointments at KU.

- Graduate Teaching Assistants (GTA)
- Graduate Research Assistants (GRA)
- Graduate Assistants (GA)

# Graduate Teaching Assistant (GTA)

- Duties must include direct classroom or lab instruction (cannot be "grader" only).
- Only 3G that is unionized & covered by a Memorandum of Agreement (MOA).
- Must have special permission from the School/College for *GTA portion* > 50% FTE.
- Minimum biweekly of $1008.522748, total 9 mo $19,594.16 per the current MOA.
- Always salaried
- Start and end dates are 8/18 -5/16 every year (for an AY appt) per the MOA, regardless of the start/end date of classes
- First-time GTAs who are also non-native English speakers must meet KBOR spoken English Proficiency requirements:
  https://ogs.ku.edu/ku-procedures-gta-spoken-english-competency
- Can be terminated only:
  1. if they fail to meet eligibility – Employee Relations sends a letter to terminate.
  2. If the student resigns voluntarily -
     - Student resignation letter confirming last date of work is required
     - Be sure to attach their email to the PAF.

Graduate Teaching Assistants perform tasks related to classroom or laboratory instruction. They are the only student group that is unionized and covered by a memorandum of agreement. GTA's are always salaried and because of the MOA, they have a minimum biweekly amount listed here, for an FTE of 50%. The start date for a GTA normally coincides with the first day of the semester.
Changes to a GTA appointment after they have accepted their initial offer letter, requires a new offer.

# Graduate Research Assistant (GRA)

- GRA portion FTE max is 72.5%
- At 40% FTE, tuition support required
- No teaching
- Always salaried
- Supervised by faculty or research staff
- Start date should be the first day they will start work.
- Recommend hiring with no end date if they expect the student to hold the appointment more than 1 semester.

Graduate Research Assistants assist with research related to their program of study. They do not teach or provide laboratory instruction like the GTA's.

The maximum FTE for a GRA is 72.5% and if they have an FTE of 40% or more, they are eligible for tuition support.

GRA appointments are always salaried. They do not have a minimum salary however departments are encouraged to pay similar to GTA's.

GRA's working during the summer are not required to be enrolled in the summer.

The effective date for a GRA should be the first day they actually begin working.

# Graduate Assistant (GA)

- max FTE of 50% for *GA portion* of appointment
- Position is professional & administrative in nature, but also requires expertise of a graduate student.
- All GAs must be hourly. *One exception:
  - GAs in the Higher Ed Administration Master's (HEGA)
  - HR staff receives a list of the 1st and 2nd year,
  - HEGA's have a salary minimum of $591.346154 biweekly.
- Creation of a new GA position (not backfilling) requires approval from the Office of Graduate Studies.

  New GA Request Form

Graduate Assistant positions are professional or administrative in nature with less than 10% spent teaching or performing research and the student must be enrolled in a graduate degree program.
GA positions are hourly.

Except: If their program of study requires a GA appointment as a component of graduation, then they would be salaried.

Each fall we receive a list of the salaried, Higher Ed GA's, we refer to as HEGA's.

HEGA's also have a minimum biweekly rate.

If a dept wants to create a new GA position, they should complete the GA request form that routes to the Office of Graduate Studies. This form is not needed when backfilling an existing or previously active GA position.

New GA Request Form, https://kusurvey.ca1.qualtrics.com/jfe/form/SV_ekOjSbSjhZhOnpl

If a GA is appointed at a FTE of 40% or higher, they receive up to nine hours of tuition support. The department is not obligated to sponsor the balance of tuition.

## All 3G's...

- Must be admitted & active in a graduate degree program.
- Must enroll in at least 6 hours in the Fall & Spring
  *Unless they are a post comp doctoral student & their program has submitted the appropriate form to certify them as full time with < 6 hours. No other reduced enrollment is approved.
- Summer enrollment is optional. If a GTA, it will be waived if they enroll.
- Must be in good academic standing (not on probation in Advising Tool).

When hiring a 3G student, there are several considerations to keep in mind. The student must be degree seeking, in good academic standing, and enrolled in at least six credit hours in the spring and fall.

- There are certain circumstances in which 3G employees can be enrolled in fewer than 6 hours – the student's home academic department would complete the appropriate petition if the student qualifies for an exception.
- Again, summer enrollment is optional.

Depts should consider the duties involved when assigning the type of 3G form to submit – teaching for GTAs, research for GRAs, or professional/internship for GAs.

## All 3G's...

- Are subject to a full background check.
- Max FTE of 72.5% with any combo of appointments
  - International max FTE of 50%
- Receive staff rates if ≥ 40% and appointment start/end dates meet Staff Rates Policy
  https://policy.ku.edu/registrar/staff-tuition-rates
- Eligible for subsidized student health insurance if ≥ 50% FTE
  https://ogs.ku.edu/graduate-student-health-insurance

All 3G's are subject to a full background check.

Any combination of appointments, is capped at an FTE of 72.5% or 29 hours per week. International students are limited to 20 hours per week.

Graduate students with an appointment of 40% or more are eligible for the employee rates benefit. This benefit allows them to pay tuition equivalent to in-state rates. In addition, required campus fees and off-campus area fees are waived. Other required fees such as course fees are not waived. For fall and spring eligibility, a GRA or GA must have an appointment that starts no later than ten business days from the beginning of the semester and must continue through the 60th class day of the semester.

KU offers graduate students who have a least a 50% appointment, the option to purchase student health insurance. More information can be found on the Human Resources website or the student can contact the Benefits Office.

## General guidelines – Sponsorships & Waivers

- GTA (tuition waiver)
  - FTE 40% or more = 100%
  - FTE 30% up to 40% = 75%
  - FTE 20% up to 30% = 50%
  - FTE 10% up to 20% = 25%

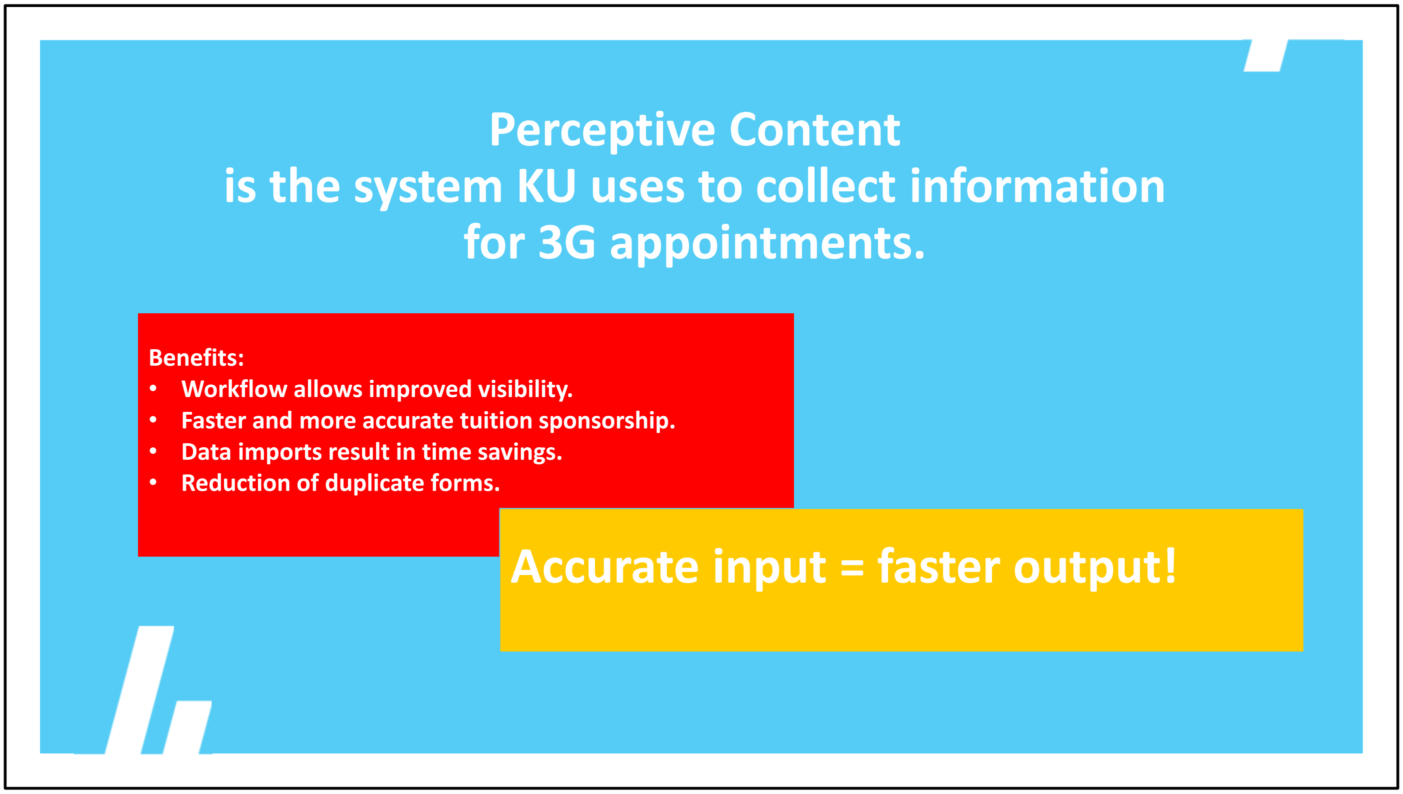
  - Campus fees:  40% or higher get 3 hours of campus fees

- GRA (sponsorship)
  - FTE ≥ 40% = 100% tuition required by sponsor
  - FTE < 40% = Any tuition coverage is at sponsor discretion
  - IDEEA may supplement if grant doesn't allow (pre-approval required)
  - Campus fees at sponsor discretion

- GA (University sponsorship)
  - FTE 40% or more = up to 9 hours only Fall or Spring
  - Additional tuition and any fees are at discretion of hiring unit

The student's FTE will determine how much of the sponsorship or waiver the student receives.  (GTAs technically receive waivers rather than sponsorships.)  See percentages on this slide

GA's receive up to 9 hours of tuition support per semester (centrally applied), but this does not apply to the summer session. Departments can choose to support any tuition or fees beyond this support, but it is not required.




We use Perceptive Content to collect information and generate reports. Using Perceptive Content has many benefits:
•it automates the workflow between processing stakeholders and data extracts to central offices – eliminating paper forms moving around campus offices
•it improves visibility and transparency – stakeholders can see where the forms are in the workflow and when they are complete.
•It offers faster and more accurate application of student tuition support
•it creates efficiencies for processors with less duplication.

••Perceptive Content provides quicker processing that benefits our students by facilitating accurate and timely pay and tuition benefits.

# How does the process start?

- Graduate student is recruited by the department
- Upon confirmation from student, the department initiates the 3G process.
  - Who touches the form?
    - Department staff initiate the 3G form (*)
    - SSC Finance or AMS Research staff add or validate funding details for GRAs and GAs
    - HR Transaction staff review position data information, audit compliance, ensure appropriate onboard path
    - KUCR Tuition team audits project-funded sponsorships
    - HR Appointment staff key Position data updates
  - Who does not touch the form?
    - Student Accounts & Receivables (SAR) – sponsorships
    - Registrar – staff rates, Budget Office – waivers
    - International Support Services (ISS), Financial Aid Scholarship
    - HR Talent Acquisition team loads hires into BrassRing and 2XO via daily extracts

**3G forms can be created and processed year-round in PC. However, our two main processing cycles are spring and fall. 3G queues are cleared, and new forms are loaded in the department queues based on HR Pay appointment information at the time of the load.

- Forms for the Fall semesters are loaded in mid-March.
  - Only the Fall forms are loaded. Summer appointments are processed by copying fall forms or creating new forms.
- Forms for Spring semesters are loaded in mid-October.

Once a candidate is recruited by the hiring unit and the student agrees to the work, the department initiates the 3G process by either creating a new form or updating an existing form in their department queue. The form will route through workflow based on selections made regarding that student's situation.
**HR staff will no longer submit forms on behalf of departments**.

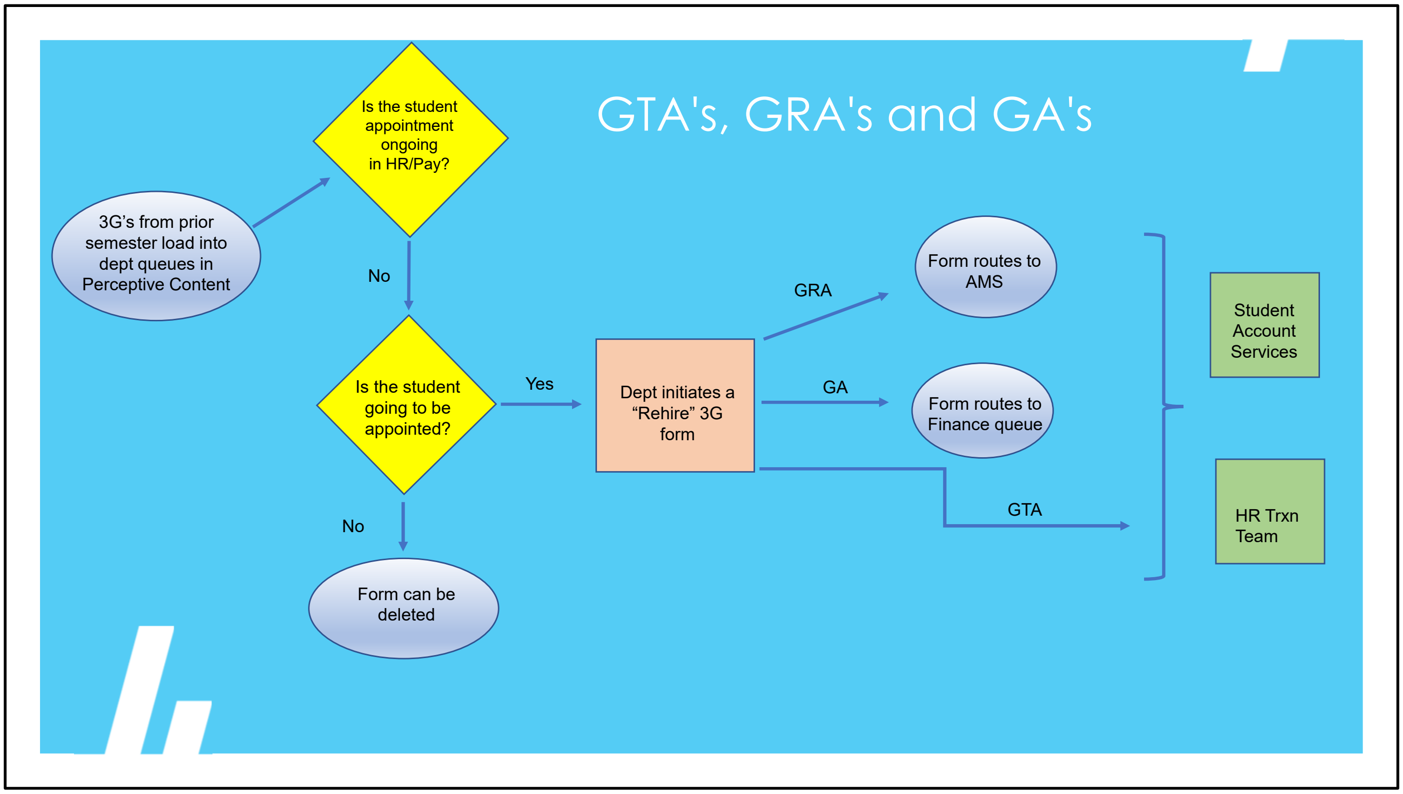
After the form is routed forward from the Department queue, it routes to one or more of the following teams:

- Finance SSC or AMS/LSI research staff, review and add funding and sponsorship information (for GA and GRAs respectively)
- HR staff, review all new hires, rehires, and position data updates
- KUCR Compliance & Audit, reviews sponsorship forms and reporting for policy compliance (project-funded)
- The HR Appointment team, keys the Position Data Updates

Central HR only touches the position data update forms. An automated upload to Brass Ring and then 2XO Onboarding facilitates the official offer process, and any needed onboarding.

## Other 3G stakeholder offices listed here do not work within the PC workflow, but they do utilize other tools for tracking:

- Student Accounts & Receivables (SAR) receives daily extracts with sponsorship details for entry into student financials.
- The Budget Office, Registrar and Student Information Systems (SIS) manage the application of employee tuition rates and waivers.
  - Because Employee Tuition Rates and Waivers are dependent upon active status in HR/Pay - timely 3G submission and processing are critical.
- International Support Services (ISS), Applied English Center (AEC), and Financial Aid and Scholarships (FAS) are in regular communication to ensure coordinated services.
- HR Employment receives daily extracts to upload to the recruitment and onboarding systems which generate the official offer and obtain required documentation and signatures.

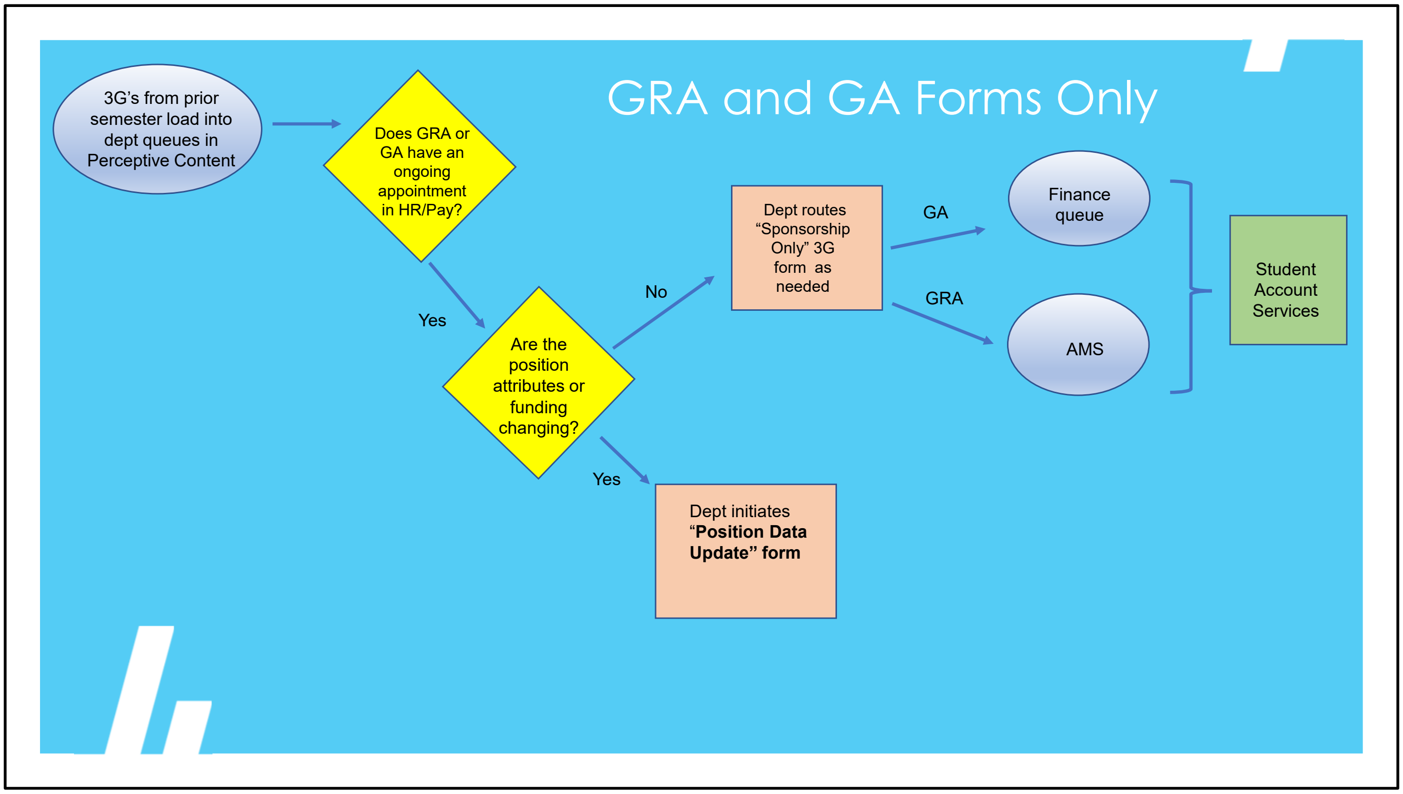



This slide outline the department decision process once the 3G forms are loaded into their queues in Perceptive Content. The load is based on logic as to what is active in HR/Pay and the end date at the time the upload occurs.

- All 3Gs with an end date preceding or coinciding with the end of the current semester appointment period prepopulate with a Rehire action code for the upcoming semester.

The department reviews and decides whether the student should be rehired for the upcoming term. If they have graduated or otherwise not being rehired, the form can be deleted from the queue.
For students that need to be rehired for the upcoming term, the department updates the loaded form and routes it forward.

GTA forms will route directly to the HR Transaction team as funding is typically standard dept funding.
GA and GRA forms route to SSC finance staff and AMS research staff for funding review and entry.




- GRAs that <u>do not</u> have an end date preceding or coinciding with the end of the current semester appointment period are considered an ongoing appointment and populate with a Sponsorship only action code for the upcoming semester.
- GAs with a termination date in HR/Pay after the end of the semester or no end date will not generate a 3G form, since departments are not required to sponsor.

If the student is a GRA or a GA with an ongoing appointment, the department needs to determine if any attributes of the appointment need to change. "Position Data Update" (PDU) action is used if any of the following things are changing:

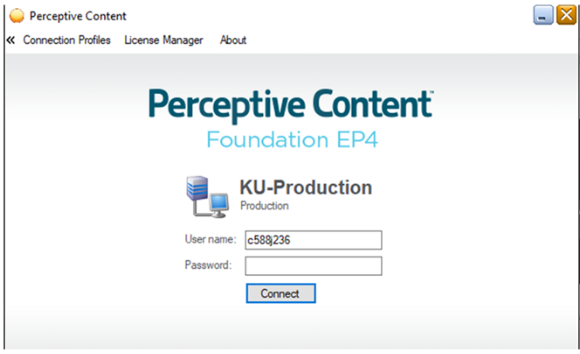
- Standard hours/FTE
- Pay rate
- Supervisor
- Funding

If so, the department will need to route a 3G form with the action of PDU. These forms do not route to BrassRing or Onboarding, but directly to the Appointment Team to be keyed. Think of these as being similar to a PAF – no offer is generated.
If the position attributes are not changing, and the department will only be sponsoring the student's tuition, they would route a form with the action of "Sponsorship Only." These forms do not route to HR.

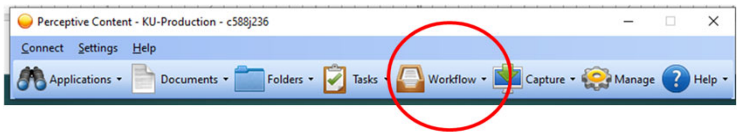
*Position Data Update can only be used for GRA's and GA's. GTA's have a contract and are covered by the Memorandum of Agreement. Any change to an ongoing GTA appointment should include an updated offer letter which is normally created by HR outside of the system.

*PDU forms submitted mid-semester should be reviewed with your Manager or the Appointment Manager --Sometimes a PAF is an easier solution.
*FYI on sponsorships – late or corrected sponsorships submitted mid-semester may not be eligible to route through the 3G workflow.
Departments should discuss with SSC Finance or AMS contacts to determine if they must submit those outside the workflow directly to SAR.

# Accessing the System

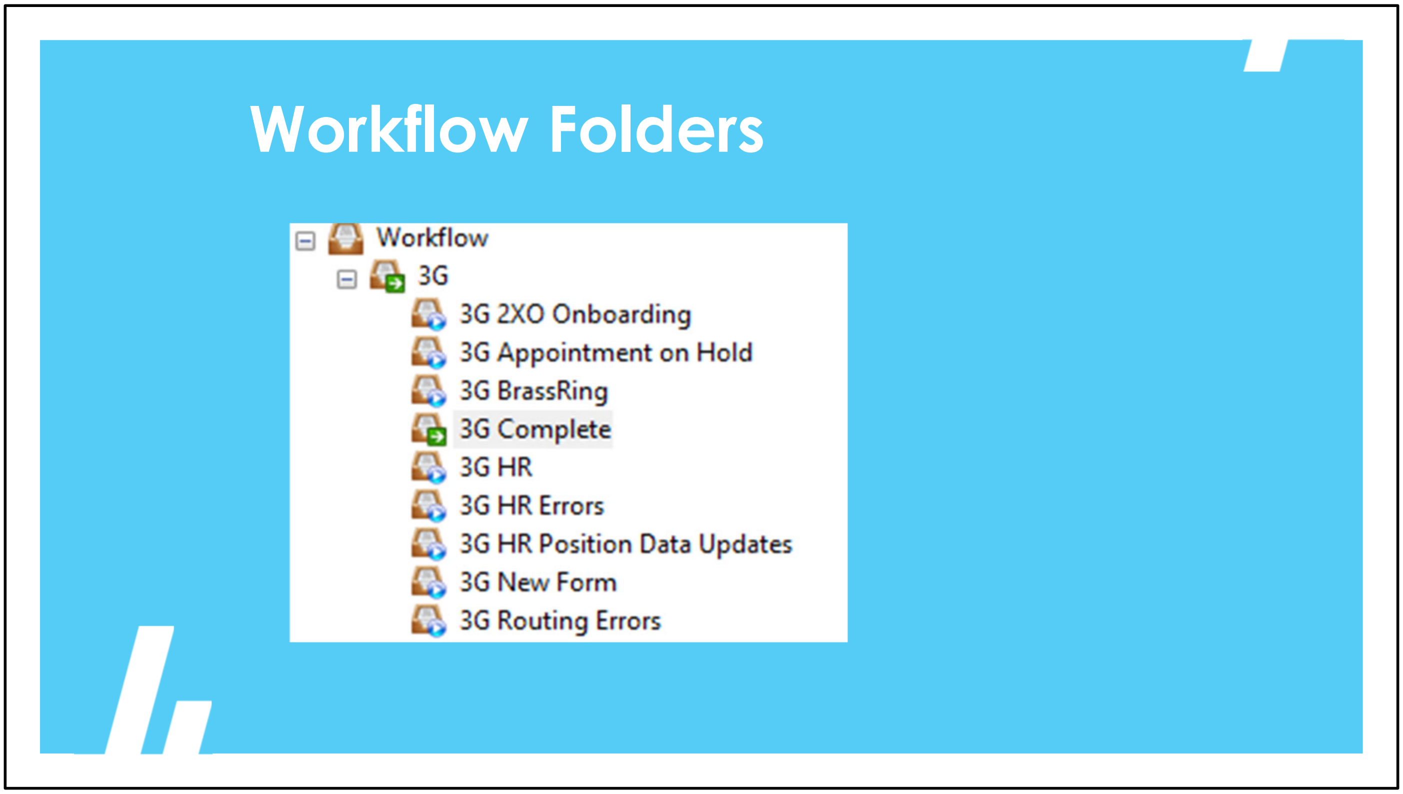

Select the Perceptive Content icon & login with your KU username & password.




Select "Workflow" to access your 3G queues.

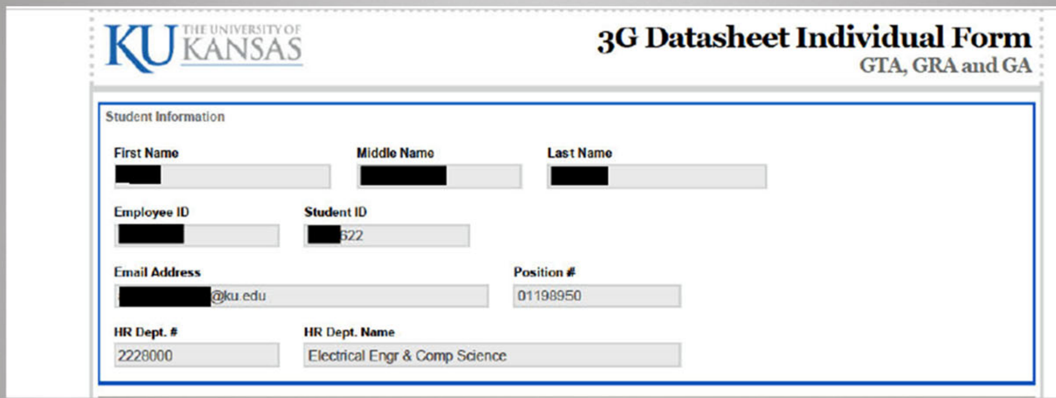
When processing 3G forms, we use the Perceptive Content client.   VPN(KU Anywhere) is required to access the ImageNow client from off-campus work locations.
Select the yellow spere icon and login using your online ID username and password.  Then select "workflow" from the menu bar to initiate and process forms.

If you are wanting to know the status of a form already submitted, you will need to search through the Documents tab.




Your user profile will determine which workflow queues are visible.

# Reviewing the 3G Form



THE UNIVERSITY OF KANSAS

**3G Datasheet Individual Form**

GTA, GRA and GA

Student Information

| First Name | Middle Name | Last Name |
|---|---|---|
| [redacted] | [redacted] | [redacted] |

| Employee ID | Student ID |
|---|---|
| [redacted] | [redacted]622 |

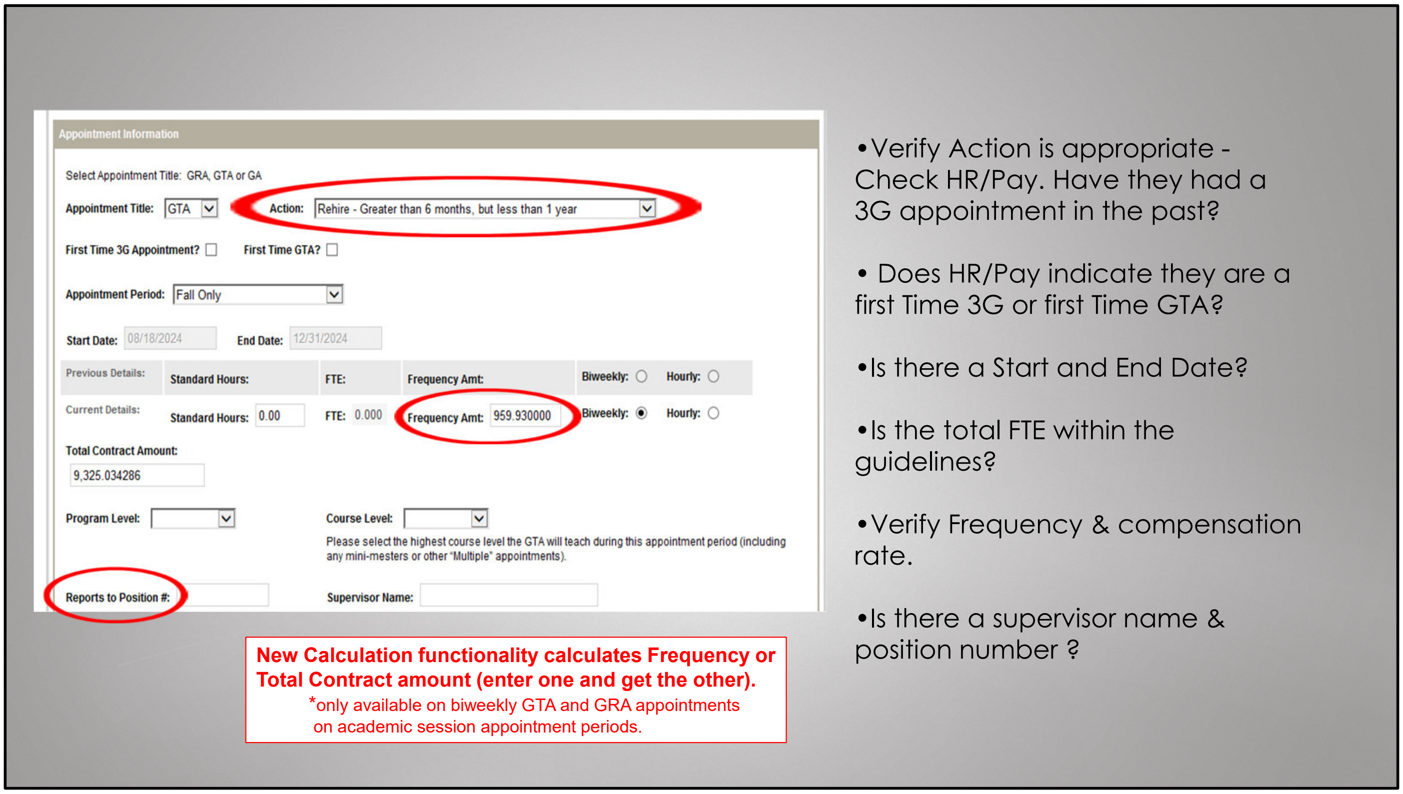
| Email Address | Position # |
|---|---|
| [redacted]@ku.edu | 01198950 |

| HR Dept. # | HR Dept. Name |
|---|---|
| 2228000 | Electrical Engr & Comp Science |

- **Check HR/Pay and 2XO Onboarding for concurrent positions**

- Student name should match HR/Pay (if applicable)
- Is the position number vacant & a 3G position? If a rehire, can reuse position number.
- Is a KU email address listed?

Once the 3G form routes to the 3G HR queue, the Transaction team ensures the information provided by the dept is correct.
Best practice is to first check HR/Pay to see if the student is active or has been on payroll in the past.
We need to check that their name is spelled correctly and that a vacant 3G position number is assigned.
Checking Position History in HR/Pay will tell you if the position will be vacant by the date on the 3G form.
Lastly, in this section, be sure a KU email address is listed. If it is anything else, it needs to be changed to a valid KU email address before routing forward.




In the Appointment section, verify that the Action the dept has selected is correct. According to HR/Pay, is the student really new or did they have an appointment with another unit last semester? Have they been off payroll for a year, or has it really been less than 6 months?
*If you find a form that has an inaccurate Action code, it's a good idea to check with your manager on next steps or contact the department and ask for clarification.

Confirm in HR/Pay history if the student is a first time 3G or a first time GTA.
HR staff do not need to audit the IDEEA spreadsheet, however you should ensure that IDEEA-approved GRAs have a frequency rate comparable to the GTA minimum.
Look at the start and end dates that are entered. If the dept selects an appointment period from the drop down, these dates will populate and these dates cannot be changed.

For Spring and Fall semesters, if the "Standard hours" listed are over 20, approval should be attached. Check HR/Pay to see if the student has another appointment on campus, their total hours should not exceed 29 unless that has been approved.
**International students should never work over 20 hours per week total between all appointments.**
*Summer is an exception. During the summer, these FTE limits do not apply and all students, including international students can work up to 40 hours per week.

Check that the frequency amount is reasonable and that the GTA & GA minimum salary requirements are met. The frequency amount listed should generally not be less than the amount for the previous semester without a compelling reason.

If the department selects an appointment period that includes a beginning and an end date, the system will calculate the biweekly amount based on the total contract amount entered or the total contract amount if just the biweekly amount is entered.

Be sure the correct supervisor position number has been entered.

## Calculating Biweekly Rate – GTA's & GRA's

| 3G Appointment Period | Start Date | End Date | Total # of Days for the Period<br>*GTA's & GRA's get 14 days of pay each pay period |
|---|---|---|---|
| Academic Year | 8/18/2024 | 5/16/2025 | 272 |
| Fall Only | 8/18/2024 | 12/31/2024 | 136 |
| Spring Only | 1/1/2025 | 5/16/2025 | 136 |

*GTA Minimum Salary
$19,594.16 or $1008.522748 biweekly

**Contract Amt** = biweekly amt / 14 days * total # of days

**Biweekly Amt** = total contract amt / total # of days * 14 days

GTA Minimum Rate Calculator - Use to calculate prorated minimum biweekly rate for GTA's.

The biweekly rate for GRA's will be calculated on a 14 day pay period instead of 10 days, like the GTAs. This slide reflects the appointment period dates and a link to the GTA minimum rate calculator.

# Calculating Biweekly Rate – GA's

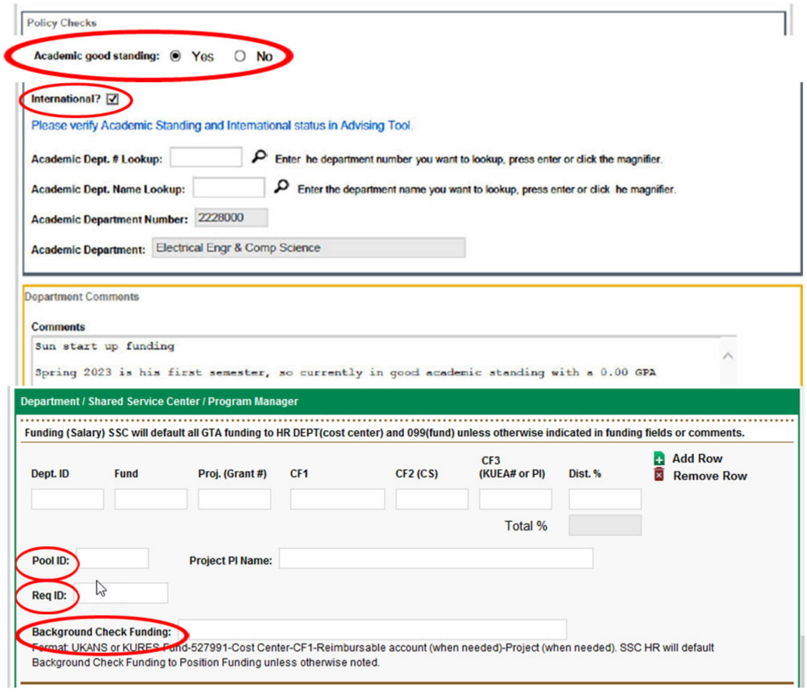
| 3G Appointment Period | Start Date | End Date | Total # of Days for the Period *GA's get 10 days of pay each pay period |
|---|---|---|---|
| Academic Year | 8/18/2024 | 5/16/2025 | 194 |
| Fall Only | 8/18/2024 | 12/31/2024 | 97 |
| Spring Only | 1/1/2025 | 5/16/2025 | 97 |

**Contract Amt** = biweekly amt / 10 days * total # of days

**Biweekly Amt** = total contract amt / total # of days * 10 days

**HEGAs are salaried, the minimum biweekly rate should not be any lower than the equivalent of $15.94/hour**

GA's are 10-day employees. As a reminder, Higher Ed GA's are the only GA's that should be salaried. All other GA's will be hourly.




- Does the Advising Tool confirm the student is International?
- Is the student new to KU ***AND*** international?
  - **If yes** – Always remove the background check funding.
- Did the department complete the policy checks?
- Review Department comments
- Verify the pool funding is set up and a pool ID is listed.
- Add the Req ID: XXXXXBR
- Add the date, comments, and your initials.

If the student is international and they are new to KU, remove the background check funding. This is because new-to-the-US students undergo a thorough Homeland Security background check.
If Int'l Student Services determines a background is needed, one will be ordered later.

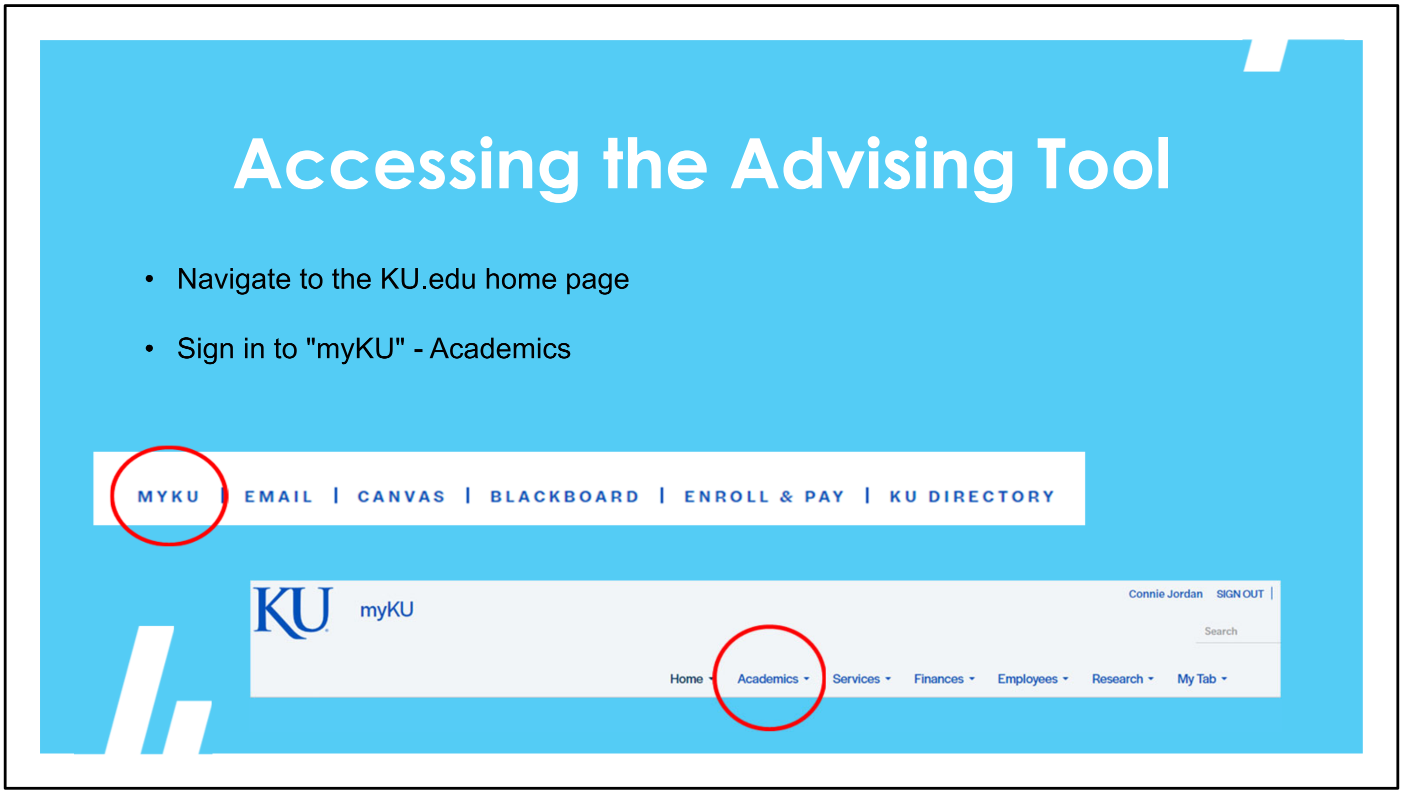
The Policy Checks are completed by the hiring unit. We just check that the fields have been completed. Since this is a department commitment, it is recommended forms with incomplete policy checks be returned to the department for completion.

Non-native speaking GTA forms must have the departmental interview <u>prior</u> to submitting the 3G form.

- Review the “Department Comments” for any important information relating to the appt.
- In the funding section, ensure that the correct Pool ID is listed. If a new pool ID is needed for non-grant funds, request the new pool and add a comment indicating as such, and route forward.

*If the student is a GTA and the funding section is blank, **we should enter the default funding, which is the HR dept ID and fund 099.** There is no need to reach out to the dept to verify or return the form.
The **"Req ID"** field is where you will enter the department’s BrassRing 3G req number. The department and title on the dummy req must match the form info or the student’s offer will be incorrect.

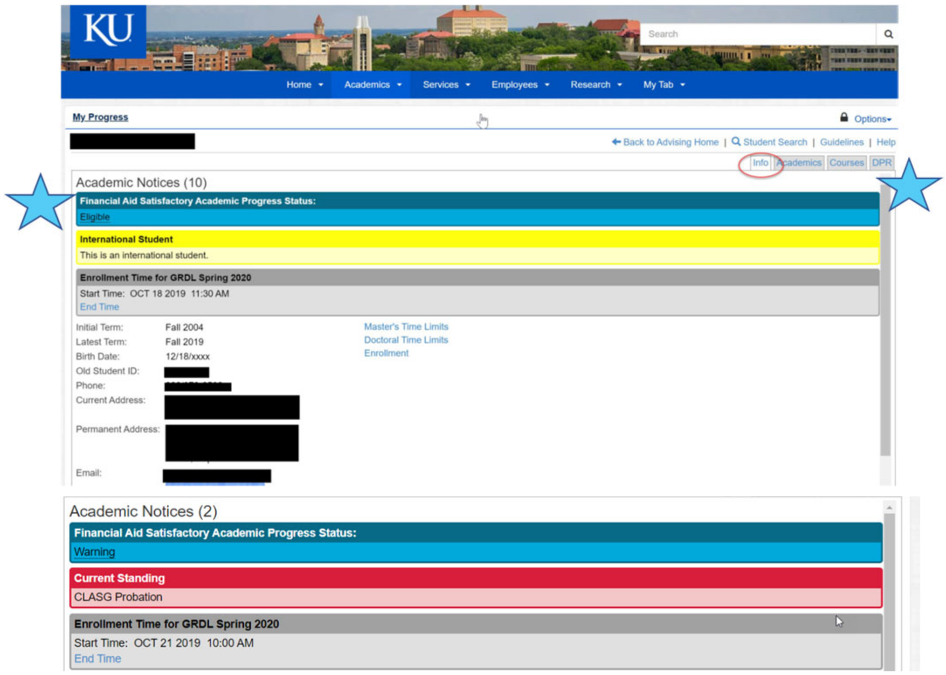
•Lastly, in the “Comments” section labeled **<u>Shared Service Center / Program Manager: comments.</u>** add a note that you have reviewed the form – including the date, your name, and confirmation that this student does not have any other appointments in OB’ing.




The Advising Tool is mainly used by departments, but it can be helpful to look at when you are reviewing a form especially if you are trying to determine if an international student needs a background check or if you need to look up SPEAK scores.

To access the Advising Tool, go to the KU.edu home page and click on the "Menu" icon on the left side.
Select MyKU and sign in with your username and password.
Select Academics.

To look up a student in the Advising Tool, you will need to enter either their name or their student ID from the 3G form.



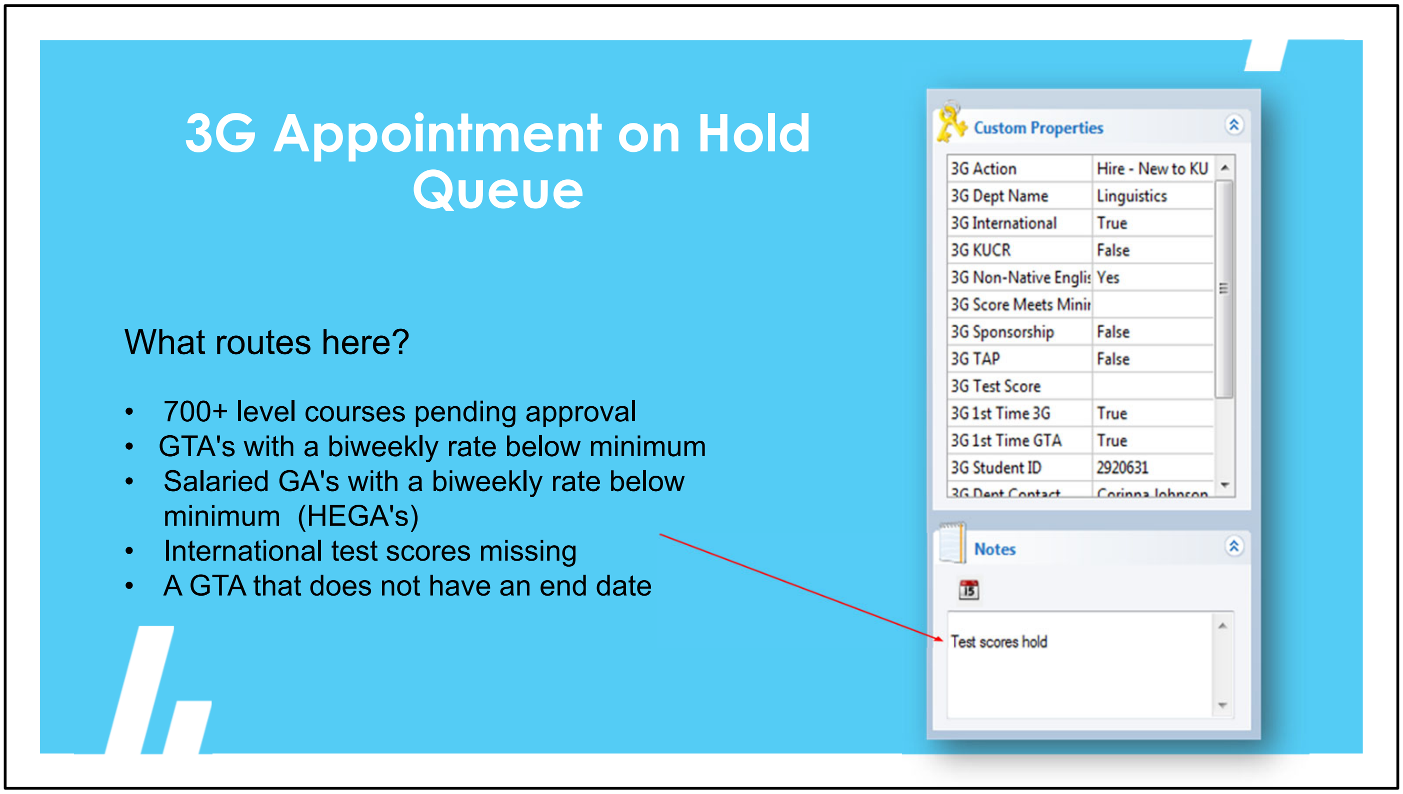

This is a sample of what a student record looks like in the Advising Tool.
The first page will have color indicators. A yellow banner is displayed for international students. A red banner indicates any "holds" on the student's record however, we should not hold 3G forms based on this. There are other checks outside our purview in place to ensure students are meeting the academic eligibility requirements.

The Academics tab is where you would find SPEAK scores for a non-native English speaking GTA.
The academic program can also be found in the Academics tab, which is a good check to make sure the department has indicated "out of field" when appropriate.

Note: if a correction is needed to the home academic department resulting in an out of field GTA, discuss with your manager sending the form back to the department submitter so they can complete the required compliance field(s).


GTA's assigned to teach a 700-level course or above must have approval from the Office of Graduate Studies. It's important to route the 3G form out of the HR queue so that the hold can be tracked. The form will land in the "Hold" queue. Once you receive an email that the petition has been approved for the student, check the Petition Approval Received box and route the form forward.

Note, some departments may have obtained the approval ahead of time – the helper text on the form now instructs them to attach the approval if it is in-hand at the time of submission.



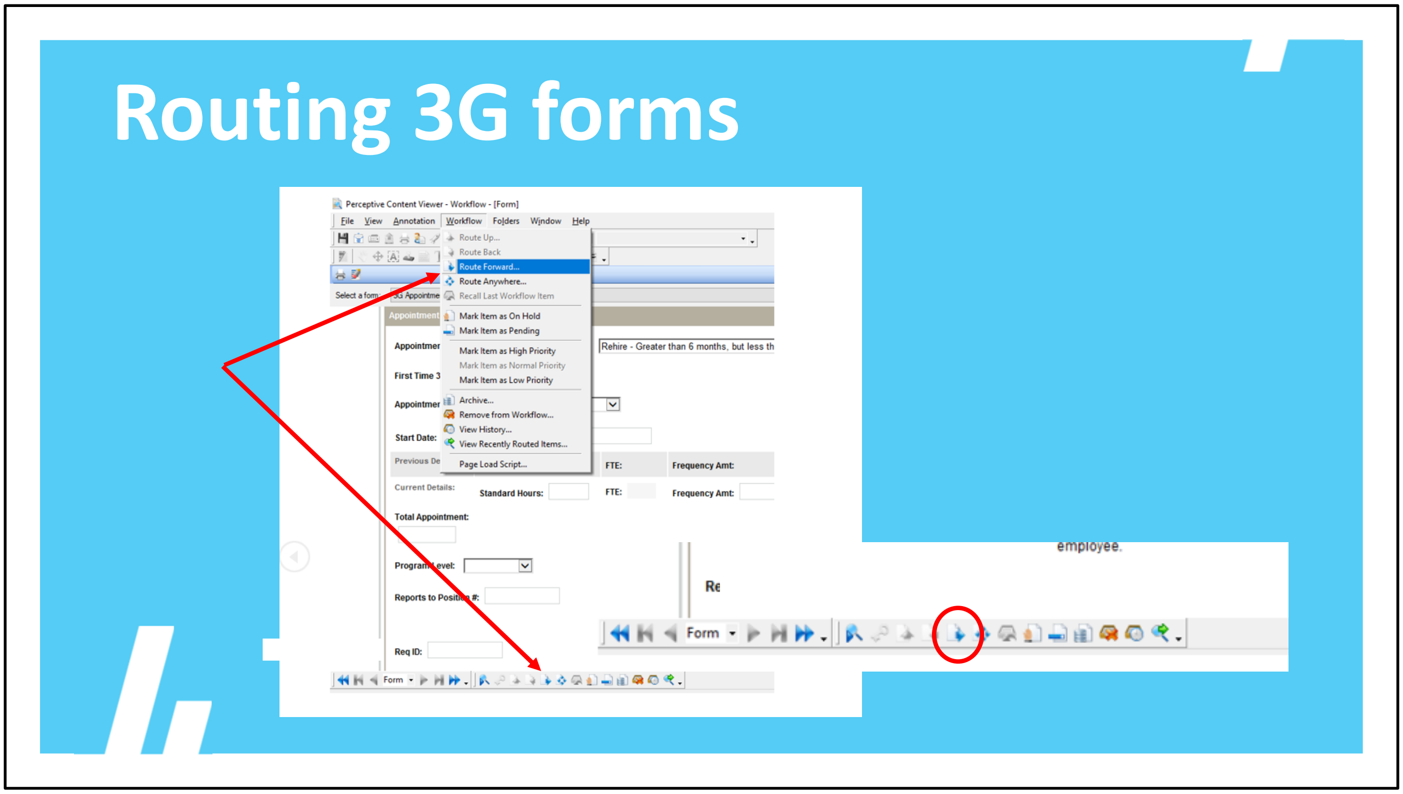

What types of things route to the HR HOLD queue?

- The Notes section of the form’s properties will tell you why the form is in the hold queue.
- You can view the notes by clicking on View > Properties
- The types of things that will route to this queue are:
  - GTA's who are teaching a 700+ course that need approval
  - GTA's whose biweekly rate is less than the minimum established by the MOA (**GTA salaries must always meet the minimum, even in summer.** The 3G script has been updated to catch these.)
  - Salaried GA's with a biweekly rate less than the minimum
  - A non-native English speaking GTA who does not have a SPEAK test score.
  - And a GTA appointment that does not have an end date.

*A couple side notes:

-the Hourly GA minimum is $15.94 per hour.

-GRAs do not have a minimum rate, however, to be approved for IDEEA departments must pay in line with the GTA minimum - we currently do not have a hold for this.




In the 3G system, forms move through the various workflow stages by routing.
When you are ready to move the 3G form to the next step in workflow, select “Workflow” from the menu bar and then “Route Forward” or you may also use the button at the bottom of your form.
Be sure you have checked that the student does not have any other appointments in OB'ing before routing forward.

# Notification to Student:

From: Employ@ku.edu,

subject: Action Required - KU Graduate Student Employment Information

Dear <StudentName>:

Typically, within seven to ten business days you should receive an email from KUHROnboarding@ku.edu that will require immediate attention on your behalf in order for you to be paid for the <AppointmentType> position with <Department> identified below. Failure to log-into the onboarding system (onboarding.ku.edu) and complete all required tasks may result in late paychecks and/or a delay in benefits (if eligible).

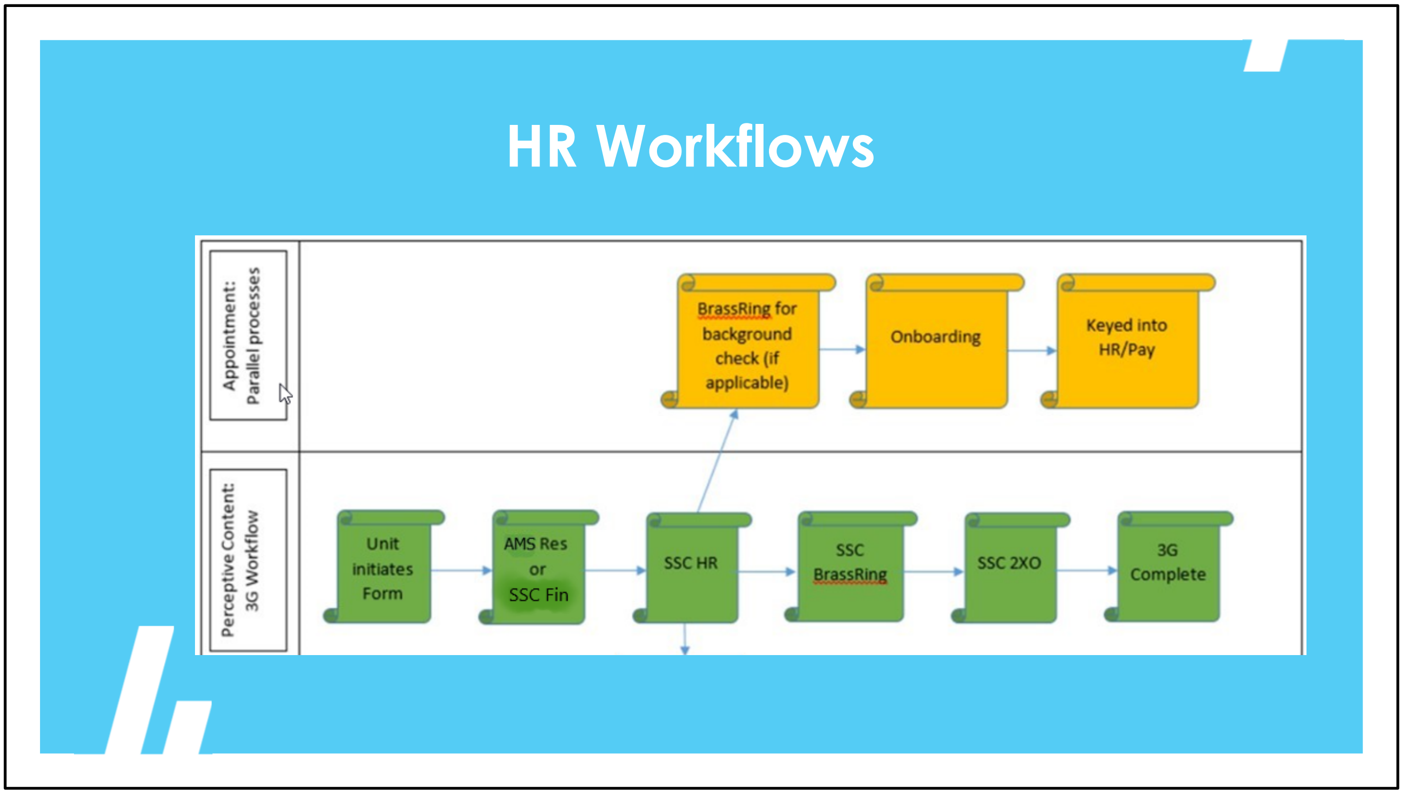
| Start Date | End Date | FTE |
|---|---|---|

On behalf of the University of Kansas and <Department>, we are excited about your employment and the enhancement it will bring to your graduate teaching, research, or professional experience. Your contributions in this role are important to the overall mission and goals of the University. Extenuating circumstances can result in the email from KUHROnboarding@ku.edu taking longer than 10 days. If you have any questions or concerns about your employment, onboarding steps, etc., please contact your hiring department immediately.

Sincerely,

Human Resource Management

Once the 3G form is routed out of the 3G HR queue, an automatic email is sent to the student alerting them that they should be receiving an onboarding invitation within 7-10 business days. So, it is important to stay on top of forms in your workflow queues.



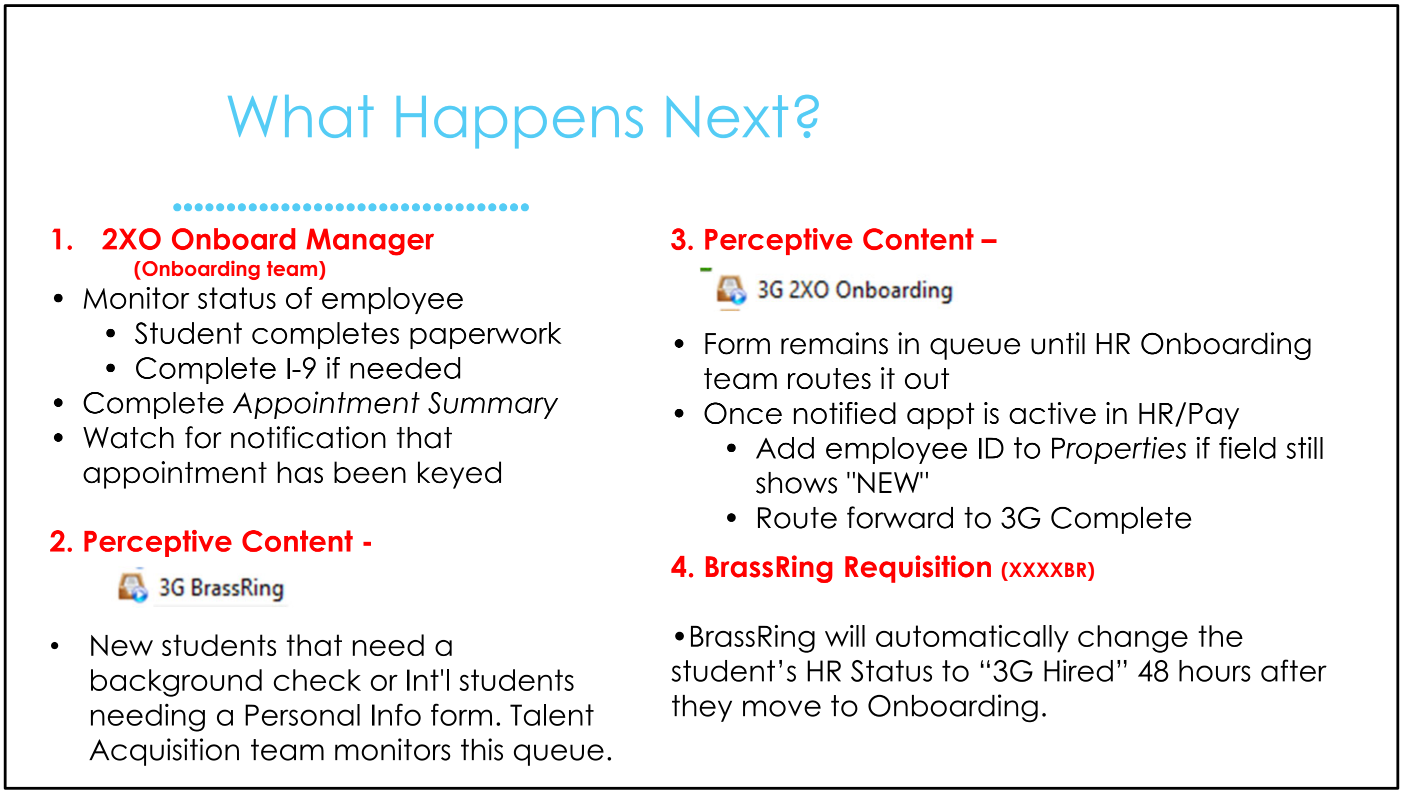

•This graphic helps illustrate the two parallel workflows HR staff need to monitor in both Perceptive Content AND on the appointment side.

•Once the form you just reviewed is routed forward, data is exported that is used to generate an offer for the student on the BrassRing requisition number you listed on the 3G form.

•These requisitions in BrassRing are only for 3Gs to route from Perceptive Content into Onboarding. They are not posted, and no one will ever apply to them. If a department wants to conduct a search for a 3G, they should coordinate with the Talent Acquisition team to post that in BrassRing just like any other student posting. Once they have selected a candidate, the dept would initiate a new 3G form in Perceptive Content and the form would then go through the workflow to generate an offer letter through the “dummy” req.

•In the yellow boxes shown, once the student has completed the background check request in BrassRing, **stop and confirmed that the student is not already in Onboarding for another position.** If they are, and that appointment is not showing as "Completed", then hold off routing your appointment forward. If you go ahead,  you will override someone else's position and delay the student being keyed.

• If everything looks good, go ahead and send them through to Onboarding.




So, what happens next?

Once the student is in Onboarding, the Onboarding team will monitor their status. They will work with the student to ensure they complete the necessary documents. And when they have finished, complete the Appointment Summary which then routes to the HR Appointment Team.

If the student is new and needs a background check, their form is going to be in the 3G BrassRing queue in Perceptive Content. Forms remain there until the student completes the request. Once the background check is done, the Talent Acquisition team will manually routed forward to the 3G 2XO Onboarding queue.

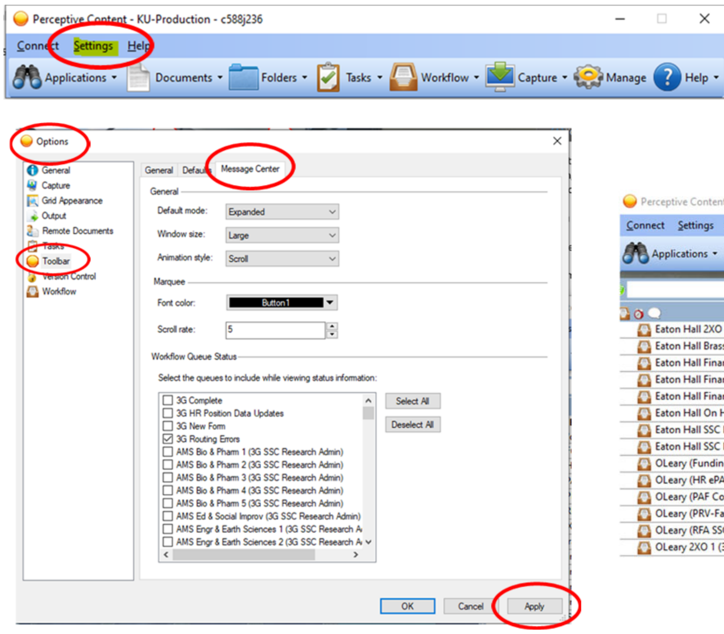
If the student is a rehire less than a year, the 3G form will skip the 3G BrassRing queue and go directly to the 3G 2XO Onboarding queue.

•Once you have received the notification that the student has been keyed into HR/Pay, you must manually route the student's 3G form forward out of the 3G 2XO Onboarding queue in Perceptive Content. At this point, the form will go to a final status of 3G Complete.

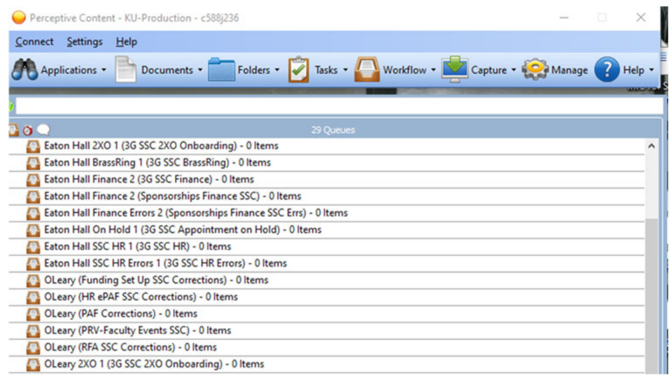
*As a 'best practice' if the student is a new hire, add their employee ID to the 3G form "Properties" in Perceptive Content before routing it to complete.

•In BrassRing, on the 3G "dummy" requisition, the system will change the student to "3G Hired" 48 hours after the student has been moved to Onboarding.

# Perceptive Content Shortcut




Setting up your Message Center allows you to see what queues need attention.




Because HR staff have one workflow but several queues to monitor in Perceptive Content, setting up your Message Center allows you to easily see what queues need your attention.
This slide will walk you through the steps on how to set up your Message Center by checking the boxes next to the queues you actively watch.
When you log into Perceptive Content, if you see a queue that has items in it, you can click on it from the message center instead of navigating through Workflow.

If anyone needs help setting up this shortcut, let me know.

# Correction Scenarios

- Who should be involved?
- Where is the form?
    - Can it be routed back?
    - Has an offer letter been signed?
    - Will a new email to student be generated?
- What needs to change?
    - Appointment type/job code
    - Funding
    - Compensation
    - FTE
    - Tuition
- 3G Form or Outside 3G Form
    - Can current form be updated?
    - Does HR need to submit changes?
    - What is the time involvement for all parties?
    - Can proper checks & approvals be collected outside 3G?
- Does the change affect Tuition Sponsorships?
    - Original sponsorship need to be canceled or modified?
    - Original sponsorship approved/process complete?

There are more scenarios and instances than we could cover today but here are some items to consider when the original plan changes or an appointment needs to be modified.

- To determine who should be involved – Please reach out to your manager for assistance as there are many factors involved and usually multiple ways to make changes. The solution may need multiple parties to participate in the solution.
- (Where is the form) – The location of the 3G form greatly effects the available solutions.
- It's important to know what needs to change – the best solution can vary depending on how many changes and what type of change is needed.
- (3G or Outside 3G decision) – Some checks and balances, as well as approvals, can only be accomplished through the 3G system. Other times, an (ePAF) or other resources can be used without going through the full process.

    - If the job code needs to change, such as GRA moving to GTA or vice versa, there can be a mixture of systems needed to accomplish the end results.

    For example, GRA moving to GTA.
    The GRA appointment needs a termination ePAF routed to the appt team.
    The GRA tuition sponsorship needs to be canceled with KUCR.
    The department then needs to initiate and route a GTA 3G form.
    The GTA Waiver is applied once the GTA appointment is entered in HR Pay

- If the change impacts the Tuition Sponsorship, the department can contact Beth Benfield in AMS to determine what action is needed.

## Spring 2025 Deadlines

**10.21.2024** – 3G Workflow opens for submissions from departments.
**10.31.2024** – Dept submitter deadline for supervisors, coordinators, PI's, etc. to provide 3G plans.
**11.6.2024** – Department submitter deadline to route all Spring 3G forms.
**11.15.2024** – SSC Finance/AMS/LSI deadline to route all Spring 3G forms to HR Trxn team.
**11.27.2024** – HR Onboarding team deadline to route all Spring 3G forms to HR Appt team.

**12.9.2024** – SSC Finance/AMS/LSI deadline to route project-funded Spring Sponsorship forms.
**1.2.2025** – Deadline to route Summer sponsorship forms to SAR
(SSC Finance – non-project funded; KUCR – project-funded).

**Keep in mind the general HR/Pay deadlines apply to all appointments:**

**5:00pm Friday prior to Pay Calc Monday for the effective date of hire - All background checks, personnel action forms, and applicant and onboarding tasks must be completed and sent to the HR Appt team to guarantee the appointment will be keyed for that payroll period. If received after the pay calc deadline, the appointment will be process and prioritized in receipt order with all other transactions for the following pay calc or off-cycle.**

Here are the upcoming deadline dates for Spring 2025. The deadline for Faculty/Supervisors/PIs is relatively new - department submitters are encouraged to use it in gathering information for timely submission.

These priority deadlines are critical to allow enough time for all the review and processing steps to happen for timely pay and benefits to students. We want to be sure we are processing forms as soon as they come into our queues to avoid:

- Adverse impacts to Financial Aid packages
- Late application of in-state rates
- Late tuition sponsorships
- Delayed Financial Aid refunds
- Incorrect bills
- Late access to Canvas for GTAs
- Late pay
- Stressed out students!!

# Who can I call for assistance?

- **3G functional questions:**
  - **First point of contact**
    - HR Transaction team
      - Hrtransactions@ku.edu
    - Your AMS support staff for project funds
      - https://research.ku.edu/pre-award-post-award-staff-assignments#section6906
    - Your HR or AMS Manager
- **General questions:**
  - Jody Milford (x3551), jmilford@ku.edu
  - Connie Jordan, cjordan10@ku.edu
- **Sponsorship/Funding questions:**
  - Beth Benfield (x3522), bbenfield@ku.edu
  - Chris Bell, chrisb42@ku.edu

- **Other resources**
  - 3G Policy, Roles, Best Practices
    - Graduate division staff in the hiring unit's school/College
    - Morgan Swartzlander, mswartz@ku.edu
  - KUCR
    - Kara McDowell (x7428)
    - tuitionkucr@ku.edu
  - Student Accounts & Receivables
    - stu.account@ku.edu
  - Budget Office for Late GTA's
    - Kevin Kenn, kpkenn@ku.edu
  - Access questions or system issues
    - imagenow_sn@ku.edu

    (reach out to a power user first for routing issues)

Should you have questions, or have a dept inquiring about a sponsorship, your first point of contact should be your manager before contacting Student Accounts.
These training materials will be housed on the People Support SharePoint site but if you feel additional training is needed or would like a 1:1 demonstration, please feel free to reach out.

# Questions?