UF | Training & Organizational Development
Human Resources
UNIVERSITY *of* FLORIDA

In order to complete a hire for a graduate assistant or fellow, a few simple steps are required. For all new graduate assistants and fellows: confirm eligibility requirements and gather paperwork, enter the hire in ePAF, complete a Letter of Appointment, and complete commitment accounting transactions.

This instruction guide reviews the process for adding a new Letter of Appointment in myUFL. For information on the requirements and paperwork, attend the PRO318 Hiring Graduate Assistants and Fellows workshop, or refer to the Academic Personnel website at:
http://www.hr.ufl.edu/academic/default.asp.

To learn about entering an ePAF or completing a commitment accounting transaction, navigate to the myUFL toolkits pages at http://www.hr.ufl.edu/training/myUFL/toolkits/default.asp.

STEPS

Starting the UF Grad LOA Screen in myUFL

1. Log in to http://my.ufl.edu using your GatorLink ID and password
2. Navigate to **NavBar > Main Menu > Human Resources > Workforce Administration > UF Grad Letters of Appointment > UF Grad Letters of Appointment**
3. Click the Add a New Value tab
4. Enter the **UFID** or click the magnifying glass to search for UFID (listed as EmplID, or Employee ID, in myUFL)
    a. Click **Look Up** after specifying information for the search (all names in the UF Directory are included in the search). From the list provided, click the name of the appropriate student to select and add.
5. Click **Add.** After clicking **Add**, the UF Grad LOA screen will be presented with the student's ID and name listed at the top.

Contract Data Section

1. Enter or select (using the magnifying glass view icon) the appropriate **Department ID**
2. **Offer Date** defaults with today's date. Change if needed
3. Leave the **LOA Active Box** checked. Once you have <u>saved</u> this Letter of Appointment, you cannot delete it. If you need to delete an LOA record, please contact Academic Personnel at 352.392.2HRS (2477).
4. Enter or select the proper **Job Code** (using the magnifying glass view icon)
5. Select the **Empl Rcd Nbr** (Employee Record Number) if available (using the magnifying glass view icon). An employee will have an Empl Record Number for each job occupied at the same time.
    a. If Empl Record Number is available, then FTE, Salary Plan, Annual Rate, and Compensation Rate will default once Empl Record Number is selected.
    b. If no Empl Record Number is available, leave blank. <u>IMPORTANT: Since the Empl Record Number is REQUIRED for processing, it is important that you return to input this number once it is assigned</u> (rather than **Add a New Value**, click the **Find an Existing Value** tab to return, following the navigational path described at the beginning of this guide).
6. Enter the **Begin Date** and **End Date** of the appointment. **Note**: these dates should reflect the begin and end dates of the semester(s) in which appointment is active
7. Check or enter **FTE**
8. Check or enter **Annual Rate.** Annual Rate for graduate assistants should match the compensation amount listed on the Hire ePAF or Job Data. For fellows, the amount entered as Annual Rate for

predoc fellows should be the amount of the fellowship and must be entered manually. **Note**: You must enter an Annual Rate (or have one default in when linking the Employee Record) in order to save the
LOA. **Reminder**: If an **Empl Rcd Nbr** can be selected, some of this information will display automatically.

9. Select a **Salary Plan** from the dropdown menu: o FELL=Fellowship
   o GA09=9-Month Grad Assistant o GA12=12-
   Month Grad Assistant   o GASU=Summer
   Appointment Grad Assistant

10. Click the **Refresh Waiver Terms** button **Graduate Assistants Section**

1. Enter information (**Special Conditions/Duties and Responsibilities**) associated with the graduate assistant appointment
2. Enter or select the appropriate **Supervisor ID** (UFID or EmplID). Return to this section to indicate when the graduate assistant has been evaluated or in the event you are unable to evaluate him or her. **Remember:** Graduate assistants should be evaluated once per appointment.

Waiver Terms Section

The options listed here display after clicking the **Refresh Waiver Terms** button**.** Note the numbering convention used for the Student Administration system:

- o For example, the term identified as "2128" equals the August 2012 term: "212" stands for 2012, without one digit
    "8," at the end, stands for August (the eighth month)

- o Session 1 will always mean the regular session:
    For example, for a summer appointment, the regular session is Summer C
    6W1 means the first 6 weeks (or Summer A)
    6W2 means the second 6 weeks (or Summer B)

1. Under **Waiver Requested**, select the proper waiver/fee combination for the appropriate term
2. Select the proper **Fee Residency** choice
3. Under **Matric Distribution**, click the associated hyperlink, which will be enabled as a result of these selections

Waivers by Term Screen (after clicking the link under Matric Distribution)

On this page, indicate the payment type and payment source for matriculation. Note: Departments can only input combination codes for which they have security. Accounts being paid from other departments must be input by Academic Personnel.

1. Under **Remission Type**, select from the following options:
    a. DIRC=Direct Charge. Indicate the **Combination Code** from which this waiver will be paid directly.

b. WVRA=Waiver Authority. Use this for state-sponsored waivers. Indicate the appropriate **Department ID.**

c. PAYR=Payroll. Select when the waiver should be paid over time in conjunction with the payroll cycle. Indicate the appropriate **Combination Code.**

d. LOTR=Lottery Trust Fund used by College of Engineering only. A **Department ID** is required.

2. Ensure that the percent of distribution equals 100 percent for every date range used. Indicate proportional payment over the course of the appointment as follows:

a. Add a different **date sequence** (top "Plus" (+) button located to the right in the "Waivers by Term" blue bar) and when combining PAYR with other Remission Types.

b. Within each date sequence, add multiple **Remission Types** as needed (to indicate proportional payment) by clicking the "Plus" (+) button located to the right in the "Matric Waiver Distribution" blue bar

c. To delete a date sequence or Remission Type, use the "Minus" (-) button accordingly d. Click **OK** when finished.

This will once again display the **UF Grad LOA** screen. Under **Full Fee Distribution**, click the associated hyperlink, which will display as a result of the selection made earlier in the **Waiver Requested** column**. Note**: Department LOA contacts can request security (UF_LOA_FEE) to enter **Full Fee Distributions** as well as **Matric Distribution.**

Waivers by Term Screen (after clicking the link under Full Fee Distribution)

On this page, indicate the payment source (Combination Code) for the fees.

1. Under **Remission Type**, DIRC=Direct Charge will default.
2. Indicate the **Combination Code** from which this waiver will be paid directly.
3. Ensure that the percent of distribution equals 100 percent for every date range used. Indicate proportional payment over the course of the appointment as follows:

a. Add a different **date sequence** (top "Plus" (+) button located to the right in the "Waivers by Term" blue bar)

b. Within each **date sequence**, add other **Combination Codes** (to indicate proportional payment) by clicking the "Plus" (+) button located to the right in the "Full Fee Waiver Distribution" blue bar

c. To delete a date sequence or Remission Type, use the "Minus" (-) button accordingly d. Click **OK** when finished

Reminder: If tuition or full fees are being split by departments, contact Academic Personnel to input appropriate information.

Saving the UF Grad LOA Screen

1. At the UF Grad LOA screen, click **Save** to complete the Letter of Appointment.

Security Roles Associated with LOAs
- o UF_LOA_VIEW
- o UF_LOA_INPUT
- o UF_LOA_WAIVER
- o UF_LOA_FEE
- o UF_LOA_STATUS
- o UF_LOA_PET_VIEW

Notes

No change can be made after the last day of classes. The LOA system does not process waivers after the last day of classes. All corrections made to an LOA after the system has closed must be completed manually through the Provost Office using the proper Journal ID form. Please contact Amber Allen (ameldot2@ufl.edu) if you have any questions.

A read-only petition screen is available to view the status of waiver petitions. Navigate to that screen via **Workforce Administration > UF Grad Letters of Appointment > UF Grad Waiver Status**

A new report was also developed to show the students who were missing evaluation dates in the system. The report will be available at: **Enterprise Analytics > Access Enterprise Analytics > Team Content > Human Resources Information > Workforce Information > Letter of Appointment – Waivers > Graduate Tuition Waiver Requests**.