

UMKC HR STUDENT MANUAL

Table of Contents

Work Study Office Assistant Duties.....	Page 2
Covering the Front Desk Responsibilities.....	Page 3
Answering the Phone.....	Page 3
Mail.....	Page 3
Faxing.....	Page 4
Printer/Copier Readings.....	Page 4
Dealing with People.....	Page 4
Seasonal.....	Page 5
Tax (W-2)	
Request for Duplicate W2 & Change of Address Form Process	
Job Applications.....	Page 6
Verifying Scanned Documents.....	Page 7
Linking (ImageNow)	
Prepping Files for Scanning.....	Page 9
Office Upkeep.....	Page 9
Ordering Supplies.....	Page 10
Checking In Supplies.....	Page 10
Adding/Updating Sessions to myLearn.....	Page 11
Adding Events to the HR Calendar.....	Page 11
Accounting-Cyndi Ferguson.....	Page 12
Reconciliations.....	Page 12
Payment Net- Purchasing Card Reconciliations	
Windstar International Tax Navigator.....	Page 14
Updating Work Authorization	

Work Study Office Assistant Duties

- Opening the mail: as needed
- Deliver and pick-up the mail: as needed
- Assist customers with the online application process: as needed
- Stock the orientation goody basket with snacks, 4-5 of everything once a week or as needed
- Check Orientation folder (blue filing folder in orientation cabinet) and make copies of documents: check (Thursday or when stocking orientation basket)
- Stock paper in copiers, printers, and fax machines in Room 225 & 226: daily
- Verify files on ImageNow and place in correct month to be shredded bin: as needed or delivered for rescan
- Inventory supplies: once every 2-3 weeks (Monday), use Supply Request folder in HR work groups under student and notify Tyler
- Put papers to be shredded in the correct bin: once a month, the day before shred date (see shred date list for dates)
- Print off Destroy Date Sign for confidential shredding: as needed (usually once a month when paper is shredded)
- Check in delivered Supplies and complete inventory checklist for Cyndi: when the shipment is delivered
- Scanning: as needed
- Front desk relief: as needed
- Check across the hall for PAF's and alphabetize: as needed
- Enter Performance Appraisals and Logs Data Entry: as needed
- Update UMKC HR Student Manual: as needed

Covering the Front Desk Duties & Responsibilities

Answering the Phone

1. "UMKC Human Resources, this is _____. How may I help you?"
2. Ask for name, question and department (if applicable)
3. If you do not know the answer to a question, determine and direct the caller to someone who does.
4. Find their number in the desk reference and transfer them by saying, "I'm going to transfer you to____, is that alright? Feel free to leave a message. Thank you, please hold."
5. If you are transferring the caller to voicemail (if they are selling a relevant to the office product, the faculty member is unavailable, etc.):
 - Hit the *Transfer* button and wait for a dial tone.
 - Dial 5000
 - When asked for a password, enter the person's number
 - When asked for an extension, dial the extension
6. If you put someone on hold, say "thank you for holding, this is _____. How may I help you?" after resuming the call.
7. If you do not know an answer to the question asked, say, "Can you please hold while I get that answer for you?" Find the information, or someone who would know the answer.
8. For sales calls, ask them to hold and transfer to voicemail
9. To make an outgoing call, dial 9 and the number you or trying to reach, UNLESS it is a campus number, then you only need the last four digits of the number

Mail

Mail needs to be taken down by 10AM

1. A slip needs to be filled out saying the type of postage, postage class and the number of items that need stamps. It also needs to be signed and dated. The slip should have the office MoCode and office name.
2. Mail goes in the mailbag and is brought down to the Mezzanine
 - i. After 11:30AM the mail can be picked up, stamped and distributed into personal mailboxes
3. ALL mail MUST be opened and stamped (except checks), even if it is personal mail, but be discreet in where you date stamp

4. When date stamping, be sure to stamp in an area where it is not covering any information.
5. Junk mail can be recycled

Faxing

In room 225:

- a. Make sure all paperclips, staples, etc. have been removed
- b. Count how many pages you have fed into the printer
- c. Place paper face down, head first
- d. For on campus dialing, just dial the extension
 - i. If it is an outside number, dial 9 and then the number for local calls
 1. Local is considered 816 and 913 numbers only
- e. Hit the “fax/start” button
- f. The machine scans and then sends. It is best to count the pages again after scanning
- g. The machine will dial and you will hear a tone
- h. Flashes “sending” until all the pages are sent.
- i. Wait for “Completed”

Taking Printer/Copier Readings

Copier in room 225

- a. Push the counter button
- b. It is button to the left side of the screen, click the
- c. When the screen changes, click the word counter on the screen.
- d. Write the numbers down
- e. Exit the panel

Copier in Room 226

Repeat steps from above

People

- If someone ask to see a particular person in the office; ask them for their name, and who it is that they wish to see, and if that person is expecting them. Also, ask what it is in regards to, sometimes people may ask for someone because that is the only person they know. This way you can direct them the right way.
- If they are international students needing a copy of a social security card, call Emma Satterfield because there may be additional paperwork that they need to fill out.

- If someone comes in to pick up something, make sure they show photo ID in order to verify it belongs to the correct person.

Seasonal

- **Tax Season: *Employees needing W-2***
 - Check the accordion in the desk to see if we have it, if it is not there then they will need to get onto the HR website. Click where it says HR forms on the left hand side, and then scroll down to “Request Duplicate W-2.” The forms are in alphabetical order.
 - Students needing 1098 forms
 - Go online to Cashiers page, and click the link on the page and enter information
- **Request for Duplicate W2 & Change of Address Form Process**
 - Make sure that the address and phone number is correct; Windstar is for international student/employees
 1. Log into WebApps (you may need Cyndi’s login to proceed)
 2. Go to “HR Production” add this to your favorites so you have easy access
 3. Go to “Workforce Admin.”
 4. Go to “Personal Info”
 5. Go to “Modify a Person”
 6. Enter the person’s employee ID number
 - If the number does not work then try adding a zero to the beginning if it is not there or taking away a zero from the beginning if it is there. If there is no ID then enter the name, but certain it is the right person if you must do this.
 7. Make sure that it is the right person, especially international’s as many have the same name
 8. Go to “Contact Info”
 9. If a change needs to be made
 - i. Go to “Biographical Details”
 - ii. Click on the “+” at the top, under “Name”
 - iii. Today’s date should show up
 - iv. Go to “Contact Info” again
 - v. Go to “View Address Detail”
 - vi. Click the “+” sign

- vii. Click “Add Address”
- viii. Make any changes and click “OK” through each screen then click “Save” when you are back to the original screen

****FYI**:** If a person has two separate addresses in the database for mailing AND home, then only change the mailing address. If they have different phone numbers then only change the home phone number, unless otherwise stated on the form

- a. Write “Updated” on the hardcopy, initial and date but ONLY if you have made any changes
- b. If no changes have been made then write a “v,” initial and date
- c. Return to Cory Kinder when completed so it can be scanned. It will then be sent to shredding
- d. To begin a new search, click “Modify a Person” at the top of the screen and follow the process over again

If you have any questions: Contact Cory Kinder or Tyler Robertson

Job Applications

- All applications are done online, no hard copies will be accepted
 - To direct someone to the online application
 - Umkc.edu/hr
 - “Career Opportunities” on the left hand side, under “Quick Links”
 - Scroll down and choose “Academic” or “Non-Academic”
 - Scroll down to search jobs, and click “yes” when the security box pops up. Search jobs.
 - All applicants MUST complete the application (work history), even if they have a resume uploaded
- **To check the status of an application (you must get access before you can do this)**
 - Go to umkc.edu/hr
 - Go to Web Apps, on the left hand side
 - Sign-in
 - Choose “PS HR PRODUCTION Database”
 - Sign into PeopleSoft

- On the left hand side, click “Recruiting”
- Click “Find Applicants”
- Unclick “Search My Applicants”
- Enter the last name of the individual
- Click “Find Applicants”
- The individual should show up listed with the position that s/he applied for, and the status of the application
 - *Draft* means that the application has been started, but not submitted
 - *Applied* means that the person has completed the application and it has been submitted
 - *Reject* means that the application has been rejected. It may not have met the requirement, or the position has been filled. NEVER inform someone of this decision, especially in person, direct them to Gaile Johnson or Kelly Limpic, and let them know the reason you are directing the person to them. Any further questions should be directed to them as well.
 - *Route* means that the application has been successfully submitted, has gone through HR, and is now being processed by the department that has posted the position. HR will not know anything further about the position until a decision has been made on a final candidate.
 - If the position has “closed” or been “removed” in the job title then this means that it is closed and they are no longer accepting applications. This does not mean a candidate’s application has been removed

DO NOT give ANY information out to the media. Refer them to John Allen (x1585, Room AC 317), and/or Wandra Green (x1601 Room AC 316)

Verifying Scanned Documents

- **ImageNow**
 - Sign-in
 - Select “Documents”
 - Enter the employee’s ID number

Check each document to ensure that it is readable

- On I-9's that have stamps, make sure that it is readable
- Make sure the number(s) can be read on the social security card, as well as the state, DOB, and the expiration date on the driver's license
- If something is not legible in the database, make a stick note that lists what is wrong. For larger portions, or when the text is minimal, use the red text letters.
- For corrections, adding a page online, or checking documents you cannot read, leave a post-it describing any changes that need to be made and leave it in "re-scan" basket
- Once a document is verified, it needs to be filed according to the date the HR Office received it. In the back cubicle by Cyndi Ferguson, there are boxes marked by the month the office received it along with the month those papers will need to be shredded.
- The documents are shredded 6 months after received by the office. At the beginning of each month, shred the stack of papers marked to be shredded that month.

Linking (ImageNow)

- To link, you must first sign into PeopleSoft and ImageNow
 - In ImageNow, go to "Work Flow" to pull up documents to be linked, choose "field 3" in the blue bar to combine documents by name, choose the name of the person you are linking for (Washington, Kinder, Ferguson etc...).
- In PeopleSoft, after signing in, go to "Modify a Person", type in the persons Employee ID or Last name from the document you are linking from ImageNow.
 - Once you pull up their file under "Modify a Person", click on the tab "UM ImageNow" (**NOTE:** it must be on this page to link!)
 - In ImageNow on the right side there will be a section called "Properties", under Properties, select the appropriate "Application Plan" (i.e. K-HR Employee, K-HR Payroll, K-HR I-9s etc...)
- Under "Document Keys" choose the correct drawer for the document to be placed, it should be the same as the "Application Plan"
 - Also under "Document Keys", select the document type (PAF/Additional Pay Forms, I-9, Direct Deposit, W-4 etc...)
- After you have selected those three things, click the little yellow key at the top of the "Properties" section (clicking the yellow key imports the information from PeopleSoft),

remember that PeopleSoft must be opened to the persons file (Modify a Person -> UM ImageNow) for which the document is for.

- After selecting the documents location and clicking the yellow key, on the same bar you found the yellow key, click the blue arrow (“Route Forward”) then click “Append” (**NOTE:** If a box comes up and it says Manual in bold, choose “K HR Complete”, this will also link it) You will know the document linked correctly if it disappears and a new document appears.

Prepping Files for Scanning

- Make sure ALL staples are removed
- Make sure ALL documents belong to that person’s files by checking the name on the documents.
 - Exception: some of the benefits may list a dependent’s name. These will remain in the file.
- Separate carbon paper from the forms
 - Throw carbon paper in the trash
 - Put extra copies of the form in confidential shredder
- Blank forms or instruction sheets that DO NOT have employees information on it will go in the recycle bin.
- On direct deposit forms
 - If form is a full page, tape the check at the bottom of the form, OR
 - If the form is a half-page, tape the check on the back of the form
- White-out social security numbers on direct deposit form(s)
- When finished with a completed box
 - Write a checkmark on the box
 - Initial and date

Office Upkeep

- Orientation Cabinet

Make sure that there are plenty of the following materials in the grey folder and baskets ready for the orientation. This includes:

1. “UMKC Acknowledgement of Receipt(Handbook Receipt)” flyer
2. “UQuest Admit One” magnet “Proof of Employment” card

2. Name tent card (Should always stay in cabinet)
3. New Employee Orientation Notes
 - a. On the Friday before orientation, print off the sign-in sheet of new employees who will be attending the orientation. Leave this on the facilitator's desk with the basket and number of packets. This is not mandatory, but a courtesy to the facilitator if you have any down time.

****Keep the basket ready for orientation.** Refill it and keep it looking nice. Pens and permanent markers must go in the basket as well and at least four to five of every snack**

- Printer/Copier/Fax
 - Make sure that the paper drawers are filled and ready to go
 - Keep a stack of UMKC envelopes by the printer(s)
 - This includes rooms 225 and 226

Ordering Supplies

Check these locations to make sure that everything is stocked:

- Orientation cabinet and drawers
- All printers and copiers
- All supply cabinets
- Drawers in refrigerator, where the water is kept
- Drawer in conference room for meeting supplies
- Coffee supplies under microwave
- Color paper
- Individual requests

The Supply List with all the items can be found in HR Student Folder Folder on your computer the list is titled "Supply List".

- It is easiest to print off a copy and put check and amount needed next to the items that need to be ordered, **ask to find out if we need more printer cartridges.** When checking the supplies use your best judgment to determine what we need. If you are not sure ask Cyndi.

Checking in Delivered Supplies

- Supplies will be delivered a couple of days after it is ordered
- Use the invoice Cyndi sends you to check the items the items that were delivered
- Put the checked in supplies in the correct spot (check the supplies list for reference if needed)
- Put the checked and initialed invoice in Cyndi's mailbox

Updating/Adding Sessions to myLearn

- Make sure you have access by talking to Kevin Sansberry.
- Under the “Talent Management” tab on the HR website, select myLearn.
- Login and click on “Admin” under Quick Links.
- Next find the Content tab and select “Course and Session Manager” when hovering over “ILT”.
- Once here, find the course manager tab; scroll down until you find the course that you are adding or updating (make sure the course is under UMKC).
- Adding a Session
 - Select the course in which you are adding a session to.
 - Click the button “New Session”.
 - Enter the start time for the session along with the duration (how long the session went).
 - Under administration, enter the capacity (if you know how many people signed up for the event, enter that number of people. If the number is unknown, the capacity number can be changed later on).
 - Select “Save & Exit”.
 - Click on the session you just made and confirm the course by selecting “confirm”.
- Updating and Completing a Session
 - Find the session that needs to be closed by looking at the dates.
 - Make sure the roster is completely updated. To add an employee, click “Manage Enrollments” and look up the employee. To add them, select the name (make sure it is an UMKC employee) and select the “add” arrow. If an employee is on the roster but did not complete the course, you may delete them by selecting the white flag on the left side of their name.
 - Once you are sure the roster is correct, click “Enter Results” and make sure all of the employees are checked as passing and attending.
 - When your roster is correct and all employees are marked as attending and passing, you may select “Complete” so the course is marked as completed and closed.

Adding Events to the HR Calendar

- Make sure you have access by talking to Kevin Sansberry.
- Go to <http://info.umkc.edu/hr/wp-admin/>
- Login using your SSO and password.
- Go to Events and Add Event.
- Enter the title of the event and select the date and times the event will run through.
- In the comments section, it is best to provide a link for people to access for more information. For an example, if your event is a session from myLearn, provide a link in which people can access to directly sign-up for that session. If you are unsure, look at other events to see examples.

- Provide a location; make sure to put the address because the system will give directions directly.
- Select the event category in which the event falls under (it is possible for there to be more than one category that applies).
- Create an event tag if applicable (some tags used are- Diversity, KCPDC, myPerformance, Pay Day, Supervisory, Other).
- The calendar is new as of February 2016, so if you are unsure of something, feel free to ask Susi Mickey or Kevin Sansberry.

Reconciliations

- Keep Purchasing Card Packets together (will be clipped together)
- WebApps
 - Go to HR website
 - On the left hand side select the link “WebApps”
 - Log in. You will need to have Cyndi Ferguson to log in for you
 - Choose “FIN Financial Reports”
 - Choose “Income Statements 1: Fiscal Year to Date Funds” and click “Go”
 - Dept ID is “K0308002”, press “Tab”
 - Business Unit is KCITY, and select the month
 - Click “Checklist” and sort by clicking “Account”
 - In the proper entry, check that the money amount matches that on the receipt.
 - Check the box under “Checked”
 - Select the source or description to see if there are any transaction notes
 - If there are no transaction notes, in the comments section, make a detailed note about what was purchased
 - For example: not “office supplies” but “tissues, pens, etc.”
- Misc. Revenue Non-taxable
 - Click the Journal ID
 - Make sure that the checks add up to proper amount and the dept. from in the description, “[department] manual check for ____.”
 - To find the department, you will need to search for it using the Dept. ID listed and through Peoplesoft
 - Make sure to include all the names

- For Mail Charges
 - Staple all Postage Charge Memorandums for the month together and file.
- For Phone Charges
 - 724000—Telecom Service—monthly phone service (should be around \$500-\$600)
 - 724700—Telecom Service—long distance charges (should be around \$100-\$200)
- Hit “Save”
- On each receipt write the month and fiscal year (ex. Nov. FY 16), and your initials, For Purchasing Card packets only write on the first page.
- When completed file in large gray file cabinet outside of Cyndi Ferguson’s office in third drawer, file purchasing card packets in purchasing card folder and all other receipts and invoices in the correct month and year
- Give all receipts and invoices that need to be researched or you did not find to Cyndi Ferguson

Payment Net- Purchasing Card Reconciliations

IMPORTANT NOTE: Always keep in mind that every transaction should be able to stand on its own in case of an audit. Whether it is the receipt or the actual reconciliation transaction in PaymentNet there should be enough information that there is no question what any payment was for.

1. <https://www.paymentnet.jpmorgan.com> (Cyndi will need to sign-in)
2. Hover over ‘Transactions’ tab and click on ‘Manage’ in upper left hand corner
3. Do not enter a check mark in any of the boxes on this screen. The checking of the ‘reviewed’ box will take place once you are within & editing the individual transactions.
4. Start at the end of the list, which is actually the beginning of the statement period (page back & forth if necessary in top right corner under View Statement button). NOTE: not all transactions will be reconciled, only those in current statement cycle which ends the 24th of each month.
5. Click on transaction & find corresponding receipt in folder verifying amount
6. Do not change or enter anything in the following fields:
 - a. ‘Chart of Accounts’
 - b. ‘Edit Complete’
 - c. ‘Job Number’
7. Change the ‘MoCode’ & ‘PS Account’ if necessary.

8. In the comments section, write a brief description. Be sure to keep it short and to the point.
9. If there is additional description, further explain in the Transaction Notes box at the bottom
 - a) For food purchases, if there are less than ten people who attended, names & titles need to be written in the Transaction Notes box
 - b) For brief comment of job posting ads: **position # - abbreviated job title**
 - c) For detailed position description, information is taken from job posting document provided by recruiters:

“On line ad with **company** for position **position # - job title** as requested by **Dept Contact** **date** using MoCode **MoCode #**.”
 - i. Double check your entry for accuracy & then check the ‘Reviewed’ box
 - ii. Click “Save” button at top left
 - iii. Use arrows in top right to move to next transaction OR click on ‘Return to Transaction List’ to find a specific entry
 - iv. For a split-funded entry: (most commonly Kansas City Star)
 - a) Click on “Add Lines” at the top left of the page
 - b) Enter number of lines needed & click ‘Add’ button
 - c) Detailed description goes in the Transaction Notes at top
 - d) Under ‘Item Description’ replace “Commercial Card Purchase” with a brief comment of that particular line item.
 - e) Under ‘Unit Price’ correct the amount for that line item if necessary and then to the left, click the arrow above the item number.
 - f) Correct ‘MoCode’ & ‘PS Account’ as appropriate, add a brief comment in the ‘Comments’ box, review for accuracy & check the ‘Reviewed’ box on the right.
 - g) Click “Save” button at top left
 - h) Repeat steps d-g for each line item
 - v. **On receipt please date & initial lower right corner**
 - vi. When finished with all editing, click ‘Log Out’ button in upper right

Windstar International Tax Navigator

Packets include:

- Tax Assessment Form (2 pages)
- Social Security card (they may not have one, its ok if they don't)
- Visa
- Passport
- I-20 Form (DS-2019 or I-797)

If any of these are missing, besides the Social Security Card, talk to Emma.

****Emma must be signed in International Tax Navigator under "Recipient Setup and Processing"****

Areas to check: "Recipient" and "Immigration Details"

- Click "recipients"
- To search click the binoculars and enter name; if "not found" appears after typing in the last name then close and click "add," if the name is already there then click "change" (make sure it is the same person by comparing I.D. #)
 - Verify using PeopleSoft: Modify a Person and/or Job Data. If things on the form don't match with PeopleSoft, talk to Cyndi)
- Click "last name," Type in the last name into box, hit enter
- If it is there then click "change," if not click "add"
 - Under Basic Info tab
 - Enter name, DOB, SSN (if they do not have one then click "applied for SSN"), Put Student ID in Org. ID, Payroll ID and Student ID blanks and pick the correct campus
 - Click "Ok" and "Okay to save with errors" UNLESS: if it comes up that the person is a duplicate then contact Cyndi. However, verify that it is actually a duplicate first by the DOB, full name, country, etc. If it is indeed a duplicate then click "okay to save with errors," then "delete"
 - Personal Info Tab
 - Click "Change" to begin
 - Enter the Department (this can be found under "Job Data", Occupation (these can both be found using PeopleSoft under "Job Data", home phone (verify using the second page of the Intake form), email (you can copy and paste this directly from PeopleSoft, under "modify a person" in the "contact info" tab. Also the

primary email should be the UMKC email, to add a second email put a semi colon after the primary email)

- For Occupation, in PeopleSoft, go to “Job Data,” and make sure the search “Include history.” If their title includes anything dealing with being a student assistant then you only need to put “Student Assistant.”
- If something is different on the form than in PeopleSoft then contact Cory or Cyndi
- U.S. Address Tab
 - Get from form, but verify using PeopleSoft
 - After entering the address line(s), enter zip and click “find city using zip code”
 - Add 4 digit extension to zip code
- Foreign Address
 - Enter international address that is on the form, and ***must*** enter country
 - You may look up the province using Wikipedia or another search for accuracy, but it isn’t necessary. If looking up India, you may use the India pin code to find it
- Country Info
 - Enter passport number and passport exp. date
 - Use the actual copy of the document, if you can’t read it then use form
 - If the number isn’t very readable (it can also be found on the first page of the form) then write it down on the form so that when it is scanned it may be seen
 - Make sure that you fill in information on each tab across the top
 - Hit “okay”
 - If a screen pops up with errors, double check the errors and then click “Save with Errors,” for each tab after basic info you’ll need to click “change” in order to add info

STEP 1: For Salary/Default Income 1

- Check “Has Employment Income” box
- In PeopleSoft under “Job Data” go to “Payroll,” to see whether they are bi-weekly/monthly, then go to “job info,” click on “Earnings Distribution” at the bottom to get the pay rate

- To Calculate: Monthly employees: multiply compensation rate by 12
- Bi-weekly employees: multiply the hourly salary
 - X2080 for fulltime
 - X1040 for 20 hours
 - X520 for 10 hours
 - X260 for 5 hours
 - Enter this amount for Employment Income
 - If they are an F1 then check “has nonqualified scholarship...”

STEP 2: For “has nonqualified scholarship...”

- If they have an **award**, then enter that amount (found on the I-20, line 8b). If nothing is entered on line 8b then enter “\$10” as the amount

STEP 3: At bottom of page, go to “pay cycle” and enter biweekly or monthly

- b. Default Income 2
- Comes from the Intake Form
- Drop down for Student Types (found on line 4 of I-20 form)
 - Master’s means they are a grad
 - Doctoral is post-grad
 - If they have a graduate degree but are taking classes then they are post-grad
- c. PeopleSoft can be used to cross check information
 - i. “Workforce Administration”
 - “Personal Info”
 - “Modify a Person”
 - Employee ID
 - Name match on social security card
 - “Contact Info”
 - Address match
 - Phone match
 - Email match
 - ii. “Job Information”
 - “Job Data”
 - Effective Date

- Department
 - Position Title
 - Employment Income
 - Pay Cycle
- d. Click Okay to Save then go to “Immigration Details”
- i. Immigration Details
 - Click “add,” the default is F1 for status/visa type (change if different)
 - Enter Visa number; start date (visa issue date); first day in US (stamp on visa) and last day(found on I-20 or DS-2019, line 5 “not later than” date)
 - First day is date on I-94 or stamp on Visa
 - Last day in the US is work authorization date, can be found on I-20 or DS-2019, line 5 “not later than” date.
 1. **If they are NOT an F1** then follow what’s on the form under “current immigration status” and their “primary activity during this visit”

Note: If it is the original I-20 then there will be a stamp on it

- a. F1 students get an I-20
 - b. Contents of the packet include: Assessment form, SSC (but they may not have one), passport, visa, work authorization (F1, need I-20; J1 or 2, need DS-2019), Employment authorization card or permanent resident card but these last two are only needed if they do not have any of the listed work authorizations
 - e. When complete, initial and date and give back to Cyndi Ferguson
- **Work Authorizations (Date change)**
 - Have Cyndi log you into Tax Navigator
 - Go to “Immigration Details” click the binocular and search for name, the name should come up.
 - Look on line 5 of the I-20 for the updated date and type into “Last say in U.S. in this status” on Tax Navigator. Click ok to save.
 - Log into PeopleSoft Production and search for name in “Job Data”
 - Once in “Job Data”, go to “UM Specific”

- Change the Work Authorization Date to the date on line 5 of the I-20
(this is the same date that was updated for Tax Navigator)
- Click Save

Updating Work Authorization in Tax Navigator

PACKETS INCLUDE:

- I-9 forms for
- I-20 for F-1 Form & DS-2019 for J-1
- I 797 for H1P but could be used for F-1 and J-1
- Employment Authorization Document
 - Emma must be signed in International Tax Navigator under “Recipient Setup and Processing”
- Click “recipients”
- To search click the binoculars and enter name or Organization Employee I.D. #
- Once you pull up the individual name, click on the immigration detail tab
 - If status is same on both the Immigration details and on the DS-2019 or the I-9 :
Continue
 - If not set it aside and return the I-9 form to Emma
- To change the expiration date: Click the Change tab
 - Change the Expiration date to the most current date on the I-20, DS-2019 or I-797
 - Ok
 - Substantial Practice Test
 - Close
 - Treaty Analysis
 - Close
- Reprint
 - Have Image Now open
 - Recipient Analysis Summary
 - Print on Image Now Printer
 - Always use the profile
 - Ok
 - Close

- Treaty Analysis Log
 - Print on Image Now
 - Close
 - Residency Analysis Log
 - Print on Image Now
 - Close
 - Substantial Presences Test Report
 - Print on Image Now
 - Close
- ❖ When completed put an star and Initial your name and write an I for Printing into Image Now
- Once you are done with all the I-9 Forms, link the reports in the following order:
 1. Substantial Presence Test Report
 2. Residency Analysis Log
 3. Treaty Analysis Log
 4. Recipient Analysis Summary