

GUIDE TO BANNER & OTHER HUMAN RESOURCES & PAYROLL FORMS



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**By Task (What Form Do I Use To...)
Adjustment Processing**

What form do I use to...	System/ Form Title/ Name	Reference Material
Confirm that an employee's job or record was created properly?	HR Front End: Employee Record View Banner: Employee Summary View Form (NZIESUM)	
Review the payroll calculation schedule?	University Payroll Schedule http://www.obfs.uillinois.edu/payroll/schedules/	
Submit a request to Payroll to correct time entry errors when a timesheet has been approved but before the final payroll calculation?	Adjustment Notification Application (ANA): https://apps.obfs.uillinois.edu/ANA/index.cfm Select Pay Event Adjustment .	ANA Training Guide Section: Adjustment Types
Submit a request to Payroll to process an adjustment for an overpayment and/or to send an overpayment letter?	Adjustment Notification Application (ANA): https://apps.obfs.uillinois.edu/ANA/index.cfm Select Pay Event Adjustment .	ANA Training Guide Section: Adjustment Types
Review an adjustment notification and approve it, reject it, or return it for correction?	Adjustment Notification Application (ANA): https://apps.obfs.uillinois.edu/ANA/index.cfm Look for Dept Approval in the Activity column.	ANA Training Guide Section: Adjustment Types
Edit or delete a returned adjustment notification?	Adjustment Notification Application (ANA): https://apps.obfs.uillinois.edu/ANA/index.cfm Look for Correction in the Activity column.	ANA Training Guide Section: Items Returned for Rework
Determine the disposition of a timesheet?	Banner: Pay Event List Form (PZILIST)	HRPPR 120: Adjustment Processing for Units training guide Lesson 3.1

Guide to Banner & Other Human Resources & Payroll Forms

What form do I use to...	System/ Form Title/ Name	Reference Material
Make a positive post-payroll adjustment when an employee was underpaid during a previous pay period?	Banner: Adjustment Processing Form (PZAADJT) Workflow	HRPPR 120: Adjustment Processing for Units training guide Lesson 5.2
Submit an adjustment to the Department Approver's Worklist?	Banner: Adjustment Processing Form (PZAADJT) Workflow	HRPPR 120: Adjustment Processing for Units training guide Lesson 5.3
Review adjustments in my Department Approver Worklist and assign and route them to Payroll?	Banner: Adjustment Processing Form (PZAADJT) Workflow	HRPPR 120: Adjustment Processing for Units training guide Lesson 5.4
Erase a rejected adjustment?	Banner: Adjustment Processing Form (PZAADJT)	Erasing an Adjustment (PZAADJT) job aid
Correct an adjustment returned for correction?	Banner: Adjustment Processing Form (PZAADJT) Workflow	HRPPR 120: Adjustment Processing for Units training guide Lesson 3.5
Check the status of an adjustment in Workflow ?	Workflow: Status Search	Workflow Adjustment Status Search job aid
Check the status of an adjustment in Banner ?	Banner: Adjustment Processing Form (PZAADJT) or Pay Event List Form (PZILIST)	Reviewing Status of an Adjustment (PZAADJT) job aid

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Labor Redistribution

What form do I use to...	System/Form Title/Name	Reference Material
Perform a redistribution of earnings for a single pay event or for multiple pay events?	Banner: Labor Redistribution Form (PZAREDS)	Performing Labor Redistributions job aid

Guide to Banner & Other Human Resources & Payroll Forms

What form do I use to...	System/Form Title/Name	Reference Material
Perform a permanent change to a labor distribution?	HR Front End: Labor DISTRIBUTIONS	LD Changes: Can be done through the Employee Job Record Change or LD transaction type in HR Front End .

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Leave Information

What form do I use to...	System/Form Title/Name	Reference Materials
Enter non-FMLA or non-Sabbatical leave dates?	Banner: Employee Leave of Absence Form (PZAELOA)	Banner/HR System Job Aids web site
Submit leave request and approvals to Central HR?	UIC: HR Front End Employee Job Record Change transaction UIS: Personnel Information Transmittal Report (PITR) UIUC: Leave Request e-mail	Banner/HR System Job Aids web site Section: Campus Processing
Submit sabbatical leave information to Central HR?	UIC: HR Front End Employee Job Record Change transaction UIS: Personnel Information Transmittal Report (PITR) UIUC: Board of Trustees (BOT) approval list (<i>received from the BOT</i>)	Banner/HR System Job Aids web site Section: Campus Processing
Update AP leave balances if transferring positions?	Banner: Employee Leave Balances Form (PEALEAV)	Banner/HR System Job Aids web site
Update Academic shared benefits balances? (UIC, UIS only)	Banner: Employee Leave Balances Form (PEALEAV) NOTE: This is only for UIC, UIS.	Banner/HR System Job Aids web site Section: Campus Processing
Report Civil Service vacation or sick leave time?	Banner: Electronic Approvals of Time Entry Form (PHATIME)	Banner/HR System Job Aids web site

Guide to Banner & Other Human Resources & Payroll Forms

What form do I use to...	System/Form Title/Name	Reference Materials
Enter or view non-FMLA or non-Sabbatical leave dates?	Banner: Employee Leave Balances Form (PEALEAV) or Employee Leave History Form (PEILHIS)	Banner/HR System Job Aids web site

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Family Medical Leave (FMLA) Information: *Banner*

What form do I use to...	System/Form Title/Name	Reference Materials
View FMLA Status?	Banner: Employee FMLA Status Inquiry Form (PEIFMLA)	Banner/HR System Job Aids web site
Enter or view FMLA eligibility dates (Year Begin and End Dates)?	Banner: Employee FMLA Information Form (PEAFMLA)	Banner PEAFMLA Instructions job aid
Enter FMLA leave request dates?	Banner: Employee FMLA Information Form (PEAFMLA)	Banner PEAFMLA Instructions job aid
Enter or view the status of an FMLA leave request?	Banner: Employee FMLA Information Form (PEAFMLA)	Banner PEAFMLA Instructions job aid
Enter or view partial paid or unpaid FMLA leave of absence dates?	Banner: Employee Leave of Absence Form (PZAELOA)	Banner/HR System Job Aids web site

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Departmental Time Entry for Bi-Weekly Employees: *Banner*

What form do I use to...	System/Form Title/Name	Reference Materials
Extract timesheets?	Banner: Electronic Approvals of Time Entry Form (PHATIME)	Extracting Timesheets job aid
Enter and submit time for non-exempt, exempt, and positive time employees?	Banner: Electronic Approvals of Time Entry Form (PHATIME)	Payroll & Earnings Training Materials job aids

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What form do I use to...	System/Form Title/Name	Reference Materials
Restart an employee's timesheet?	Banner: Electronic Approvals of Time Entry Form (PHATIME)	Restarting an Employee's Timesheet job aid
Explain to payroll where there is no earnings code available to apply time against?	Banner: Electronic Approvals of Time Entry Form (PHATIME) NOTE: Use the Comments block.	Payroll & Earnings Training Materials job aids
Review leave balances?	Banner: Employee Leave Balance Form (PEALEAV)	Banner/HR System Job Aids web site
Correct and re-submit returned timesheets?	Banner: Electronic Approvals of Time Entry Form (PHATIME)	Payroll & Earnings Training Materials job aids
Create a proxy for a Department Originator?	Banner: Electronic Approval Proxy Rules Form (NTRPROX)	Creating a Proxy for Time Entry Role (NTRPROX) job aid
Assign or change the Superuser for a timesheet org?	Banner: Routing Queue Rules Form (NTRRQUE)	Working with Routing Queues in Banner job aid

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By Form/Action (What Can I Do With This Form or Action?) Adjustment Processing

Adjustment Notification Application (ANA)

Action	What Can I Do With This?
Select Pay Event Adjustment	Submit a request to Payroll to correct time entry errors when a timesheet has been approved but before the final payroll calculation.
	Submit a request to Payroll to process an adjustment for an overpayment, and/or to send an overpayment letter.
Dept Approval in the Activity column	Review an adjustment notification and approve it, reject it, or return it for correction.
Correction in the Activity column	Edit or delete a returned adjustment notification.

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Banner

Form Name	Form Title	What Can I Do With This?
Adjustment Processing Form	PZAADJT	Make a positive post-payroll adjustment when an employee was underpaid during a previous pay period.
		Submit an adjustment to the Department Approver's Worklist.
		Review adjustments in your Department Approver Worklist and assign and route them to Payroll.
		Erase a rejected adjustment.
		Correct an adjustment returned for correction.
		Check the status of an adjustment in Banner .
Pay Event List Form	PZILIST	Determine the disposition of a timesheet.
		Check the status of an adjustment in Banner .

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Workflow

Transaction	What Can I Do With This?
Status Search	Check the status of an adjustment in Workflow .

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University Payroll Schedule

URL	What Can I Do With This?
http://www.obfs.uillinois.edu/payroll/schedules/	Review the payroll calculation schedule.

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Labor Redistribution

Banner

Form Name	Form Title	What Can I Do With This?
Labor Redistribution Form	PZAREDS	Perform a redistribution of earnings for a single pay event or multiple pay events.

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Leave

Banner

Form Name	Form Title	What Can I Do With This?
Employee FMLA Information Form	PEAFMLA	Enter FMLA eligibility dates (Year Begin and End Dates).
		View FMLA eligibility dates (Year Begin and End Dates).
		Enter FMLA leave request dates.
		Enter an FMLA leave request.
		View the status of an FMLA leave request.

Guide to Banner & Other Human Resources & Payroll Forms

Form Name	Form Title	What Can I Do With This?
Employee Leave Balances Form	PEALEAV	Update AP leave balances if an employee is transferring positions.
		Update Academic shared benefits balances. NOTE: Only UIC, UIS use this form.
		Enter non-FMLA or non-Sabbatical leave dates.
		View non-FMLA or non-Sabbatical leave dates.
Employee FMLA Status Inquiry Form	PEIFMLA	View an employee's FMLA status.
Employee Leave History Form	PEILHIS	Enter non-FMLA or non-Sabbatical leave dates.
		View non-FMLA or non-Sabbatical leave dates.
Electronic Approvals of Time Entry Form	PHATIME	Report a Civil Service employee's vacation or sick leave time.
Employee Leave of Absence Form	PZAELOA	Enter non-FMLA or non-Sabbatical leave dates.
		Enter partial paid or unpaid FMLA leave of absence dates.
		View partial paid or unpaid FMLA leave of absence dates.

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E-mail/Lists

Name	What Can I Do With This?
Leave Request e-mail	Submit leave requests and approvals (including FMLA) to Central HR. NOTE: Only for UIUC.
Board of Trustees Approval List	Submit sabbatical leave information to Central HR. This is received from the Board of Trustees (BOT). NOTE: Only for UIUC.

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Departmental Time Entry for Bi-Weekly Employees

Banner

Form Name	Form Title	What Can I Do With This?
Employee Leave Balance Form	PEALEAV	Review an employee's leave balance.
Electronic Approvals of Time Entry Form	PHATIME	Extract timesheets.
		Enter time for non-exempt, exempt, and positive time employees.
		Submit time for non-exempt, exempt, and positive time employees.
		Restart an employee's timesheet.
		Correct and re-submit returned timesheets.
Electronic Approval Proxy Rules Form	NTRPROX	Create a proxy for a Department Originator.
Routing Queue Rules Form	NTRRQUE	Assign the Superuser for a timesheet organization.
		Change the Superuser for a timesheet organization.

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Human Resources Information – HR Front End

The Human Resources Front End (HRFE) is an interface to **Banner** that is used by HR, Payroll, and Benefits for viewing employee information and processing HR transactions.

Different levels of security are needed to access the system, view employee information, or process transactions in the HR Front End. If you are not sure where to go in the HR Front End to view information or process transactions, contact your appropriate campus HR office for assistance:

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5990>

Once the appropriate level of security has been given, users can access the HR Front End at:

<https://hr.apps.uillinois.edu/hrFrontEnd/>

HR Front End – Finding an Employee

Where in HR Front End	What Can I Do With This?
Employee Search	Search for an active or terminated employee based on any of the following search criteria: UIN Name User ID SSN Home Chart, College, Department, or Organization information Campus Employee Group

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HR Front End – View Employee and Person Information

Employee Record View (ERV): Gives a “summary” view of person information, job data, and position data in one place.

Where in HR Front End	What Can I Do With This?
Employee Record View – Employee General Information tab	View employee information such as: UIN, Name, Home Chart/Org, Check Distribution Code, Hire Date, Citizenship, and some Visa information.
Employee Record View – Bio/Demo tab	View employee bio/demo information such as: SSN, birthday, age, race, gender, ethnicity, and marital status. NOTE: Additional security is required to view SSN.

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Where in HR Front End	What Can I Do With This?
	View Address information (including email address).
	View Emergency Contact information.
	View Education information.
	View Work Experience.
	View Licenses and Certifications.
	View Driver's License.
	View Languages.

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HR Front End – View Job Information

Where in HR Front End	What Can I Do With This?
Employee Record View – Jobs tab NOTE: Some information will not display for certain employees. For example, Faculty Rank and Tenure information will only be available for Faculty employees.	View Job Detail information.
	View Job Labor Distributions.
	View Position Information.
	View Work Schedules.
	View Service Dates and Contract Parameters.
	View Default Earnings.
	View Faculty Rank and Tenure.

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HR Front End – Transaction Processing

HR Front End Transaction	What Can I Do With This?	Reference Materials
Transaction History	View past/applied transactions for an employee.	HR Front End Training
New Hire	Must be completed when an employee is new to the University or has completely separated and is returning to the University (re-hire).	HR Front End Training
	Perform a search of Banner and iCard for the new hire.	UIC Human Resources Systems Support
	Create a New Hire Logon.	HR Front End Transaction Tips
	Search for an existing position to use, or create a new one. NOTE: New positions may only be created for certain employee groups. Additional security is required to create new positions.	
	Confirm/update job information.	
Add a Job	Add a job for an active employee.	HR Front End Training UIC Human Resources Systems Support HR Front End Transaction Tips
Employee Job Record Changes	Make changes to Job Detail information. Types of changes include, but are not limited to: FTE Change Salary Change Labor Distribution Changes Work Schedule Changes	HR Front End Training UIC Human Resources Systems Support HR Front End Transaction Tips

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HR Front End Transaction	What Can I Do With This?	Reference Materials
Labor Distribution Only Changes	Make a change ONLY to the JOB Labor Distribution.	HR Front End Training UIC Human Resources Systems Support HR Front End Transaction Tips
Employee Data Changes	Make a change to employee information such as name, SSN, or Home Org.	HR Front End Training UIC Human Resources Systems Support HR Front End Transaction Tips
Job End Date	Add an end date to a job, change an existing job end date, or remove a job end date.	HR Front End Training UIC Human Resources Systems Support HR Front End Transaction Tips
Reappointment	Extend a job that has a job end date, or reactivate a terminated job that the employee once held.	HR Front End Training UIC Human Resources Systems Support HR Front End Transaction Tips

Guide to Banner & Other Human Resources & Payroll Forms

HR Front End Transaction	What Can I Do With This?	Reference Materials
Position Creation and Maintenance	<p>Maintain/edit position data, or create a new position.</p> <p>NOTE: New positions may only be created for certain employee groups. Additional security is required to create new positions.</p>	<p>HR Front End Training</p> <p>UIC Human Resources Systems Support</p> <p>HR Front End Transaction Tips</p>
Separation	<p>Should be completed when an employee is leaving the University. This transaction will end all jobs and remove the employee from Payroll.</p> <p>NOTE: Leave balances should be updated in Banner prior to starting a Separations transaction in the HR Front End.</p> <p>NOTE: Separation payouts are processed through Banner.</p> <p>See Separation: Non-Student Employees below for Banner forms relating to Separation.</p>	<p>HR Front End Training</p> <p>UIC Human Resources Systems Support</p> <p>HR Front End Transaction Tips</p>

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Separation: Non-Student Employees

NOTE: The Academic/Faculty employee category includes Academic Professionals (AP), Faculty, Clinical and Research Faculty, Visiting Faculty, Lecturers, and Post-doctoral Research Associates. The Other employee category includes Academic Hourly, Graduate Hourly, Graduate Assistants, Academic Unpaid, and Extra Help Non-Clerical employees.

Banner

Form Name	Form Title	What Can I Do With This?
Employee Leave Balance Form	PEALEAV	Log the amount of leave used since the last reporting period for Civil Service and Academic/Faculty employees.
		UIS: Log the amount of leave that an employee in the category of Other has used since the last reporting period. NOTE: UIC, UIUC do not use this form to log the amount of leave for Other employees.
Adjustment Processing Form	PZAADJT	Process vacation and sick leave payout for the Payroll Office for Civil Service and Academic/Faculty employees.
		UIS: Process vacation and sick leave payout for the Payroll Office for an employee in the category of Other. NOTE: UIC, UIUC do not use this form to log the amount of leave for Other employees.

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AIMS Security

NOTE: Contact [AIMS Security](#) if you need to remove a terminated Civil Service or Academic/Faculty employee from the routing queue to approve time and attendance.