

# 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?	<b>HR Front End:</b> Employee Record View <b>Banner:</b> Employee Summary View Form (NZIESUM)	
Review the payroll calculation schedule?	University Payroll Schedule <a href="http://www.obfs.uillinois.edu/payroll/schedules/">http://www.obfs.uillinois.edu/payroll/schedules/</a>	
Submit a request to Payroll to correct time entry errors when a timesheet has been approved but before the final payroll calculation?	<b>Adjustment Notification Application (ANA):</b> <a href="https://ana.uillinois.edu">https://ana.uillinois.edu</a> Select <b>Pay Event Adjustment</b> .	<a href="#">ANA Training Guide</a> <b>Section:</b> Adjustment Types
Submit a request to Payroll to process an adjustment for an overpayment and/or to send an overpayment letter?	<b>Adjustment Notification Application (ANA):</b> <a href="https://ana.uillinois.edu">https://ana.uillinois.edu</a> Select <b>Pay Event Adjustment</b> .	<a href="#">ANA Training Guide</a> <b>Section:</b> Adjustment Types
Review an adjustment notification and approve it, reject it, or return it for correction?	<b>Adjustment Notification Application (ANA):</b> <a href="https://ana.uillinois.edu">https://ana.uillinois.edu</a> Look for <b>Dept Approval</b> in the <b>Activity</b> column.	<a href="#">ANA Training Guide</a> <b>Section:</b> Adjustment Types
Edit or delete a returned adjustment notification?	<b>Adjustment Notification Application (ANA):</b> <a href="https://ana.uillinois.edu">https://ana.uillinois.edu</a> Look for <b>Correction</b> in the <b>Activity</b> column.	<a href="#">ANA Training Guide</a> <b>Section:</b> Items Returned for Rework
Determine the disposition of a timesheet?	<b>Banner:</b> Pay Event List Form (PZILIST)	<a href="#">HRPPR 120: Adjustment Processing for Units</a> training guide <b>Lesson 3.1</b>

**Guide to Banner & Other Human Resources & Payroll Forms**

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

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**Labor Redistribution**

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

**Guide to Banner & Other Human Resources & Payroll Forms**

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

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**Leave Information**

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

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

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**Family Medical Leave (FMLA) Information: *Banner***

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

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

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

**Guide to Banner & Other Human Resources & Payroll Forms**

<b>What form do I use to...</b>	<b>System/Form Title/Name</b>	<b>Reference Materials</b>
Restart an employee's timesheet?	<b>Banner:</b> Electronic Approvals of Time Entry Form (PHATIME)	<a href="#">Restarting an Employee's Timesheet</a> job aid
Explain to payroll where there is no earnings code available to apply time against?	<b>Banner:</b> Electronic Approvals of Time Entry Form (PHATIME) <b>NOTE:</b> Use the Comments block.	<a href="#">Payroll &amp; Earnings Training Materials</a> job aids
Review leave balances?	<b>Banner:</b> Employee Leave Balance Form (PEALEAV)	<a href="#">Banner/HR System Job Aids web site</a>
Correct and re-submit returned timesheets?	<b>Banner:</b> Electronic Approvals of Time Entry Form (PHATIME)	<a href="#">Payroll &amp; Earnings Training Materials</a> job aids
Create a proxy for a Department Originator?	<b>Banner:</b> Electronic Approval Proxy Rules Form (NTRPROX)	<a href="#">Creating a Proxy for Time Entry Role (NTRPROX)</a> job aid
Assign or change the Superuser for a timesheet org?	<b>Banner:</b> Routing Queue Rules Form (NTRRQUE)	<a href="#">Working with Routing Queues in Banner</a> 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 <b>Pay Event Adjustment</b>	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.
<b>Dept Approval</b> in the <b>Activity</b> column	Review an adjustment notification and approve it, reject it, or return it for correction.
<b>Correction</b> in the <b>Activity</b> 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 <b>Banner</b> .
Pay Event List Form	PZILIST	Determine the disposition of a timesheet.
		Check the status of an adjustment in <b>Banner</b> .

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**Workflow**

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

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**University Payroll Schedule**

URL	What Can I Do With This?
<a href="http://www.obfs.uillinois.edu/payroll/schedules/">http://www.obfs.uillinois.edu/payroll/schedules/</a>	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.

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<b>Form Name</b>	<b>Form Title</b>	<b>What Can I Do With This?</b>
Employee Leave Balances Form	PEALEAV	Update AP leave balances if an employee is transferring positions.
		Update Academic shared benefits balances. <b>NOTE:</b> 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. <b>NOTE:</b> Only for UIUC.
Board of Trustees Approval List	Submit sabbatical leave information to Central HR. This is received from the Board of Trustees (BOT). <b>NOTE:</b> 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	<p>Search for an active or terminated employee based on any of the following search criteria:</p> <ul style="list-style-type: none"> <li>UIN</li> <li>Name</li> <li>User ID</li> <li>SSN</li> <li>Home Chart, College, Department, or Organization information</li> <li>Campus</li> <li>Employee Group</li> </ul>

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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	<p>View employee information such as:</p> <p>UIN, Name, Home Chart/Org, Check Distribution Code, Hire Date, Citizenship, and some Visa information.</p>
Employee Record View – Bio/Demo tab	<p>View employee bio/demo information such as: SSN, birthday, age, race, gender, ethnicity, and marital status.</p> <p><b>NOTE:</b> Additional security is required to view SSN.</p>

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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  <b>NOTE:</b> 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.	<a href="#">HR Front End Training</a>
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).	<a href="#">HR Front End Training</a>
	Perform a search of <b>Banner</b> and iCard for the new hire.	<a href="#">UIC Human Resources Systems Support</a>
	Create a New Hire Logon.	<a href="#">HR Front End Transaction Tips</a>
	Search for an existing position to use, or create a new one. <b>NOTE:</b> 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.	<a href="#">HR Front End Training</a>  <a href="#">UIC Human Resources Systems Support</a>  <a href="#">HR Front End Transaction Tips</a>
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	<a href="#">HR Front End Training</a>  <a href="#">UIC Human Resources Systems Support</a>  <a href="#">HR Front End Transaction Tips</a>

**Guide to Banner & Other Human Resources & Payroll Forms**

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.	<a href="#">HR Front End Training</a>  <a href="#">UIC Human Resources Systems Support</a>  <a href="#">HR Front End Transaction Tips</a>
Employee Data Changes	Make a change to employee information such as name, SSN, or Home Org.	<a href="#">HR Front End Training</a>  <a href="#">UIC Human Resources Systems Support</a>  <a href="#">HR Front End Transaction Tips</a>
Job End Date	Add an end date to a job, change an existing job end date, or remove a job end date.	<a href="#">HR Front End Training</a>  <a href="#">UIC Human Resources Systems Support</a>  <a href="#">HR Front End Transaction Tips</a>
Reappointment	Extend a job that has a job end date, or reactivate a terminated job that the employee once held.	<a href="#">HR Front End Training</a>  <a href="#">UIC Human Resources Systems Support</a>  <a href="#">HR Front End Transaction Tips</a>

**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><b>NOTE:</b> New positions may only be created for certain employee groups. Additional security is required to create new positions.</p>	<p><a href="#">HR Front End Training</a></p> <p><a href="#">UIC Human Resources Systems Support</a></p> <p><a href="#">HR Front End Transaction Tips</a></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><b>NOTE:</b> Leave balances should be updated in <b>Banner</b> prior to starting a Separations transaction in the HR Front End.</p> <p><b>NOTE:</b> Separation payouts are processed through <b>Banner</b>.</p> <p>See Separation: Non-Student Employees below for <b>Banner</b> forms relating to Separation.</p>	<p><a href="#">HR Front End Training</a></p> <p><a href="#">UIC Human Resources Systems Support</a></p> <p><a href="#">HR Front End Transaction Tips</a></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.  <b>NOTE:</b> UIC, UIUC do <b>not</b> 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.  <b>NOTE:</b> UIC, UIUC do <b>not</b> 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.