OnBase Instruction Guide – Reappoint, OPS Semester Break, GA Leave of Absence, Terminate & Rehire

- 1. Log onto OnBase Web Version at docs.erp.ufl.edu
- 2. Select the **Document Retrieval** icon, in the top left corner.



3. Next, click Open Workflow – a new window will open.



4. Under Life Cycle View, click the arrow next to ECE Faculty LC. Then select Current Employees folder.

OnBase 🗘 🗘 🖬 🛏	Inbox		
.e Ф Т	Drag a column header here to group by that column.	REQUESTED ACTION	POSITION TYPE
LIFE CYCLE VIEW WORK FOLDER	□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	♥ Contains	♥ Contains
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ECE Faculty LC	CUMMINGS	REAPPOINT	RA
Supervisor Review	CUMMINGS	NEW HIRE	RA
Current Employees	CUMMINGS	NEW HIRE	RA
Past Employees	CUMMINGS	NEW HIRE	TA
> a ECE LOA LC	DELHOMME	NEW HIRE	OPS
> 🗞 ECE Payroll LC	DELHOMME	NEW HIRE	RA

5. Filter by, ECE Supervisor Last Name, Proxy Last Name, Student Name etc. to search your student group

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6. To <u>**REAPPOINT**</u>, first (1) select the employee name. After selecting employee name, their previous appointment form will appear underneath. Second (2), click the Reappoint button. *NOTE: the Department Associate Chair will submit Teaching Assistant and OPS grader appointments (an email will be generated once a form has been submitted).*

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Supervisor Review	ARNOLD		RA	JAITIVANEOIT	CRASTO
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Current Employees Past Employees	ARNOLD		OPS	TRINIDAD	GRINSPAN FERRAR
ECE Grants LC	ARNOLD		RA	BRENDEN	MEARS
ECE LOA LC	ARNOLD		OPS	MATTHEW	STORMANT
ECE Payroll LC	ASADI ZANJANI		OPS	THAMID	AHMED
EEP Application Approval	Items: 392	CALLANIA	D.4		AT 1140AM
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Student Employme	nt				
tion Type *	-2	Employment Se	mester *		Year*

A new form will appear in the Inbox Field. Edit fields in the new form as applicable. (*NOTE: DO NOT make any changes to the previous appointment form in the bottom window.*) Scroll to the bottom of the top new form (making any updates) and click Submit. This will save and send the document to the Payroll & Personnel Office for review.

OnBase 🗘 🗘	Inbox User Interaction
LIFE CYCLE VIEW WORK FOLDER	Electrical and Computer Engineering Student Employment
No items to display	Applicant Number Position Type* Employment Semester* Requested Action* 225 RA V SPRING V Start Date End Date 01/01/2019 05/15/2019
	Please enter your UFID and hit tab to populate remaining fields. Supervisor Check here if you filling this out for a supervisor. UFID * Last Name First Name Email 07586351 CRICHTON TRACY TCRICHTON#UFLEDU
Items: 0 Template: None	Discard and Continue Discard and Cancel
Electrical and Comp Student Employment	uter Engineering
Applicant Number	DO NOT MAKE ANY CHANGES TO THIS FORM
ease enter your UFID and hit	tab to populate remaining fields.

7. To initiate an **OPS SEMESTER BREAK**, first (1) select the OPS employee name. Second (2) click the OPS Semester Break button. (Note: if you select an employee who is NOT categorized as an OPS Position Type, you will get an error. Hit OK and make another selection.)

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Supervisor Review	ARNOLD		RA		CRASTO
Upcoming Employees Current Employees	ARNOLD		OPS	TRE	FREE
Past Employees	ARNOLD		OPS	TRINIDAD	GRINSPAN FERRAR
ECE Grants LC	ARNOLD		RA	BRENDEN	MEARS
ECE LOA LC	ARNOLD		OPS	MATTHEW	STORMANT
ECE Payroll LC	ASADI ZANJANI		OPS	THAMID	AHMED
EEP Application Approval	Items: 392	CALLANIA	D 4		
HRS - Remote Work Location Approval UFIT Alternative Schedule	Reappoint Reappoint	PS emester GA Leave of Absence	Terminate 🍎 New Hire		
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	2	Employment Co	martart		Year*

A new form will appear in the Inbox Field. Edit fields in the new form as applicable. *(NOTE: DO NOT make any changes to the previous appointment form in the bottom window.)* Scroll to the bottom of the top new form (making any updates), enter a thorough explanation of the OPS employee's semester break (including start and end dates), and click Submit. This will save and send the document to the Payroll & Personnel Office for review.



8. To initiate a <u>GA LEAVE OF ABSENCE</u>, first (1) select the GA (RA or TA) employee name. Second (2) click the GA Leave of Absence button. (Note: if you select an employee who is NOT categorized as an RA or TA Position Type, you will get an error. Hit OK and make another selection.)

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	2	Employment Se	mester		Vear*
		Employment Se	mester*		Year*

A new form will appear in the **Inbox Field**. Edit fields in the new form as applicable. (*NOTE: DO NOT make any changes to the previous appointment form in the bottom window.*) Scroll to the bottom of the top new form (making any updates), enter a thorough explanation of the GA's employee's Leave of Absence, and click Submit. This will save and send the document to the Payroll & Personnel Office for review.



9. To <u>TERMINATE</u>, first (1) select the employee name. Second (2), click the Terminate button. Enter a reason for the termination (i.e. graduation, internship, poor performance etc...). When reason is entered, click Submit. This will save and send the document to the Payroll & Personnel Office for review.

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ition Type * Employment Semester * Year *				CODINIC			2022

- 10. Repeat steps five through nine to submit all forms under your group to the Payroll & Personnel Office.
- 11. To <u>REHIRE</u>, first select the **Past Employees** folder under Life Cycle View. Filter by, **ECE Supervisor Last Name, Proxy Last Name, Student Name** etc. to search your student group. Then select employee name, their previous appointment form will appear below. Click the Rehire button.

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•: •	•	ECE - SUPERVISOR LAST NA	PROXY LAST NAME	REQUESTED ACTION	POSITION TYPE	STUDENT FIRST NAME	LAST NAME
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Shadowing Program WF		DELHOMME		NEW HIRE	OPS	TEST 2	TEST 2
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Supervisor Review		4					
Current Employees	•	Items: 4 of 10 Rehire Create Evaluation	New Hire				
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12. A new form will appear in the **Inbox Field**. Edit fields in the new form as applicable. (*NOTE: DO NOT make any changes to the previous appointment form.*) Scroll to the bottom of the new form and click **Submit**. This will save and send the document to the Payroll & Personnel Office for review.

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Reminders:

- You will only be able to submit a reappoint or terminate form once (an email will be generated once a form has been submitted).
- The Department Associate Chair will submit Graduate Teaching Assistant and Undergraduate OPS grader appointments (an email will be generated once a form has been submitted).
- When reappointing students, you only have the option to Submit or Cancel/Discard. The Discard/Continue button has been deactivated.
- 4 You should only reappoint or terminate students assigned to you excluding TA's and OPS graders.
- **4** Review your forms and respond promptly.