

# Automated Referral Creation

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## Overview

The purpose of this document is to provide an AIS end user with instructions on using the automated referral creation. The automated referral creation module allows for the creation of a student employee referral by the hiring department. After a referral is submitted by the department and approved by the Student Financial Services an employment contract and Electronic Timesheet will be created.

The automated referral modules are accessed through the Student Employment Announcement window. To begin the process, open the Student Employment Announcement window in AIS by clicking Human Resources and then clicking Student Empl Announcement. After the Student Employment Announcement displays (see Figure 1) enter the four digit academic year and position number for the referral you want to create or approve. You can now create a referral by clicking the create referral tool bar button . Access to these buttons is based on the user's access, so one, or none of these buttons may be present.

CSU-Pueblo Administrative Information System (AIS aisdev.aisdev/merritt)

Student Employment Job Announcement

Academic Year: [ ] Title: [ ]  
 Position No: [ ] Descr: [ ]  
 Position Status: PT [ ]  
 Emp Type: [ ] Work Study: [ ] Hourly: [ ]  
 Special Pay Type: [ ]  
 Avail Positions: Fall [0] Dept: [ ] FA: [ ] Spring [0] Dept: [ ] FA: [ ] Summer [0] Dept: [ ] FA: [ ]  
 Apprv By: [ ] Apprv By: [ ] Apprv By: [ ]

Announce on Web:  Position Start Date: [ ] End Date: [ ] Apply By: IN-PERSON

|                | Idno | First | Last | Reporting Dept |
|----------------|------|-------|------|----------------|
| Dean/Director: | PID  | [ ]   | [ ]  | [ ]            |
| Supervisor:    | PID  | [ ]   | [ ]  | [ ]            |
| Contact:       | PID  | [ ]   | [ ]  | [ ]            |
| Delegate:      | PID  | [ ]   | [ ]  | [ ]            |

Contact Phone: 719 [ ] Contact Location: [ ]  
 Contact Email: [ ]  
 Comments: [ ]

Approved by: Dept: [ ] FA: [ ]

< hrstanno >

Figure 1 - Student Announcement Window

## Referral Creation

Enter the Academic Year and Position Number, then click the create referral tool bar button, and the create referral window will display, which is show in Figure 2.

**Create Employment Referral**

Student Referrals

**Id:**  **Last:**  **First:**  **M:**

**Create Referral**

| Acad Year | Pos No | Job Title      | Department | Job Category | Wage Level  |
|-----------|--------|----------------|------------|--------------|-------------|
| 2010      | 1033   | OFFICE SUPPORT | AUX        | OFFICE       | 7.36 - 8.50 |

**Work Study / International**

**Cost Center:**  **UNIVERSITY CENTER - GENERAL** **Rate:**

| Term        | Create                   | Award                | Start Date | End Date |
|-------------|--------------------------|----------------------|------------|----------|
| Fall        | <input type="checkbox"/> | <input type="text"/> | 08/09/10   | 12/31/10 |
| Spring      | <input type="checkbox"/> | <input type="text"/> | 01/01/11   | 05/07/11 |
| Summer (PT) | <input type="checkbox"/> | <input type="text"/> | 05/08/11   | 08/07/11 |

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**Referral Status** **Dept:**  **Cost Center:**  **Show Denials**

**Pos No:**  **Job Title:**

| Idno | Name | Rate | Fall | Spring | Summer |
|------|------|------|------|--------|--------|
|      |      |      |      |        |        |

**Status: A - Approved (Contract Created) D - Denied (Contract Not Created), P - Pending Approval/Denial**

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Figure 2 - Automated Referral Window

The automated referral window contains three sections. The top section contains the ID and name of the individual who the referral is being created. The middle section is where the position information and terms are selected for referral creation. The lower section is the status of all referrals for this position.

### Creating a Referral

To create a referral, enter the individual(s) PID into the ID field in the top portion of the window. If you do not know the individual's PID you can enter the person's last and/or first name and click the search button. From within the search results window double click on the desired individual. Once an individual has been selected a validation check is done to ensure that the individual is eligible for Student Employment. If the individual is not eligible, a message will be displayed containing the reason for the ineligibility. An example of this type of message is show in Figure 3.

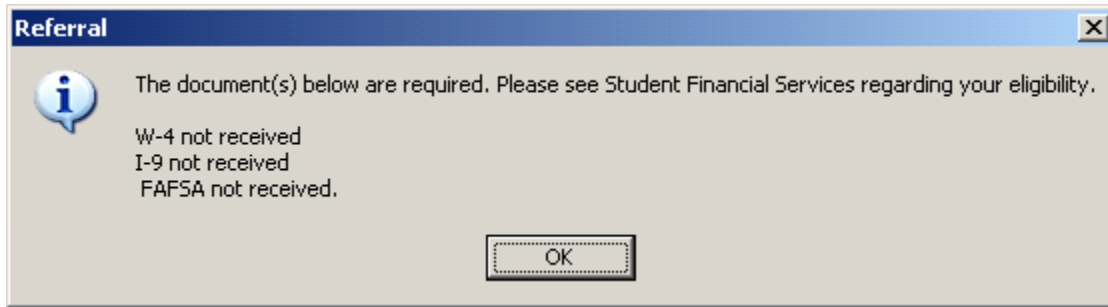


Figure 3 - Eligibility Message

If the individual is eligible, any existing referrals, or a blank referral will display. Existing referrals are identified by checked create check boxes. These same referrals are also listed in the lower portion of the window. Figure 4 shows an existing referral for Fall.

### Create Employment Referral

Student Referrals

**Id:** [ ] **Last:** [ ] **First:** [ ] **M:** [ ]

**Create Referral**

| Acad Year | Pos No | Job Title      | Department | Job Category | Wage Level  |
|-----------|--------|----------------|------------|--------------|-------------|
| 2010      | 1033   | OFFICE SUPPORT | AUX        | OFFICE       | 7.36 - 8.50 |

**Work Study / International**

**Cost Center:** 420-001 **Rate:** 7.50

| Term   | Create                              | Award    | Start Date | End Date |
|--------|-------------------------------------|----------|------------|----------|
| Fall   | <input checked="" type="checkbox"/> | 1,272.00 | 08/09/10   | 12/31/10 |
| Spring | <input type="checkbox"/>            | 1,070.00 | 01/01/11   | 05/07/11 |
| Summer | <input type="checkbox"/>            | NO AWARD | 05/08/11   | 08/07/11 |

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**Referral Status** **Dept:** AUX **Cost Center:** 420-001 **Show Denials**

**Pos No:** 1033 **Job Title:** OFFICE SUPPORT

| Idno | Name | Rate | Term   | Status |
|------|------|------|--------|--------|
|      |      |      | Fall   |        |
|      |      |      | Spring |        |
|      |      |      | Summer |        |

\$7.50 CO NEED 08/09/10 - 12/31/10 (P) CO NEED CO NEED

**Status: A - Approved (Contract Created) D - Denied (Contract Not Created), P - Pending Approval/Denial**

<hrstrefo>

Figure 4 - Existing Referral

To create a referral, simply check the check box of the desired term(s). If any errors exist they must be corrected before you will be allowed to perform any other action. Once the errors, if any, have been corrected you can save the information by clicking Print, New, Return (blue arrow button), or entering a new PID. Clicking the New button will allow you add multiple referrals. The only restriction for a new referral is that the term dates cannot overlap an existing referral.

Referrals can be entered if the NO AWARD text is displayed in the Award column. In these cases, Student Financial Services will need to load the award information before the contract can be activated. Please allow *24-48 hours* for this processing.

The lower portion of the window shows the status of existing referrals. The status can be P (Pending), A (Approved), or D (Denied). Pending means the referral does not yet have a corresponding contract and cannot be paid. Approved means the referral has a corresponding contract and can be paid. Denied means the referral was denied by Financial Aid and has no contract. Only referrals with a status of P or D for ALL terms can be deleted.