

## Setup Borrowed Employee - Requesting Institution

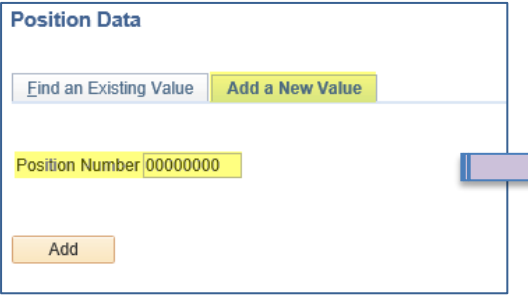
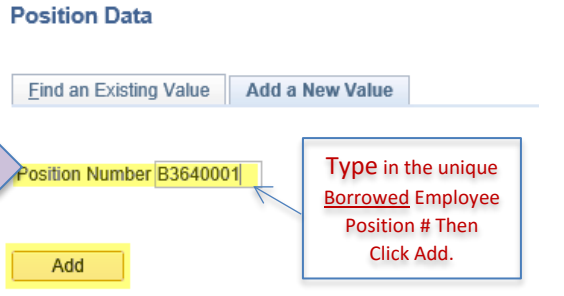

### INTRODUCTION

<b>Description</b>	This process describes the steps necessary to create a new Borrowed Employee Employment Instance at the Requesting Institution.
<b>Conditions</b>	<ul style="list-style-type: none"> <li>• A Position request has been approved and Budgeted.</li> <li>• The Requesting Department for the Position is 'Active' in the Department Table and is included in the Department Security Tree.</li> <li>• (If Faculty) Notify Faculty Affairs after Position has been created.</li> <li>• Obtain the following information: <ul style="list-style-type: none"> <li>○ Requesting Institution's two-digit Institution ID</li> <li>○ Appointment effective date</li> <li>○ HOME Position this Appointment will Report to</li> <li>○ Reg/Temp Status</li> <li>○ Full/Part Status</li> <li>○ Standard Hours</li> <li>○ FTE</li> <li>○ Pay Group</li> <li>○ Job Code</li> <li>○ Department</li> </ul> </li> </ul>
<b>Source Documents</b>	Borrowed Employee Agreement.
<b>Output Information</b>	Borrowed Employee Position and Employment Instance.



PROCEDURES	
SECTION 1	Create Requesting Institution Borrowed Employee Position
PATH	Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info > Add a New Value
Borrowed Employee Position Naming Convention	<p><b>BXXYY### = B3640001</b></p> <ul style="list-style-type: none"> <li>• <b>B</b> = Borrowed Employee Indicator</li> <li>• <b>XX</b> = <u>Your</u> two-digit Institution Number</li> <li>• <b>YY</b> = <u>Other</u> Institution's two-digit Institution Number</li> <li>• <b>###</b> = Sequential Number</li> </ul>
STEP 1.1 - Define	<p><b>Define Borrowed Employee Position Number</b></p> <ul style="list-style-type: none"> <li>• <b>B3640001</b> (Example)                             <ul style="list-style-type: none"> <li>○ <b>B</b> = Borrowed Employee Indicator</li> <li>○ <b>36</b> = <b>REQUESTING</b> – GA College &amp; State University (360)</li> <li>○ <b>40</b> = <b>HOME</b> GA Gwinnett College (400)</li> <li>○ <b>001</b> = 1<sup>st</sup> Sequential Number</li> </ul> </li> </ul>
STEP 1.2 - Search	<p><b>Search Position Data to Identify Next Sequence #</b></p> <ul style="list-style-type: none"> <li>• Search for the beginning characters of the proposed Position Number: (i.e. 'B3640')</li> </ul> <div data-bbox="574 1222 1344 1659" style="border: 1px solid black; padding: 5px;"> <p><b>Position Data</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p> <input type="button" value="▼ Search Criteria"/> </p> <p>                 Position Number <input type="text" value="begins with"/> <input type="text" value="B3640"/> </p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/> </p> <p>No matching values were found.</p> </div> <ul style="list-style-type: none"> <li>• If no match is found, begin the sequence at '001'</li> <li>• If a match is found, increment last sequence by '1'</li> </ul>



<b>STEP 1.3 - Add</b>	Add Borrowed Employee Position
	<ul style="list-style-type: none"> <li>The system will automatically populate the <b>Position Number</b> field with 00000000.</li> <li>Replace this number with the Borrowed Position number you defined in the Step-1 above.</li> <li>Complete Position Date Setup.</li> </ul>
	
<p><b>Update or Verify Fields –</b> (Description / Specific Information / Budget and Incumbents)</p>	
<ol style="list-style-type: none"> <li>Effective Date</li> <li>Reason</li> <li>Business Unit (default)</li> <li>Job Code (995)</li> <li>Reg/Temp (Temp)</li> <li>Full/Part</li> </ol>	<ol style="list-style-type: none"> <li>Official Title</li> <li>Reg Region (default)</li> <li>Department</li> <li>Company</li> <li>Location</li> <li>Reports To</li> </ol>
<ol style="list-style-type: none"> <li>Standard Hours = 0</li> <li>Work Period</li> <li>Max Head Count</li> <li>Budgeted Position (no)</li> <li>FTE = 0</li> <li>Adds to FTE Actual cnt = no</li> </ol>	
	Save Position Data Updates 
<b>STEP 1.4 - Update</b>	<b>Pay Group Information</b>
	Navigate to the Position Data - Job Information Tab Click on the ' <b>Paygroup Info</b> ' Link and update the following two fields:  <b>Effective Date:</b> (Set Equal to Position Effective Date) <b>Pay Group:</b> (Set = ' <b>XXN</b> ')  Click ' <b>Save</b> ' to save the Position Pay Group Update.
<b>STEP 1.5 - Action</b>	Navigate to the <b>Position Data Page</b> and <b>Save</b> the Position Record again.



SECTION II	Add New USG Affiliate Instance
<b>PATH</b>	Workforce Administration > Personal Information > Organizational Relationships > Add New USG Affiliate Instance
<b>STEP 2.1 – Add</b>	<b>New USG Affiliate Instance</b>
	<ul style="list-style-type: none"> <li>• Input the Employee Number</li> <li>• Verify that the Empl Record number updates correctly</li> <li>• Click 'Add Relationship'</li> </ul> <div style="border: 1px solid #00A0C0; padding: 10px; margin: 10px 0;"> <p style="text-align: center; color: #00A0C0;"><b>New USG Affiliate Instance</b></p> <p>Empl ID <input type="text" value="1000215"/> <input type="button" value="🔍"/></p> <p>Empl Record <input type="text" value="1"/></p> <p style="text-align: center;"><input type="button" value="Add Relationship"/></p> </div>
	<ul style="list-style-type: none"> <li>• Update Effective Date:</li> <li>• Action = Add USG Affiliate</li> <li>• Reason = Borrowed Employee</li> <li>• Job Indicator = Secondary</li> <li>• Input the Borrowed Employee Position Number Added in <b>SECTION 1 &gt; STEP 3</b></li> </ul> <div style="border: 1px solid #00A0C0; padding: 5px; margin: 10px 0;"> <p>Work Location   Job Information   Payroll   Salary Plan   Compensation</p> <p>Roll, Cinnamon (Cinnamon) <span style="float: right;">Empl ID 1000215</span></p> <p>USG Affiliate <span style="float: right;">Empl Record 1</span></p> <p>Work Location <input type="text"/> <span style="float: right;">Find First 1 of 1 Last</span></p> <p>*Effective Date <input type="text" value="06/01/2017"/> <input type="button" value="🔍"/></p> <p>Effective Sequence <input type="text" value="0"/> <span style="float: right;"><input type="button" value="Go To Row"/> <input type="button" value="+"/> <input type="button" value="-"/></span></p> <p>HR Status Active <span style="float: right;">*Action <input type="text" value="Add USG Affiliate"/></span></p> <p>Job Status Active <span style="float: right;">Reason <input type="text" value="Borrowed Employee"/></span></p> <p style="text-align: center;"><input type="button" value="Calculate Status and Dates"/></p> <p>Position Number <input type="text" value="B3640001"/> <input type="button" value="🔍"/> <span style="float: right;">Current <input type="button" value="📄"/></span></p> <p style="text-align: center;"><input type="button" value="Override Position Data"/></p> </div>
<b>STEP 2.2 – Update</b>	<b>Work Location Tab</b>
<b>STEP 2.3 – Update</b>	<b>Job Information Tab</b>
<b>STEP 2.4 - Update</b>	<b>Payroll Tab (XXN Pay Group)</b>
<b>STEP 2.5 – No Action</b>	<b>Compensation Tab (Zero Compensation)</b>
	Click ' <b>Save</b> ' to Save the Record

