

Affiliate User Guide

Revised

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Introduction

Affiliates are individuals who are associated with Virginia Commonwealth University (VCU) but who are not paid University employees. Proper identification of affiliates and maintenance of their information helps to provide a safe and secure campus environment for all employees, students, patients, and visitors, as well as access to certain privileges such as VCUCards and email.

This document details step-by-step instructions on how to complete three separate ePAFs related to affiliates: AFNEW - how to enter new affiliates into Banner, AFREN - how to renew a current affiliate's information, and AFTERM - how to terminate affiliates.

To ensure data accuracy in Banner, a Social Security Number (SSN) is strongly encouraged to avoid duplicate records. If the affiliate does not wish to provide a SSN, enter nine digits of all eights in the SSN field. For example, enter 888888888. An automated process will then create a temporary SSN for the individual.

Responsibility

Data input and maintenance is decentralized to the "owning" department (the department responsible for the individual's affiliation with VCU).

It is the responsibility of a department's Personnel Administrator (PA) to enter and maintain affiliate information and to terminate affiliations in a timely manner.

Access

Access to enter, renew, and terminate affiliates is limited to those with PA access in Banner. See <http://www.hr.vcu.edu/banner/security/> for instructions on how to obtain Banner access.

Reports

The report "Affiliates in Banner" is available in the Personnel Administrator folder in the Web Report Studio (WRS).

For Assistance

Email HR Operations at pafs@vcu.edu or call 827-1770.

Banner Affiliate Groups and Associated Privileges

Banner Affiliate Groups	VCU Card Type	Library Privileges	Affiliate Group Definitions
Contractors (CONT)	Contractor	None	Anyone employed by a vendor providing contractual services to VCU.
Friends of Library (FOL)	Affiliate	Limited (for use by VCU Libraries Only)	Donors who support the mission, programs, collections, and services of the VCU Libraries.
Emeriti Faculty (EMER)	Emeriti	Full*	A title awarded to some retired faculty members for distinguished or exceptional service and outstanding dedication to the University.
External Affiliate Faculty (EXAF)	Affiliate	Full*	Individuals not employed by VCU who contribute to the instruction of students in classroom or experiential settings, or make other significant contributions to the teaching and research missions of the University, its schools, and departments.
INOVA Campus (INOV)	Affiliate	Full*	Faculty not employed full-time at the University who participate in educational, research and/or clinical programs, and are affiliated with the Inova Health System (INOVA).
VAMC Faculty (VAMC)	Affiliate	Full*	Employees of the Hunter Holmes McGuire Veterans Affairs Medical Center (VAMC) who have been granted a “Full-Time Academic Appointment (VAMC)” with the University.
Affiliate (AFPR)	Affiliate	Full*	Affiliate with full privileges that do not fit into any of the other categories.
Affiliate – other (AFOT)	Affiliate	Limited**	Affiliate whose relationship with VCU supports commercial interests outside of the educational, teaching, patient care, or research purposes at VCU.

* Affiliate Library Privileges (EXAF, EMER, INOV, VAMC, AFPR)

Affiliate faculty and staff receive full library privileges, including borrowing, and off-campus access to databases and journals for scholarly, teaching, patient care, and research purposes at Virginia Commonwealth University. Use of remote databases for commercial purposes is prohibited and could result in the loss of database access for the entire University.

For Borrowing Privileges, the Affiliate will also need to complete a Borrower Registration Request at <http://www.library.vcu.edu/forms/pdf/AffilBorrow.pdf>.

For Interlibrary Loan and Document Delivery privileges, see <https://illiad.library.vcu.edu/illiad/>.

** Limited Library Privileges for Affiliate Other (AFOT)

Affiliates in this category do not receive off-campus access to library databases. Their relationship with the University is such that use of these databases is for commercial purposes and not for educational, teaching, patient care, or research purposes at VCU. Affiliates in this category can receive other library privileges, such as borrowing, if there is an agreement in place with VCU Libraries.

People Search on VCU Directory

When completing the ePAF for AFNEW, you will have the option to publish your affiliates in VCU's online directory, People Search. For affiliates you choose to publish in People Search, the only information that will appear is the affiliate's name, associated department and email address.

Note: Information on all affiliates who were loaded into Banner from MSS were loaded with the default of *not* publishing their information in People Search.




In the AFLOAD and AFNEW ePAFs:

- If the "Unlisted Telephone" field is checked "Y" for yes, the affiliate's information (name and associated department) will not be published in the People Search.
- If the "Unlisted Telephone" field is checked "N" for no, the affiliate's information (name and associated department) will be published in the People Search.

Set Up Your Routing Queues (NTRROUT- Affiliate)


Before completing any of the affiliate ePAFs, you must set up your routing queue(s) for each individual ePAF. You will only need to set these up one time, not every time you use the ePAF.

Instructions

1. Log in to Banner.
2. Key **NTRROUT** in the Go To box and press "**Enter**."
3. Your VCU eID displays in the User ID Field in the top left corner.
4. **Click** the drop-down arrow () next to Approval Category field:
 - a. Select the appropriate Approval Category.
 - i. You'll have to do this process separately for each of these approval categories:
 1. **AFNEW1 – Affiliate Identification**
 2. **AFNEW2 – Affiliation Information**
 3. **AFREN – Affiliate Renewal**
 4. **AFTERM – Affiliate Termination**
5. **Next Block**, () or **Ctrl/PgDn**).
6. You are now in the information block of this form.
7. For Level Code HROAPL, **Enter** the following:
 - a. **User ID: HREPAF.**
8. **Save** () or **F10**).
9. **Repeat the above process for each of the four listed approval categories above.**


Entering New Affiliates (AFNEW)

Instructions


1. Log into Banner with your username and password.
 2. If you haven't already done so, set up both of your routing queues; there are two separate routing queues for this particular ePAF. See instructions on page 5 (select the approval category AFNEW1 on your first routing queue and select AFNEW2 on the second).
 3. In the Go To... box, type **NEWAFFL** and hit **Enter**.
 4. Click the **Generate ID** icon. This action should enter the word **GENERATE** in the box next to ID.
 5. Click on the down arrow key next to the box that says **Matching Source**.
 6. Select the matching source that says **EXPRESS HIRE** from the box that pops up.
 7. **Next Block** (or **Ctrl/PgDn**).
 8. Complete the following fields. **You must completely fill out all of the following fields - do not fill out any additional fields or you will cause an error.**
 - Last name
 - First name
 - Address Type – select AF for Affiliate Address.
 - Address – enter Street Lines 1, 2, and 3 as needed; City; State; ZIP; for contractor affiliate types, use Address Line 1 for the Company Name.
 - SSN/SIN/TIN – **strongly encouraged**; do not use dashes; if unknown, enter nine digits of all eights in this field. **For example, enter 888888888.**
 - Birth Date – enter birth date day, birth date month, and birth date year.
 - Gender – select Male or Female from the drop-down.
 9. When finished, click **Duplicate Check Icon**. (This action will allow you to check to see if you are trying to create a record that already exists in Banner). Duplicate record?
 - If Yes, click on the record of the person you want. Then click Select ID.
 - **If Not Sure, contact VCU Human Resources at 827-1770.**
- VERY IMPORTANT!** Make sure this person does not already exist in the system. You could get some potential matches or a match, but that does not mean the record is the same person. Once you click **Create New**, the record is in the system.
- If No, click the **Create New** icon to create the new record and then click **OK**.
10. Click the **X** at the end of the toolbar. This action should open another form called **Electronic Personnel Action (NOAEPAF)**.
 11. **Enter**/select the following in the Key block:
 - a. **ID**: The ID number will default.
 - i. If the Vid is not known, use the **Search** function ( - drop-down down arrow) on the right hand side of the ID field (choose the Search function SOAIDEN – List For Person).
 - b. **Transaction**: Leave blank.
 - c. **Query Date**: Date of information desired.
 - i. *Note – You can use today's date as a default*
 - d. **Approval Category**: AFNEW1 (Affiliate Identification).
 - e. **Approval Type**: AFNEW1 (Affiliate Identification).
 12. **Next Block** (or **Ctrl/PgDn**).
 - a. If you receive a message that says, “*WARNING* User does not have access to view current values,” **STOP!** Contact HR Operations at 827-1770 because you do not have access to this person's data.

13. If a box pops up that says “Telephone Options,” click NEW. (This box may not appear.)
14. Leave the Telephone Seq. No. field blank.
15. Telephone Type defaults to AF; do not change this.
16. Complete the Area Code and Telephone Number fields; do not use dashes or parentheses.
 - a. Example for Area Code field: 804
 - b. Example for Telephone Number field: 5551212
17. On the Unlisted Telephone row, designate whether or not you want the Affiliate to show in the VCU Directory.
 - a. Type “Y” for Yes in the “Unlisted Telephone” field if you do not want to publish the affiliate’s information in the People Search.
 - b. Type “N” for No in the “Unlisted Telephone” field if you want to publish the affiliate’s information in the People Search.
18. On the Citizenship row, loaded affiliates will have a defaulted value of Y (Yes). If the Affiliate is a non-citizen, change it to N (No).
19. On the Ethnicity row, loaded affiliates will have a defaulted ethnicity of “6” for Unknown. Under the heading **NEW VALUE**, click on the drop-down and select the Ethnicity that applies to the Affiliate.




20. **Save** ( or **F10**).
21. Click Options>Submit Transaction.
 - a. If you successfully submitted your transaction, the transaction status will change from “Waiting” to “Approved.”
 - b. If an error occurs, this transaction is not complete. If you have an error, the Electronic Approvals Error Message (NOIEMSG) form will appear.
 - i. Hit Next Block to see the error(s) that has occurred with this transaction.

STOP! You have not finished entering the new affiliate. There is one more step that needs to be done. Before you move on to the next step, there is a process that runs behind the scene in Banner that will move this transaction to complete. **This process runs every ten minutes**, so check back on this transaction; when you see it in a status of complete, you may move on to the step below.

- ii. Contact HR Operations if you don’t understand the error(s).
22. Key **NOAEPAF** in the Go To box and press “**Enter**.”
23. **Enter**/select the following in the Key block:
 - a. **ID**: Enter the **Vid** of the desired employee.
 - i. If the Vid is not known, use the **Search** function ( - drop-down down arrow) on the right hand side of the ID field (choose the Search function SOAIDEN – List For Person).
 - b. **Transaction**: Leave blank.
 - c. **Query Date**: Date of information desired.
 - ii. *Note – You can use today’s date as a default.*
 - d. **Approval Category**: AFNEW2 (Affiliation)
 - e. **Approval Type**: AFNEW2 (Affiliation)
24. **Next Block** (or **Ctrl/PgDn**).
 - a. If you receive a message that says, “*WARNING* User does not have access to view current values,” **STOP!** Contact HR Operations at 827-1770 because you do not have access to this person’s data.

25. The first two rows will be defaulted:
 - a. Employee Status (defaults to A)
 - b. Employee Class Code (defaults to AF)
26. In the Employee Group Code row, under the heading **NEW VALUE**, click on the drop-down and select the Affiliate Group code that applies.
27. The Home COAS field will default to V. Do not change this.
28. In the Home Organization row under the heading **NEW VALUE**, key in the Home Organization code for the Affiliate.
29. The Distribution COAS will default to V. Do not change this.
30. In the Distribution Organization row under the heading **NEW VALUE**, key in the same data that you keyed in as the Home Organization value.
31. In the Current Hire Date row under the heading **NEW VALUE**, key in the Start Date for the Affiliate.





32. **Save** ( or **F10**).
33. Click Options>Submit Transaction.
 - a. If you successfully submitted your transaction, the transaction status will change from “Waiting” to “Approved.”
 - b. If an error occurs, this transaction is not complete. If you have an error, the Electronic Approvals Error Message (NOIEMSG) form will appear.
 - i. Hit Next Block to see the error(s) that has occurred with this transaction.
 - ii. Contact HR Operations if you don’t understand the error(s).

Renewing Affiliates (AFREN)

Affiliates must be renewed each year in order to ensure access remains for those still affiliated with the University.



Instructions

1. Log in to Banner.
2. If you haven’t already done so, set up your routing queue. See instructions on page 5 (select the approval category AFREN for this ePAF).
3. Key **NOAEPAF** in the Go To box and press “**Enter**.”
4. **Enter**/select the following in the Key block:
 - a. **ID**: Enter the **Vid** of the desired employee.
 - i. If the Vid is not known, use the **Search** function ( - drop-down down arrow) on the right-hand side of the ID field (choose the Search function SOAIDEN – List For Person).
 - b. **Transaction**: Leave blank.
 - c. **Query Date**: Date of information desired.
 - i. *Note – You can use today’s date as a default.*
 - d. **Approval Category**: AFREN (Affiliate Renewal).
 - e. **Approval Type**: AFREN (Affiliate Renewal).
5. **Next Block** (or **Ctrl/PgDn**).
 - a. If you receive a message that says, “*WARNING* User does not have access to view current values,” **STOP!** Contact HR Operations at 827-1770 because you do not have access to this person’s data.

6. In the Current Hire Date row under the heading **NEW VALUE**, key in the Renewal Date for the Affiliate.
 - a. Key July 1 of the current year.
 - b. For example, if today is June 4, 2008, key July 1, 2008 to renew the affiliate for the upcoming year.
7. **Save** ( or **F10**).
8. Click Options>Submit Transaction.
 - a. If you successfully submitted your transaction, the transaction status will change from “Waiting” to “Approved.”
 - b. If an error occurs, this transaction is not complete. If you have an error, the Electronic Approvals Error Message (NOIEMSG) form will appear.
 - i. Hit Next Block to see the error(s) that has occurred with this transaction.
 - ii. Contact HR Operations if you don’t understand the error(s).

Terminating Affiliates (AFTERM)

Instructions

1. Log in to Banner.
2. If you haven’t already done so, set up your routing queue. See instructions on page 5 (select the approval category AFTERM for this ePAF).
3. Key **NOAEPAF** in the Go To box and press “**Enter**.”
4. **Enter**/select the following in the Key block:
 - a. **ID**: Enter the **Vid** of the desired employee.
 - i. If the Vid is not known, use the **Search** function (SOAIDEN) ( - drop-down down arrow) on the right-hand side of the ID field.
 - b. **Transaction**: Leave blank.
 - c. **Query Date**: Date of information desired.
 - i. *Note – You can use today’s date as a default.*
 - d. **Approval Category**: AFTERM (Affiliate Termination).
 - e. **Approval Type**: AFTERM (Affiliate Termination).
4. **Next Block** (or **Ctrl/PgDn**).
 - a. If you receive a message that says, “*WARNING* User does not have access to view current values,” **STOP!** Contact HR Operations at 827-1770 because you do not have access to this person’s data.
5. The Employment Status row will default to T. Do not change this.
6. The Term Reason Code defaults to 78 (Separation – Other). Do not change this.
7. In the Termination Date row under the heading **NEW VALUE**, key in the Termination Date for the Affiliate.
 8. **Save** ( or **F10**).
 9. Click Options>Submit Transaction.
 - a. If you successfully submitted your transaction, the transaction status will change from “Waiting” to “Approved.”
 - b. If an error occurs, this transaction is not complete. If you have an error, the Electronic Approvals Error Message (NOIEMSG) form will appear.
 - i. Hit Next Block to see the error(s) that has occurred with this transaction.
 - ii. Contact HR Operations if you don’t understand the error(s).