The purpose of this presentation is to provide a full training of the 3G process for department and SSC staff who have either not used the system before or have used the system but would like a refresher.

The software we use to route the forms is the Perceptive Content client. You may hear us refer to the system as Image Now or Perceptive Content during our discussion today. Perceptive Content bought Image Now, so we're trying to use the updated terms. You may begin to hear this name more often in the future.
The purpose of the 3G workflow is to consolidate graduate student appointments and sponsorships into a single process. The 3G system handles appointments for Graduate Teaching Assistants, Graduate Research Assistants, and Graduate Assistants.

We use Perceptive Content to collect information and generate reports, replacing the old paper form routing. The use of this system allows for several benefits, including:

- Workflow and data extracts to central offices
- Improved visibility and transparency – now you can see where the forms are in the workflow and when they are complete.
- Faster and more accurate student billing
- Efficiency in the process resulting in time savings
- Repetitive forms – the sponsorship form and TAP requests – are incorporated into the workflow
- Forms can be processed quickly in this system, which is beneficial to the students.
Once a candidate is recruited by the hiring unit and the student agrees to the work, the department staff initiates the 3G process by creating a form to route forward. The form will route through workflow based on selections made regarding that student’s situation.

After the form is routed forward from the department queue,
- SSC finance and/or research staff review and add funding and sponsorship information
- SSC HR staff review new and rehires, and position data updates
- KUCR and Graduate Studies review the form for policy compliance
- Central HR key the Position Data Updates from the 3G form

Central HR only manages the position data updates for the forms. An automated upload to Brass Ring and then 2XO Onboarding facilitates the official offer process, online signature and any needed onboarding.

Student accounting services and the registrar are not part of the 3G workflow however they do pull reporting directly from Perceptive Content for processing.
When hiring a 3G student, there are several considerations to keep in mind. The student must be degree seeking, in academic good standing, and enrolled in at least six credit hours (there is an exception to this; special approval can be given to students taking one credit hour under certain circumstances).

Consider the duties involved when assigning the type of 3G form to submit - teaching, research, or other.

The student’s FTE will determine how much of the sponsorship or waiver the student receives. (GTAs technically receive waivers rather than sponsorships.)
The tuition assistance pool (TAP) is available to students meeting specific criteria. TAP can be considered for GRAs if
• The student level is either PhD or Master’s with a PhD track
• If the student’s salary source is a grant but will not allow tuition.
In order to access the 3G system, use the Perceptive Content client. This is different than using WebNow through the browser; IT will have to add this software to your computer if you don’t have it.

Select that icon and login using your online ID user name and password. Then select “workflow” from the menu bar.
The workflow folders that are visible are based on user access. This particular example is a test environment so it has multiple folders; most users will only have access to a handful of folders that are pertinent to their departments and/or SSCs.
In the 3G system, forms move through the various workflow stages by routing. When the department is finished with their portion of the form, it is routed to the appropriate SSC queue based on selections within the form. GTA forms route to SSC finance staff and GRA forms route to SSC research staff.

When you are ready to move the 3G form to the next step in workflow, select “Workflow” from the menu bar and then “Route Forward”.

Generally, department staff initiate 3G forms. The department responsible for starting the form is the HR department the student will work for regardless of academic program or funding source.

Existing 3G students will be in the departmental queue for editing and routing forward, but new 3G hires or students new to the department will require a new form be created.
Once logged in, workflow queues are visible based on user access. New hires will need a new form created from the “3G New Form” queue. Each department has a template available in this queue.

Open that queue, navigate to the folder for the department hiring the student and select the form by double clicking it.

Students who have worked in a 3G appointment recently will have a form loaded to the departmental queue that can be adjusted and routed forward.
A blank form will open – copy that document for use. It’s important to note that each department has one blank form and if it’s used to route forward rather than being copied, there won’t be a blank form for future use in the queue.

Go to the menu bar, to File, and select Copy Document.
When the copy document window opens, select “None” for the “Application Plan”. Enter the student’s name in the “Name” field. Make sure the “Send to Workflow Queue” checkbox is selected and choose “3G New Form” from the dropdown menu. Click OK. Some of the editing functions are only available in the 3G New Form queue, so be sure to send it here and not to your departmental queue.
Close the form you copied from. Refresh the workflow queue by clicking on the green "go" arrow or the refresh icon and you will see the form you just created.

Use the newly copied document to enter information and route forward to the department queue. When you enter information, be sure to save the document before closing it or routing it forward.
In the Student appointment section, you will just need to enter the “Student ID” field. The “Name,” “Email Address,” and “Employee ID” (if the student has one) will auto-populate. These fields will not be editable. If the student does not yet have an employee ID, the field will say “NEW”. If you need to make a change, re-enter the student ID, click the magnifying glass again and the forms will re-populate.

If the student is not a current KU employee, the name field will be blank. You may then type in the student’s legal name to the best of your knowledge.

The email address will default to the student’s KU email address. Departments will need to remind their students to check their KU email address for any updates about this position.

Add the “HR Department ID” and “HR Department Name”. The “Position Number” may be left blank for the SSC to complete.
• In the Appointment Information Section, choose “Appointment Type” and “Action”. Choose the action that is appropriate for this student. “Rehire, within 1 year” for anyone who has held a KU appointment within the last year, including a student hourly position or any other KU position; “Rehire, outside of 1 year” for those who have been employed by KU but not within the last year in any capacity or “Hire - new to KU” for someone who has never had a job with the University. "Sponsorship Only" is selected in the for a GRA (or possibly a GA) whose appointment continues, but who needs sponsorship for the upcoming semester.

• Check the correct checkbox if the student is either a “First-time 3G Appointment”, a “First Time GTA” or an “International” student.

• Choose the correct “Appointment Period” and include a “Start Date”. GTAs must follow the proscribed term dates. However, GRAs or GAs can be ongoing. If you want this option or are unsure of the ending date, you may leave the “End Date” blank. Appointment Periods with set dates will auto-populate the start and end date. For GRAs and GAs without an end date, be sure to notify the SSC when you are ready for the appointment to end so that the student is not overpaid.
• Enter the “Standard Hours. “Frequency Amt” and /or “Total Contract Amount”.

• Enter the “Program Level”. A new option now appears in the Appointment Information section. Instead of listing the course assignments, departments will only need to choose the “Course Level” of 0-499, 500-699 or 700+. If the 700+ choice is made, the form will route to a HOLD queue until the Office of Graduate Studies has reviewed and approved the appointment.

• Enter “Supervisor Name”. The SSC will enter the “Reports to Position number” if you don’t know it.

• Standard position descriptions are assumed and auto populate based on other selections.

• The SSC will enter the “Req ID”. This field will allow the SSC to indicate the appropriate hiring requisition in BrassRing.
• A brief description of GA duties will auto-populate depending on whether the frequency is chosen as biweekly or hourly.

• The SSC will enter the “Req ID”. This field will allow the SSC to indicate the appropriate hiring requisition in BrassRing.
• The “Describe How Duties Relate” field is required for GRA appointments.
• The SSC will enter the “Req ID”. This field will allow the SSC to indicate the appropriate hiring requisition in BrassRing.
- If the appointment is for a GTA appointment, the form will allow multiple appointment periods. For instance, if a GTA is appointed at 0.25 FTE in the fall, and 0.50 FTE in the spring, the department will now be able to enter both appointments by selecting "Multiple" in the appointment period drop down list and then selecting "add appointment" to the form. Addition of multiple appointments is restricted to GTAs only. Individuals holding or appointed to concurrent appointments such as GRA AND GTA will need a separate form for each position number.
• In the Policy Checks section, choose the radio button to indicate whether or not the student is in “Academic Good Standing”. Students who are not in academic good standing should not generally be appointed as 3Gs.

• You may edit the student’s academic department by looking up either “Department Number” or “Department Name”.

• Enter any "Comments" which will help others to understand the specifics of this 3G appointment. Indicate any unique details of this student’s position. Enter your name in the “Submitted By” field and route the form Forward.
• For first time GTAs, you must choose the correct radio button to indicate if the student is a “Non-Native English” speaker or not. If yes, a section will open in the form where departments will need to agree to a statement acknowledging its obligation to interview the student and document spoken English language proficiency before the GTA begins teaching and that the documentation will be retained in a permanent file in the department.

• If the student’s academic department is not the same as the hiring department, an out of field section will open in the form regarding approval from the academic department and that the documentation will be retained in the student’s permanent record. Please be sure to use the department level information when using the lookup rather than the cost center.

• Graduate Studies will audit departments for compliance with this record-keeping throughout the semester.
To hire a returning 3G student, go to your department’s queue. A form will be loaded for each student with the previous semester’s information. Double click the form for the student you would like to rehire.

In order to rehire a student who has been a 3G in another department or who was a 3G in your department prior to one year ago, follow the steps for a new 3G hire.

You will not be able to make any changes in the Student appointment section. If you see anything which is incorrect, contact your SSC representative to help determine how best to fix it.

The email address will default to the student’s KU email address. Departments will need to remind their students to check their KU email address for any updates about this position.
• In the Appointment Information Section, choose “Appointment Type” and “Action”. Choose the action that is appropriate for this student. “Rehire, less than 1 year” for anyone who has held a KU appointment within the last year, including a student hourly position or any other KU position; “Rehire, greater than 1 year” for those who have been employed by KU but not within the last year in any capacity or “Hire - new to KU” for someone who has never had a job with the University.

• Check the correct checkbox if the student is either a “First-time 3G Appointment”, a “First Time GTA” or an “International” student.

• Choose the correct “Appointment Period” and include a “Start Date”. GTAs must follow the proscribed term dates. However, GRAs or GAs can be ongoing. If you want this option or are unsure of the ending date, you may leave the “Termination Date” blank. The SSC will enter a termination date for GTAs if it is blank. For GRAs and GAs, be sure to notify the SSC when you are ready for the appointment to end so that the student is not overpaid.

• Enter the “Standard Hours”, “Frequency rate” and “Frequency OR “Total Contract Amount”. You may refer to the information listed in the grey section which
reflects the previous semester’s details. In general, the pay rate should be the same or higher as in previous semesters.

• If the appointment is for a GTA appointment, the form will now allow multiple appointment periods. For instance, if a GTA is appointed at 0.25 FTE in the fall, and 0.50 FTE in the spring, the department will now be able to enter both appointments by selecting the add next appointment to the form. Addition of multiple appointments is restricted to GTAs only. Individuals holding or appointed to concurrent appointments such as GRA AND GTA will need a separate form for each position number.

• Enter the “Program Level”. A new option now appears in the Appointment Information section. Instead of listing the course assignments, departments will only need to choose the “Course Level” of 0-499, 500-699 or 700+. If the 700+ choice is made, the form will route to a HOLD queue until the Office of Graduate Studies has reviewed and approved the GTA teaching a graduate-level course.

• Enter “Supervisor Name”. The SSC will enter the “Reports to Position number” if you don’t know it. If the appointment is a GRA or GA appointment, departments will no longer be required to complete the “Duties” or “Describe How Duties Relate” fields. A brief description of GA duties will auto-populate depending on whether the frequency is chosen as biweekly or hourly.

• The SSC will enter the “Req ID”. This field will allow the SSC to indicate the appropriate hiring requisition in BrassRing.
3G Process: SSC
• When a department sends their form forward, it will route to an SSC Finance queue if it is a GTA or GA, or to an SSC Research queue if it is a GRA. Be sure to check your assigned queue regularly during peak 3G times.

• To open a form, double click on the form. Once you route it forward, the next form in the queue will automatically open for you.

• Review the information submitted by the department. Confirm that the following fields are entered: Student name, “Email address”, “HR department”, “Appointment type”, “Action”, “Appointment period”, “Standard Hours” and either “Frequency amount” or “Total Appointment”, “Course level” for GTAs, “Program level”, “supervisor name”, “Academic good standing” and “Academic department”. If any of these fields are not completed, collect the information from the department, either by routing the form back, or by entering the correct information yourself after consulting with the department. Route back to department requires manager intervention.

• Review any department “Comments”.

• Enter the “Funding (Salary)” information and “Pool ID” into the correct fields.
You may request funding and pool set-up for project-related source using the 3G form – however funding and pool set-up by the budget office will need to be processed outside the 3G workflow prior to routing your form.

- If the student is a GTA or a GA with no sponsorship, enter any appropriate “Comments”. Comments should entered into the relevant comments box – appointment comments should go in the "SSC Comments" section and sponsorship comments should be entered in the "Sponsorship Comments" box. All comment boxes will not be visible in every queue. Include the date and your name after each comment and route the form forward. If the student is a GRA or a GA with a sponsorship, complete the sponsorship section.
• Enter the “Funding (Salary)” information and “Pool ID” into the correct fields. You may request funding and pool set-up for project-related source using the 3G form – however funding and pool set-up by the budget office will need to be processed outside the 3G workflow prior to routing your form.

• If the student is a GTA or a GA with no sponsorship, enter any appropriate “Comments” – be sure to include the date and your name – and route the form forward. If the student is a GRA or a GA with a sponsorship, complete the sponsorship section.
• Enter the “Funding (Salary)” information and “Pool ID” into the correct fields. Background check funding will need to be provided for new hires in this section as well.

• If the student doesn’t have a sponsorship, enter any appropriate “Comments” – be sure to include the date and your name – and route the form forward.

• Move on to the Sponsorship section.
• If the form contains both appointment and sponsorship information, the form will split and there will be a separate workflow for the appointment and the sponsorship. If both of these aspects are ready, SSC Finance or Research will need to identify that in the Properties section.

• To open the Properties section, click View and select properties so that it has a checkmark.
• The sponsorship section indicates how tuition and fees will be paid for the student.

• This section will allow you to select the funding that will be used to pay the tuition and fees. The form will route to further workflow queues based on checkboxes selected for funding type.

• Please note: Sponsorship Only forms do not need funding for salary added. Leave the fields in the “Funding (Salary)” section blank.
• If the sponsorship support will come from TAP, a section specific to that request will open.

• The “SSC TAP Request” should include information regarding why that funding source is appropriate. For example, if the salary is paid from a grant but the grant will not pay tuition, TAP is an option and that comment can be added to this field.

• In the “TAP Funding Requested By” and “Email” fields, enter your contact information. That way if anyone has questions about this portion of the 3G form, they can contact you to get more information.

• Do not fill in the amount or percentages, as the TAP Funding representative will complete that. If the sponsorship support will not come from TAP, a section specific to the sponsorship funding will open once a selection is made between Amount and Percent.
• Indicate the amount or percent of tuition, course fees, required campus fees and international fees. If using the amount rather than percentage, indicate those dollar amounts in for each type of payment.

• In the “Sponsor Reference” field, enter the department information that “owns” the funding used to pay tuition and fees.

• In the “Sponsor Contact Name”, “Phone” and “Email” fields, enter your contact information. That way if anyone has questions about this portion of the 3G form, they can contact you to get more information.

• In the “Department ID”, “Fund”, “Project” and “Account” fields, enter the funding string that will be used to pay tuition and fees.

• If there is more than one source of funding supporting the student’s tuition and fees, select “add new row”. This will open another section to indicate the amount/percent, the sponsoring department, and the funding string.

• In the “Term” field, indicate the proper term from the list that appears.
• The “Student ID” field will autofill from prior section and should not need to be adjusted.

• In the “Sponsorship Comments” field, indicate any additional information related to the tuition and fees that may be helpful.
• Percentage amounts can be adjusted using the drop down boxes. Please note these percentages are limited to 25%, 50%, 75% or 100%. If you want to pay a different percentage than one of those choices you will need to use the “amount” and calculate that information instead.

• Fill out the rest of this section as discussed on the previous slide.
• If the form contains both appointment and sponsorship information, the form will split and there will be a separate workflow for the appointment and the sponsorship. If both of these aspects are ready, SSC Finance or Research will need to choose "3G Ready" Yes in the Properties section.

• If the appointment information is ready, but the sponsorship is not yet ready, choose "3G Ready" No in the properties section. This will route a copy of the sponsorship to a separate sponsorship queue for further review. If you have an attachment that is sponsorship critical, you will need to re-attach it in the sponsorship queue.

• The 3G Ready will default to "No" so if you don't need to review the sponsorship again, you will need to take action and change the answer to "yes".
The selections in the form will determine what options the SSC staff have for routing. This is the last queue where the entire form is visible at once. In all subsequent queues only a portion of the form will be visible. Be sure comments for sponsorship are in the sponsorship box and appointment comments are in the SSC Comments box.

Additionally, sponsorship only forms – situations where the student is already working as a G for the department but needs the tuition to be paid – do not route to the SSC HR queues because there isn’t an action for SSC HR to take.

In the SSC, finance and research staff can route forms to each other or to the SSC HR staff because there are times when the form needs to be moved between the two groups. For example, GRA forms route to SSC research staff but if they are state funded, the research staff will route the form to the finance staff to fill out the funding information.
The form routes through quite a few different places. It also triggers notifications to Student Accounting Services to key the sponsorship, and to the Registrar's office to add GTA waivers.
• When the SSC Finance and Research staff complete their review and send the form forward, it will route to the first of three SSC HR queues. Be sure to check your assigned queue regularly during peak 3G times.

Review the information submitted by the department. The student’s email and employee ID (if they have one) will automatically populate. Check the student name to confirm it matches HR/Pay. Check HR/Pay to see if the student has any other appointments at KU, and review Perceptive Content to see if other 3G forms are routing through. Add a vacant “Position number” if that field is blank. If a number is already entered, confirm that it will be vacant when this student’s appointment begins.

• Confirm that the “Action” is correct to match any other KU appointments. Confirm that the checkboxes are correct for “First Time 3G”, “First Time GTA” or “International”.

• Ensure that the start and end dates seem accurate.

• If the “Standard hours” are over 20, confirm that the appropriate approvals are attached. If the student has another appointment on campus, ensure that the
total hours do not exceed 29 and that any appropriate approvals are attached. International students should never work over 20 hours per week total between all appointments.

• Calculate either the “frequency amount” or “total contract amount” with the information provided. If both are provided, confirm that the calculations match. The frequency amount should generally not be below the previous semester’s frequency amount without a compelling reason.

• Enter the supervisor position number if blank. Confirm that the position number is correct if it is already populated.

• Add the department’s BrassRing 3G req number in the “Req ID” field.

• Confirm that the department has responded to the Policy Checks

• Review any “Department Comments”.

• Once you have determined that everything is correct and all appropriate documents are attached, add a comment that you have reviewed the form – include the date and your name in the “Comments” section of the Shared Service Center / Program Manager: comments section, and route the form forward. Please note that this will now route to the next step and generate an offer form for the student. It is much easier to change something when the form is in the HR queue or before.

• HR HOLD queue - If the radio button for 700+ course-level is checked, the form will route to the HR HOLD queue once it is sent forward from your HR queue. It will also initiate a process for Grad Studies to work with the department on the necessary approvals. If GS approves the request, a notification will be sent to the SSC main email. It should be attached to the form, the check box checked that it has been received, and the form routed forward.

• Forms will also route to the Hold queue for other reasons, so be sure to check it regularly. GTA salaries below the approved minimum, and first time international GTAs who don’t yet have the SPEAK test scores will route to this queue. The Notes section of the form’s properties will tell you why the form is in the hold queue. To turn this feature on, go to View and click Properties.
• Click 700+ level checkbox when petition approval is received and route forward
• Turn on Properties by View > Properties
• After it has been routed forward from the initial SSC HR queue, the form will export data to a spreadsheet which is used to generate an offer form for the student in the BrassRing requisition listed on the 3G form. It will then route through other checks and return to the SSC HR staff in the “SSC BrassRing” queue.

• These requisitions are only for 3Gs to route from Perceptive Content into 2XO Onboarding. No one will ever apply to them. If a department wants to run a search for a 3G, they should post a search in the student gateway as normal. Once they have selected a candidate, they would need to submit a form through the 3G Perceptive Content process.

• To finish the form, open it in the SSC BrassRing queue in Perceptive Content. At the same time, look up the corresponding requisition in BrassRing, and open the student’s offer form. Review the details that have populated in the offer form by comparing them to the 3G form.

• Look for other potential appointments the student may have. Review the 3G system for other forms routing through the workflow. Review the student’s talent record for other pending job offers. Review the electronic Onboarding
system for any records already in process. If the student has a concurrent record in any of these systems, coordinate with the appropriate SSC HR representative to ensure that only one record goes through Onboarding at one time. Otherwise, the second record will override the first record.

• Choose the correct onboarding path. Confirm that the state code is correct.

• Once you’ve confirmed that it is okay to send your record through to Onboarding, move the applicant’s status through the appropriate steps.

* Route the 3G form in Perceptive Content forward. It will move to your SSC 2XO queue where it can remain until the process has been completed.

• Once the applicant is moved into Onboarding, monitor his or her status through the process. Work with the student to complete any necessary documents or paperwork. When the student has finished all paperwork, complete the Appointment Summary and send it to the HR Appointment Team.

• If the student is a new hire, obtain the new employee ID from the BrassRing HR/Pay Integration form and add it to the 3G form in the SSC 2XO queue.

• Once you have received the notification that the student has been keyed into HR/Pay, notify the department as appropriate. Additionally, in the 3G system, route the student’s 3G form forward. It will go to 3G Complete.
Once the applicant is moved into Onboarding, monitor his or her status through the process. Work with the student to complete any necessary documents or paperwork. When the student has finished all paperwork, complete the Appointment Summary and send it to the HR Appointment Team.

If the student is a new hire, obtain the new employee ID from the BrassRing HR/Pay Integration form and add it to the 3G form in the Onboarding queue.

Once you have received the notification that the student has been keyed into HR/Pay, notify the department as appropriate. Additionally, in the 3G system, route the student’s 3G form forward. It will go to 3G Complete.
What queues should I be checking?

3G workflow
- SSC Finance
  - Finance
- SSC Research
  - Research Admin
- SSC HR
  - SSC HR queue
  - SSC BrassRing
  - SSC 2XO
  - On Hold
  - SSC HR Errors

Sponsorship workflow
- SSC Finance
  - Finance
  - Finance errors
- SSC Research
  - Research
  - Research errors
Who can I call for assistance?

- Graduate Studies
  - Amber Roberts Graham (x7332)
    - amberts@ku.edu
  - Amanda Ostreku (x6040)
    - amanda@ku.edu
  - Andrew Beets (x3117) - IAP
    - abeets@ku.edu

- KU CR
  - Karen McDonald (x7428)
    - kemcdowell@ku.edu
  - Renee Yu (x6387)
    - yu.ren@ku.edu

- 3G functional questions
  - Jessica Johnson (x6813)
    - jessie@ku.edu
  - Sara Crangie (x6005)
    - coltax@ku.edu
  - Kelly Blackburn (x0767)
    - Kelly.blackburn@ku.edu

- Your SSC support staff!
  - https://ssc.ku.edu/people