

DuckDocs Graduate Employee PRF User Guide

The purpose of this document is to describe how to use the Graduate Employee (GE) Payroll Request Form (PRF) and Workflow in the OnBase web client. This guide provides an overview of the features and functionality, and details how to gain access to the form and workflow, and how to request help. Note: The GE-PRF is used to submit payroll/hire information for UO Graduate Employees.

Table of Contents

Gaining Access and Setting User Permissions	2
Requesting Help	2
GE-PRF Workflow Queues	2
Submitting the GE PRF Form	3
Accessing the Form.....	3
Completing the Form.....	3
Step One: Student Information	3
Step Two: Purpose.....	3
Step Three: Job Detail.....	5
Step Four: Accounting (Labor Distribution).....	7
Attachments (If Applicable).....	7
Step Five: Submission Information.....	7
Departmental Contacts	7
Department Approval.....	8
Submission Revision	8
Viewing PRFs &.....	9
Status Check	9
Viewing a GE PRF	9
Multiple GE-PRFs	9
Appendix A: Breakdown of Purpose Types	10
Create New Appointment	10
Revise Existing Appointment.....	10
Terminate Appointment.....	11
Appendix B: GE Levels	12
Appendix C: Appointment Dates	12

Gaining Access and Setting User Permissions

To access GE-PRFs (aka **ePRFs**), Graduate Studies must update your DuckDocs user permissions to include the GE-PRF workflow. Training is required before access is granted. To request training, email graduatestudies@uoregon.edu.

- 1. DuckDocs Access:** Check your application access by logging into [DuckDocs](#) with your DuckID. (Note: Either on-campus internet connection or UO VPN is required to login to the application.)
 - a. Most users have access to the [DuckDocs](#) application automatically based on their faculty and staff affiliation. If you are unable to log in, submit a [Business Application Request](#) in the UO Service Portal to gain access to DuckDocs.
- 2. User Permissions:** Once you've verified your **DuckDocs** access, email graduatestudies@uoregon.edu to request one of the following roles (be sure to cc your manager):
 - a. **Submitter** – allows you to see all GE-PRFs and submit new GE-PRFs.
 - b. **Approver** – you must indicate approver Org Code(s) so that any GE-PRFs submitted using those Org Codes will route to you for approval. Note: Approvers are also granted Submitter rights.
 - c. **Reviewer** – allows you to see all GE-PRFs.

Requesting Help

- To report technical issues or request technical support for DuckDocs, please submit a [DuckDocs \(OnBase\) Support Request](#).
- For hiring policy or guidance in completing the GE-PRF, contact: graduatestudies@uoregon.edu.


GE-PRF Workflow Queues

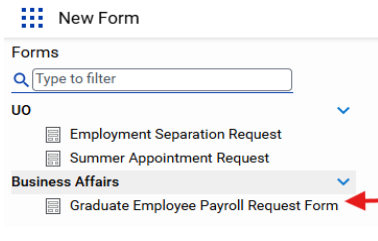
The **BA – Graduate Employee PRF** workflow in OnBase contains several queues. These queues reflect the status of each GE-PRF (i.e., where they are in the workflow).

- **Department Review:** Pending review by Department Approver
- **Submission Revision:** Sent back to the Submitter for revision
- **Graduate Studies Review:** Pending Graduate Studies review
- **Graduate Studies Review – Additional Info needed:** Additional Graduate Studies review needed. Units may be contacted if additional information is needed
- **Payroll Review – Initial:** Pending Payroll review
- **Payroll Review – Future Terms:** Pending Payroll review for GE-PRFs affecting future terms
- **Payroll Review – Additional Info Needed:** Payroll is awaiting additional information or new hire documents
- **Payroll Review – Ready for Banner Update:** GE-PRFs ready to be added in Banner
- **GE Leave Pending:** Non-academic leave notices for Graduate Studies tracking purposes
- **Canceled:** GE-PRFs canceled by Submitter (Note: This is different than a “termination”)
- **Complete:** Processing is complete, and Banner has been updated

Submitting the GE PRF Form

Accessing the Form

- Navigate to [DuckDocs](#) and click **OnBase Web Client**. Login with your Duck ID credentials.
- Click the menu icon  in the upper left corner and choose **New Form**.
- Select **Graduate Employee Payroll Request Form** under Business Affairs.

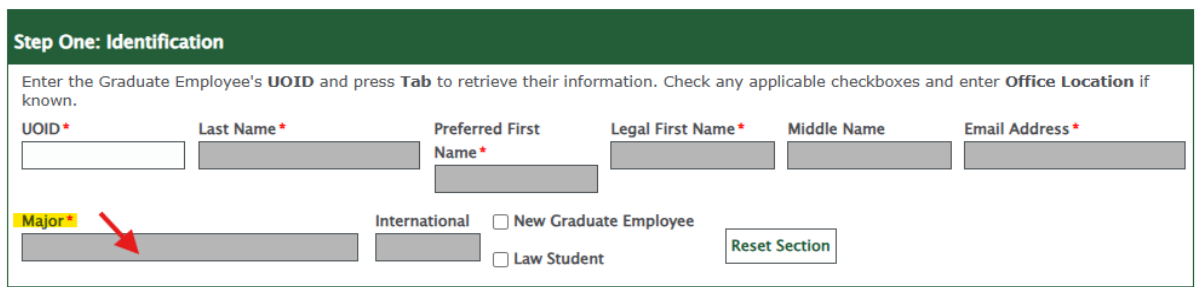


- Note: This form is not designed to be printed. If you need to print a copy of the form for your records, it is advised that you navigate to the submitted form via Document Retrieval (see Viewing PRFs in the System for instructions), take a screenshot of the form and print the image to maintain formatting.

Completing the Form

Step One: Student Information

- Enter the **UOID** of the Graduate Employee and press **Tab** to autofill their information.
- Each red astris indicates a required field. *If the "Major" does not populate, STOP.* Reach out to Graduate Studies (graduatestudies@uoregon.edu) to inquire about this GE's student status.



- You may use the **Reset Section** button if you need to change the GE's UOID and/or other information.

Step Two: Purpose

There are three categories—create, revise, and terminate. Depending on what you select, a list of options will appear.

See [Appendix A: Breakdown of Purpose Types](#) for more detailed information. Below is a summary:



Create New Appointment

Use to:

- Hire a GE
- Provide a GE with a second appointment on top of their existing appointment
- Submit a One-Time-Payment

Create New Appointment
 Revise Existing Appointment
 Terminate Appointment

Create New Appointment

Select One: *

Hire a New Graduate Employee (first appointment as a UO GE)
 Additional Appointment (add an appointment for the same term)
 Reappointment (hire a GE who has previously held a UO GE appt)
 Other (add details in remarks)

Revise Existing Appointment

Use to:

- Promote or correct a GE's level
- Change the GE's job location (e.g., GE working outside of Oregon)
- Change the Labor Distribution (Index)
- Change the FTE
- Change the Position Type (e.g., Teaching to Research)
- Give notice that an employment leave claim is in the works

Create New Appointment
 Revise Existing Appointment
 Terminate Appointment

Revise Existing Appointment

Select all that apply (at least one is required): *

Level Change FTE Change
 Job Location Change Position Change
 Labor Distribution (Index) Change GE Non-academic Leave Pending

Terminate Appointment

Use to:

- End an existing GE appointment
- Cancel a GE appointment prior to start

Create New Appointment
 Revise Existing Appointment
 Terminate Appointment

Terminate Appointment

Terminate GE Appointment (add details in remarks)

The Appointment Dates field will default to **Other**, and the **Work End** field will appear in the Job Detail section as a required field. Enter the GE's last day of work.

Be sure to add clarifying information in the Submitter Remarks field as needed.

Time Entry Department * Appointment Dates *
 Org * [Text Field] OTHER

Level Base Rate Calculate Other Appt. Dates Work End *

[Dropdown] [Text Field] [Button] [Text Field] [Text Field]

Step Three: Job Detail

Time Entry Org

Entering the correct **Time Entry Org** for the **hiring unit** is critical to ensure:

- GE-PRF routes to the correct Approvers
- Correct GE Base Rate is applied
- Hiring unit is correctly displayed on the Notice of Appointment

Note: Please contact graduatestudies@uoregon.edu before using a Time Entry Org code that has not been used in the GE-PRF workflow prior.

Step Three: Job Detail

Please fill out all required and applicable fields. To auto-fill **Department**, enter the **Time Entry Org** and hit **Tab**. To calculate the **Base Rate**, enter the **Time Entry Org**, **Appointment Dates** and **Level**. If Base Rate does not populate, click **Calculate**. If this appointment is for Summer Teaching, please select **Summer Teaching** in the **Position** field, and fill out the Summer Teaching section below.

Time Entry Org* 265000 Department* Graduate School Appointment Dates*

Level* Base Rate* Calculate

Position* Suffix* Job Location* Eugene, OR, USA

Workers' Comp Code

Appointment Dates

Select from the list of standard contract dates. See [Appendix C: Appointment Dates](#) for a list.

Note: Changes to prior year contracts: If you need to submit a revision GE-PRF for a prior period (not listed), you may select Other and enter the prior appointment dates.

Appointment Dates*

- 16-SEP-25 - 15-DEC-25
- 16-SEP-25 - 15-MAR-26
- 16-SEP-25 - 15-JUN-26
- 16-DEC-25 - 15-MAR-26
- 16-DEC-25 - 15-JUN-26
- 16-MAR-26 - 15-JUN-26
- OTHER

GE Levels

The GE levels are defined in the UO-GTFF CBA and reflect the GE's academic progress.

See [Appendix B: GE Levels](#) for definitions and required support documentation.

Base Rate

The salary base rate should autofill after the Time Entry Org, Appointment Dates, and GE Level are entered. If the Base Rate field does not autofill, click Calculate to help it along.

Base Rate*

Calculate

Note: The base rate is the equivalent of 1.0 FTE, 9-month salary. Notify graduatestudies@uoregon.edu if you believe there is an error.

Position (Teaching/Research/Admin)

The appointment dates entered above will affect what positions appear in the pull down. Be sure to select the correct position for the specific appointment.

Worker's Comp Code

This will default to the correct code.

Suffix

The suffix is usually 00, however, the number will increase if the GE concurrently holds multiple appointments with the same position type. For example: a GE with two research appointments with two units in Fall term, the first appointment is 00 and the second is 01.

Select all boxes that apply, including dependent fields.

- **1st Term Level II:** If the appointment is the first term, the student is being hired at Level II, check this box and choose the applicable reason.
 - If “Master’s in same/cognate field” is chosen, you must provide the following info in the “Submitter Remarks” section: (1) name of the institution where they received their master’s degree, and (2) conferral date.
 - The other two choices require that an attachment is uploaded to the GE-PRF. A link to a Level 2 memo template is available on the [Graduate Employees \(GEs\) Levels of Appointment webpage](#).
- **1st Term Level III:** This box should be checked the first time the GE is hired at Level III. *Note: Advancement to candidacy must be fully approved by the Division of Graduate Studies before a level III appointment can be processed.*
- **Level III Funded on Grant:** If the GE is level III and being paid on a grant, check this box in order to receive [Level III grant support](#).
- **Cross College:** Check this box if hiring a student from another school/college (i.e. CAS dept hires a COE student) and enter the student’s home school/college. *Note: More information about Cross College hires is available at the [Graduate Studies webpage](#).*

Select all that apply:

1st Term Level II (Choose One):

Master’s in same/cognate field

- Enter School Name and Conferral Date in "Submitter Remarks"

45 Credit Hours - Attach memo

Successfully Completed Qualifying Exam - Attach memo

1st Term Level III

Level III Funded on Grant

Cross College (i.e. CAS dept hires a COE student)

FTE / Monthly Salary

Enter the FTE for each term of the appointment. FTE should reflect the total hours the GE is expected to work. See [Full-Time Equivalent \(FTE\) - GE Workload/Hours webpage](#) for more information about the **minimum** and **maximum** FTE allowed.

The form will only allow you to enter FTE for the terms that are covered by the appointment dates. For example: if you select appointment dates of 16-SEP-25 - 15-MAR-26, only the Fall and Winter FTE fields will be editable (see image).

	FTE	Monthly Salary
Fall:	<input type="text" value=".49"/>	<input type="text" value="2810.80"/>
Winter:	<input type="text" value=".49"/>	<input type="text" value="2810.80"/>
Spring:	<input type="text" value=""/>	<input type="text" value="0.00"/>
Summer:	<input type="text" value=""/>	<input type="text" value="0.00"/>

This section is not required if the position is **Summer Teaching** or **One Time Payment**.

Summer Teaching

You will need to enter the required course information and FTE for Summer Teaching GE positions. Once all required fields are completed, click **Calculate Pay**.

Summer Teaching

This section will be available and required if **Summer Teaching** is selected for the **Position** above. Fill out the required fields, and click **Calculate Pay**. Note: The **Base Rate** must be calculated above for dependent fields here to populate.

Course Number *	Assigned FTE *	Actual Monthly Salary		
ABC123	.49	Reg Pay	Overload	Total
Class Start Date *	Total Course Pay	June		
6/16/2021	7642.53	1955.07		1955.07
Class End Date *	Payable FTE	July		
8/15/2021	75.21	3910.13		3910.13
Credit Hours *	Monthly Pay	Aug		
3	3910.13	1777.33		1777.33
		Sept		
		Total		
		7642.53	0.00	7642.53

Calculate Pay Reset Summer

Step Four: Accounting (Labor Distribution)

Enter the index(es) to be charged for GE pay and benefits.

Attachments (If Applicable)

Add attachments here as needed.

When you click **Attach**, select **New File** to upload a document or **Existing File** to attach a file you have access to that is stored in OnBase.

Attachments (If Applicable) (0)

Attach

Step Five: Submission Information

Submitter Name, **Email Address**, and **Date Submitted** are auto populated.

Step Five: Submission Information

Please enter any clarifying remarks in the **Submitter Remarks** box and click **Submit**. The **Departmental Representative** for the ePRF.

Submitter Name	Email Address	Submission Date
		03/24/2023

Submitter Remarks (Remarks will not appear on the NOA.)

Enter clarifying remarks in **Submitter Remarks**.

Note: It's helpful to include information when making complex revisions or terminating an appointment. However, it's important not to include details relating to protected leave or sensitive student information.

Departmental Contacts

- Enter the email address of the GE's **Supervisor**. If unavailable, use the Department Head's email.
- The **Representative Name** field is optional. The name provided in this field will appear on the Notice of Appointment (NOA). If left blank, the Submitter's name will appear on the NOA.

Note: Neither of these entries change the "Departmental Approver" for the GE-PRF.

Departmental Contacts

Enter the supervisor's UO email below and press "Tab" to auto-populate the Supervisor Name field. If unavailable, use Unit Department Head's email.

Supervisor Email Address *

Supervisor Name *

Representative Name

Representative name is for NOA purposes only.

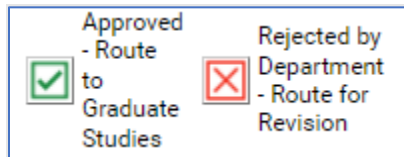
Click **Submit** to route the GE-PRF to the Department Approver.

Submit

Department Approval

Once a GE-PRF is submitted, the department approver(s) will be sent an email from **DuckDocs** (duckdocs@uoregon.edu) with the subject line: **DuckDocs GE PRF: Department Approval Needed**.

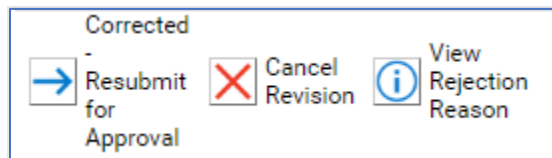
A link to the GE-PRF will be included in the message. Once you have reviewed the GE-PRF information for accuracy, you can choose to either click **Approved – Route to Grad Studies** or **Rejected – Route to Submission Revision**. If you are rejecting, please enter an explanation, which will be included in the email notification to the submitter and may be viewable by Graduate Studies.



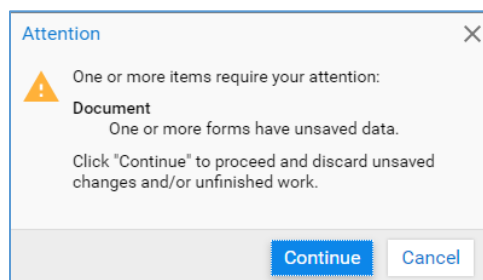
Submission Revision

When an item is sent back to you for revision, you will be sent an email from **DuckDocs** (duckdocs@uoregon.edu) with the subject line: **DuckDocs GE PRF: Revision Needed**.

A link to the document will be included in the message. Review the reason it was sent back (you can view this in the email or by clicking **View Rejection Reason** in DuckDocs), make any necessary adjustments to the form and click **Save**. You can then choose to either click **Corrected – Resubmit for Approval** to route it to your Department Approver or **Cancel Revision** (this will move the item to the Canceled queue and end processing).



If you are presented with the following message, it means that changes were made to the form, but the form was not saved. Click **Cancel** to return to the form and scroll down and click **Save**. To navigate away without saving changes, click Continue.




If you have questions after reading the explanation, please follow up with the commenter directly -- do not reply to the email.

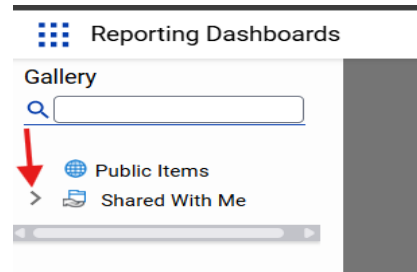
Viewing PRFs & Status Check

Viewing a GE PRF

You may check the status of a particular GE-PRF by using the **Document Retrieval** function and searching **Graduate Employee PRF – BA**. You may enter the GE’s UO ID or search by any of the form fields listed under “Search Type.” The **Document Search Results** window will display a list of GE-PRFs submitted for this student. Each item will include the GE-PRF creation date and the current status.

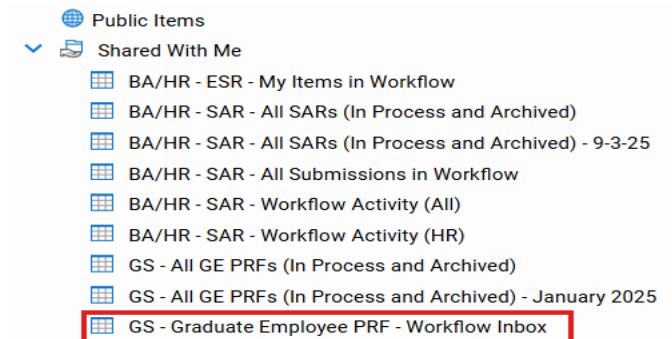
Multiple GE-PRFs

You may use the **Reporting** tool in OnBase to access a list of all items currently in the PRF Workflow by clicking the menu icon in the upper left corner  then **Gallery** under **Reporting Dashboards**. Click on the arrow next to **Shared With Me** to see the list of reports available to you.



Options:

- **GS – Graduate Employee PRF – Workflow Inbox** will display all GE-PRFs that are currently in the active workflow or were completed within the last 90 days.
- **GE – All GE PRFs (In Process and Archived)** will display all GE-PRFs in the system—active and archived.



Tips for Using the Report

- You may **Sort** each column by clicking the column header.
- You may **Filter** by first right-clicking on the column header and choosing Filter Row, then entering your search term in the applicable columns and clicking enter.
- **Document Date** is when the GE PRF was first created in DuckDocs.
- **Content ID** is the unique ID of the document. If you ever need to refer to an in-process PRF, for instance, if you need to make a revision and want to note it in the Submitter Remarks, you can refer to it by this number.
- **Entry Time** is the date when the GE PRF entered the queue listed in the **Queue Name** column.
- **Queue Name** shows the status of the GE PRF.
- You may **Export** the filtered report data by clicking the Export Data button at the top right.

Appendix A: Breakdown of Purpose Types

Create New Appointment

Purpose Type	Purpose Description	Examples
Hire a New Graduate Employee	Create an appointment for a student who has never had a GE appointment	<ol style="list-style-type: none"> Incoming new graduate student Current graduate student who has never held a GE position
Additional Appointment	Create an additional GE appointment in the same term another GE appointment exists. This means there are two GE appointments concurrently in a term.	<ol style="list-style-type: none"> GE has a .25 teaching appointment, and the department wants to hire same GE for a .24 research appointment GE has an existing .40 appointment in their home department. Another department wants to hire the GE for .09.
Reappointment	Create a GE appointment for a student that has previously held a GE appointment.	<ol style="list-style-type: none"> Student had a GE appointment in previous year and will be hired again (for any type of GE position)
Other	COLA or One-time payment for an existing GE	<ol style="list-style-type: none"> COLA payments to GEs working in CERN One-time payments require HR approval in advance. The Student Employee Exception Request Form should be submitted and the approval email should be attached to the GE-PRF.

Revise Existing Appointment

This purpose should be selected when you are revising a GE-PRF that has already been submitted. Select all changes that apply and explain the changes in the remark's sections.

Purpose Type	Purpose Description	Examples
Level Change	GE's level changed	<ol style="list-style-type: none"> GE advanced to candidacy in fall term and needs to be promoted to level III effective winter term but was originally hired at level II Unit forgot to promote GE to level II last term and needs to submit a correction
FTE Change	GE's FTE is increased or decreased Note: Do NOT use this option to terminate an appointment by setting the FTE to zero. A termination GE-PRF is required to remove an appointment.	<ol style="list-style-type: none"> Department increases GE workload which results in an FTE increase Department changes the GE's workload such that fewer hours will be worked, resulting in an FTE decrease. If the FTE/workload decrease was not requested or agreed to be the GE, the unit should consult with Graduate Studies before reducing the FTE
Job Location Change	GE's job location change	If the GE's work location is moving to another city, state, or country, submit a Location Change so we can apply the appropriate taxes and deductions
Position Change	Changing an existing GE appointment from one position type to another type within a term (Research/Teaching/Admin) Note: Do NOT use this option to change hiring units. If a GE is switching from a Teaching position with Unit A to a Research position with Unit B, a termination GE-PRF should be submitted by Unit A and a new appointment GE-PRF should be submitted by Unit B. Ideally, the termination and hire GE-PRFs are submitted the same day.	A GE has a teaching appointment for fall but the unit is changing it to a research appointment. This option allows you to change the position from BUOG9T to BUOG9R <ul style="list-style-type: none"> After selecting this button, the form will prompt you to enter the old and new positions This is <i>not</i> a reappointment. This is a change to an already-existing appointment

Labor Distribution Change	Update labor distribution of an existing appointment	Department decides to pay GE from a different index than what was listed on the original GE-PRF. The effective date of the labor distribution change doesn't have to match the appointment date. For complex changes, you can enter "See Remarks" in the index section and explain the labor distribution changes in the Remarks section.
GE Non-academic Leave Pending	<p>Use this option to notify Graduate Studies and Payroll that an employment leave claim is forthcoming.</p> <p>Note: Do NOT include any protected leave details or sensitive student information on the GE-PRF.</p>	GE has notified the unit that they will be requesting employment leave.

Terminate Appointment

A termination GE-PRF is required to end/cancel a GE appointment. This is **not** automatically done for students who have graduated or requested academic leave.

- You will need to enter the last day worked.
- It is helpful to include a brief explanation in the Remarks section. For example: "GE resigned on xx/xx/xxxx" or "Terminating TA position in BIO because GE is being hired as RA in ION."
- If you are submitting a termination that will affect the current pay period, please email Payroll (payroll@uoregon.edu) and Graduate Studies (graduatestudies@uoregon.edu) so we can prioritize processing and avoid overpayment.

Appendix B: GE Levels

Level	Support Documents Required
Level I: Regularly enrolled graduate students admitted to a graduate degree program or doctoral students who are not eligible for a GE II or GE III appointment.	None
Level II: Students qualify for Level II under one of three conditions: <ul style="list-style-type: none"> a) Master’s degree in the same or cognate field b) Successful completion of a qualifying examination toward a doctoral degree c) Completion of 45 credit hours toward a doctoral degree and written recommendation of the head of major department 	<ul style="list-style-type: none"> a) In the comments section of the GE-PRF, the submitter must provide the institution name and date of conferral of where the Master’s degree was earned b) Statement from department head confirming that the student has completed the qualifying exam (upload as an attachment with the GE-PRF) c) Statement from department head confirming completion of 45 credit hours and recommendation to promote (upload as an attachment with the GE-PRF)
Level III: Regularly enrolled doctoral students who have advanced to candidacy *Do not submit a level change GE-PRF until Graduate Studies has confirmed advancement* <i>Level promotions are effective at the beginning of the term immediately following that during which the criteria for advancement were met.</i>	None –Graduate Studies will verify the advancement to candidacy.

Appendix C: Appointment Dates

Contract Term	Standard Appointment Dates
Fall only	September 16 – December 15
Winter only	December 16 – March 15
Spring only	March 16 – June 15
Fall, Winter, Spring	September 16 – June 15
Fall, Winter	September 16 – March 15
Winter, Spring	December 16 – June 15
Summer	June 16 – Sept 15 June 16 – July 15 (Summer Teaching) June 16 – August 15 (Summer Teaching) July 16 – Sept 15 (Summer Teaching) July 16 – August 15 (Summer Teaching) August 16 – Sept 15 (Summer Teaching)

Important Notes:

- If hiring for Fall & Spring, but not Winter, submit two GRE-PRFs – one for Fall and one for Spring.
- If position type changes between terms, submit separate ePRFs to reflect correct position type for each term
- If non-standard appointment dates are needed, consult with Graduate Studies.