Printing Position Data/Appointment Forms

Procedure

1. Open your browser and navigate to: www.northwestern.edu/myhr. Click the “myHR Login” button to log in with your Northwestern-assigned NetID and Password.

2. Click the campus button in the top right corner > Click “Classic Home.”

3. Navigate to:

WORKFORCE ADMINISTRATION > JOB INFORMATION > REPORTS > POSITION/APPOINTMENT BY EMPL
(to print forms by EmplID)

- or -

ORGANIZATIONAL DEVELOPMENT > POSITION MANAGEMENT > POSITION REPORTS > POS/APPT FORM BY POSITION
(to print forms by Position Number)

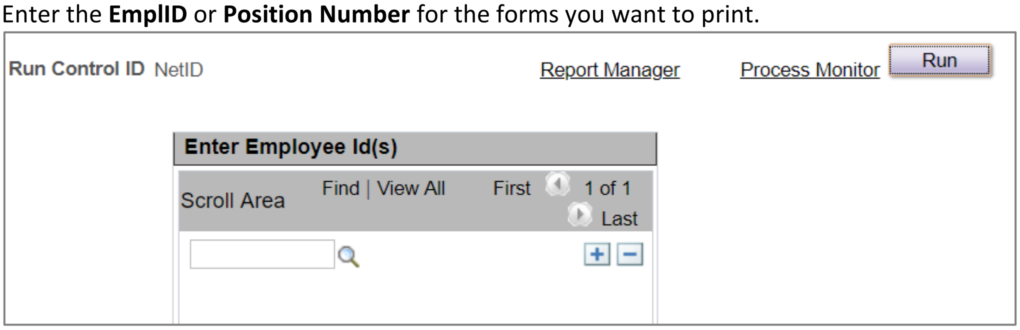
4. If this is your first time creating a form, or if you cannot remember your previous Run Control ID:

- Click **ADD NEW VALUE** tab
- Enter a **RUN CONTROL ID** that will be easy to remember next time (e.g. your NetID like abc1234-hr)
- Click **ADD**

If you remember your previous Run Control ID:

- Enter your **RUN CONTROL ID**
- Click **SEARCH**

5. Enter the **EmplID** or **Position Number** for the forms you want to print.

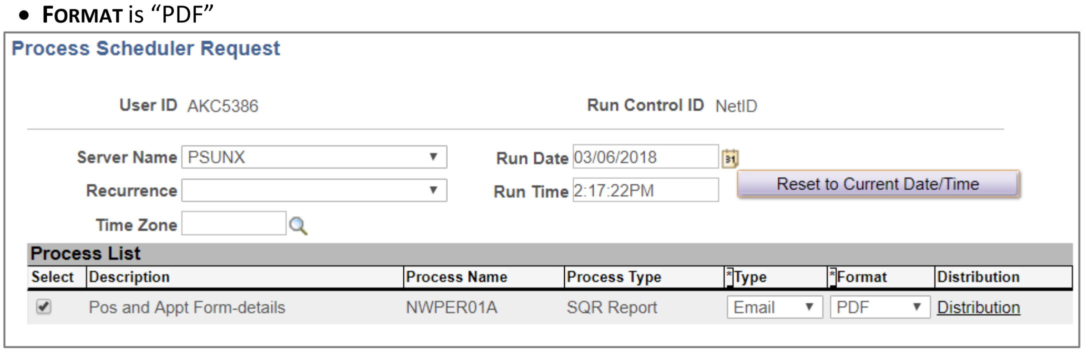


Note: Click the **[+]** button to print forms for multiple employees/positions at the same time.

6. Click **RUN**.

7. Set and/or confirm the following options:

- **SERVER NAME** is “PSUNX”
- **TYPE** is “Email”
- **FORMAT** is “PDF”



Note: After setting these options for the first time, they will default in the next time you log in with the same Run Control ID in Step #4.

8.	Click **OK**. Your forms will run in the background and will be emailed to your Northwestern email address as PDF attachements.
9.	If **TYPE** in Step#7 was "Document" the document must be downloaded from myHR. Click the **Refresh** button on the upper right of the screen until your reports **Run Status** is *Success* and the **Distribution Status** is *Posted*.
10.	Click **Details** next to your report.
11.	Click **View Log/Trace.**
12.	The report will be the .pdf file. Click the file name. *Note:* If the document does not download please try holding down the control key (Ctrl) and clicking again. If it still does not download be sure pop-up blockers are turned off. If you need assistance reference the Turn Off Pop-up Blocker document.

Before Completing Position Data/Appointment Forms

- **Does your change require a Position Data/Appointment Form?**
  Remember that funding can be updated online by Deployed Funding users and Reports To approvers may be updated online by any myHR Admin user. Graduate student appointments funded by TGS stipends will be managed by TGS, and temporary employees are not managed on these forms.

- **Are you *updating* a Position and/or Appointment record that already exists in myHR?**
  When updating information, you must pre-print an existing version of the form using the instructions in the next section. You may use a blank side of the form when creating a new position or a new appointment.

- **Have you confirmed the employee's University ID number and existing status?**
  Remember to review the Northwestern Job Summary page (Main Menu > Workforce Administration > Job Information > Review Job Information > Northwestern Job Summary) to determine if the employee has an existing University ID number; whether it is a hire, rehire, or reinstatement; and other important background information.

- **Do you know which Action/Reason Code(s) to use?**
  Refer to the Action/Reason Code Matrix to determine the appropriate code(s). Remember, you may use a code on one or both sides of the form, and you may use more than one code on the Appointment side of the form. If you are unsure of which codes to use, contact the Payroll Office, Office of the Provost, Office for Research, or your school's Faculty Affairs, Administration, or Finance Office for assistance.

Rules for Submitting Forms

- ✓ You must pre-print forms when updating existing Position or Appointment data.
- ✓ Both the Position Data and the Appointment sides of the form are always required, even if a change is being made to only one side.
- ✓ Do not scratch out, white out, or black out the old information. Simply cross out the existing data and hand-write your change next to it.
- ✓ If you are making a correction to a previous form that you submitted, indicate so in the margin of the form. Feel free to write in any additional notes or comments.
- ✓ Route the form though the employee's home department and school for approval.
- ✓ Forms that impact an employee's pay must arrive fully approved by the Cutoff Deadline. Forms that do not arrive on time will be processed on the next regular pay date for the employee; any difference in pay will be paid retroactively.

Additional Assistance

For more help with forms, including how to complete certain transactions or what Action/Reason Codes to use:

- Review the Action/Reason Code Matrix and other myHR Administration resources available online at: http://www.northwestern.edu/hr/managers-administrators/myhr-administration/.

myHR offers numerous regular and on-demand training classes for a variety of administration components and procedures. Currently scheduled courses can be found by logging into myHR with your NetID and password. Select the "Learning" tile to review your training history and search for courses. All myHR course numbers begin with "HRS" (Human Resources Systems).

- For questions about trainings and security access, contact Anna Chapman the myHR Training Specialist at anna.chapman@northwestern.edu.
- For help with the myHR system beyond the initial training classes, contact: myHR Help 847-467-4800 / myHRhelp@northwestern.edu between Monday-Friday, 8:30am-5:00pm.