

Step	Action
1	<p>**Only the KAP_AGY_T_E_MAINTAINER and KAP_CEN_T_E_MAINTAINER roles have access to perform this function.</p> <p>Navigation: Travel and Expenses>Manage Employee Information>Update Profile</p>
2	<p>On the search page, click on the Add New Value tab.</p>
3	<p>Enter a unique "Employee ID" This number must be a unique value, statewide. Suggested schema for this number is: First 5 digits agency number followed by a 5 digit sequential number Example 1730000001 ***Do not use an alpha character to start this number</p> <div data-bbox="349 835 971 1255" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Employee Profile (Edit)</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <hr/> <p>EmpID: <input type="text" value="1730000001"/></p> <p><input type="button" value="Add"/></p> <p> Find an Existing Value Add a New Value </p> </div> <p>Click Add</p>

Step	Action
4	<p data-bbox="349 136 730 168">Fill out all highlighted fields</p> <div data-bbox="349 168 1461 1312"> <p data-bbox="365 178 1323 220"> Employee Data Organizational Data User Defaults Bank Accounts Transportation Information </p> <hr/> <p data-bbox="365 283 568 304">Employee Information</p> <p data-bbox="365 315 1396 346">*Last Name: <input type="text" value="Doe"/> *First Name: <input type="text" value="John"/></p> <p data-bbox="365 357 1209 388">Telephone: <input type="text" value="785/555-5555"/> Employee Base: <input type="radio"/> Home</p> <p data-bbox="365 399 1209 430">*Personnel Status: <input type="text" value="Non-Employee"/> <input type="button" value="v"/> <input checked="" type="radio"/> Office</p> <p data-bbox="933 430 1299 493">Payments Sent To: <input checked="" type="radio"/> Home Address <input type="radio"/> Mailing Address</p> <p data-bbox="682 451 917 514" style="border: 1px solid red; background-color: #f8d7da; padding: 2px;">Choose Non-Employee</p> <hr/> <p data-bbox="365 504 503 525">Home Address</p> <p data-bbox="365 535 755 577">Country: <input type="text" value="USA"/> <input type="button" value="m"/> United States</p> <p data-bbox="365 577 901 619">Address 1: <input type="text" value="1234 SW Main Street"/></p> <p data-bbox="365 619 901 661">Address 2: <input type="text"/></p> <p data-bbox="365 661 901 703">Address 3: <input type="text"/></p> <p data-bbox="365 703 803 745">City: <input type="text" value="Topeka"/></p> <p data-bbox="365 745 1128 787">County: <input type="text" value="Shawnee"/> Postal: <input type="text" value="66616"/></p> <p data-bbox="365 787 722 829">State: <input type="text" value="KS"/> <input type="button" value="m"/> Kansas</p> <hr/> <p data-bbox="365 829 519 861">Mailing Address</p> <p data-bbox="365 871 755 913">Country: <input type="text" value="USA"/> <input type="button" value="m"/> United States</p> <p data-bbox="365 913 901 955">Address 1: <input type="text"/></p> <p data-bbox="365 955 901 997">Address 2: <input type="text"/></p> <p data-bbox="365 997 901 1039">Address 3: <input type="text"/></p> <p data-bbox="365 1081 803 1123">City: <input type="text"/></p> <p data-bbox="365 1123 1128 1165">County: <input type="text"/> Postal: <input type="text"/></p> <p data-bbox="365 1165 641 1207">State: <input type="text"/> <input type="button" value="m"/></p> <p data-bbox="365 1239 552 1281"> <input type="button" value="Save"/> <input type="button" value="Notify"/> </p> <p data-bbox="357 1291 1209 1312"> Employee Data Organizational Data User Defaults Bank Accounts Transportation Information </p> </div>

Step

Action

5

Click on the organizational data tab and fill out all highlighted fields. The Fund, Bud Unit and Program fields are optional.

Employee Data | **Organizational Data** | User Defaults | Bank Accounts | Transportation Information

Expenses Processing Data Find | View All First 1 of 1 Last

Valid for Expenses: No Default Profile
Reason for Status: Ignore Authorized Amounts

HR Information				Supervisor Information			
Employee Status:	Active			*ID:	K00000000001		
Hire Date:	07/14/2010			Name:	Approver, John		
*GL Unit:	17300		Dept of Social and Rehab Svcs				
*Department:	1730000000		Executive				
Hours Per Period:	<input checked="" type="checkbox"/> Use Business Unit Default						
Job Title:							
Official Station:							

Default ChartField Values									
*GL Unit	Fund	Bud Unit	Program	Svc Loc	Aqy Use	ChartField 2	Fund Affil	Affiliate	*Dept
17300	1000	0013	01031						1730000000

Cash Advance Level

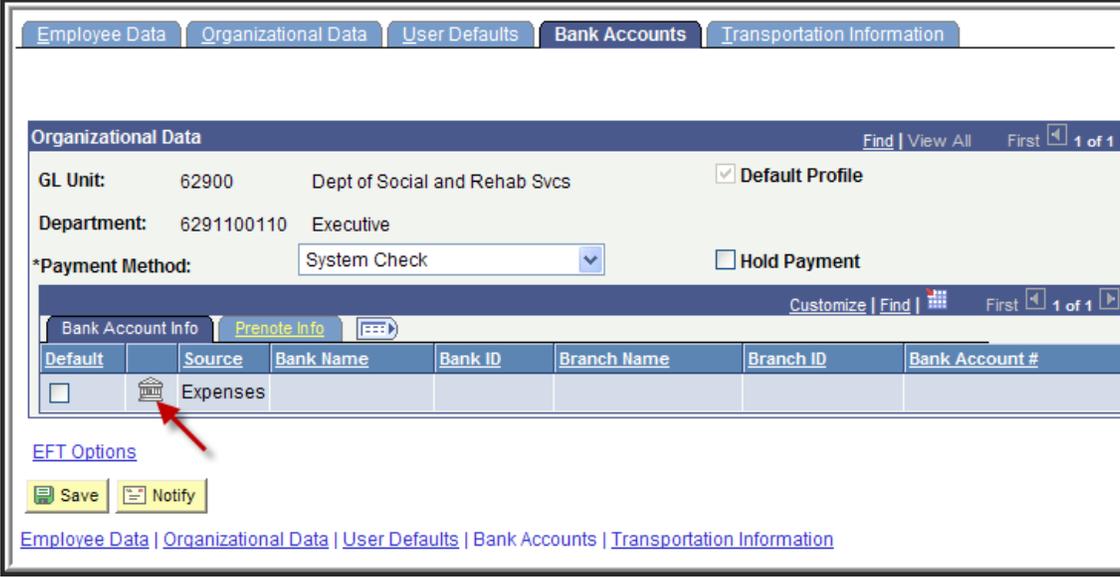
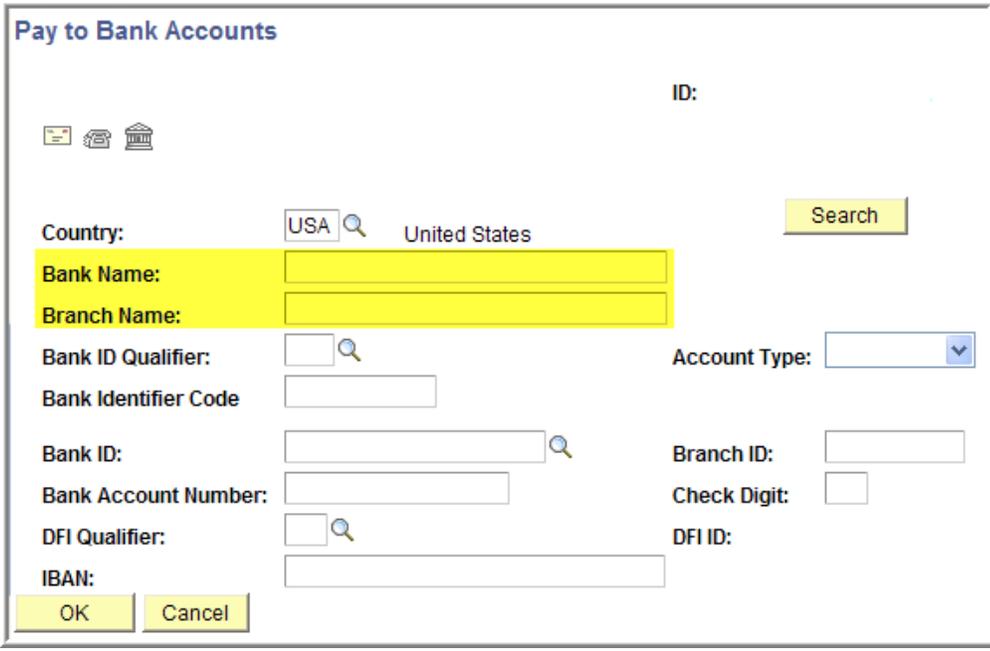
Business Unit 1,000.00 USD
 Specific Amount
 None

Expense Role

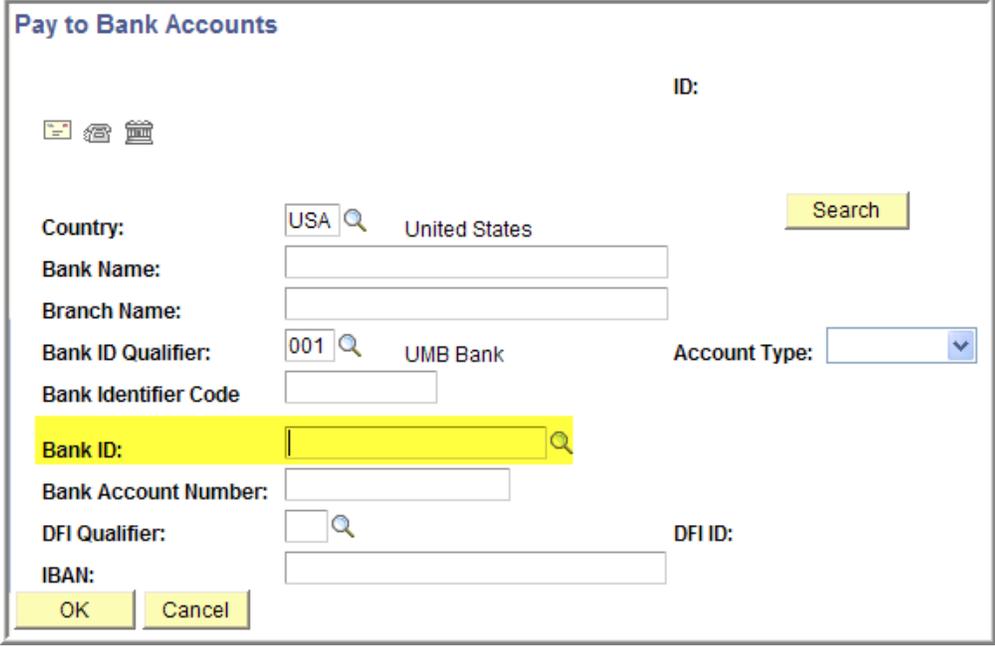
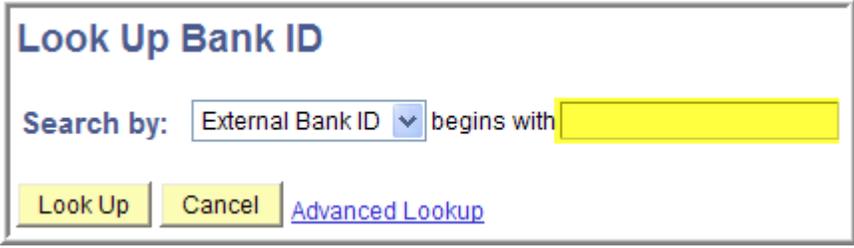
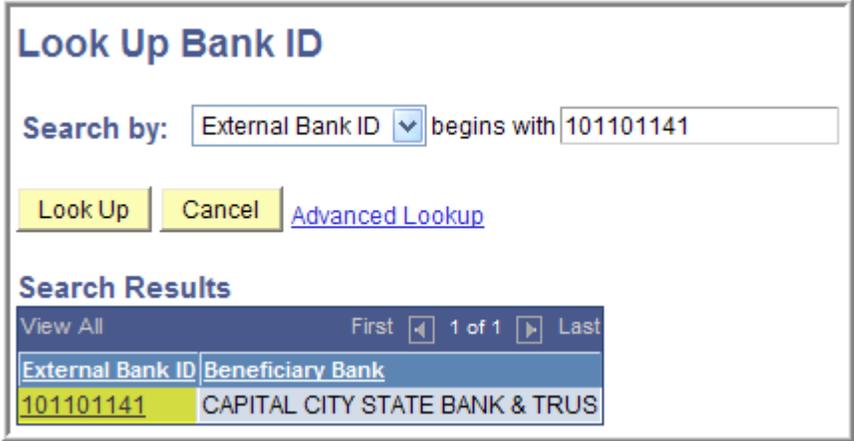
"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role:

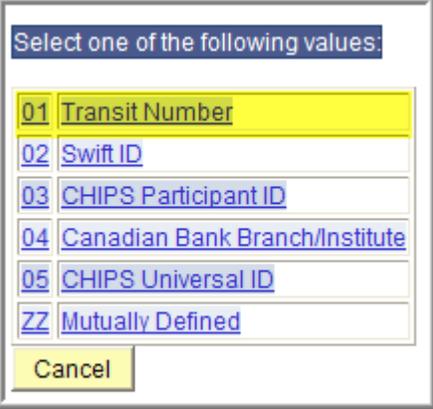
[Employee Data](#) | [Organizational Data](#) | [User Defaults](#) | [Bank Accounts](#) | [Transportation Information](#)

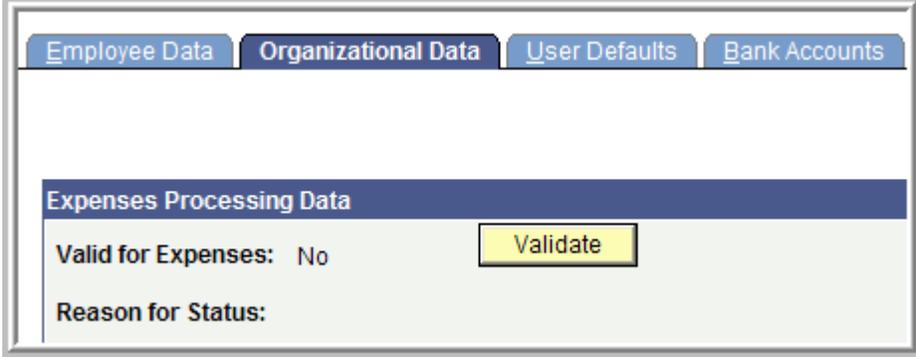
Step	Action
6	<p>Click on the bank accounts tab, and click on the Bank Account icon.</p> 
7	<p>Enter the Bank Name and Branch Name if known (these fields are not required)</p> 

Step	Action				
8	<p>Select the look up next to the Bank ID Qualifier field</p> <div data-bbox="349 170 1344 814" style="border: 1px solid gray; padding: 5px;"> <p>Pay to Bank Accounts</p> <p style="text-align: right;">ID: <input type="text"/></p> <p></p> <p>Country: <input type="text" value="USA"/>  United States <input type="button" value="Search"/></p> <p>Bank Name: <input type="text"/></p> <p>Branch Name: <input type="text"/></p> <p>Bank ID Qualifier: <input type="text"/>  Account Type: <input type="text"/></p> <p>Bank Identifier Code: <input type="text"/></p> <p>Bank ID: <input type="text"/>  Branch ID: <input type="text"/></p> <p>Bank Account Number: <input type="text"/> Check Digit: <input type="text"/></p> <p>DFI Qualifier: <input type="text"/>  DFI ID: <input type="text"/></p> <p>IBAN: <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>				
9	<p>Select the value "001".</p> <div data-bbox="349 898 1157 1333" style="border: 1px solid gray; padding: 5px;"> <p>Look Up Bank ID Qualifier</p> <p>Search by: Bank ID Qualifier begins with <input type="text"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Cancel"/> Advanced Lookup</p> <p>Search Results</p> <p>View All First  1 of 1  Last</p> <table border="1" data-bbox="365 1249 803 1323"> <thead> <tr> <th>Bank ID Qualifier</th> <th>Short Description</th> </tr> </thead> <tbody> <tr> <td>001</td> <td>UMB Bank</td> </tr> </tbody> </table> </div>	Bank ID Qualifier	Short Description	001	UMB Bank
Bank ID Qualifier	Short Description				
001	UMB Bank				

Step	Action
10	<p>Select the look up next to the Bank ID field</p> 
11	<p>Enter the new routing number and click the Look Up button.</p> 
12	<p>Click on the desired routing number in the External Bank Id column.</p> 

Step	Action
13	<p>Enter the employee's Bank Account number in the Bank Account Number field.</p> <div data-bbox="349 174 1339 825" style="border: 1px solid black; padding: 5px;"> <p>Pay to Bank Accounts</p> <p style="text-align: right;">ID:</p> <p></p> <p>Country: <input type="text" value="USA"/>  United States <input type="button" value="Search"/></p> <p>Bank Name: <input type="text"/></p> <p>Branch Name: <input type="text"/></p> <p>Bank ID Qualifier: <input type="text" value="001"/>  UMB Bank Account Type: <input type="text" value=""/></p> <p>Bank Identifier Code: <input type="text"/></p> <p>Bank ID: <input type="text" value="101101141"/> </p> <p>Bank Account Number: <input type="text"/></p> <p>DFI Qualifier: <input type="text"/>  DFI ID: 101101141</p> <p>IBAN: <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Main Content"/></p> </div>
14	<p>Select the look up next to the DFI Qualifier field</p> <div data-bbox="349 905 1339 1556" style="border: 1px solid black; padding: 5px;"> <p>Pay to Bank Accounts</p> <p style="text-align: right;">ID:</p> <p></p> <p>Country: <input type="text" value="USA"/>  United States <input type="button" value="Search"/></p> <p>Bank Name: <input type="text"/></p> <p>Branch Name: <input type="text"/></p> <p>Bank ID Qualifier: <input type="text" value="001"/>  UMB Bank Account Type: <input type="text" value=""/></p> <p>Bank Identifier Code: <input type="text"/></p> <p>Bank ID: <input type="text" value="101101141"/> </p> <p>Bank Account Number: <input type="text" value="9988776655"/></p> <p>DFI Qualifier: <input type="text"/> </p> <p>IBAN: <input type="text"/> DFI ID: 101101141</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>

Step	Action
15	<p>Always select the value "01"</p>  <p>Select one of the following values:</p> <ul style="list-style-type: none"> 01 Transit Number 02 Swift ID 03 CHIPS Participant ID 04 Canadian Bank Branch/Institute 05 CHIPS Universal ID ZZ Mutually Defined <p>Cancel</p>
16	<p>Click the drop down box next to the Account Type field and select the appropriate type of account. (Check Acct and Savings will be the most commonly used account types)</p>  <p>Click the OK Button</p>
17	<p>Verify that the Payment Method is "Automated Clearing House". Make sure the Default check box is selected for the account.</p> 
18	Click the Save button.

Step	Action
19	<p data-bbox="347 136 1393 205">Once the profile has saved, click on the Organizational Data tab. A yellow "Validate" button will appear.</p> <div data-bbox="347 212 1263 569" style="border: 1px solid gray; padding: 5px;">  <p data-bbox="386 247 1235 277">Employee Data Organizational Data User Defaults Bank Accounts</p> <hr/> <p data-bbox="386 394 1235 424">Expenses Processing Data</p> <p data-bbox="399 451 984 480">Valid for Expenses: No Validate</p> <p data-bbox="399 510 613 539">Reason for Status:</p> </div> <p data-bbox="347 575 1403 644">Click this button to Validate the employee profile. Verify that the "Valid for Expenses" field is Yes.</p> <div data-bbox="347 651 1263 982" style="border: 1px solid gray; padding: 5px;">  <p data-bbox="386 667 1235 697">Employee Data Organizational Data User Defaults Bank Accounts</p> <hr/> <p data-bbox="386 814 1235 844">Expenses Processing Data</p> <p data-bbox="399 871 683 900">Valid for Expenses: Yes</p> <p data-bbox="399 930 932 959">Reason for Status: Passed All Validation Edits</p> </div>
20	Task Complete