

State of Kansas Update Profile – Non-Employee Statewide Management, Accounting, and Reporting Tool



Action
**Only the KAP_AGY_T_E_MAINTAINER and KAP_CEN_T_E_MAINTAINER roles have access to perform this function. Navigation: Travel and Expenses>Manage Employee Information>Update Profile
On the search page, click on the Add New Value tab. 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 #***Do not use an alpha character to start this number Employee Profile (Edit) Find an Existing Value Add Find an Existing Value Add Click Add

Step	Action
4	Fill out all highlighted fields
	Employee Data Organizational Data User Defaults Bank Accounts Transportation Information
	Alast Name: Doe First Name: John
	Telephone: 785/555-5555 Employee Base: O Home
	*Personnel Status: Non-Employee
	Chasse Nep Employee
	Home Address
	Country: USA Q United States
	Address 1: 1234 SW Main Street
	Address 2:
	Address 3:
	Citv: Topeka
	County: Shawnee Postal: 66616
	State: KS Q Kansas
	Mailing Address
	Country: USA Q United States
	Address 1
	Address 2
	Address 3:
	Address 5.
	Citra
	City:
	County: Postal:
	State:
	Save Notify
	Employee Data Organizational Data User Defaults Bank Accounts Transportation Information

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 <u>Find</u> View All First 1 of 1 Last
	Valid for Expenses: No
	Reason for Status:
	HR Information Supervisor Information
	Hire Date: 07/14/2010 3
	*GL Unit: 17300 Q Dept of Social and Rehab Svcs
	*Department: 173000000 Q. Executive
	Hours Per Period: 🗹 Use Business Unit Default
	Job Title:
	Default ChartField Values
	<u>*GL Unit Fund Bud Unit Program Svc Loc Agy Use ChartField 2 Fund Affil Affiliate *Dept</u>
	17300 Q 1000 Q 0013 Q 01031 Q Q Q Q Q Q 1730000000 Q
	Cash Advance Level
	Business Unit 1,000.00 USD
	O Specific Amount
	Expense Role
	matter how many jobs they hold within the company."
	Expense Processing Role:
	Save Notify
	Employee Data Organizational Data User Defaults Bank Accounts Transportation Information
1	

Step	Action	
6	Click on the bank accounts tab, and click on t	he Bank Account icon.
	Employee Data Organizational Data User Defaults Bank Acc	ounts
	Organizational Data	<u>Find</u> View All First 🔳 1 of 1
	GL Unit: 62900 Dept of Social and Rehab Svcs	✓ Default Profile
	Department: 6291100110 Executive	
	*Payment Method: System Check	Hold Payment
	Bank Account Info Brancts Info	Customize Find 🛗 First 🕙 1 of 1 🕨 I
	Data Account and reside mode reside mode Default Source Bank Name Bank ID Branch Na	ame Branch ID Bank Account #
	Expenses	
	EFT Options	
	Save Notify	
	Employee Data Organizational Data User Defaults Bank Accounts Tra	nsportation Information
7	Enter the Bank Name and Branch Name if known required)	own (these fields are not
	Pay to Bank Accounts	
		ID:
	Country: USA Q United States	Search
	Bank Name:	
	Branch Name:	
	Bank ID Qualifier:	Account Type:
	Bank Identifier Code	
	Bank ID:	Branch ID:
	Bank Account Number:	Check Digit:
	DFI Qualifier:	DFI ID:
	IBAN:	
	OK Cancel	

Step	Action	
8	Select the look up next to the Bank ID Qualifie	er field
	Pay to Bank Accounts	
		ID:
		Search
	Country: USA C United States	
	Bank Name:	
	Branch Name:	
	Bank ID Qualifier:	Account Type:
	Bank Identifier Code	
	Bank ID:	Branch ID:
	Bank Account Number:	Check Digit:
	DFI Qualifier:	DFI ID:
	IBAN:	
	OK Cancel	
	.2	
9	Select the value "001".	
	Look Up Bank ID Qualifier	
	Search by: Bank ID Qualifier begins with	
	Look Up Cancel Advanced Lookup	
	Search Results	
	View All First ┥ 1 of 1 🕞 Last	
	Bank ID Qualifier Short Description	
	UMB Bank	

Step	Action	
10	Select the look up next to the Bank ID field	
	Pay to Bank Accounts	
	ID:	
	Country: USA United States Search	
	Bank Name:	
	Branch Name:	
	Bank ID Qualifier: UMB Bank Account Type:	
	Bank Identifier Code	
	Bank ID:	
	Bank Account Number:	
	DFI Qualifier: DFI ID:	
	IBAN:	
11	Enter the new routing number and click the Look IIn button	
11		
	LOOK UP Bank ID	
	Search by: External Bank ID w begins with	
	Search by.	
	Look Up Cancel Advanced Lookup	
12	Click on the desired routing number in the External Bank Id column.	
	Look Up Bank ID	
	LOOK OP BallK ID	
	Search by: External Bank ID 🖌 begins with 101101141	
	Look Up Cancel Advanced Lookup	
	Search Results	
	View All First 🗃 1 of 1 🕞 Last	
	External Bank ID Beneficiary Bank	
	101101141 CAPITAL CITY STATE BANK & TRUS	

Step		Action	
13	Enter the employee	's Bank Account number in	the Bank Account Number field.
	Pay to Bank Accounts	5	
			ID:
			Search
	Country:	USA United States	
	Bank Name:		
	Branch Name:	001	
	Bank ID Qualifier:	UMB Bank	Account Type:
	Bank Identifier Code		
	Bank ID:	101101141	
	Bank Account Number:		
	DFI Qualifier:	Q	DFI ID: 101101141
	IBAN:		Main Content
	OK Cancel		
14	Select the look up r	next to the DFI Qualifier fiel	d
	Pay to Bank Accounts	5	
			ID:
	Country	USA Q United States	Search
	Bank Name:		
	Branch Name:		
	Bank ID Qualifier:	001 Q UMB Bank	Account Type:
	Bank Identifier Code		
	Bank ID:	101101141	
	Bank Account Number:	9988776655	
	DFI Qualifier:	Q	DFI ID: 101101141
	IBAN:		
	OK Cancel		
	,		

Step	Action
15	Always select the value "01" Select one of the following values: 01 Transit Number 02 Swift ID 03 CHIPS Participant ID 04 Canadian Bank Branch/Institute 05 CHIPS Universal ID ZZ Mutually Defined Cancel
16	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) Bond Bus Acct Charges Check Acct Current Dem Dep Lf Ins-Net Life Ins Mutual Ret Acct Ret It-DDA Ret It-DDA Ret It-Sav S&B Acct Savings Settlement Stock Time Dep Trust Fund Click the OK Button
17	Verify that the Payment Method is "Automated Clearing House". Make sure the Default check box is selected for the account.
18	Click the Save button.

Step	Action
19	Once the profile has saved, click on the Organizational Data tab. A yellow "Validate" button will appear.
	Employee Data Organizational Data User Defaults Bank Accounts
	Valid for Expenses: No Validate
	Reason for status.
	Click this button to Validate the employee profile. Verify that the "Valid for Expenses" field is Yes.
	Employee Data Organizational Data User Defaults Bank Accounts
	Expenses Processing Data
	Valid for Expenses: Yes
	Reason for Status: Passed All Validation Edits
20	Task Complete