

## **Electronic Approval – Contractor (ERCNTR)**

**There are two types of Affiliates/Contractors that can be entered in Banner HR:**

1. ERAFFL- The affiliate has an indirect association with an organization in the University's chart of accounts (ex. Institute of Human Studies).
2. ERCNTR- The contractor works for an organization contracted by George Mason University (ex. Sodexo).

**The following actions are required to establish a contractor in Banner HR:**

1. Create a Person Record in SPAIDEN.
2. Create the employee record and job record using NOAEPAF.

This Electronic Personnel Action Form (EPAF) type is used when you are hiring a contractor employee.

**NOTE:** Sensitive information, such as names, G numbers, and Social Security numbers, is not included in this manual. Please keep in mind that in the live Banner Application all G numbers consist of the letter G followed by 8 digits. If you have any questions about the format of any fields in this manual, please contact the Office of HR & Payroll at (703) 993-2600.

## Navigation Shortcuts




Function	Pull-down Menu Option	Shortcut	Toolbar Icon
Save or Commit	File/Save	F10	1
Rollback	File/Rollback	Shift + F7	2
Select	File/Select	Shift + F3	3
Insert Record	Record/Insert	F6	4
Delete Record	Record/Remove	Shift + F6	5
Previous Record	Record/Previous	Up Arrow	6
Next Record	Record/Next	Down Arrow	7
Previous Block	Block/Previous	Ctrl + Page Up	8
Next Block	Block/Next	Ctrl + Page Down	9
Enter Query	Query/Enter	F7	10
Execute Query	Query/Execute	F8	11
Cancel Query	Query/Cancel	Ctrl + Q	12
Print	File/Print	Shift + F8	13
Exit	File/Exit	Ctrl + Q	14
Next Field	Field/Next	Tab	none
Previous Field	Field/Previous	Shift + Tab	none
List of Values	Help/List	F9	none
Show Keys	Show Shortcut Keys	Ctrl + F1	none

## Step by Step Instructions

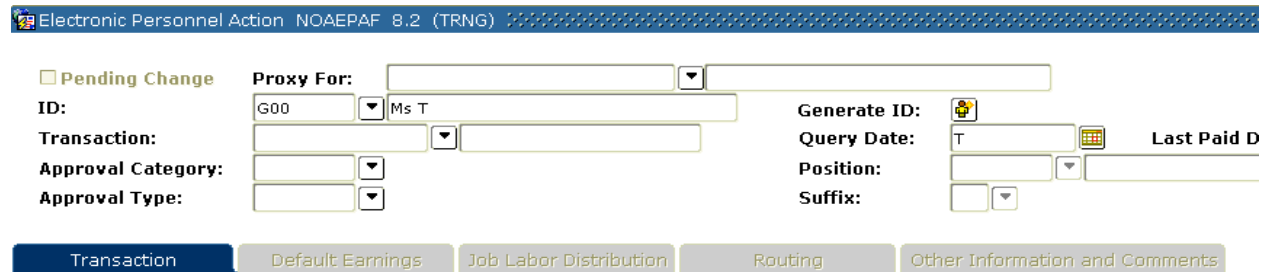
Before beginning with this manual, be sure that the contractor in question has a SPAIDEN record. Refer to the “Entering a New Employee into SPAIDEN” manual for assistance.

1. Type **NOAEPAF** in text box and click **Enter** to begin the EPAF process.



Go To... NOAEPAF Welcome,  
My Banner  
Banner

2. This screen auto-populates with the last person for which you were making entries, so be sure to verify you want to enter an assignment for this person. Enter the correct G number in the ID field.



Electronic Personnel Action NOAEPAF 8.2 (TRNG)

Pending Change Proxy For: [ ]

ID: G00 Ms T Generate ID: [ ]

Transaction: [ ] Query Date: T Last Paid D [ ]

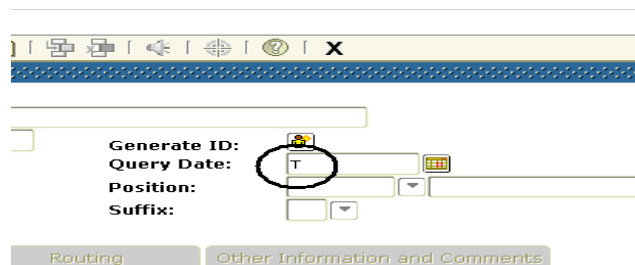
Approval Category: [ ] Position: [ ]

Approval Type: [ ] Suffix: [ ]

Transaction Default Earnings Job Labor Distribution Routing Other Information and Comments

3. Enter the current date in the *Query Date* field and press **Tab**.

(Shortcuts- if you type the letter **T** and press **tab**, today’s date will be entered.)



Generate ID: [ ]

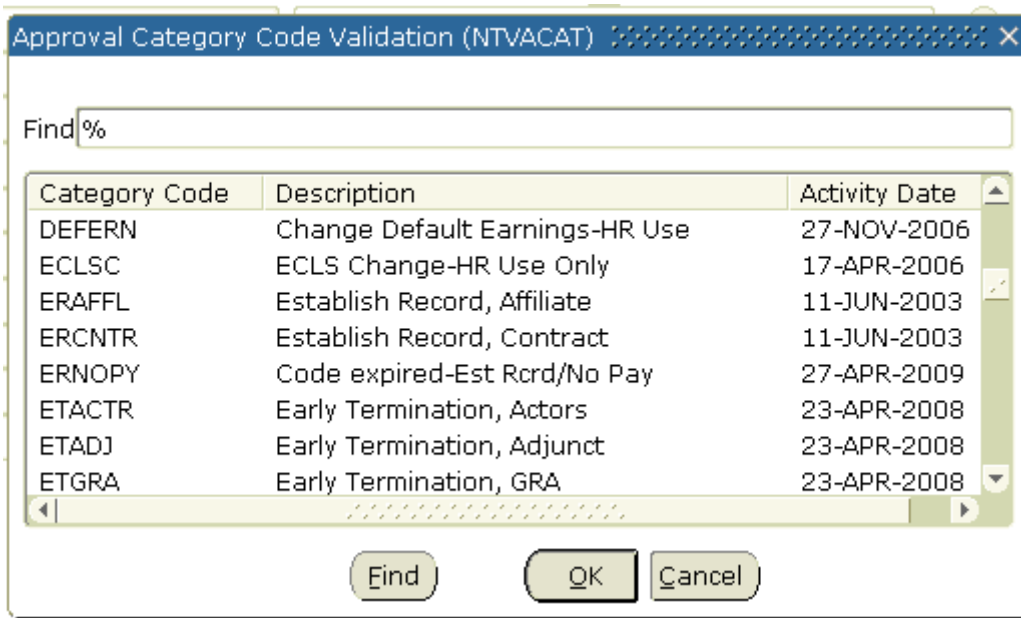
Query Date: T

Position: [ ]

Suffix: [ ]

Routing Other Information and Comments

4. Enter the appropriate *Approval Category*; select ERCNTR for a contractor who physically works at Mason but is paid by another company. By clicking the [ ] icon next to *Approval Category* field, the list of acceptable values is displayed. Notice that the description of the action is listed after the text field.



5. The **Approval Type** is auto-populated according to the **Approval Category** selected.

Pending Change    Proxy For: \_\_\_\_\_

ID: G00461047    Mr Matthew J Rice    Generate ID:

Transaction: \_\_\_\_\_    Query Date: 22-JUL-2008

Approval Category: ERCNTR    Establish Record, Contract    Position: \_\_\_\_\_

Approval Type: **CRNOPC**    Create no pay record, contr    Suffix: \_\_\_\_\_

6. Press both CONTROL and PAGE DOWN or click **NEXT BLOCK icon** to access the next fields. For original hires, there should be **no** data in the Current Value field. If information appears under Current Value, **stop** and begin again as a current hire. Some information in the **New Value** fields will auto-populate. Most of this information will not need to be changed.

Pending Change    Proxy For: \_\_\_\_\_

ID: G00461047    Mr Matthew J Rice    Generate ID:

Transaction: \_\_\_\_\_    Query Date: 22-JUL-2008    Last Paid Date: \_\_\_\_\_


Approval Category: ERCNTR    Establish Record, Contract    Position: \_\_\_\_\_

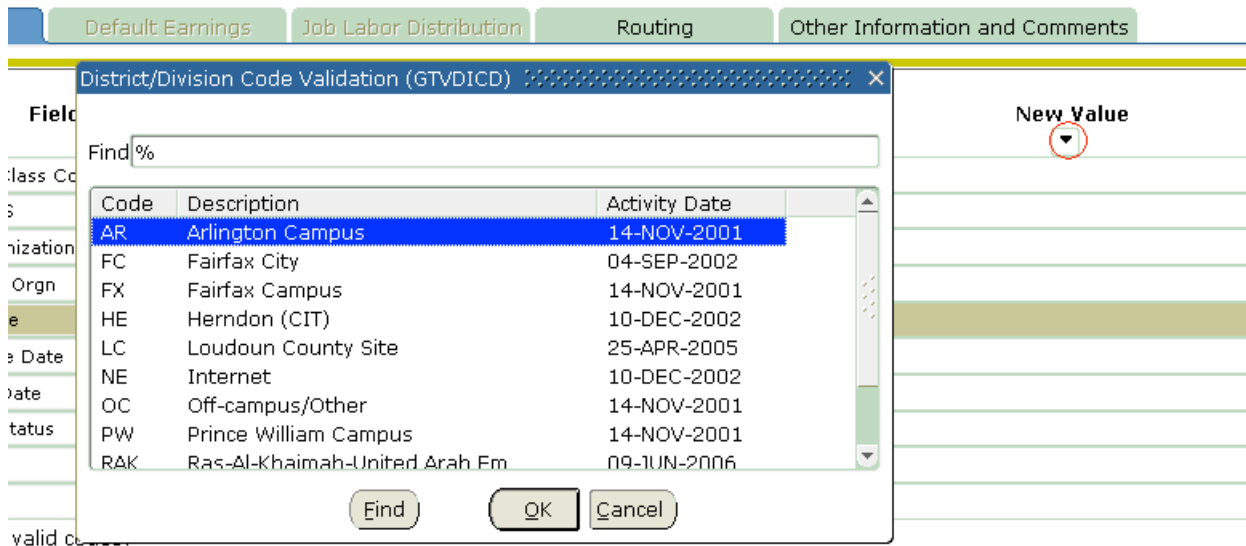
Approval Type: CRNOPC    Create no pay record, contr    Suffix: \_\_\_\_\_

Transaction    Default Earnings    Job Labor Distribution    Routing    Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input checked="" type="checkbox"/>	Employee Class Code		NP
<input type="checkbox"/>	Home COAS		1
<input type="checkbox"/>	Home Organization		
<input type="checkbox"/>	Distribution Orgn		6902
<input type="checkbox"/>	District Code		FX
<input type="checkbox"/>	Current Hire Date		
<input type="checkbox"/>	Last Work Date		-
<input type="checkbox"/>	Employee Status		A
<input type="checkbox"/>			
<input type="checkbox"/>			


Press LIST for valid codes.

- A. **Employee Class Code** - Will automatically populate with **NP**. It cannot be changed.
- B. **Home COAS** (chart of accounts) - Will auto-populate with **1**. It cannot be changed.
- C. **Home Organization** – Enter the organization number that corresponds to the organization that is sponsoring this person. This is a required field.
- D. **Distribution Organization** – Will automatically populate with **6902**. It cannot be changed.
- E. **District Code** – Enter the campus on which the employee will be located. The field will default to **FX** (Fairfax) but it can be changed. This is a required field.
- F. To change the field, use the down arrow to highlight the field and select the  under “New Value”. A box will pop up with a list of Mason locations. Select the appropriate location and double click.



- G. **Current Hire Date** – Enter the date the employee is to begin the affiliation with George Mason University. This is a required field. (Shortcut- you can type T and press tab for today’s date)
- H. **Last Day Worked** – Enter the date the affiliation with George Mason University is to end. This is a required field and should only be active for (1) year; Human Resources can extend if necessary.
- I. **Employee Status** – This will auto-populate with A (active). It cannot be changed.

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		NP
<input type="checkbox"/>	Home COAS		1
<input type="checkbox"/>	Home Organization		431001
<input type="checkbox"/>	Distribution Orgn		6902
<input type="checkbox"/>	District Code		FX
<input type="checkbox"/>	Current Hire Date		27-APR-2006

- 7. Click the **F10** button or the **Save**  icon and then select **Other Information and Comments** located in the **Options** menu or click on the **Other Information and Comments** tab.



Transaction | Default Earnings | Job Labor Distribution | **Routing** | Other Information and Comments

Originator ID:

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
REQAPP	40			Approval	In Queue	
APPLY	90			Apply	In Queue	

A. There are two levels required for all Electronic Approvals - **Required Approver** (level REQAPP) and **Applier** (level APPLY). Enter the usernames for the **Required approver(s)** and **Applier**.

B. The **Required Approver** is generally the departmental approver.

Transaction | Default Earnings | Job Labor Distribution | **Routing** | Other Information and Comments

Originator ID:

Active User ID's for Level Code

Find: %

Level Code	Level	User ID	Name
REQAPP	40		
APPLY	90		

User Id	Name
C	C
C	C
C	C
C	C
C	C
D	D


Find OK Cancel

C. The **Applier** is the person who will finalize the hire in the database. This is **always** an HR Assistant.

D. If the transaction needs to be approved by another unit, it will automatically route to that unit (i.e. OSP, Provost Office, etc.).

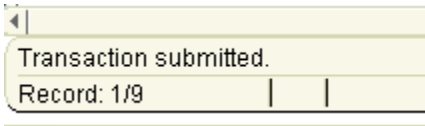
**WARNING:** Once you submit this transaction you **cannot** delete or void it. You will need to contact the appropriate approver or the HR Assistant to have the transaction voided. If you want to delete or void it prior to submission, select **Delete PAF** from the **Options** menu (you must first return to the main body of the EPAF by selecting “transaction”).

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
REQAPP	40	S	Ms S	Approval	In Queue	
APPLY	90	R	Mr R	Apply	In Queue	

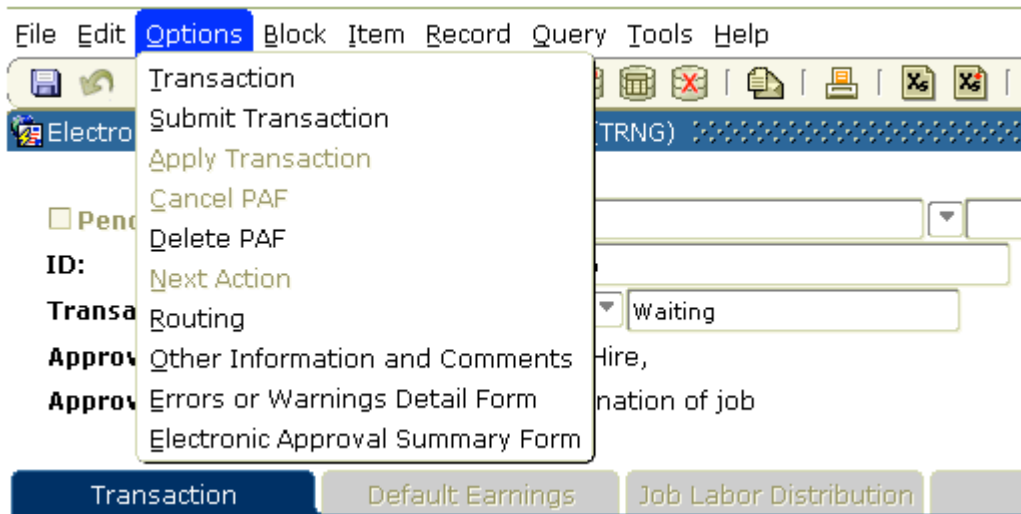
12. Once you have entered routing information, click the **F10** button or the **Save**  icon.

13. To submit the transaction, select **Submit Transaction** from the **Options** menu.

A. If the submission is complete, the bottom left corner of the screen will say “Transaction submitted.”

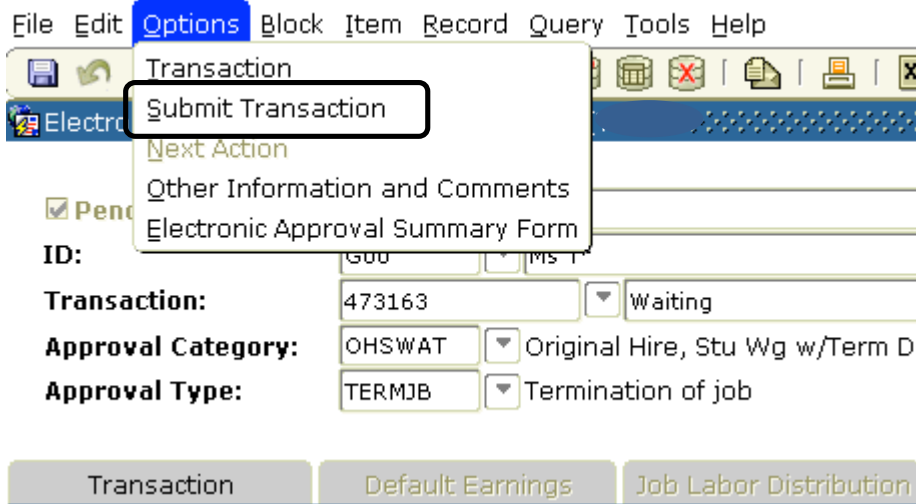


- B. If transaction is not completed, the bottom left corner might note that there are errors or it might take you directly to the “Electronic Approvals Error Message,” **NOIEMSG** page. A transaction with warnings can be submitted (you will need to select “Complete Submit” from the **Options** menu) but be sure the warnings will not negatively impact the transaction. You cannot continue until any errors are corrected. To view any errors, select “Errors or Warnings Detail Form” from the **Options** menu. Control-Page Down to view the errors/warnings.



Approval Type	Error Type	Errors and Warnings Information
GENJBW	ERROR	*ERROR* This employee already has a primary job.

- C. Select **Options** from the toolbar and then **Submit Transaction**. If additional errors or warnings exist you will get another screen that outlines the changes you need to make.



- D. Once the screen says “Transaction Submitted,” the EPAF is on its way to the approver. Note that the Transaction Status has changed from Waiting to Pending.