

## Original Hire – ADJUNCT (OHADJ)

**The following actions are required to hire an employee in Banner HR:**

1. Create a Person Record in SPAIDEN.
2. Check NBI JLST to see if the assignment will be an original or current hire and check the previous suffixes, if applicable.
3. Create an employee record and job record using NOAEPAF.

This Electronic Personnel Action Form (EPAF) type is used when you are hiring an adjunct faculty member. Adjuncts normally begin on August 25<sup>th</sup> for the Fall semester, January 25<sup>th</sup> for the Spring semester, and varies in the summer. Please refer to Summer Term Office for summer adjunct dates.

**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

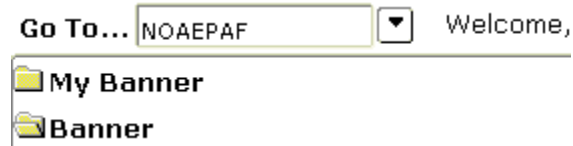


Function	Pull-down Menu Option	Shortcut	Toolbar Icon
Save or Commit	File/Save	F10	1
Rollback	File/Rollback	Shift + F7	2
Select	File/Select	Shift + F3	3
Insert Record	Record/Insert	F6	4
Delete Record	Record/Remove	Shift + F6	5
Previous Record	Record/Previous	Up Arrow	6
Next Record	Record/Next	Down Arrow	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 employee 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.

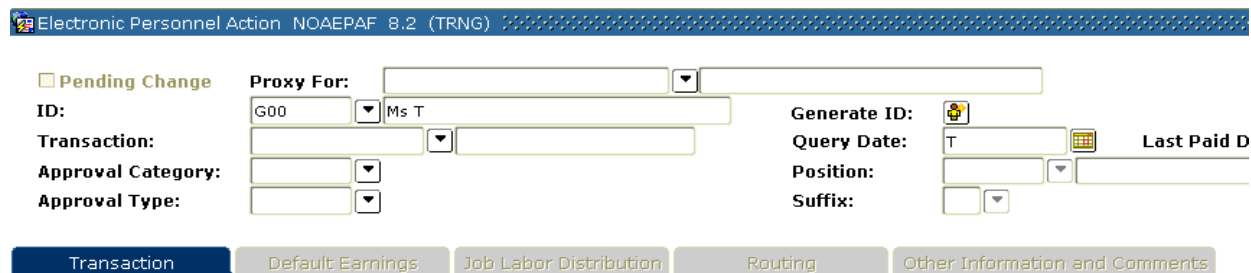


Go To... NOAEPAF Welcome,

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 [ ]

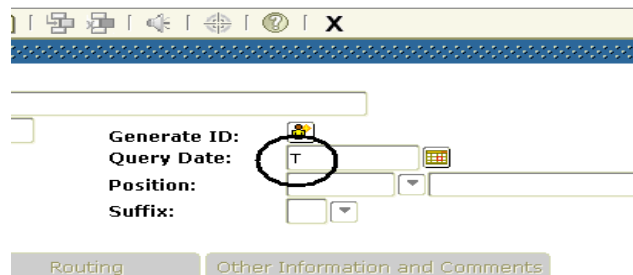
Approval Category: [ ] Position: [ ]

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 OHADJ for Original Hire, Adjunct. By double-clicking the  icon next to *Approval Category* field, the list of acceptable values is displayed. For example, if we are hiring an employee who has not worked for GMU before, the appropriate *Approval Category* is **OH%** for Original Hire, followed by their employee type, ADJ, (CH% for current hire). Notice that the description of the action is listed after the text field.

NOTE: **OHGTA** is the category for graduate teaching assistants and graduate lecturers. If you use this category, be sure to use the correct position prefix (GA or GL). **OHGRA** is the category for graduate research assistants. If the employee is a graduate student at Mason, please refer to the Graduate Assistant training manual.

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

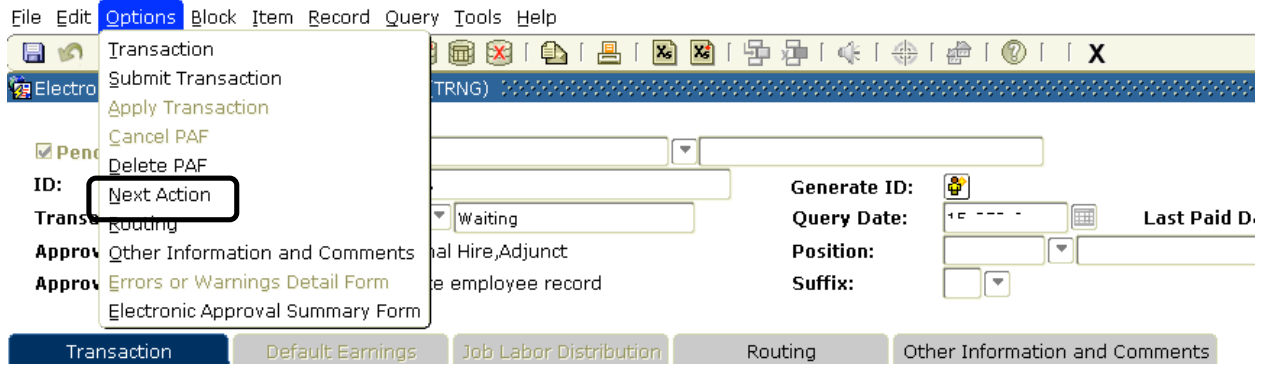
6. Press both CONTROL and PAGE DOWN or click the  **NEXT BLOCK icon** to access the next fields. For original hires, there should be **no** data in the Current Value fields. If information appears under Current Value, **stop** and begin again as a current hire. Some information in the **New Value** fields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

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		AD
<input type="checkbox"/>	Home COAS		1
<input type="checkbox"/>	Home Organization		
<input type="checkbox"/>	Distribution Orgn		
<input type="checkbox"/>	District Code		FX
<input type="checkbox"/>	Current Hire Date		
<input type="checkbox"/>	I9 Form Indicator		R
<input type="checkbox"/>	I9 Date		
<input type="checkbox"/>	I9 Expiration Date		

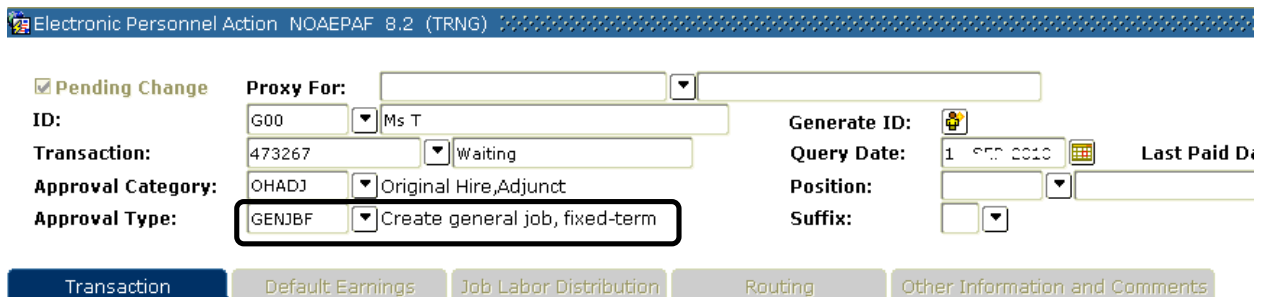
- A. **Employee Class Code** – This will automatically populate with **AD**. It cannot be changed.
- B. **Home COAS** (chart of accounts) – This will auto-populate. It cannot be changed.
- C. **Home Organization** – Enter the organization number that corresponds to the origination number that is paying this person. This is a required field.
- D. **Distribution Organization** – Enter the same value as for the **Home Organization**. It is a required field.
- 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.
  - a. To change, 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.



- To access the next field, select **Next Action** from the **Options** menu.

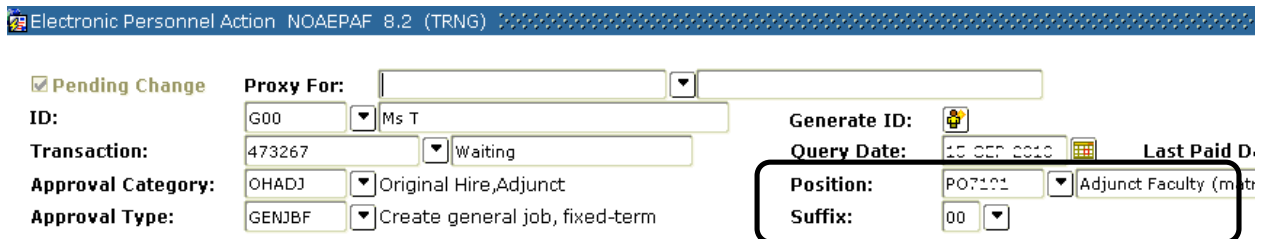


- You can now begin to create a job record. You will notice that the *Approval Type* has changed to **GENJBF** (create general job record for a fixed term).



- The next step is to enter the position number. You can reach this field by using the TAB key. The prefix varies from FV, PO, SF, and SP. **If you do not know what position number to use, go to the “Pooled Position Lookup Form” under Employee Self-Service in PatriotWeb.**

- Press **TAB**, and then enter the *Suffix* (the suffix will be 00 for new employees).



- Press Control-Page Down to reach the next field.

**WARNING:** Once you press **Control+ Page Down** to reach the next fields, the position number cannot be changed. To delete or void the transaction at this time, go to **OPTIONS** then select Delete PAF.

- At this stage, a transaction number will auto-populate. Write down the transaction number! If you take a break and return to the EPAF later, the quickest way to find the EPAF is by searching on the **NOAEPAF** form with the number. The **Transaction Status** indicates where the transaction is in the process. A transaction that has not been submitted will have a status of **Waiting**.

Pending Change    Proxy For:

ID:  Ms T    Generate ID:

Transaction:  473267    Query Date: 15 SEP 2010    Last Paid D

Approval Category: OHADJ    Original Hire,Adjunct    Position: P07101    Adjunct Faculty (mat

Approval Type: GENJBF    Create general job, fixed-term    Suffix: 00

Transaction    Default Earnings    Job Labor Distribution    Routing    Other Information and Comments


14. You will now be able to view additional fields. Some information in the **New Value** fields will auto-populate. Most of this information will not need to be changed. If information appears under the **Current Value** fields, **stop**. This means the position number and suffix combination have been used before. This is no longer an Original Hire EPAF. Delete the transaction and use the Current Hire training manual to hire this employee.

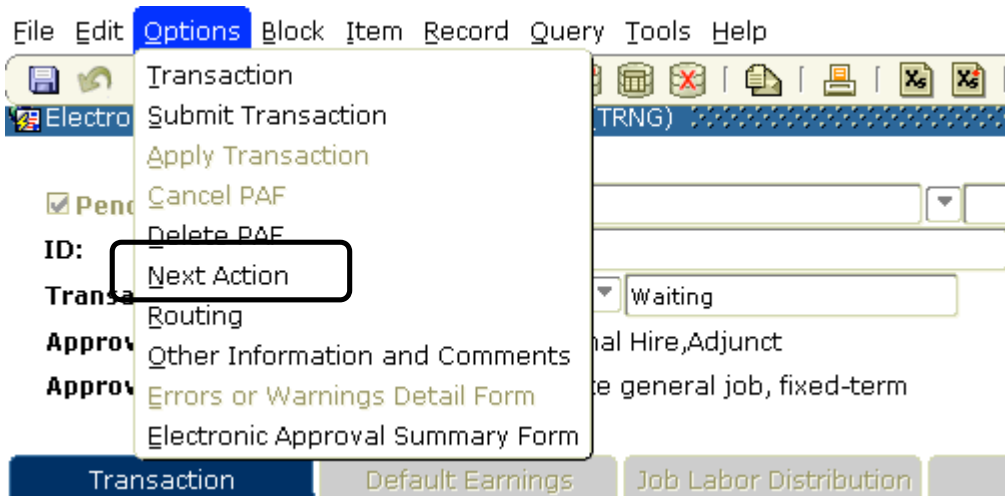
Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		
<input type="checkbox"/>	Jobs Effective Date		25-AUG-2010
<input type="checkbox"/>	Personnel Date		
<input type="checkbox"/>	Job Begin Date		25-AUG-2010
<input type="checkbox"/>	Hours per Day		8
<input type="checkbox"/>	Annual Salary		2500
<input type="checkbox"/>	Hours per Pay		86.67
<input type="checkbox"/>	Title		HR/HR Training 101 Section 1
<input type="checkbox"/>	FTE		.25
<input type="checkbox"/>	Appointment Percent		100

- A. **Employee Class Code** – This will automatically populate with **AD** after the EPAF has been approved. It cannot be changed.
- B. **Jobs Effective Date** – The date entered must be the first day of the pay period. The date entered must be the 10<sup>th</sup> or the 25<sup>th</sup> of the month. Most adjunct positions begin August 25<sup>th</sup> in the fall and January 25<sup>th</sup> in the spring. Enter the date that is closest to when the employee is to begin working. This is a required field. Contact an HR Assistant if you are not sure what date to use.
- C. Leave **Personnel Date** blank. Once it is applied to the database, the field will auto-populate with the employee’s start date.
- D. **Jobs Begin Date** – Must be the same as the job effective date, either the 10<sup>th</sup> or the 25<sup>th</sup>
- E. **Hours per Day** – This will automatically populate with **8**. It cannot be changed.
- F. **Annual Salary**- Enter the total amount to be paid for the assignment. Each class should be a different EPAF. This is a required field.
- G. **Hours per Pay** – **86.67** will auto-populate and cannot be changed.
- H. **Title** – For adjuncts, enter the class title, course number, and course section. Entering a title is strongly recommended. Please note there is a 30 character limit and you should type the title in directly, do not copy and paste from another source.

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Annual Salary		2500
<input type="checkbox"/>	Hours per Pay		86.67
<input type="checkbox"/>	Title		HR/HR Testing 101 Section 1
<input type="checkbox"/>	FTE		.25
<input type="checkbox"/>	Appointment Percent		100
<input type="checkbox"/>	Factor		7
<input type="checkbox"/>	Pays		7
<input type="checkbox"/>	Job Change Reason		NH
<input type="checkbox"/>	Contract Type		P
<input type="checkbox"/>	Salary Encumbrance		

Use the scroll bar to scroll down to additional fields.

- I. **FTE** – This will automatically populate with **.25**. This is the default FTE value for an adjunct. It can be revised as needed with a value greater than 0 and less than 1.
  - J. **Appointment Percent** – This will automatically populate with **100**. It cannot be changed.
  - K. **Factor**- Enter the number of pays for the employee. The default is 7, as there are 7 paydays in either the fall or spring semesters. The start date, pays/factors and end date **must** align for the employee to be paid correctly.
  - L. **Pays**- THIS NUMBER IS ALWAYS THE **SAME AS THE FACTOR** field.
  - M. **Job Change Reason** – This will automatically populate with **NH** (for new hire). It cannot be changed.
  - N. **Contract Type** – This will automatically populate with **P**. It cannot be changed.
  - O. **Salary Encumbrance** – Will automatically populate. It cannot be changed.
15. Once you have entered information in all the required fields on the **GENJBF** page, click the **F10** button or the  icon to save.
  16. To reach the next fields, select **Next Action** from the **Options** menu.



17. Notice that the Approval Type has changed to TERMJB (terminate job record).

Electronic Personnel Action NOAEPAF 8.2 (TRNG)

Pending Change    Proxy For:


ID:  Ms T

Transaction:  Waiting

Approval Category:  Original Hire,Adjunct


Approval Type:  Termination of job

Transaction    Default Earnings    Job Labor Distribution

18. Press CONTROL-PAGE DOWN or click the  **NEXT BLOCK icon** to enter the end date of the assignment.

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date		09-DEC-2010
<input type="checkbox"/>	Job End Date		09-DEC-2010
<input type="checkbox"/>	Job Status		T
<input type="checkbox"/>	Job Change Reason		CA

- A. **Jobs Effective Date** – The date entered must be either the 9<sup>th</sup> or 24<sup>th</sup> of the month. Generally the end dates for adjunct positions are December 9<sup>th</sup> for fall semester and May 9<sup>th</sup> for spring semester. **Be sure that the start date, pays/factor and end date all align.**
- B. **Jobs End Date** – This date **must** match the job effective date. This is a required field.
- C. **Job Status**- This will auto-populate with **T** for termination. It cannot be changed.
- D. **Job Change Reason**- Will auto-populate with **CA** (completion of appointment). It cannot be changed.

19. Once you have entered information in all the required fields on the **TERMJB** page, click the **F10** button or the  icon to save.

20. Next, enter comments by selected **Other Information and Comments** from the **Options** menu or select the Tab labeled **Other Information and Comments**.

File Edit **Options** Block Item Record Query Tools Help

Transaction Submit Transaction Apply Transaction Cancel PAF Delete PAF Next Action Routing

Pending

ID:

Transaction:  Waiting

Approval Category:  Original Hire,Adjunct

Approval Type:  Termination of job

Generate ID:

Query Date: 15 SEP 2010    Last Paid D

Position:  Adjunct Faculty (mat

Suffix:

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


- A. If this position is funded by Sponsored Research, the term length, projected labor amount, and grant number should be entered in the comments field before OSP will approve the EPAF.

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

Created Date:  Submitted Date:  Application Date:   
 Originator ID:  Submitter ID:  Applied to Database:

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Comment:  Date and Time:   
 Made By:

21. Once you have entered information in the **Comment** field, click the **F10** button or the  icon to save.
22. Next click on the **Routing** tab or select **Routing** from the **Options** menu. This is where you will enter the names of the individuals who will approve the EPAF.

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	<input type="text"/>	<input type="text"/>	Approval	In Queue	<input type="text"/>
APPLY	90	<input type="text"/>	<input type="text"/>	Apply	In Queue	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 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 %


User Id	Name
C	C
C	C
C	C
C	C
C	C
n	n

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.).

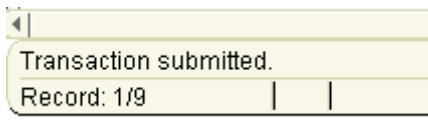
**WARNING:** Once you submit this transaction you *cannot* delete or void it. You will need to contact the appropriate approver or the HR Assistant to have the transaction voided. If you want to delete or void it prior to submission, select **Delete PAF** from the **Options** menu (you must first return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

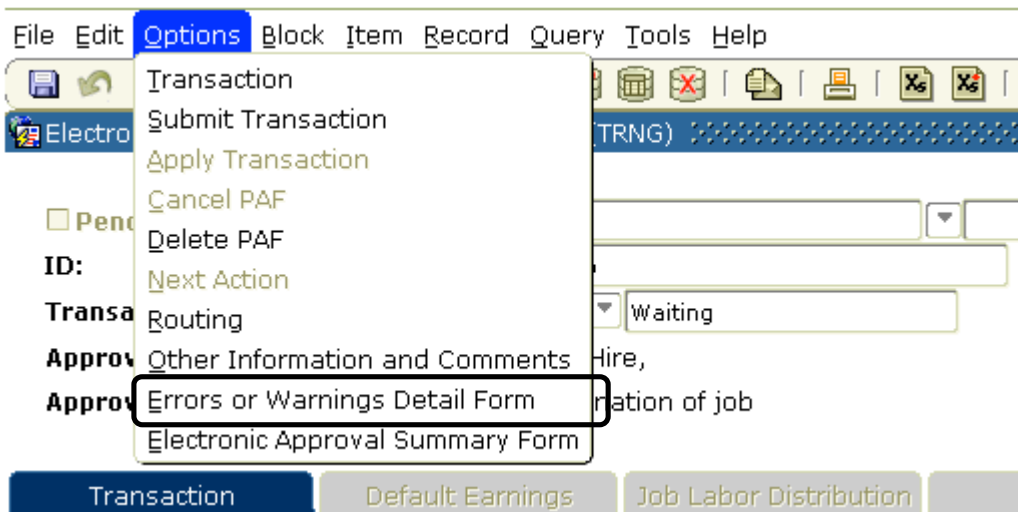
23. Once you have entered routing information, click the **F10** button or the **Save**  icon.



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

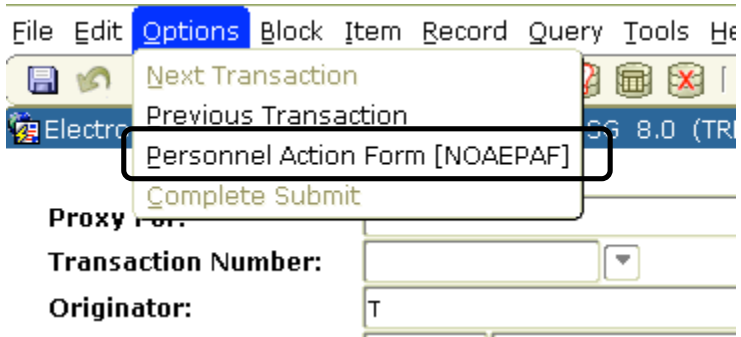
- A. If the submission is complete, the bottom left corner of the screen will say “transaction submitted.”



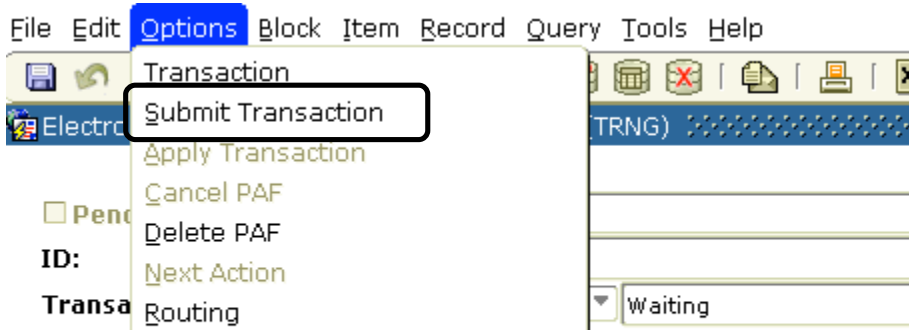
- B. If transaction is not completed, the bottom left corner might note that there are errors or it might take you directly to the “Electronic Approvals Error Message,” **NOIEMSG** page. A transaction with warnings can be submitted (you will need to select “Complete Submit” from the **Options** menu) 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.



- C. If you need to go back and fix an error, select **Options** from the toolbar and then **Personnel Action Form**. If this is not an available option, click the  icon until it is. Continue to resolve all errors and then click **Save** or the  icon.



- D. 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.



- E. 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.

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

**ID:**      G00      Ms T

**Transaction:**      473267      **Pending**

**Approval Category:**      OHADJ      Original Hire,Adjunct

**Approval Type:**      TERMJB      Termination of job