

Original Hire – GRADUATE ASSISTANTS (OHGTA & OHGRA)

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 a graduate assistant. Graduate assistants normally begin on August 25th for the Fall semester, January 25th for the Spring semester, and varies in the summer. Please refer to Summer Term Office for summer graduate assistant 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

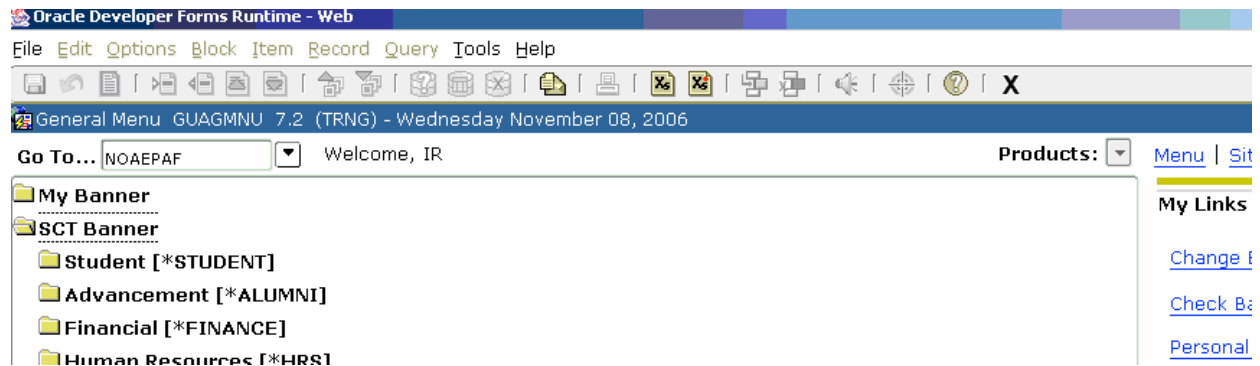


Function	Pull-down Menu Option	Shortcut	Toolbar Icon
Save or Commit	File/Save	F10	1
Rollback	File/Rollback	Shift + F7	2
Select	File/Select	Shift + F3	3
Insert Record	Record/Insert	F6	4
Delete Record	Record/Remove	Shift + F6	5
Previous Record	Record/Previous	Up Arrow	6
Next Record	Record/Next	Down Arrow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

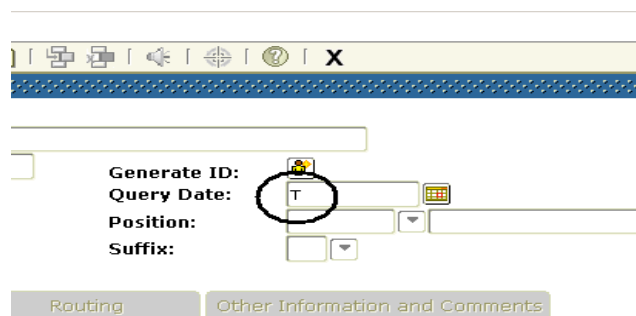
1. Type **NOAEPAF** in text box and click **Enter** to begin the EPAF process.




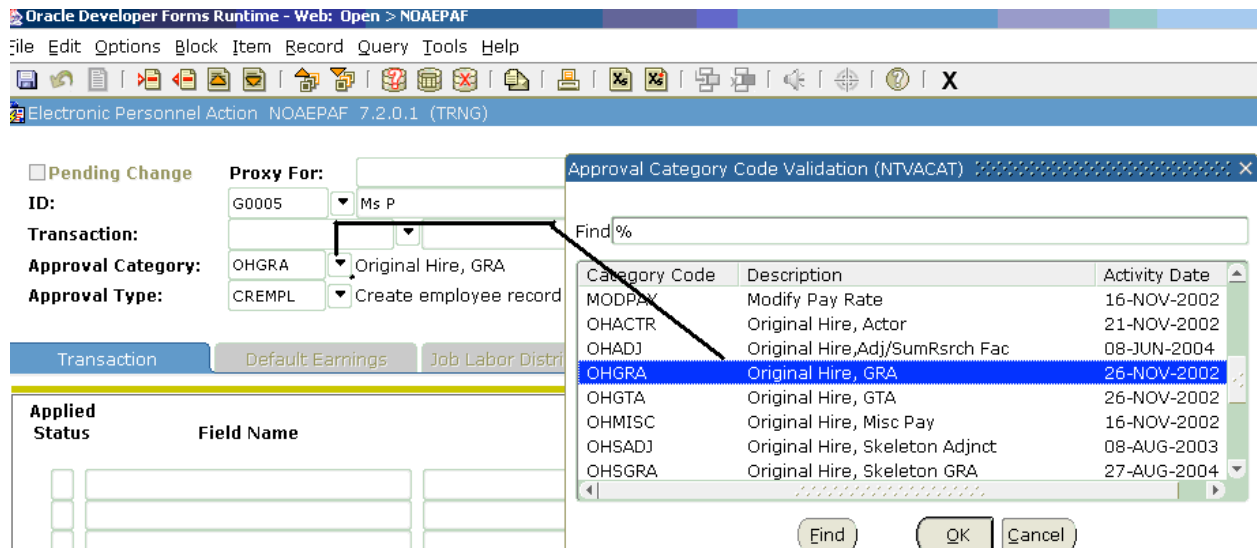
2. This screen auto-populates with the last person you were making entries to, be sure to verify this is the person you want to hire. Enter the correct G number in the ID field.


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. To select another date in the current month you can type the numerical portion followed by pressing enter or tab and the month and year will auto-populate. For example, if it is February and you enter the 23 in the date field and press tab, the field will auto-populate with 23-FEB-2008).



4. Enter the appropriate *Approval Category*; select OHGRA for Original Hire, Graduate Research Assistant. 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, GRA, (CH% for current hire). 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.



- Press both CONTROL and PAGE DOWN or click the  **NEXT BLOCK** icon to access the next fields. For original hires, there should be **no** date 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.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 8.3 (DEVL)

Pending Change

Proxy For:

ID: G00720087 Jane X Doe

Transaction:

Approval Category: OHGRA Original Hire, GRA

Approval Type: CREMPL Create employee record

Generate ID:

Query Date: 11-FEB-2011

Last Paid Date:

Position:

Suffix:


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

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		GR
<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"/>	19 Form Indicator		R
<input type="checkbox"/>	19 Date		
<input type="checkbox"/>	19 Expiration Date		

Press LIST for valid codes.

Approver Action: None

Queue Status:

- A. **Employee Class Code** – This will automatically populate with **GR**. 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.

Applied Status	Field Name	Current Value	New Val
<input type="checkbox"/>	Employee Class Code		WG
<input type="checkbox"/>	Home COAS		1
District/Division Code Validation (GTVDICD) X			
Find %			
Code	Description	Activity Date	
AR	Arlington Campus	14-NOV-2001	
FC	Fairfax City	04-SEP-2002	
FX	Fairfax Campus	14-NOV-2001	
HE	Herndon (CIT)	10-DEC-2002	
LC	Loudoun County Site	25-APR-2005	
NE	Internet	10-DEC-2002	
OC	Off-campus/Other	14-NOV-2001	
PW	Prince William Campus	14-NOV-2001	
RAK	Ras-Al-Khaimah-United Arab Em	09-JUN-2006	
<input type="button" value="Find"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>			
			Queue Status: <input type="text"/>

- F. **Current Hire Date** – Enter the first day of pay period, 10th or 25th.
- G. **I-9 Form Indicator** – This field must be populated with a value to indicate that the employer has received the I-9. The only acceptable values for this field are:
- R (received)** - Indicates that the I-9 was completed **prior** to the employee beginning work and that the employee is either a US Citizen or a Permanent Resident.
 - T (temporary)** - Indicates that the I-9 was completed and certified by OIPS **prior** to the employee beginning work and that the employee is a Non-Immigrant eligible to work in the United States. This is a required field.
- H. **I-9 Date** – Enter the date the I-9 is completed and/or certified by OIPS. This is a required field.
- J. **I-9 Expiration** – enter the date **only if the I-9 field is T** (temporary). If the employee is a US Citizen or Permanent Resident, the I-9 expiration date field should be blank. This field will only be completed if the employee is a Non-Immigrant eligible to work in the United States by OIPS.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 8.3 (DEVL)

Pending Change Proxy For: []

ID: G00720087 Jane X Doe Generate ID: []

Transaction: [] Query Date: 11-FEB-2011 Last Paid Date: []

Approval Category: OHGRA Original Hire, GRA Position: []

Approval Type: CREMPL Create employee record Suffix: []

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

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		GR
<input type="checkbox"/>	Home COAS		1
<input type="checkbox"/>	Home Organization		431001
<input type="checkbox"/>	Distribution Orgn		431001
<input type="checkbox"/>	District Code		FX
<input type="checkbox"/>	Current Hire Date		25-FEB-2011
<input type="checkbox"/>	I9 Form Indicator		R
<input type="checkbox"/>	I9 Date		25-FEB-2011
<input type="checkbox"/>	I9 Expiration Date		
<input type="checkbox"/>			

Approver Action: None Queue Status: []

- Click the **F10** button or the icon to save. You should get a message that 10 records have been applied and saved (Banner counts each line as a record.)

FRM-40400: Transaction complete: 10 records applied and saved.
Record: 1/9

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

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Transaction

Submit Transaction

Apply Transaction

Cancel PAF

Delete PAF

Next Action

Routing

Other Information and Comments

Errors or Warnings Detail Form

Electronic Approval Summary Form

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

- 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).

10. The next step is to enter the position number. You can reach this field by using the TAB key. The prefix for all Graduate Research Assistant positions is **GR**. **If you don't know what position number to use, go to the Pooled Position lookup form on the Banner Administrative homepage at <https://patriotweb.gmu.edu/admin/>. Enter the organization number funding the position, and the correct position number will be displayed.**

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

12. 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.

13. 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**.

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. Check NBIJLST and use a position number and suffix combination that has not been used before.

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 8.3 (DEVL)

Pending Change

Proxy For:

ID: G00720090 George Smith

Transaction: 712850 Waiting

Approval Category: OHGRA Original Hire, GRA

Approval Type: GENJBF Create general job, fixed-term

Generate ID:

Query Date: 11-FEB-2011 Last Paid Date:

Position: GR1787 Grad Rsch Asst


Suffix: 00

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

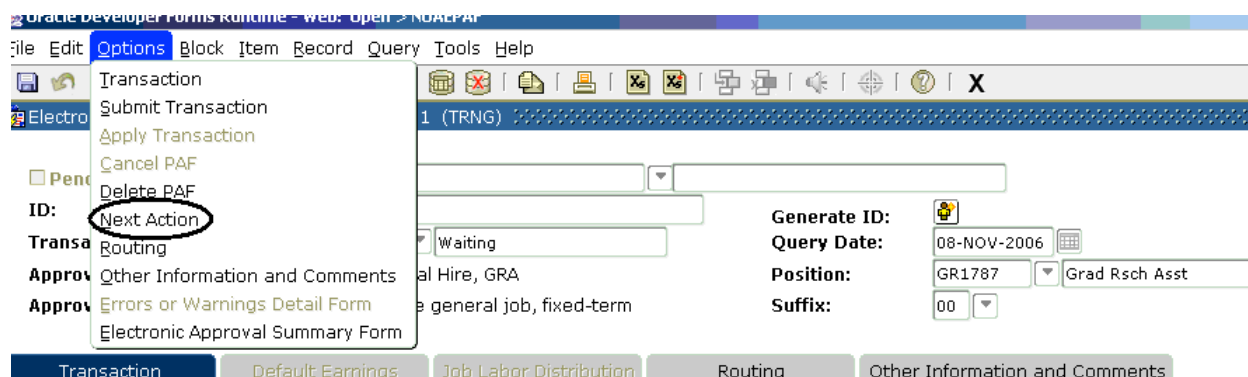
Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		
<input type="checkbox"/>	Jobs Effective Date		25-AUG-2011
<input type="checkbox"/>	Personnel Date		
<input type="checkbox"/>	Job Begin Date		25-AUG-2011
<input type="checkbox"/>	Hours per Day		8
<input type="checkbox"/>	Annual Salary		10000
<input type="checkbox"/>	Hours per Pay		86.67
<input type="checkbox"/>	Title		
<input type="checkbox"/>	FTE		0
<input type="checkbox"/>	Appointment Percent		100

- A. **Employee Class Code** – This will automatically populate with **GR** after the EPAP has been approved. As a New Value, it will appear blank. It cannot be changed...
- B. **Jobs Effective Date** – The date entered must be the 10th or the 25th of the month. Most graduate research assistants positions begin August 25 in the fall and January 25 in the spring. Enter the date that is closest to when the employee is to begin working. This is a required field. Contact your 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 date the employee is to begin working in this job.
- D. **Jobs Begin Date** – Must be the same as the effective date, either the 10th or the 25th.
- E. **Hours per Day** – This will automatically populate to **4**. This field will need to be updated according to the number of hours the employee is expected to work per day.
- F. **Annual Salary**- Enter the total amount to be paid for the semester. This field is a required.
- G. **Hours per Pay** – This will automatically populate to **43.33**. This field will need to be updated according to the number of hours the employee is expected to work per pay period. This number should correspond with the **Hours per Day** field. There is a chart online that can assist with this calculation.
- H. **Title** – If left blank, it will default from the position information in Banner. Please note, there is a 30 character limit.

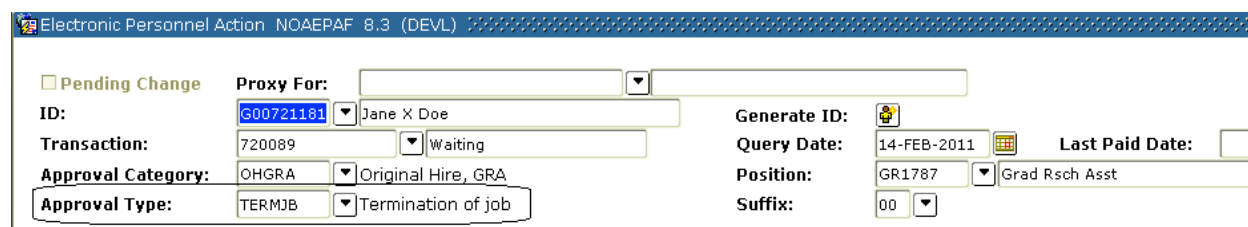
Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Annual Salary		10000
<input type="checkbox"/>	Hours per Pay		86.67
<input type="checkbox"/>	Title		
<input checked="" type="checkbox"/>	FTE		0
<input type="checkbox"/>	Appointment Percent		100
<input type="checkbox"/>	Factor		9
<input type="checkbox"/>	Pays		9
<input type="checkbox"/>	Job Change Reason		NH
<input type="checkbox"/>	Contract Type		P
<input type="checkbox"/>	Salary Encumbrance		


- I. **Use the scroll bar to scroll down to additional fields.**
 - J. **FTE** – This will automatically populate with **0**. This is the default FTE value for a Graduate Research Assistant. The default GTE value for a Graduate Teaching Assistant is **.25**. It can be revised as needed with a value greater than 0 and less than 1.
 - K. **Appointment Percent** – This will automatically populate with **100**. It cannot be changed.
 - L. **Factor**- Enter the number of pays for the employee. The default is 9, as there are 9 paydays in either the Fall or Spring semesters. Use 18 for academic year appointments. The start date, pays/factors and end date **must** align for the employee to be paid correctly.
 - M. **Pays**- THIS NUMBER IS ALWAYS THE **SAME AS THE FACTOR** field.
 - N. **Job Change Reason** – This will automatically populate with **NH** (for new hire). It cannot be changed.
 - O. **Contract Type** – This will automatically populate with **P**. It cannot be changed.
 - P. **Salary Encumbrance** – Leave this field blank.
15. Once you have entered information in all the required fields on the **GENJBF** page, click the **F10** button or the  icon to save.

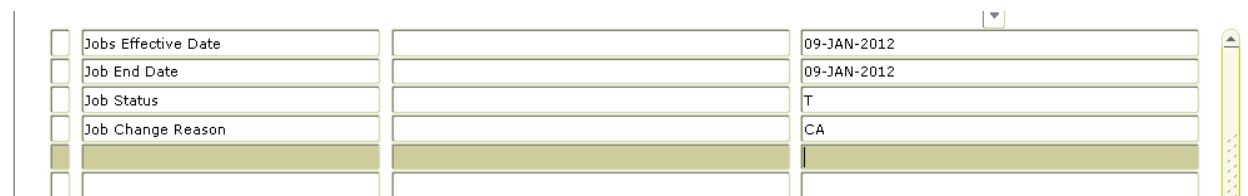
16. To reach the next fields, select **Next Action** from the **Options** menu.




17. Notice that the Approval Type has changed to TERMJOB (terminate jobs record).



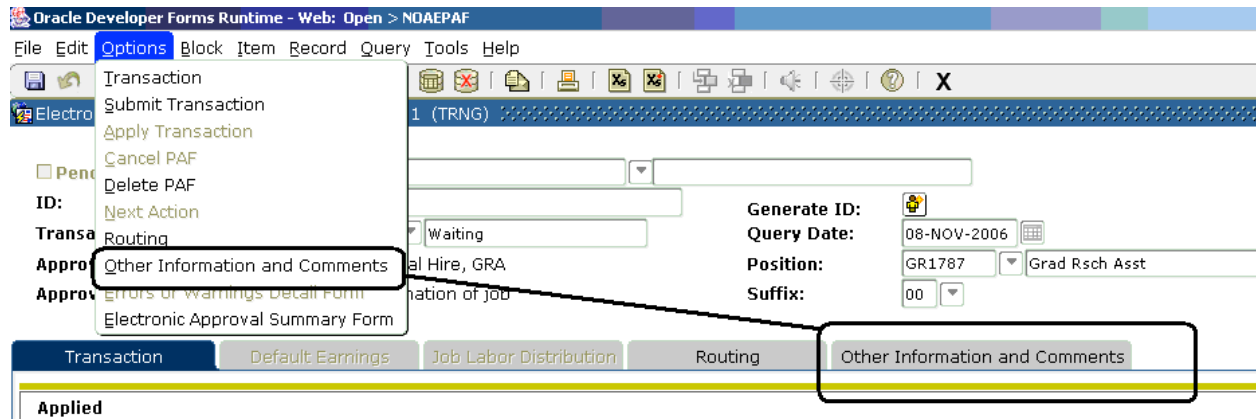
18. Press CONTROL-PAGE DOWN or click the  **NEXT BLOCK** icon to enter the end date of the assignment.



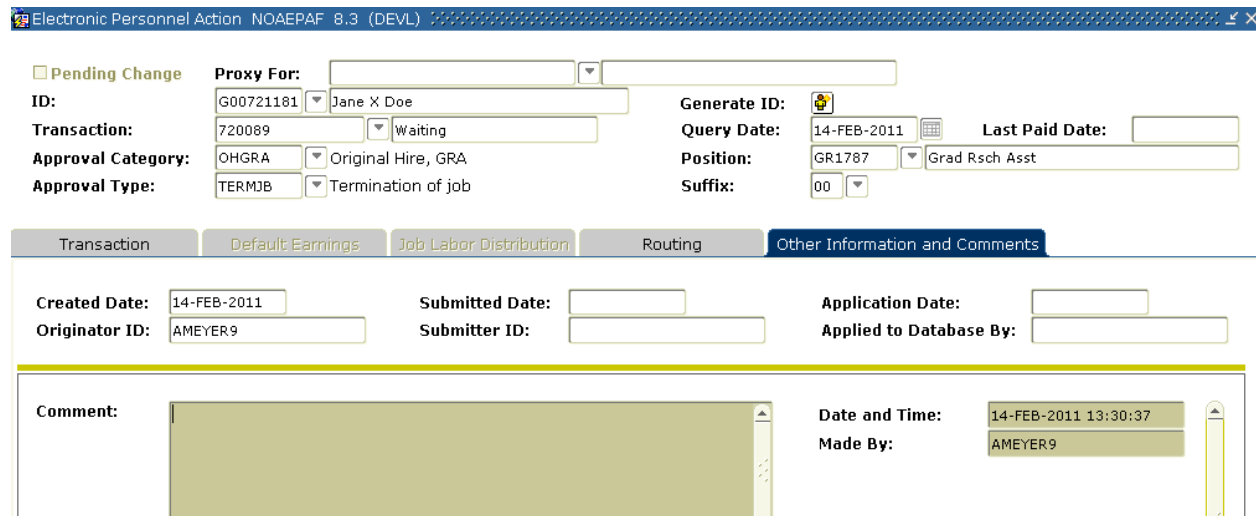
- A. **Jobs Effective Date** – The date entered must be either the 9th or 24th of the month. For example if the end date is January 24, 2009, type 24-JAN-2009 in the field. Generally the end dates for graduate research assistants are January 9 for fall semester and May 24 for spring semester. This is a required field.
- 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**- This will auto-populate with **CA** (completion of appointed). It cannot be changed.

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

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



21. 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.

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 EPAFs - **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.

Oracle Developer Forms Runtime - Web: Open - NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.2.0.1 (TRNG)

Pending Change

Proxy For: G0056 Mr I

ID: G0056

Transaction: 160899 Waiting

Approval Category: MODPAY Modify Pay Rate

Approval Type: MODPAY Modify pay rate

Transaction Default Earnings Job Labor Distribution

Originator ID: IR

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

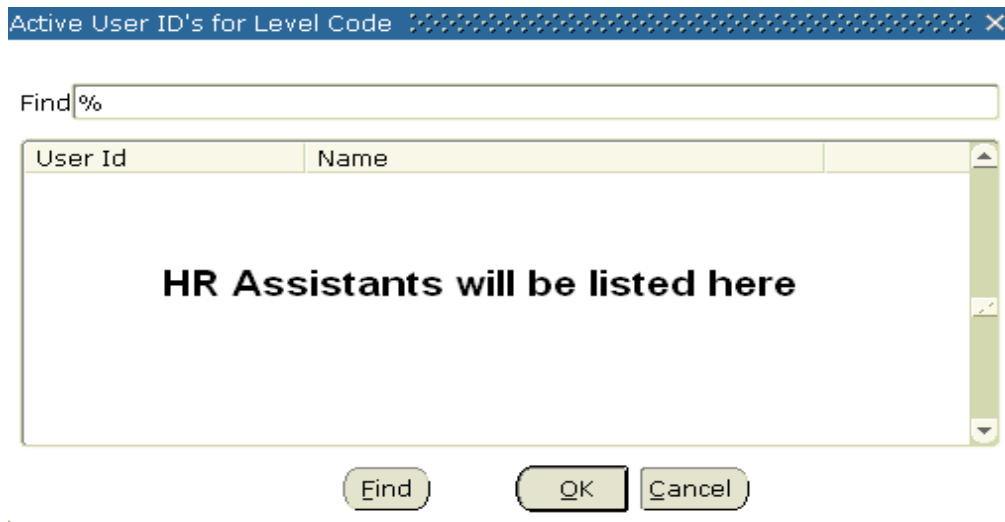
Active User ID's for Level Code

Find%

User Id	Name
A	A
AB	A
AB	A
AB	A
AC	A
AE	A
AF	A
AH	A
AH	A


Find End OK Cancel

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

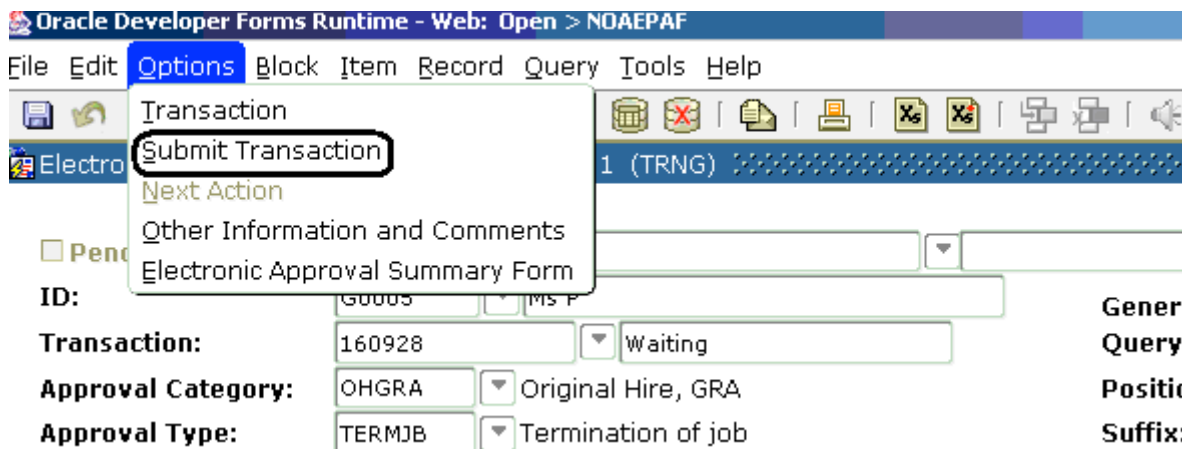


WARNING: Once you submit this transaction you *cannot* delete or void it. You will need to contact the appropriate approver or the HR Assistant to have the transaction voided. If you want to delete or void it prior to submission, select **Delete PAF** from the **Options** menu (you must first return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

Level Code	Level	User ID	Name	Required Action	Queue Status	Act
REQAPP	40	PD	Ms P	Approval	In Queue	
APPLY	90	RC	Mr R	Apply	In Queue	

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

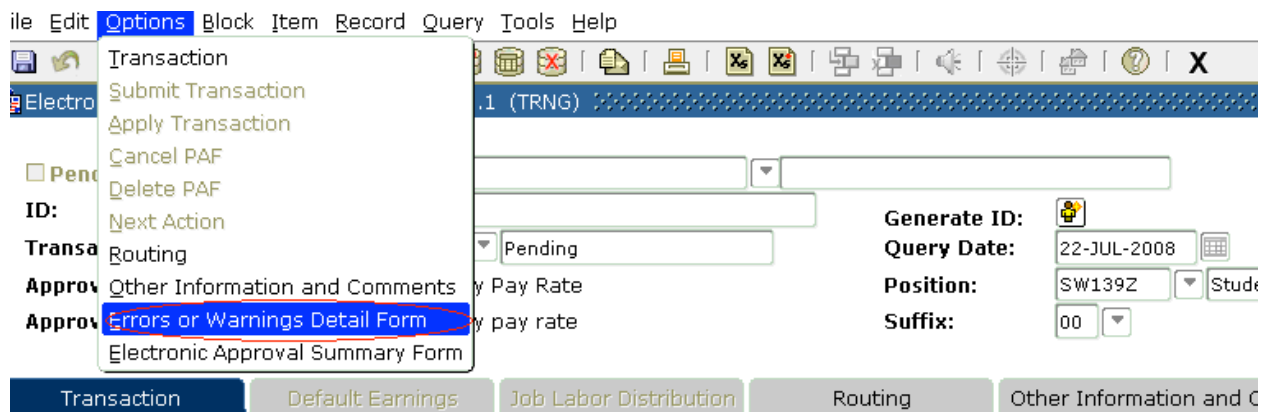
24. To submit the transaction, select **Submit Transaction** from the **Options** menu.



A. If the submission is complete, the bottom left corner of the screen will say “transaction submitted.” If transaction is not complete, the bottom left corner might note that there are errors. You cannot continue until any errors are correct. 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.


Transaction submitted.
 Record: 1/2

- B. To view any errors, select “Errors or Warnings Detail Form” from the **Options** menu. Control-Page Down or click the  **NEXT BLOCK icon** to view the errors/warnings.



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

- Transaction
- Submit Transaction
- Apply Transaction
- Cancel PAF
- Delete PAF
- Next Action
- Routing
- Other Information and Comments
- Errors or Warnings Detail Form**
- Electronic Approval Summary Form

Transaction ID: Pending
 Generate ID: 
 Query Date: 22-JUL-2008
 Position: SW139Z
 Suffix: 00

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

Applied Status	Field Name	Current Value	N
P	Jobs Effective Date	13-APR-2008	17-AUG-2008



Proxy For:

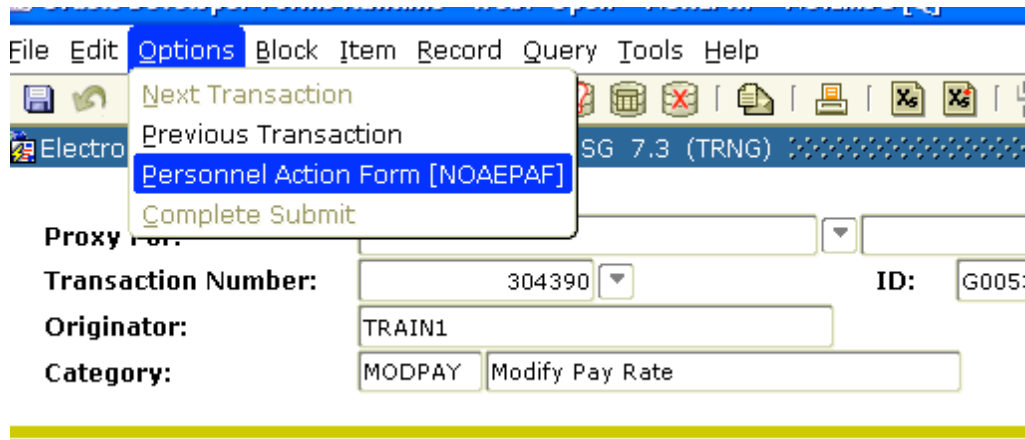
Transaction Number: 304426 ID: G0039 Ms M

Originator: TRAIN1

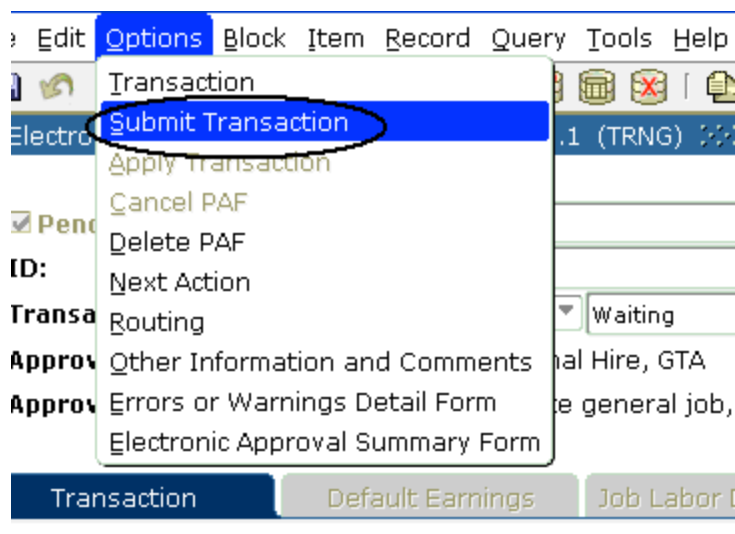
Category: OHGRA Original Hire, GRA E

Approval Type	Error Type	Errors and Warnings Information
GENJBF	WARNING	*WARNING* Conflicting job factors found. Job will not be reported on IPEDS.
GENJBF	ERROR	*ERROR* This employee already has a primary job.
TERMJB	WARNING	*WARNING* Conflicting job factors found. Job will not be reported on IPEDS.

- 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.



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: George Smith

Transaction: