Welcome to the Internet Native Banner Training Guide

Original Hire – MISCELLANEOUS PAYS (OHMISC)

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

1. Create a Person Record in SPAIDEN.

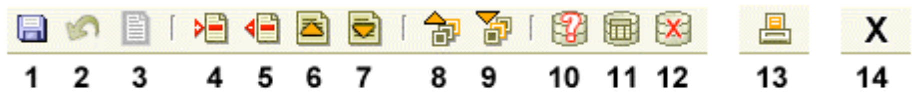
2. Check NBI JLST to see if the assignment will be an original or current hire and check the previous suffixes, if applicable.

3. Create an employee record and job record using NOAEPAF.

This Electronic Personnel Action Form (EPAF) type is used for compensation for work completed that is outside of an exempt employee's EWP and that is temporary in nature.

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.

<u>Navigation Shortcuts</u>

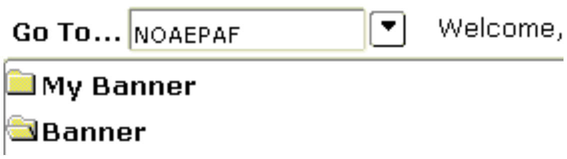


Function	Pull-down Menu Option	Shortcut	Toolbar Icon
Save or Commit	File/Save	F10	1
Rollback	File/Rollback	Shift + F7	2
Select	File/Select	Shift + F3	3
Insert Record	Record/Insert	F6	4
Delete Record	Record/Remove	Shift + F6	5
Previous Record	Record/Previous	Up Arrow	6
Next Record	Record/Next	Down Arrow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

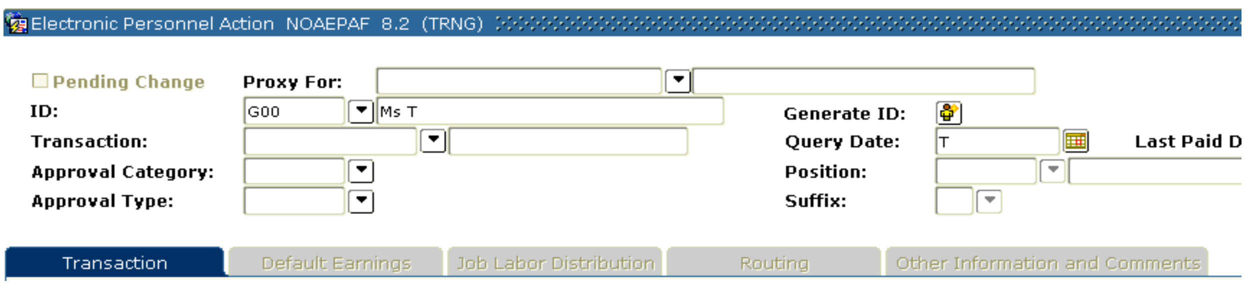
Step by Step Instructions

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.

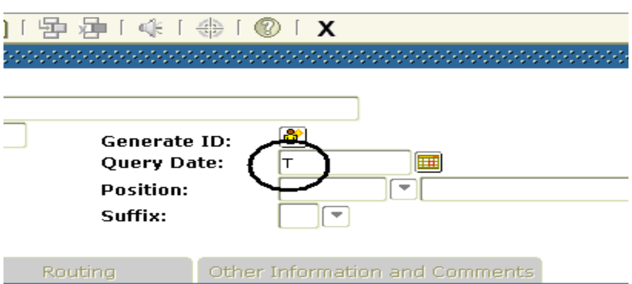


2. This screen auto-populates with the last person for which you were making entries, so be sure to verify you want to enter an assignment for this person. Enter the correct G number in the ID field.



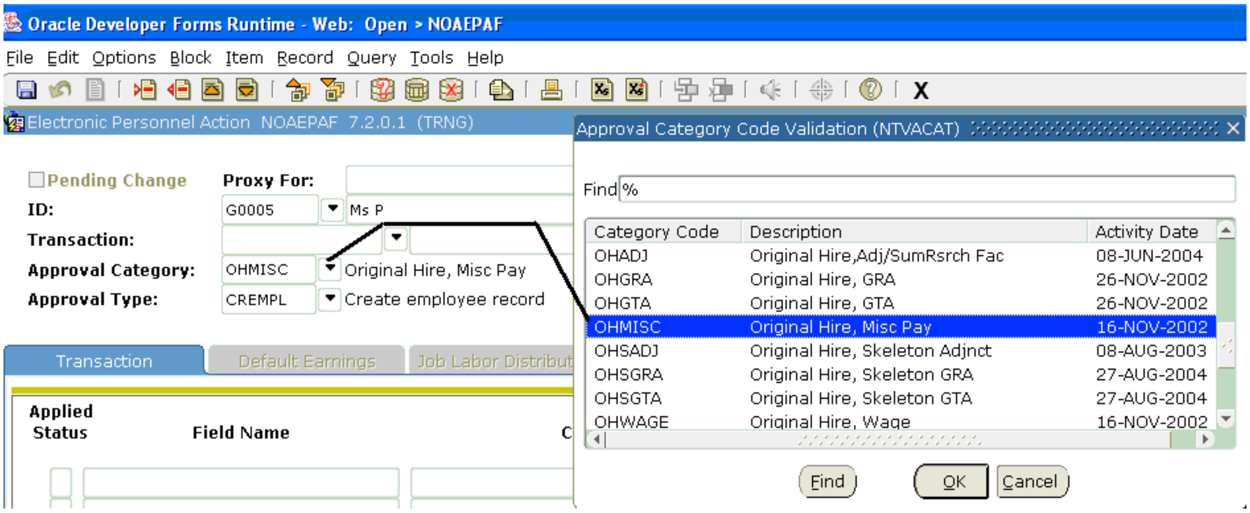
3. Enter the current date in the ***Query Date*** field and press **Tab**.

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

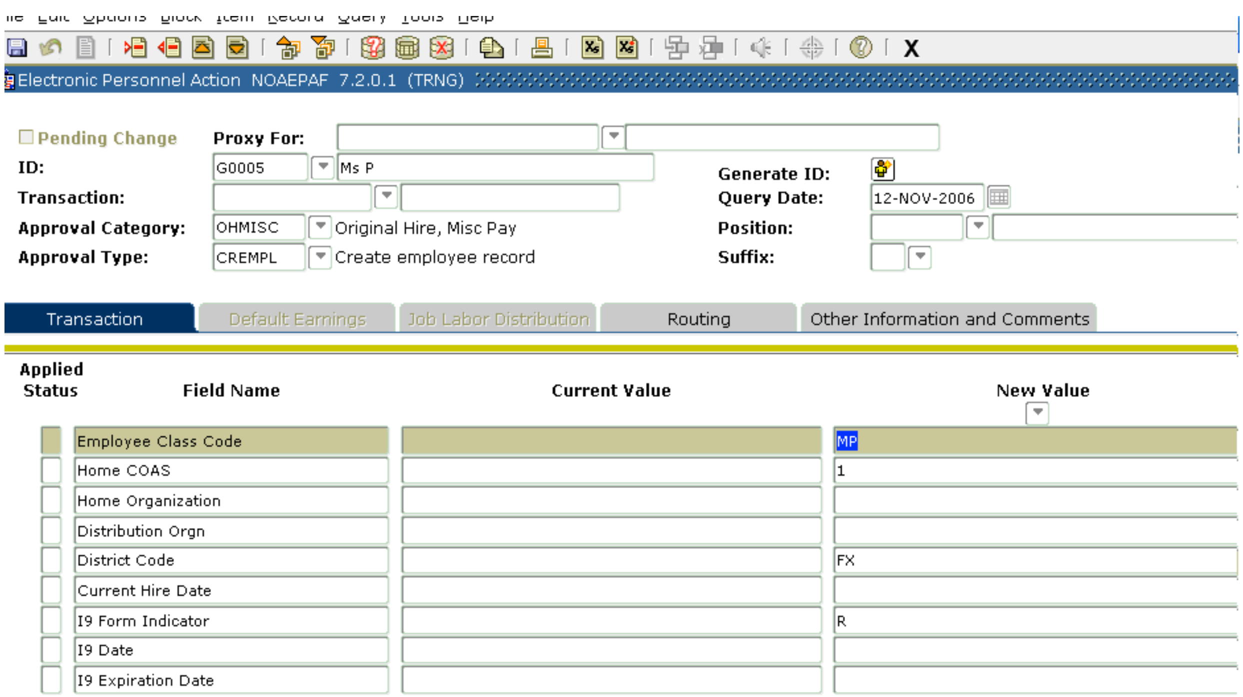


4. Enter the appropriate Approval Category; select OHMISC for Original Hire, Miscellaneous Pay. By double-clicking the ▾ icon next to *Approval Category* field, the list of acceptable values is displayed. For example, if we are hiring an employee who has not worked for GMU before, the appropriate ***Approval Category*** is **OH%** for Original Hire, followed by their employee type, MISC, (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.



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.



A. ***Employee Class Code*** – This will automatically populate with **MP**. It cannot be changed.

B. ***Home COAS*** (chart of accounts) – This will auto-populate. It cannot be changed.

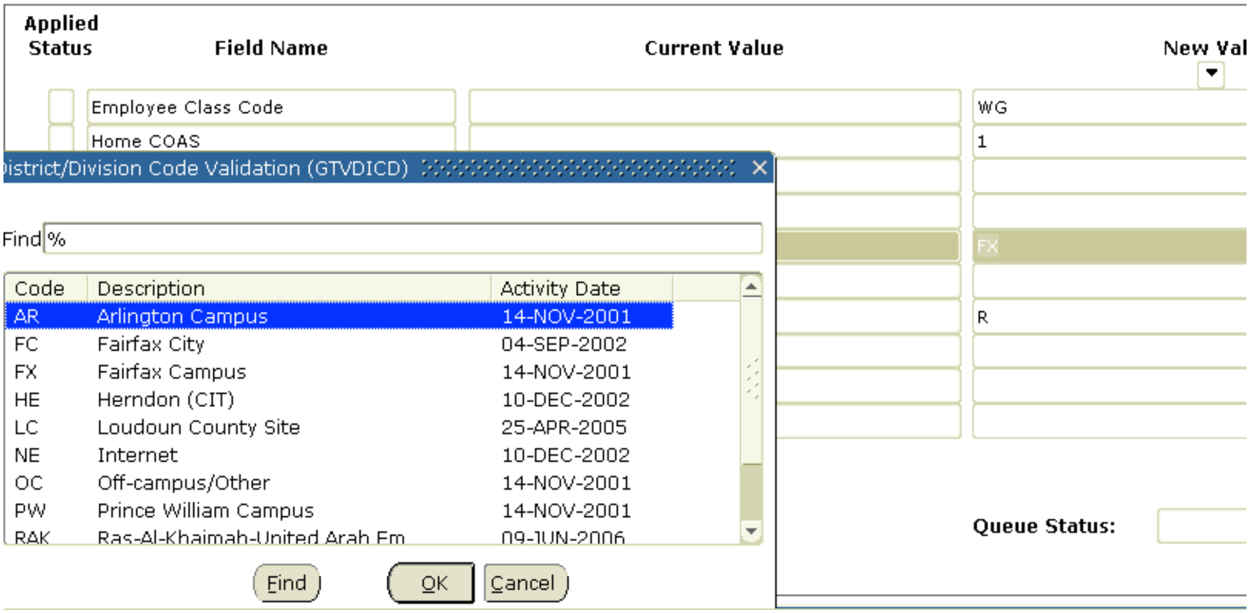
C. ***Home Organization*** – Enter the organization number that corresponds to the origination number that is paying this person. This is a required field.

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.



F. ***Current Hire Date*** – This field is the first day of a pay period, either 10th or 25th.

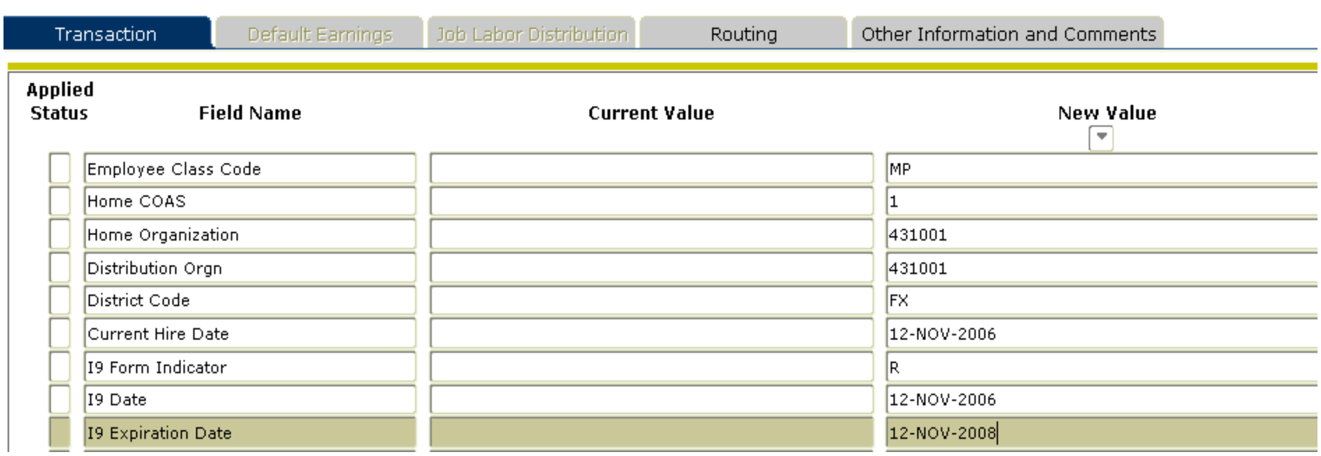
G. ***I-9 Form Indicator*** – This field must be populated with a value to indicate that the employer has received the I-9. This is a required field. The only acceptable values for this field are:

   a. **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.

   b. **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.

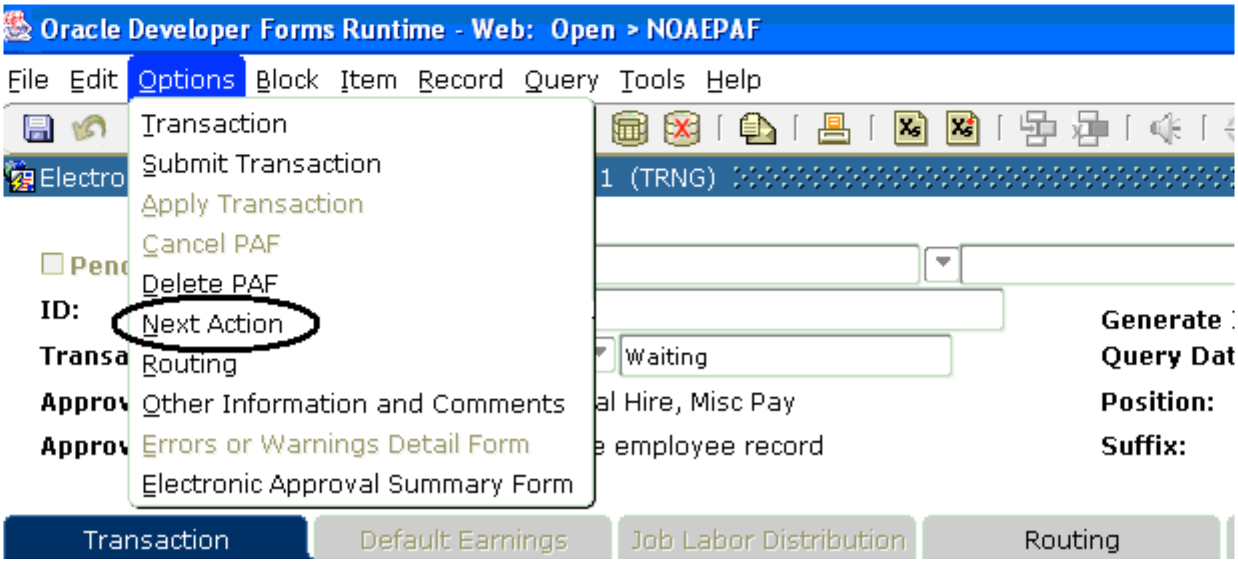
H. ***I-9 Date*** – Enter the date the I-9 is completed and/or certified by OIPS. This is a required field.

I. ***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. The completed Form I-9 will be provided by the employee after meeting with the Office of International Programs & Services.

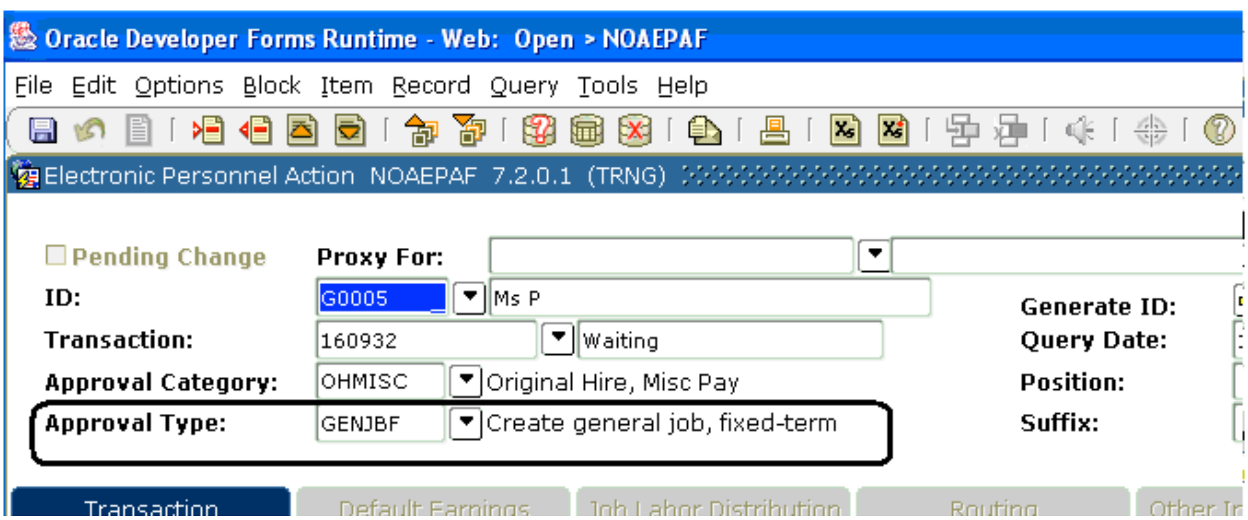


7. Once you have entered information, click the **F10** button or the icon to save.

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

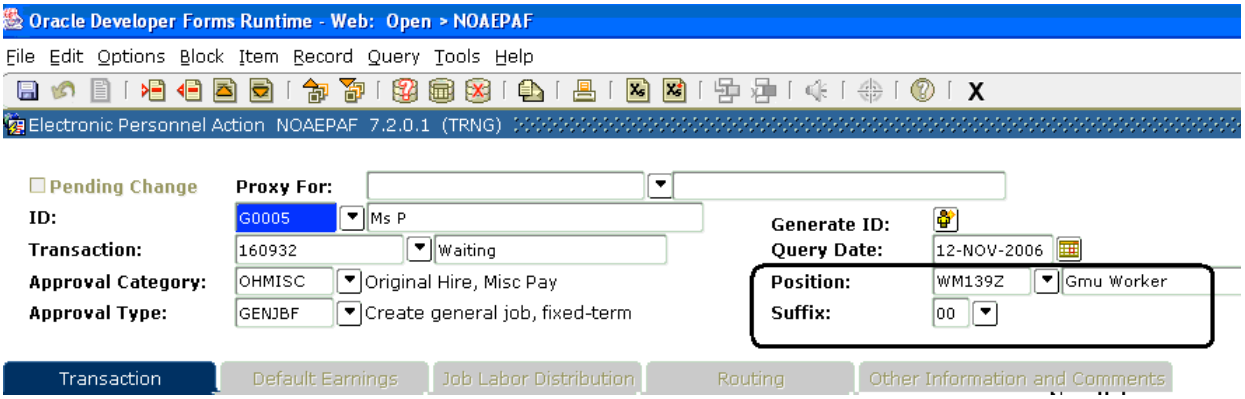


9. You can now begin to create a job record. You will notice that the ***Approval Type*** has changed to **GENJBF** (create general job record for a fixed term).



10. The next step is to enter the position number. You can reach this field by using the TAB key. The prefix 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.**

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

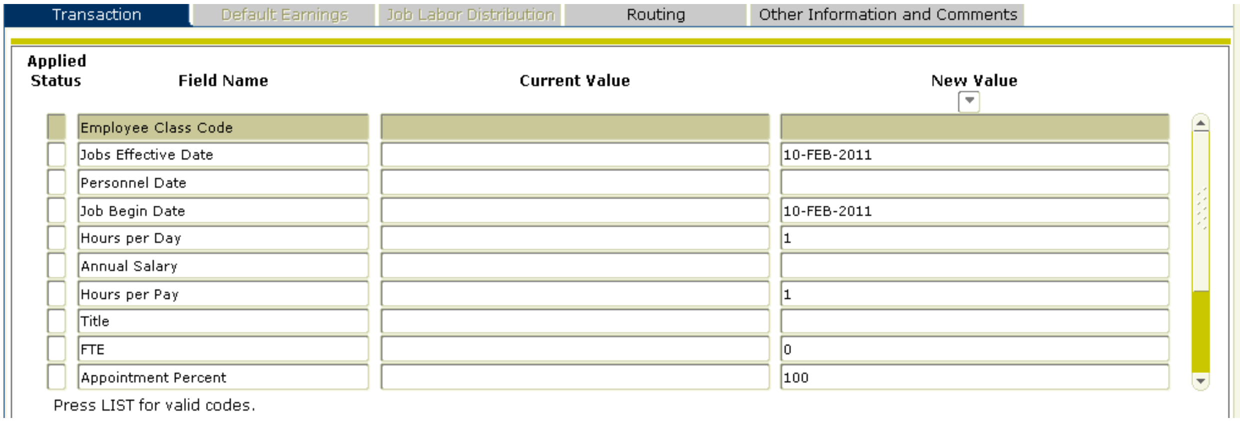


12. Press Control-Page Down to reach the next field.

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. This is no longer an Original Hire EPAF. Delete the transaction and use the Current Hire training manual to hire this employee.



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

Applied Status	Field Name	Current Value	New Value
	Employee Class Code		
	Jobs Effective Date		10-FEB-2011
	Personnel Date		
	Job Begin Date		10-FEB-2011
	Hours per Day		1
	Annual Salary		
	Hours per Pay		1
	Title		
	FTE		0
	Appointment Percent		100

Press LIST for valid codes.

A. ***Employee Class Code*** – This will automatically populate with **MP** after the EPAF 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 first day of the pay period. The date entered must be the 10th or the 25th of the month. 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.

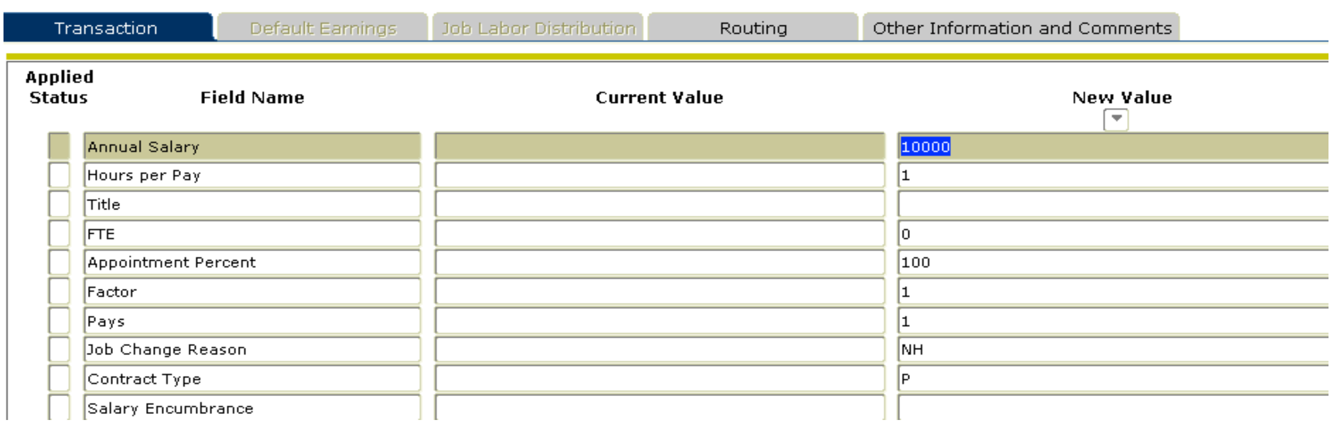
D. ***Jobs Begin Date*** – Must be the same as the job effective date, either the 10th or the 25th

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*** – 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.



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

Applied Status	Field Name	Current Value	New Value
	Annual Salary		10000
	Hours per Pay		1
	Title		
	FTE		0
	Appointment Percent		100
	Factor		1
	Pays		1
	Job Change Reason		NH
	Contract Type		P
	Salary Encumbrance		

Use the scroll bar to scroll down to additional fields.

I. ***FTE*** – This will automatically populate with **0**. This is the default FTE value for a miscellaneous pay. It cannot be changed.

J. ***Appointment Percent*** – This will automatically populate with **100**. It cannot be changed.

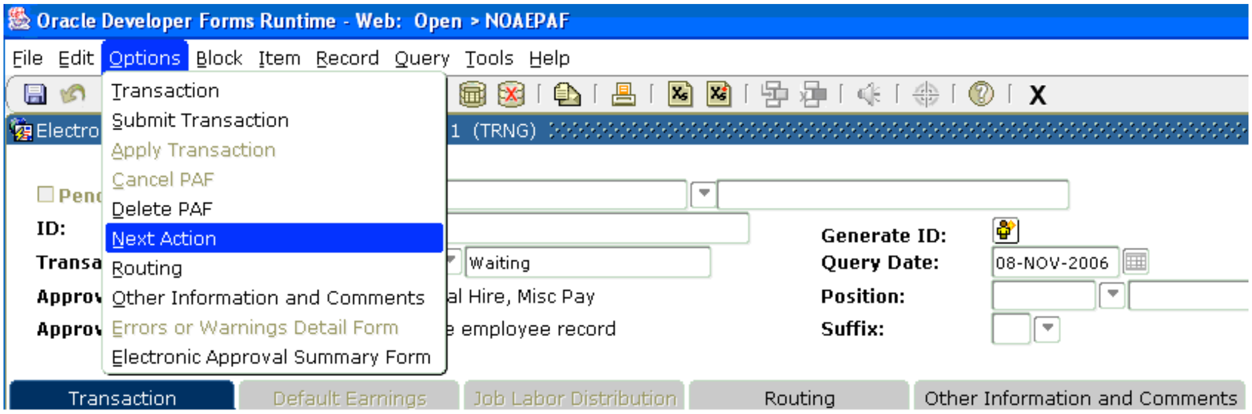
K. ***Factor***- Enter the number of pays for the employee. The default is 7, as there are 7 paydays in either the fall or spring semesters. The start date, pays/factor and end date **must** align for the employee to be paid correctly.

L. ***Pays***- THIS NUMBER IS ALWAYS THE **SAME AS THE FACTOR** field.

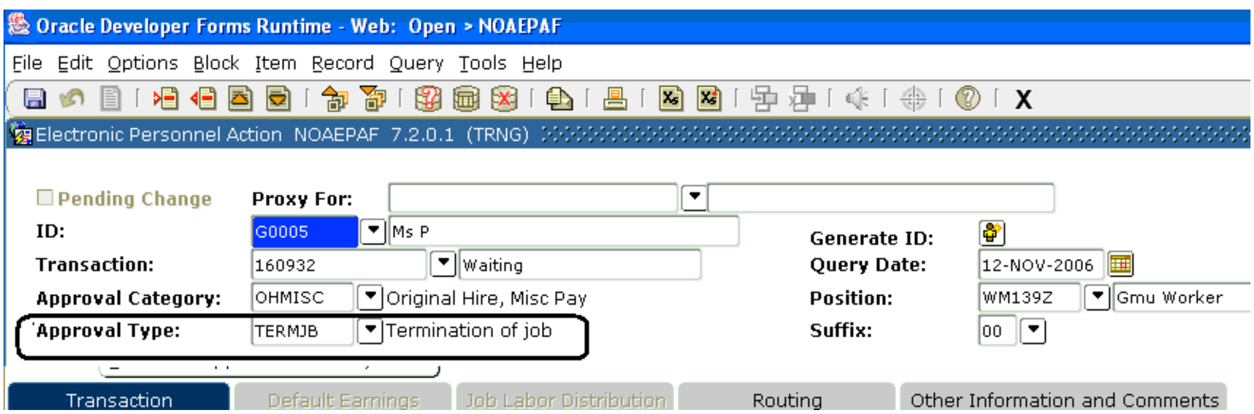
M. ***Job Change Reason*** – This will automatically populate with **NH** (for new hire). It cannot be changed.
N. ***Contract Type*** – This will automatically populate with **P**. It cannot be changed.
O. ***Salary Encumbrance*** – Will automatically populate. It cannot be changed.

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

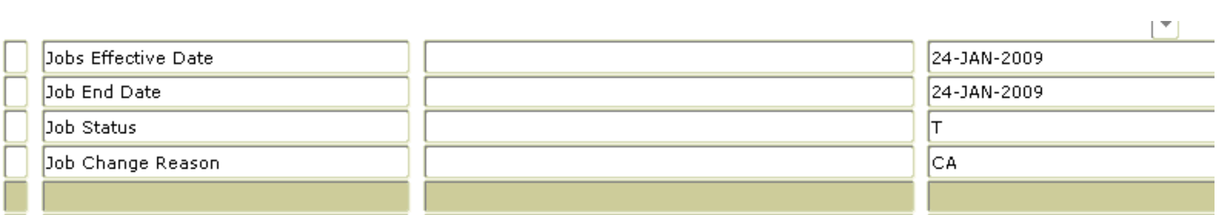
16. To reach the next fields, select **Next Action** from the **Options** menu.



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



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

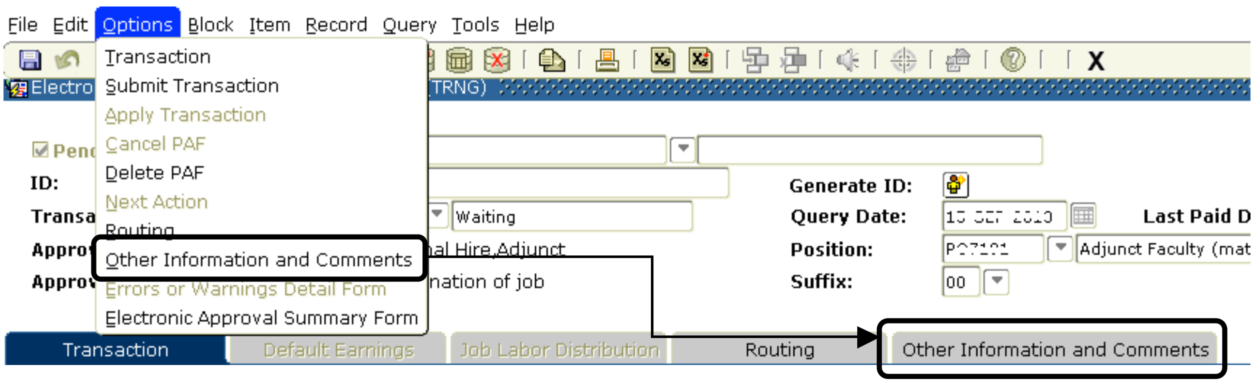


A. ***Jobs Effective Date*** – The date entered must be either the 9th or 24th of the month. **Be sure that the start date, pays/factor and end date all align.**
B. ***Jobs End Date*** – This date **must** match the job effective date. This is a required field.
C. ***Job Status***- This will auto-populate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

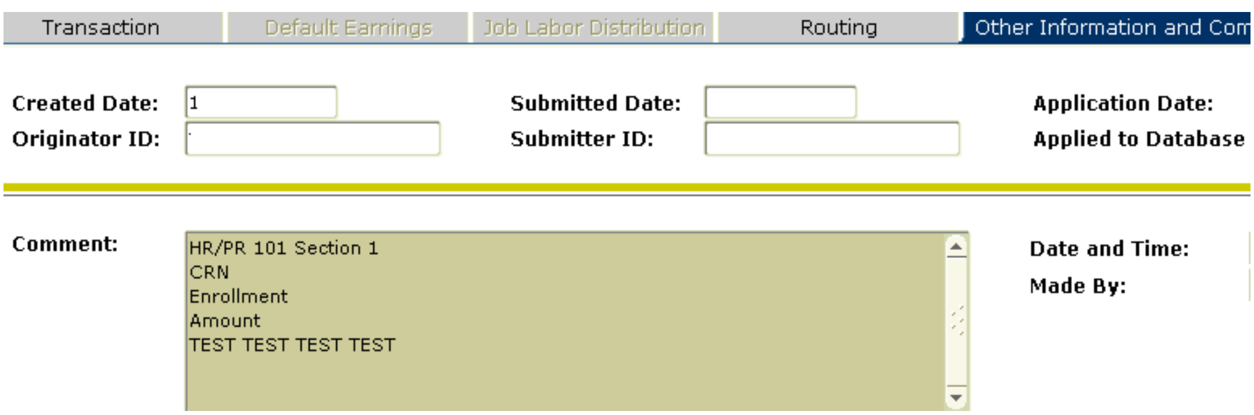
cannot be changed.

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.**

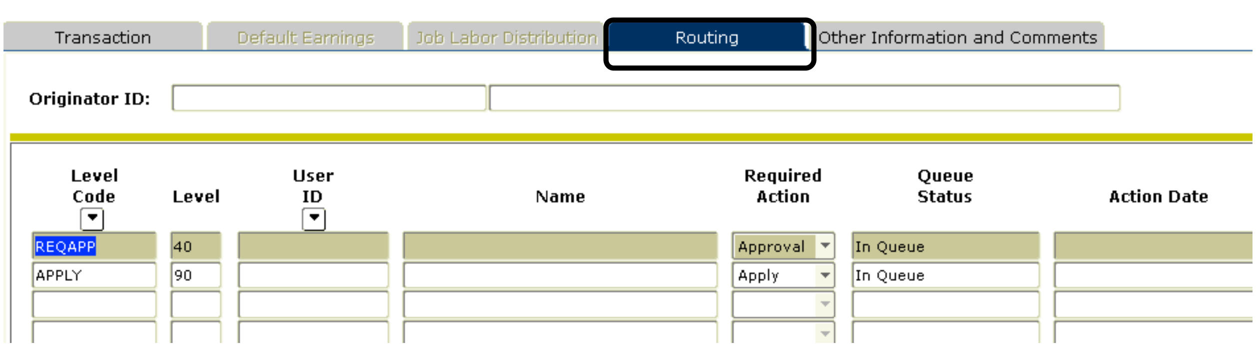


A. If this position is funded by Sponsored Research, the term length, projected labor amount, and grant number should be entered in the comments field before OSP will approve the EPAF.



21. Once you have entered information in the **Comment** field, click the **F10** button or the icon to save.

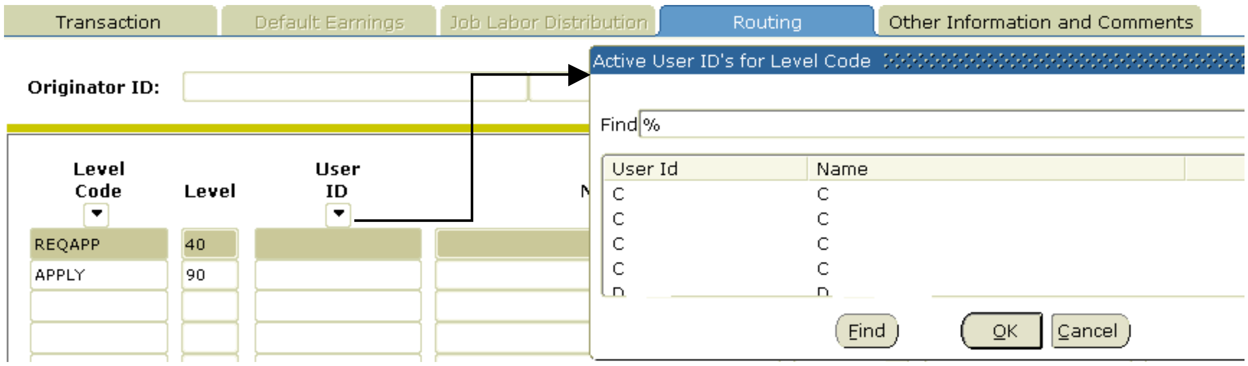
22. Next click on the **Routing** tab or select **Routing** from the **Options** menu. This is where you will enter the names of the individuals who will approve the EPAF.



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**.

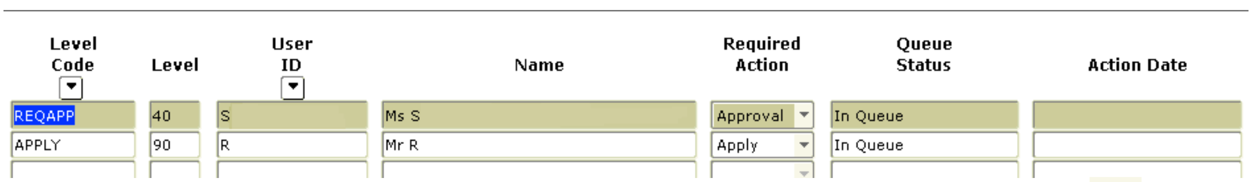
B. The **Required Approver** is generally the departmental approver.



C. The **Applier** is the person who will finalize the hire in the database. This is **<u>always</u>** 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.).

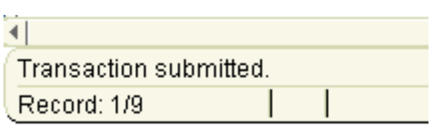
WARNING: Once you submit this transaction you ***cannot*** delete or void it. You will need to contact the appropriate approver or the HR Assistant to have the transaction voided. If you want to delete or void it prior to submission, select **Delete PAF** from the **Options** menu (you must first return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



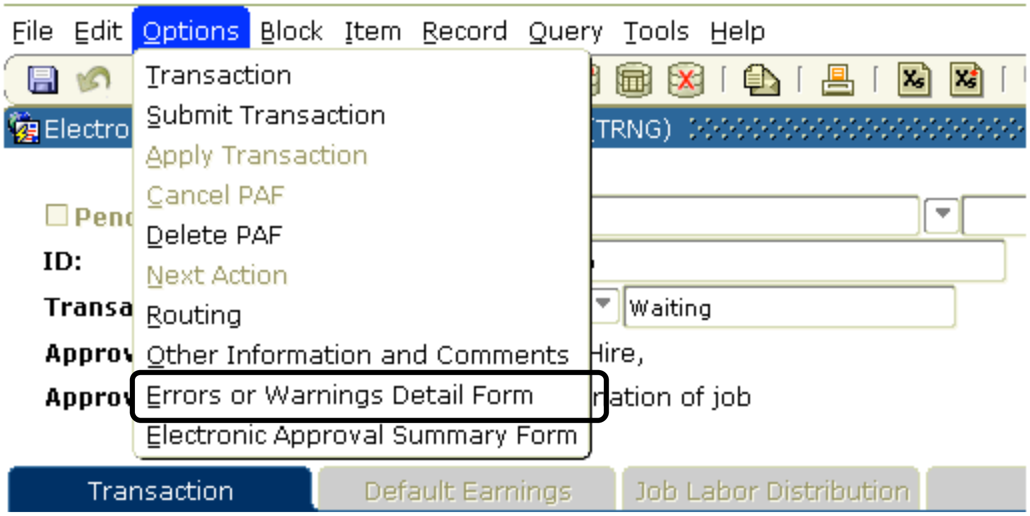
23. Once you have entered routing information, click the **F10** button or the **Save**  icon.

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

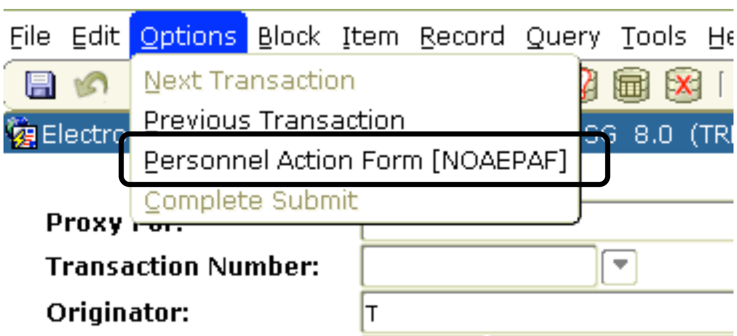
A. If the submission is complete, the bottom left corner of the screen will say "transaction submitted."



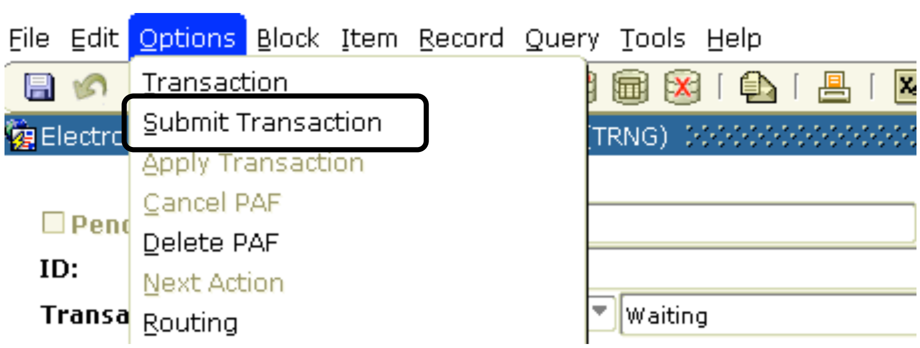
B. If the transaction is not completed, the bottom left corner might note that there are errors or it might take you directly to the "Electronic Approvals Error Message," **NOIEMSG** page. A transaction with warnings can be submitted (you will need to select "Complete Submit" from the **Options** menu)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