Original Hire – WORK STUDY (OHWKST)

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

1. Create a Person Record in SPAIDEN.

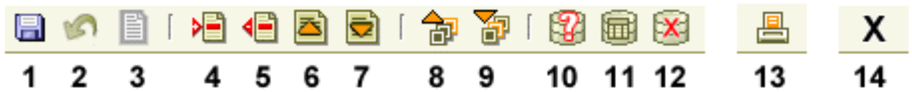
2. Check NBI JLST to see if the assignment will be an original or current hire and check the previous suffixes, if applicable.

3. Create employee record and job record using NOAEPAF.

This Electronic Personnel Action Form (EPAF) type is used when you are hiring a student work study employee. There are equivalent categories for non-student wage and student wage. Work study employees are students in pursuit of a degree who have received a work study award though Student Financial Aid. Work study EPAFs will automatically route through Student Financial Aid. You do not need to add anything to the Routing Queue.

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



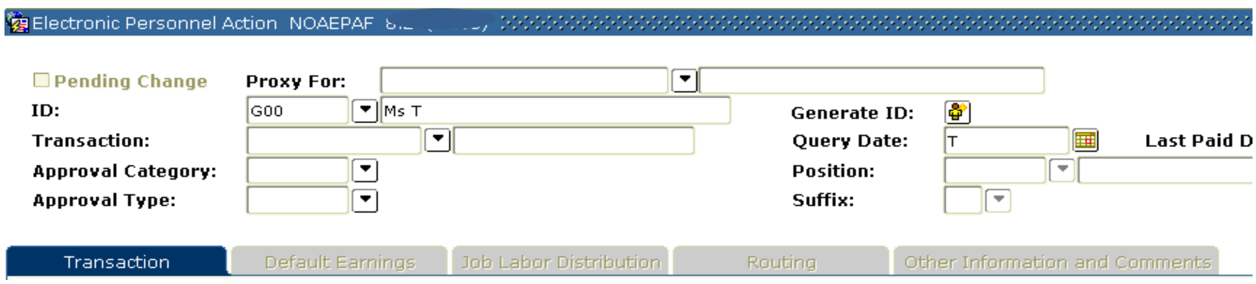
Function	Pull-down Menu Option	Shortcut	Toolbar Icon
Save or Commit	File/Save	F10	1
Rollback	File/Rollback	Shift + F7	2
Select	File/Select	Shift + F3	3
Insert Record	Record/Insert	F6	4
Delete Record	Record/Remove	Shift + F6	5
Previous Record	Record/Previous	Up Arrow	6
Next Record	Record/Next	Down Arrow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

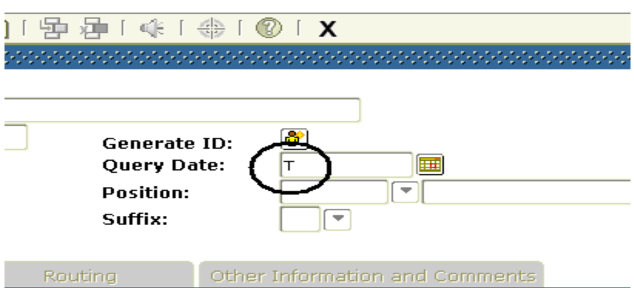
1. Type **NOAEPAF** in text box and click **Enter** to begin the EPAF process.

2. This screen auto-populates with the last person 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.



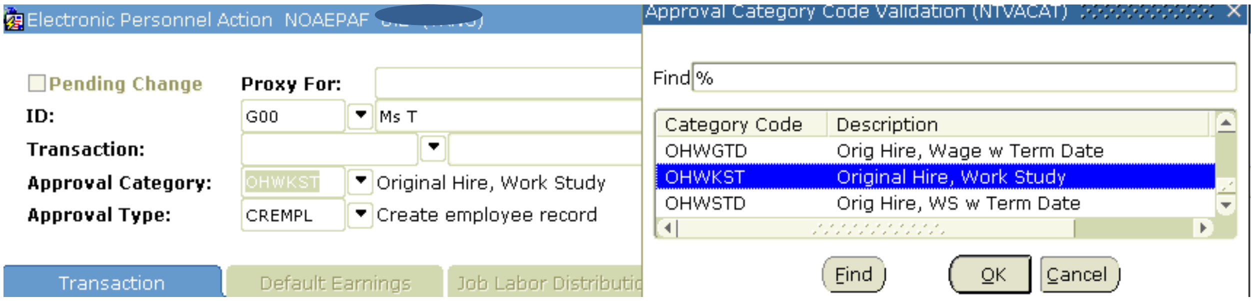
3. Enter the current date in the ***Query Date*** field and press **Tab**.

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

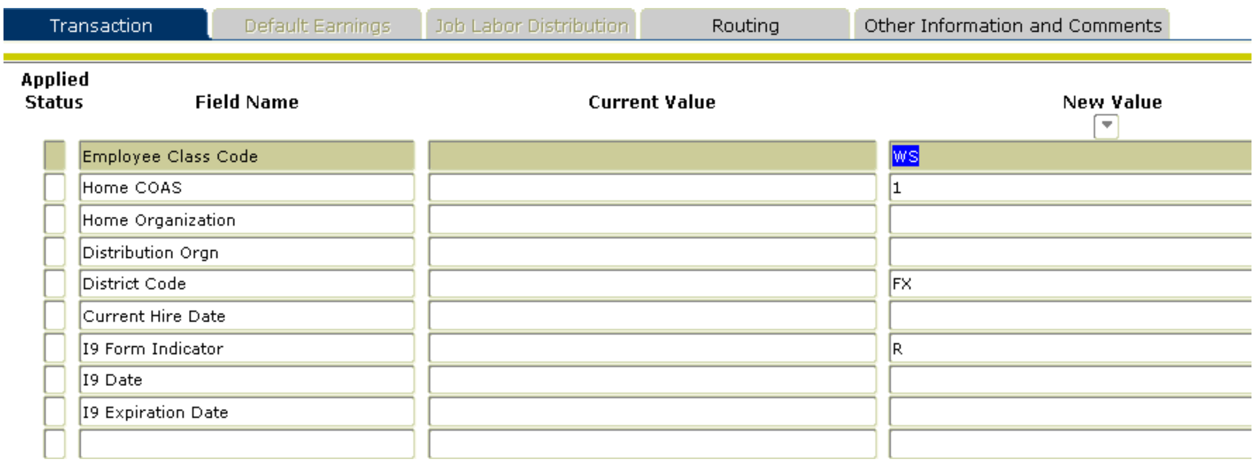


4. Enter the appropriate ***Approval Category;*** select OHWKST for Original Hire, Work Study. By double-clicking the  icon next to *Approval Category* field, the list of acceptable values is displayed. For example, if we are hiring an employee who has not worked for GMU before, the appropriate ***Approval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

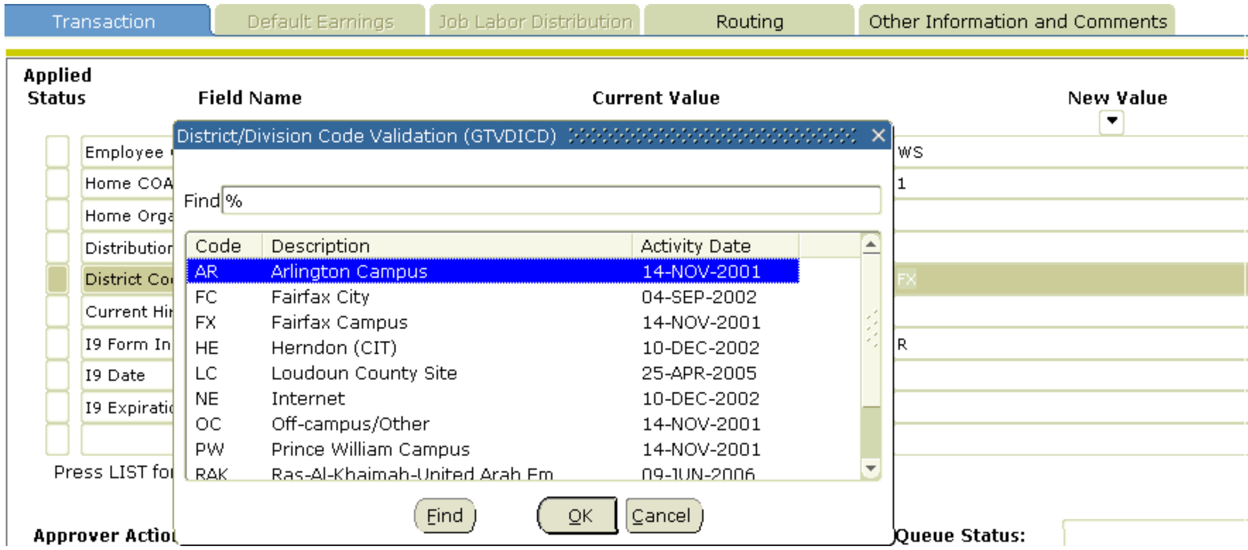


6. Press both CONTROL and PAGE DOWN or click the **NEXT BLOCK icon** to access the next fields. For original hires, there should be **no** data in the Current Value fields. If information appears under Current Value, **stop** and begin again as a current hire. Some information in the **New Value** fields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



A. ***Employee Class Code*** – This will automatically populate with **WS**. 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*** – Enter the employee's start date.

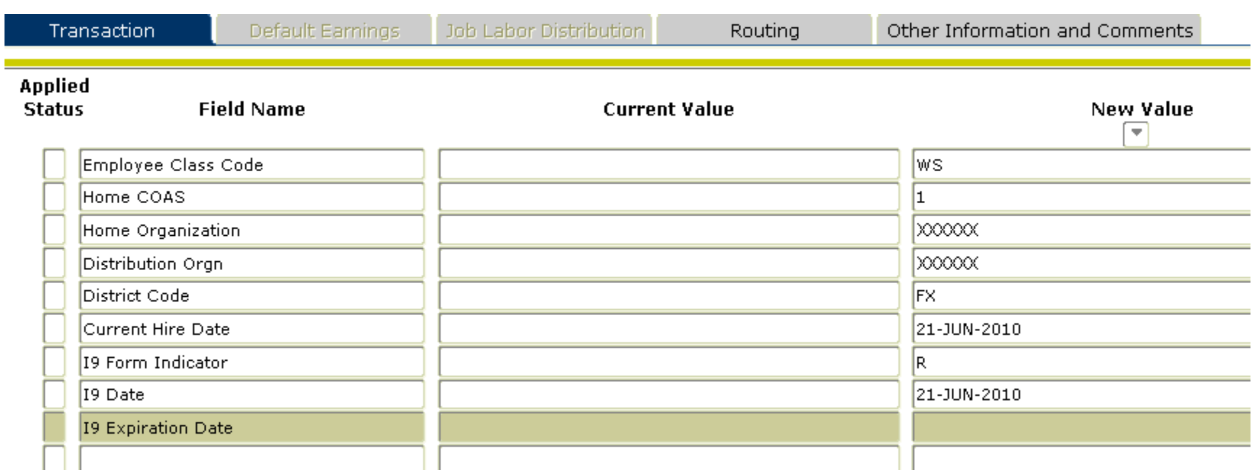
G. ***I-9 Form Indicator*** – This field must be populated with a value to indicate that the employer has received the I-9. This is a required field. The only acceptable values for this field are:

   a. **R (received) -** Indicates that the I-9 was completed **<u>prior</u>** 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 **<u>prior</u>** to the employee beginning work and that the employee is a Non-Immigrant eligible to work in the United States.

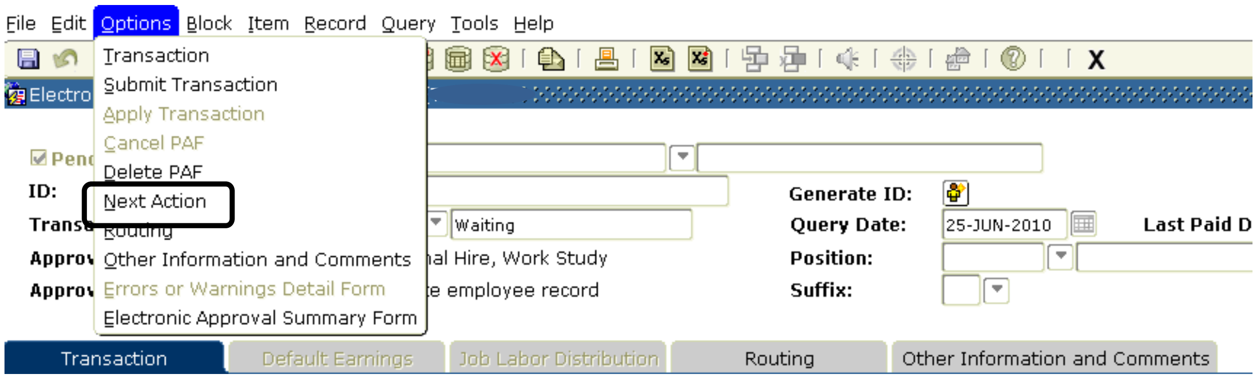
H. ***I-9 Date*** – Enter the date the I-9 is completed and/or certified by OIPS. This is a required field.

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.

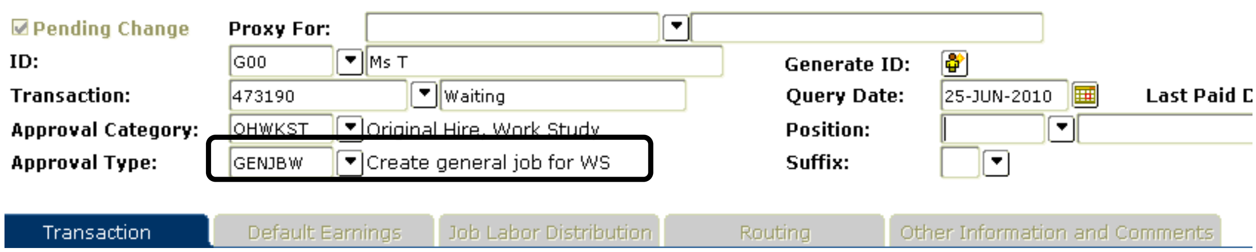


7. Once you have entered information, click the **F10** button or the  icon to save.

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

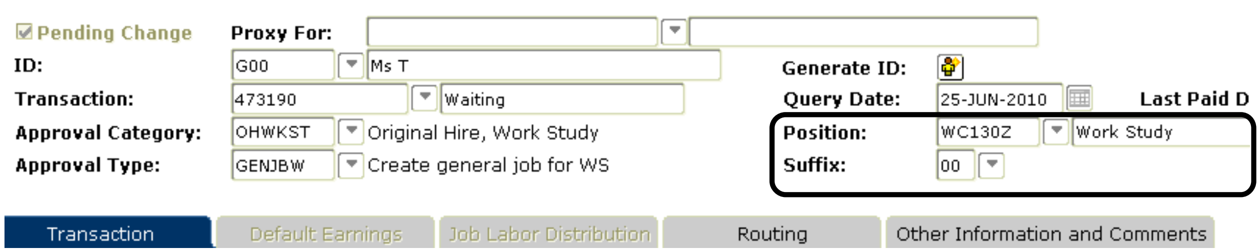


9. You can now begin to create a job record. You will notice that the ***Approval Type*** has changed to **GENJBW** (create general job record for a work study).



10. The next step is to enter the position number. You can reach this field by using the TAB key. The prefix for all work study positions is **WC**. **If you do not know what position number to use, go to the "Pooled Position Lookup Form" under Employee Self-Service in PatriotWeb.**

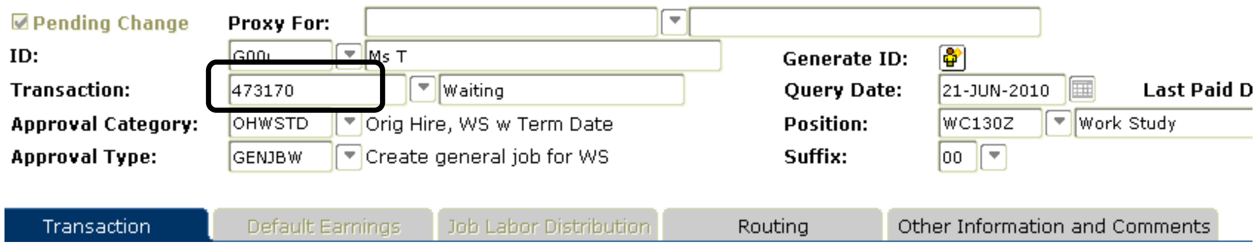
11. Press **TAB**, and then enter the ***Suffix*** (the suffix will be 00 for new employees).



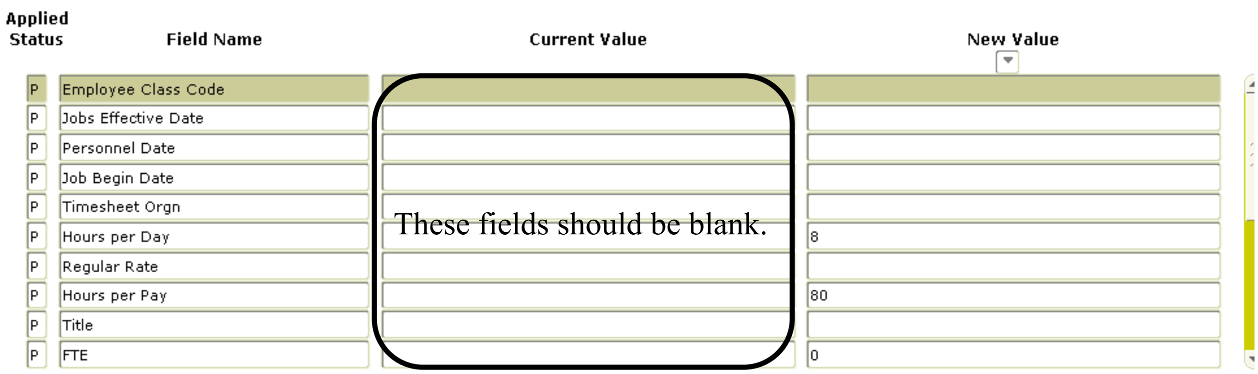
12. Press Control-Page Down to reach the next field.

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.

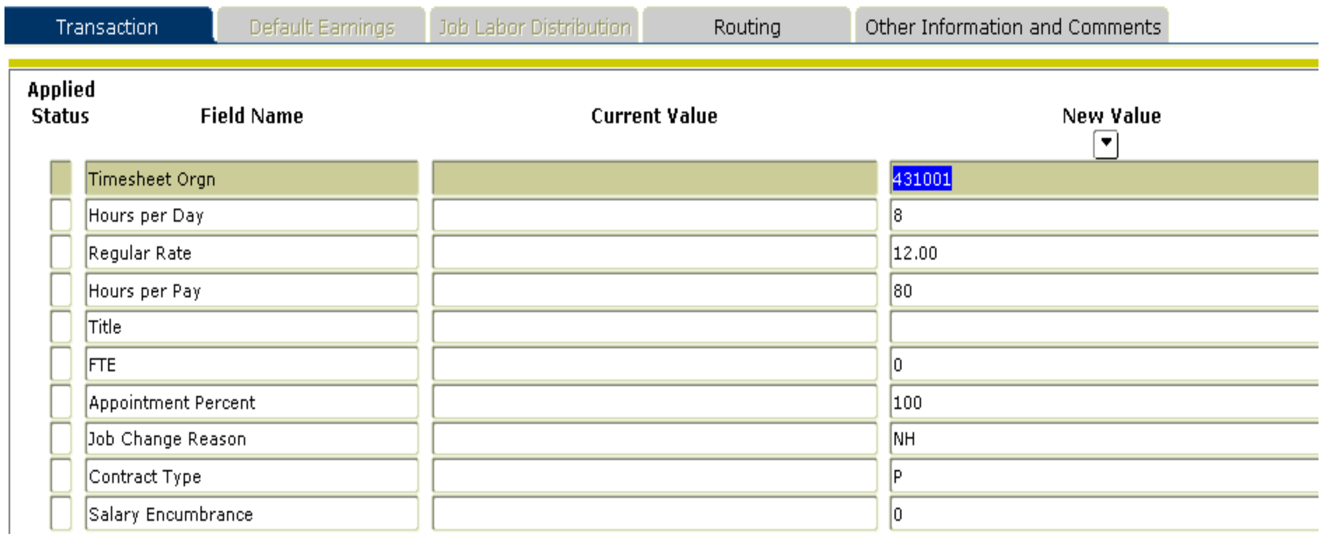
13. At this stage, a transaction number will auto-populate. Write down the transaction number! If you take a break and return to the EPAF later, the quickest way to find the EPAF is by searching on the **NOAEPAF** form with the number. The **Transaction Status** indicates where the transaction is in 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.



A. ***Employee Class Code*** – This will automatically populate 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 employee's first day of work. This date will determine the first day the employee has access to a time sheet.
C. Leave ***Personnel Date*** blank. Once it is applied to the database, the field will auto-populate with the employee's start date.
D. ***Job Begin Date*** – Must be the same as the effective date, the employee's first day of work.
E. ***Timesheet Orgn*** – This number is the label for the timesheet. Enter the organization number that funds the position.
F. ***Hours per Day*** – This will automatically populate with **4.** This field will need to be updated according to the number of hours the employee is expected to work per pay period.
G. ***Regular Rate*** - Enter the hourly rate the employee is paid. This is a required field.
H. ***Hours per Pay*** – This will automatically populate with **40**. 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.
I. ***Title*** – If left blank, it will default from the position information in Banner. 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.
J. ***FTE*** – This will automatically populate with **0**. This is the default FTE value for a wage employee and cannot be changed.



Use the scroll bar to scroll down to additional fields.

K. ***FTE*** – This will automatically populate with **0**. This is the default FTE value for a work study employee and cannot be changed.

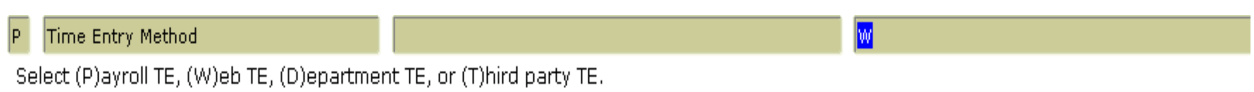
L. ***Appointment Percent*** – This will automatically populate with **100**. It cannot be changed.

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.

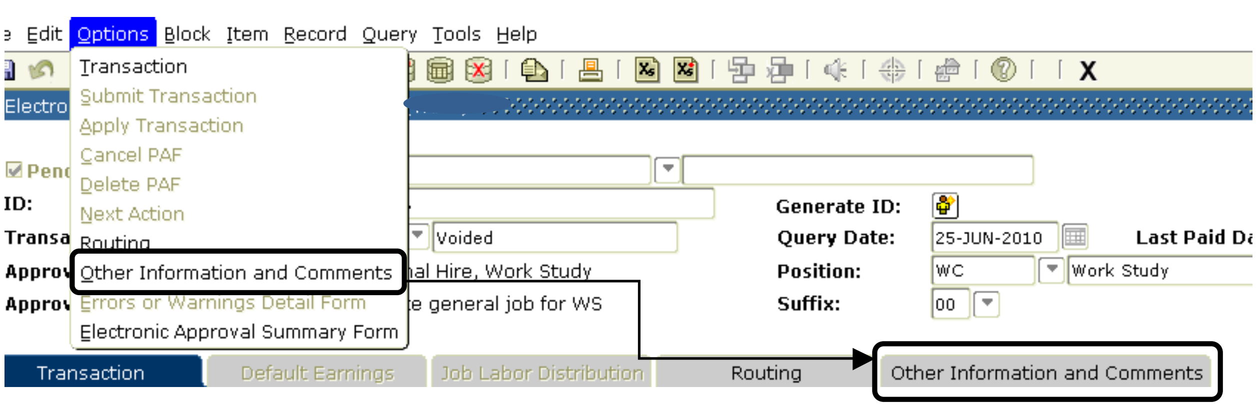
O. ***Salary Encumbrance*** – Leave this field blank.

P. ***Time Entry Method*** – This will automatically populate with **W**. Unless your department enters in timesheets for employees (**D**), do not change this field.



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

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

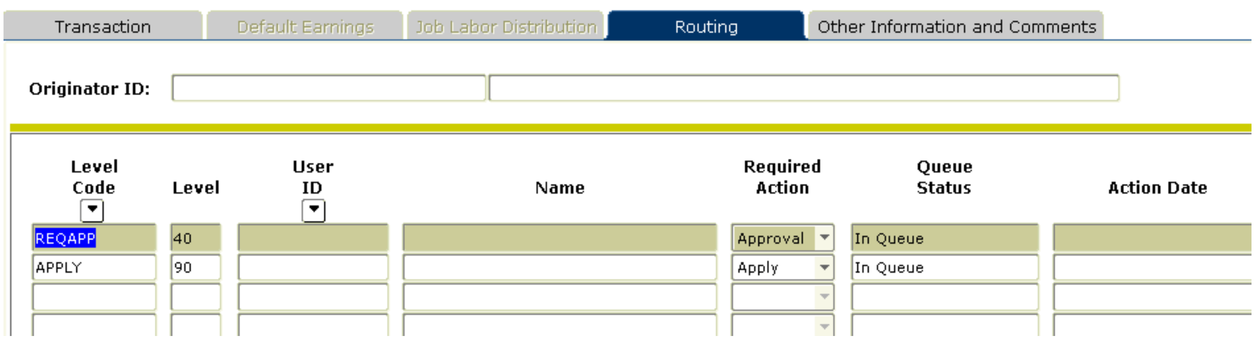


A. Enter the name, G number, and the position number of the individual who will approve the timesheet for this person and any other important information pertaining to the transaction. Due to the volume of EPAFs HR must review, the transaction might be returned to you if do not include timesheet approval information.

B. 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.

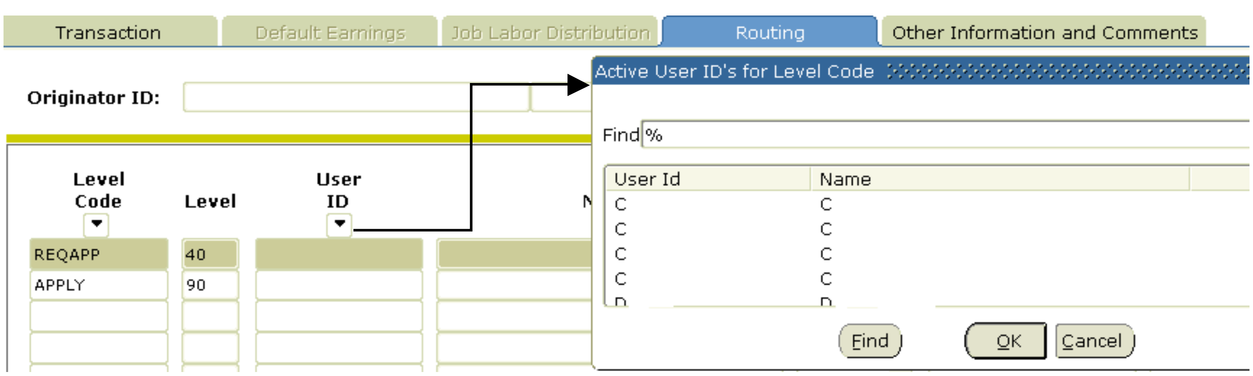
17. Once you have entered information in the **Comment** field, click the **F10** button or the  icon to save.

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



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**.

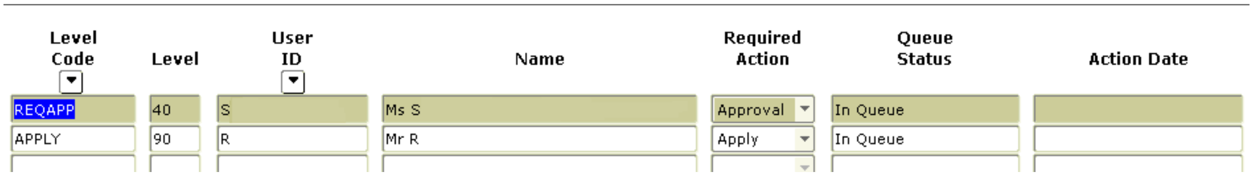
B. The **Required Approver** is generally the departmental approver.



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.).

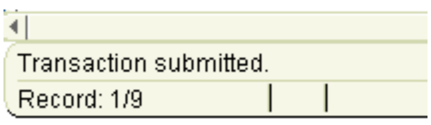
WARNING: Once you submit this transaction you ***cannot*** delete or void it. You will need to contact the appropriate approver or the HR Assistant to have the transaction voided. If you want to delete or void it prior to submission, select **Delete PAF** from the **Options** menu (you must first return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



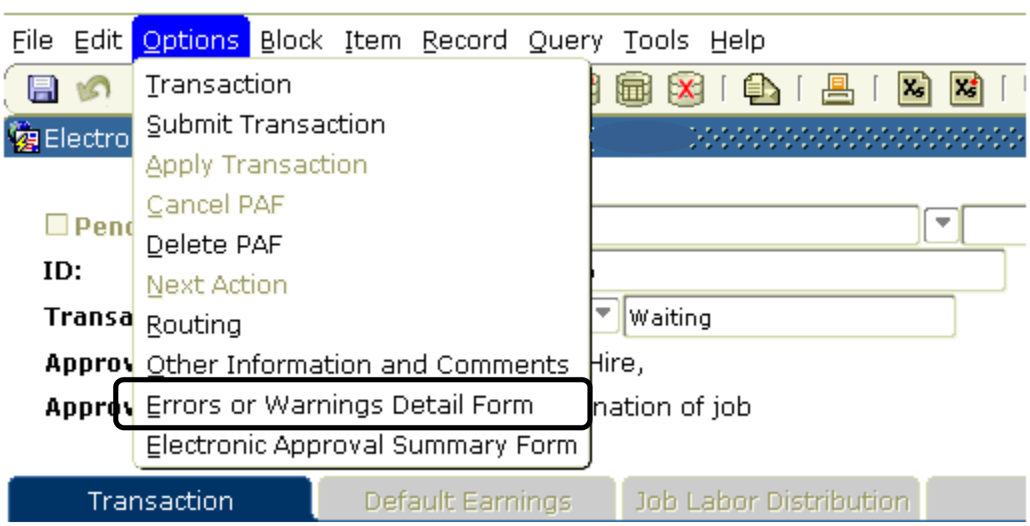
19. Once you have entered routing information, click the **F10** button or the **Save** icon.

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

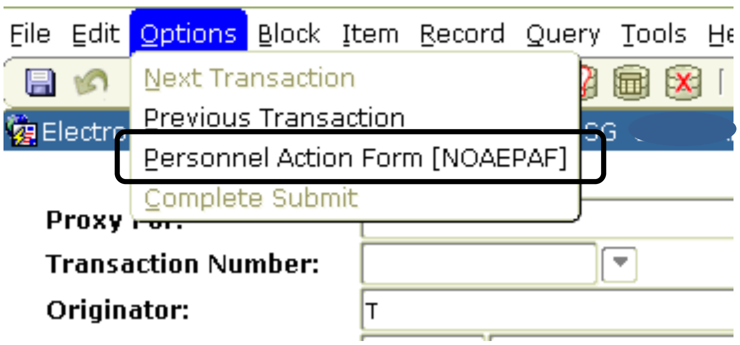
A. If the submission is complete, the bottom left corner of the screen will say "transaction submitted."



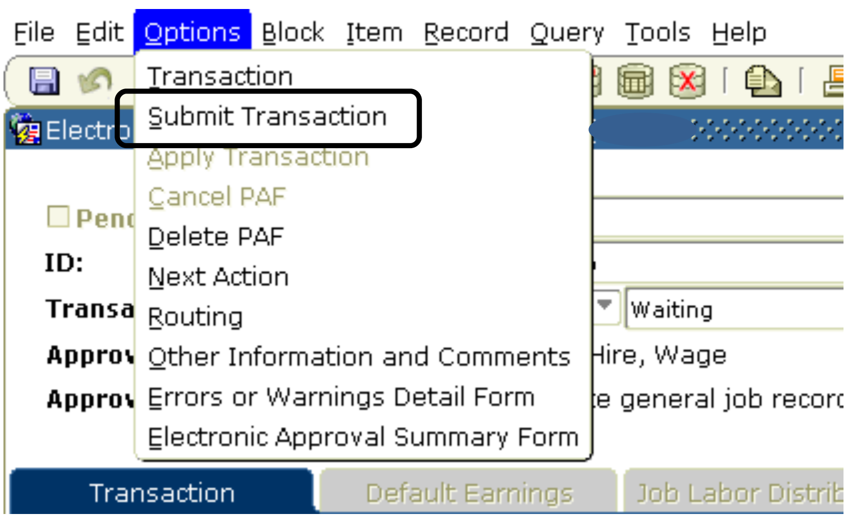
B. If transaction is not completed, the bottom left corner might note that there are errors or it might take you directly to the "Electronic Approvals Error Message," **NOIEMSG** page. A transaction with warnings can be submitted (you will need to select "Complete Submit" from the **Options** menu) but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